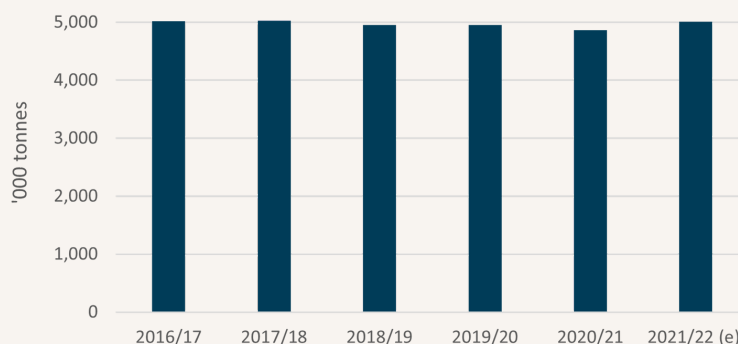




A strong market for UK wheat

Despite the double impact of Covid and Brexit, demand for UK flour remains strong, as does miller demand for homegrown wheat. The 2021 wheat crop saw a return to more normal levels of production and good headline quality, albeit with slightly lower grain fill. Consequently, miller usage of domestic wheat has reverted back to regular levels, following on from the high level of imported wheat usage in 2020. The unprecedentedly poor 2020 crop further highlighted the importance of productive UK agriculture; and millers have joined farmers and others in making the case for an agricultural strategy that focuses on efficient, sustainable production as well as environmental sustainability.

Total wheat usage by UK millers



Commitment to productivity

Given the consistency of demand for flour, it is no surprise that the UK milling industry is committed to continuous investment and improving productivity. Over the past couple of years, two new mills have been built offering farmers greater choice of destinations for milling wheat. Continuous improvements are being made to mill intakes to reduce turnaround times and increase chain efficiency. The milling industry is also closely involved in the development of the digital grain passport, which will further improve the efficiency of deliveries and the transfer of information across the chain.

Nitrogen applications

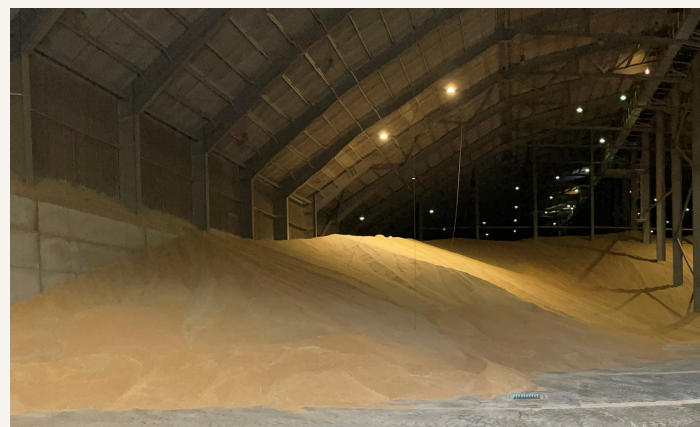
The significant rise in nitrogen fertiliser price has implications for milling wheat growers. UK Flour Millers has supported the AHDB work updating guidance to growers on cost-effective applications, taking into account not just yield impact, but the effect on protein when adjusting N rates. This guidance can be found on the AHDB website: www.ahdb.org.uk/how-best-to-respond-to-costly-fertiliser-nitrogen-for-use-in-2022

Assurance

The UK milling industry supports the crop assurance schemes Red Tractor and Scottish Quality Crops. These schemes help to ensure that food safety standards are met and grain destined for mills is fit for consumption. They provide farmers a route to the food market without costly due diligence testing, and their extensive coverage maximises access to the market and avoids duplication of audits and record keeping.

Storage and safety

Food safety is a crucial aspect of grain quality and attention must be paid to ensure that wheat destined for mills is fit for human consumption and free from contamination. Close attention must be paid to grain moisture during storage to avoid the development of storage mycotoxins. New EU ergot alkaloid limits affecting flour exported to EU member states and Northern Ireland came into effect at the beginning of 2022 and many mills have strict tolerances for ergot sclerotia in grain arriving at intake. Knowing your customer specifications on ergot sclerotia is critical to avoiding a costly rejection.





UK FLOUR
MILLERS

Wheat Varieties 2022

www.ukflourmillers.org/farmers

- 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 2022/23 for cereals and oilseeds'.
- Seasonal variations in climate and growing conditions mean that varieties may vary in their agronomic performance, and 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 HACCP approach (see the AHDB Grain storage guide for cereals & oilseeds). Different varieties should be separated within stores in order 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 consideration. Use the UK Flour Millers mill map (www.ukflourmillers.org/millmap), to find the mills near you.

Varieties are listed alphabetically within each of the UKFM Groups.

UKFM Group 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.

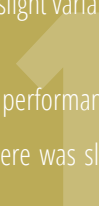
Skyfall Large quantities of this variety continue to be seen by millers and it is popular owing to good milling and baking qualities. Because it is high yielding, nitrogen applications may have to be adjusted to achieve protein specifications.

SPRING WHEAT

KWS Ladum (NEW) Over the three years of testing, this variety showed similar analytical qualities to Mulika. Whilst gluten quality was good, there was slight variation in baking quality.

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

Nissaba (NEW) Over the three years of testing, this variety showed similar analytical qualities to Mulika. The gluten quality was good, although there was slight variation in baking quality.



UKFM Group 2

- This group comprises varieties that exhibit bread-making potential, but are not suited to all grists.
- Some 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 similar to KWS Siskin and its performance is consistent with that of other Group 2 varieties. It shows some variability in its baking performance.

KWS Palladium (NEW) Over the three years of testing, this variety showed good protein levels and higher levels of water absorption (a good feature) than other Group 2 varieties. It shows some variability in its baking performance.

KWS Siskin This variety has protein levels that are typical of a Group 2. Some yellowness may be seen in the flour colour. It has shown a degree of variability in its baking performance so may be more suited to use in blends.

Mayflower (NEW) Over the three years of testing, this variety showed good protein levels. This variety showed higher levels of water absorption (a good feature) than other Group 2 varieties. It shows some variability in its baking performance.

SPRING WHEAT

KWS Chilham This variety has shown lower protein levels than Mulika, but with a stronger gluten quality. The baking quality would not necessarily suit all end users.

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

KWS Giraffe This variety has shown similar quality to Mulika. The gluten quality is good, although there is some variability in its baking performance.

2

UKFM Group 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.

Elicit This variety has shown slightly lower Hagberg Falling Number and slightly weaker gluten than other Group 3 varieties, but meets the criteria for the group.

KWS Barrel This variety meets the Group 3 criteria.

KWS Brium (NEW) Over the three years of testing this variety met the Group 3 criteria

KWS Guium (NEW) Over the three years of testing this variety showed slightly lower absorption than other Group 3 varieties but met the Group 3 criteria

KWS Firefly 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.

LG Prince (NEW) Over the three years of testing, this variety met the Group 3 criteria, although its protein level was slightly lower than other Group 3 varieties.

Merit This variety meets the Group 3 criteria.

RGT Rashid (NEW) Over the three years of testing this variety met the Group 3 criteria.

3

UKFM Group 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, but are unlikely to attract a significant premium.
- Growers should avoid mixing hard and soft varieties.

Hard

Champion (NEW), Costello, Gleam, Graham, Hexham (spring), KWS Cranium, KWS Dawsum (NEW), KWS Fixum (NEW - spring), KWS Kerrin, KWS Kilburn (spring), KWS Talisker (spring), LG Typhoon (NEW), RGT Gravity, RGT Wolverine, SY Insitor, Theodore, WPB Escape (spring)

The spring varieties generally have higher protein contents.

Soft

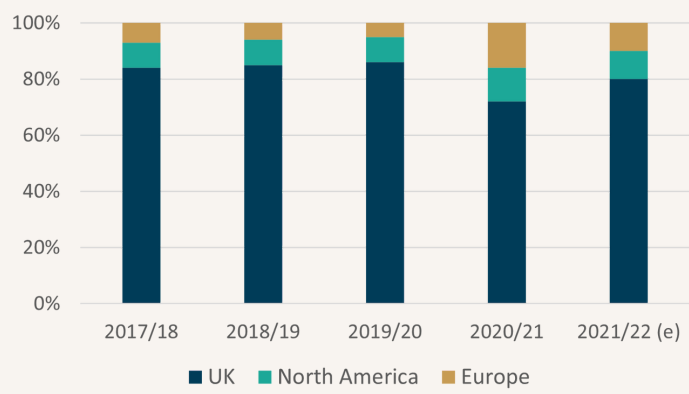
Elation, KWS Jackal, LG Skyscraper, LG Spotlight, RGT Bairstow (NEW), RGT Saki, RGT Stokes (NEW), Swallow

4



Supporting Britain's farmers

The UK's flour millers are one of the single biggest users of homegrown wheat. In a typical year they purchase around 4 million tonnes from Britain's cereal farmers.



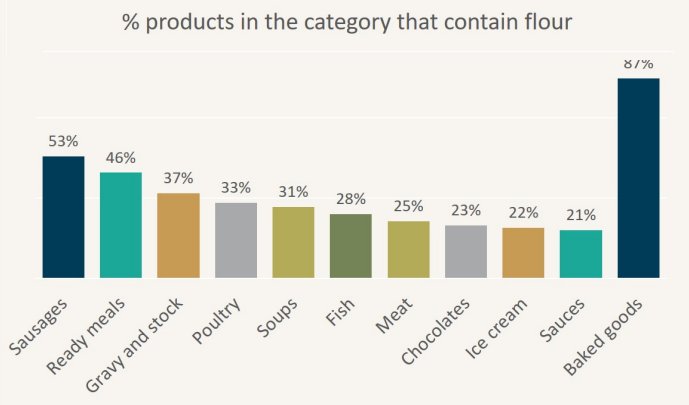
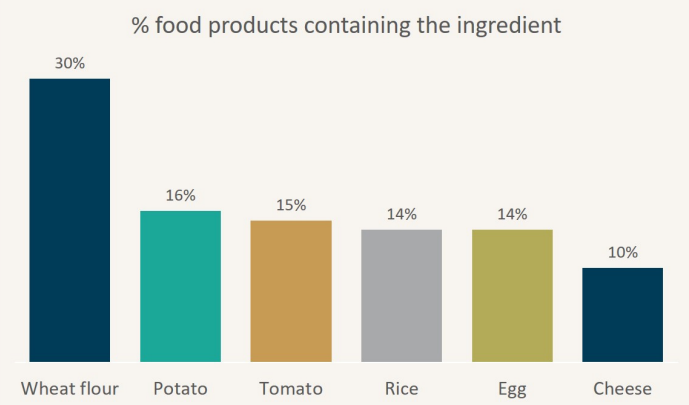
Find your market

There are 52 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 30% of the food lines available in UK supermarkets. Bakery goods obviously, but as illustrated below a significant proportion of meat and other products also contain wheat flour as an ingredient.



Nourishing the nation

Flour contributes significant quantities of vitamins and minerals, about one third of dietary fibre, calcium, and iron and one fifth of protein and other nutrients.

