



European Newsletter

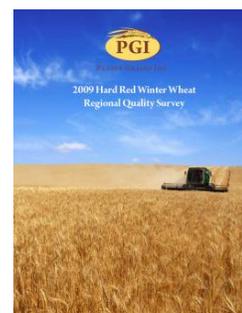
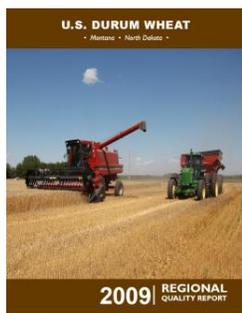
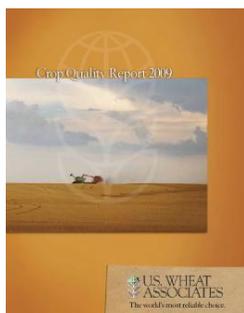
November 2009

U.S. Wheat Associates (USW) develops export markets by demonstrating the reliability, choice and value of U.S. wheat in over 90 countries. For more information, visit www.uswheat.org.

1. Crop Quality Reports of 2009 Now Available

All Crop Quality Reports for the year 2009 have now been posted on our website.

Apart from USW's national 2009 Crop Quality Report summarizing the quality characteristics of all US wheat classes, individual and detailed Crop Quality Reports for each of the six US Wheat classes can now be downloaded from our website: <http://www.uswheat.org/cropQualityReports#2009>. If you like to receive hard copies of one or more of these reports, please send an e-mail including your postal address to InfoRotterdam@uswheat.org.



Hard Red Spring and Durum Report

The Crop Quality Report of Hard Red Spring (HRS) and Durum that have been compiled by the North Dakota Wheat Commission are the latest additions to USW's website. USW uses the information in our annual Crop Quality Seminars conducted across Asia and Europe in November, and with other key customers throughout the year.

The reports detail physical attributes and milling performance, plus dough mixing and bread baking properties for the spring wheat crop and pasta processing traits for the durum crop.

The reports are based on harvest samples collected by the National Agricultural Statistics Service offices in North Dakota, Minnesota, Montana and South Dakota and tested by the North Dakota State University Plant Sciences quality laboratories. The collected spring wheat samples represent 93 percent of the nation's spring wheat production, whereas the durum samples that are collected cover 73 percent of the nation's durum production in 2009.

Quality Summary of Hard Red Spring

This year's spring wheat crop grades a No. 1 Northern Spring, with very low levels of damaged kernels, high test weights and improved thousand kernel weights. Average protein was below average due to a cooler growing season and above average yields. Dough handling of the crop is good, but the overall dough strength is weaker than average. Bake tests produced loaves with excellent bread quality but slightly below average volumes.

While lower average protein will be the main challenge with some customers, buyers will certainly appreciate the larger supply, outstanding test weights and exceptional overall grade quality in the 2009 crop which is still producing high absorptions and good bake quality.



Quality Summary of Durum

The U.S. durum crop grades a No. 1 Hard Amber Durum and has an outstanding average test weight at 80.1 kg/hl, high falling number values and very low levels of damaged kernels. Protein is lower than normal and vitreous kernel counts are the same as last year at 83 percent.

Millers will appreciate that the milling extractions are up 4 to 5 percent from last year with lower ash levels, and the semolina is showing stronger mixing properties, due in part to a switch in planted varieties. Pasta color scores are also up significantly from last year. Buyers will find a lot to appreciate in the larger, higher quality 2009 crop.



2. Final Reminder for Registration for US Wheat's Crop Quality Seminars

This week USW's 2009 Crop Quality Seminars have started. To those who have not signed up yet and would like to participate, please take a few minutes of your time to complete registration.

Topics include milling, baking and other quality characteristics of the new U.S. crop along with the world wheat supply and demand situation. The seminars also allow discussion about U.S. wheat issues and trends.

Bert D'Appolonia, Professor Emeritus at North Dakota State University, and Goris van Lit, USW's Regional Director Europe, will be presenters of the seminar. The seminar will take about two to three hours and will be followed by an informal luncheon / reception function.

The final schedule of the 2009 Crop Quality Seminars is summarized in the table below.

City	Date	Starting Time	Venue & Street Address
Milan	Nov. 10, Tuesday	11:00 AM	Associazione Granaria di Milano Sede Borsa dei Cereali di Milano, Milanofiori, Strada 6, Palazzo G/1, Rozanno, Milan
Warsaw	Nov. 12, Thursday	10:00 AM	Institute of Agricultural and Food Biotechnology Department of Grain Processing and Bakery, Str. Rakowiecka 36, Hall "A" (first floor), Warsaw
Oslo	Nov. 13, Friday	10:00 AM	Hotel Scandic KNA "Skillebekk", Parkveien 68, Solli, Oslo
Antwerp	Nov. 16, Monday	10:00 AM	IMEXGRA VZW Lange Nieuwstraat 17, Antwerpen
Barcelona	Nov. 17, Tuesday	10:30 AM	Llotja de Cereals de Barcelona "Salon Leones", Casa Llotja de Mar, Passeo de Isabel II / 1, Barcelona
Madrid	Nov. 18, Wednesday	10:00 AM	Hotel Miguel Ángel "Medici III", 31 Miguel Angel St., Madrid
Porto	Nov. 20, Friday	10:00 AM	HF Ipanema Porto Hotel "FOZ", Rua do Campo Alegre 156, Porto
London	Nov. 23, Monday	10:00 AM	Radisson SAS Hotel "Room Devonshare", 22 Portman Square, London
Naples	Nov. 24, Tuesday	11:00 AM	Unione degli Industriali di Napoli, Piazza dei Martiri 58, Naples

Please note that the venue of the Naples seminar has changed. The seminar will now be held at Unione degli Industriali di Napoli, Piazza dei Martiri 58 in Naples.

You can sign up by sending an e-mail to InfoRotterdam@uswheat.org. Please include the following details in your e-mail: (1) the seminar city of your choice, (2) company name, and (3) participant name(s). Or contact the US Wheat Associates office in Rotterdam by either phone +31 10 413 9155 or fax +31 10 433 0438.

We hope to meet you soon at one of the seminars.

3. Wheat Industry News

- **How Wheat Works.** At the end of October, The Wheat Foods Council (www.wheatfoods.org) launched an interactive, online multimedia program that aims to educate users about the wheat growing process and wheat products' nutritional value. Available at www.howwheatworks.com, participants will have the opportunity to grow and harvest their own wheat field, mill the golden grain and create their wheat food of choice. This exciting, interactive program is filled with factual information, vibrant video and 3-D animation, and educational activities. Each of the program's four phases – growth, harvest, milling/baking and the grocer's aisle - takes just a few minutes to complete, while the program spans the course of four days. A quiz tests the participant's wheat knowledge at program end, at which time the Council donates two pounds of flour, up to 90,000 pounds, to Operation Homefront, a non-profit organization that provides assistance to needy U.S. troops and their families.



- **Wheat Quality Improvement Team.** During January 2010 a Wheat Quality Improvement Team (WQI) of U.S. wheat breeders and quality specialists will travel to various European countries to meet wheat buyers and technical managers. This was announced by the USW Wheat Quality Committee during a USW board meeting that has recently been held. The WQI Team will gather input on wheat quality from key customers, such as what they specifically like and dislike about each market class. Then this information will be shared with U.S. wheat research and extension education communities to keep the long-term process of constant quality improvement moving forward – and to continue raising the already excellent value of U.S. wheat.
- **Delayed Winter Wheat Plantings.** A combination of late soybean harvest and continued wet conditions have some producers concerned about getting their intended winter wheat acreage planted. According to the USDA, about 76 percent of the winter wheat crop had been planted as of Oct. 25, behind the average of 85 percent. In Illinois, a key producer of Soft Red Winter (SRW) wheat, seeding was only 33 percent complete compared to the average of 82 percent. Areas of the Hard Red Winter (HRW) wheat region are also struggling to get in the remainder of their crop. The Kansas Wheat Commission says it appears wheat acres will be less than originally intended due to abnormally wet planting conditions and delayed harvests. The window for winter wheat planting is closing quickly and farmgate wheat prices remain relatively low. Without warmer, drier weather soon, a significant reduction in planted winter wheat acres seems likely.

