

Wheat Guide 2024



UK FLOUR MILLERS

A COMPETITIVE MARKET FOR UK MILLING WHEAT

Through economic crises and poor harvests, the nation's demand for flour remains strong, as does miller demand for homegrown wheat. Domestic wheat continues to account for around 80% of our requirements, a significant source of food security for the United Kingdom (UK) population. But as global demand for wheat increases, it is crucial that UK agriculture remains productive, sustainable, and competitive, ensuring food security. In recent years, the availability of homegrown wheat meeting milling specification has been in decline. This coupled with our consistent demand for grain has led to a very competitive market for milling wheat, with premia at their highest level for many years.

Group 1 wheat production and UK milling total annual wheat demand (million tonnes)



2024 is an estimate based on area from AHDB Early Bird Survey and 2020 yield average. UK milling wheat demand for 2024 estimated from UK Flour Miller wheat usage survey and AHDB cereal usage survey data.

ACHIEVING SPECIFICATION

The pressures on inputs have led to some growers reconsidering their nitrogen application protocols and, in many cases, reducing the volume of nitrogen fertiliser applied to wheat crops. Nitrogen is crucial to achieve yield and milling protein specification, so this reduction has added pressure to the supply of milling wheat.

Economic analyses indicated that milling wheat growers should continue to apply enough nitrogen to hit the typical milling specification. What remains crucial is the need to understand the requirements of the market you supply and the contracts on offer to ensure that optional changes to agronomy do not have an unintended effect on grain marketability.



SY CHEER GROUP RATING TO BE CONFIRMED IN SEPTEMBER 2024

It has been some time since a new Group 1 winter wheat joined the Recommended List (RL). SY Cheer is undergoing final assessments by the milling industry to confirm our rating in September 2024. In initial trials, this variety has shown excellent grain quality, with good protein, specific weight, and Hagberg Falling Number seen across harvests. The protein quality so far has been good, with high gluten strength delivering good baking performance. The disease resistance profile of the variety is likely to appeal to growers, as will the good grain quality which increases the likelihood of hitting milling specification.



ERGOT CONTROL

Ergot continues to be a problematic disease for arable farms across the country. Strict ergot limits affecting flour and flour-based products sold in Northern Ireland and exported to European Union (EU) member states have led to many mills reducing their ergot tolerances to zero or near zero. It is crucial that farmers view this as a food safety issue and address the disease on-farm by applying the available management strategies. If your grain contains ergot, it should be cleaned before delivery to a mill to avoid a costly rejection. UK Flour Millers chairs the Ergot Working Group, which highlights the issues ergot causes and steers funding towards research that supports farmers in tackling it.



WHEAT VARIETIES 2024

- The UK Flour Millers Wheat Guide provides the UK milling industry's views on wheat varieties and their relative values in the UK market. It complements other information provided in the 'AHDB Recommended Lists 2024/25 for cereals and oilseeds'.
- Seasonal variations in climate and growing conditions mean that varieties may vary in their agronomic performance, and that this could influence 'end-use' performance.
- The reliability and safety of milling wheat is of paramount importance. Millers only purchase wheat varieties in this guide that have been grown to assured standards such as those within the Red Tractor Combinable Crops Assurance Scheme or the Scottish Quality Crops Scheme.

- Harvested wheat should be properly stored using a Hazard Analysis Critical Control Point (HACCP) approach (review the 'AHDB Grain storage guide for cereals & oilseeds'). Different varieties should be separated within stores to maintain their full value. Even where varieties are of apparently similar value, mixing can reduce their marketability – a factor brought out in the comments below.
- Whilst a number of factors influence varietal choice, the preference of local millers should always be a key consideration. Use the UK Flour Millers mill map (<https://www.ukflourmillers.org/millmap>), to find the mills near you.

Varieties are listed alphabetically within each of the UKFM Groups.

UKFM GROUP 1

1

- These are the varieties that produce consistent milling and baking performance.
- Providing they achieve the specified quality requirements including 13% protein, 250s Hagberg Falling Number (HFN), and a specific weight of 76kg/hl, millers will offer a premium above base prices.
- Lower protein Group 1 wheat may also be of value but will attract a lower premium.
- Group 1 varieties are not interchangeable, and some are better suited to specific uses than others. Therefore, it is important to understand the end-use requirements of your customer.

Crusoe: This variety has consistently demonstrated good protein content and quality. The bread crumb structure is notably white and of good quality. The baking performance of this variety is good and consequently it remains popular with millers.

KWS Zyatt: This variety is popular with millers as it shows good gluten strength and milling quality alongside a good baking performance. As a high yielding variety, nitrogen applications may have to be adjusted to achieve protein specifications.

RGT Illustrious: This variety has a higher level of water absorption (a good feature) and demonstrates good breadmaking potential, even at lower protein levels.

Skyfall: Large quantities of this variety continue to be seen by millers and it is popular due to good milling and baking qualities. Because it is high yielding, nitrogen applications may have to be adjusted to achieve protein specifications.

SY Cheer (potential new Group 1): This variety initially showed good protein content and quality, as well as high specific weight over the three years of testing. The baking performance was good, and its Group rating will be confirmed following additional milling and baking assessments in September 2024.

SPRING WHEAT

KWS Harsum: This variety has lower protein than other Group 1 spring wheats, but the gluten strength is good and consistent. There is good baking performance with only slight variation seen.

KWS Ladum: This variety has good protein levels and gluten quality, although slight variation is seen in the baking quality.

Mulika: This variety has good protein levels but the gluten quality is weaker than the other Group 1 spring varieties and there is some variability in its baking performance.

Nissaba: This variety has good protein levels and gluten quality, although slight variation is seen in the baking quality.

UKFM GROUP 2

2

- This group comprises varieties that exhibit bread-making potential but are not suited to all grists.
- Some varieties are consistent, but not as good as those in Group 1; some perform inconsistently while others are suited to specialist flours. Therefore, these varieties are likely to attract varying market prices.
- Lower protein Group 2 wheats are also widely used by millers but will attract variable premiums.

KWS Extase: This variety has protein levels that are typical of a Group 2. It shows some variability in its baking performance.

KWS Palladium: This variety has protein levels that are typical of a Group 2 and higher levels of water absorption (a good feature) than most Group 2 varieties. It shows some variability in its baking performance.

KWS Ultimatum: This variety has protein levels that are typical of a Group 2, with some variability in its baking performance.

Mayflower: This variety shows good protein levels and higher levels of water absorption (a good feature) than most Group 2 varieties. It shows some variability in its baking performance.

SPRING WHEAT

KWS Alicium: This variety shows high specific weights and good gluten quality, although slight variability is seen in the baking performance.

KWS Cochise: This variety has shown good protein levels and specific weights, although there is a degree of variability in its baking performance.

KWS Lightum: This variety shows good analytical quality. The gluten quality is acceptable, but some yellowness is seen in the flour colour and there is some variability in the baking performance.

WPB Mylo (NEW): Over the three years of testing, this variety showed good analytical quality, although slight variability was seen in the baking performance.

UKFM GROUP 3

3

- This Group contains soft varieties for biscuit, cake, and other flours where the main requirement is for soft milling characteristics, low protein, good extraction rates, and extensible but not elastic gluten.
- The Group 3 wheat area is at one of its lowest levels, despite consistently strong demand by UK millers.

Almara (NEW): Over the three years of testing, this variety showed some variation in Hagberg Falling Number. Some variability in gluten quality was seen but it met the Group 3 criteria.

Bamford (NEW): Over the three years of testing, this variety showed good specific weights and gluten quality that met the Group 3 criteria.

KWS Brium: This variety meets the Group 3 criteria.

LG Astronomer: This variety meets the Group 3 criteria, although it shows slight variability in gluten quality.

LG Illuminate: This variety meets the Group 3 criteria.

RGT Rashid: This variety meets the Group 3 criteria.

RGT Wilkinson: This variety meets the Group 3 criteria.

UKFM GROUP 4

4

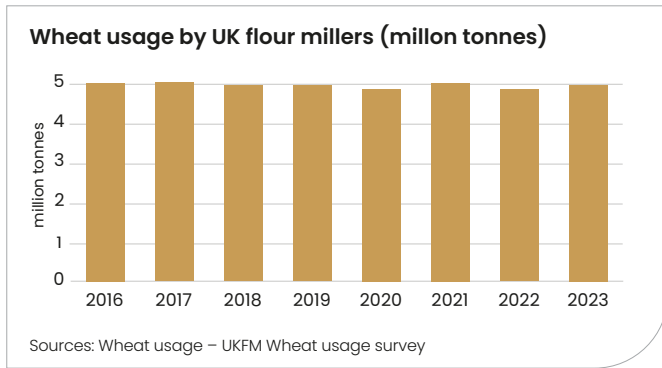
- These varieties are grown mainly as feed wheats. However, some may be used by millers in certain 'general purpose' grists if they achieve the contractual standards. However, they are unlikely to attract a significant premium.
- Growers should avoid mixing hard and soft varieties.
- The spring varieties generally have higher protein contents.

Hard: Champion, Costello, Everlong (Spring – NEW), Gleam, Graham, KWS Cranium, KWS Dawsum, KWS Fixum (Spring), LG Beowulf (NEW), LG Typhoon, Oxford, RGT Wolverine, SY Insector, WPB Escape (Spring).

Soft: Blackstone (NEW), KWS Zealum, LG Redwald, LG Skyscraper, RGT Bairstow, RGT Stokes, Swallow.

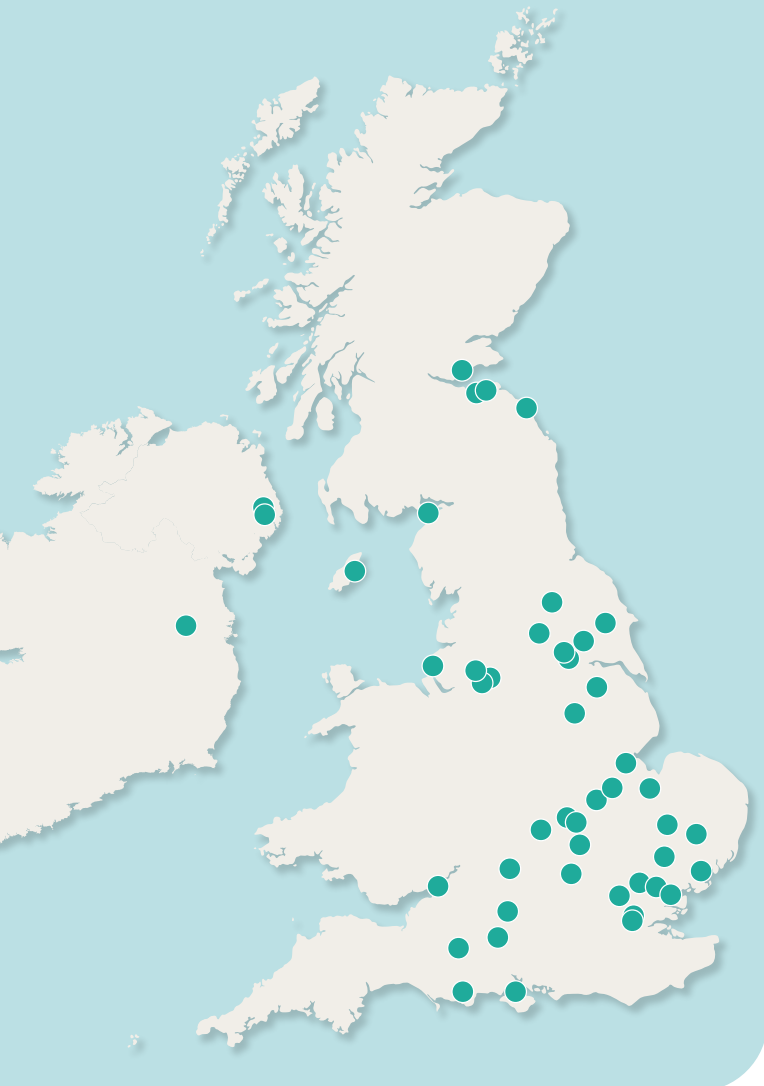
A STEADY MARKET FOR MILLING WHEAT

UK flour millers consistently use 5 million tonnes of wheat every year, of which typically 80-85% comes from British farms. This demand is stable, reflecting the fact flour is a staple food and ingredient.



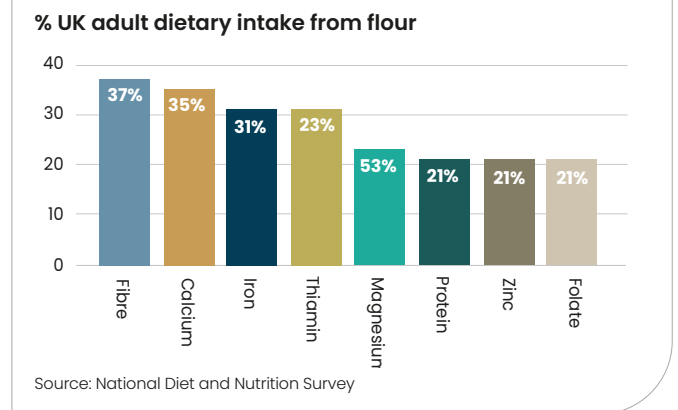
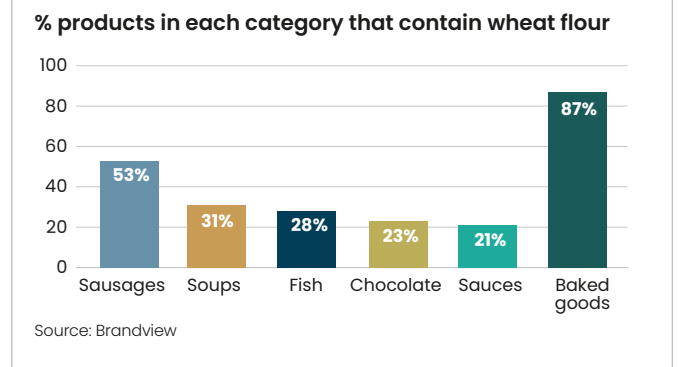
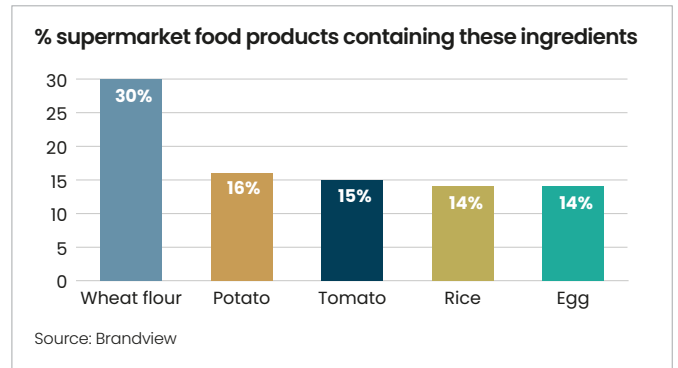
A STABLE MARKET

There are 50 mills located across the UK. Different mills have different requirements for the specification of wheat that they are looking to purchase. Our interactive mill map allows you to locate mills near you and provides relevant contact details: www.ukflourmillers.org/millmap



FEEDING THE NATION

Flour is a vital ingredient found in approximately 30% of the food products available in UK supermarkets. It is most obviously in baked goods, but as illustrated below, a significant proportion of meat and other products also contain wheat flour as an ingredient.



COMMITTED TO SUSTAINABILITY

UK flour millers are committed to milling as efficiently as possible, minimising energy use and getting the most flour out of each wheat grain. There has been significant improvement in energy efficiency, with milling sites now using approximately 10% less electricity per tonne of grain milled than in 2012.

