



Welcome to Valencia, Spain!

October 22-23 With Facility Tours





But Before We Start.....

Who Traveled The **LONGEST Distance To
Come Here?**

Who Traveled The **SHORTEST Distance To
Come Here?**

(Prizes Awarded!)

WiFi

WiFi (SSID):

AINIA_Guest

Password:

011*W4ZXp3



Why Are We Here?

Vision: A Global Flatbreads Industry That Grows By Serving Consumers and ***Supporting Each Other***

Mission: To Boost The Success Of Member Companies Through Collaboration

Strategy: Plan And Deliver Events From Which People Take Home Knowledge They Apply Immediately And Make Lucrative New Contacts

OPENING SESSION AGENDA

- I. Conference Overview
- II. Tortilla Market Data Project Overview
- III. Upcoming TIA Events
- IV. Experts Forms
- V. Factory Tours Day Overview (Henrik)
- IX Start Today's Classes





TIA Europe Conference 2024 - Valencia SPAIN



| | | Tuesday 22 October | SPEAKER |
|--------------|----|--|---|
| 8:30-9:00 | | Name Badges Pickup & Coffee Service | |
| 9:00-9:15 | 1 | European Tortilla Market Data Update & TIA Overview | Jim Kabbani, TIA |
| 9:15-9:45 | 2 | Intro to Blendhub and AINIA | Henrik Kristensen & Cristina Del Campo |
| 9:45-10:15 | 3 | Easy Uses of Spectroscopy for Better Quality Control & Faster Decisions | Jacob Kristensen |
| 10:15-10:45 | 4 | Techniques to Compensate for Declining Wheat Quality | Novrani Bundhoo, Muhlenchemie |
| 10:45-11:15 | 5 | The Tortilla Blueprint: Strategies for Cost Reduction | Dr Dilek Austin & Angela Santana - BRENNTAG |
| 11:15-11:45 | 6 | Using Consumer Research to Build Great Tortilla Chips | Carine Egoroff - IFF |
| 11:45-12:15 | 7 | Innovation Opportunities in Tortilla Market Development | Thierry Nicolai, Merel Roes - AB Mauri |
| 12:15-12:45 | 8 | Gluten-Free Production Techniques with Latest Equipment | Clay Lawrence, Lawrence Equipment |
| 12:45-1:30 | | Lunch Break | |
| 1:30-2:00 | 9 | "Ask The Experts" panel | Tim, Nic, Richard, Thierry, Clay |
| 2:00-2:30 | 10 | How Fibers Impact Tortilla quality | Richard Lau - JRS |
| 2:30-3:00 | 11 | New Perspectives in Tortilla Production: Alternative Ingredients | Alba Gozalbes - AINIA |
| 3:00-3:30 | 12 | EU Tortilla Import Regulations Overview | Laura Lopez - AINIA |
| 3:30-4:00 | 13 | Interdependence of strength and freshness in Tortilla shelf-life performance | Nic Franciosi - IFF |
| 4:00-4:30 | 14 | Performance of Prime Masa Flour in Table Tortilla and Tortilla Chip Production | Carlos Olivares Rodriguez - Buhler |
| 4:30-5:00 | 15 | Beyond Encapsulation: Acids in Tortillas | Gemma Marin, Vedeqsa |
| 5:00-5:30 | 16 | The Coming Digital Transformation in the Tortilla & Flatbread Industries | Eduard Marfa, Siemens |
| 5:30-6:00 | 17 | How Emulsifiers affect Tortilla Properties | Cecile Buch, OLEON |
| 6:00-7:30 | | Tabletop Exhibits Cocktail Reception | |
| 7:30pm | | Optional - Courtesy Bus from AINIA to Downtown Valencia Hotels District | |
| | | | |
| | | Wednesday 23 October | SPEAKER |
| 8:30-9:00 | | Organize Groups & Start Boarding Buses as per separate Information | |
| 9:00-9:30 | 1 | Group "A" | |
| 9:30-10:00 | 2 | Group "B" | |
| 10:00-10:30 | 3 | Group "C" | |
| 10:00-11:30 | 4 | Group "D" | |
| 10:00-5:00pm | | Bus return back to Hotels Area | |

*** details subject to change ***




“Ask The Experts”

ALL TOPICS WLECOME – E.G. Tortilla Quality, Plant Operation, Pricing & Profitability, Ingredients, Equipment Use, etc

SIGNUP SHEETS

- At The Badge Pickup Desk
- Number of Attendees Set By Each Facility (usually 20)
- “First Come, First Served”
- Producers have priority in signing up
- Minibus Arranged for Tours
- NOTE:
Bus tonight to downtown hotel area

SIGN-UP SHEET
For Facility Tours



FACILITY NAME: **IMPORTACO** (23 October)

NOTE: * Limit 20 persons per tour – first come / first served basis |
* Producer Company (tortilla manufacturers) representatives have **priority**
* Signing up does NOT necessarily guarantee a place on the tour, we are subject to host facility limits
* Bus is only available for some tours and has limited capacity

A) PRODUCER COMPANY ATTENDEES:

| <u>Your Name</u> | Your Company Name |
|------------------|-------------------|
| 1. | |
| 2. | |
| 3. | |
| 4. | |
| 5. | |
| 6. | |
| 7. | |
| 8. | |
| 9. | |
| 10. | |
| 11. | |
| 12. | |
| 13. | |
| 14. | |
| 15. | |
| 16. | |
| 17. | |
| 18. | |
| 19. | |
| 20. | |

B) SUPPLIER COMPANY ATTENDEES:

| <u>Your Name</u> | Your Company Name |
|------------------|-------------------|
| 21. | |
| 22. | |
| 23. | |
| 24. | |
| 25. | |
| 26. | |
| 27. | |
| 28. | |
| 29. | |
| 30. | |

Bus & Tour Rotation Overview

| | AINIA | BUSSES | DACSA | IMPORTACO | BLENDHUB |
|-------|-------------------------|--|-------|-----------|----------|
| 8:30 | Presentations | | | | |
| 9:30 | Tour of AINIA | Bus #1 to DACSA | | | |
| 9:45 | Cars to Blendhub < OR > | Bus #2 to IMPORTACO | | | |
| 11:00 | End AINIA Tour | Bus#1 Returns from DACSA | | | |
| 11:15 | | Bus #1 to DACSA (again) | | | |
| 12:30 | | Bus#1 Returns from DACSA | | | |
| | END | | | | |
| | NOTES: | Bus #1 Goes to DACSA twice and returns to AINIA (20 mns One way) | | | |
| | | Bus #2 Goes to IMPORTACO then ONLY Returns to City Center | | | |
| | | Private Cars for travel to Blendhub (2 hours one way) | | | |
| | | Bus #1 takes people to City Center at end of Tours | | | |



Tortilla Market Worldwide

Preliminary Overview

Full Report at TIA Convention

(Will Be Posted on TA Website Shortly)



Source: United States Department of Agriculture (USDA), Food and Agriculture Organization of the United Nations (FAO), African Union (AU) - Department of Rural Economy and Agriculture, Latin American Economic System), Tortilla Industry Association (TIA), International Association of Culinary Professionals (IACP), International Foodservice Distributors Association (IFDA), Institute of Food Technologists (IFT), MRFR Analysis, Companies Annual Report and Others

Collection, Aggregation & Integration Of Multiple Data Sources



Key Points:

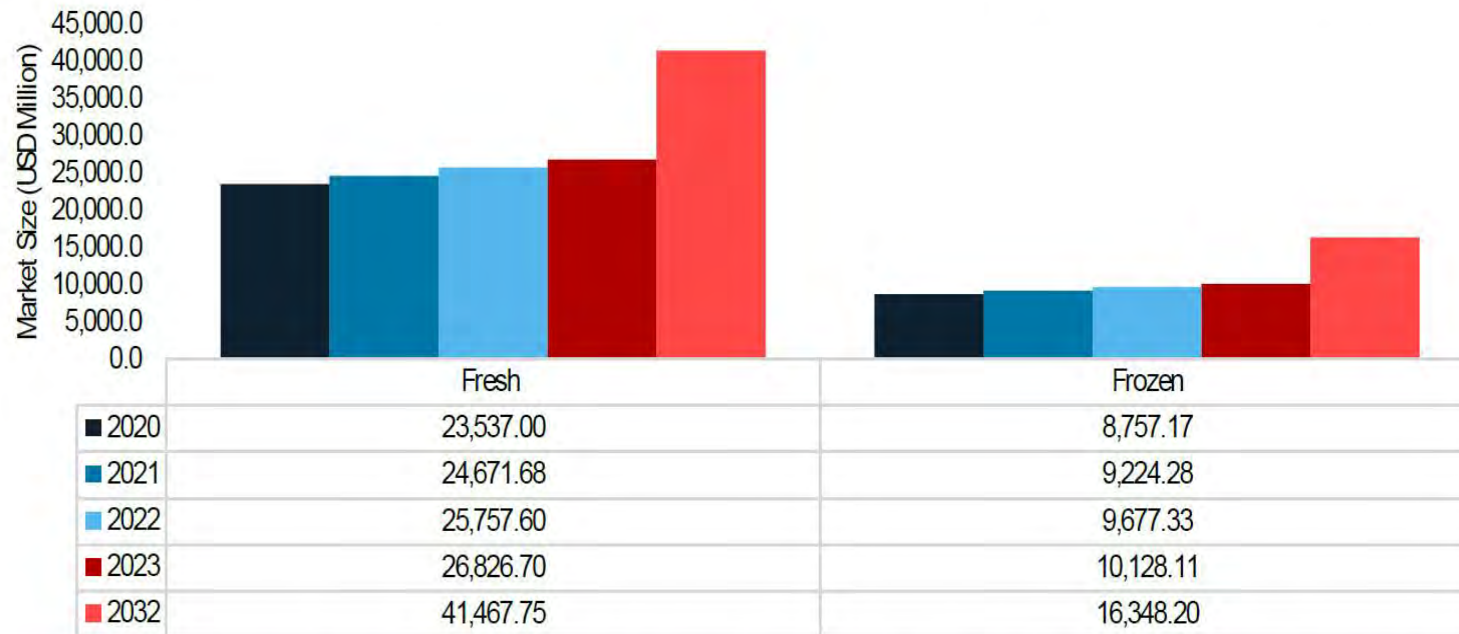
- \$37 Billion USD worldwide in 2023
 - \$16 Billion USD in USA in 2023
 - \$3.3 Billion in Europe in 2023
- \$58 Billion USD worldwide by 2033
 - \$24 Billion USD in USA by 2033
 - \$5.5 Billion in Europe in 2033
- CAGR 5.2%



GLOBAL OVERVIEW



GLOBAL TORTILLA MARKET, BY PROCESSING TYPE, 2022 & 2032 (USD MILLION)



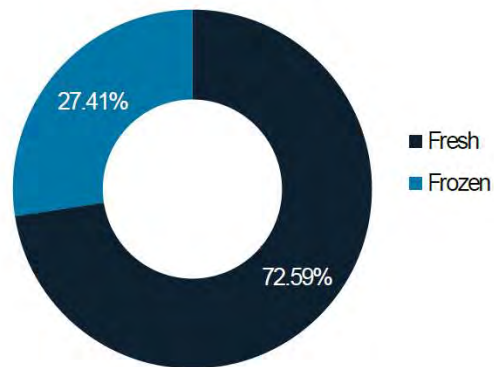
Source: United States Department of Agriculture (USDA), Food and Agriculture Organization of the United Nations (FAO), African Union (AU) - Department of Rural Economy and Agriculture, Latin American Economic System), Tortilla Industry Association (TIA), International Association of Culinary Professionals (IACP), International Foodservice Distributors Association (IFDA), Institute of Food Technologists (IFT), MRFR Analysis, Companies Annual Report and Others



GLOBAL TORTILLA MARKET, BY PROCESSING TYPE, 2020–2032 (USD MILLION)

| Processing Type | 2020 | 2021 | 2022 | 2023 | 2024 | 2032 | CAGR (2024-2032) |
|-----------------|-----------|-----------|-----------|-----------|-----------|-----------|------------------|
| Fresh | 23,537.00 | 24,671.68 | 25,757.60 | 26,826.70 | 27,951.30 | 41,467.75 | 5.05% |
| Frozen | 8,757.17 | 9,224.28 | 9,677.33 | 10,128.11 | 10,604.01 | 16,348.20 | 5.56% |
| Total | 32,294.17 | 33,895.96 | 35,434.93 | 36,954.81 | 38,555.31 | 57,815.95 | 5.20% |

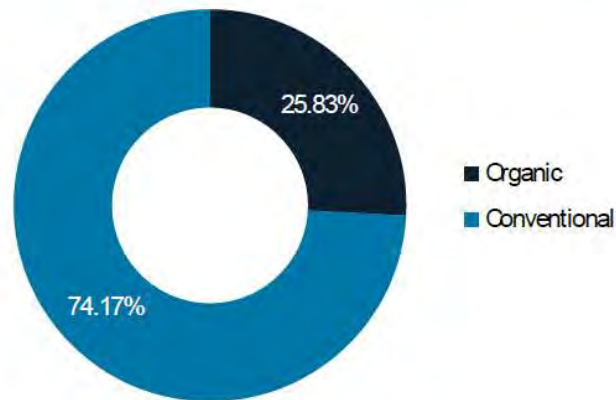
GLOBAL TORTILLA MARKET SHARE (%), BY PROCESSING TYPE,





GLOBAL TORTILLA MARKET, BY NATURE, 2020–2032 (USD MILLION)

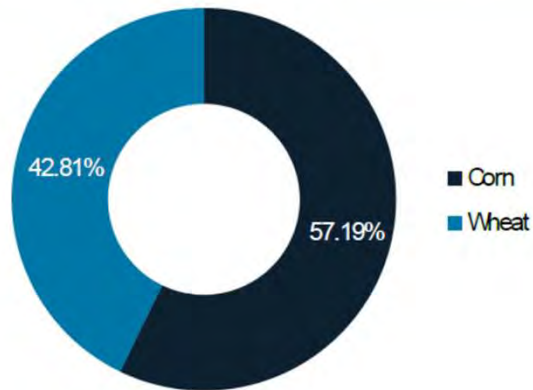
| Nature | 2020 | 2021 | 2022 | 2023 | 2024 | 2032 | CAGR (2024-2032) |
|--------------|-----------|-----------|-----------|-----------|-----------|-----------|------------------|
| Organic | 8,052.26 | 8,552.55 | 9,046.36 | 9,544.42 | 10,072.62 | 16,483.20 | 6.35% |
| Conventional | 24,241.91 | 25,343.41 | 26,388.57 | 27,410.39 | 28,482.69 | 41,332.75 | 4.76% |
| Total | 32,294.17 | 33,895.96 | 35,434.93 | 36,954.81 | 38,555.31 | 57,815.95 | 5.20% |





GLOBAL TORTILLA MARKET, BY SOURCE, 2020–2032 (USD MILLION)

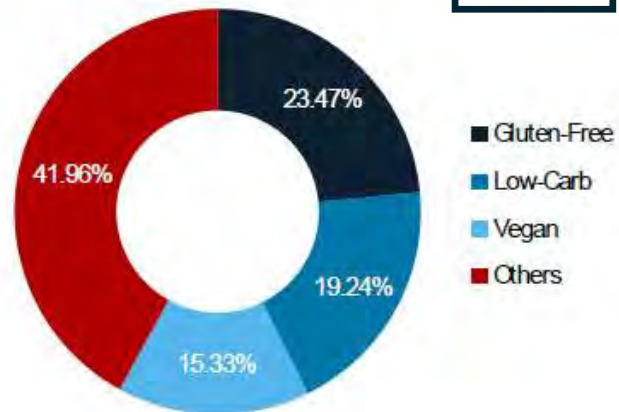
| Source | 2020 | 2021 | 2022 | 2023 | 2024 | 2032 | CAGR (2024-2032) |
|--------|-----------|-----------|-----------|-----------|-----------|-----------|------------------|
| Corn | 18,407.57 | 19,352.59 | 20,264.70 | 21,168.77 | 22,121.97 | 33,609.59 | 5.37% |
| Wheat | 13,886.59 | 14,543.37 | 15,170.23 | 15,786.04 | 16,433.33 | 24,206.36 | 4.96% |
| Total | 32,294.17 | 33,895.96 | 35,434.93 | 36,954.81 | 38,555.31 | 57,815.95 | 5.20% |





GLOBAL TORTILLA MARKET, BY CATEGORY, 2020–2032 (USD MILLION)

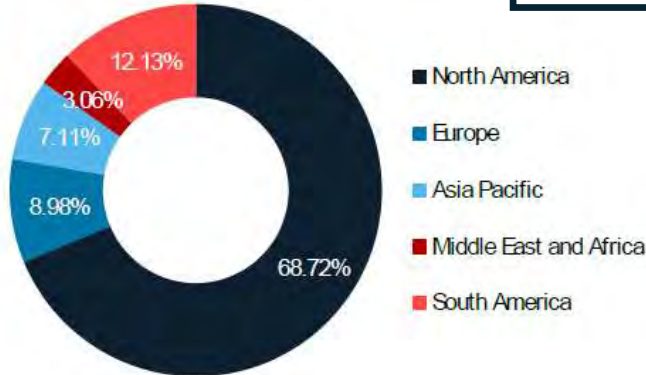
| Category | 2020 | 2021 | 2022 | 2023 | 2024 | 2032 | CAGR (2024-2032) |
|--------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| Gluten-Free | 7,500.37 | 7,900.25 | 8,288.07 | 8,673.94 | 9,081.30 | 13,998.04 | 5.56% |
| Low-Carb | 6,170.95 | 6,492.41 | 6,803.27 | 7,111.85 | 7,437.36 | 11,362.71 | 5.44% |
| Vegan | 4,849.87 | 5,125.42 | 5,394.70 | 5,664.24 | 5,949.36 | 9,398.95 | 5.88% |
| Others | 13,772.97 | 14,377.88 | 14,948.89 | 15,504.78 | 16,087.30 | 23,056.26 | 4.60% |
| Total | 32,294.17 | 33,895.96 | 35,434.93 | 36,954.81 | 38,555.31 | 57,815.95 | 5.20% |





GLOBAL TORTILLA MARKET, BY REGION, 2020–2032 (USD MILLION)

| Region | 2020 | 2021 | 2022 | 2023 | 2024 | 2032 | CAGR (2024-2032) |
|----------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| North America | 22,372.48 | 23,418.96 | 24,416.18 | 25,394.55 | 26,422.50 | 38,759.82 | 4.91% |
| Europe | 2,849.73 | 3,008.75 | 3,163.83 | 3,318.81 | 3,482.65 | 5,463.61 | 5.79% |
| Asia-Pacific | 2,202.92 | 2,344.63 | 2,485.00 | 2,626.96 | 2,777.63 | 4,607.93 | 6.53% |
| Middle East & Africa | 982.67 | 1,033.58 | 1,082.79 | 1,131.61 | 1,183.10 | 1,803.86 | 5.41% |
| South America | 3,886.37 | 4,090.03 | 4,287.12 | 4,482.88 | 4,689.43 | 7,180.74 | 5.47% |
| Total | 32,294.17 | 33,895.96 | 35,434.93 | 36,954.81 | 38,555.31 | 57,815.95 | 5.20% |



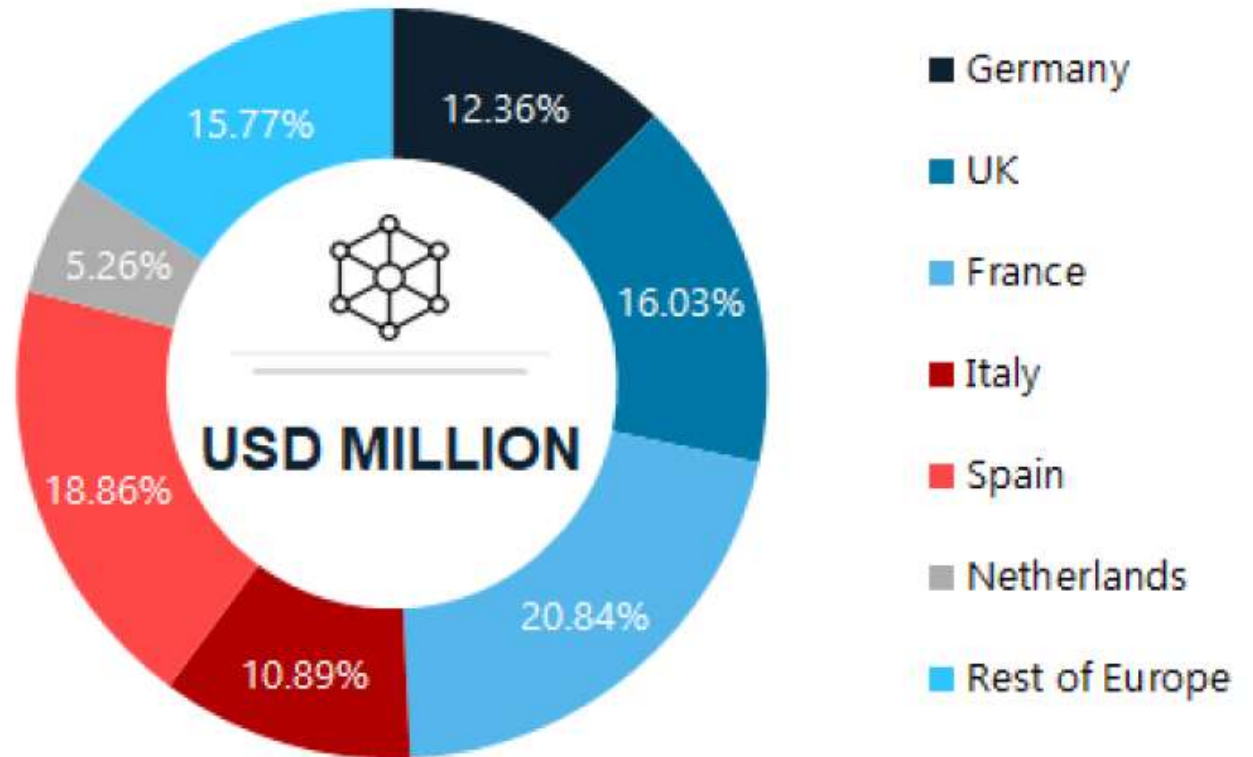
EUROPE

By Country



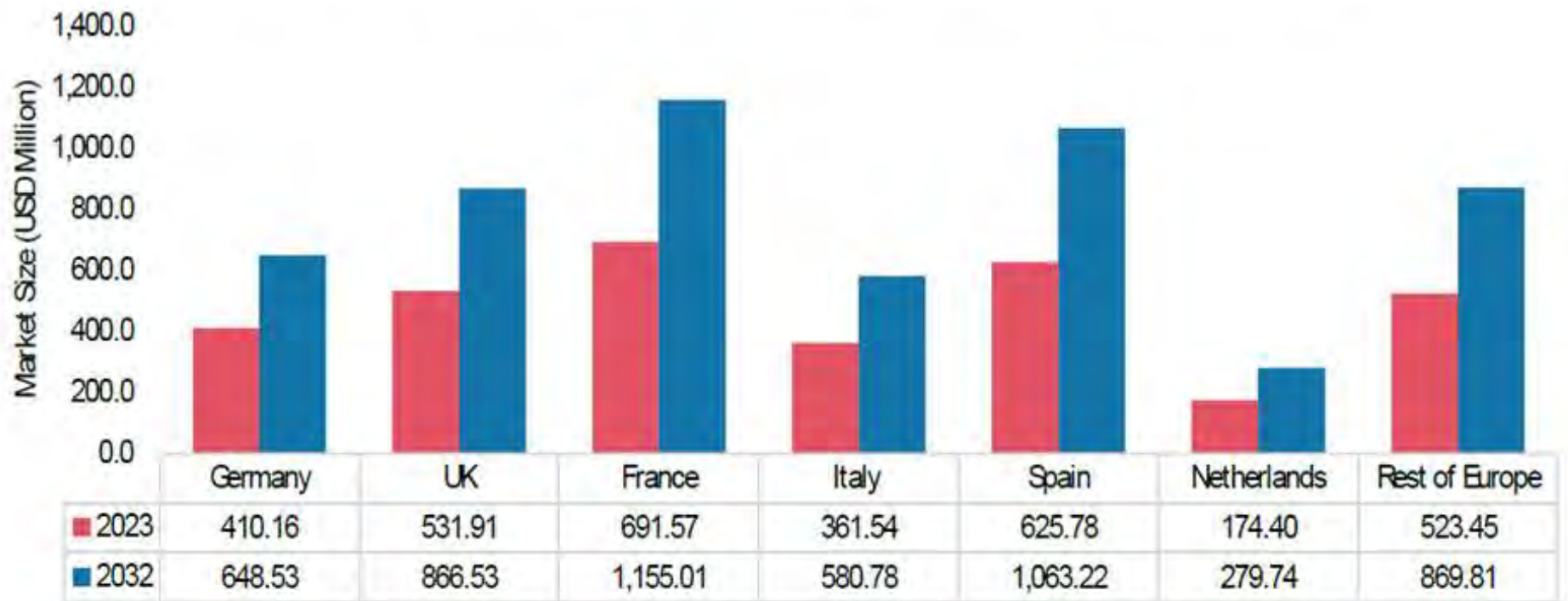


EUROPE: TORTILLA MARKET SHARE, BY COUNTRY, 2022 (% SHARE)





EUROPE: TORTILLA MARKET, BY COUNTRY, 2022 & 2032 (USD MILLION)



Full Report at
TIA Convention

**This Presentation
On TIA Website in 2
Weeks**

NEXT EVENT:



Brings Tortilla-Making Excellence To



TIA's Hands-On Tortilla Production Class! December 3,4,5 of 2024 Los Angeles CA

SoCalGas Energy Resource Center | 9240 Firestone Downey, CA 90241

Give your business the competitive advantage that comes from a workforce that really understands all the important aspects of tortilla making. Taught by top experts in our industry, this 3-day "Hands-On" class will give you the opportunity to actually mix your own dough trying different formulations then bake your own tortillas in a commercial-grade oven, and then see the finished results of the different formulations. You'll also learn the science behind why & how tortillas turn out the different ways they do, the properties of different flour types and additives, and learn how to trouble-shoot your products.

~ Covers Both FLOUR and CORN Tortillas ~

*** REGISTER TODAY – SPACE IS EXTREMELY LIMITED ***

**CERTIFICATES & USB Drive
AWARDED AT COURSE COMPLETION
TO EACH STUDENT**



See Course Syllabus For Details

Questions?

Contact: jkabbani@tortilla-info.com
or call +1.703.819.9550





Preview...

2025

CONVENTION



May 14-15

(Board Meeting 5/12 – Golf & Reception 5/13)

Pechanga Resort Casino Temecula, CA





Temecula Is...

Pechanga Resort Conference Center

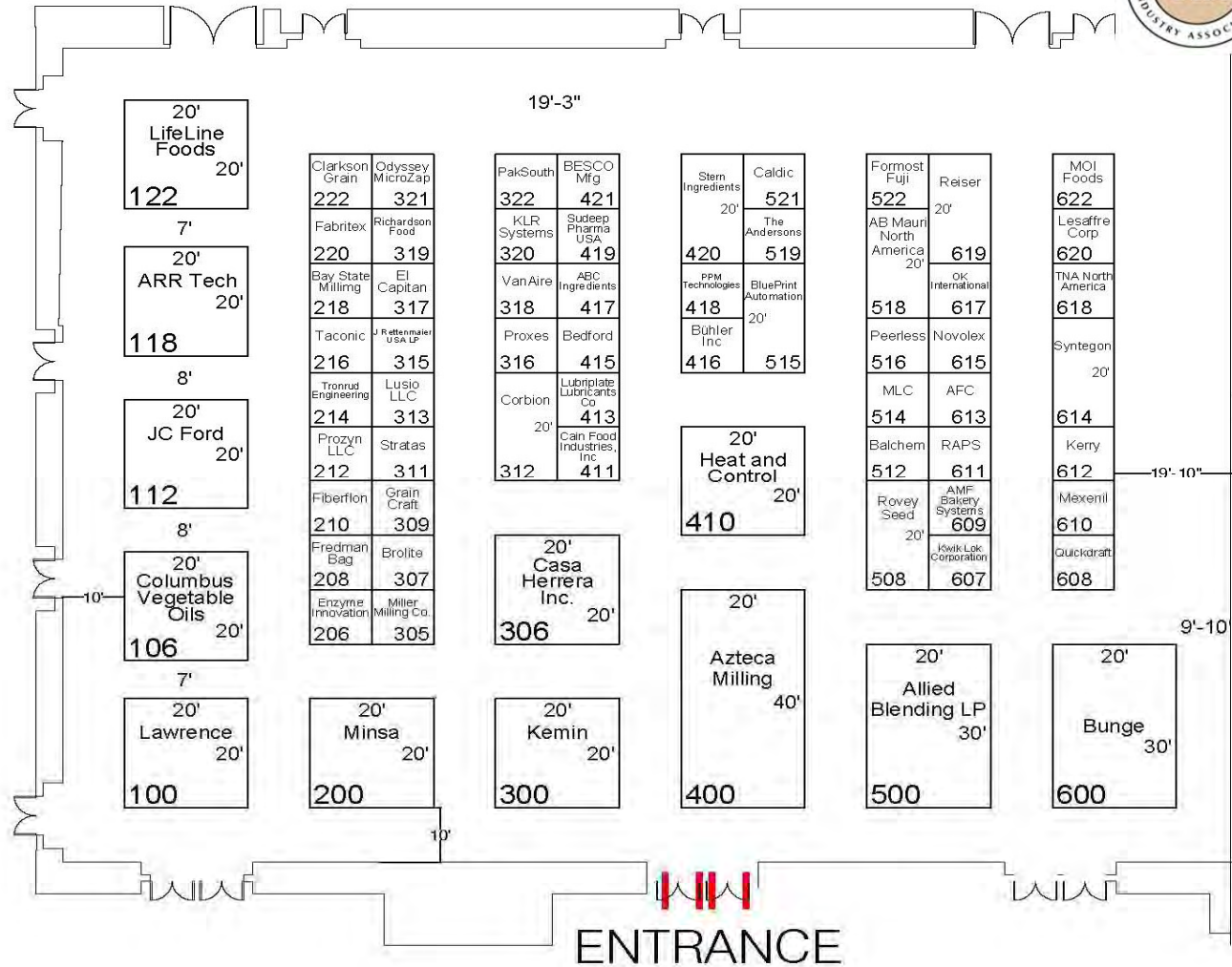


TIA 2025 Exhibits SOLD OUT



(sold out Aug 2024)

List Of Exhibitors
on TIA Website



Seeking Suggestions
for
2025 TIA Europe





And Now For Our First Speaker !