

TIA



September 7th – 8th
2019
Las Vegas, NV

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Refreshment Break
Sponsors

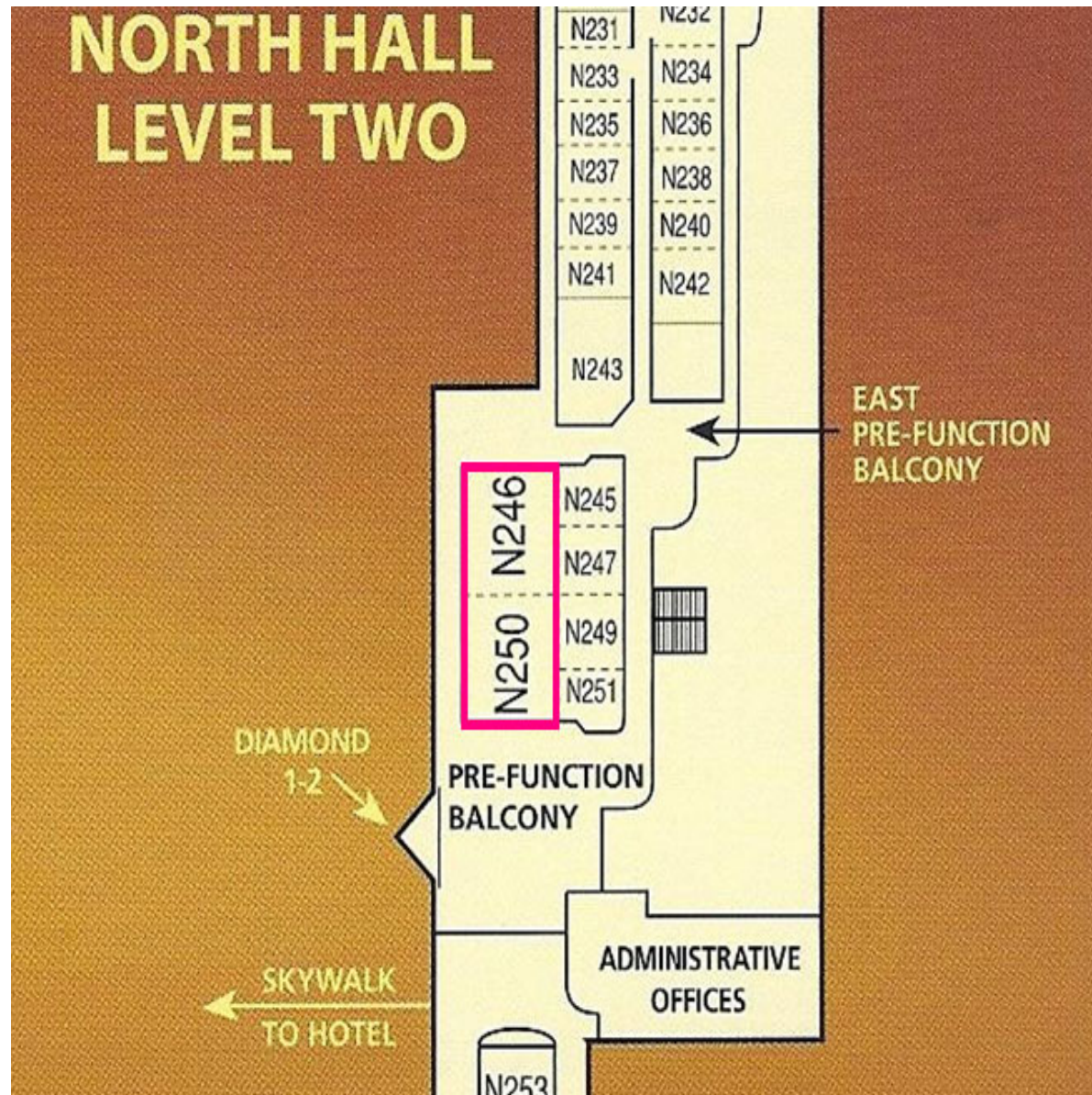


Presentation Agenda

- Details of Today's Events
- The Tortilla Market
 - United States
 - Europe (Tortillas & Flatbreads Data)
- TIA's Role In Promoting Your Success

Your First TIA Event?

**PLEASE RAISE YOUR
HAND!**



Classes: Room N-250
Lunch & Reception: N-246



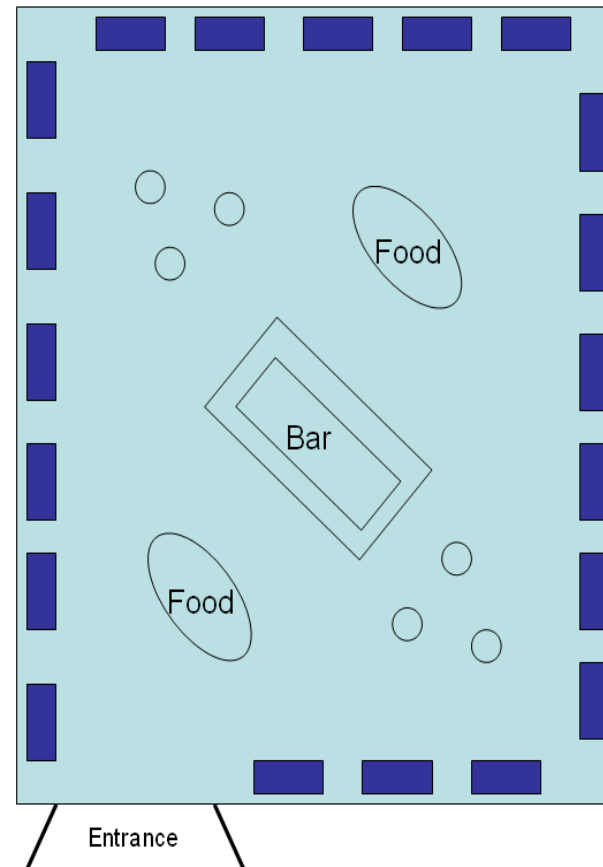
TABLETOPS RECEPTION

Saturday September 7th – 5:00 pm
Room N-246 (connected to Classroom)

TABLETOP EXHIBITORS

Azteca Milling
Advanced Flexible
Composites
Bakery Concepts Int.
Balchem Ingredient Solutions
BluePrint Automation
Bunge
Caldic
Casa Herrera
DQS Inc
Food Plant Engineering
FoodTools
Graincraft
JC Ford
Kemin
Lawrence Equipment
nano purification
Rovey Seed
Shaffer Mixers
The Ingredient House
Allied Blending LP
Great Plains Analytical Lab

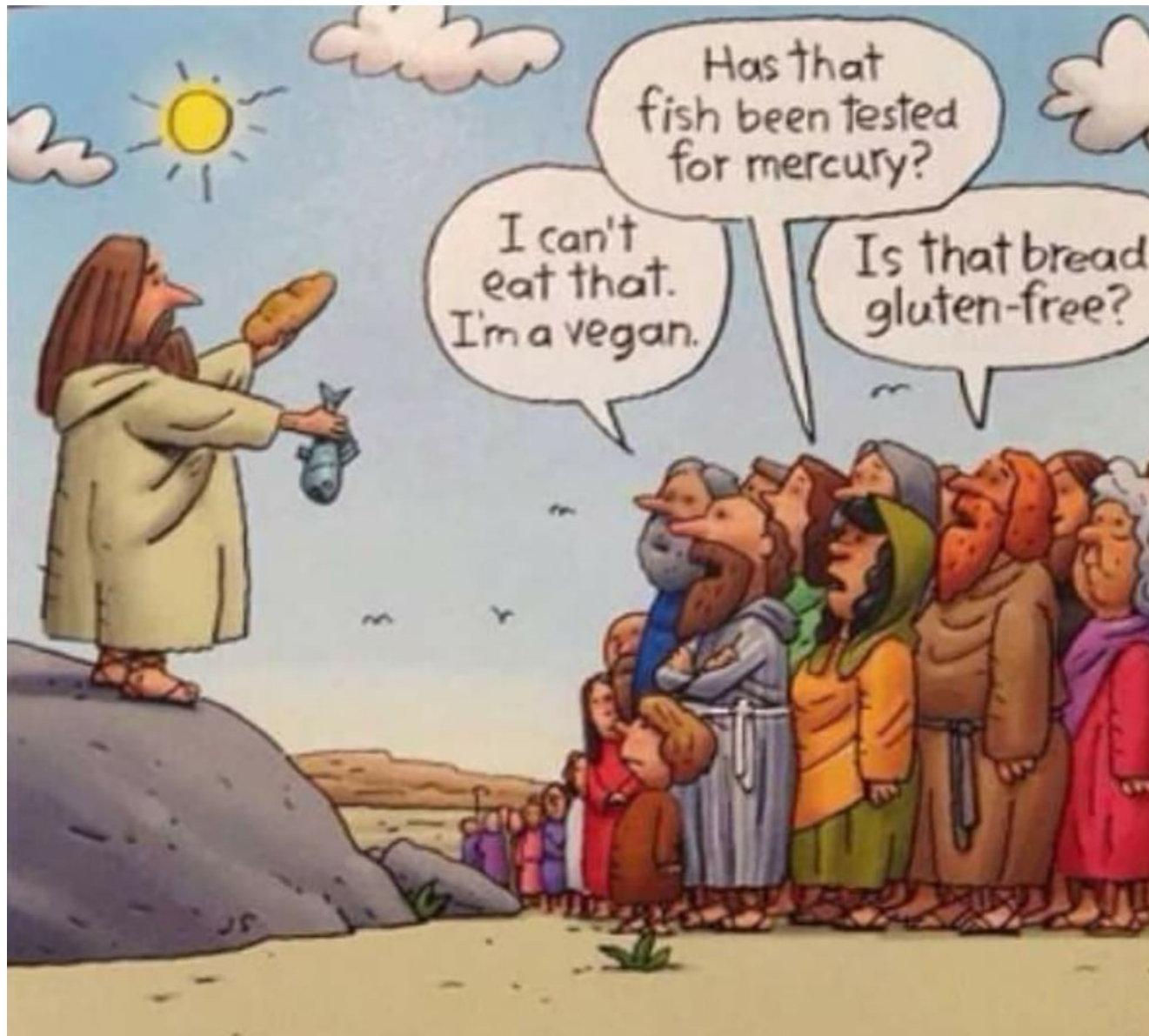
Floor Plan is Approximate & Subject To Change



PLEASE THANK OUR SPONSORS & EXHIBITORS FOR THEIR SUPPORT!

Our Members Face Increasingly Demanding Environment

If Jesus Tried To Feed The 5000 Today...!



AGENDA



TIA Tech Conference **2019** with IBIE - AGENDA

DAY 1 - Saturday Sept 7th

SPEAKER

8:30 - 9:00	1	Opening Session: Program Overview & Market Update	Jim Kabbani, TIA
9:00 - 9:50	2	Preparing for a successful BRC audit	Mike Pearsall, DQS
10:00-10:50	3	Understanding Your True Product Costs	Darrell Froud, Food Processing Opt.
11:00 - 11:50	4	Preventive Maintenance Tips & Techniques	Michael Minor, Tysons Food
12:00 - 1:00		Working Lunch: "Ask The Experts" Panel	Panel
1:00 - 1:50	5	Tortilla chip production best practices	Ryan Fuerte, Anita's
2:00 - 2:50	6	Commodities Forecast Update	Patrick Sparks
3:00 - 3:50	7	Maximizing Operational Efficiencies	Michael Minor, Tysons Food
4:00 - 4:50	8	Enzymes & Fibers for Specific Improvements	Anita Srivastava, Kemin
5:00 - 7:00		Cocktail & Tabeltops Reception	

DAY 2 - Sunday Sept 8th

8:30 - 9:15	1	Clean Label Strategies for Tortillas	Luis Belozерco, AIB
9:15-10:00	2	Troubleshooting Tortilla Production	Steve Bright, La Chiquita
10:00-10:45	3	FSMA Update for Tortilla Industry	Len Steed, AIB
11:00 AM		Go down to IBIE Exhibit Hall	

Sharing Latest Scientific Research



By Congressional Resolution September is National Tortilla Month



U.S. House of Representatives

WASHINGTON, D.C.

110TH CONGRESS

SECOND SESSION

Proclamation: National Tortilla Month

REP. DEVIN NUNES
21st District, California



WHEREAS, the Tortilla Industry Association, a non-profit trade association founded in 1990 to assist member companies, and the industry as a whole, in efficient growth and development, and to promote the consumption of tortillas and related food products;

AND WHEREAS, this year the association launched a number of significant new initiatives for the benefit of its members, prospective members, and Americans at large, including a new technical conference to help anyone interested in participating in the tortilla industry by teaching best practices and methods, a new scholarship fund, and a series of group-buying partnerships that will help businesses enjoy greater savings and buying power;

AND WHEREAS, I commend the Tortilla Industry Association for its efforts to support, educate, and advocate for members of this fast-growing industry;

NOW, THEREFORE, BE IT RESOLVED, that I, Congressman Devin Nunes, do hereby proclaim September as National Tortilla Month to highlight the contributions and hard work of this important industry. Congratulations on your years of success and best wishes for your future endeavors.

A handwritten signature in blue ink that reads "Devin Nunes".

Devin Nunes
Member of Congress

June 23, 2008

Learning From Each Other

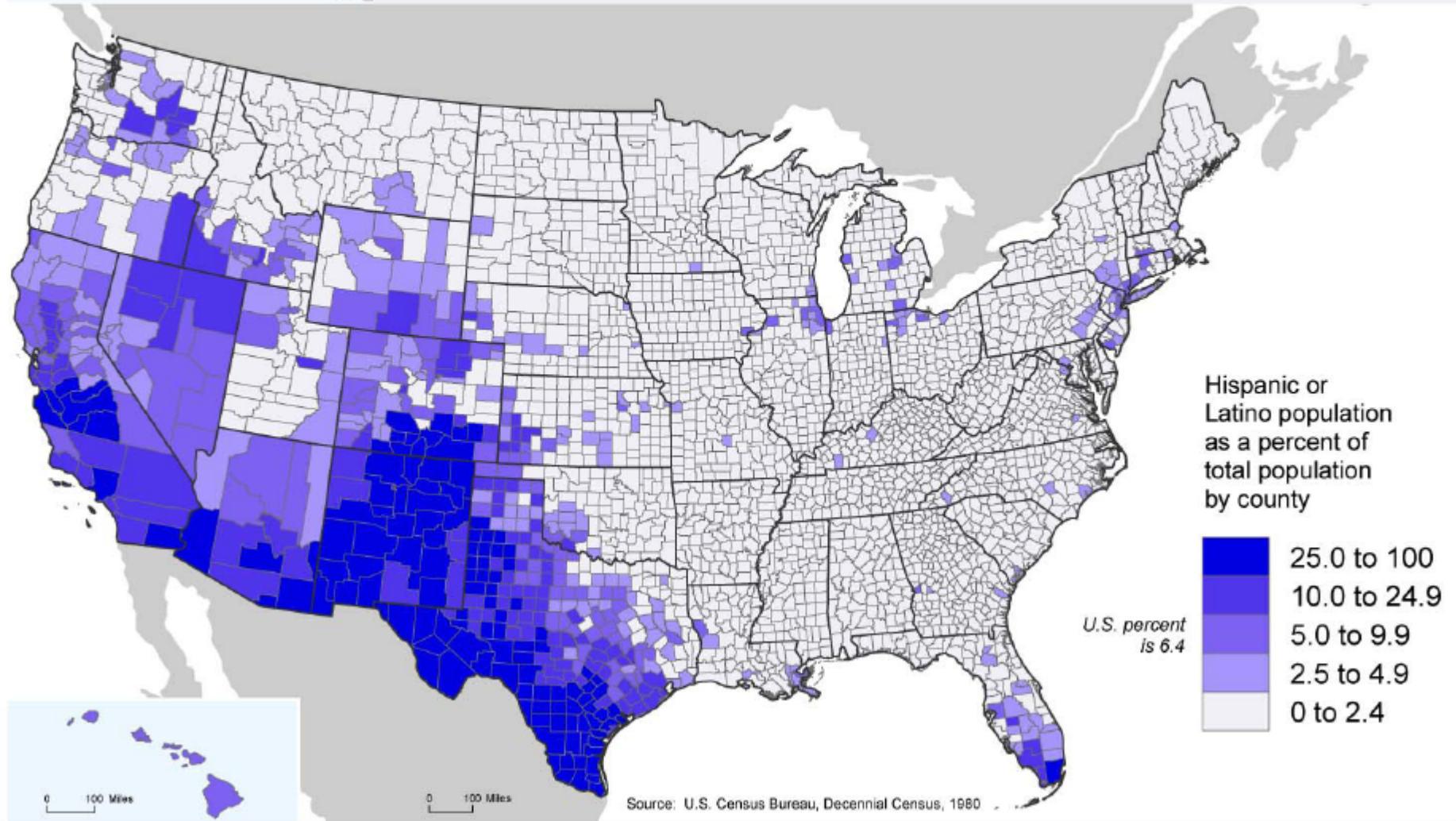
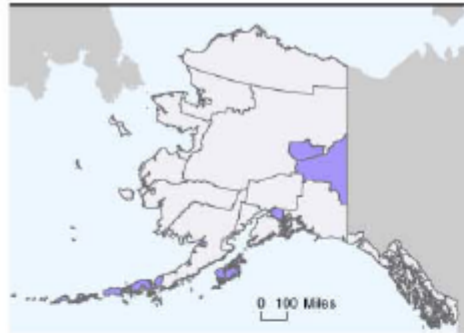
- Please See **“Ask The Experts”** Form On Your Chairs
- Fill It Out (Can Be Anonymous) & Turn In At TIA Desk Anytime Before Lunch
- Use It To Ask Questions You’d Like to Learn The Answer To ?
- Can Also Ask “Live” During Lunch

Data To Be Presented

- USA
 - Tortilla Market & Growth Drivers
- Europe
 - Top 4 Tortilla Countries
 - Top Brands Each Country
 - Top 3 Chips Countries
 - Top Brands Each Country
 - Other Flat-Bread Products
- Sources:
 - TIA Member Research
 - AC Nielsen Company
 - IRI
 - Euromonitor

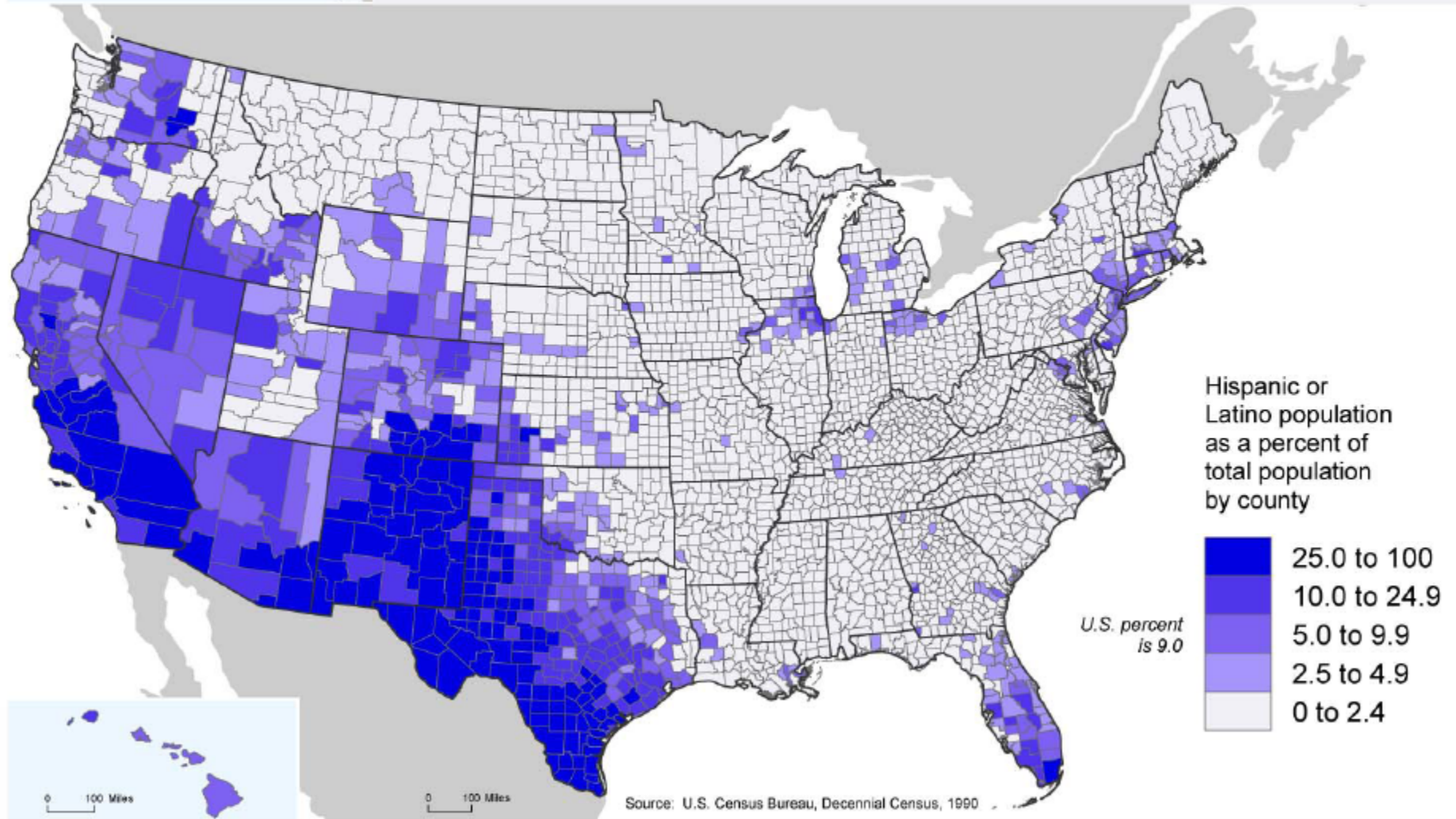
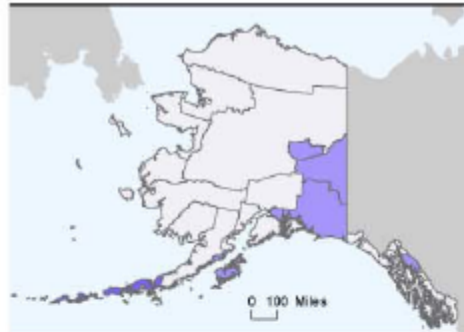
Demographic Market Drivers

Percent of Population 1980 Hispanic or Latino



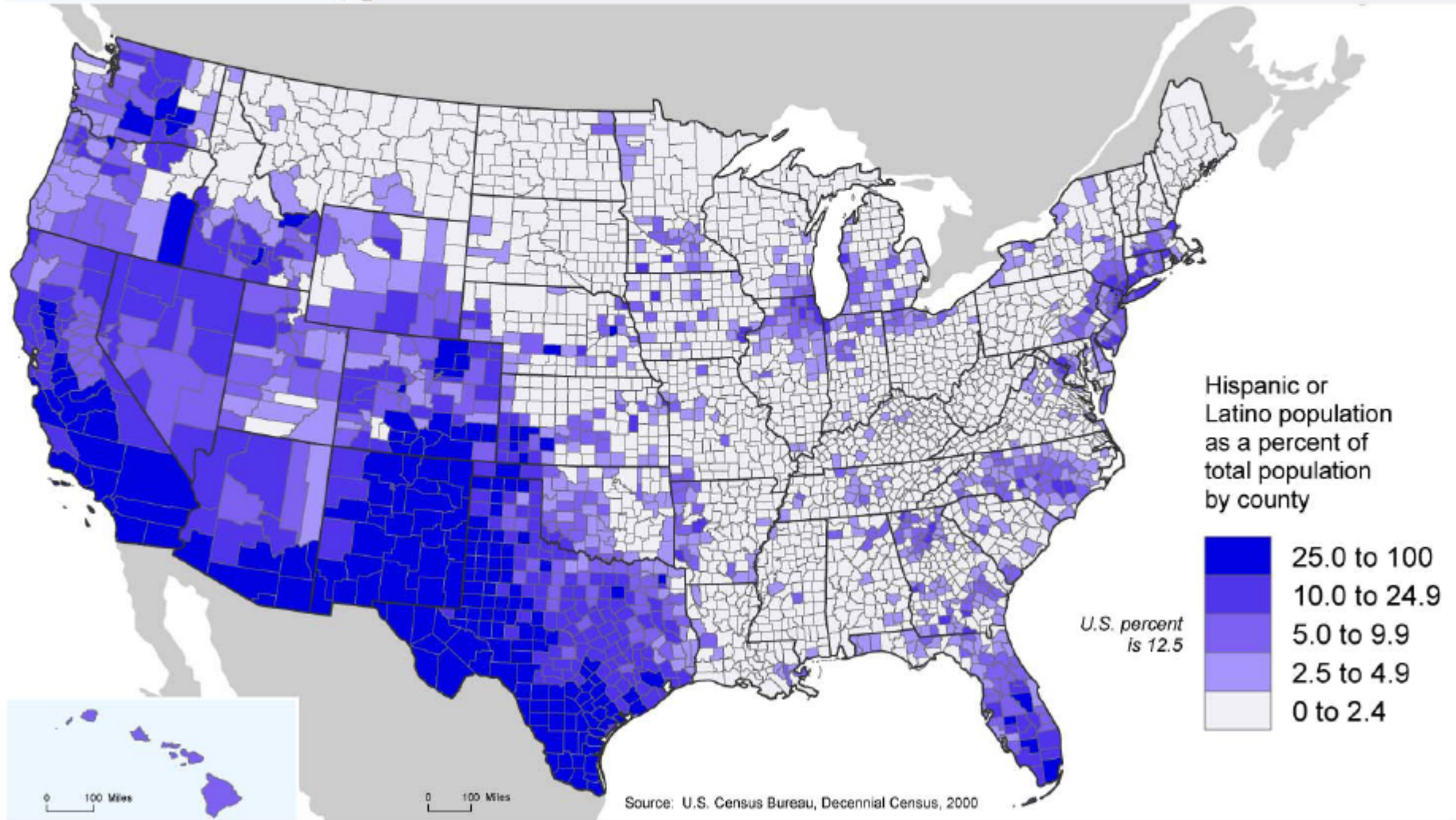
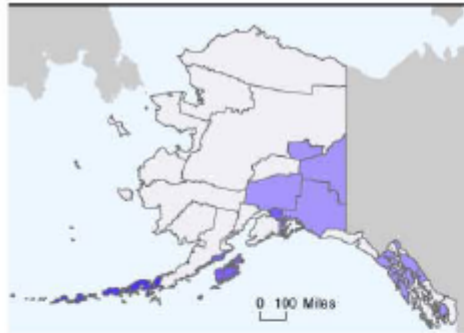
Source: U.S. Census Bureau, Decennial Census, 1980

Percent of Population 1990 Hispanic or Latino



Source: U.S. Census Bureau, Decennial Census, 1990

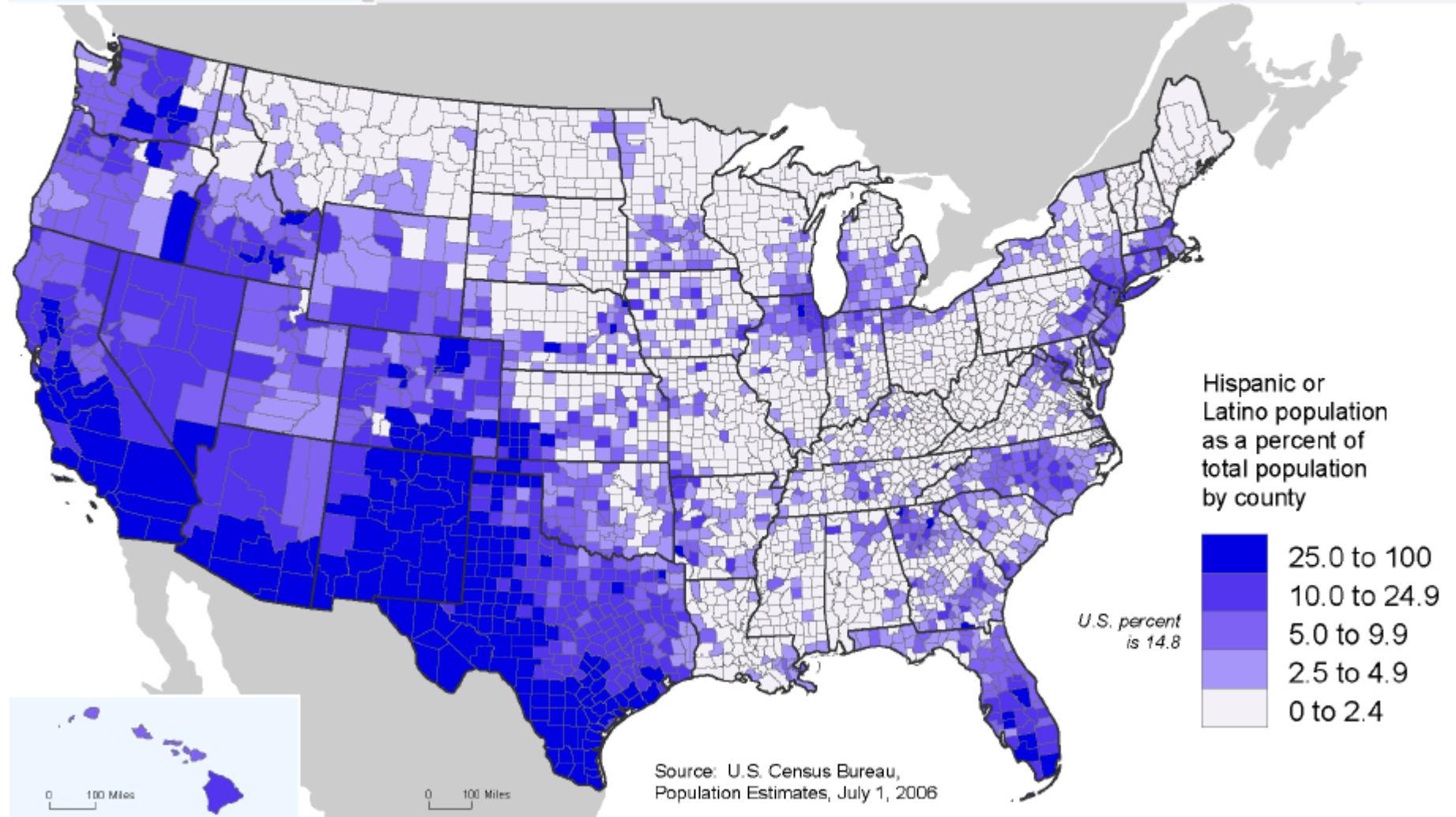
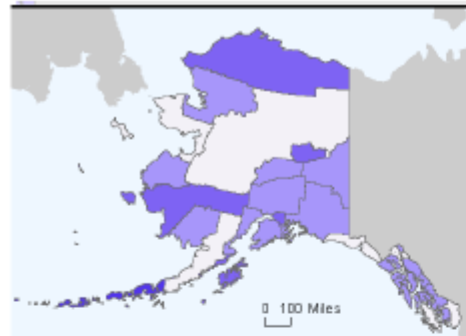
Percent of Population 2000 Hispanic or Latino



Source: U.S. Census Bureau, Decennial Census, 2000

Percent of Population 2006

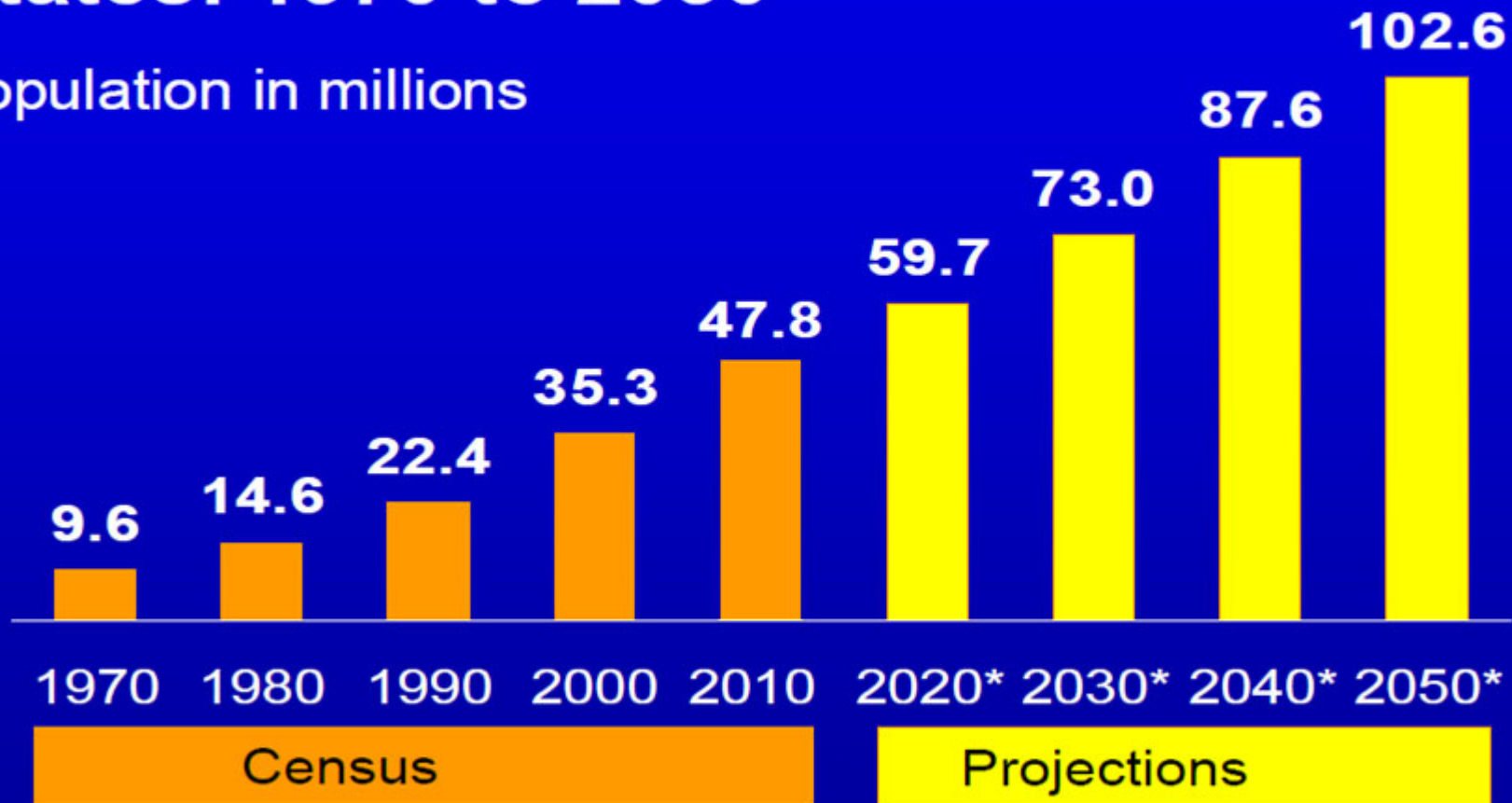
Hispanic or Latino



THE DEMOGRAPHIC DRIVER of U.S. TORTILLA SALES

Hispanic Population in the United States: 1970 to 2050

Population in millions



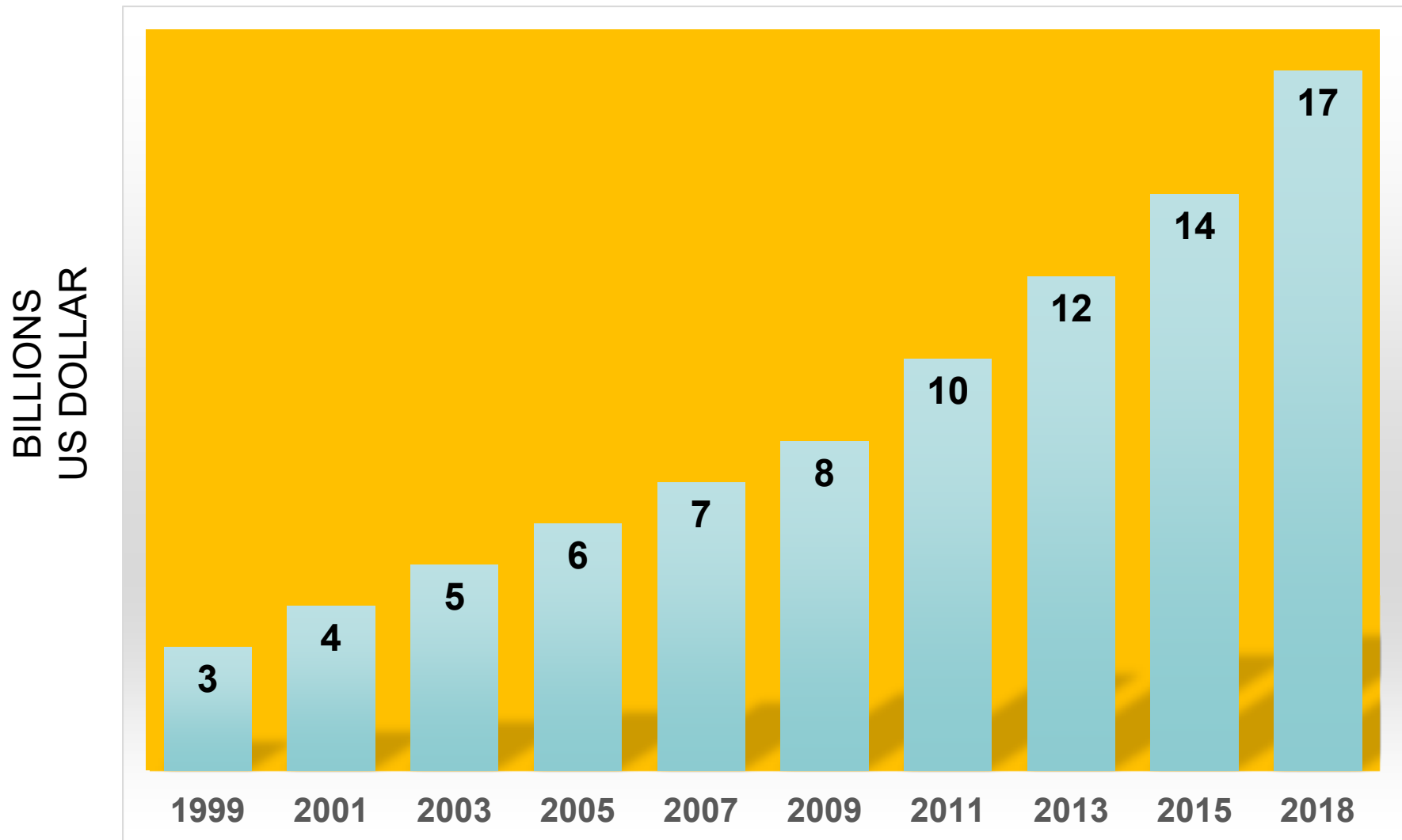
U S C E N S U S B U R E A U

*Projected Population as of July 1

3

Source: U.S. Census Bureau, 1970, 1980, 1990, and 2000 Decennial Censuses; Population Projections, July 1, 2010 to July 1, 2050

Tortilla Market Size USA



Market Size & Growth

- CAGR of 5-9% Since 1996
- Fueled By:
 - Demographics
 - Dietary Diversification among **All** Ethnic Groups
 - Economics
- US Sales in 2018 = \$17.1 Billion +
 - Salsa Outsold Ketchup in 2008
 - Tortillas Outsold White Sandwich Bread in 2010
 - Top 3 Ethnic Cuisine in US:
 1. Italian,
 2. Chinese,
 3. Mexican

Non-Demographic Drivers:

- Tremendous Growth Among Non-Hispanic Buyers
- Healthier Eating Alternatives To Many Other Bread Types
- Greater Variety in Tortilla Formulation
- More Options
 - Kosher
 - Organic
 - Gluten Free
- Convenience

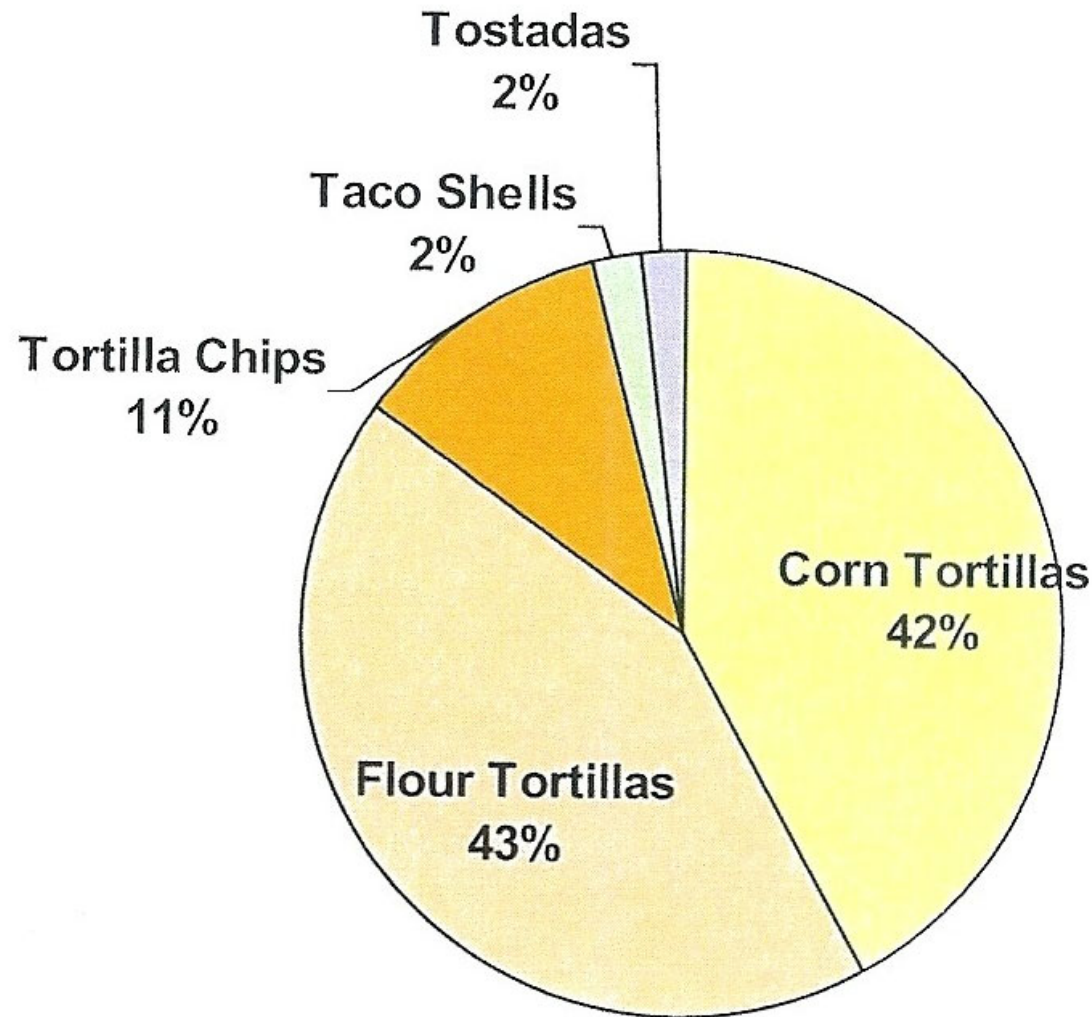
TRACKING METHODS

- US Dept Of Commerce Assigned NAICS Code **311830** to Tortilla Manufacturing
- But Many Major Players Are Conglomerates Therefore Under Other Codes
- Majority Of Tortilla Sales Not Seen By IRI
 - Less Than One Third Of Tortillas Are Sold Through Chain Retailers
 - Conversely, Relatively Large Portion Of Tortillas Are Part Of Other Product (Burritos, Wraps, Frozen Entrees) So Not Even Recorded As Tortilla Sales
- Traditional Preference For Fresh-Onsite Tortillas Makes Tortillas Manufactured In Restaurants and Small Store-fronts Untrackable
- TIA Combines Multiple Sources of Market Data **AND** Member Data, Applies Trend Analysis

2018 In US Dollars – By Type

Tostadas	2%	\$ 340,000,000
Taco Shells	2%	\$ 340,000,000
Tortilla Chips	11%	\$ 1,870,000,000
Flour Tortillas	43%	\$ 7,310,000,000
Corn Tortillas	42%	\$ 7,140,000,000
	100%	

2018 Product Types & Share

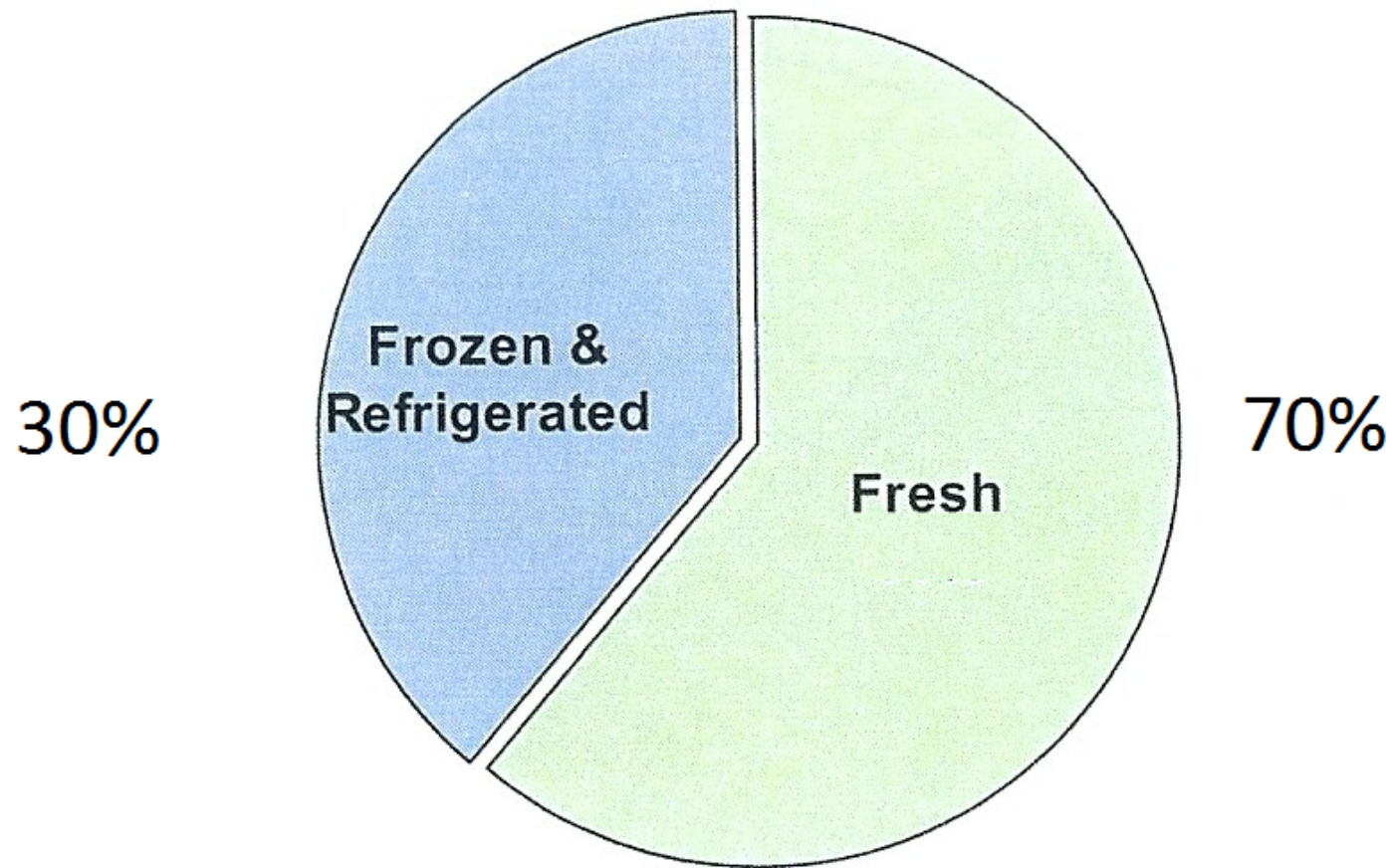


2018 Fresh Vs Frozen – Dollars

Fresh	70%	\$ 11,900,000,000
Frozen / Refrigerated	30%	\$ 5,100,000,000
	100%	

Fresh Vs. Frozen / Refrigerated

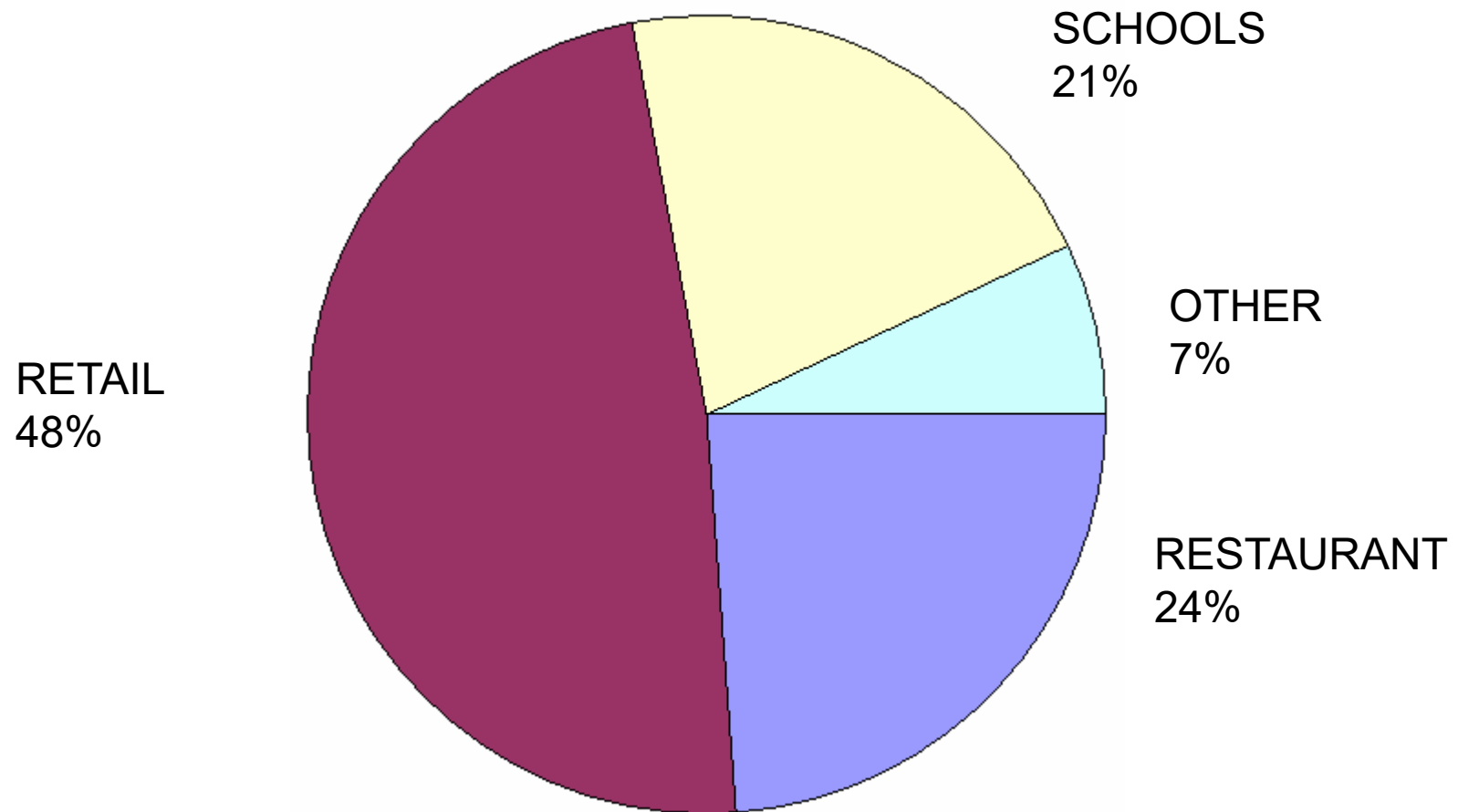
2018



2018 By Purchaser - In Dollars

Retail	48%	\$ 8,160,000,000
Restaurant	24%	\$ 4,080,000,000
Schools & Govt Institutions	21%	\$ 3,570,000,000
Other	7%	\$ 1,190,000,000
	100%	

2018 Sales By Purchaser

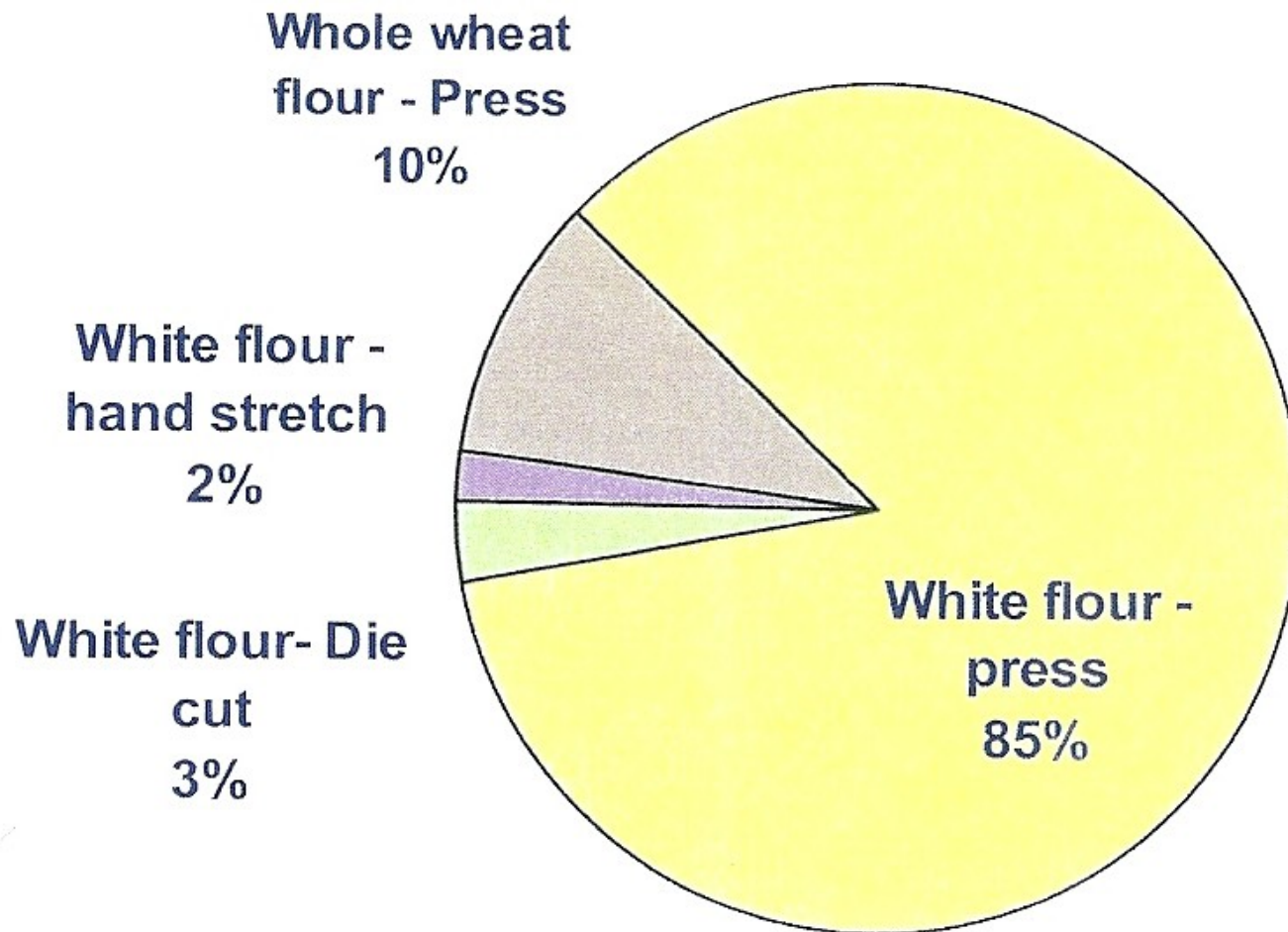


Includes IRI Data

2018 Flour Tortillas – In Dollars

White flour - Press	85%	\$ 14,450,000,000
White flour - Hand Stretch	2%	\$ 340,000,000
White flour - Die Cut	3%	\$ 510,000,000
Whole Wheat - Press	10%	\$ 1,700,000,000
TOTAL	100%	

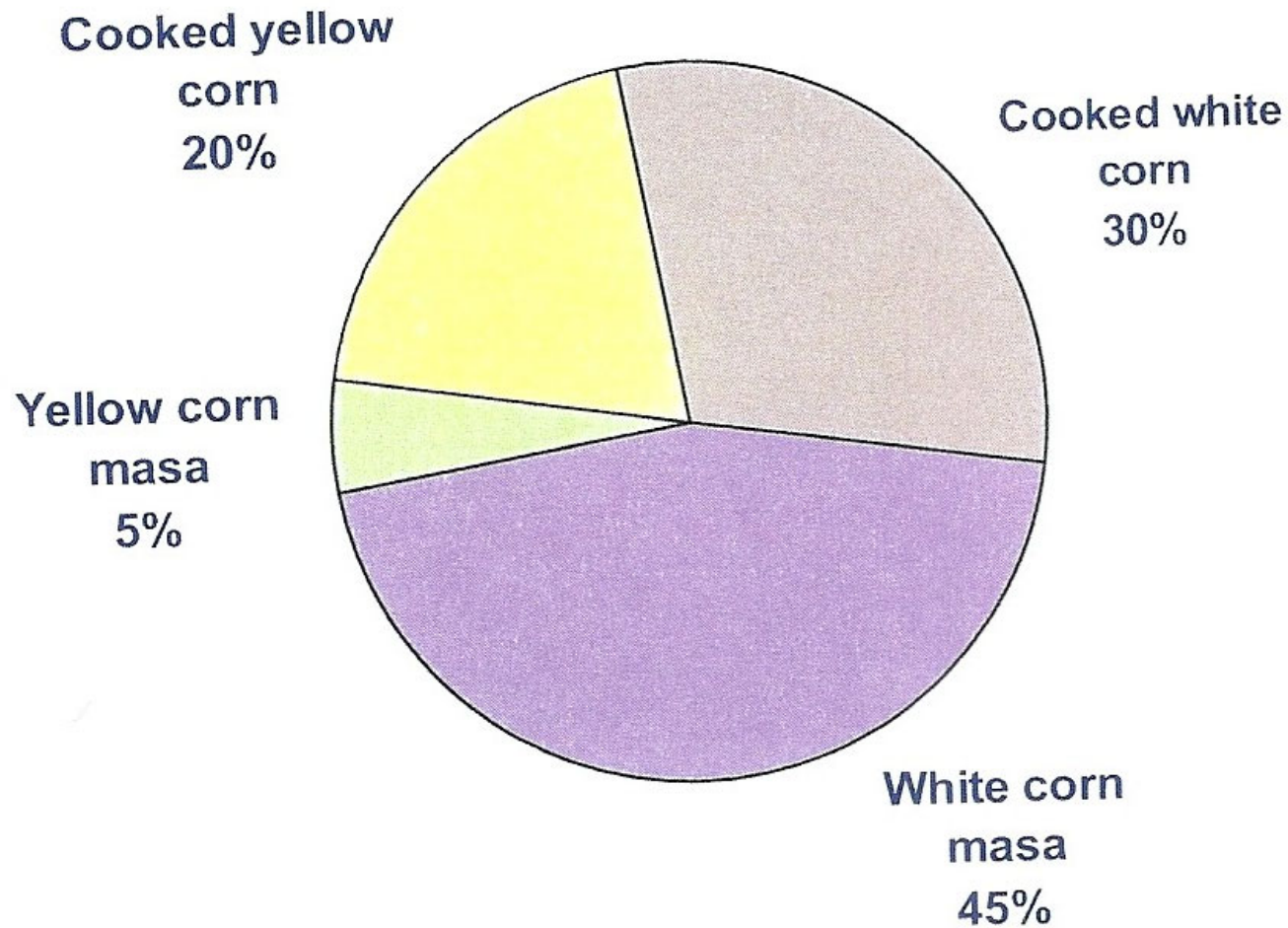
2018 Flour Tortillas



2018 Corn Tortillas – In Dollars

Masa - White Corn	45%	\$ 7,650,000,000
Masa - Yellow Corn	5%	\$ 850,000,000
Cooked - White Corn	30%	\$ 5,100,000,000
Cooked - Yellow Corn	20%	\$ 3,400,000,000
TOTAL	100%	

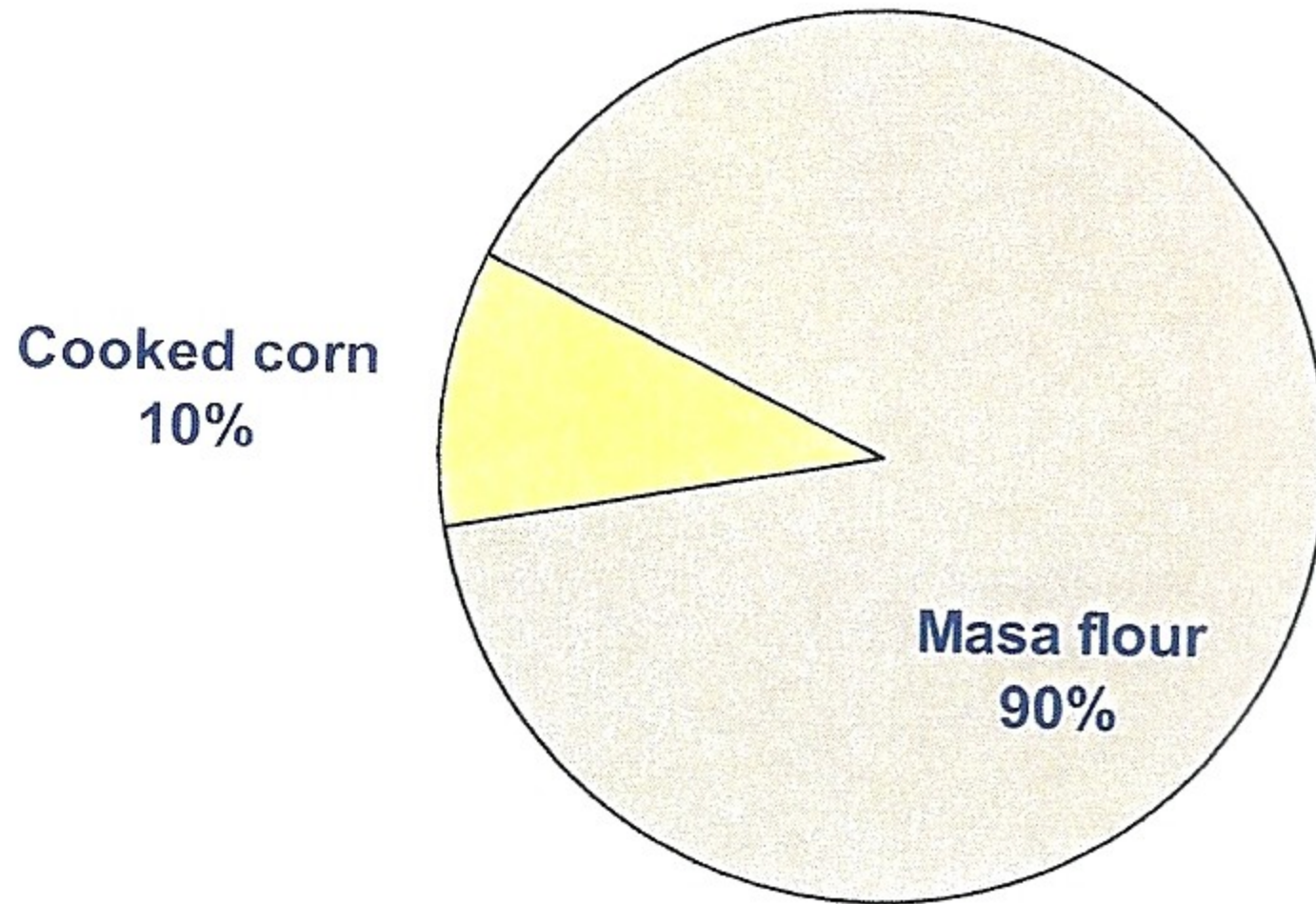
2018 Corn Tortillas



2018 Tortilla Chips – In Dollars

Masa Flour	90%	\$ 1,683,000,000
Cooked Corn	10%	\$ 187,000,000
	100%	

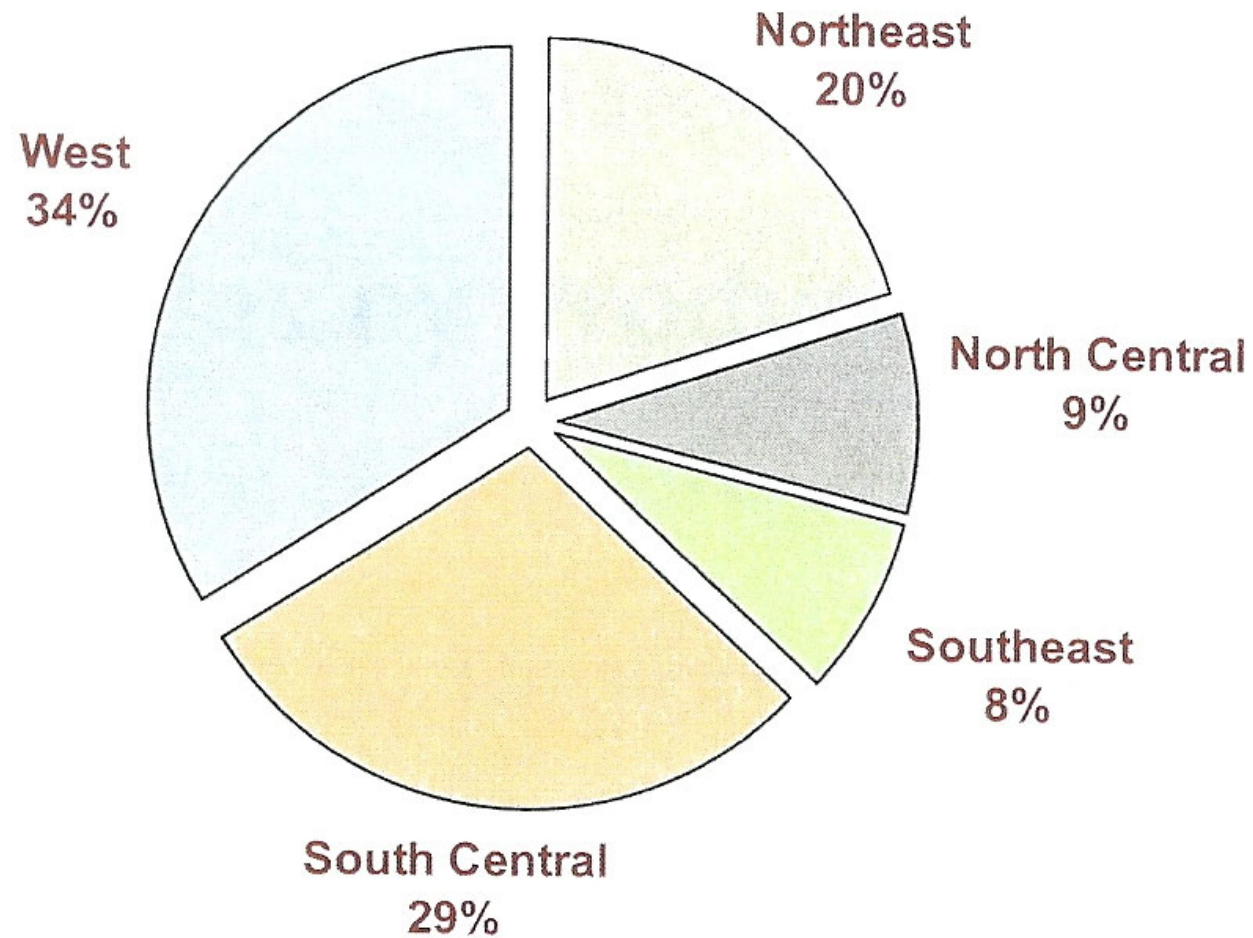
2018 Tortilla Chips



2018 US Region – In Dollars

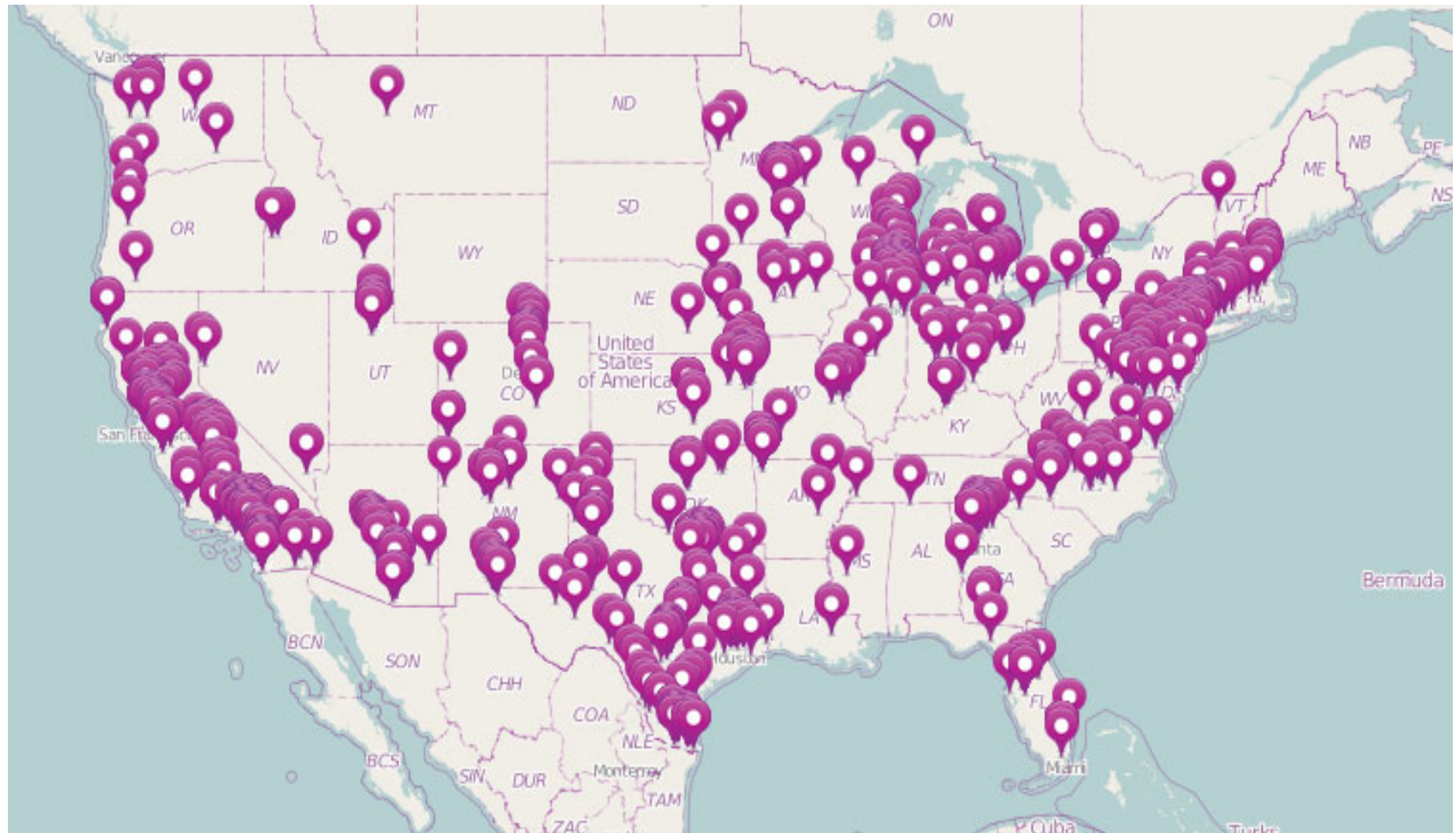
West	34%	\$ 5,780,000,000
South Central	29%	\$ 4,930,000,000
NorthEast	20%	\$ 3,400,000,000
North Central	9%	\$ 1,530,000,000
South East	8%	\$ 1,360,000,000
	100%	

2018 By US Region





Continental U.S. Tortilla Plants



Mexican Restaurants in US

47,000 “independent” Mexican restaurant locations (means they are either stand-alone or part of a chain of 100 or fewer units)

11,000 more in “big chains” such as Taco Bell and Chipotle



58,000 Total

FLOUR		
20% Make Own		11,600
37% Buy Pre-Made		21,460
CORN		
13% Make Own		7,540
30% Buy Pre-Made		17,400

Source: El Restaurante Magazine

Mexican Grocery Stores



www.alamy.com - E5WCA2

- Approximately 28,000 Mexican Grocery Stores in US
- Of these, Approx 24,000 are Large to Mid-Size or Multi-Location, Stable and Solvent
- Remaining 4,000 either very small or unstable
- Of the 24,000 approx. 17% make their own tortillas on-site, or about 4,080 Mexican Grocery Stores



What We Learned



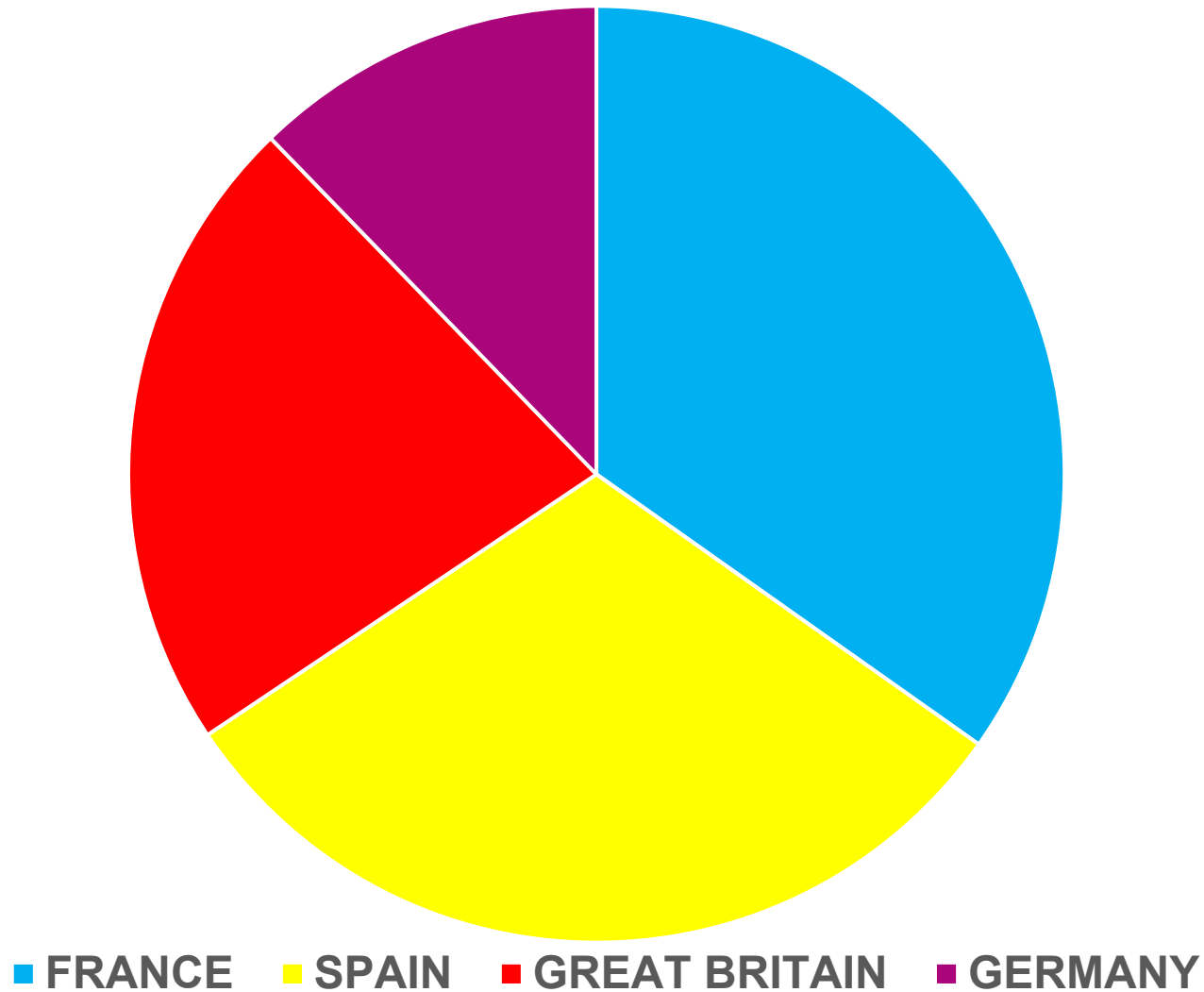
EUROPE MARKET DATA

Sources: AC Nielsen, IRI, EuroMonitor

Europe – Top 4 Tortilla Sales 2017

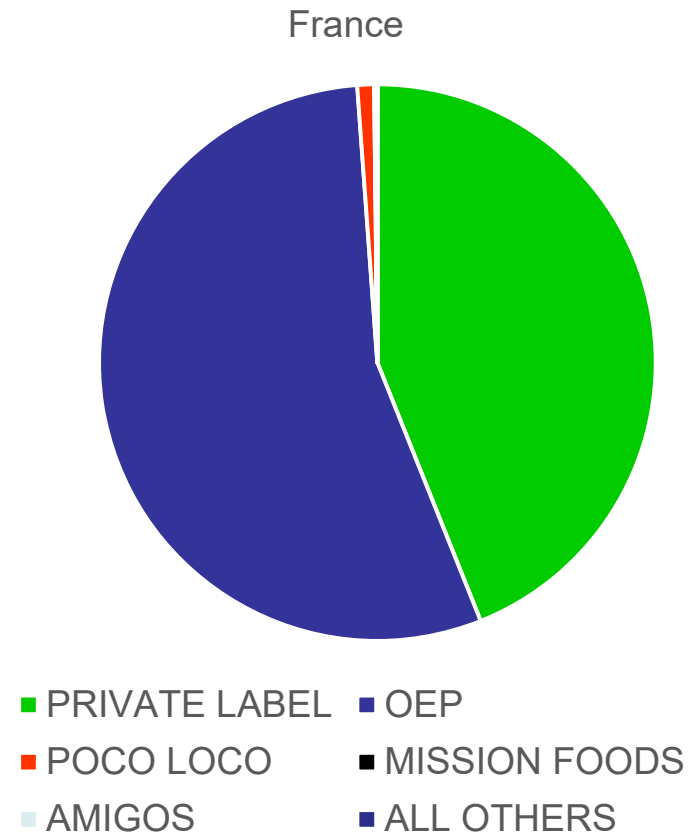
FRANCE	\$ 45,708,000
SPAIN	\$ 40,503,000
GREAT BRITAIN	\$ 29,093,000
GERMANY	\$ 16,106,000
Total	\$ 131,409,000

Europe – Top 4 Tortilla



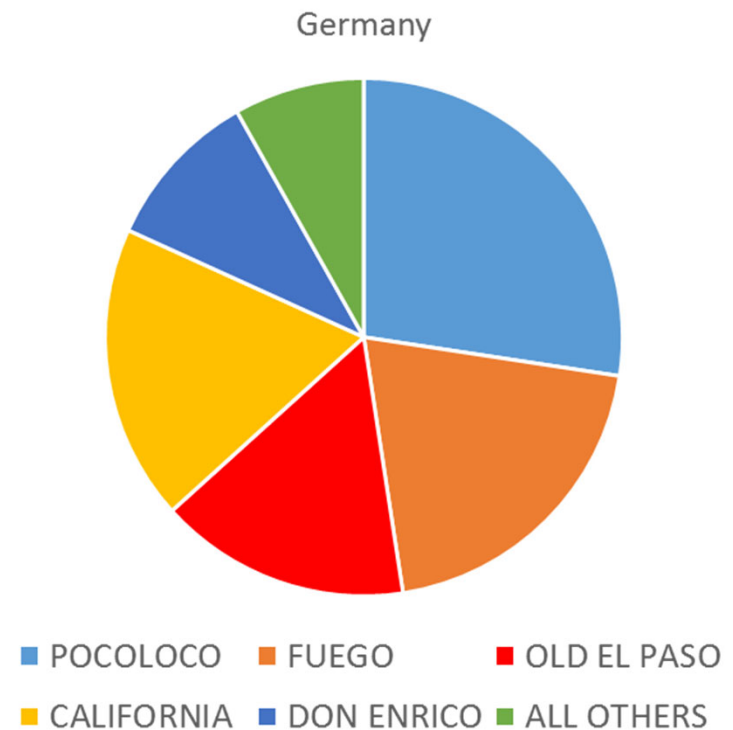
FRANCE Tortillas – By Brand

PRIVATE LABEL	\$20,087,000
OEP	\$25,090,000
POCO LOCO	\$447,000
MISSION FOODS	\$14,000
AMIGOS	\$69,000
Total	\$45,708,000



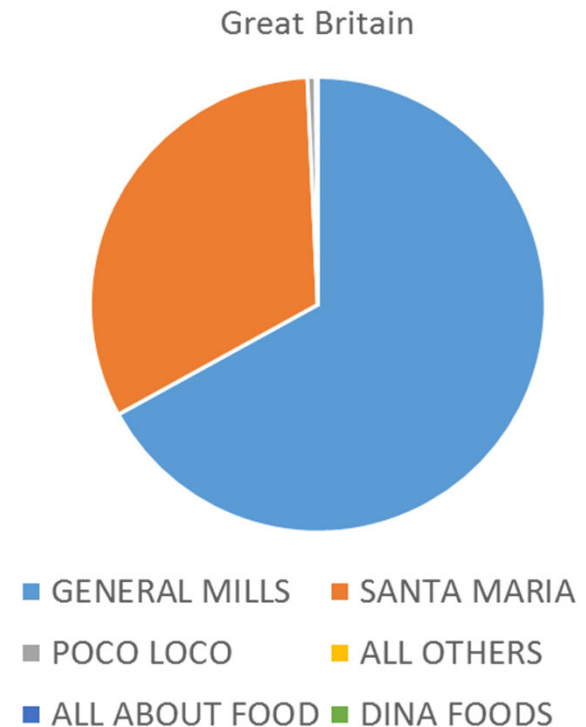
GERMANY Tortillas – By Brand

POCOLOCO	\$4,413,000
FUEGO	\$3,250,000
OLD EL PASO	\$2,533,000
CALIFORNIA	\$2,976,000
DON ENRICO	\$1,620,000
ALL OTHERS	\$1,315,000
Total	\$16,106,000



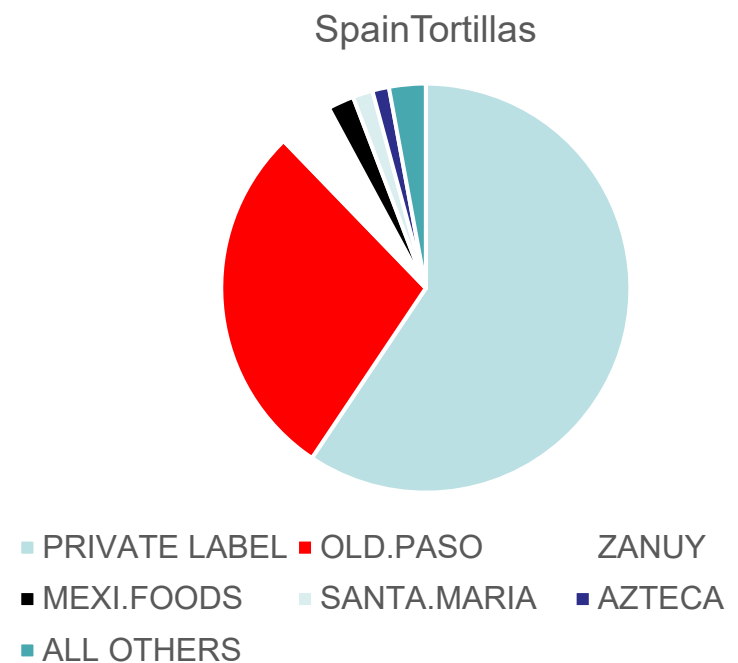
GREAT BRITAIN Tortillas By Brand

GENERAL MILLS	\$ 16,308,000
SANTA MARIA	\$ 7,857,000
POCO LOCO	\$ 144,000
ALL OTHERS	\$ 19,000
ALL ABOUT FOOD	\$ 10,000
DINA FOODS	\$ 6,000
Total	\$ 24,343,000



SPAIN Tortillas – By Brand

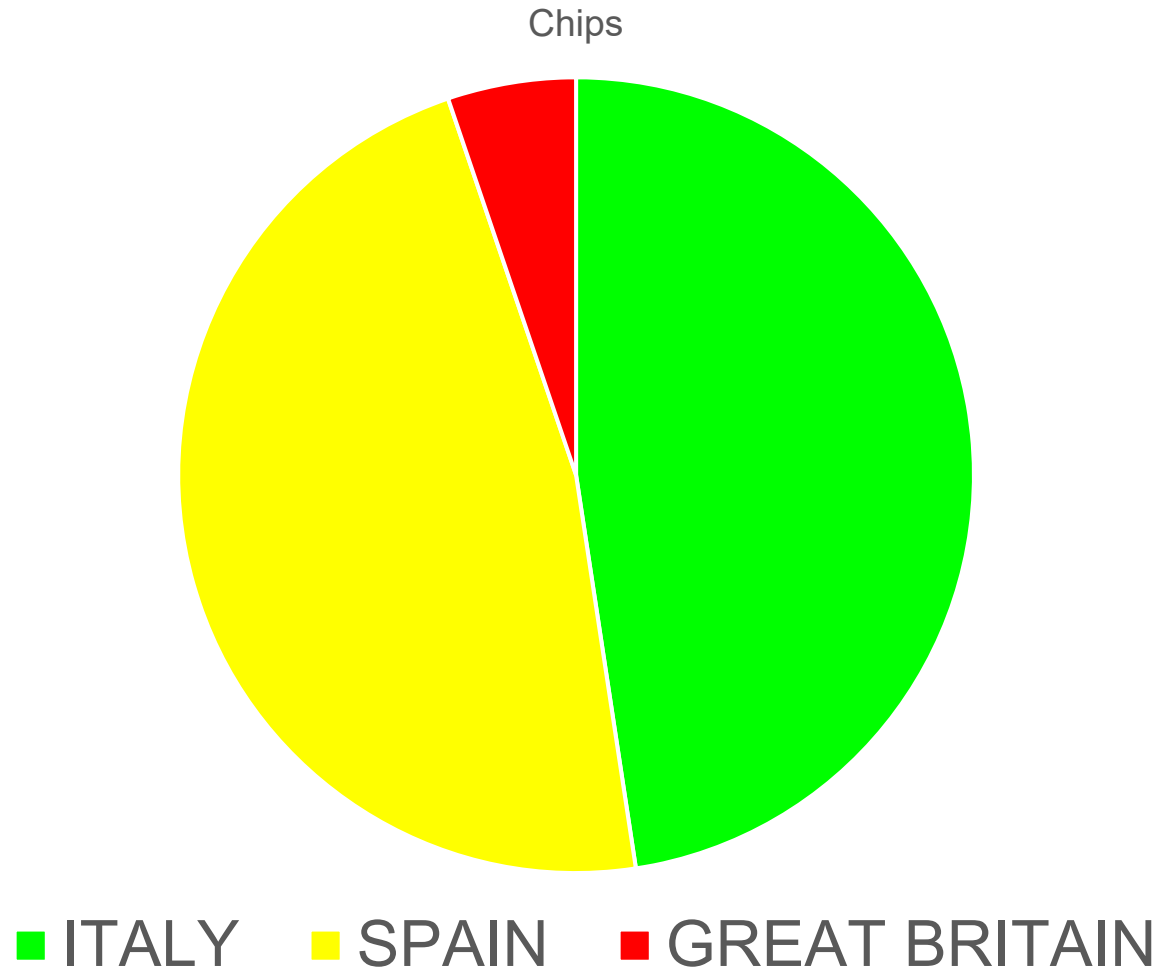
PRIVATE LABEL	24,056,000
OLD.PASO	11,496,000
ZANUY	1,767,000
MEXI.FOODS	839,000
SANTA.MARIA	641,000
AZTECA	531,000
ALL OTHERS	1,173,000
Total	\$40,503,000



Europe – Top 3 - Chips

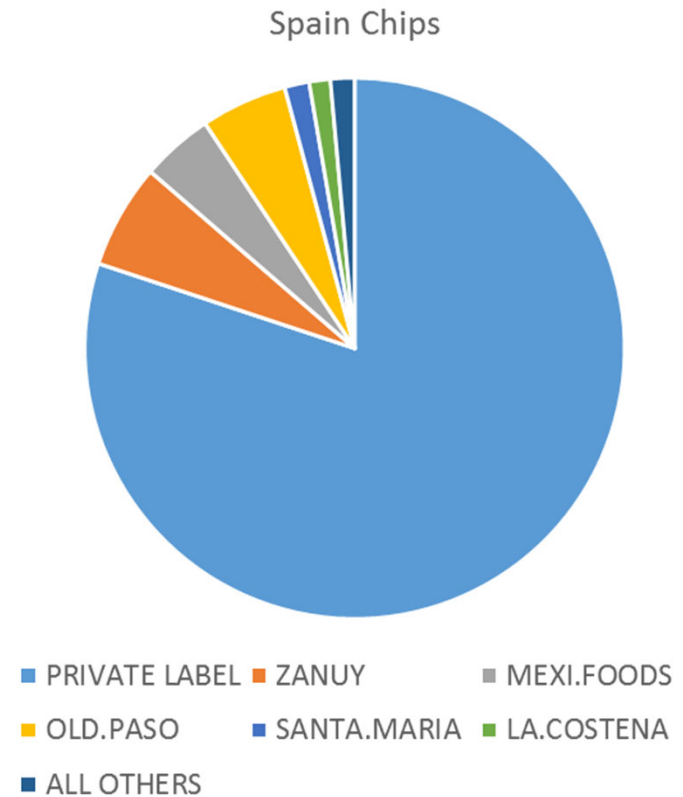
ITALY	\$25,553,000
SPAIN	\$25,331,000
GREAT BRITAIN	\$2,800,000

Europe – Top 3 - Chips



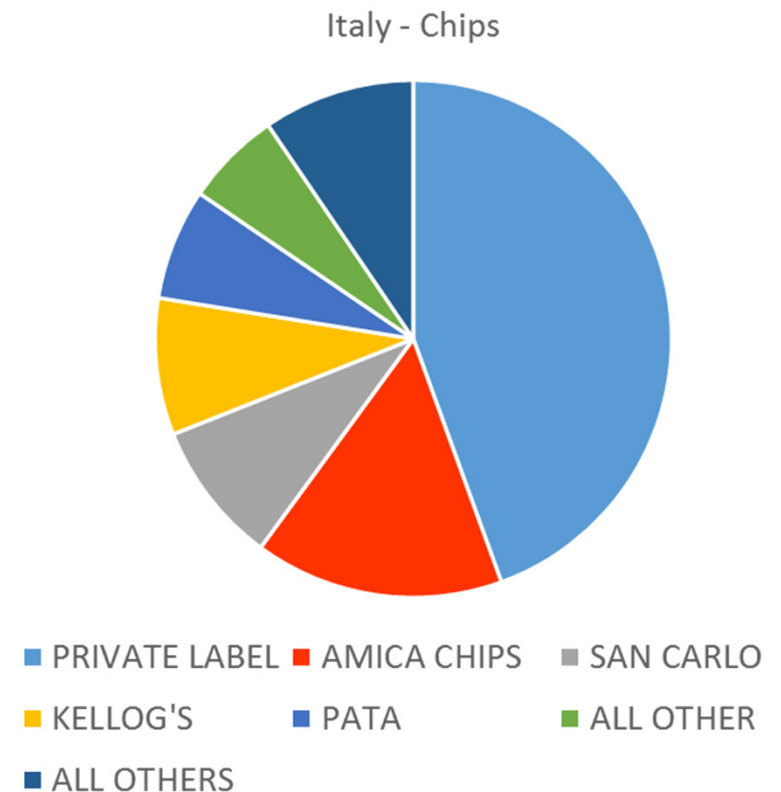
SPAIN – Chips

PRIVATE LABEL	\$ 20,285,000
ZANUY	\$ 1,585,000
MEXI.FOODS	\$ 1,092,000
OLD.PASO	\$ 1,310,000
SANTA.MARIA	\$ 374,000
LA.COSTENA	\$ 319,000
ALL OTHERS	\$ 366,000
Total	\$ 25,331,00



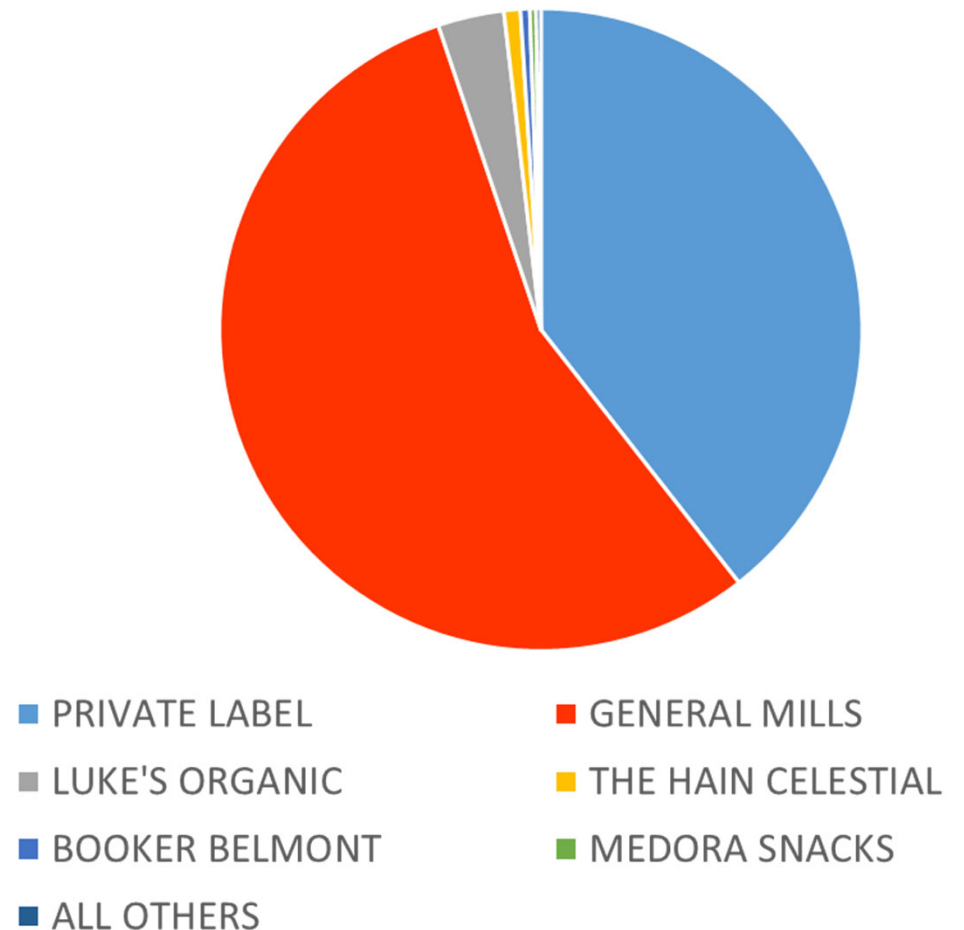
ITALY – Chips

PRIVATE LABEL	\$13,448,000
AMICA CHIPS	\$ 4,719,000
SAN CARLO	\$ 2,699,000
KELLOG'S	\$ 2,586,000
PATA	\$ 2,106,000
ALL OTHER	\$ 1,812,000
ALL OTHERS	\$ 2,876,000
Total	\$ 30,245,000



GREAT BRITAIN – Chips

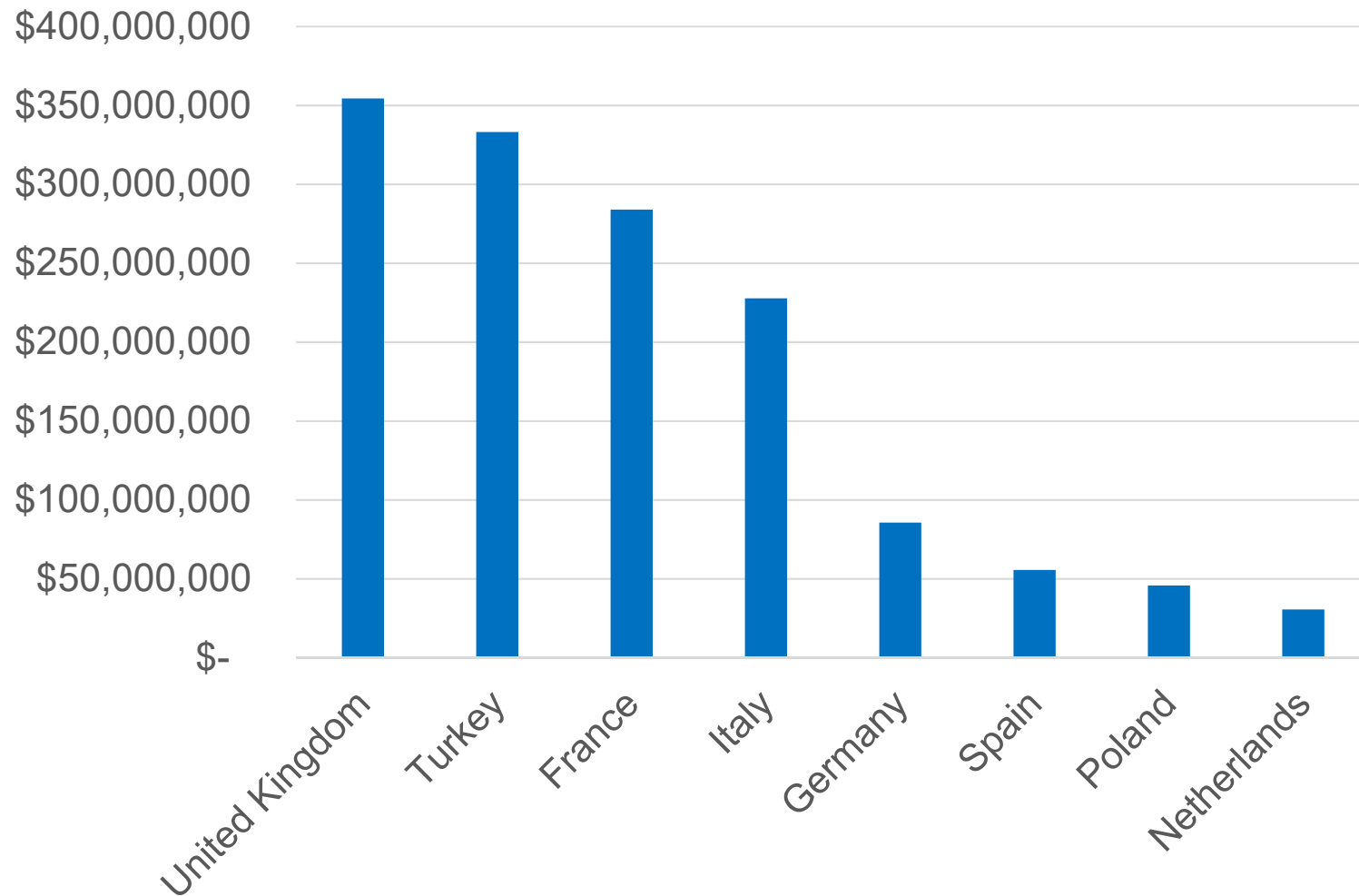
PRIVATE LABEL	\$ 1,381,000
GENERAL MILLS	\$ 1,940,000
LUKE'S ORGANIC	\$ 117,000
HAIN CELESTIAL	\$ 29,000
BOOKER BELMONT	\$ 16,000
MEDORA SNACKS	\$ 11,000
ALL OTHERS	\$ 8,000
Total	\$ 3,502,000



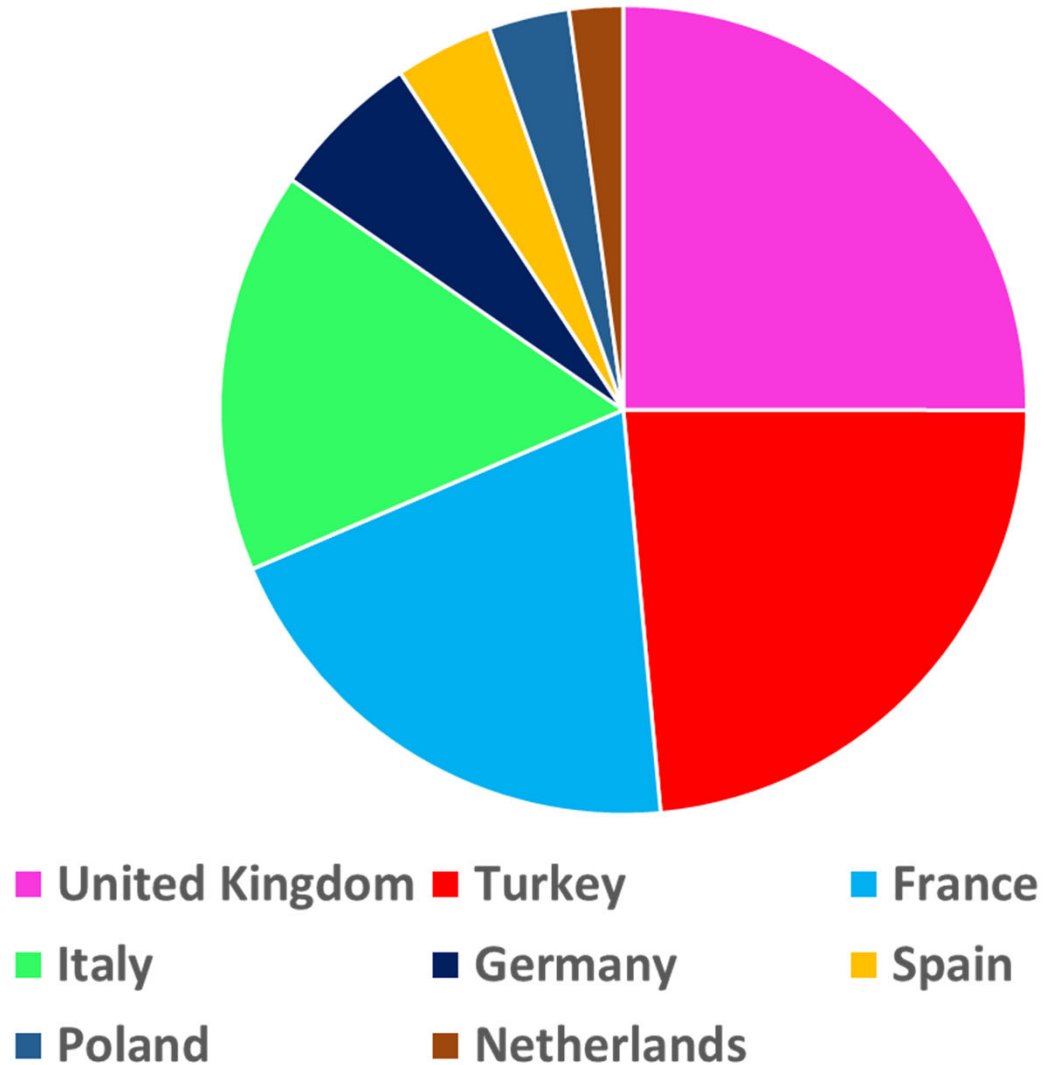
All Flat-Breads – EUROPE top 8

United Kingdom	\$	354,400,000
Turkey	\$	333,100,000
France	\$	284,000,000
Italy	\$	227,700,000
Germany	\$	85,600,000
Spain	\$	55,600,000
Poland	\$	45,800,000
Netherlands	\$	30,600,000
TOTAL	\$	1,416,800,000

All Flat-Breads – EUROPE top 8

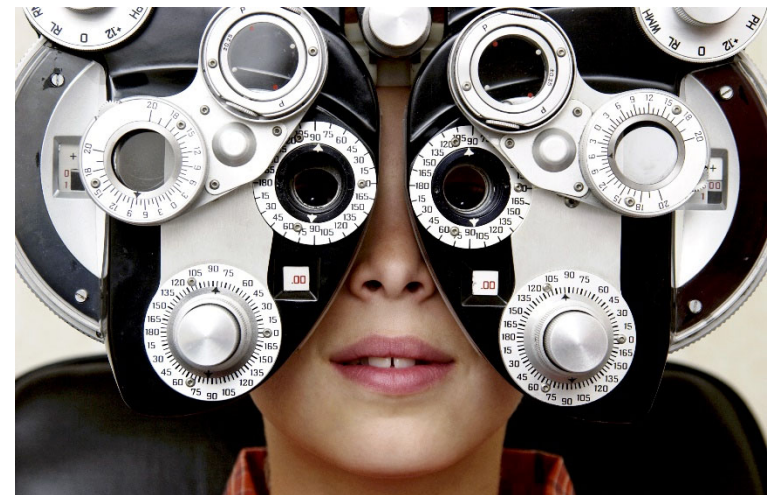


All Flat-Breads – EUROPE top 8



Flatbread Notes by Country

(Also known as the “TIA Vision Test” !)



Country Notes for Flatbreads

UK:

- * Mainly Asian flat breads e.g. Naan and Chapati (over 3M people Indo-Pakistani decent)
- * Pita 2nd most popular flat bread, tho Arabic origin is eaten by many Ethnicities in UK
- * Although Latino community in the UK is very small, Mexican foodservice outlets becoming increasingly popular. Hence, tortilla sales rapidly rising. Estimated tortilla sales 10-20% of total flat bread in the UK.

FRANCE:

- * Tortillas mainly sold within a meal product, with a much smaller portion being sold alone.
- * Tortillas account for 40% of flat bread market volume with 60% other flat breads mainly pita

ITALY

- * “Piadina” usually made with flour, lard salt and water is 94% of flat bread market
- * Remaining 6% of market is tortillas and other ethnic flat breads.
- * Real tortillas made of corn, sold in ethnic section retailers, quick-serve ethnic
- * Piadina ingredients increasingly questioned by consumers preferring lighter and healthier products.

TURKEY:

- * 90% of Packaged Flat Bread comes from “Lavash”.
- * 95% of Unpackaged Flat Bread comes from what’s called “pide”, basically round pita breads

Country Notes - Continued

GERMANY

- * Flat bread is very small compared to leavened bread
- * Within flat bread tortillas are only one of many variations. (5%-10% of flatbread market)
- * People wanting Mexican cuisine are more likely to go to foodservice

SPAIN:

- * 80% of flatbread sales is comprised by tortillas
- * Trend started to grow from foodservice to become common on grocery retailers' shelves.
 - * Old El Paso the most important branded product within this market although private label also has an important presence in this market. Almost all flatbread is packaged

POLAND:

- * Tortillas account for 80% of total flat bread in Poland.
- * Pita ranks 2nd.

NETHERLANDS

- * No domestic type of flatbread , Tortillas are the most common type of flatbread
- * Estimate that tortillas comprise 70% of the flat bread market in Netherlands.
- * But share of tortillas is declining as Middle Eastern flatbreads becoming more popular



TIA's Role

TORTILLAS – WHAT & WHY

- For Consumers:
 - Tortillas Are a Food Delivery Vehicle
- For Corporations:
 - Tortillas Are a Results Delivery Vehicle

TIA's Role In This Market

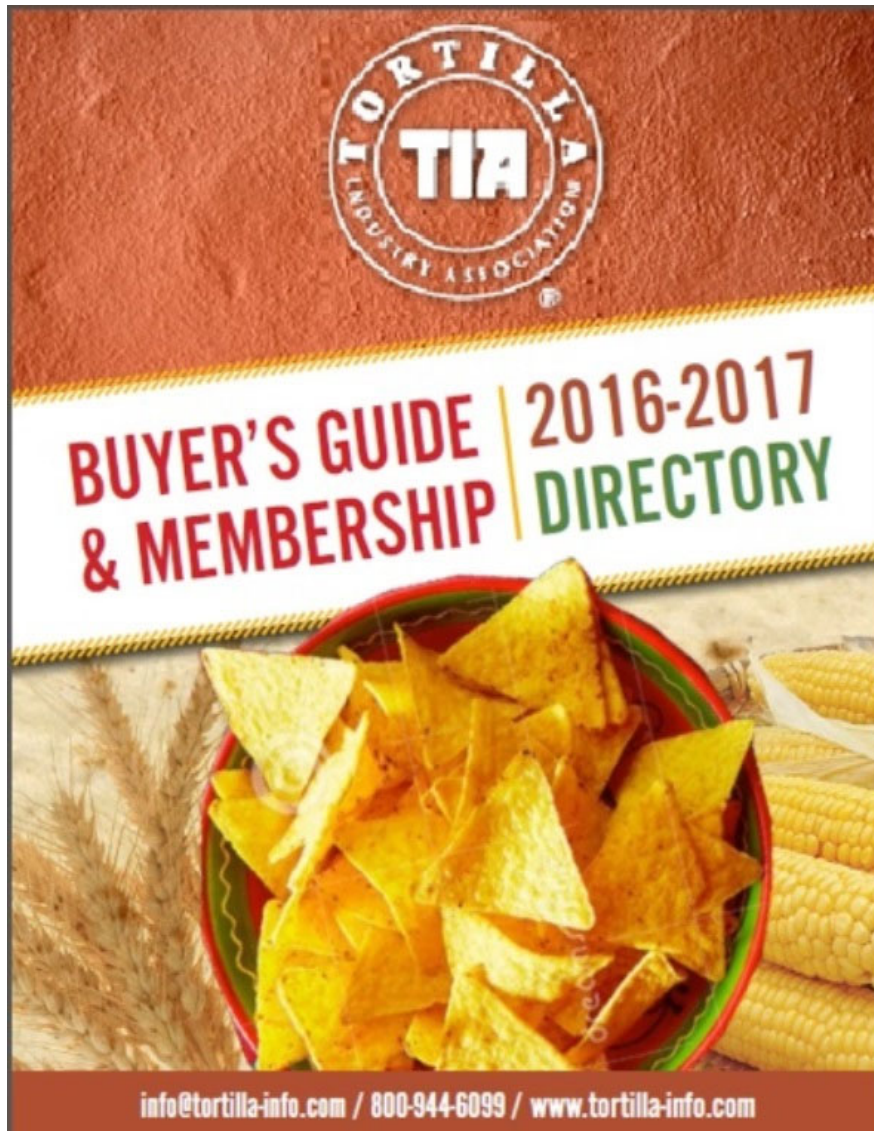
- Expanding Your Business
 - Increased Exposure Between You & Market
- Growing Your Profits
 - Increased Knowledge Of Best Practices
- Increasing Your Success
 - Supporting, Informing & Advocating Our Members

***“Effective Participation In TIA Is
A Revenue-Building Strategy For
Producers And Suppliers Alike In
The Baking Industry”***

TIA's Methods

- Conferences & Conventions
 - **TIA Annual Convention** = Primary Marketplace Of Industry, Next: May 1st – 2nd 2020 Harrahs Southern CA Resort (near San Diego)
 - **TIA Tech Conference** (every 3rd year with IBIE, other years features Factory Tours
Next: Oct 5-6 2020 in Long Beach, CA
 - **TIA Europe**, alternates locations (Barcelona & Amsterdam) with attendees from 18 countries
 - Hands On training classes from time to time

Increasing Business Opportunities



- Buyer's Guide & Membership Directory
- Business Opportunity Notification E-Mails
- Promoting Our Industry Through No-Cost Mass Media Exposure Opportunities

Member Communications

WWW.TORTILLA-INFO.COM

TIA News

TORTILLA
INDUSTRY ASSOCIATION

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Meet The Leaders Who Impact Our Industry ... 7

2011 Technical Seminar
Coming Soon: MAY 22nd – 23rd
"REGISTER NOW!"
Upgraded Location in Anaheim CA, With Sessions Plus Field trips to 3 Facilities

2011 TECHNICAL CONFERENCE

After shifting our Technical Conference last fall to co-locate with the triennial International Baking Industry Exposition 2010 in Las Vegas, NV, TIA is returning this event to its usual spring date. This year it will come to Southern California, at Disney's beautiful Grand Californian hotel.

day of factory tours and training sessions.

The first session runs from 9:15 to 11:15 a.m. and will be presented by Casa Herrera, Pomona, CA. Next, the group will visit a factory hosted by Lawrence Equipment from Noon to 2pm, where they will also be served lunch. The third tour with demos and training sessions of the afternoon runs from 2:45 to 4:45 and will be hosted by J.C. Ford Co., La Habra, CA where beer, snacks and refreshments will be offered.

TIA's Technical Conference focuses on the critical operational issues associated with tortilla and flatbread production and kicks off on Mon May 23rd with a full day of education sessions.

Topics to be presented that day include safe handling of ingredients, preparing for a third-party audits, commodity and ingredient pricing and cost trends, latest formulation, and improving supervisory skills. A working lunch will feature an "ask the experts" open panel, and at the conclusion of the educational sessions, a cocktail reception, featuring tabletop displays from suppliers to the industry, will be held from 5 to 7 p.m.

Then on Tuesday, May 24, conference attendees will board buses beginning at 8 a.m. for a full

Disney's Grand Californian Hotel

TIA always gives attendees ample opportunities to meet and talk with others in the industry. "We want our members to have time to learn from each other's experiences through networking," said Jim Kabbani, TIA's Executive Director. "We also provide an opportunity to learn first-hand the best practices by going on field trips to several facilities."

2011 Spring

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- Electronic Newsletter
– Every Wednesday
- “Ask The Experts”
(Members Only,
Except Today At
Lunch – Fill Out Your
Form!)

TIA Website



www.tortilla-info.com

Launch of TIA's Flatbreads Initiative !



International Flatbread Federation

www.flatbreads.org

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TIA WOULD LIKE TO SAY

Thank You!

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