Austrian Soft Wheat from the Crop 2026

Preface

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

The grain market is facing unusual challenges this year. Beyond the weather-related yield reductions, the continuing extremely difficult geopolitical environment is shaping the markets and complicating the view on further developments. Thus, the grain market moves in a field of tension between smaller harvest quantities, uncertain international trade flows and demand that remains subdued.
The intensification of hostilities in the Black Sea area suggests that the monthly quantities expected to be exported out of this region, important for the world cereals market, will be significantly reduced. At the same time, an opening of the Strait of Hormuz is still not foreseeable. Due to this, the development of the oil prices is very difficult to predict. The associated uncertainty has a direct impact on agricultural production costs and in particular on fertiliser price development.
On the demand side the situation remains challenging. The processors are continuing to struggle with a weak economy and have only limited possibilities to pass on increased costs through higher selling prices.
At the same time the domestic cereals crop 2026 will be below average due to the drought and the heat, as in most countries in Europe.
The situation is even more dramatic for the autumn harvest and especially for maize. Due to this, the availability of feed grain takes on a special significance.
The Austrian wheat crop 2026 has turned out well in terms of quality and displays predominantly excellent gluten qualities.
Due to the dry weather the disease pressure was very low, for which reason there is no noteworthy mycotoxin contamination again this year.
With the AMA Bakery Seal the opportunity was additionally created to guarantee to domestic and foreign customers sustainable and resource-conserving wheat production within the framework of a national quality assurance system
For this reason, the outlook for successful marketing of the Austrian wheat crop 2026 is positive.
Because price development is very difficult to predict due to the geopolitical situation, we must however prepare again this year for an eventful marketing campaign!

The 2026 wheat harvest in Austria will amount to 1,240,000 tons: 22.4% below the previous year. The main reason for this reduction in production is, apart from the acreage reduction, the weather.
The planted area was reduced by 4,948 ha, on top of this the missing precipitation and the higher temperatures put a strain on field crops.

The development of cereal cultures began with a dry autumn, which on the one hand enabled planned acreage to be planted but led to reduced tillering (side shoots). From the start of vegetation in March badly needed precipitation was missing, for which reason the stands this year formed a noticeably smaller number of ears per square metre – the crucial foundation for the yield.
The dry months of April and May led during the shooting phase to a reduced number of grains per ear. In the grain filling phase in June some hot days were recorded but moderate precipitation prevented a sharper decline in yield. The cereal stands had already reacted to the dry weather by reducing the sources of yield (ears per square metre and kernels per ear). Wheat was still hit by the heatwave, due to its slower development in the grain filling phase. Although the yields per hectare lie noticeably below last year's good result and the average of previous years, harvested quality is in many areas of a high standard. The wide variation in yields can be explained by the different soil quality: the reduction in yield due to the dry weather was less on good soils with better water-holding capacity than on soils with low soil quality.

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 quality wheat varieties are dominant, which are classed into the baking quality categories 7 to 9. The leading quality wheat varieties are "Axaro", "Aurelius", "Bernstein", "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 "Ernestus" are significant.

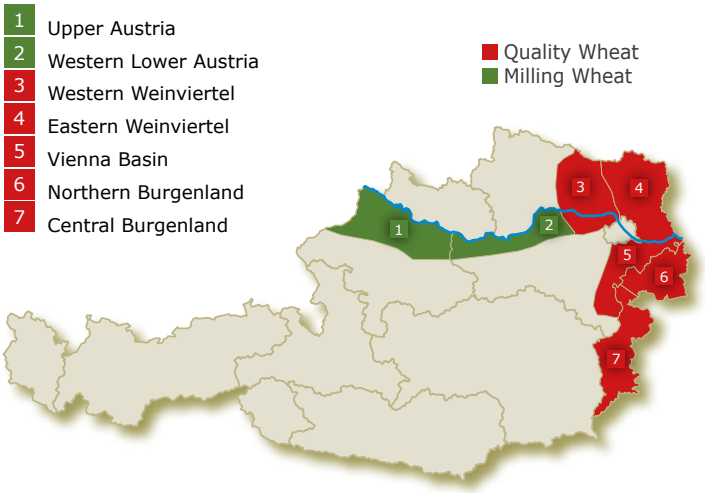
Yields

Table 1 lists crop areas, average yields, and total production as well as available quantities. For the crop 2026 the figures for market availability are estimates.

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

The soft wheat acreage declined against last year by 4,948 ha. Despite this reduction soft wheat remains with 236,822 ha the main crop on Austria´s fields.
According to the graphic in Table 1, the areas in eastern Austria total 136,803 ha, a reduction of around 3,700 ha compared to the previous year. The cultivation areas in western Lower Austria and Upper Austria amount to 68,466 ha: a slight reduction against last year. The average yield for soft wheat across the entire survey region will be 50,4 dt/ha. This results in a total production of quality and milling wheat of around 1,152,952 t in these regions. Marketable volumes can only be estimated. From the 2026 harvest, around 1,095,304 t of wheat will be available from these regions, with around 52% 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 representative samples at the various wholesale buyers and analysed them.

The average hectolitre weight in the quality wheat region, at 84.2 kg, is in the excellent range. In Upper Austria and western Lower Austria, the hectolitre weight is also very good at 82.7 kg. Thus, the milling quality of the new crop can be rated as very good. Details of the hectolitre weights in individual regions can be found in Tables 2a and 2b.

Quality Parameters of Quality and Milling Wheat Crop 2026 in comparison to last year

Figure 3 displays averages of this year's quality and milling wheat crop. The protein content, at 15.1% in the quality wheat area, is excellent. The gluten content corresponds accordingly, at 35.8%, which is excellent. In the milling wheat region, an average protein content of 14.0% 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 also high, resulting in an average wet gluten content of 33.7%.

Quality Survey 2026 – Protein Contents and Falling Numbers of Quality Wheat

Tables 3a and 3b list the protein content 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 2026 – Farinogram and Alveogram in the Quality Wheat Area

Table 4 shows the behaviour of wheat in processing. The Farinogram characterizes the consistency of the dough. The average dough development of 7.9 minutes is very good. Dough stability at 16.8 minutes demonstrates outstanding tolerance to kneading.
For the Alveogram the W-value in the quality wheat area with an average result of 355 units is excellent.
The ratio of P/L of 0.68 is ideal.

Farinogram and Alveogram of the crop 2026 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 at on average 90 µg/kg is classified as extremely low: its lowest level in years.

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 2026.
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 significantly smaller than last year's and contains a much higher proportion of quality and premium wheat. The quality wheat harvest of 2026 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, so that outstanding milling properties can be expected. Protein values are very good and again better than last year, also gluten values are much better than last year's.
Falling numbers are in the very high range, which indicates high gelatinization properties.
The farinogram and alveogram results show balanced rheological properties, for which reason excellent 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 very good range.
Mycotoxin contamination (DON) is extremely low and significantly below the maximum permitted limit throughout the entire wheat-growing area.

Figure 2
Quality of Quality and Milling Wheat Crop 2026 in comparison to the previous year

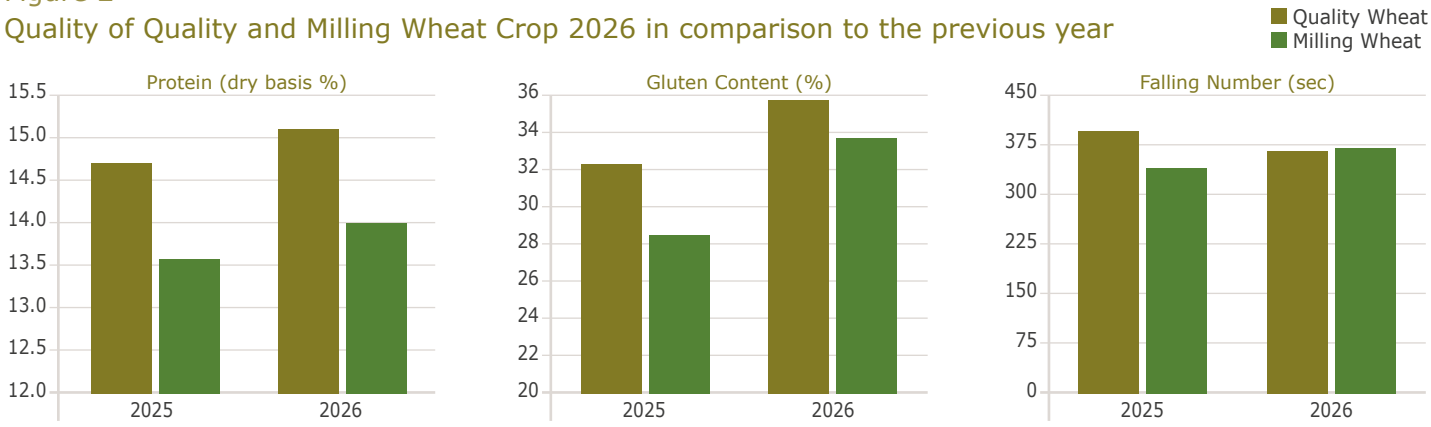

Table 1
Production and available quantities of Quality and Milling Wheat per marketing year

Survey Area	2026/27 Estimate				2025/26 Final				2024/25 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	15,615	36.6	57,178	**54,319**	15,534	38.9	60,373	**57,354**	14,009	38.5	53,949	**51,252**
Middle Burgenland	9,243	41.3	38,134	**36,227**	10,270	56.3	57,825	**54,934**	8,991	51.0	45,861	**43,568**
Vienna Basin	18,267	41.8	76,320	**72,504**	18,418	54.8	100,956	**95,908**	18,196	50.7	92,175	**87,566**
Eastern Weinviertel	39,886	38.7	154,262	**146,549**	41,610	50.9	211,956	**201,358**	40,890	53.1	217,058	**206,205**
Western Weinviertel	53,792	44.7	240,466	**228,442**	54,674	63.5	346,926	**329,580**	54,130	62.9	340,377	**323,358**
	136,803	**41.4**	**566,359**	**538,041**	**140,506**	**55.4**	**778,036**	**739,134**	**136,215**	**55.0**	**749,420**	**711,949**
Western Lower Austria	21,087	67.2	141,759	**134,671**	22,068	70.6	155,890	**148,096**	22,077	65.5	144,526	**137,300**
Upper Austria	47,379	69.0	326,915	**310,569**	48,321	79.3	383,186	**364,026**	49,406	70.8	349,795	**332,305**
	68,466	**68.5**	**468,674**	**445,241**	**70,389**	**76.6**	**539,076**	**512,122**	**71,483**	**69.2**	**494,321**	**469,605**
Total	**205,269**	**50.4**	**1,035,034**	**983,282**	**210,895**	**62.5**	**1,317,112**	**1,251,256**	**207,698**	**59.9**	**1,243,741**	**1,181,554**

* Remarks on the area: The following areas for organic farming are included: **2026/2027:** 41,100 ha • **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 2026

Table 2a
Hectolitre Weight of Quality Wheat
Average Hectolitre Weight

Survey Area	2026	2025	2024
Northern Burgenland	83.0	82.0	80.1
Central Burgenland	85.7	81.6	80.9
Vienna Basin	84.5	82.2	82.4
Eastern Weinviertel	83.4	80.3	81.4
Western Weinviertel	84.6	80.9	82.5
Average	**84.2**	**81.4**	**81.4**

Table 2b
Hectolitre Weight of Milling Wheat
Average Hectolitre Weight

Survey Area	2026	2025	2024
Western Lower Austria	83.2	81.7	82.1
Upper Austria	82.3	80.6	78.2
Average	**82.7**	**81.2**	**80.2**

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

Survey Area	2026	2025	2024
Northern Burgenland	15.5	15.1	14.4
Central Burgenland	14.5	14.7	14.4
Vienna Basin	15.2	14.8	14.1
Eastern Weinviertel	15.0	14.3	14.2
Western Weinviertel	15.1	14.6	14.2
Average	**15.1**	**14.7**	**14.2**

Average Falling Number in sec.

Survey Area	2025	2024	2023
Northern Burgenland	371	414	355
Central Burgenland	360	391	338
Vienna Basin	372	392	363
Eastern Weinviertel	376	391	397
Western Weinviertel	361	384	375
Average	**368**	**395**	**366**

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

Survey Area	2026	2025	2024
Western Lower Austria	15.2	14.7	14.4
Upper Austria	12.8	12.4	12.4
Average	**14.0**	**13.5**	**13.4**

Average Falling Number in sec.

Survey Area	2026	2025	2024
Western Lower Austria	370	350	385
Upper Austria	378	324	356
Average	**374**	**337**	**370**

Table 4
Average Farinogram Results
Quality Wheat area

	2026	2025	2024
Stability	21.2	26.0	24.1

Average Alveogram Results
Quality Wheat area

	2026	2025	2024
W (Total Energy)	355	328	315
P/L = Resistance/Extensibility	0.68	0.6	0.5

Table 5a
Farinogram and Alveogram of the crop 2026 in the survey areas of Quality Wheat

Survey Area	Stability	W (Total Energy)	P/L, Resistance/ Extensibility
Northern Burgenland	20.2	347	0.73
Central Burgenland	23.9	365	0.73
Vienna Basin	17.7	352	0.60
Eastern Weinviertel	21.0	336	0.65
Western Weinviertel	23.4	375	0.70
Average	**21.2**	**355**	**0.68**

Table 5b
Farinogram and Alveogram of the crop 2026 in the survey areas of Milling Wheat

Survey Area	Stability	W (Total Energy)	P/L, Resistance/ Extensibility
Western Lower Austria	16.8	329	0.54
Upper Austria	9.2	186	0.56
Average	**13.0**	**257**	**0.55**