GRAIN CHRONICLE

Monthly

Newsletter

Monday 2nd June, 2025

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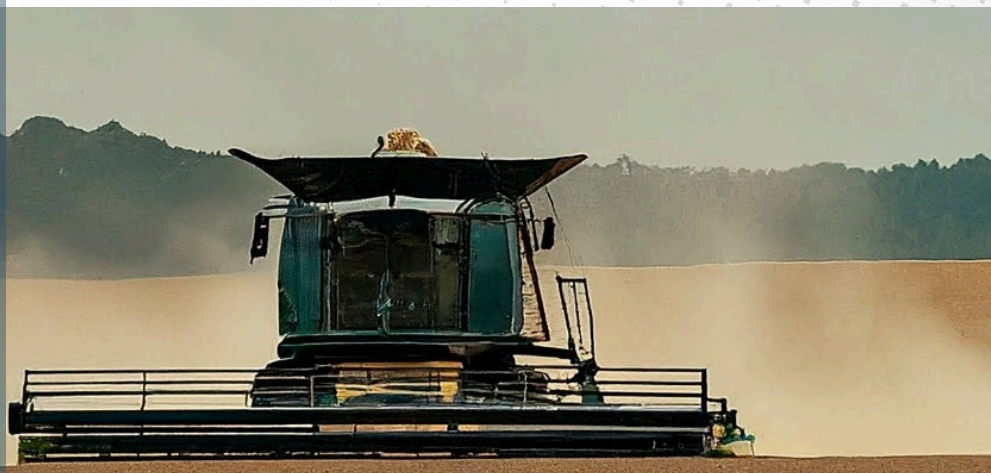

WELCOME TO THE FIRST ISSUE OF GRAIN CHRONICLE!

Dear Reader,

We're happy to welcome you to the inaugural edition of Grain Chronicle newsletter, your new source for news, insights, and developments from across the grain, milling, and feed industries.

Our goal is to inform, connect, and inspire professionals like you—whether you're in production, equipment manufacturing, trade, or research.

Thank you for joining us at the beginning of this journey. We look forward to growing together with you—issue by issue, grain by grain.

Warm regards,

The Grain Chronicle Team

TOP NEWS

Bühler unveils OptiBake: A game-changer in sustainable wafer production

Global technology leader Bühler Group has introduced a revolutionary advancement in industrial baking with the launch of OptiBake.

NEWS

BÜHLER UNVEILS OPTIBAKE: A GAME-CHANGER IN SUSTAINABLE WAFER PRODUCTION

TOP NEWS

Global technology leader Bühler Group has introduced a revolutionary advancement in industrial baking with the launch of OptiBake, the world's first inductively heated wafer oven. This innovation marks a milestone in wafer production by significantly reducing energy consumption, enhancing product quality, and supporting a more sustainable and flexible manufacturing process.

OptiBake stands apart from conventional gas-fired or electric wafer ovens through its innovative use of electric induction heating technology. The system uses electromagnetic fields to generate heat directly in the baking plates, eliminating the need for combustion and significantly cutting emissions. This breakthrough allows up to 50% energy savings, with no direct emissions of CO_2, CO, or NOx. The system not only supports environmental sustainability but also helps manufacturers benefit from reduced energy costs, carbon taxes, and potentially increased subsidies.

"As we developed OptiBake, our mission was to go beyond conventional improvements," said Sandra Lutz, Head of Business Unit Wafer at Bühler Group. "We aimed to achieve unmatched wafer quality and operational flexibility while providing a tool for our customers to make meaningful contributions to sustainability."

The environmental impact of the OptiBake oven can be further minimized when operated using low-carbon energy sources, making it an ideal fit for companies working toward decarbonization and energy security. The elimination of natural gas dependency is another step towards resilient and future-ready production lines.

Industry Recognition and Pilot Partnership

Bühler's innovation has already received industry recognition, winning the Lower Austrian Innovation Award 2025. Out of 80 submissions and nearly 30 finalists, OptiBake claimed the prestigious Karl Ritter von Ghega Prize, awarded for pioneering industrial innovation. "This award underlines the strength of our innovation and the

collaboration behind it," said Sandra Lutz, emphasizing the teamwork and partnerships that fueled the development.

One such key partner is Loacker, the iconic South Tyrolean confectionery brand known for its premium wafers and chocolate products. Since 2020, Loacker has collaborated with Bühler to pioneer zero-emission wafer production.

"This project aligns perfectly with our family company's long-term sustainability goals," said Andreas Loacker, Vice Chairman of the Board. Markus Valersi, Project Manager Engineering at Loacker, added:

"OptiBake supports our transition toward zero-emission baking while maintaining our high product standards. It's a vital step in reducing our environmental footprint."

Shaping the Future at the Wafer Innovation Center

Bühler's Wafer Innovation Center in Leobendorf, Austria, continues to be a hub for development and collaboration. As the global leader in industrial wafer production systems, Bühler offers tailored solutions for a diverse range of products, including flat and hollow wafers, wafer snacks, ice cream cones, and more.

At the center, customers can test solutions with Bühler's experts, refine recipes, and explore energy-efficient technologies like OptiBake. Combined with Bühler's comprehensive global service in sales, maintenance, and spare parts, the center plays a crucial role in driving progress and excellence in wafer production.

RUSSIA SETS NEW GRAIN EXPORT DUTIES EFFECTIVE MAY 28, 2025

The Russian Ministry of Agriculture has announced updated export duty rates for key grain commodities, effective from May 28, 2025. The new rates reflect ongoing efforts to balance domestic market stability with international trade competitiveness.

According to the Ministry, the export duty on wheat will be set at 17.16 USD per metric ton, calculated based on an indicative price of 248.4 USD per metric ton. Meanwhile, barley exports will remain exempt from any duty, with the indicative price established at 204 USD per metric ton.

The export duty on corn has been set at 7.62 USD per metric ton, based on an indicative price of 220.9 USD per metric ton, the Ministry confirmed.

The duty rates are calculated weekly using a formula that considers global market trends and average export prices, in line with Russia's grain export regulation mechanism introduced to

stabilize the domestic grain market and curb inflationary pressures.

These adjustments come as part of the government's broader agricultural policy aimed at ensuring food security and supporting domestic producers, while maintaining Russia's strong position in global grain markets.

Russia remains one of the world's largest grain exporters, with wheat being its most significant commodity on the global market. Market analysts will closely watch how the updated export duties influence trading activity and pricing trends in the weeks ahead.

ANDRITZ TO DELIVER COMPLETE FEED PLANT TO ALWADI POULTRY FARMS, SAUDI ARABIA

International technology group ANDRITZ has received an order from Alwadi Poultry Farms Company, based in Riyadh, Saudi Arabia, to deliver a complete, high-capacity feed mill for the production of poultry and ruminant feed.

This order is a significant step in ANDRITZ's expansion in the feed industry in the Middle East and Africa (MEA) region.

ANDRITZ will supply the complete process lines – from raw material intake to finished product – including key machinery such as hammer mills, mixers, pellet mills, and crumblers, with major components coming from manufacturing facilities in Europe. The order also includes installation supervision, commissioning, and local after-sales support by ANDRITZ. With ANDRITZ's advanced technology, the plant will offer high efficiency and flexibility as well as robust process control – all tailored to provide high-performance animal feed solutions for the Saudi market.

Established in 1975, Alwadi Poultry Farms Company is one of the leading poultry producers in Saudi Arabia, with integrated operations spanning chicken breeding, hatcheries, feed production, and poultry processing. The investment in this new plant underlines the company's strategy to enhance its production capacity, feed quality, and market position.

Mr. Khalid Alsanie, General Manager of Alwadi Poultry Farms Company says: "With our long and distinguished history in the poultry sector, Alwadi Company has gained unparalleled experience. This experience has earned us the trust of our partners and consumers, and for many generations, our company has been a cornerstone of the poultry industry, built on a legacy of quality and a steadfast commitment to excellence. We are pleased to announce our collaboration with ANDRITZ in the field of feed mills and congratulate them on securing this contract with one of the largest and oldest poultry companies in the Saudi market. When the idea of establishing a new feed mill for Alwadi Company was conceived, a working team was formed consisting of the Production, Quality, Maintenance, and Technical Departments to study the price offers. After a thorough analysis, the team recommended choosing ANDRITZ for its quality, ease of maintenance, and outstanding technical presentation of the project."

Michael Lierau, Senior Vice President ANDRITZ Feed & Biofuel, adds: "We are honored to partner with Alwadi Poultry Farms Company on this significant project. With over 186 years of experience, advanced technology, and a strong presence in the region, we are committed to delivering excellence. This state-of-the-art, high-capacity facility sets a new benchmark in the region, and we're proud to contribute to Saudi Vision 2030 and its goal of achieving full self-sufficiency in the poultry sector by 2030."

This order demonstrates ANDRITZ's growing presence in the MEA region and reinforces its position as a complete plant solutions provider for the feed industry.

GMACH COMMISSIONS NEW 350 TPD FLOUR MILL FOR ETALON LTD IN KAZAKHSTAN

GMach Milling, a leading global provider of turnkey grain milling solutions, has successfully commissioned a new, fully automated flour mill in the Karaganda region of Kazakhstan.

The state-of-the-art facility, developed for Etalon Ltd, boasts a processing capacity of 350 tonnes per day and marks the latest in a growing series of GMach's projects across the country.

Designed with a steel-structured layout, the new mill is part of GMach's ongoing efforts to meet rising investor demand for high-efficiency, low-maintenance production facilities in Kazakhstan's agricultural sector. The facility's advanced technological and structural components were fully delivered by GMach as part of the turnkey solution.

Equipped with a comprehensive automation system, the plant significantly reduces labor and operational costs. It features specialized equipment for cleaning and sorting grains prior to milling, including trieurs and tempering machines that ensure optimal grain preparation. In line with sustainability goals, the facility also includes by-product management systems, converting separated light grains into valuable animal feed.

The mill incorporates energy-efficient electric motors to lower power consumption and enhance overall environmental performance. GMach has also prioritized product quality and food safety, installing compliant sifters to guarantee hygienic and secure flour production.

This new Karaganda mill forms part of a broader industrial complex, which includes

production, administrative, and logistics units. The facility supports the manufacture of flour in multiple formats to cater to diverse market requirements.

With nearly 60 turnkey milling projects and silo and machinery systems deployed in approximately 30 enterprises across Kazakhstan, GMach has established itself as a key player in the region's grain processing industry.

The company maintains two local branches, offering comprehensive support and after-sales services to clients throughout the country.

The successful delivery of this latest project underlines GMach's long-term commitment to supporting Kazakhstan's agricultural development through innovative milling technologies and localized service.

UKRAINE AND CZECH REPUBLIC SIGN MEMORANDUM TO STRENGTHEN AGRICULTURAL COOPERATION

In a significant step toward deeper international collaboration, the Minister of Agrarian Policy and Food of Ukraine, Vitaliy Koval, has signed a Memorandum of Understanding with the Minister of Agriculture of the Czech Republic, Marek Výborný. The signing ceremony took place in the presence of the Prime Ministers of Ukraine and the Czech Republic, Denys Shmyhal and Petr Fiala, underscoring the high-level commitment of both nations to advancing agricultural cooperation.

The memorandum sets the foundation for enhanced bilateral collaboration in a wide range of areas within the agricultural and food sectors. Notably, the agreement emphasizes support for Ukraine's integration into the

Key areas of cooperation outlined in the memorandum include:

- Harmonization of agricultural laws and regulations with European norms
- Development of animal husbandry, crop production, and aquaculture
- Improvement of veterinary and phytosanitary controls
- Strengthening food safety frameworks
- Promotion of bilateral trade in agricultural products
- Scientific, educational, and innovation exchanges
- Joint participation in exhibitions, fairs, and research projects

In addition, the agreement includes the establishment of a dedicated working group to coordinate the implementation of joint initiatives and ensure effective progress.

“This is not just a declaration of intent. It is a clear signal that Ukraine is moving forward towards a sustainable, competitive and European agricultural sector. And we are grateful to our Czech partners for their willingness to be part of this journey,” said Minister Koval following the signing.

strategy, offering new opportunities for knowledge sharing, innovation, and market expansion. It also reflects the Czech Republic’s continued support for Ukraine’s reform and integration efforts in the face of ongoing challenges.

With this agreement, both countries reaffirm their commitment to building a resilient, modern, and mutually beneficial agricultural partnership.

Bühler Unveils SORTEX AI700 Optical Sorter, Redefining Gluten-Free Processing with Advanced AI

Bühler has launched its most advanced optical sorting solution to date, the SORTEX AI700, in London. Leveraging deep learning and artificial intelligence (AI), the new machine sets a new benchmark in impurity detection, with its first application focused on removing gluten-containing grains—such as barley, wheat, and rye—from oats. This development plays a vital role in safeguarding the integrity of gluten-free food production.

The SORTEX AI700 represents a major technological leap, moving beyond traditional machine learning systems. Previous models, such as those in the SORTEX SpectraVision range, relied on algorithmic refinement guided by engineer input. In contrast, the AI700 employs Convolutional Neural Networks

(CNNs) trained on millions of labelled images. This allows it to differentiate materials with unmatched accuracy by analyzing color, shape, and texture.

"This is my most exciting project yet," says Melvyn Penna, Product Manager for the SORTEX AI700 and a key leader in Bühler's optical sorting advancements. "We've moved from engineer-driven adjustments to systems that learn and adapt through deep learning. This breakthrough enables unparalleled accuracy in identifying both acceptable and rejectable product."

For food processors, the commercial advantages are substantial. Enhanced defect detection translates into higher product quality and increased yields. "We've seen a significant improvement in removing unwanted grains while reducing false rejects," Penna explains. "This not only reduces waste but also boosts profitability. Real-world analyses show that even a 5–10% increase in reject concentration accuracy can deliver revenue gains worth hundreds of thousands of dollars annually."

The SORTEX AI700 arrives at a critical time for the food industry. Rising raw material costs, more frequent crop defects due to climate change, stricter regulatory standards, and growing consumer expectations have amplified the demand for precision in food processing. Bühler's AI-driven technology offers a timely and powerful solution to these emerging challenges.

"Bühler plans to expand the AI700's capabilities to a broader range of commodities in the near future."

The machine's first application addresses a pressing issue in allergen control. While oats are naturally gluten-free, they are often contaminated with gluten-containing grains during harvesting and processing. Traditional sorters meet basic standards but struggle with precise gluten removal. "With the AI700, we've achieved an unprecedented level of gluten grain removal, ensuring safer, high-integrity gluten-free oat products," Penna notes.

While the initial launch is exclusively focused on oats, Bühler plans to expand the AI700's capabilities to a broader range of commodities in the near future. The release of this innovative sorter underscores Bühler's long-standing commitment to food safety, innovation, and sustainable production efficiency.

The SORTEX AI700 marks a transformative moment in food sorting technology—offering processors new tools to improve quality, reduce waste, and meet the highest safety standards through the power of artificial intelligence.

USDA ANNOUNCES $14.5 MILLION FUNDING BOOST FOR STATE MEAT AND POULTRY INSPECTION PROGRAMS

U.S. Secretary of Agriculture Brooke L. Rollins announced that the U.S. Department of Agriculture (USDA) will provide an additional $14.5 million in reimbursements to support state-operated meat and poultry inspection programs. The funding increase, authorized under the USDA's existing authority, aims to ensure the continued safety and availability of American-produced meat and poultry products.

"This funding is critical to safeguarding the food supply chain and supporting state inspection programs that are on the front lines of ensuring meat and poultry products are safe for American families," said Secretary Rollins. "Without this support, states may face challenges maintaining these vital inspection operations."

State meat and poultry inspection programs, which operate under cooperative agreements with the USDA's Food Safety and Inspection Service (FSIS), are essential to overseeing locally produced food products. These programs must maintain standards equivalent to those of the federal inspection system.

The $14.5 million reimbursement increase will help states meet rising operational costs and staffing needs, enabling them to continue high-quality inspection services without interruption. These services are key to ensuring consumer confidence in the safety of meat and poultry products and supporting local producers in bringing their products to market.

"This investment not only protects public health, but also strengthens our food system and supports economic activity in rural communities," Secretary Rollins added.

The USDA reaffirmed its commitment to working closely with state partners to maintain strong and reliable food safety systems across the country.

Ukraine and Sweden Sign Memorandum to Strengthen Agricultural and Food Sector Cooperation

Ukraine and the Kingdom of Sweden have taken a significant step toward enhancing bilateral collaboration in the agricultural, fisheries and food sectors by signing a Memorandum of Cooperation. The agreement was formalized by Ukraine's Minister of Agrarian Policy and Food, Vitaliy Koval, and Sweden's Minister for Rural Affairs, Peter Kullgren, during an official ceremony in Brussels.

This memorandum, which will remain in effect for an initial period of three years with an automatic renewal clause for another three years, marks a pivotal moment in the growing partnership between the two nations. It builds upon recent diplomatic progress, including the official launch of the "Buy Ukrainian Products" initiative in Stockholm.

"This is a historic step," stated Minister Vitaliy Koval. "Sweden has once again proven that it is a reliable friend of Ukraine. I am confident that our partnership will benefit the development of the agricultural sector in both countries."

The agreement outlines a comprehensive framework for collaboration across several key areas:

- Restoration and Reconstruction: Joint projects will focus on rebuilding Ukraine's agricultural value chains and infrastructure, significantly impacted by ongoing challenges.
- Commercial, Scientific, and Technological Cooperation: The memorandum aims to facilitate stronger connections between governmental, research, and private institutions in both countries, particularly in agriculture, fisheries, food production, and irrigation.
- EU Harmonisation: One of the document's strategic objectives is to align Ukrainian agricultural and fisheries legislation with European Union standards, promoting greater integration and cooperation with EU markets.
- Sector-Specific Collaboration: Targeted partnerships will be encouraged in industries such as grain production, horticulture, poultry and livestock farming, dairy processing, fish processing, and niche crop cultivation.
- Food Industry Development: The agreement supports joint efforts in the production and advancement of modern, competitive, and sustainable food industry practices.
- Sustainable Agriculture: Sweden will assist Ukraine by sharing its expertise in sustainable and environmentally friendly farming techniques.

"This is a historic step," stated Minister Vitaliy Koval. "Sweden has once again proven that it is a reliable friend of Ukraine. I am confident that our partnership will benefit the development of the agricultural sector in both countries."

Global Wheat Outlook: Stable Production Amidst Mixed Crop Conditions and Market Uncertainty

The latest Agricultural Market Information System (AMIS) report indicates that global wheat production for 2024 remains nearly unchanged this month, continuing to be slightly above the previous season's level but still below the record set in 2022.

Despite stable production estimates, global wheat utilization for the 2024/25 marketing year is expected to increase marginally, supported primarily by expanded consumption in Argentina and the European Union. However, global wheat trade for the same period has been trimmed due to weaker import demand from Türkiye and lower anticipated exports from the Russian Federation, resulting in a steeper decline in trade volumes compared to the previous season. Stocks projected to end in 2025 have been lowered slightly from last month, reflecting cuts in inventories within the EU and Türkiye, but overall global stock levels are still expected to increase marginally above their opening levels.

Crop Conditions and Regional Developments

Crop conditions across major wheat-producing regions remain mixed, with dry weather continuing to raise concerns in parts of Europe, the Russian Federation, Türkiye, Ukraine, and the United States. In the European Union, conditions for winter wheat are generally favorable, although additional rainfall is needed in Austria, Czechia, Germany, and Poland to sustain crop development. Türkiye faces challenges from prolonged dry weather and two recent cold spells, which have delayed crop growth and lowered yield prospects. The Russian Federation is seeing a range of conditions; while some areas have benefited from overwinter precipitation, others require more moisture to support growth, as spring wheat sowing gets underway. Ukraine is experiencing a precipitation deficit since the start of the year, beginning to stress winter wheat development. Meanwhile, Kazakhstan's winter wheat remains in favorable condition, with spring wheat sowing progressing in the south. China's wheat crops are also reported to be in good condition, with spring wheat sowing continuing as planned. In India, harvesting is concluding under favorable conditions in the main producing states. However, the US Great Plains are experiencing drought stress due to a lack of substantial spring rainfall, affecting key winter wheat-growing states, although spring wheat planting has started. Canada's winter wheat conditions are favorable in Ontario and Quebec but remain under observation in the Prairies.

Market Prices, Policy, and Futures Outlook

Policy developments in several countries are also influencing wheat market dynamics. On April 3rd, South Africa and its Southern African Development Community (SADC) partners significantly reduced import duties on wheat grain and wheat flour, cutting tariffs almost by half, which aims to reduce costs for consumers and processors in the region. On April 15th, Egypt increased its wheat procurement price for the 2025 harvest season to EGP 2,200 per ardeb (approximately USD 287.58 per tonne), signaling stronger government support for domestic producers compared to last year's procurement price. Furthermore, on April 22nd, the Russian Federation lifted its temporary import ban on wheat from Kazakhstan, a restriction that had been imposed since October 2024, following a decision by Rosselkhoznadzor, the Federal Service for Veterinary and Phytosanitary Supervision. This reinstatement is expected to ease trade flows between the two countries.

International wheat prices displayed mixed trends in April. The IGC GOI wheat sub-Index posted a slight month-on-month increase, supported by a weaker US dollar and rising maize prices. Nevertheless, overall price gains were limited by broad macroeconomic uncertainties and improved weather conditions across major Northern Hemisphere wheat-growing

regions, which reduced supply concerns. In the United States, wheat prices initially benefited from the USDA's unexpectedly low forecast for 2025/26 all-wheat plantings and favorable currency movements. However, prices for US winter wheat declined due to slowing export sales and improved crop conditions. Similarly, the European Union market experienced weak sentiment as rainfall eased drought stress in some areas, while the euro's sharp appreciation raised concerns about the region's export competitiveness. In the Russian Federation, wheat prices softened amid subdued international demand and shifting market attention toward spring planting activities. Conversely, wheat prices in Australia strengthened, buoyed by seasonally strong export activity.

Wheat futures prices continue to face pressure amid persistent tariff-related uncertainties and favorable weather conditions supporting robust crop development. United States cash wheat, which forms the basis for Chicago Mercantile Exchange (CME) futures, remains competitively priced relative to US maize and EU wheat, but demand remains weak. Although this price competitiveness could encourage greater feed usage and export activity, potentially providing a price floor, such demand responses have yet to emerge significantly, keeping futures prices subdued.

Looking forward, the AMIS report emphasizes the need to monitor evolving weather conditions, trade policies, and macroeconomic factors as key drivers shaping the wheat market outlook. With the Northern Hemisphere winter wheat harvest approaching, market participants remain cautious amid ongoing uncertainties.