



Australian wheat quality for the Chinese market

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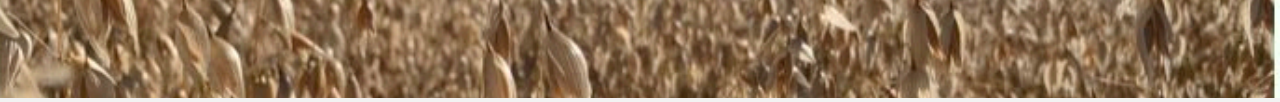
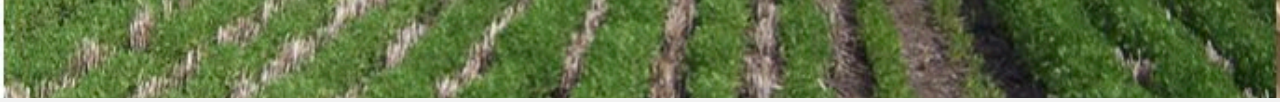


Presentation overview

- Wheat quality management
 - Wheat varietal classification
- Main milling classes and their intended uses
- Australian wheat for the Chinese market
 - Meeting customer requirements
- Acknowledgements



Grain quality management – the role of Grains Australia



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Receival standards (seasons)

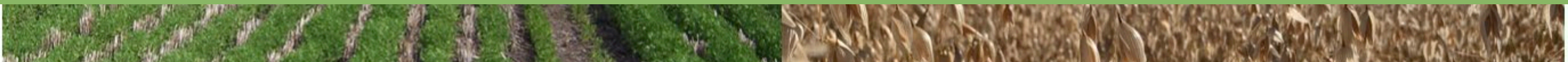


Classification (genetics)

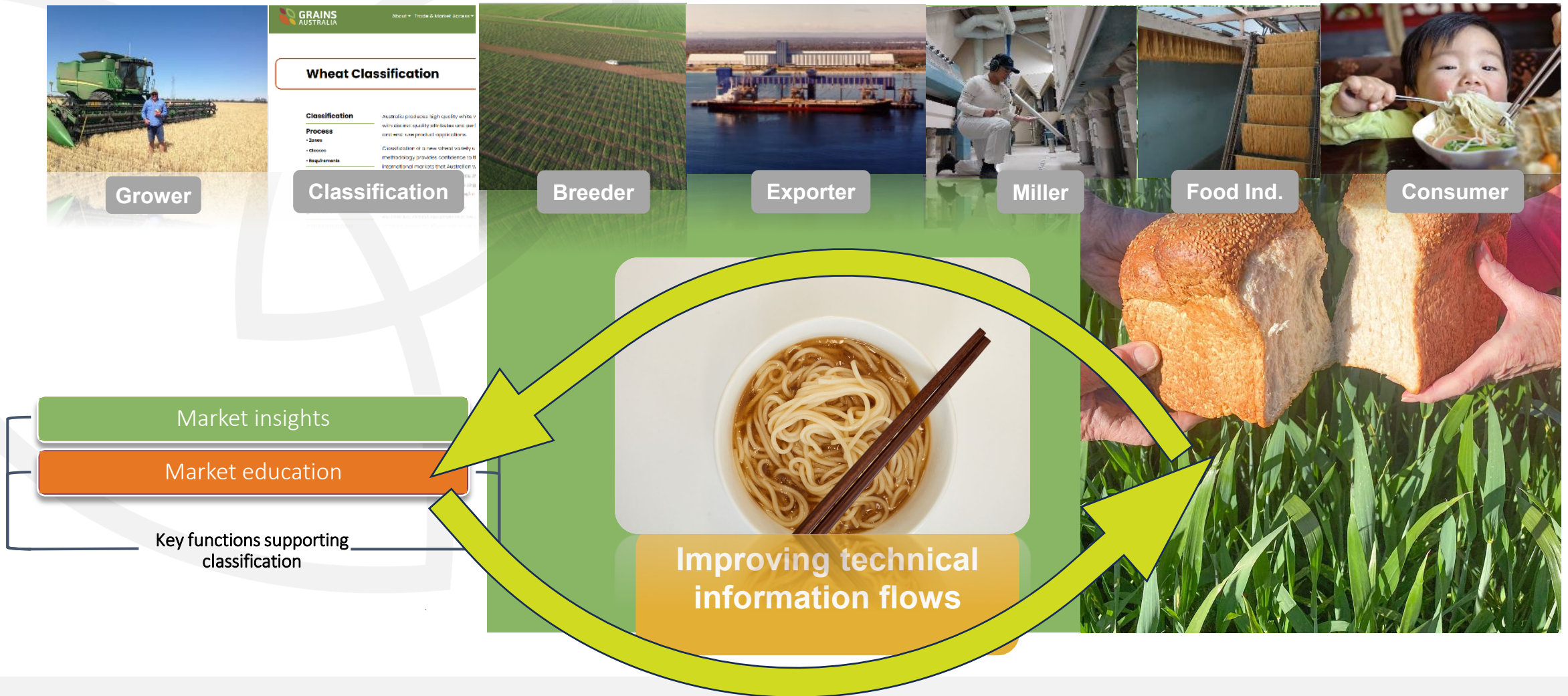




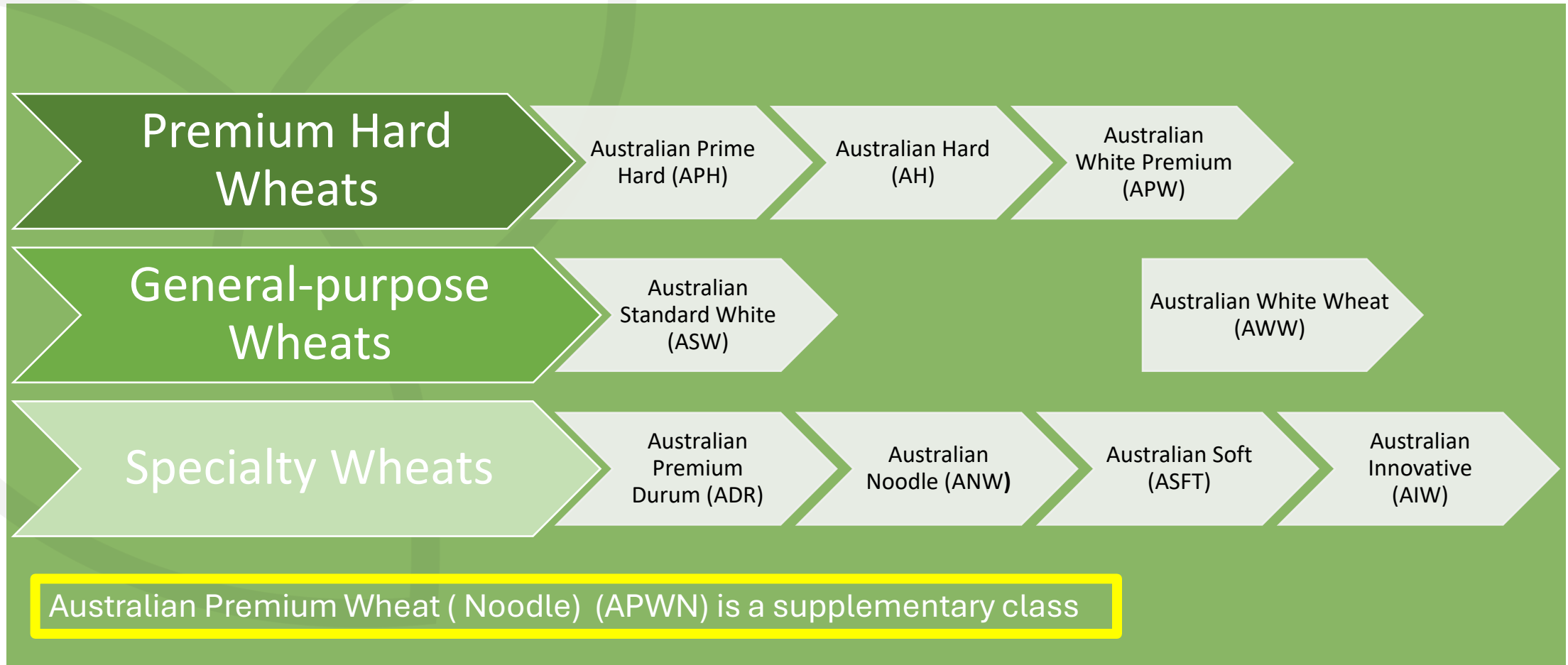
Wheat classification: main milling classes - focus on China



Classification: a customer-focused approach



Australian Wheat Classes



Wheat classification testing requirements



Australian
Prime Hard
(APH)

- **Australian Prime Hard (APH)**

- High volume bread and premium noodles (YAN and WSN)



Australian Hard
(AH)

- **Australian Hard (AH)**

- Various baked goods, premium quality noodle application (fresh, dried or instant)



Australian
White Premium
(APW)

- **Australian Premium White (APW)**

- Bread including flat and steam bread, noodles

Wheat classification testing requirements



Australian
Standard White
(ASW)

- **Australian Standard White (ASW)**
 - Steam bread, instant noodles, flat breads



Australian
Noodle Wheat
(ANW)

- **Australian Noodle Wheat (ANW)**
 - Udon noodles



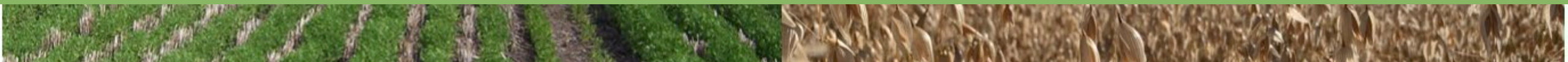
Australian Soft
(ASFT)

- **Australian Soft (AS)**
 - Biscuits, cookies, cakes





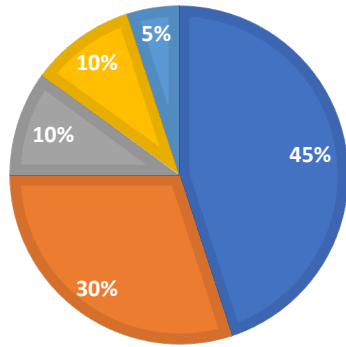
Wheat use in China – creating value with Australian white wheat



Wheat flour usage in China

TOTAL WHEAT FLOUR USAGE

■ noodles ■ steam buns ■ cakes and cookeis ■ pan bread ■ other



• Traditional Chinese Wheat Flour Products

- Estimated 80% of the market flour share
 - Noodles, dumplings and steamed products
 - Australian white wheat – well suited

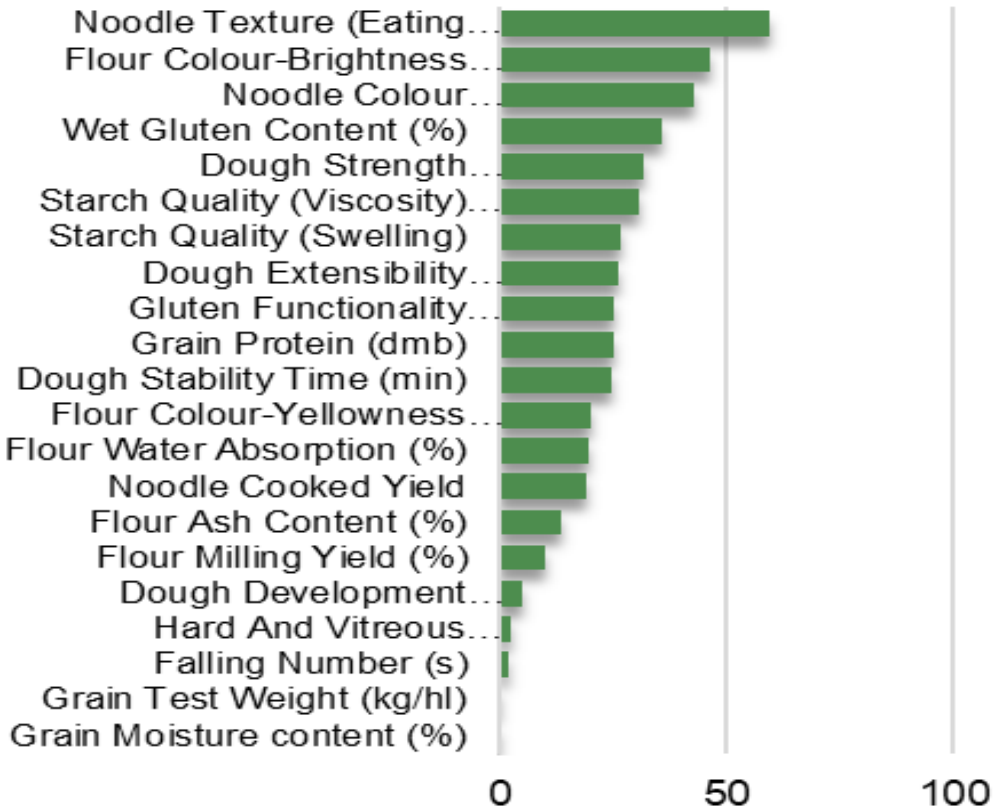
Western style Wheat Flour Products

- Western style baked goods (sandwich bread and cakes)
 - New opportunity with the development of Australian soft wheat

Wheat quality requirements for China

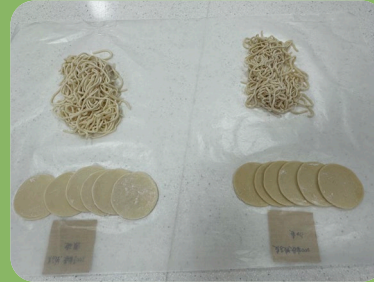
White Salted Noodles (WSN) – dried

■ Technical (N = 36)



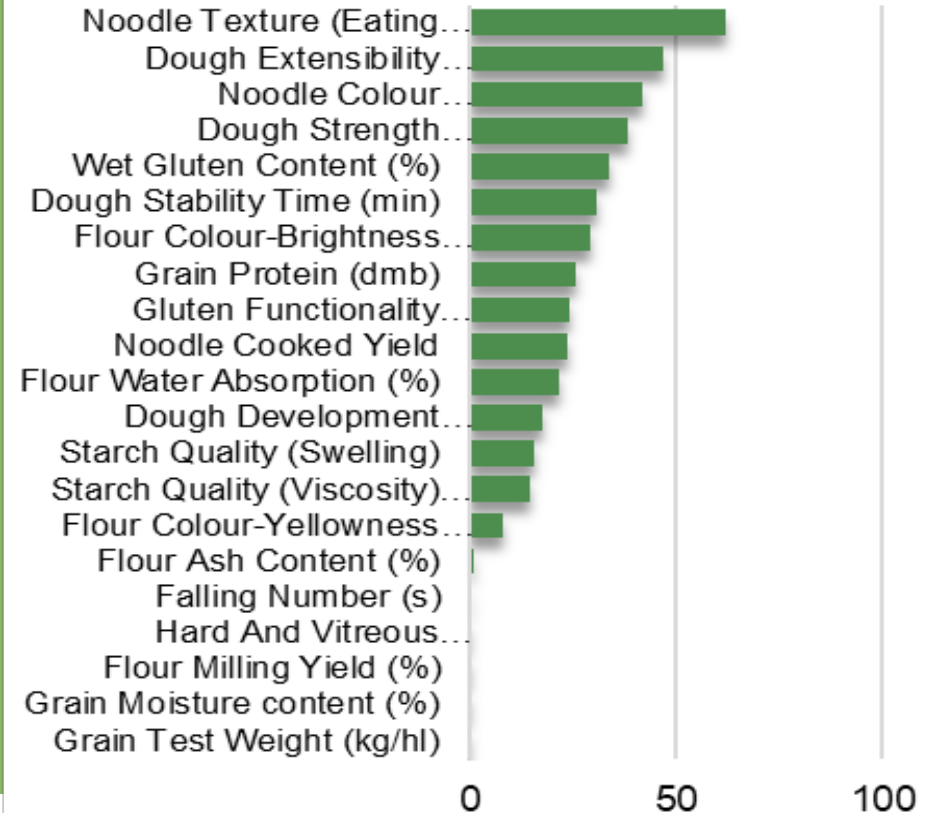
Market insights

Supporting development of wheat that better meets customer needs



Yellow Chinese (fresh) noodles

■ Technical (N = 21)



Wheat quality requirements for China

Steam Buns – Southern Style

■ Technical (N = 33)



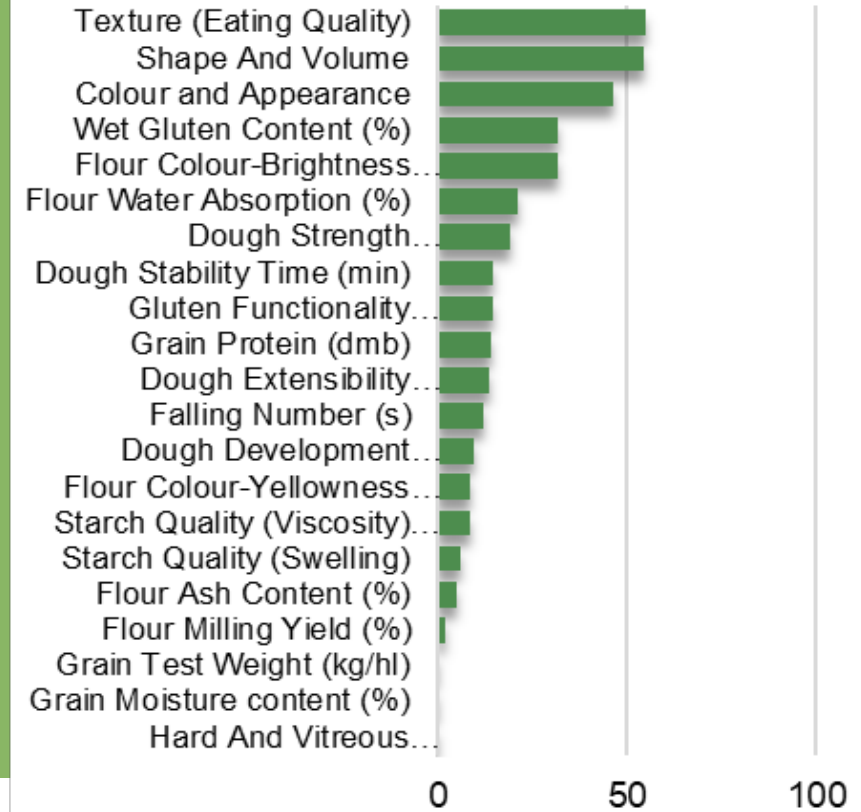
Market insights

Detailed quality preferences to inform breeding targets



Steam Buns – Northern Style

■ Technical (N = 24)



Wheat quality requirements for China



- **High protein wheat (APH and AH)**
 - **Gluten content**
 - Market preference to talk gluten rather than just protein content
 - Strength and stability – for baking but also noodles (firmer texture)
- **Hard wheat medium-low protein (ASW)**
 - Versatile application across range of products

Take home messages



- Australian White Wheat – well suited for range of Chinese traditional products
- Grains Australia investment to further understand Chinese quality requirements: ensures that Australian wheat continues to be a preferred choice for flour millers
- Grains Australia brings collaboration across the wheat supply chain and our key customers in China



Thank You



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