



2024 Annual Report
and list of Members



Chairman's Foreword

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Welcome

to the Federation of Bakers Annual Report and List of Members 2024.



It is incumbent on us, the Federation, to focus on the challenges ahead in order to secure the long-term prosperity of the bakery sector. We must support the industry and its supply chain to deliver on environmental sustainability goals.

I am very proud of the UK's resilient bakery industry - which produces millions of loaves and bakery products every day, that are feeding families across the nation. It is the single largest food manufacturing sector in the UK and is at the centre of providing food security for all.

We also need to take a medium and long term view of the future workforce, and attracting employees into our industry. The Federation has refocused discussions on how to address the role of apprenticeships, higher education, training and learning development, and creating careers and pathways for future bakers.

“I am very proud of the UK's resilient bakery industry - which produces millions of loaves and bakery products every day, that are feeding families across the nation. It is one of the largest food manufacturing sector in the UK, and is at the centre of providing food security for all.”

Which is why I was so delighted to see the Federation continuing to grow in 2023 with the addition of new member Grupo Bimbo UK and returning member Allied Bakeries. These new members enable us to be stronger in the delivery of our activities and committees, as well as present as a single and aligned industry voice. We also welcomed a number of new Associate members, who each play a vital role in the full supply chain of the bakery industry. Thank you to all members (new and existing) for your support. Our Members Annual Dinner in February was an excellent opportunity to meet everyone in wonderful surroundings, to build those relationships, and again to thank members for their commitment to the Federation of Bakers and the industry.

The Baking Forum Conference in May 2023 in Leeds was a remarkable success with 200 industry delegates coming together to represent the baking industry. My thanks to the speakers, sponsors, and organisers, without whom these events are not possible. It fulfilled the ambition of an event "For the Industry, By the Industry" and delivered a final bonus by supporting the Bakers Benevolent Society with a donation of £20,000 off the back of that success. The feedback and support from delegates and sponsors alike reaffirmed the need for this to be a regular event, so I am delighted the Baking Forum will be back in Leeds in March 2025.

A General Election is looming, so government may look and feel very different, with many current Members of Parliament from both major parties to stand down. Regardless of the outcome, the FoB is ready to represent the interests of large-scale bakers to protect and promote the bakery sector. And finally, a thank you to the Federation of Bakers Team, the committees and members of the Board.

Mike Roberts
Frank Roberts & Sons Ltd
FoB Chairman.

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About the Federation of Bakers

Our purpose

The Federation of Bakers (FoB) is the trade association representing the largest bakeries in the UK, which produce wrapped bread, morning goods, and other bread products.

What we do

Talk and act on behalf of the UK bread and bakery industry in order to promote the important role bakery plays as one of the largest food and drink manufacturing sectors.

Work on behalf of our members to deliver value-added services to their business through a trusted partner relationship.

Create an environment where our members and the wider industry continue to build a sustainable future for bakery.

Build relationships with stakeholders and the Government, to represent the sector's interests, whilst building on our expertise through our industry-wide committees.



A **£5.6 billion** industry*



Over **80,000** people employed in bakery sector**



13 million loaves and bakery goods per day*

*Kantar World Panel - 52 w/e 17th March 2024
** Business Register and Employment Survey 2022 - SIC 10710

Areas of work

We work in collaboration and partnership with external organisations to make an effective and positive difference to our members and the bread and bakery industry.

We provide an impartial environment for members to discuss non-competitive issues affecting the bread and bakery industry.

We consider a wide range of topics that concern the industry, through our specialist committees, operated by experts from our members.

We agree the Federation's position on issues including health and safety; technical matters; and sustainability, to act as the voice of our industry members.

We promote the bakery industry and our members as responsible, professional, progressive, organisations.





My first thought when I joined the Federation back in April 2022 was that the industry feels like one big family – which is always here to support one another. With the addition of new and returning members, and associate members, I'm proud to see the Federation's bakery 'family' growing stronger each year too. Working together and communicating as one voice, makes us stronger and more effective. Working more closely with organisations within the bakery supply chain also strengthens our knowledge, influence and ability to position the sector as progressive and aligned.

In May 2023, the inaugural Baking Forum in Leeds demonstrated how the bakery industry came together, with two hundred of our colleagues attending. This enabled discussions on some of the key challenges the industry faces including sustainability and apprenticeships. It also provided an excellent networking opportunity.

The foundation and strength of the Federation is built on the work and dedication shown by our committee members, across Technical, Sustainability and Health & Safety. I am also grateful to the Chairman and the Board who provide strategic insights into the issues the industry faces, and guidance to address these challenges. Across all the working groups, addressing the differing issues relating to sustainability continues to be a growing focus. Sharing experiences, learnings and best practice is a key part of ensuring the Federation is working effectively.

Key successes...



Welcomed new full member Grupo Bimbo UK and returning member Allied Bakeries plus associate members Pace, Newsmiths, Applied Computer Vision and Rademaker.



Delivered the inaugural Baking Forum Conference in Leeds May 2023 in association with ABIM.



Hosted the Federation of Bakers 80th Anniversary Dinner January 2023. The Food Standards Agency Executive Board with bakery tour in December 2023 and also hosted the Member's Annual Dinner in February 2024.



Promoted the 'Fibre February' campaign in association with our partners the FDF and UKFM to promote bread as a leading source of fibre in the diet.



Visited eight member sites gaining industry and business insights.

The Bread and Flour Regulations 1998 consultations were finally published by the Government in January this year, and we continue to engage Defra, along with other key stakeholders, to influence the implementation process.

Many of our activities are based on collaboration with industry, associations and colleagues, which is why we have been continuing to work closely with the Food and Drink Federation, UK Flour Millers, Craft Bakers Association and Scottish Bakers, and institutes like Rothamsted Research.

Our close relationship with the Food Standards Agency (FSA) continued with our Technical Committee. Last December, we hosted FSA Chair Professor Susan Jebb and eight members of the FSA Executive Board at Warburtons in Bristol, ahead of an FSA Board Meeting. To share the knowledge, skills and capacity required to bake bread on large-scale production - and put forward the industries challenges and concerns directly, is a key role the Federation plays on behalf of our members.

In February, we hosted our Annual All Members Dinner at the Chesterfield Hotel, London. It was wonderful to see so many of you for an evening of networking, enjoyed by 40 members.

The term Ultra Processed Foods (UPF) is now part of the media language and its (misinformed) association with health of bakery goods was and remains challenging. Protecting the reputation of bread and promoting the role of bakery in a healthy balanced diet has never been so important. We continue to support Fibre February as an event to promote bakery, working with the UK Flour Millers (UKFM) and the Food and Drink Federation (FDF) and to challenge all incorrect articles on bread.

As we plan for the year ahead, the UK's political landscape will undoubtedly present new challenges and opportunities for bakers.

Andrew Pyne
Chief Executive



Board Report

The Board were pleased to welcome Chris Craig, MD of Allied Bakeries and Jon Smythe, MD of Grupo Bimbo UK, in September 2023 as new Board members following their joining as full members to the Federation. The Board is now represented by nine member companies

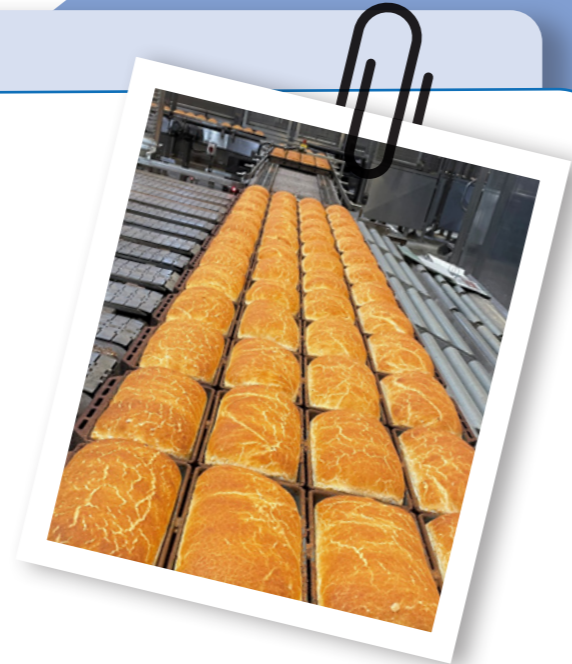
In May the Board meeting hosted Didier Jens, Secretary-General of AIBI (International Association of Plant Bakers) to learn of the work of the European association representing the large-scale bakery industry. The FoB continue to be active members with the association and represent the UK's interests with a seat on the AIBI Board.

A number of topics were forefront of discussion throughout the year. Sustainability in the industry rightly remains a priority, and with an ambition to collaborate as a bakery sector right across the supply chain. The Board also prioritised the work of the Federation on future bakers, investigating the opportunities to work closely with apprenticeships standards, colleges, higher education and collaborate across the bakery sector on a common challenge. In the summer of 2023, the CMA published its report on competition on the grocery sector which investigated 10 food categories including the bread sector. The Board welcomed the findings that highlighted a competitive bread sector represented by both brands and own-label.

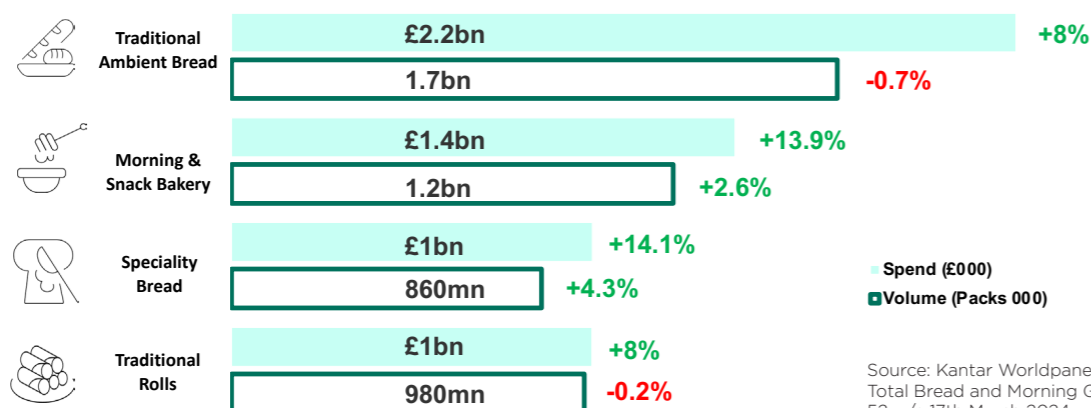
The Board receive regular updates on the important work being led by the Technical, Health & Safety and Sustainability Committees, and welcomed the continued progress.

The Board recognised the ongoing challenges facing the category in relation to reputation of the products, and the increasing debate of the role of processed foods and diet. A research paper was commissioned into the role the Chorleywood Bread Process (CBP) with relation to social, economic and sustainability impacts, in light of the challenges the industry faces.

Following the success of The Baking Forum 2023, the Board unanimously agreed to continue supporting the event and announced the next Baking Forum will be held in March 2025 back in Leeds.



Bread & Morning Goods - Total Spend (£000) and Packs (000) by Segment



Source: Kantar Worldpanel
Total Bread and Morning Goods
52 w/e 17th March 2024

Technical

The Bread and Flour Regulations

We experienced a new set of regulatory challenges in 2023, with the Bread and Flour Regulations (BFR) continuing to be an ongoing high priority topic for members throughout the year. We expected the response to the consultation on the fortification of non-wholemeal flour with folic acid to be published in the summer of 2023. After directly responding to the consultation in November 2022, FoB members were keen to hear this news, however delays meant this was not published until early 2024. With the Statutory Instrument set for October 2024, FoB are aware of the enormities of this task and will support its members in the implementation of folic acid throughout the transition period.

In addition, the FoB collaborated with FDF, UKFM, Defra and BRC to create an industry position on the labelling of 'wholemeal' in relation to '50:50' breads when Article 6 within the BFR was under scrutiny. Following its publication in early 2024, the position was shared with primary authorities and trading standards to confirm the stance of FoB and its members and their interpretation of the regulation.

ABIM Sourdough Code of Practice

At the beginning of 2023, the Association of Bakery Ingredient Manufacturers published their Sourdough Code of Practice (CoP). FoB members played an integral role in creating the CoP and many are successfully utilising it in the manufacturing of sourdough. FoB continues to collaborate with ABIM on the CoP, by regularly feeding into their Sourdough FAQ document and Survey. Both associations are committed to building on their relationship and working together on shared industry efforts where possible.

Ultra-Processed Food

Another high priority topic for the FoB in 2023 was Ultra-Processed Food (UPF). Following the surge in media attention the Technical Committee monitored the latest research and evidence surrounding this topic. One of the main workstreams was to create a position statement on UPFs. The position statement focuses on the importance of processing within the bread industry such as baking, fortification, milling and fermentation. Overall promoting bread as an affordable, readily available, nutritious, and sustainable product.

Government Health Initiatives

The Technical Committee also followed progressions of the UK Governments' health initiatives. This included advances in relation to the Government's Food Strategy, covering the launch the Food Data Transparency Partnership (FDTP) which aimed to create a shift towards the production and sale of healthier foods, produced to a higher animal welfare and environmental standards. Members also reviewed the Action on Salt Report, the new WHO guidelines on the use of non-sugar sweeteners and the WHO updated guidelines on fats and carbohydrates. Several FoB members are also signed up to the FDF Action on Fibre Initiative, where they continue to help 'bridge the gap' between fibre intakes and the dietary recommendation.



Technical (continued)

Contaminants

Another achievement for the Technical Committee was the successful creation of an industry guidance document on opium alkaloids in poppy seeds. Keeping up to date on the UK and EU policy landscape on contaminants relevant to the bakery sector will remain another important topic for the committee to concentrate on. Having a strong relationship with the FSA aids this workstream, which is why the FoB will continue to build on this relationship in 2024.

Data Collection

Members continue to submit data for the FoB annual data collection on salt, sugar and acrylamide. The Committee agree this is an important piece of work that will aid future bread industry efforts such as the Government salt reduction targets 2024 and the upcoming FSA Acrylamide data call which is due summer 2024.

Summary

In conclusion, the Federation of Bakers Technical Committee endeavours to commit to advancing industry standards, navigating regulatory complexities, and promoting the nutritional value and safety of bread, bakery and morning goods. Through collaborative engagement, proactive initiatives, and a dedication to innovation, the Committee continues to uphold its mission of adopting a safe and thriving bakery industry.

AIBI Technical Committee

The International Association of Plant Bakers (AIBI) is the EU counterpart of the FoB. We attend three Technical AIBI Committee meetings per year providing an opportunity to represent the UK voice for the sector.

Ingredients and Contaminants:

During the AIBI Technical Committee for 2023, there have been ongoing discussions within the EU regarding setting levels for acrylamide to address food safety concerns. Monitoring of Mineral Oils, PFAS and BPA contamination, emphasizing proactive measures by manufacturers to mitigate risks. The Committee also saw the adoption of new maximum levels for T2/HT2 and DON in foods, which presents challenges for bakeries in managing these contaminants.

Labelling and EU FIC:

AIBI witnessed diverging views on the new Nutriscore algorithm among EU countries, prompting varied approaches to nutrition labelling. AIBI continue discussions on salt and sugar reduction initiatives, alongside efforts to standardize bread definitions and sourdough standards.

Sustainability and Food Systems:

Also within 2023, AIBI launched their regenerative agriculture project which aims to promote sustainable practices throughout the food chain. The Committee also regularly discussed the progress in eco-labelling and green practices to enhance environmental sustainability.

Health & Safety

The Health & Safety Committee has continued to share best practice within the industry, including risk and solutions with bakery manufacturing. The Federation continues to engage with the Health & Safety Executive (HSE) and the Food and Drink Manufacturers Health & Safety Forum (FDMF) with updates on its five strategic pillars: Ill-health / Injury reduction; Musculoskeletal disorders (MSD); Slips and trips; Occupational health and Wellbeing; and Leadership and Engagement.

The Federation has also continued to collect industry data on health and safety statistics to produce bakery industry data trends. The data, which shows progress is being made in reducing health & safety incidents, highlights that the bakery industry performs favourably in comparison to other manufacturing sectors. It also enables members to benchmark their performance.



Sustainability

Our Sustainability Committee has continued to prioritise issues relating to packaging and food waste, as well as dealing with a number of challenges including the Extended Producer Responsibility (EPR). It has also been building the narrative around the importance of recyclability of plastic packaging in bakery products, and availability of recycled content materials.

The committee was privileged to welcome a number of guests speakers throughout the year including: Bakers Basco; who shared the sustainability credentials of Basco baskets, WRAP; who shared an update on its Food Waste Reduction Roadmap (FWRR) of which the Federation is an Engagement Partner, and the UK Plastics Pact. In addition, the FDF updated members on the FDF sustainability strategy, as well as policy areas on EPR, plastics packaging tax, modulation fees and the new UK Deforestation Regulation.

The Federation has continued to develop an industry position about the work of our members and are collecting industry data on packaging achievements, which will be shared in due course.



Public Relations and LinkedIn Activity

Ceres, FoB's appointed agency, has continued to manage our PR activity to promote the role of bread in the UK diet to consumers and health care professionals. This includes providing daily updates on news relating to bread and bakery in the media and responding to any negative and inaccurate reports.

As part of its ongoing press office activity, Ceres has drafted more than 50 letters to journalists and HCPs regarding their misrepresentation of the nutritional content of wrapped and sliced bread and its value as part of a healthy balanced diet, to ensure they have the correct information. This includes challenging journalists from the Times, Daily Telegraph, Daily Mail and Daily Express regarding articles incorrectly suggesting bread is linked to causing cancer, diabetes and obesity, lacks nutritional value as an ultra-processed food, as well as it being high in salt and sugar. As a result of this work, we have had articles corrected and received apologies from several media.

Ceres has also provided the Federation with support in devising media statements on issues such as the use of the term wholemeal in half and half bread, the energy crisis, the Autumn statement and the Action on Salt Report. It has also issued press releases to the bakery industry trade press about the Federation's new members Allied Bakeries and Grupo Bimbo UK.

The agency's remit has been expanded from April 2024 - and will now include management of a proactive LinkedIn feed that supports FOB's business priorities. The channel will provide space for FOB to reply to inaccurate claims in an open format, have a wider debate about the role of bread, and provides a platform to both address our agenda and support members and associate members' activities.

The Guardian

Daily Mail

DAILY EXPRESS



DAILY Mirror

THE TIMES

The Telegraph



List of Members



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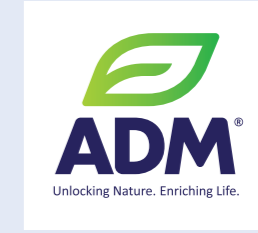
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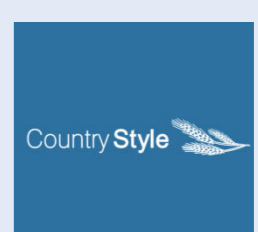
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Please contact the FOB
who will put you directly
in contact with any of
our valued members.

Past Chairmen

| | | | |
|----------------|-------------------------|----------------|-------------------------|
| 1942/46 | S. Brookes | 1973/74 | G. Springall |
| 1946/48 | J. R. MacLeod | 1974/75 | T. W. H. Curtis |
| 1948/49 | R. N. Cannon OBE | 1975/76 | M. Rogers |
| 1949/50 | S. G. Taylor | 1976/79 | T. W. H. Curtis OBE |
| 1950/51 | J. N. Frears CBE | 1979/80 | G. F. Kilburn AFC |
| 1951/52 | G. Halford/C. R. Morgan | 1980/82 | R. F. Lister |
| 1953/54 | C. O. Harrison | 1982/83 | R. F. Lister/S. Jones |
| 1954/55 | D. Watt | 1983/84 | S. Jones |
| 1955/56 | J. Bosomworth | 1984/87 | K. J. Wroe |
| 1956/57 | A. G. Birkett | 1987/89 | R. G. Murray |
| 1957/58 | F. A. Bates MBE | 1989/91 | M. Handley |
| 1958/59 | T. W. H. Curtis | 1991/94 | D. P. Roberts |
| 1959/60 | A. T. Carder | 1994/96 | P. N. Wilkinson |
| 1960/62 | H. Colbourne | 1996/98 | D. N. C. Garman |
| 1962/63 | J. H. Stevens | 1998/00 | P. W. Farnsworth |
| 1963/64 | C. S. A. Tootal | 2000/02 | P. Baker |
| 1964/65 | C. G. Sharrock | 2002/04 | W. R. Warburton, MBE |
| 1965/66 | D. G. Marsh | 2004/07 | H. M. Warnick |
| 1966/67 | A. C. Parsonson | 2007/08 | B. Robinson |
| 1967/68 | W. E. Gunstone | 2008/10 | J. S. Street |
| 1968/70 | A. J. Willson | 2010/12 | M. Fairweather |
| 1970/71 | G. Springall | 2012/13 | P. Molyneux/A. Mayfield |
| 1971/72 | T. W. H. Curtis | 2014/17 | A. Mayfield |
| 1972/73 | G. E. Vere | 2017/23 | M. Roberts |

Andrew Pyne
Chief Executive



Samantha Nottage
Technical and Regulatory
Executive



Catherine Stevens
Administrator



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