

## Noodle Wheat Outlook Western Australia

This industry update is provided by the Wheat Council of the Grain Industry Association of Western Australia Inc (GIWA) as at 8<sup>th</sup> February 2017.

Due to seasonal conditions, in December 2016 the GIWA Wheat Council raised concerns of possible lower protein levels for both APW and ANW with potential impacts on the Japanese and Korean noodle markets.

In respect of the Japanese noodle wheat market, pre-competitive industry (non-commercial) communications between the Western Australian noodle wheat industry, Ministry of Agriculture, Forestry and Fisheries Japan (MAFF) and the Japan Flour Millers Association (JFMA) follow an agreed protocol between MAFF and JFMA, and the Australian Export Grain Innovation Centre (AEGIC) on behalf of its shareholder the Department of Agriculture of Food WA (DAFWA), the Wheat Council of the Grain Industry Association of Western Australia Inc (GIWA), and Cooperative Bulk Handling (CBH).

Post-harvest, the industry estimate for total grain production in Western Australia for 2016/2017 is approximately 18.0 million tonnes (16.6 million tonnes inside the CBH bulk handling system), including 10.0 million tonnes of wheat. Noodle wheat production is estimated to be 9% of total wheat production.

Acknowledging that tenders are a commercial matter between the trade and end customers, in late 2016 the GIWA Wheat Council proposed the following potential solutions for managing this situation for any new crop wheat shipped from Australia:

- Lowering of the minimum protein specification of the noodle wheat blend; and
- Consideration of the APW1 grade as an allowable grade in the noodle wheat blend to Japan.

In response, delegates from the MAFF and JFMA met with WA grains industry representatives in December 2016 to discuss this seasonal issue.

**In late January 2017, MAFF Japan confirmed that the MAFF noodle wheat tender will resume from February 2017 with the following specifications for this season only:**

- **A revised minimum noodle wheat protein blend of 9.7% (previous minimum 10.0%);**
- **Inclusion of APW1 as an allowable grade in the noodle wheat blend.**

**This outcome avoided the need to change the ASW blend ratio, which remains the same.**

This tender variation is a positive outcome for the WA grain industry because it maintains continuity of supply into a valued market.

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