



NORTHERN

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GRAINS RESEARCH
& DEVELOPMENT
CORPORATION

WHEAT

SECTION 15

MARKETING

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BOARDS

SECTION 15

Marketing

Australia produces on average 24 million tonnes (t) of wheat per year, 75–80% of which is destined for export markets, primarily in the Middle East and Asia (Photo 1). Australian wheat has a high level of versatility on the world market and this sees it blended with other wheats to provide a range of flours for use in noodles, bread and bakery products. Relative to its competitors on the global market, only a small proportion of Australia's wheat exports (Australian Prime Hard or APH) rates as high protein wheat. Queensland and northern New South Wales are the main regions for the production of APH quality wheat.

In Queensland, on average 800,000 ha of wheat is sown annually in the southern and central regions, producing ~1.2 million t of grain. About half of Queensland's production is destined for export and a quarter each for domestic milling and for the domestic feed grains market.¹

New South Wales produces around 2.5 million t or AU\$1.6 billion worth of wheat per annum.²

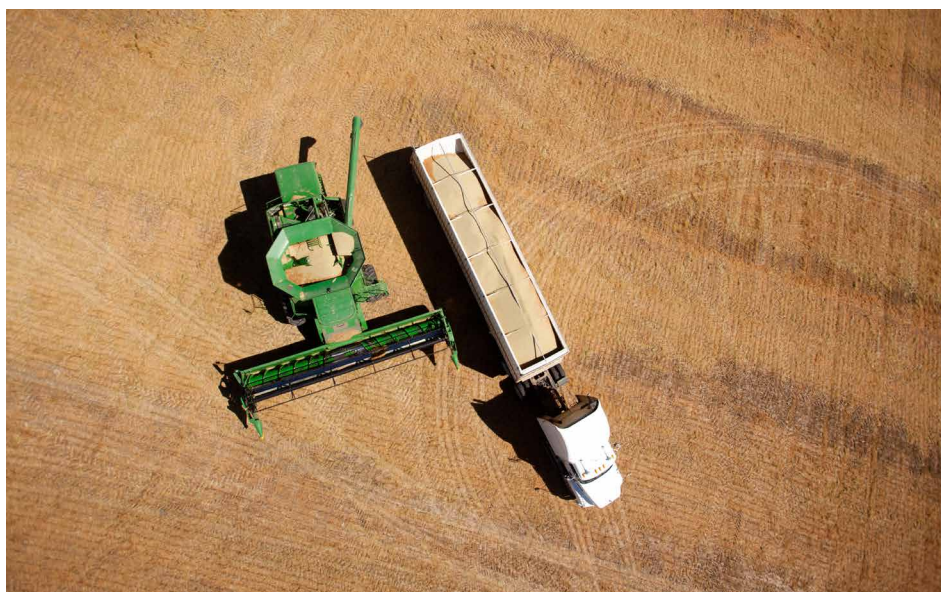


Figure 1: Australia produces on average 24 million tonnes (t) of wheat per year.

15.1 Australian wheat grades

For current world markets, a balance is required between grain hardness and protein content to meet different end uses. Wheat in Australia is marketed and classified into six

¹ Queensland Government (2009) Wheat quality and markets in Queensland. Department of Employment, Economic Development and Innovation Queensland, http://www.daff.qld.gov.au/_data/assets/pdf_file/0006/53799/Wheat-FactSheet-Quality-Markets-Qld.pdf

² NSW Government (2011) Atlas of New South Wales: Agriculture—grains and oilseeds. Land and Property Information, NSW Department of Finance and Services, <http://www.atlas.nsw.gov.au/public/nsw/home/topic/article/agriculture-grains-and-oilseeds.html>

major grades. These grades are based on variety, general cleanliness and soundness, and protein content. In Queensland, the main focus is the production of hard-grained wheats for the Middle East, Japan and China.

Australian Prime Hard (APH)

Australian Prime Hard is Australia's top-quality, high-protein milling wheat. It consists of specially selected white, hard-grained wheat varieties of exceptional milling quality. It is normally segregated and sold at guaranteed minimum protein levels of 13%.

Flour milled from Australian Prime Hard wheat is used to produce high-protein, Chinese-style yellow alkaline noodles and Japanese ramen noodles of superior brightness, colour and eating quality. Australian Prime Hard flour is suitable for the production of high-protein, high-volume breads and wonton dumpling skins. It can also be blended with lower protein wheats to produce flours suitable for a wide range of baked products.

Australian Hard (AH)

Australian Hard is a white wheat comprising specific hard-grained varieties with the No.1 grade segregated at a minimum protein level of 11.5%. Australian Hard is clean, dry and sound, ensuring the production of high-quality flours at high extraction rates. The flour derived from Australian Hard is suitable for the production of a wide range of breads, including European-style pan, hearth and a variety of bread products. It is also particularly suited to the production of Middle Eastern flat breads, Chinese steamed bread and Chinese-style alkaline noodles.

Australian Premium White (APW)

Australian Premium White is a blend of white, hard-grained wheat varieties selected to ensure high milling performance and consistent flour quality. The minimum 10% protein level and hard grain characteristic of Australian Premium White ensures free milling and excellent extraction rates. Australian Premium White flour is suitable for a wide range of products, including varieties of Asian noodles such as Hokkien, instant and fresh noodles. It is also ideally suited for the production of Middle Eastern and Indian-style breads and Chinese steamed bread. Note. All Australian Prime Hard and Australian Hard varieties are acceptable as Australian Premium White.

Australian Standard White (ASW)

Australian Standard White is a highly versatile, medium- to low-protein white wheat representing excellent value for straight milling or blending purposes. A multi-purpose wheat, it is used in the production of a wide range of products including Middle Eastern, Indian and Iranian-style flat breads, European-style breads and rolls, and Chinese steamed bread. This versatility ensures its popularity as a consistent and genuine value-for-money product.

General Purpose (AGP)

The General Purpose grade comprises wheat that has failed to meet minimum receival standards for milling wheat grades because of low test weights (≤ 68 kg/hL), presence of screenings or foreign material, or a mild degree of sprouting. Falling number counts are generally at ≥ 200 . This product is general used in the feed grains industry.

Feed wheat

The Feed wheat grade in general consists of severely sprouted wheat deliveries with falling number tests < 200 and test weights ≤ 62 kg/hL. Low falling number tests generally indicate high levels of α -amylase activity due to sprouting, which makes it unsuitable in the milling industry. The increased enzyme levels do not detract from the nutritional value of these wheats and they are therefore suitable for animal feed.

Australian Durum (ADR)

ADR1 consists of selected wheat varieties with vitreous, amber-coloured kernels with a minimum protein of 13%. Durum wheat differs from the other wheats in having

endosperm that does not break into fine flour when milled but into coarse semolina, ideal for pasta making. The free-milling grain is capable of achieving high yields of superior quality semolina with minimal residual flour production. The semolina produced from this specialised wheat exhibits high levels of stable yellow pigment and high water absorption, making it ideally suited to the production of a wide range of high-quality wet and dry pasta products with excellent colour and shelf life. Durum is produced primarily in northern New South Wales, South Australia, Queensland and areas where hard and prime hard wheat are grown. Tonnages produced are sufficient to satisfy domestic requirements and, increasingly, international market demands.³

15.2 Wheat markets

Over the last few years, increasing emphasis has been placed on supplying wheat of specific qualities as flour milling and processing industries overseas have become more sophisticated. Current markets require wheat grades in which there is a balance between grain hardness and protein content for different end uses. Figure 2 shows the relevant protein hardness values for each grade, and the different end uses for each grade of wheat.

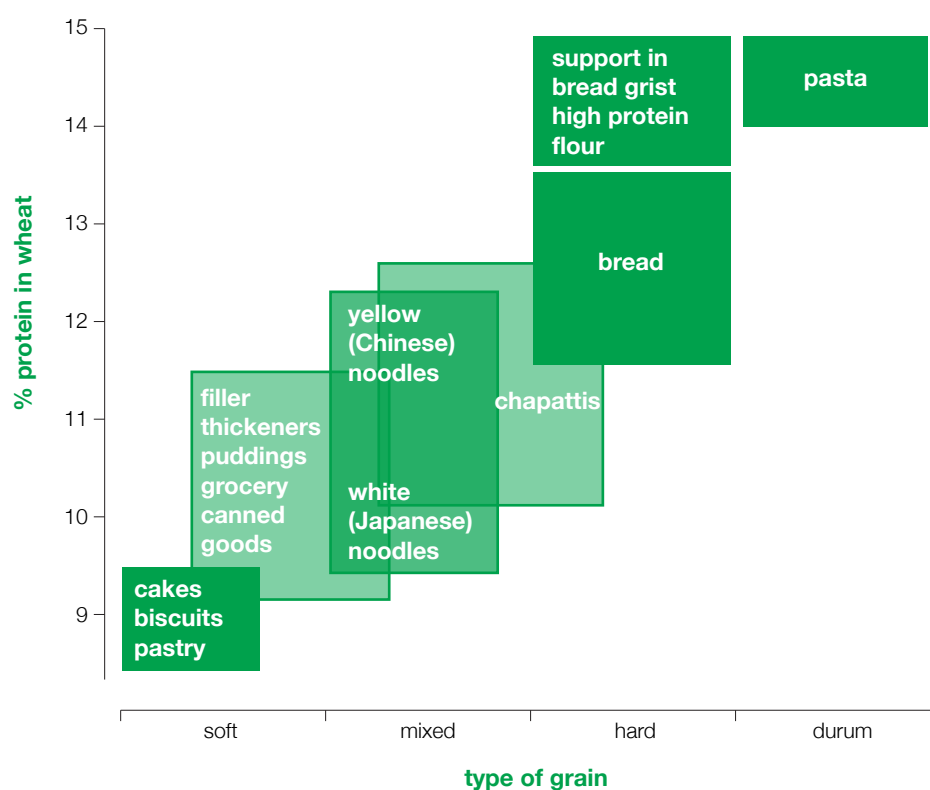


Figure 2: Balance between protein content, hardness and end-product requirements. (Source: Weston Milling, 2008.)

15.3 Links to industry boards

<http://www.graincorp.com.au>

<http://www.awb.com.au/growers>

[https://www.cbh.com.au/media/310158/cbh19112%20grain%20marketing%20guide%20\(web%20spreads\).pdf](https://www.cbh.com.au/media/310158/cbh19112%20grain%20marketing%20guide%20(web%20spreads).pdf)

³ Queensland Government (2009) Wheat quality and markets in Queensland. Department of Employment, Economic Development and Innovation Queensland, http://www.daff.qld.gov.au/_data/assets/pdf_file/0006/53799/Wheat-FactSheet-Quality-Markets-Qld.pdf