

A thought bubble in the top left corner is filled with a close-up image of golden wheat grains.

Meeting end product quality requirements of Australian major wheat markets

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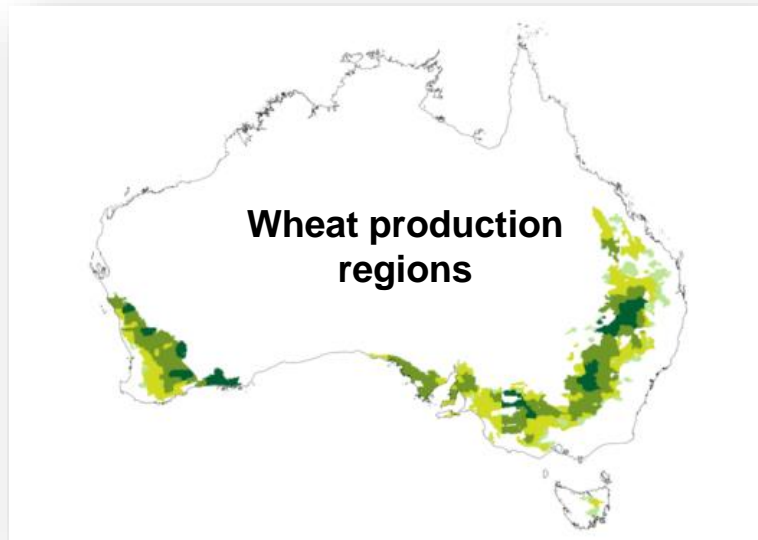
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Outline

- Australian major export markets
- Wheat quality requirements:
 - Indonesia
 - Japan
 - South Korea
 - Vietnam



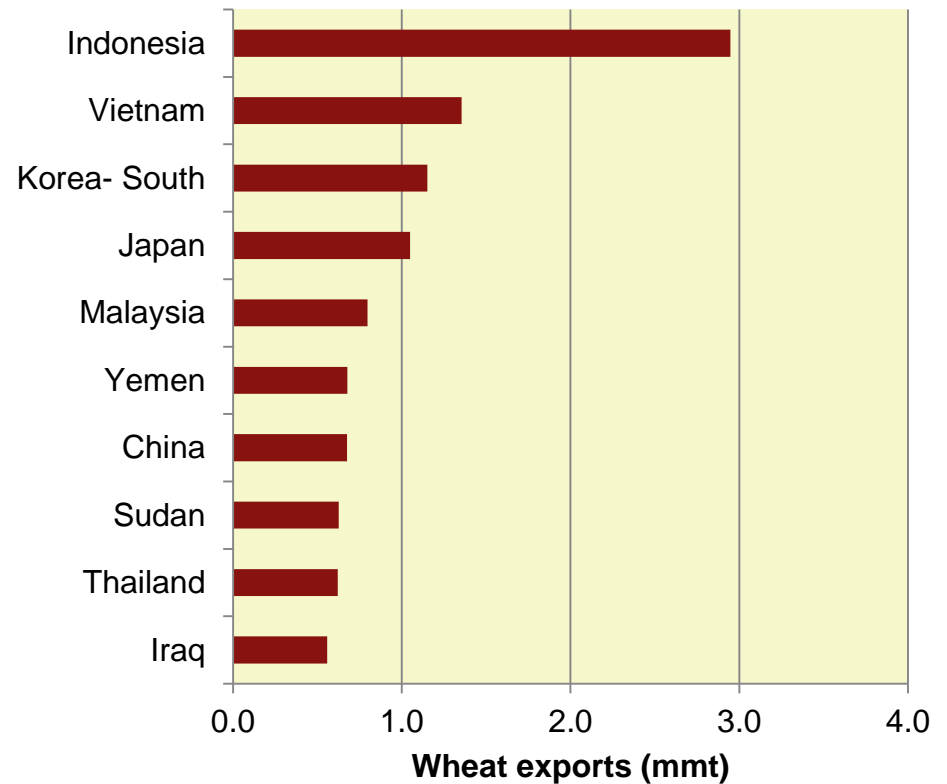
Australian wheat export



- Production: 26.5 mmt p.a.
- Export: 15 mmt (56%)
- Represents 10-15% global trade
- Largest export market: Indonesia

Wheat Exports

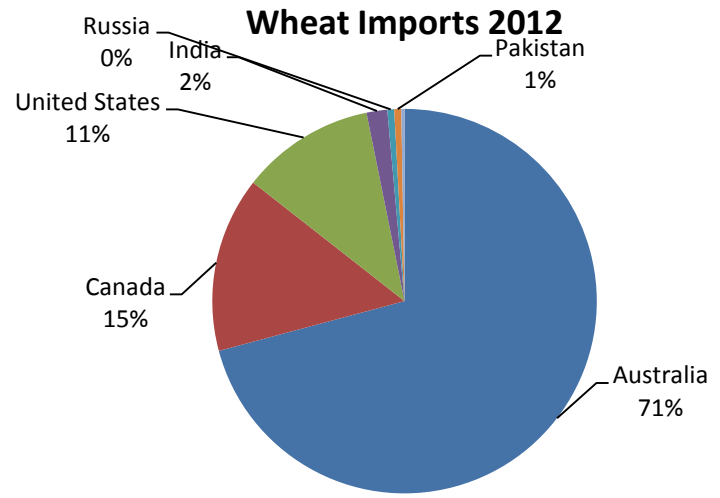
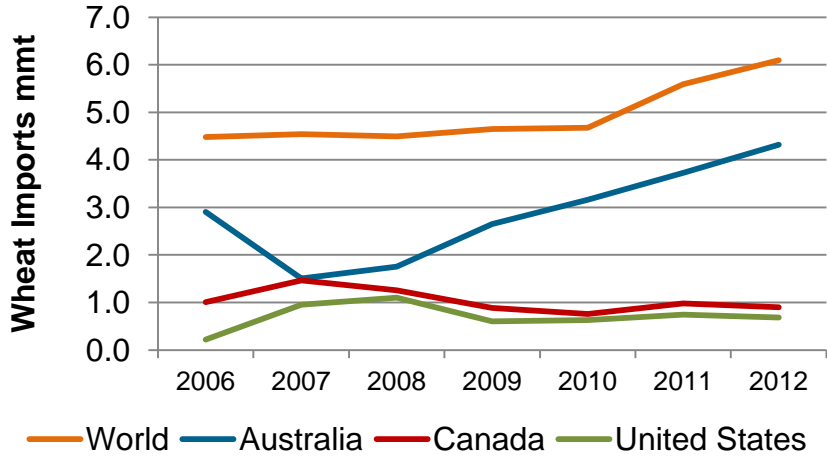
(Ave. 2007/08 - 2011/12)



Indonesia Market Snapshot

Population	244 million
Wheat consumption	18-22 kg/capita ↑
Total wheat consumption (2012)	6.35 mmt ↑

Indonesia Wheat Imports (mmt)



Product	Quality	Preferred classes
<p>Noodles</p> <ul style="list-style-type: none"> • fresh YAN  <ul style="list-style-type: none"> • Instant 	<ul style="list-style-type: none"> ▪ YAN <ul style="list-style-type: none"> • protein, wet gluten, firmness, chewiness • colour – bright, stable, yellow ▪ Instant <ul style="list-style-type: none"> • high starch swelling • firmness 	<ul style="list-style-type: none"> • AH, APW, • APW, AH, ASW
<p>Bread</p> 	<ul style="list-style-type: none"> • high protein, high WAbs%, high stability, good extensibility, good strength, high bread volume 	<ul style="list-style-type: none"> • DNS • CWRS
<p>Sponge Cake</p> 	<ul style="list-style-type: none"> • low protein, weak – medium dough strength, good volume, product symmetry, golden brown colour, soft & moist crumb 	<ul style="list-style-type: none"> • SWW • APW, ASW

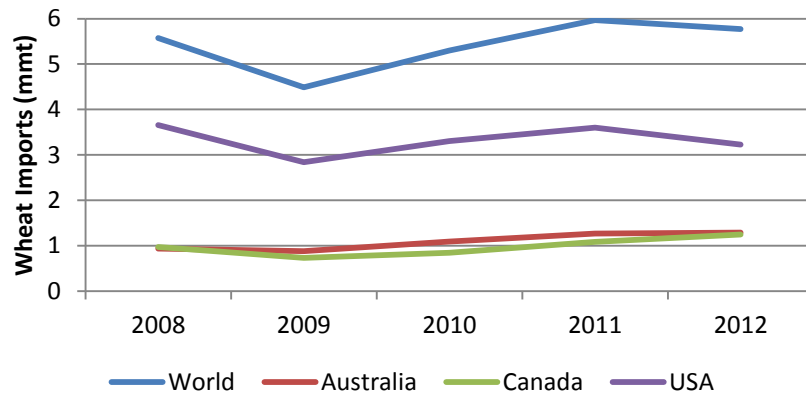
Japan Market Snapshot

Population 127 million

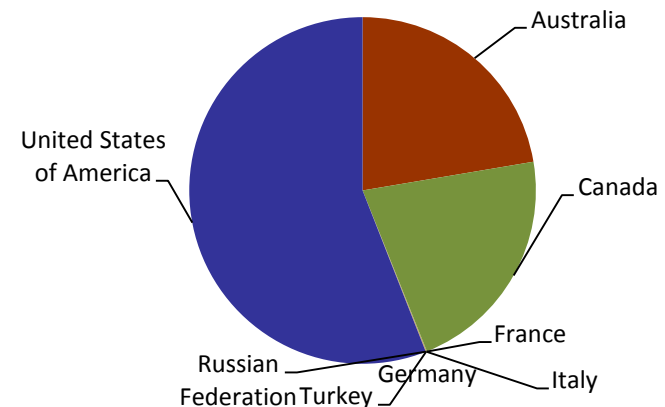
Wheat consumption 32.5 kg/capita


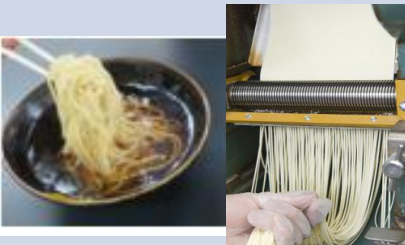


Total wheat consumption (2012) 6.5 mmt

Japan Wheat Imports (mmt)



Wheat Imports 2012



Product	Quality	Preferred classes
<p>Noodles</p> <ul style="list-style-type: none"> • Udon  <ul style="list-style-type: none"> • Ramen 	<ul style="list-style-type: none"> ▪ Udon <ul style="list-style-type: none"> • high flour swelling volume • medium protein (9.5-11.5) • low flour ash • creamy noodle colour & good colour stability ▪ Ramen <ul style="list-style-type: none"> • high protein • bright 'lemony' yellow noodle colour • low flour ash 	<ul style="list-style-type: none"> • ASWN Blend (ANW 60%+APW 40%) • Domestic Japanese Wheat • APH • DNS, CWRS
<p>Bread</p> 	<ul style="list-style-type: none"> • high protein, high WAbs%, high stability, good extensibility, good strength, low ash, high bread volume, white soft crumb 	<ul style="list-style-type: none"> • DNS • CWRS
<p>Sponge Cake</p> 	<ul style="list-style-type: none"> • low protein, weak – medium dough strength, good volume, product symmetry, golden brown colour, soft & moist crumb 	<ul style="list-style-type: none"> • SWW

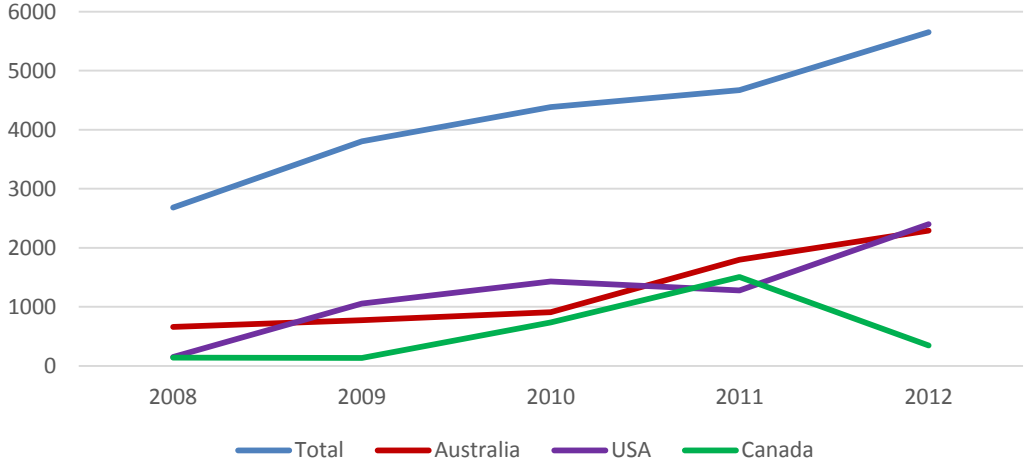
South Korea Market Snapshot

Population 50 million

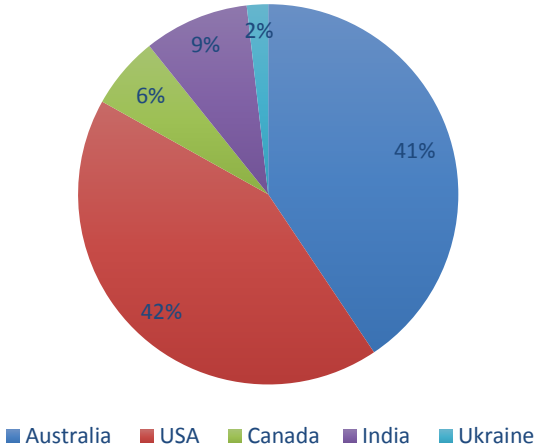
Wheat consumption 33.5 kg / capita





Total wheat consumption (2012) 5.6 mmt

Korea wheat imports (x 1000) mmt



Wheat imports 2012 (x 1000) mmt



Product	Quality	Preferred classes
<p>Noodles</p> <ul style="list-style-type: none"> • WSN  <ul style="list-style-type: none"> • Ramyon 	<ul style="list-style-type: none"> ▪ WSN <ul style="list-style-type: none"> • high flour paste viscosity • medium protein • low flour ash • bright noodle colour ▪ Ramyon <ul style="list-style-type: none"> • firmness, chewiness, stickiness • good paste viscosity • bright colour, low flour ash 	<ul style="list-style-type: none"> • ASWN Blend (ANW 30 % + APW 70%) • AH • AH • ASWN Blend
<p>Bread</p> 	<ul style="list-style-type: none"> • high protein, high WAbs%, good stability, good extensibility, high bread volume, white soft crumb 	<ul style="list-style-type: none"> • DNS
<p>Biscuits</p> 	<ul style="list-style-type: none"> • low protein, weak – medium dough strength 	<ul style="list-style-type: none"> • SWW

Vietnam Market Snapshot

Population	94 million
Wheat consumption	12 kg/ capita
Total wheat consumption (2012)	2.4 mt

- In 2012, Vietnam was the fourth largest market for Australian wheat (~ 2 mmt) > 90% of the market share
- Instant noodles and bread (French style baguette) main wheat flour based sectors
- Main wheat classes from Australia: APW, AH, APH, ASW

Summary / Key Messages

- **Australian wheat is used in many wheat based products in Asia**
- **Asian noodle sector is dominated by Australian wheat**
- **Asian baking sector is accustomed to North American wheats for baking: high protein, strong stable doughs, high volume bread**
 - **need for high quality functional wheats to compete effectively in international markets**
- **Noodle market – TO BE MAINTAINED**
- **Baking Sector – a challenge but also an OPPORTUNITY**

Thank You



Photo Source: CBH Group

AEGIC is an initiative of the Western Australian state government and the Grains Research and Development Corporation.



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