Malting Barley Breakfast - Haddington
*Insight to enhance your business*

**Wednesday 4 February 2015**
7:45 – 12:00
Malting barley market outlook

Helen Plant
AHDB Market Intelligence
The world’s feed grain supply issues are over (for now)...

**Global grain supply & demand**
- Wheat & coarse grain production
- Wheat & coarse grain utilisation

**UK grain prices**
- UK feed wheat futures
- Scottish ex-farm feed wheat
- Scottish ex-farm feed barley

*estimate*, **forecast   Source: FAO     Source: ADHB/HGCA
Global barley S&D – bucking the trend of the broader grain market, but a price follower

Source: USDA
Global barley production – unlikely to be talking about record global crop any time soon

Source: USDA
Global barley perspectives
- who’s going to cash in on the niche?

**Canada:** Acreage decline – new lows

**EU:** The powerhouse of production

**Russia & Ukraine:** Established exporters - proximity to demand

**Saudi Arabia:** The dominant importer

**Argentina:** The emerging exporter, now retreating

**China:** Growing importer

**Australia:** Competitive exporter
Barley has been the biggest loser in Canada – planted area down 2.2M ha in 20 years

Source: Statistics Canada
EU barley S&D – a congested EU feed grain market = stock build, but not to 2009/10 levels

Source: EU Commission
Malting barley export prices — Canadian / French quality issues as well as export demand lending support to European malting premiums

Source: RM Analytics, AHDB/HGCA
UK barley production – first time production at 7Mt for two years running since late 1990’s

Source: Defra
Currency movements represent both a challenge and an opportunity.

<table>
<thead>
<tr>
<th>Index (Jul 2012 = 100)</th>
</tr>
</thead>
<tbody>
<tr>
<td>£ vs Euro</td>
</tr>
</tbody>
</table>

Source: AHDB/HGCA
UK set for third consecutive large barley crop? - consequence of economics, black-grass & new CAP rules but regional differences likely

**Early Bird Survey forecast, The Andersons Centre**
Summary / final thoughts

• **EU the current ‘go to’ origin for malting barley**
  - the UK has the opportunity to benefit directly from the strength of current EU barley exports

• **UK barley market seems to be bucking against the global production trends**

• **Third UK large barley crop in 2015??**

• **Expect more volatile premiums in future - risk of spring weather extremes to quality**
Today’s headlines...

Comeback for Russian wheat into export market
Russia has taken advantage of the weakening of its currency, along with the rise in global grain prices, to re-enter the wheat export market this week.

Putting October’s grain price gains in perspective
We also put October’s price gains for global grains into perspective.

Click here to read more on these on the HGCA Markets website

Brenda Mullan, Analyst, AHDB/HGCA Market Intelligence
Brenda.mullan@ahdb.org.uk, 02476 473982

London feed wheat futures

Previous GMD’s

Yesterday (20 Oct): Strong European meme and supporting US soybean prices

Wednesday (20 Oct): Rumours surround Russia’s 2015 wheat crop

Tuesday (28 Oct): All eyes on maize

Recently on

www.hgca.com/markets

World maize Futures progress - delays for the EU and US

Analyst’s Insight: The psychology of great expectations

Prospects: Global grain exports to decline in 2014/15

Grain Market Outlook Conference 2014

Click here to watch the video, or alternatively read the papers by clicking here.

Grain Market Daily

29 October 2014

Anna Lockwood, Research Analyst, AHDB/HGCA Market Intelligence
Anna.lockwood@ahdb.org.uk, 02476 476598

Rumours surround Russia’s 2015 wheat crop

Speculation around the potential success of Russia’s 2015 wheat crop is already dominating headlines. Concerns have been sparked by reports of the establishment of the autumn planted wheat crop for the major exporter, which has been reported as being in “extremely weak condition” (Sporcle). Furthermore, the weakening ruble is raising the possibility of higher input costs for spring planting.

The latest MINARS crop monitoring report from the EU commission (Released 27 October) has reported colder than usual conditions for Western Europe (see below) until 1 November, which is likely to spur further concerns over the condition of the winter wheat crop.

Typically, around half of the Russian wheat area is winter wheat, although the varieties vary by region. Winter wheat remains a risk for winter planted crops, particularly those that are poorly established as snow cover does not provide sufficient insulation from the low winter temperatures.

Although these early reports have been creating some support for the market, albeit short term, it remains too early for assumptions to be made around yields just yet. Spring planting conditions will provide more of an insight into the 2015 crop and also provide a more realistic judgement of how well the winter crop has fared.

AVERAGE DAILY TEMPERATURE

EU/AFRC operational model starting 24 October 2014

Average values

-1 - 0°C: 10.5°C
-2 - 1°C: 10.5°C
-3 - 2°C: 9.8°C
-4 - 3°C: 9.5°C
-5 - 4°C: 9.5°C
-6 - 5°C: 9.7°C
-7 - 6°C: 9.9°C

No difference

Legend: Occurrence: 4.7%
Market requirements from a maltster’s perspective

Eddie Douglas – Commercial Director
Bairds Malt Ltd
Malting Barley Production and Purchases
Scottish Cereal Production

(1) Includes Triticale
Revision to methodology applied from 2003 onwards
MAGB Scottish Malting Barley Purchases

Tonnes

- Winter
- Spring
- Total
Malt Market
UK malt supply by sector – Free market

Source: MAGB Industry data

<table>
<thead>
<tr>
<th>Year</th>
<th>Brewing</th>
<th>Distilling</th>
<th>Food</th>
<th>Export</th>
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<tbody>
<tr>
<td>2006</td>
<td>500</td>
<td>400</td>
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<td>2007</td>
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<td>2008</td>
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<tr>
<td>2009</td>
<td>450</td>
<td>350</td>
<td>150</td>
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<tr>
<td>2010</td>
<td>500</td>
<td>400</td>
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<tr>
<td>2011</td>
<td>450</td>
<td>350</td>
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<tr>
<td>2012</td>
<td>550</td>
<td>450</td>
<td>150</td>
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</tr>
<tr>
<td>2013</td>
<td>600</td>
<td>500</td>
<td>200</td>
<td>200</td>
</tr>
</tbody>
</table>

Source: MAGB Industry data
UK beer sales (,000hl)

- Forecast volumes showing signs of arresting decline

Source: BBPA

26% decrease from 2004 to 2012
Scotch whisky sales
(million litres of pure alcohol)

Sutherlands forecast of ~2.5% growth pa 2014 to 2016

Source: Sutherlands
Usage of UK Produced Malt (2014 Est.)

- Distilling: 56%
- Brewing: 30%
- Export: 11%
- Food: 3%

[Logos: MAGB, HGCA]
Usage of Scottish Produced Malt (2014 Est.)

- Distilling: 94%
- Brewing: 3%
- Export: 3%
- Food: 0%
Malting Barley Specifications
Importance of Barley Specification

- High quality malt requires high quality malting barley

- Malting barley specification ensures that customer malt specification requirements can be achieved

- Ensuring that the malting barley delivered meets specification is key control activity
Quality Requirements

• Germination – 98% min

• Grain size – <10% thru 2.50mm

• Grain nitrogen – Wish list

• Admixture

• Food Safety
Importance of Germinative Capacity

- Germinative capacity measures the viability of the barley
- The changes that convert barley to malt wholly dependent on the grains ability to germinate
- Non-viable grains do not germinate and pass through the malting process unchanged
- These non-germinated grains will have a significant detrimental effect on malt quality
Importance of Moisture Content

• Risk that high moisture barley may have damaged germinative capacity
  • Harvest intake – up to 19.0% with weight correction only.
  • Deliveries post 31st October must be max 14.5%.

• Storage of high moisture barley for even short time period can result in fungal growth and possible mycotoxin formation – see HGCA Grain Storage Guide and Safe Storage Matrix

• Legal limits in place for ochratoxin A (OTA) which may be result from fungal growth
Importance of Grain Size

• Small grains will be lost during pre processing grading of the malting barley

• Small grains higher in nitrogen, low in extract

• Small grains hydrate rapidly so would give uneven moisture levels if steeped along with std malting barley grains

• Uneven steeped moisture levels would result in uneven modification levels in the germinated malt
Importance of Nitrogen Content

• Correct nitrogen content of resultant malt important for distilling/brewing performance

• Customer sets acceptable malt nitrogen range based on their product type and process
Nitrogen “Wish List” 2015 Scotland

- Spring below 1.55%: 39.9%
- Spring 1.56 - 1.65%: 49.6%
- Spring above 1.85%: 0.3%
- Winter 1.56 - 1.65%: 2.9%
- Winter 1.66 - 1.85%: 1.6%
- Winter above 1.85%: 5.7%
Importance of Other Specification Items

• **Admixture**
  • Important to keep foreign material out of the malting and brewing process

• **Varietal purity**
  • Individual varieties will require specific processing conditions to optimise malt quality

• **Pregerminated/split/skinned grains**
  • Damage of this nature renders the grain problematic to handle and malt leading to poorer malt quality
Field mycotoxins

• Legal maximum levels apply to DON and ZEA when cereals are offered to the market – due diligence analysis programmes are run by malting companies

• Maltsters are also participating in UK data collection of levels of T-2 and HT-2 mycotoxins
Varieties
## IBD Approved List Harvest 2015

<table>
<thead>
<tr>
<th>Full Approval</th>
<th>WINTER VARIETIES FOR BREWING USE</th>
<th>SPRING VARIETIES FOR BREWING USE</th>
<th>SPRING VARIETIES FOR MALT DISTILLING USE</th>
<th>SPRING VARIETIES FOR GRAIN DISTILLING USE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Pearl Flagon</td>
<td>Concerto</td>
<td>Belgravia</td>
<td>Belgravia</td>
</tr>
<tr>
<td></td>
<td>Cassata Venture</td>
<td>NFC Tipple</td>
<td>Concerto</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Propino</td>
<td>Moonshine</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Odyssey</td>
<td>Optic</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Belgravia</td>
</tr>
<tr>
<td>Provisional Approval 2</td>
<td>Talisman</td>
<td>Sanette</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Provisional Approval 1</td>
<td>KWS Irina</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Full Approval: Pearl Flagon, Cassata Venture

Provisional Approval 2: Talisman

Provisional Approval 1: KWS Irina
# HGCA Recommended List 2015/16

## Winter malting varieties

<table>
<thead>
<tr>
<th>Variety</th>
<th>Breeder</th>
<th>Parentage</th>
<th>HGCA Recommendation</th>
<th>IBD Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>Talisman</td>
<td>Senova</td>
<td>Flagon x Retriever</td>
<td>Full UK</td>
<td>Prov 2 Brewing</td>
</tr>
<tr>
<td>SY Venture</td>
<td>Syngenta</td>
<td>DH9525 x Retriever</td>
<td>Full UK</td>
<td>Full Brewing</td>
</tr>
<tr>
<td>Cassata</td>
<td>Limagrain</td>
<td>Opal x NSL 96/7517</td>
<td>Specific (BaYMV)</td>
<td>Full brewing</td>
</tr>
<tr>
<td>Flagon</td>
<td>Syngenta</td>
<td>(NFC296-7 x Rifle) x Pearl</td>
<td>Full UK</td>
<td>Full brewing</td>
</tr>
<tr>
<td>Pearl</td>
<td>Limagrain</td>
<td>Puffin x Angora</td>
<td>Full UK</td>
<td>Full brewing</td>
</tr>
<tr>
<td>Variety</td>
<td>Breeder</td>
<td>Parentage</td>
<td>HGCA Recommendation</td>
<td>IBD Approval</td>
</tr>
<tr>
<td>-------------</td>
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<td>----------------------</td>
<td>---------------------------</td>
</tr>
<tr>
<td>RGT Planet</td>
<td>RAGT</td>
<td>Tamtam x Concerto</td>
<td>Full UK</td>
<td>Under evaluation</td>
</tr>
<tr>
<td>KWS Irina</td>
<td>KWS UK</td>
<td>Conchita x Quench</td>
<td>Full UK</td>
<td>Prov 1 brewing</td>
</tr>
<tr>
<td>Sanette</td>
<td>Syngenta</td>
<td>Summit x Yard</td>
<td>Full UK</td>
<td>Prov 2 brewing</td>
</tr>
<tr>
<td>Olympus</td>
<td>Limagrain</td>
<td>Genie x Tesla</td>
<td>Full UK</td>
<td>Under evaluation</td>
</tr>
<tr>
<td>Deveron</td>
<td>Limagrain</td>
<td>Genie x Tesla</td>
<td>Full UK</td>
<td>Under evaluation</td>
</tr>
<tr>
<td>Sienna</td>
<td>Limagrain</td>
<td>Chronicle x Genie</td>
<td>Full UK</td>
<td>Under evaluation</td>
</tr>
<tr>
<td>Vault</td>
<td>Syngenta</td>
<td>NFC Tipple x Shuffle 409-202</td>
<td>Full UK</td>
<td>Under evaluation</td>
</tr>
<tr>
<td>Octavia</td>
<td>Limagrain</td>
<td>Odyssey x SY Universal</td>
<td>Full UK</td>
<td>Under evaluation</td>
</tr>
<tr>
<td>Odyssey</td>
<td>Limagrain</td>
<td>Concerto x Quench</td>
<td>Full UK</td>
<td>Full brewing &amp; malt distilling</td>
</tr>
<tr>
<td>Propino</td>
<td>Syngenta</td>
<td>Quench x NFC Tipple</td>
<td>Full UK</td>
<td>Full Brewing</td>
</tr>
<tr>
<td>Quench</td>
<td>Syngenta</td>
<td>Sebastian x Drum</td>
<td>Full UK</td>
<td>No longer approved</td>
</tr>
<tr>
<td>Moonshine</td>
<td>RAGT</td>
<td>Toucan x Class</td>
<td>Full North</td>
<td>Full malt distilling</td>
</tr>
<tr>
<td>Concerto</td>
<td>Limagrain</td>
<td>Minstrel x Westminster</td>
<td>Full UK</td>
<td>Full brewing &amp; malt distilling</td>
</tr>
<tr>
<td>NFC Tipple</td>
<td>Syngenta</td>
<td>(NFC 497 x Cork) x Vortex</td>
<td>Full UK</td>
<td>Full brewing</td>
</tr>
<tr>
<td>Optic</td>
<td>Syngenta</td>
<td>Chad x (Corniche x Force)</td>
<td>Full North</td>
<td>Full malt distilling / No longer approved for brewing</td>
</tr>
<tr>
<td>Belgravia</td>
<td>Limagrain</td>
<td>Minstrel x Westminster</td>
<td>Full North</td>
<td>Full malt &amp; grain distilling use</td>
</tr>
</tbody>
</table>
Additional varieties used by the market

- Varieties that are also used by the industry to cover specific maltsters niche requirements:
  - Brioni
  - Catriona
  - Chronicle
  - Golden Promise
  - Maresi
  - Minstrel

These varieties are grown under specific buy-back contract agreements.
Malting variety purchases

Scottish Spring Barley Purchased – 2009 to 2014 Crop
(Data Source: MAGB Malting Barley Purchasing Return)

Scottish Spring Barley Purchased – 2009 to 2014 Crop
(Data Source: MAGB Malting Barley Purchasing Return)
Malting Barley Prospects 2015
Scottish Malting Barley Prospects 2015 crop

• Increased spring barley demand due to distilling expansion

• Variety and nitrogen will depend on target market
  • **Distilling**
    • Pot still malt – spring barley, low nitrogen – below 1.65N₂
    • Grain malt – spring barley, high nitrogen – above 1.85N₂
  • **Brewing**
    • Brewing can use both winter and spring barley with a range of nitrogen up to 1.85N₂

• Distillers prefer non GN varieties
  • Concerto, Belgravia, Odyssey etc.

• Each maltings/intake point will have their own specific variety requirements – please check with your merchant
Getting the most out of barley

A technical update covering the management of grain skinning, nitrogen and varieties

Steve Hoad, Crop Science Team Leader
SRUC
Outline

- Meeting the specification
  - Grain nitrogen
  - Physical defects
- Variety review
  - Current position
  - What’s coming through?
Crop responses to nitrogen fertiliser

HGCA Project Report No. 484 (2012)
The relationship between soil mineral nitrogen, applied nitrogen and yields in Scottish soils (Scottish Agronomy)
Crop responses to nitrogen fertiliser

Range of grain yield and grain N% responses to N fertiliser
Scottish spring malting barley – meeting specification

- Nitrogen Content % d.m.
- Distilling Nitrogen limit
- Screenings Percent Through 2.25mm

Grain Nitrogen %

Screenings % (2.25mm screen)

Introduction: Grain skinning

- Grain skinning is detachment of the husk from the caryopsis
- Reduces malting efficiencies and affects the wider supply chain
- Husk adhesion requires a lipid cementing layer between the husk and caryopsis
- Significant varietal and environmental influences
Grain skinning: How to score

When the husk has detached from the caryopsis, a grain is “skinned”

RD-2012-3804
“Supporting UK malting barley with improved market intelligence on grain skinning”
Wide range in grain skimming (0% to 37%). Some RL varieties performing poorly. Even in a low skimming year, the varietal range was still wide.
Effects of variety, nitrogen, fungicide and PGR on grain skinning

Variety and nitrogen fertiliser had stronger effect than +/- fungicide or PGR

Preliminary results, SRUC trial harvest 2014
Late harvested crops tend to have increased levels of skinning

Trials funded by Loirston Trust, scoring funded by HGCA
Progress: Are combine settings a key factor?

A faster drum speed (Fig. 3A) and tighter concave (Fig. 3B) increased skinning

**Fig. 3**  
A. Combine drum speed  
B. Concave, 5 = tightest

![Graph A: Combine drum speed](image1)  
![Graph B: Concave setting](image2)
Spring barley area – Scotland

Spring barley area, 1000’s ha
# Malting spring barley – Market leaders

<table>
<thead>
<tr>
<th>Variety</th>
<th>Status</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Concerto</td>
<td>R</td>
<td>Market leader. Yield becoming outclassed</td>
</tr>
<tr>
<td>Optic</td>
<td>O</td>
<td>In its 20\textsuperscript{th} year. Nearly 10% market in 2014</td>
</tr>
<tr>
<td>Belgravia</td>
<td>R</td>
<td>The main GD variety, but declining</td>
</tr>
<tr>
<td>Moonshine</td>
<td>R</td>
<td>Niche market</td>
</tr>
<tr>
<td>Odyssey</td>
<td>R</td>
<td>Increasing interest, compare with Concerto</td>
</tr>
<tr>
<td>Propino</td>
<td>R</td>
<td>Good variety; brewing and feed use</td>
</tr>
<tr>
<td>Sanette</td>
<td>P2</td>
<td>Very high yielding brewing variety</td>
</tr>
<tr>
<td>KWS Irina</td>
<td>P2</td>
<td>Very high yielding brewing variety</td>
</tr>
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## Malting spring barley – Key changes

<table>
<thead>
<tr>
<th>Variety</th>
<th>Status</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Olympus</td>
<td>P1</td>
<td>Potential for D and GD</td>
</tr>
<tr>
<td>Sienna</td>
<td>Defer</td>
<td>All have some potential for malt distilling</td>
</tr>
<tr>
<td>Deveron</td>
<td>Defer</td>
<td></td>
</tr>
<tr>
<td>Vault</td>
<td>Defer</td>
<td></td>
</tr>
<tr>
<td>Octavia</td>
<td>Defer</td>
<td></td>
</tr>
<tr>
<td>RGT Planet</td>
<td>Defer</td>
<td>Very high yielding brewing variety</td>
</tr>
<tr>
<td>Overture</td>
<td>Off</td>
<td></td>
</tr>
<tr>
<td>Glassel</td>
<td>Off</td>
<td>No market interest</td>
</tr>
<tr>
<td>Shaloo</td>
<td>Off</td>
<td></td>
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</tbody>
</table>
Odyssey

- Full IBD Approval for brewing and distilling
- Yields 6% above Concerto – some variable performance on farms in 2014
- Straw strength and maturity similar to Concerto
- Good resistance against brackling
- Intermediate rating for *Rhynchosporium* resistance
Olympus

- New, very high yielding malting variety
- Under test for malt distilling and grain distilling
- Yields 10% above Concerto
- Straw strength better than Concerto and Odyssey
- Brackling risk is intermediate, rather than good
- Towards being weak for Ramularia
Malting spring barley – Notes

Sienna, Vault and Octavia

- Under test for malt distilling and brewing
- All are high yielding; Octavia is slightly earlier, but a little weaker for brackling

Deveron

- Under test for malt distilling (but not for brewing)
- Very high yielding
### Feed spring barley – Key changes

<table>
<thead>
<tr>
<th>Variety</th>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Waggon</td>
<td>R</td>
<td>Early, well adapted variety</td>
</tr>
<tr>
<td>Westminster</td>
<td>Off</td>
<td>Low yielding, some niche use</td>
</tr>
<tr>
<td>Shada</td>
<td>Off</td>
<td>Doesn’t offer anything new</td>
</tr>
<tr>
<td>Scholar</td>
<td>P1</td>
<td>New. Very high yield.</td>
</tr>
</tbody>
</table>
Malting spring barley – Notes

Scholar

- New feed variety; very high yielding
- Good untreated yield; includes a provisional [8] for Ramularia
- A little later to mature than Waggon
- 5 cm shorter than Waggon
- Very good resistance to brackling
# Malting winter barley

<table>
<thead>
<tr>
<th>Variety</th>
<th>Status</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cassata</td>
<td>S</td>
<td>Both used in 2014</td>
</tr>
<tr>
<td>Pearl</td>
<td>S</td>
<td></td>
</tr>
<tr>
<td>SY Venture</td>
<td>Defer</td>
<td>Small interest in 2014</td>
</tr>
<tr>
<td>Talisman</td>
<td>Defer</td>
<td>Wait and see</td>
</tr>
</tbody>
</table>
## Two-row feed winter barley

<table>
<thead>
<tr>
<th>Variety</th>
<th>Status</th>
<th>Status Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retriever</td>
<td>O</td>
<td>Yield still okay, but newer varieties are better</td>
</tr>
<tr>
<td>KWS Cassia</td>
<td>R</td>
<td>Modest yield, very good sp wt.</td>
</tr>
<tr>
<td>KWS Glacier</td>
<td>R</td>
<td>Good yield and sp wt. Weak for mildew</td>
</tr>
<tr>
<td>KWS Tower</td>
<td>P2</td>
<td>Good yield, acceptable sp wt.</td>
</tr>
<tr>
<td>Cavalier</td>
<td>P2</td>
<td>Good North region yield, v good sp wt.</td>
</tr>
<tr>
<td>KWS Infinity</td>
<td>P1</td>
<td>Good yield, acceptable sp wt. Weak for mildew</td>
</tr>
</tbody>
</table>
## Winter wheat – Distilling

<table>
<thead>
<tr>
<th></th>
<th>Status</th>
<th>Status Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Viscount</td>
<td>R</td>
<td>Good. Benchmark.</td>
</tr>
<tr>
<td>Horatio</td>
<td>R</td>
<td>Medium.</td>
</tr>
<tr>
<td>Beluga</td>
<td>O</td>
<td>Reduced interest</td>
</tr>
<tr>
<td>Alchemy</td>
<td>O</td>
<td>Medium. Less interest. Low yield</td>
</tr>
<tr>
<td>Leeds</td>
<td>R</td>
<td>Medium. High yield. Growing interest. Weak for mildew</td>
</tr>
<tr>
<td>Myriad</td>
<td>R</td>
<td>Medium. Growing interest.</td>
</tr>
<tr>
<td>Twister</td>
<td>P2</td>
<td>Medium. High yield. Weak for mildew</td>
</tr>
</tbody>
</table>
## Winter wheat – Biscuit and Distilling

<table>
<thead>
<tr>
<th>Variety</th>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invicta</td>
<td>R</td>
<td>Medium for distilling. Late maturing.</td>
</tr>
<tr>
<td>Icon</td>
<td>P2</td>
<td>Good for distilling</td>
</tr>
<tr>
<td>Zulu</td>
<td>P2</td>
<td>Medium for distilling</td>
</tr>
<tr>
<td>RGT Conversion</td>
<td>P1</td>
<td>Good for distilling</td>
</tr>
<tr>
<td>Tuxedo</td>
<td>Off</td>
<td>Medium for distilling. No market pull</td>
</tr>
<tr>
<td>Britannia</td>
<td>No</td>
<td>Poor for distilling. Biscuit only</td>
</tr>
</tbody>
</table>
Event close