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Milling wheat

The quality conundrum

In a growing season which some have described as ‘savage’, many commentators believe the most profitable wheats on many farms have been Group 1s, with some varieties performing better than others. *CPM* explores the potential future of this market segment.

By Rob Jones

While Group 1 wheat varieties remain the cornerstone of UK flour millers’ demands, another challenging year and the drop in the UK wheat area once again highlight the challenges the sector faces, says KWS’ Dr Kirsty Richards.

Although the weather was warm, overall levels of sunlight were poor and disease was rife, so both yields and quality of all wheats have been variable, not just from region to region, but even field to field on the same farm, she continues.

“It’s certainly nowhere near a universal collapse of the UK crop, but there’s a wide range of variability out there which is prompting many to ask, what can we do to improve and safeguard the

viability for the UK milling wheat?

“We’re increasingly dependent on a small number of high quality milling wheats in Group 1 and when growing conditions are so variable, that lack of diversity is really tested,” suggests Kirsty.

Furthermore, many growers found it difficult to get nitrogen on at the right time because of wet weather with crops struggling to retain it, while brown rust levels were higher than usual due to above-average overnight temperatures, she says.

Quality concerns

“Although traders are forecasting around an 11-12M tonne wheat crop for the UK, the big question is, what condition is it in, as much of it was planted in less-than-ideal conditions.

“Given French and German crops were also affected by poor weather, supplies to millers will be tight and premiums for wheat which meets their stringent specifications will be high due to supply and demand pressures.

“The second question concerns grain quality – how have proteins formed; will specific weights be any good and what will Hagbergs be like? They’re important questions now, but they’ll continue to be repeated in the future,” adds Kirsty.

Jim Brennan, head of technical and regulatory affairs at UK Flour Millers, shares these concerns and points out that Group 1s remain the backbone of UK

flour millers’ demands, accounting for the majority of the homegrown wheat used.

“A Group 1 rating is only assigned to varieties which show consistent, good breadmaking functionality across seasons. This attribute is crucial as millers must meet very stringent requirements from customers on flour performance, while the quality of the crop varies significantly from year to year.



The UK is dependent on a small number of high quality milling wheats in Group 1 and when growing conditions are variable, that lack of diversity is tested, suggests KWS’ Dr Kirsty Richards.

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Zyatt's baking performance and versatility has been commended across a range of applications.

► “The drop in the wheat area is a major challenge for homegrown wheat supply. The AHDB planting and variety survey indicates the UK wheat area is down almost 10% on 2023 and is the second smallest in more than 40 years,” he says.

Group 1 wheats are particularly affected because these varieties have been declining as a proportion of the wheat area, steadily dropping from 31% in 2020 to an estimated 24% in 2024, suggests Jim.

But for Group 1 wheat it's not just production which affects availability, but also the proportion of the crop that achieves intake specification, he points out. “During the previous season only 13% of samples met the typical Group 1 milling specification of 13% protein, 250s Hagberg Falling Number, and 76.0kg/hl specific weight.

“While mill intakes are flexible in terms of the wheat they accept, for example, offering fallbacks for lower protein breadmaking wheat, there was a challenge in procuring wheat at the right headline quality and this has been reflected in near record milling premiums.”

The high milling premiums in the forward market indicate Harvest 2024 is expected to provide little relief to the

tight supply and demand for Group 1 wheat during the coming season, believes Jim.

“It's difficult to know the quality impact at this stage, but just as the extreme wet weather prevented many farmers from drilling wheat crops, it also restricted the ability to apply inputs at the right time. The low sunshine may also have an impact on protein levels.

“It's also difficult to know the yield impact given the relatively late, slow UK wheat harvest. Initial reports have been variable and if Western European wheat yields are an indicator, having suffered similarly poor weather conditions during the season, then expectations should realistically be set low,” he continues.

“The UK milling industry reliance on Group 1 varieties is not going to change. These are the crucial building blocks for breadmaking flour quality and will continue to make up the majority of our wheat demand.”

According to Jim, a Group 1 rating gives farmers the confidence to grow a variety knowing it'll be accepted by mills and achieve a premium providing the quality is achieved. “As a sector we're sometimes challenged on why we haven't assigned Group 1 ratings to new breadmaking varieties to

address the decline in popularity.

“But this misunderstands our quality assessment process, wherein a variety is tested in a controlled manner across three seasons and group ratings are assigned only on the basis of the observed quality and functionality.

“Fundamentally, a variety has to meet our functionality requirements for a Group 1 to be assigned, or confidence in the rating would be eroded,” he stresses.

Ensuring ROI

Kirsty points out that with Group 1 milling wheats costing around £141/ha more to produce than feed varieties, it's critical to achieve a much greater return from the additional investment. “With 80% of the potential crop production in-built in the seed, choosing the right variety for your situation is critical.

“Many growers focus on yield without considering the management attributes which define a variety's character, so consequently may fail to make the most of its full potential. Every farm is unique and every farming business has differing goals, making variety choice a personal decision.”

She adds that maximum output potential and profitability can only be achieved when a range of factors are considered, for example, rotational position, soil type, desired chemical spend, local markets and personal experience.

“Seed represents a very minor cost of production compared with other inputs such as chemical, labour and fuel. When a variety's potential is fully exploited, the return on investment will outperform that of any other input.”

Group 1 milling varieties are mostly grown as first wheats to maximise performance, but are also popular in the second wheat slot too, she adds. “This is because they tend to maximise grain quality and produce higher yields with better disease resistance than other cereals in this position.

“It's important to select the right variety for the selected drilling date due to the agronomic challenges. Take-all becomes the most apparent disease in second to fourth cereals, although Latitude (silthiofam) can be used as a risk management tool.”

According to Kirsty, it's hard to believe, but seven years after making its first appearance on the AHDB Recommended List in 2017, KWS Zyatt (KWS Quartz x Hereford) remains the highest yielding Group 1 winter wheat on the current RL.

“This, combined with its good protein levels and agronomics, means the variety continues to be a first choice for

professional milling wheat growers, many whom have favoured it from the outset.

“However, new and exciting Group 1 milling wheat are coming including SY Cheer, which has been delayed with the millers and will be assessed after harvest, together with KWS's potential high quality wheats KWS Vibe and KWS Beste, may offer good potential for the future.”

The message for autumn 2024 is to stick with what you know, however. Even with newer Group 1s in the pipeline she believes there are many reasons for continuing to choose Zyatt. “A key consideration is its consistent performance over different sites and seasons. This was highly significant in 2023/24, which brought substantial challenges.

“Its excellent physical grain package, including on-farm yields which are 2%



Jim Brennan from UK Flour Millers says high milling premiums in the forward market indicate Harvest 2024 will provide little relief to the tight supply and demand for Group 1s during the coming season.

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According to Duncan Durno, a fall in nitrogen price has improved the economics of growing milling wheats.

ahead of the next-best Group 1 wheat, is supported by the variety's tried and tested performance in the bakery, where Zyatt continues to deliver a wide range of top-quality bread products," she suggests.

Openfield Agriculture's arable technical manager, Duncan Durno, believes milling wheat production is back in the hands of specialist growers with the knowledge and experience to deliver what end-users require. "The declining market share of Group 1 varieties is reflected in the current premiums of £50-70/t which are on the table.

"These levels allow core milling wheat growers to achieve a significantly greater return – which rewards their additional investment, risk and expertise – which often hasn't been the case in the past. That's a good thing and I see that trend continuing for Harvest 2025."

Duncan says 2023/24 was a very difficult season in which all Group 1 wheat varieties faced challenges. "The adverse conditions last autumn which resulted in later drilling in some areas were compounded as soils remained wet through the winter months.

"During that time there were limited frosts to suppress foliar diseases, while a lack of sunshine in the spring meant some crops lost tillers early on and struggled to achieve their full yield potential. The lack of sunlight remained a factor right through to harvest.

"The bright spot was that nitrogen prices fell back significantly from their 2022 peak to approximately £1/kgN. This improved the economics of growing milling wheats which require 40-80kg/ha more than feed varieties to achieve the required protein."

Choosing which Group 1 variety to grow depends largely on individual farm conditions and risk tolerance, he points out. "Zyatt continues to be very popular

and many of our customers have stayed with the variety ever since it first made it onto the RL. They know what they're doing with the variety and how to manage it.

"In common with RGT Skyfall, Zyatt has a low yellow rust rating, so specialist milling wheat growers accept management of the crop will have to be spot on in terms of product selection and timing, and that they'll have to spend more to control the disease. It's not a big issue and these higher milling premiums justify the additional investment."

Yellow rust control

Where yellow rust is well controlled, Duncan feels Zyatt performs consistently. "Control measures have to start early with T0 products which are tailored to the disease – the fungicide programme through the season also has to reflect that.

"Zyatt will continue to be one of our staple Group 1 milling wheat varieties for 2024/25, along with Skyfall and LG Crusoe which is more susceptible to brown rust.

"Where a farming business is growing a large area of milling wheat we discuss the optimum balance between varieties to help them manage and mitigate disease risks as well as spread the sprayer's workload to ensure timely application," he says.

Changes in the bakery market are leading bakers and millers to take a more detailed approach to variety assessment that considers performance across a range of products, says Shaun Taylor, technical director of Rank Hovis Milling.

"Whereas the nabim assessment focuses on producing a sliced white loaf, commercial bakers want to know if a variety is suited to specialist products or processes. Characteristics

such as stickiness and elasticity of the dough, or product texture and volume, have different levels of importance depending on the process followed or products being produced.

"This is why bakers are increasingly talking about varieties rather than nabim groups. Bagel production, for example, is one of the most complex manufacturing processes in baking, so specific performance considerations for this application are particularly important," he says.

According to Shaun, Zyatt's baking performance and versatility are impressive across a range of applications. "It's a solid Group 1 variety with some unique qualities which extend its appeal to categories which are growing, such as sandwich thins, brioche and bagels.

"Rank Hovis has tested flour made from KWS Zyatt in a range of applications including white and wholemeal bread, morning rolls, pizza bases and bagels. We've been impressed with its versatility across a range of products where it either matched or outperformed the commercial flour controls.

"This is because we require varieties that perform across all applications rather than just the white loaf that we're used to," he comments.

As such, Duncan believes the range of Group 1 varieties available to growers could well increase in the future. "New Group 1 varieties are in the pipeline. Cheer will be assessed in September, while Vibe and Beste are RL candidates which appear to have good potential for the future.

"If those gain approval, then growers should benefit from higher yields with lower risk and costs," he concludes. ■



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