

# TIA



**September 17<sup>th</sup> – 18<sup>th</sup>**

**2022**

**Las Vegas, NV**

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# Presentation Agenda

- Details of Today's Events
- The US Tortilla Market
- TIA's Role In Promoting Your Success

Your First TIA Event?

**PLEASE RAISE YOUR  
HAND!**

# LOCATION MAP

## LEVEL 3



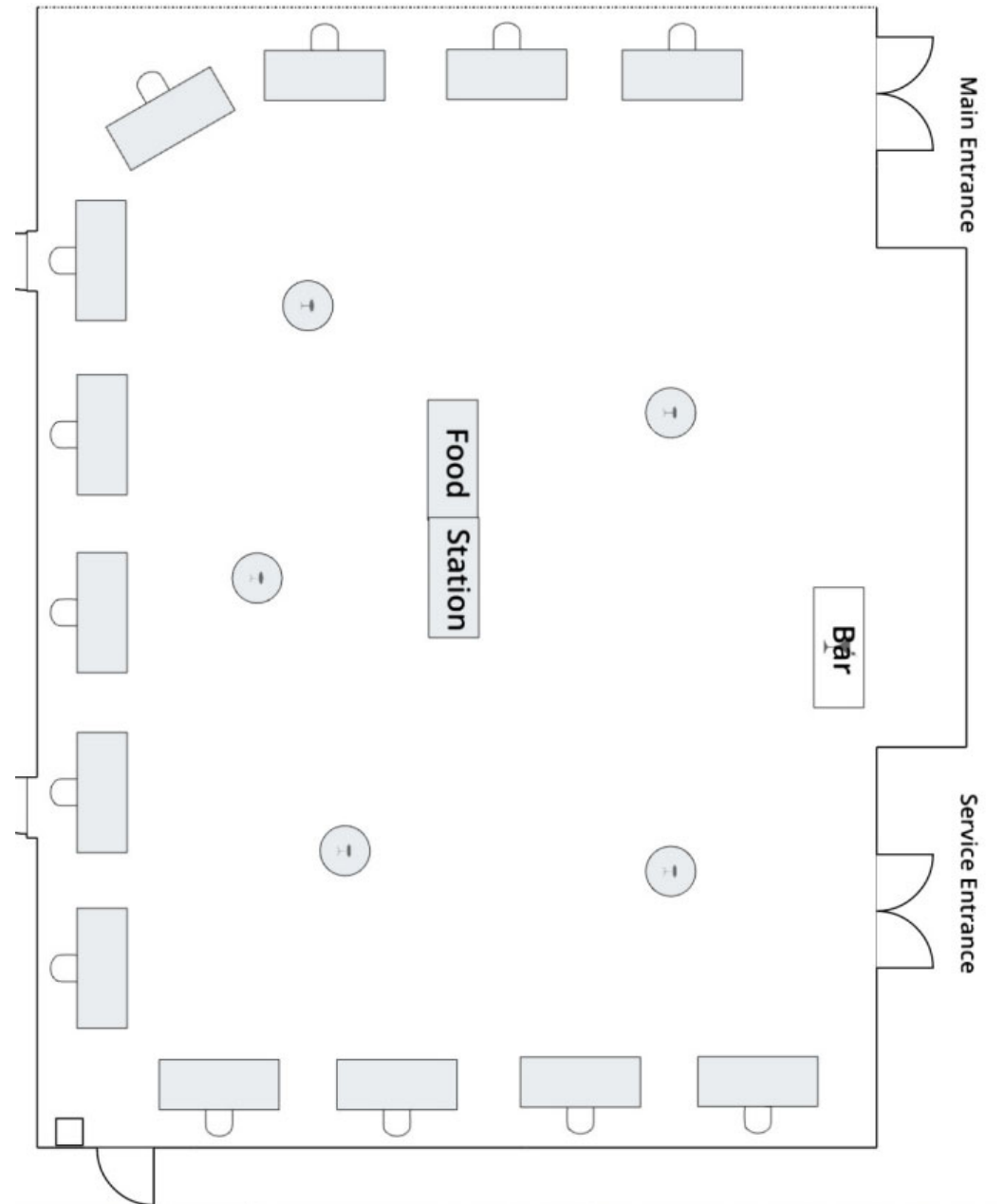
- RESTROOMS
- STAIRS
- ESCALATORS
- ELEVATOR

MAP IS NOT TO SCALE

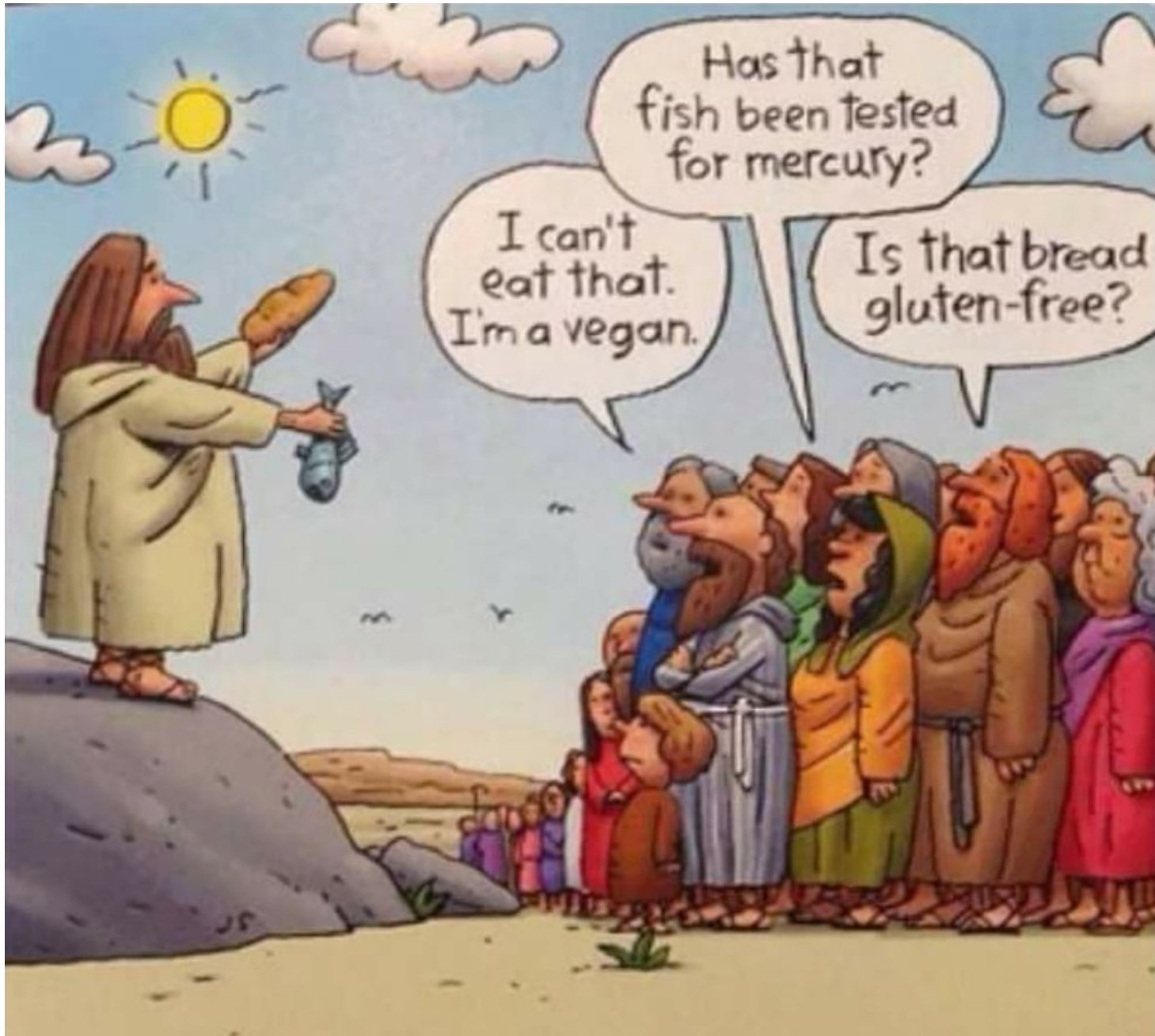
# Tabletop Reception 2022

## List of Tabletop Exhibitors

AB Mauri  
AFC  
Allied Blending LC  
Azteca  
Buhler  
Bunge  
Caldic  
Casa Herrera  
Grain Craft  
Heat & Control  
JC Ford  
Lawrence Equip  
Minsa  
National Stabilizers  
Inc  
QualiTech  
Rovey Seed  
Stern Ingredients  
Stratas Foods  
Vicam



Our Members Face Increasingly Demanding Environment  
**If Jesus Tried To Feed The 5000 Today...!**



# Sharing Latest Scientific Research







## TIA Tech Conference 2022 with IBIE - Education Agenda

### DAY 1 - Saturday Sept 17th

		TOPIC	SPEAKER NAME
8:30 - 9:00		Opening Session: Program Overview & Market Update	Jim Kabbani
9:00 - 9:50	1	Supply Chain Risk Management	Ted Nelson, StoneX Financial Inc. – FCM Division
10:00-10:50	2	Plastics, Carbon Reduction and Sustainability	Viktoria Pakhnyuk, PhD, and Jesse Garcia - Kwik Lok
11:00 - 11:50	3	Equipment Safety & Inspection	Raul Valdez, Casa Herrera
12:00 - 1:00		Working Lunch: "Ask The Experts" Panel	PANEL
1:00 - 1:50	4	Labor Saving through Automation Strategies	Josh Becker, ULMA Harpak
2:00 - 2:50	5	Innovative Solutions for Corn Tortillas & Chips	Nicolas Charalampidis, Stern Ingredients Mexico
3:00 - 3:50	6	Latest Developments in Enzymes & Fibers	Colleen Zammer BSM & Sophia Leung, Enzyme Innovation
4:00 - 4:50	7	Troubleshooting Tortillas	Steve Bright, La Chiquita
5:00 - 7:00		Cocktails & Tabletops Reception	

### DAY 2 - Sunday Sept 18th

		TOPIC	SPEAKER NAME
8:30 - 9:15	8	Latest Scientific Research on Tortillas	Dr Hikmet Boyacioglu, KPM Analytics
9:15-10:00	9	Clean Label Formulation Challenges & Shelf Life	Gokila Thangavel, Kemin Ingredients
10:00-10:45	10	What You Need To Know about Alternative Flours	Nick Ahrens, Bay State Milling
10:45-11:30	11	Negotiating Successful Comanufacturing Relationships	Joe Riley, SnackCraft

(Details Subject To Change)

# By Congressional Resolution September Became 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

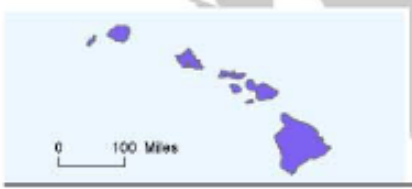
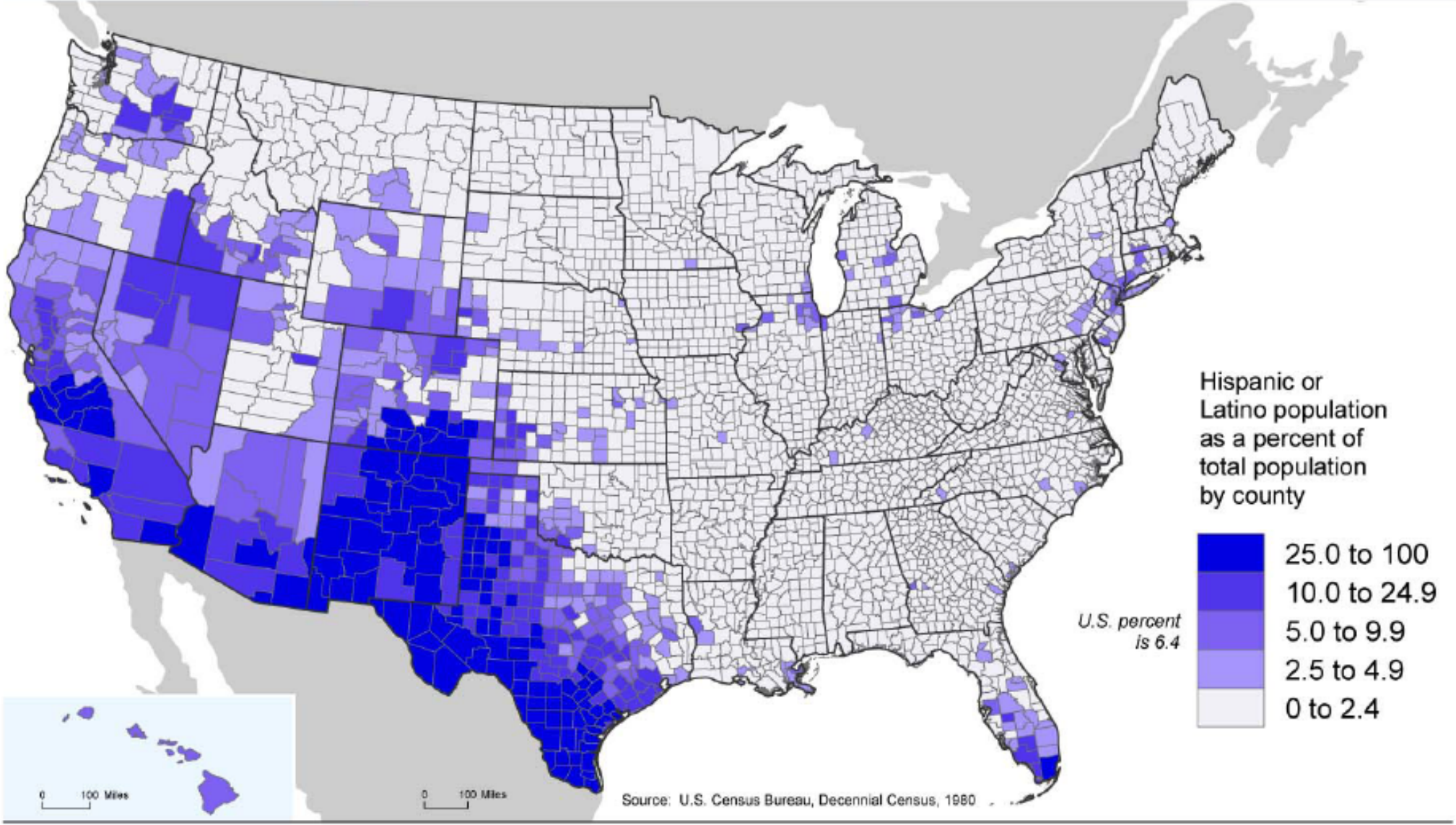
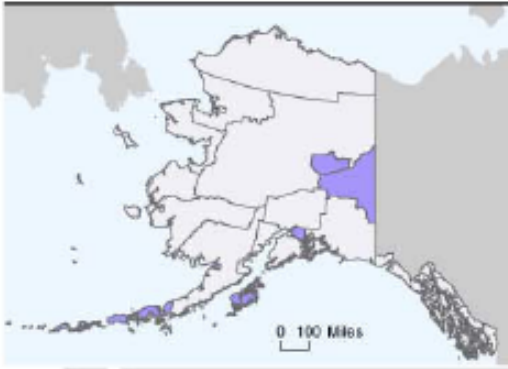
June 23, 2008

# Learning From Each Other






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

# Demographic Market Drivers

# Percent of Population 1980 Hispanic or Latino



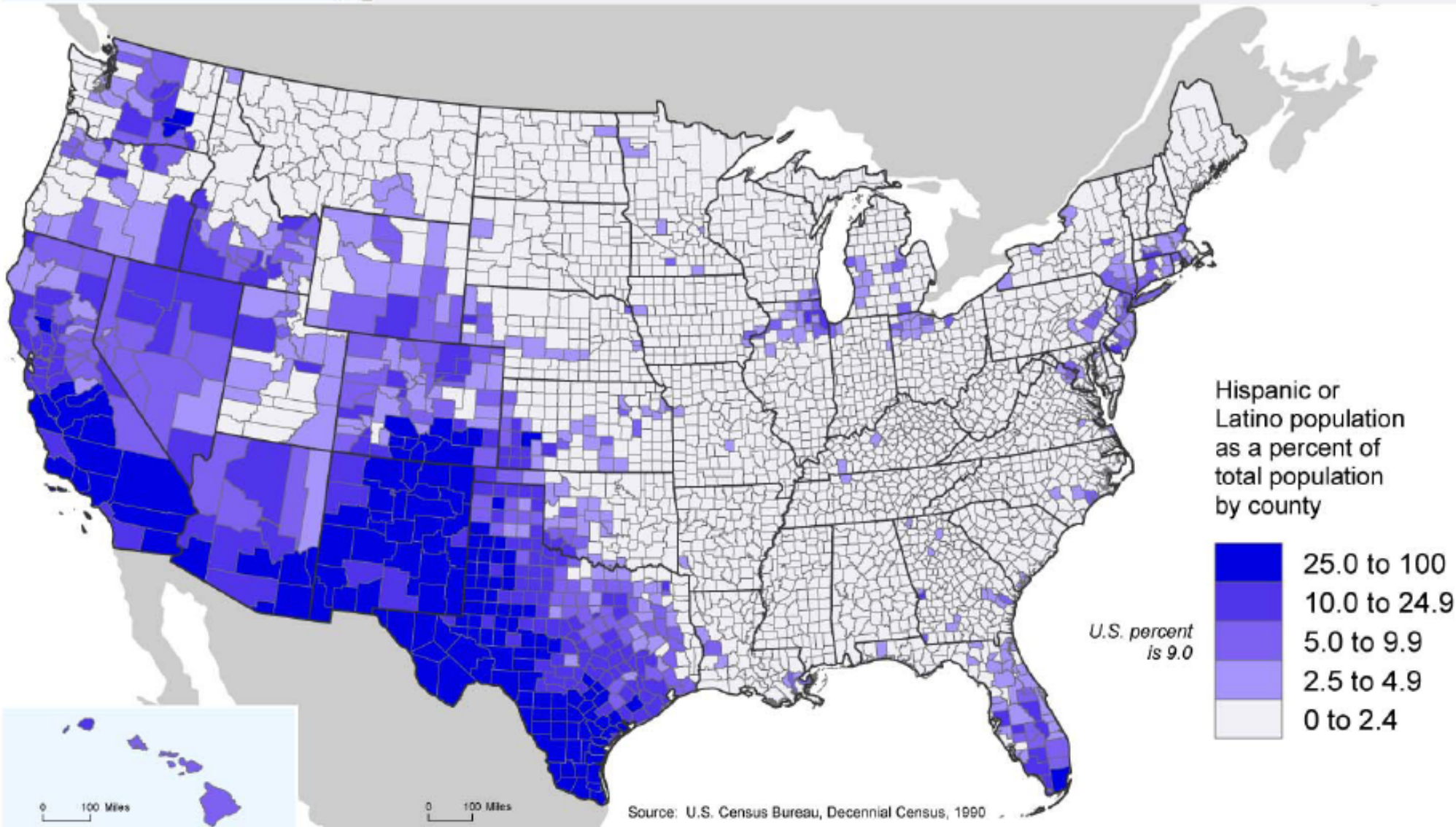
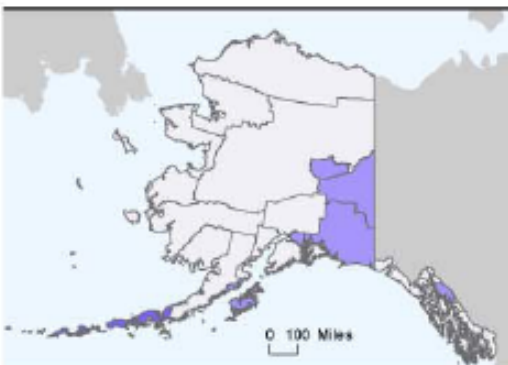
Hispanic or Latino population as a percent of total population by county

	25.0 to 100
	10.0 to 24.9
	5.0 to 9.9
	2.5 to 4.9
	0 to 2.4

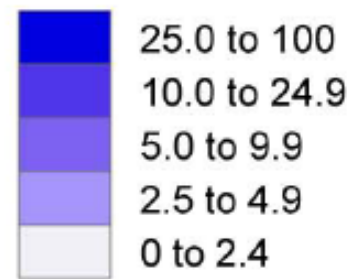
*U.S. percent is 6.4*

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

# Percent of Population 1990 Hispanic or Latino



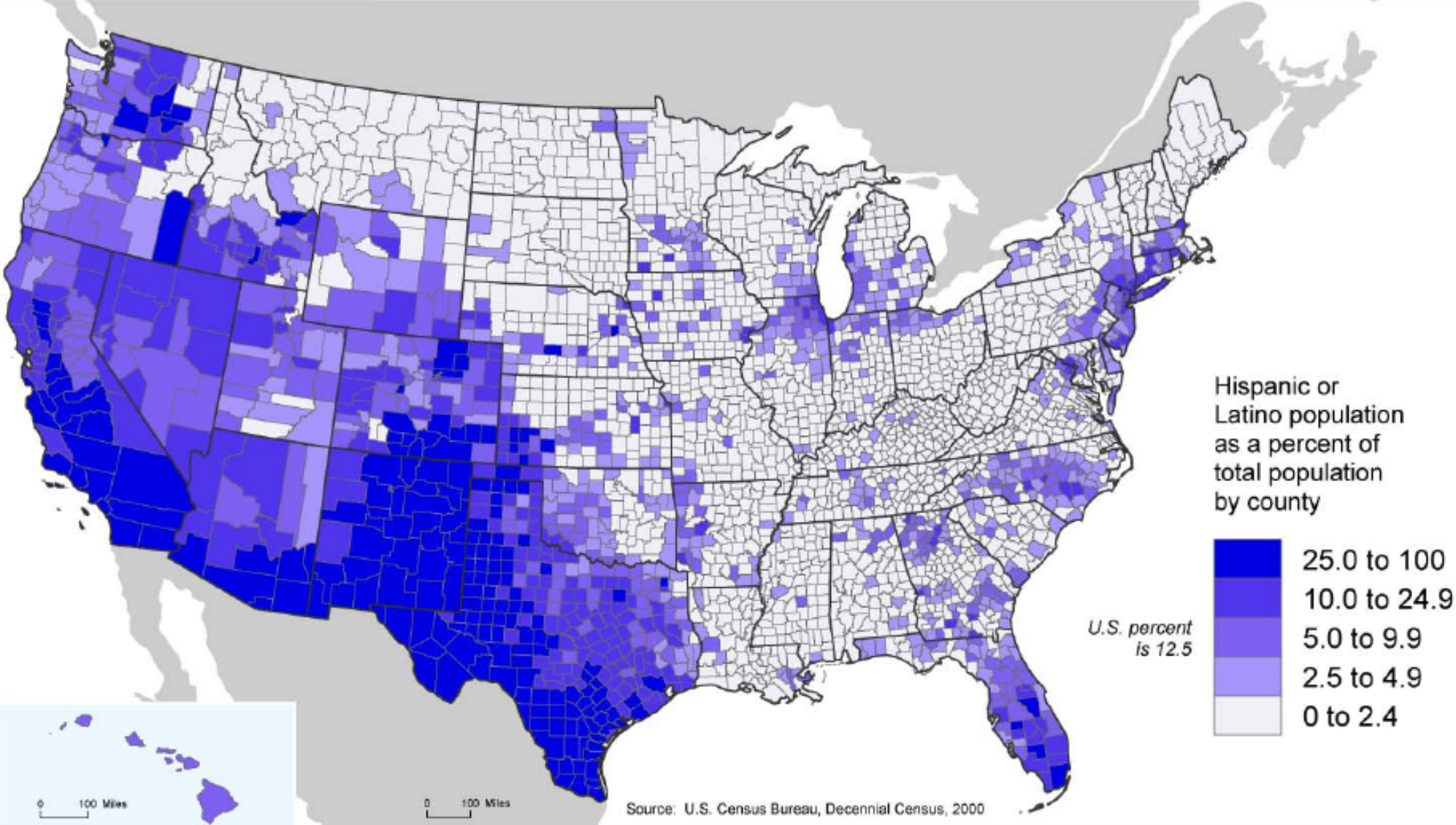
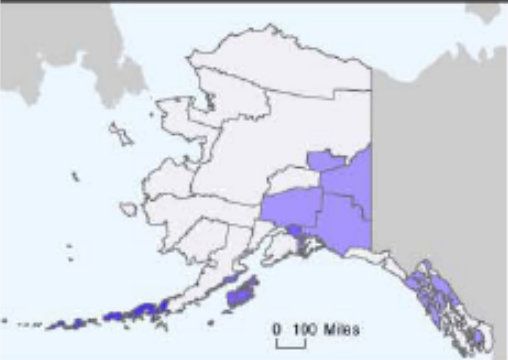
Hispanic or Latino population as a percent of total population by county



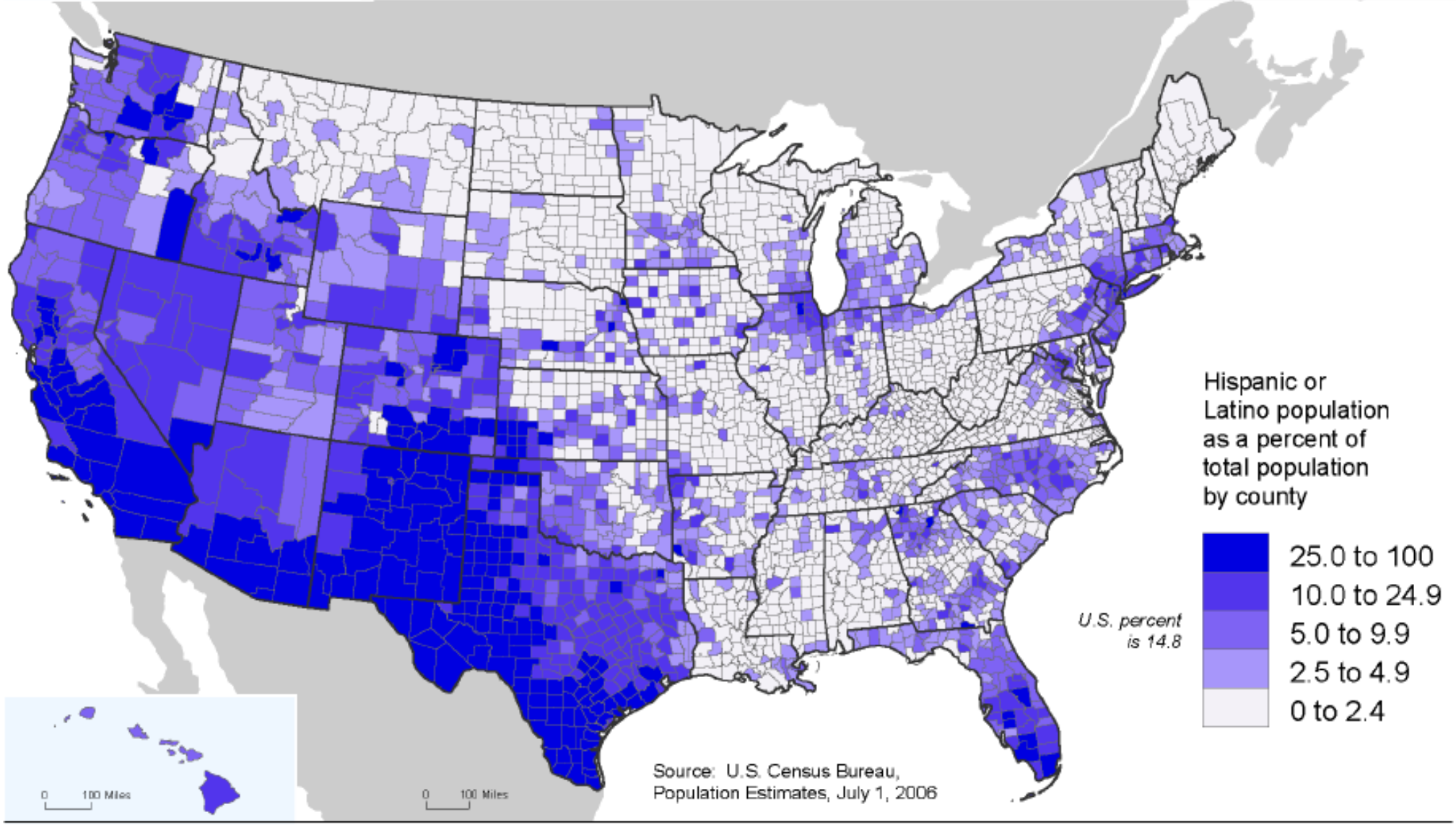
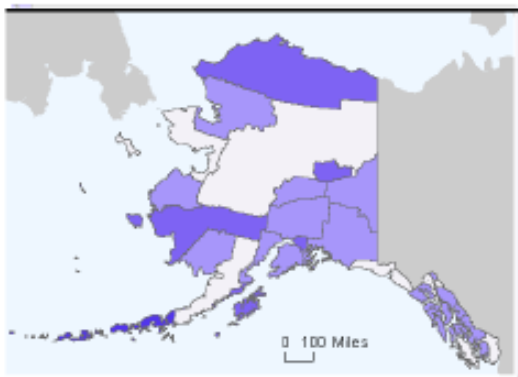
*U.S. percent is 9.0*

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

# Percent of Population 2000 Hispanic or Latino



# Percent of Population 2006 Hispanic or Latino

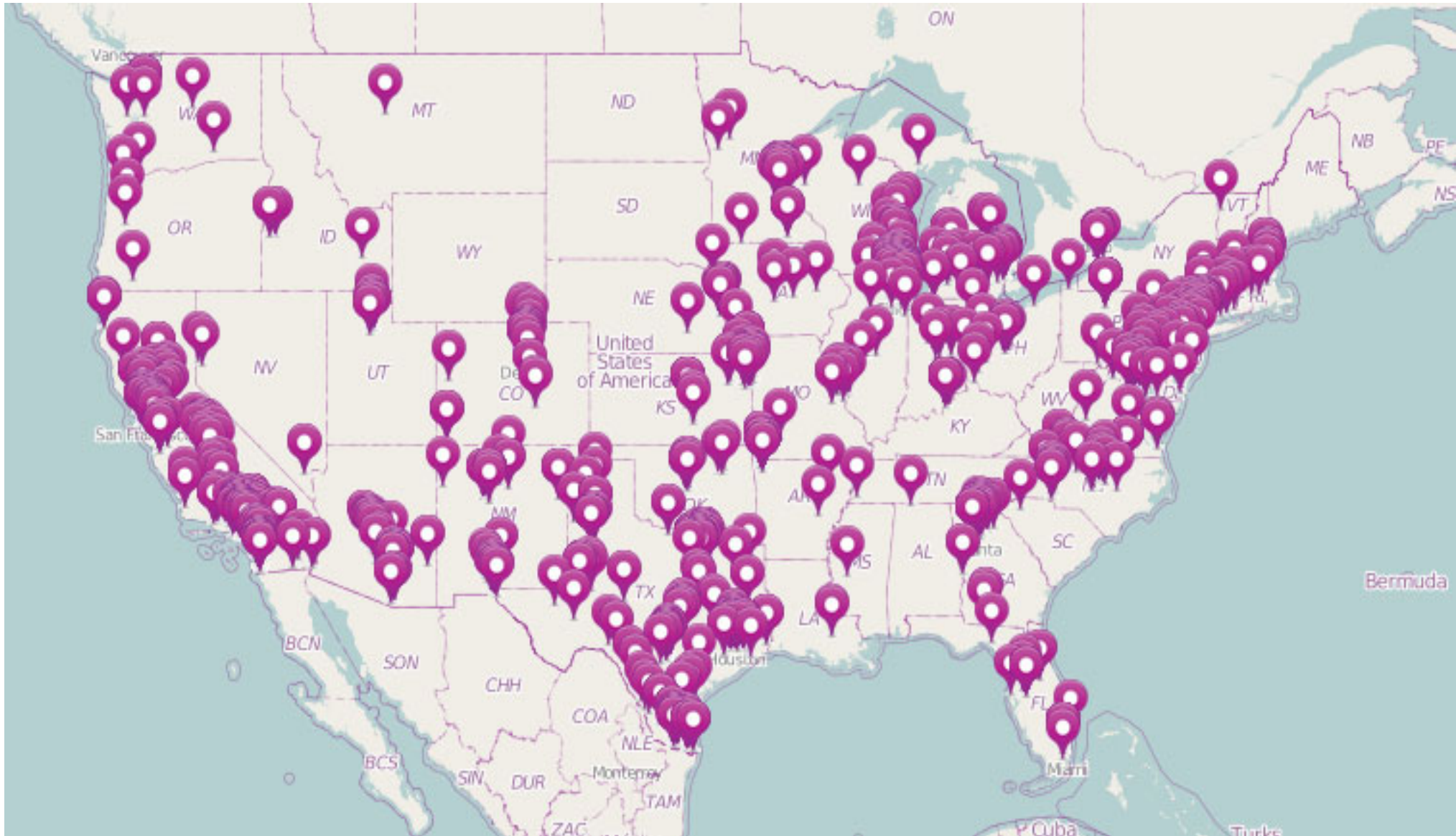


Source: U.S. Census Bureau,  
Population Estimates, July 1, 2006





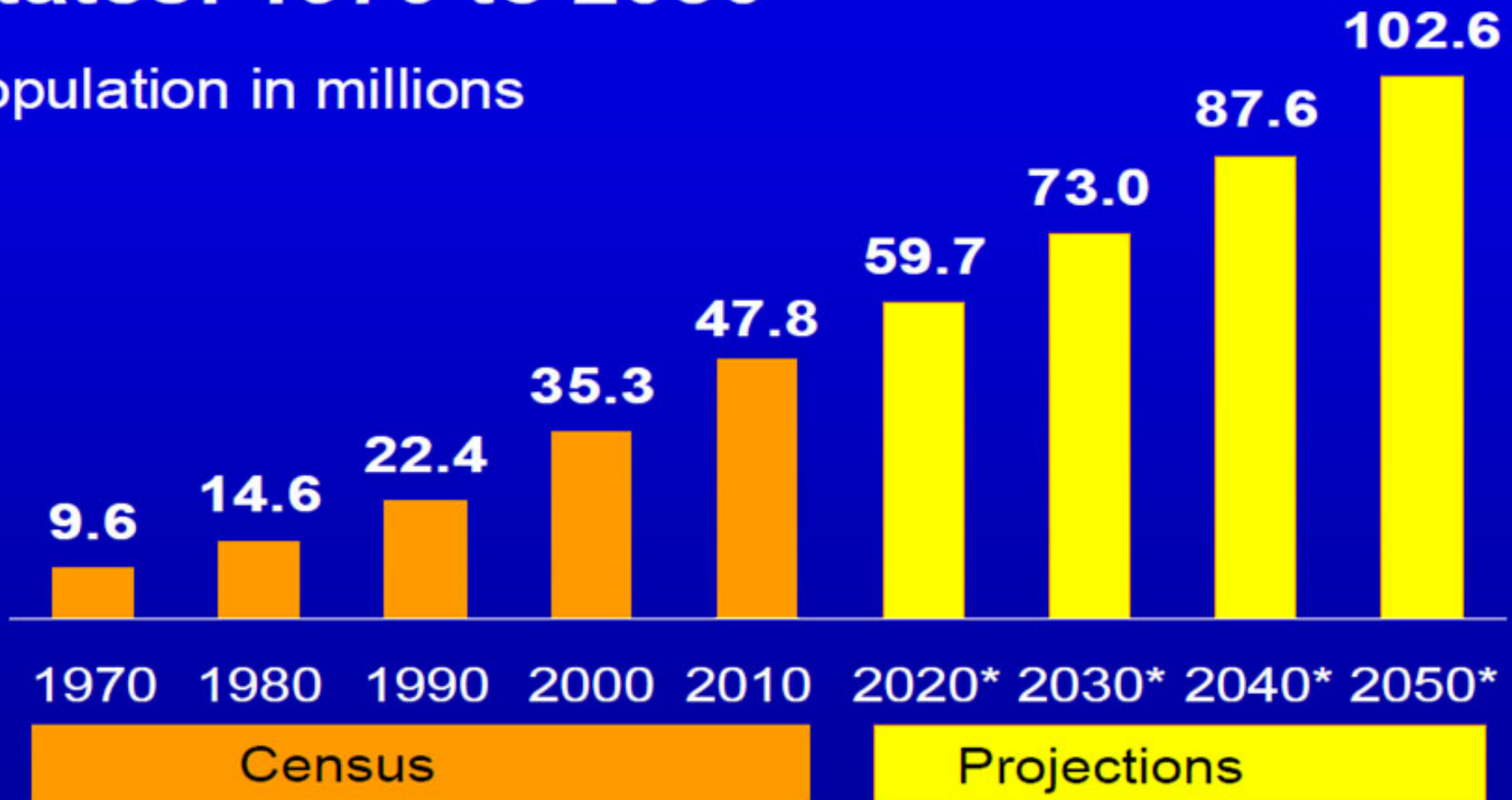
# Continental U.S. Tortilla Plants



# THE DEMOGRAPHIC DRIVER of U.S. TORTILLA SALES

## Hispanic Population in the United States: 1970 to 2050

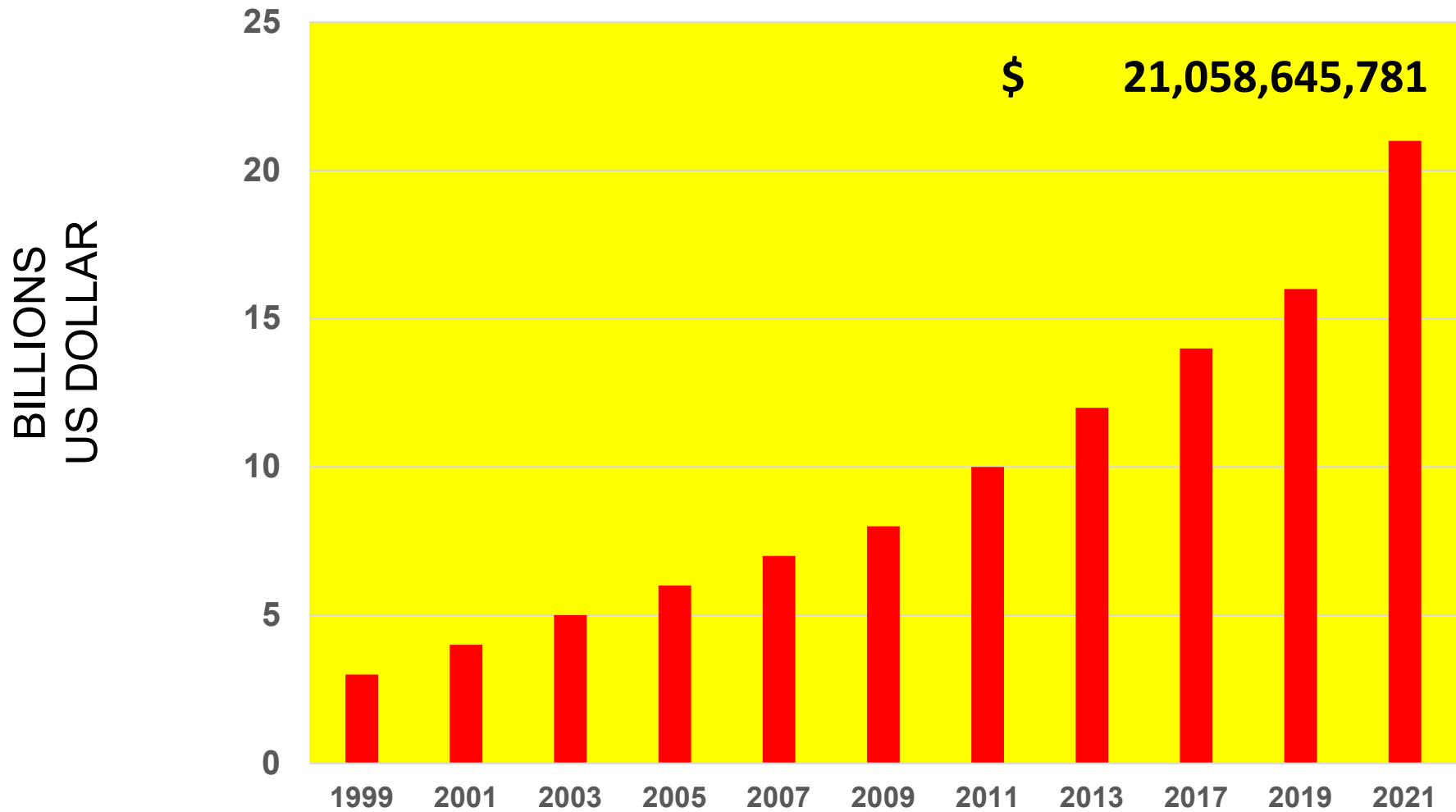
Population in millions



\*Projected Population as of July 1

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

# 2021 Total 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 2021 = \$21 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

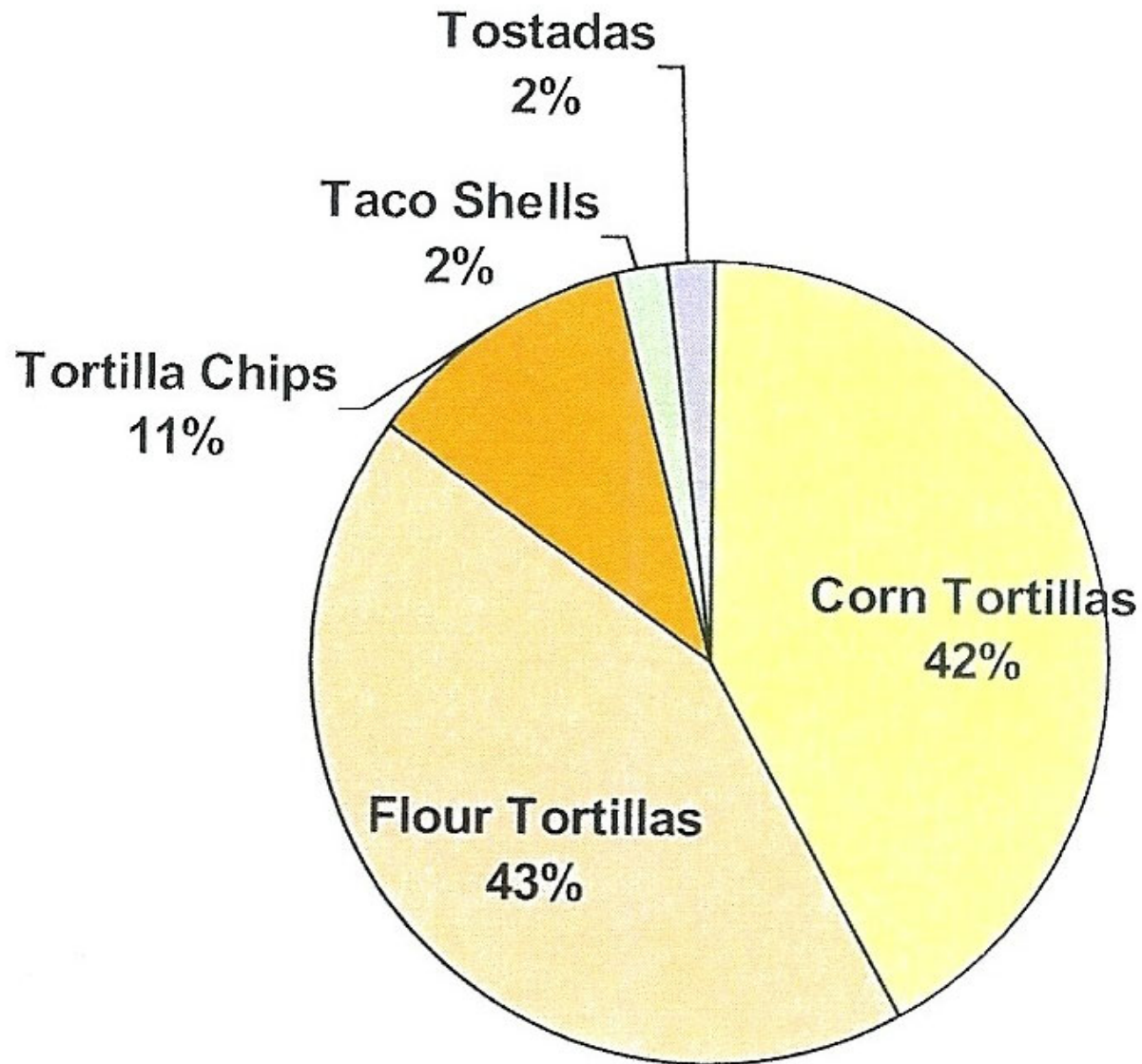
# TRACKING METHODS

- 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

# 2021 In US Dollars – By Type

Tostadas	2%	\$ 421,172,915
Taco Shells	2%	\$ 421,172,915
Tortilla Chips	11%	\$ 2,316,451,035
Flour Tortillas	43%	\$ 9,055,217,685
Corn Tortillas	42%	\$ 8,844,631,228
	100%	

# 2021 Product Types & Share



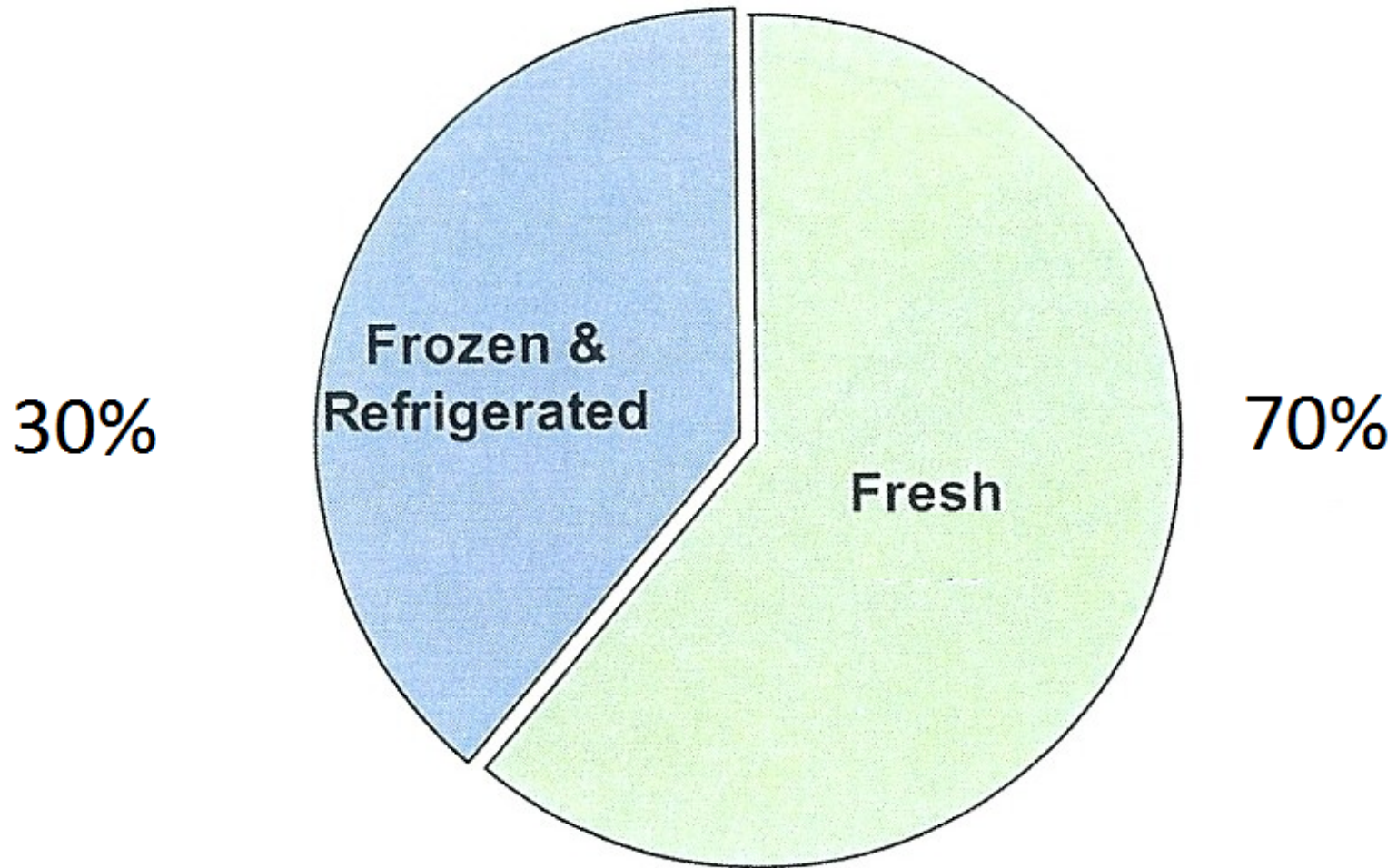


# 2021 Fresh Vs Frozen – Dollars

Fresh	70%	\$ 14,741,052,046
Frozen / Refrigerated	30%	\$ 6,317,593,734
	100%	

# Fresh Vs. Frozen / Refrigerated

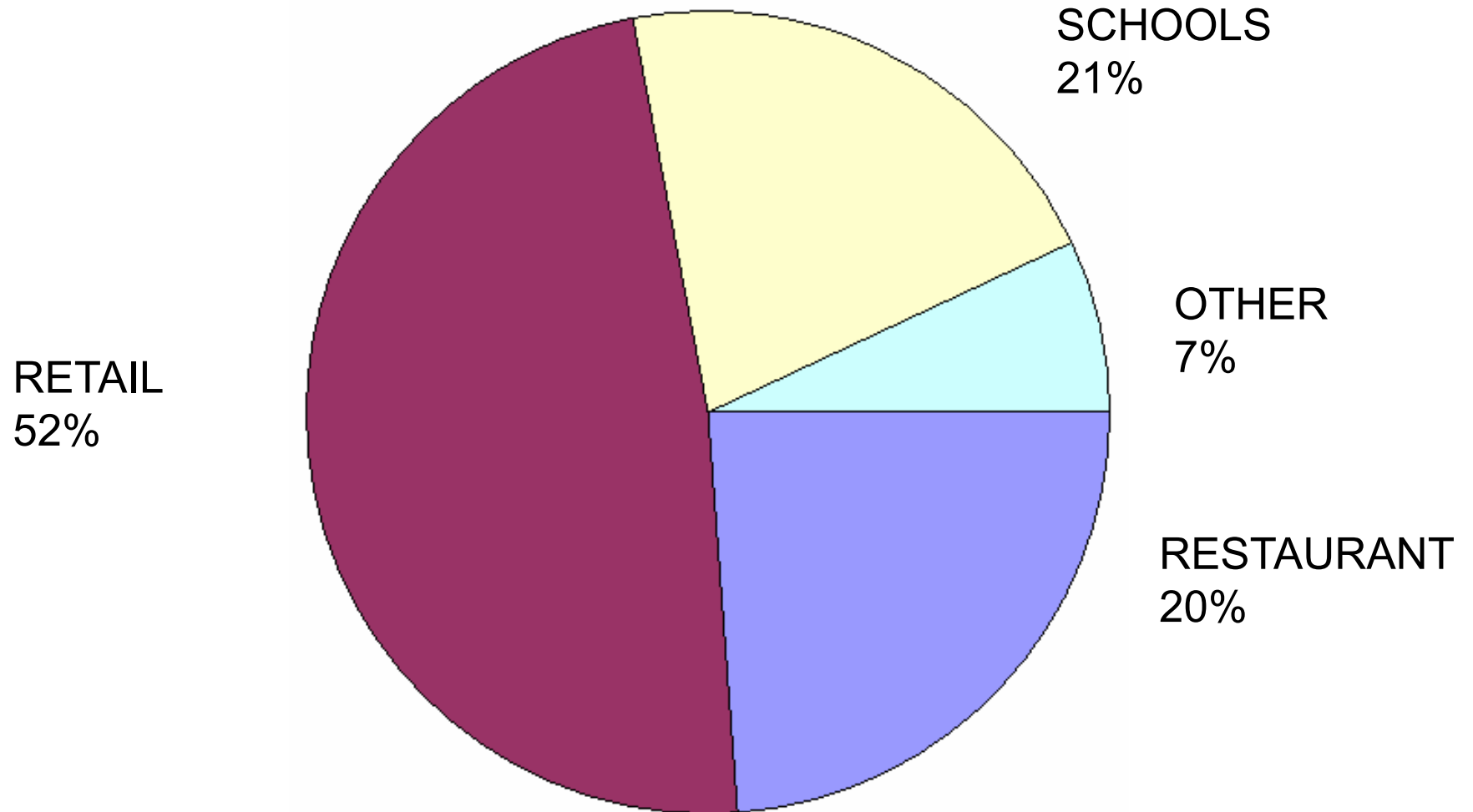
## 2021



# 2021 By Purchaser - In Dollars

<b>Retail</b>	<b>52%</b>	<b>\$ 10,950,495,806</b>
<b>Restaurant</b>	<b>20%</b>	<b>\$ 4,211,729,156</b>
<b>Schools &amp; Govt Institutions</b>	<b>21%</b>	<b>\$ 4,422,315,614</b>
<b>Other</b>	<b>7%</b>	<b>\$ 1,474,105,204</b>
	<b>100%</b>	

# 2021 Sales By Purchaser

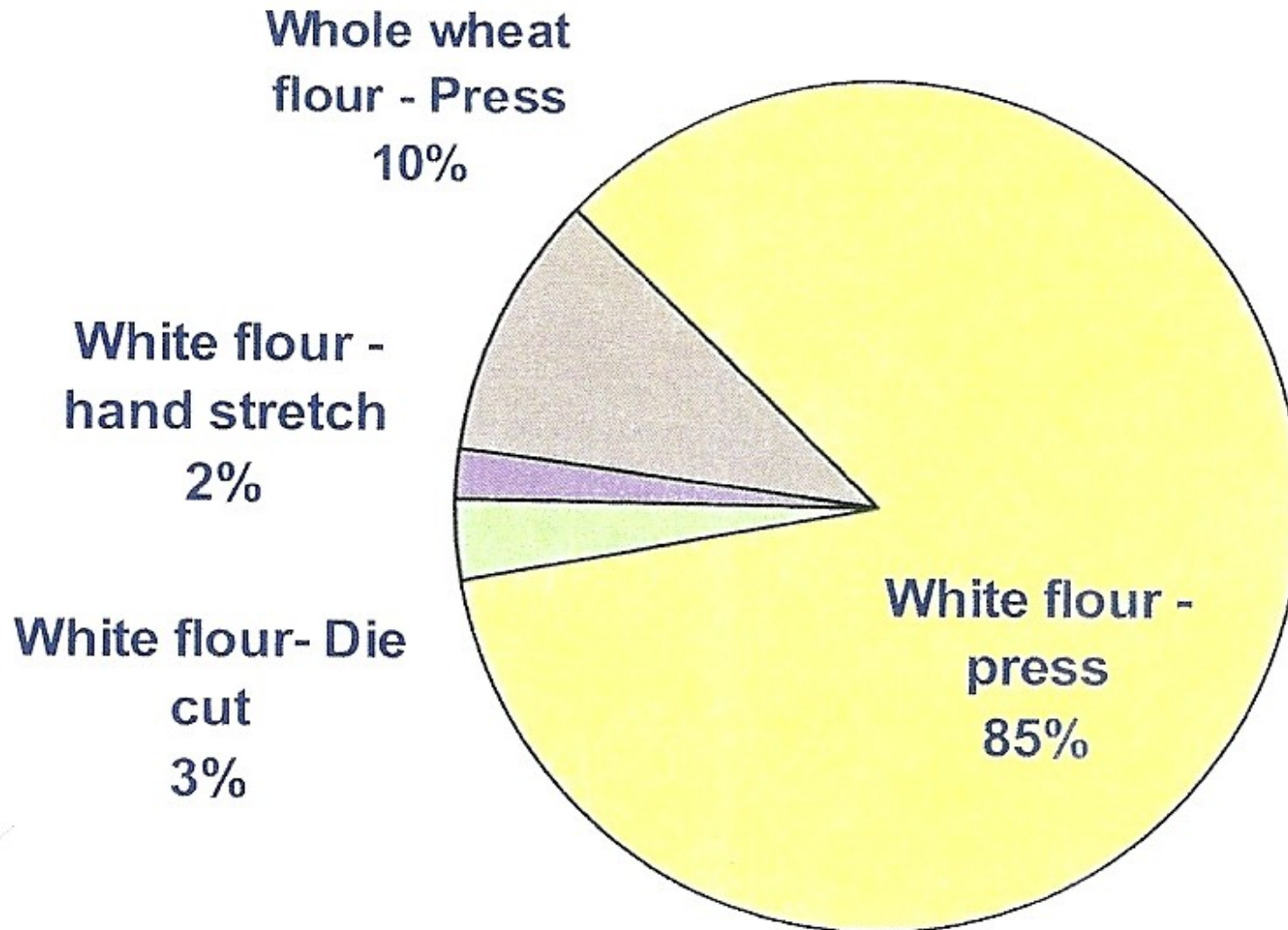


Includes IRI Data

# 2021 Flour Tortillas – In Dollars

<b>White flour - Press</b>	85%	<b>\$ 17,899,848,914</b>
<b>White flour - Hand Stretch</b>	2%	<b>\$ 421,172,915</b>
<b>White flour - Die Cut</b>	3%	<b>\$ 631,759,373</b>
<b>Whole Wheat - Press</b>	10%	<b>\$ 2,105,864,578</b>
<b>TOTAL</b>	<b>100%</b>	

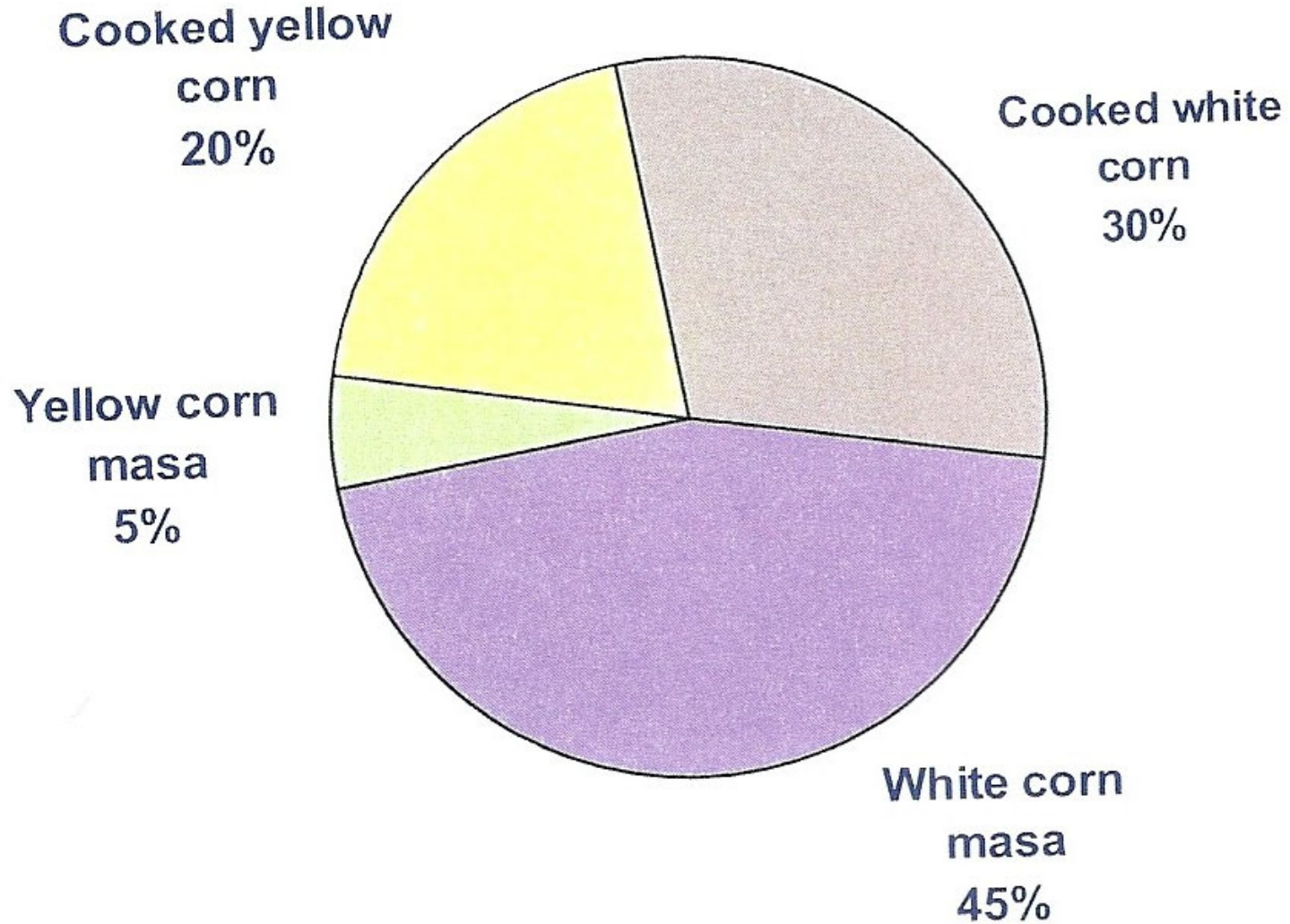
# 2021 Flour Tortillas



# 2021 Corn Tortillas – In Dollars

Masa - White Corn	45%	\$ 9,476,390,601
Masa - Yellow Corn	5%	\$ 1,052,932,289
Cooked - White Corn	30%	\$ 6,317,593,734
Cooked - Yellow Corn	20%	\$ 4,211,729,156
TOTAL	100%	

# 2021 Corn Tortillas

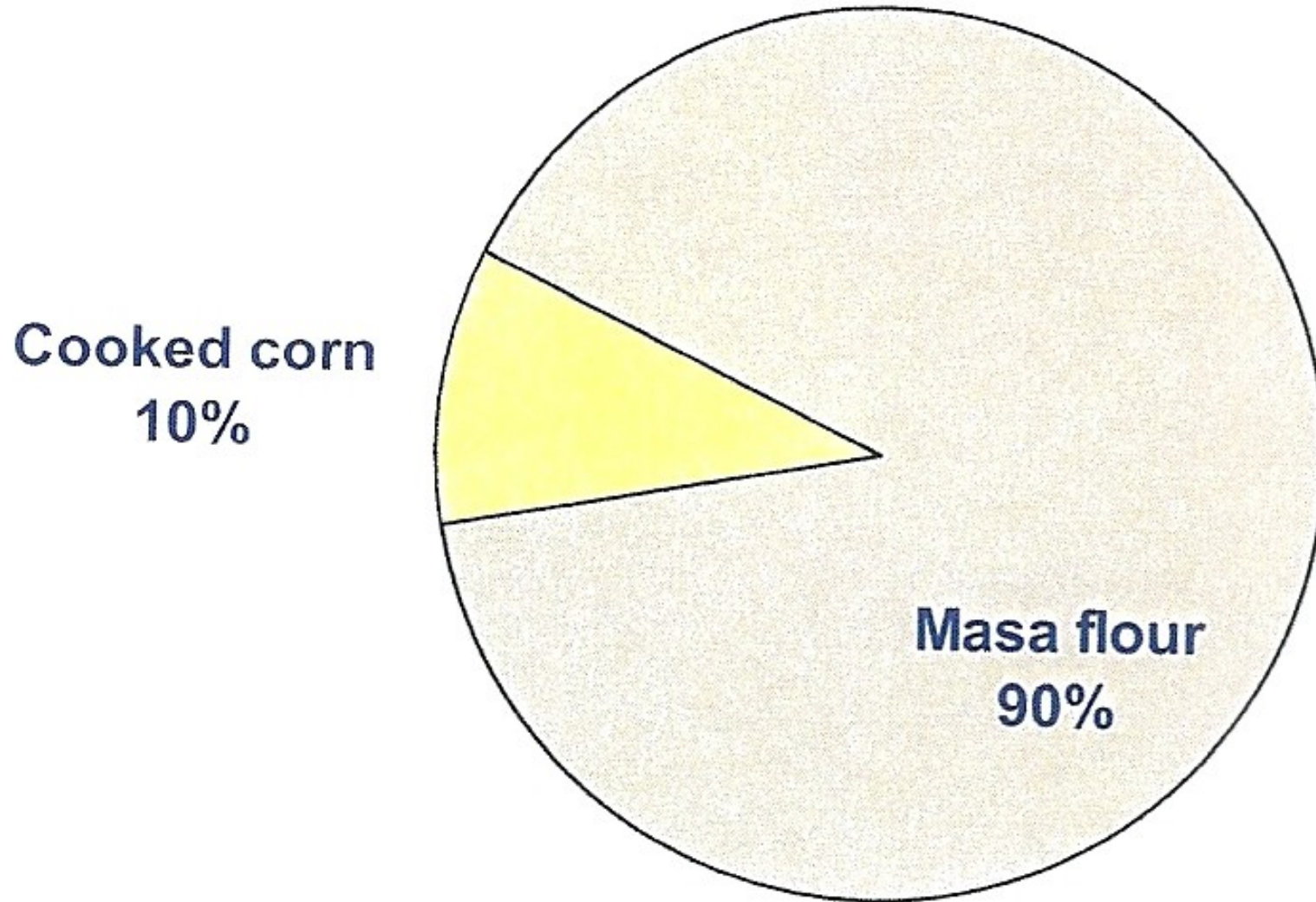




# 2021 Tortilla Chips – In Dollars

<b>Masa Flour</b>	<b>90%</b>	<b>\$ 4,084,805,932</b>
<b>Cooked Corn</b>	<b>10%</b>	<b>\$ 1,231,645,103</b>
	<b>100%</b>	

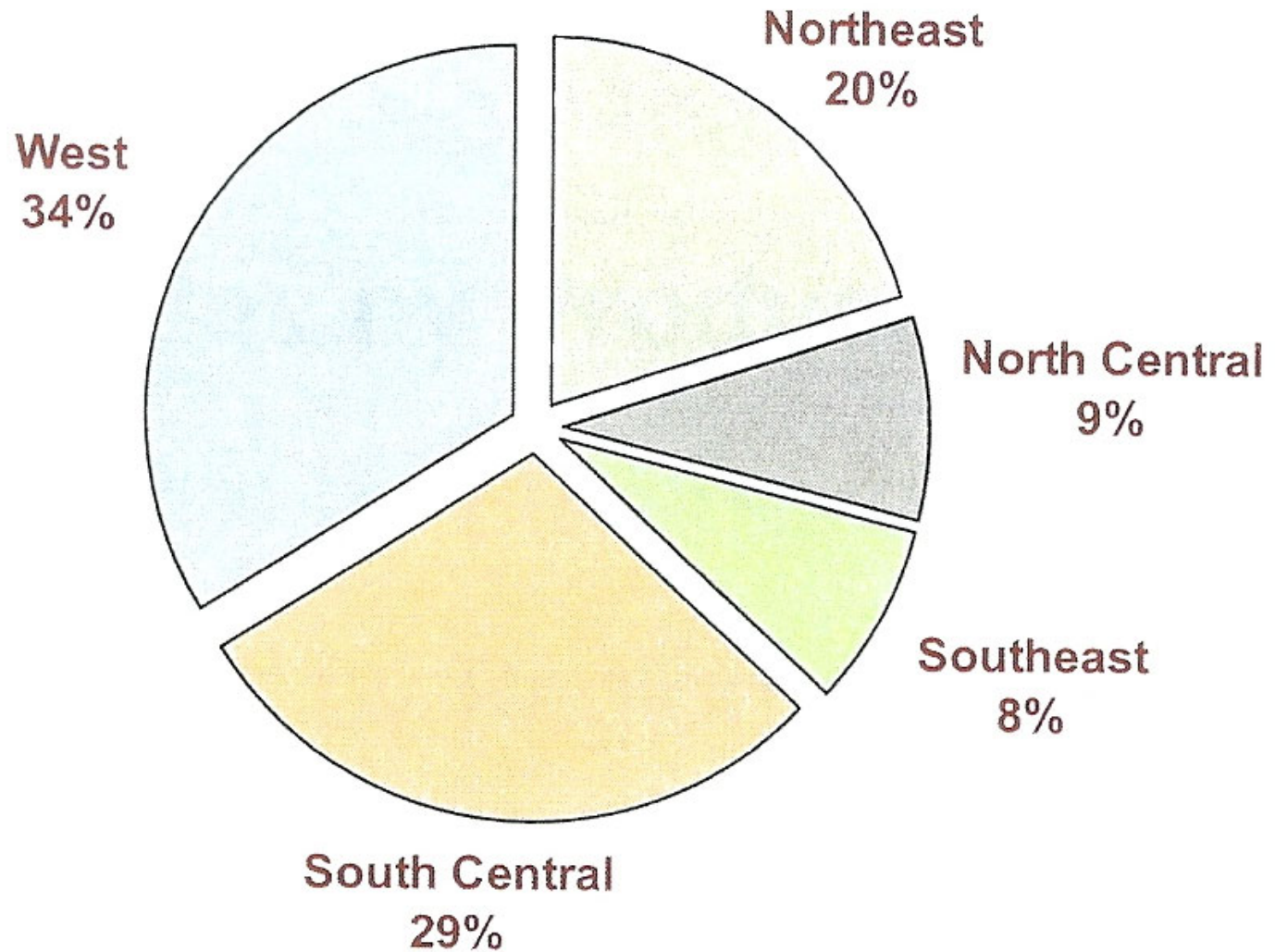
# 2021 Tortilla Chips



# 2021 US Region – In Dollars

<b>West</b>	<b>34%</b>	<b>\$ 7,159,939,566</b>
<b>South Central</b>	<b>29%</b>	<b>\$ 6,107,007,277</b>
<b>NorthEast</b>	<b>20%</b>	<b>\$ 4,211,729,156</b>
<b>North Central</b>	<b>9%</b>	<b>\$ 1,895,278,120</b>
<b>South East</b>	<b>8%</b>	<b>\$ 1,684,691,663</b>
	<b>100%</b>	

# 2021 By US Region



# 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**

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

*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



# 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 1<sup>st</sup> – 2<sup>nd</sup> Kalahari Resort in Austin TX
  - **TIA Tech Conference** (every 3<sup>rd</sup> year with IBIE, other years features Factory Tours  
Next Year: Nov 14-15 in Tampa FL
  - **TIA Europe**, October 25-26 of 2022 in Aarhus, Denmark with Factory Tours (attendees from 18 countries)

# 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

**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**

**Inside**

- Tech Seminar Agenda ... 2
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**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

**TORTILLA INDUSTRY ASSOCIATION**

Español  
Members Only  
Contact TIA

About Us | TIA Membership | Resources | TIA Media Room | TIA Company Directory

Seminars & Conferences

**ROVEY SEED CO.**  
QUALITY, CONSISTENCY, AND PEACE OF MIND

**Links**

\*\*\* WINNERS SELECTED \*\*\*  
See Tech Seminar Program  
**Search For Better Tortilla Tech**  
**\$1,000 Prize + Speaking Slot**

Like us on Facebook

**\* NOTE\***

**TIA's NEW ADDRESS & PHONE NUMBERS**

**1600 Wilson Blvd, Suite 650  
Arlington, VA 22209**

**Join**

**HOW** to become a Member of TIA? [Click here](#)

**WHO** are TIA's Members? [Click here](#)

Member Benefits info [Click here](#)

**"GET LISTED & BE FOUND"**  
TIA Buyer's Guide & Membership Directory  
**2014 Edition**

Directory Advertising Info [Click Here](#)

**Events**

**2013 TIA Tech Seminar**  
**OCTOBER 5th-6th**

**Co-Located with IBIE, Las Vegas Convention Ctr**

**REGISTRATION NOW OPEN!**

MAY 2013 OCTOBER

www.tortilla-info.com

# Launch of TIA's Flatbreads Initiative !



International Flatbread Federation

[www.flatbreads.org](http://www.flatbreads.org)

# Join TIA Today!

- Dues Are Tax Deductible in Many Countries
- Support The Industry That Feeds You
- Be Supported By YOUR Association
- Make Valuable New Business Connections
- Have Fun!
- Help Guide TIA As A Board Member or Committee Member

TIA WOULD LIKE TO SAY

Thank You!

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