
# Austrian Soft Wheat from the Crop 2025

## Preface

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*Ladies and Gentlemen,*
*Dear Customers and Friends of Austrian Wheat,*

*the globally weak economy, growing concerns about the negative impact of U.S. import tariffs on world trade as well as the depreciation of the US Dollar against the Euro, which has gained momentum since the beginning of the year, have also left their mark on the grain market.*
*As a result, prices have been under pressure for months, and consumption continues to be characterized by great restraint.*
*A quantitatively and qualitatively good harvest is becoming apparent in the northern hemisphere, so that there is currently little room for speculation about further market developments.*
*In Austria, despite very unsettled weather conditions, the harvest in most parts of the country was largely completed by the end of July.*
*The Austrian wheat harvest of 2025 has turned out to be very good, both in terms of quantity and quality.*
*The share of Quality and Premium Wheat this year, at around 70%, is significantly higher than in the previous two years.*
*Even though competition is particularly strong this year due to the large supply from North America, the impeccable quality of Austrian wheat from the 2025 harvest should again open good marketing opportunities at home and abroad over the course of the season.*
*It should also be noted that Austrian wheat not only fully complies with the very strict food regulations of the EU, but has extremely low levels of fusarium toxins, heavy metals, pesticide residues, and other contaminants!*
*With the introduction of the AMA bakery seal the goal was achieved of documenting, within the framework of a national quality assurance system, that wheat production in Austria takes place within the framework of environmentally friendly and sustainable agriculture.*

*Since food safety and environmentally friendly production are certainly not just empty slogans for our customers, we can be confident, despite a difficult starting point, that Austrian wheat will once again remain a fixed component on the shopping lists of the European milling industry in this marketing season.*

The 2025 wheat harvest in Austria will amount to 1,530,000 tons: 6.8% above the modest level of the previous year. This year's harvest volume can therefore be rated as slightly above average (+0.7% compared to the long-term mean). There are two reasons for the production increase. First, the cultivated area was expanded: in 2025, soft wheat was able to compensate in part for the acreage decline of the previous year (-9,130 ha) with an increase of 3,476 ha. In addition, a higher yield per hectare of 6 t/ha (+3 %) was achieved.

The arable year began with a dry and mild October, providing a favourable window for timely wheat sowing. The mild winter caused no significant winterkill damage to the stands. From the start of vegetation in March, regular rainfall promoted further crop development, in particular through good tillering with numerous side shoots. As a result, this year saw a high number of ears per square metre – the decisive basis for yield. In April and May, the cereal stands were able to develop large ears during the shooting phase, as predominantly cool and moderate temperatures prevailed, and hot days were largely absent. At the end of the grain filling phase in June, wheat was hit by a heatwave. This still allowed for good yields, although a new yield record could not be achieved. Wet harvest conditions from mid-July significantly delayed harvest progress. Nevertheless, the quality of this year's wheat harvest is outstanding.

The traditional Austrian quality wheat region covers the central and eastern parts of the province of Lower Austria and the northern and central parts of the province of Burgenland. In climate terms this region is called the continental Pannonian climate zone (Figure 1). As a result of long-term observations, we know that this climate zone is the best region for the production of high-quality wheat, a fact which has come to be known all over Europe. Although the yields are not as high as in the western parts of Lower Austria and in Upper Austria due to the lack of rainfall, the climate is highly favourable to the development of very good baking qualities.
Moreover, this region profits from the deep and rich humus soil that also has an influence on the wheat quality.
In the milling wheat region (western Lower Austria and Upper Austria) the quality parameters are inferior, but they usually produce a good milling quality (Figure 1).
The essential parameters for the baking quality of wheat are protein quantity, protein quality and the gelatinization of the starch. The protein quantity is determined by the variety as well as by weather conditions, soil, fertilization, and climate. The protein quality on the other hand is mainly a genetic characteristic and thus a variety feature. Gelatinization of the starch depends essentially on the weather conditions before harvest.

# Wheat Varieties

The Austrian wheat varieties are graded into 9 quality categories, category 1 representing the lowest and category 9 the highest baking quality. In the Pannonian climate zone in eastern Austria the quality wheat varieties are dominant, which are classed into the baking quality categories 7 to 9. The leading quality wheat varieties are "Axaro", "Aurelius", "Christoph", "Capo" and "Arnold." Among the milling wheat varieties, which are classed into the baking quality categories 3 to 6, the varieties "Chevignon", "Tiberius", "RGT Reform", "Spontan" and "Ernestos" are significant.

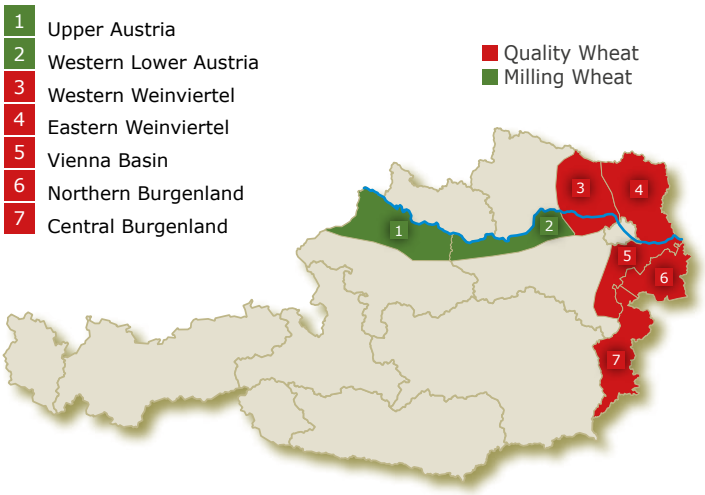
# Yields

Table 1 lists crop areas, average yields, and total production as well as available quantities. For the crop 2025 the figures for market availability are estimates.

## Production und available quantities of Quality and Milling Wheat per crop year

The wheat acreage, after last year's decline, was expanded again this year and amounts to 241,770 ha. According to the graphic in Table 1, the areas in eastern Austria total 140,506 ha, an increase of around 4,000 ha compared to the previous year. The cultivation areas in western Lower Austria and Upper Austria amount to 70,389 ha and remained stable compared to the previous year. The average yield for soft wheat across the entire survey region will be 63.6 dt/ha. This results in a total production of quality and milling wheat of around 1,341,000 t in these regions. Marketable volumes can only be estimated. From the 2025 harvest, around 1,274,000 t of wheat will be available from these regions, with around 63% of the marketable supply located in the Pannonian region.

Figure 1
Quality wheat and milling wheat regions




# Quality Criteria

The quality data listed in the table below are based on a crop survey made by "Agrarmarkt Austria" and the "Versuchsanstalt für Getreideverarbeitung" (Institute for Cereal Processing) in Vienna which drew samples at the various wholesale buyers and analysed them. The recorded date of the quality data for 2025 as well as of the comparative data from 2024 is August 19th, thus the results are provisional ones.

The average hectolitre weight in the quality wheat region, at 81.4 kg, is in the very good range. In Upper Austria and western Lower Austria, the hectolitre weight is also very good at 81.2 kg. Thus, the milling quality of the new crop can be rated as excellent. Details of the hectolitre weights in individual regions can be found in Tables 2a and 2b.

## Quality Parameters of Quality and Milling Wheat Crop 2025 in comparison to last year

Figure 3 displays averages of this year's quality and milling wheat crop. The protein content, at 14.7% in the quality wheat area, is excellent. The gluten content corresponds accordingly, at 32.2%, which is good, although the protein-to-gluten ratio is somewhat lower. In the milling wheat region, an average protein content of 13.5% was measured, which is above the minimum requirement for milling wheat at the Exchange for Agricultural Products (12.5%). The protein-to-gluten ratio is in the lower range, resulting in an average wet gluten content of 28.4%.

## Quality Survey 2025 – Protein Contents and Falling Numbers of Quality Wheat

Tables 3a and 3b list the protein contents and the falling numbers of the Pannonian climate regions and the milling wheat regions. The protein levels in the quality wheat area and falling numbers in all areas are very good.

## Quality Survey 2025 – Farinogram and Alveogram in the Quality Wheat Area

Table 4 lists the behaviour of wheat in processing. The Farinogram characterizes the consistency of the dough. The average dough development of 5.2 minutes is excellent. Dough stability at 26 minutes demonstrates outstanding tolerance to kneading.
For the Alveogram the W-value in the quality wheat area with an average result of 328 units is very good.
The ratio of P/L of 0.6 is ideal.

## Farinogram and Alveogram of the crop 2025 in the survey areas of Quality Wheat and Milling Wheat

The behaviour of wheat of the various Pannonian areas is listed in table 5a and of the milling wheat areas in table 5b.
The Farinogram stability and the W-values as per Alveogram are very good in the quality wheat area. Farinogram and Alveogram values of milling wheat are good.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# Mycotoxin Contamination

The problem of the mycotoxin DON (Deoxynivalenol) caused by Fusarium has been studied in Austria for many years (examination of the influencing factors in field tests, evaluation of head blight in variety classification tests, etc.). In particular, the large-scale field monitoring conducted by the Chambers of Agriculture and the samples analysed give on the one hand an excellent survey of the contamination in the various regions, and on the other hand they make it possible to develop adequate agricultural strategies for the reduction of infection risk. From this viewpoint the Austrian wheat producers have been well prepared to respond to the introduction of the maximum mycotoxin level of wheat applicable at present (DON 1000 µg/kg).
The contamination of this year's crop in the quality and milling wheat areas is classified as very low and remains well below the limit.

# Contamination with heavy metals and pesticide residues

Besides the contamination with mycotoxins, we would also like to point to the lack of contamination of Austrian cereals production and milling products with heavy metals. The "Versuchsanstalt für Getreideverarbeitung" (Institute for Cereal Processing) found no contamination with lead, cadmium, or mercury in qualitative analysis of any cereal or cereal product from the Austrian Federal Area between 2015 and 2025.
In Austria, no residue of Glyphosate was found in wheat, rye, and milling products according to the European Cereals Monitoring Programme, whereas in the whole European monitoring area 8% of samples analysed were found to be contaminated with Glyphosate.

## Summary


**This year's wheat harvest is larger than last year's and contains a higher proportion of quality and premium wheat. The specific gluten quality, expressed by the structural swelling number ("Strukturquellzahl"), is in the very good range.**
**The 2025 quality wheat harvest can be rated as very good in terms of baking quality within the quality wheat region of the Pannonian area.**
**The hectolitre weight lies in the excellent range, therefore outstanding milling properties can be expected. Protein values are very good and somewhat better than last year, whereas gluten values are slightly lower in proportion. Falling numbers are consistently in the very high range, which indicates high gelatinization properties.**
**The farinograph and alveograph results show balanced rheological properties, for which reason very good processing conditions can be expected.**
**The values in the milling wheat region are, as expected, lower than in the quality wheat region, but they are still in the good range.**
**Mycotoxin contamination (DON) is well below the maximum limit throughout the entire wheat-growing area.**


Figure 2
Quality of Quality and Milling Wheat Crop 2025 in comparison to the previous year

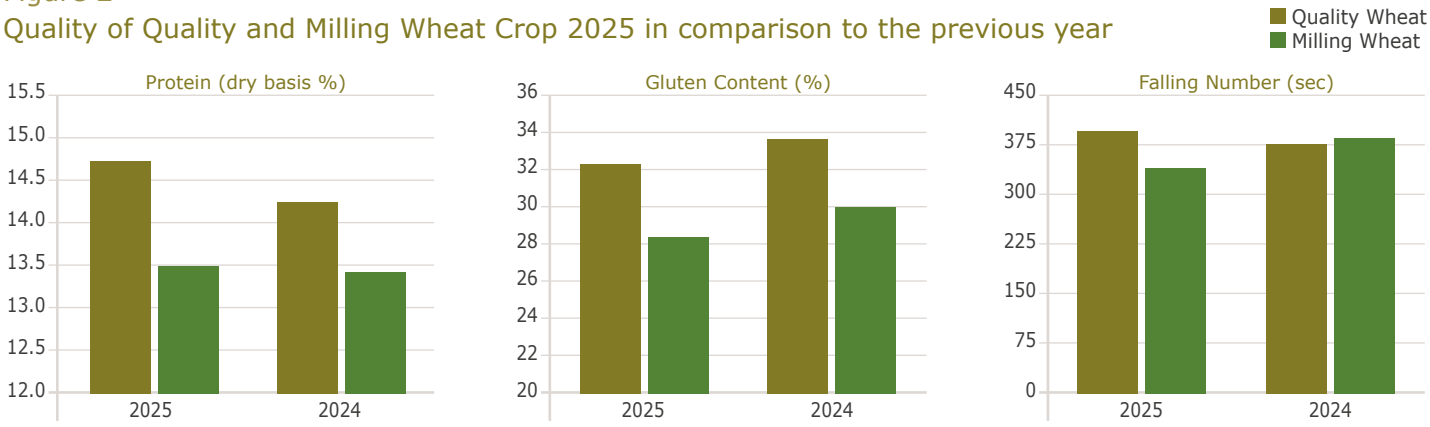


Table 1
Production und available quantities of quality and milling wheat per marketing year

| Survey Area | 2025/26 Estimate | | | | 2024/25 Final | | | | 2023/24 Final | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Area in ha | Yield in dt | Production in t | Availability in t | Area in ha | Yield in dt | Produktion in t | Availability in t | Area in ha | Yield in dt | Production in t | Availability in t |
| **Northern Burgenland** | 15,534 | 47.6 | 73,890 | **70,196** | 14,009 | 38.5 | 53,949 | **51,252** | 15,293 | 51.6 | 78,841 | **74,899** |
| **Middle Burgenland** | 10,270 | 53.8 | 55,220 | **52,459** | 8,991 | 51.0 | 45,861 | **43,568** | 9,998 | 54.6 | 54,621 | **51,890** |
| **Vienna Basin** | 18,418 | 54.1 | 99,642 | **94,659** | 18,196 | 50.7 | 92,175 | **87,566** | 18,708 | 58.5 | 109,400 | **103,930** |
| **Eastern Weinviertel** | 41.,610 | 55.8 | 232,295 | **220,680** | 40,890 | 53.1 | 217,058 | **206,205** | 43,810 | 58.4 | 255,870 | **243,076** |
| **Western Weinviertel** | 54,674 | 69.2 | 378,491 | **359,566** | 54,130 | 62.9 | 340,377 | **323,358** | 55,162 | 63.0 | 347,765 | **330,376** |
| | **140,506** | **59.8** | **839,537** | **797,560** | **136,215** | **55.0** | **749,420** | **711,949** | **142,971** | **59.2** | **846,496** | **804,171** |
| **Western Lower Austria** | 22,068 | 63.2 | 139,526 | **132,549** | 22,077 | 65.5 | 144,526 | **137,300** | 22,289 | 57.8 | 128,859 | **122,416** |
| **Upper Austria** | 48,321 | 75.0 | 362,408 | **344,287** | 49,406 | 70.8 | 349,795 | **332,305** | 51,221 | 75.2 | 385,182 | **365,923** |
| | **70,389** | **71.3** | **501,933** | **476,836** | **71,483** | **69.2** | **494,321** | **469,605** | **73,510** | **69.9** | **514,041** | **488,339** |
| **Total** | **210,895** | **63.6** | **1,341,470** | **1,274,397** | **207,698** | **59.9** | **1,243,741** | **1,181,554** | **216,481** | **62.8** | **1,360,537** | **1,292,510** |

* Remarks on the area: The following areas for organic farming are included:
**2025/2026:** 42,737 ha • **2024/2025**: 41,249 ha • **2023/2024:** 43,592 ha • **2022/2023:** 41,658 ha • **2021/2022** 40,658 ha • **2020/2021:** 40,280 ha

# Quality Survey 2025

## Table 2a
### Hectolitre Weight of Quality Wheat
Average Hectolitre Weight

| Survey Area | 2025 | 2024 | 2023 |
|---|---|---|---|
| Northern Burgenland | 82.0 | 80.1 | 82.2 |
| Central Burgenland | 81.6 | 80.9 | 79.8 |
| Vienna Basin | 82.2 | 82.4 | 82.9 |
| Eastern Weinviertel | 80.3 | 81.4 | 82.8 |
| Western Weinviertel | 80.9 | 82.5 | 83.0 |
| **Average** | **81.4** | **81.4** | **82.1** |

## Table 2b
### Hectolitre Weight of Milling Wheat
Average Hectolitre Weight

| Survey Area | 2025 | 2024 | 2023 |
|---|---|---|---|
| Western Lower Austria | 81.7 | 82.1 | 83.3 |
| Upper Austria | 80.6 | 78.2 | 80.8 |
| **Average** | **81.2** | **80.2** | **82.1** |

## Table 3a
### Protein Contents and Falling Numbers of Quality Wheat
Average Protein in dry matter %

| Survey Area | 2025 | 2024 | 2023 |
|---|---|---|---|
| Northern Burgenland | 15.1 | 14.4 | 14.0 |
| Central Burgenland | 14.7 | 14.4 | 14.8 |
| Vienna Basin | 14.8 | 14.1 | 14.3 |
| Eastern Weinviertel | 14.3 | 14.2 | 14.1 |
| Western Weinviertel | 14.6 | 14.2 | 14.4 |
| **Average** | **14.7** | **14.2** | **14.3** |

Average Falling Number in sec.

| Survey Area | 2025 | 2024 | 2023 |
|---|---|---|---|
| Northern Burgenland | 414 | 355 | 376 |
| Central Burgenland | 391 | 338 | 378 |
| Vienna Basin | 392 | 363 | 389 |
| Eastern Weinviertel | 391 | 397 | 376 |
| Western Weinviertel | 384 | 375 | 364 |
| **Average** | **395** | **366** | **376** |

## Table 3b
### Protein Contents and Falling Numbers for Milling Wheat
Average Protein in dry matter %

| Survey Area | 2025 | 2024 | 2023 |
|---|---|---|---|
| Western Lower Austria | 14.7 | 14.4 | 14.8 |
| Upper Austria | 12.4 | 12.4 | 11.0 |
| **Average** | **13.5** | **13.4** | **12.9** |

Average Falling Number in sec.

| Survey Area | 2025 | 2024 | 2023 |
|---|---|---|---|
| Western Lower Austria | 350 | 385 | 379 |
| Upper Austria | 324 | 356 | 375 |
| **Average** | **337** | **370** | **377** |

## Table 4
### Average Farinogram Results
Quality wheat area

| | 2025 | 2024 | 2023 |
|---|---|---|---|
| Stability | 26.0 | 24.1 | 21.7 |

### Average Alveogram Results
Quality wheat area

| | 2025 | 2024 | 2023 |
|---|---|---|---|
| W (Total Energy) | 328 | 315 | 305 |
| P/L = Resistance/Extensibility | 0.6 | 0.5 | 0.5 |

## Table 5a
### Farinogram und Alveogram of the crop 2025 in the survey areas of quality wheat

| Survey Area | Stability | W (Total Energy) | P/L, Resistance/ Extensibility |
|---|---|---|---|
| Northern Burgenland | 24.9 | 360 | 0.6 |
| Central Burgenland | 25.7 | 326 | 0.6 |
| Vienna Basin | 26.9 | 337 | 0.7 |
| Eastern Weinviertel | 25.0 | 290 | 0.6 |
| Western Weinviertel | 27.3 | 329 | 0.6 |
| **Average** | **26.0** | **328** | **0.6** |

## Table 5b
### Farinogram and Alveogram of the crop 2025 in the survey areas of milling wheat

| Survey Area | Stability | W (Total Energy) | P/L, Resistance/ Extensibility |
|---|---|---|---|
| Western Lower Austria | 28.2 | 327 | 0.6 |
| Upper Austria | 6.9 | 228 | 0.5 |
| **Average** | **17.6** | **278** | **0.6** |