



Australian Export Grains Innovation Centre

# Australian oats

## Health and quality for Asia

Webinar: June 2025



Department of  
Primary Industries and  
Regional Development



AEGIC is an initiative of the Western Australian State Government and Grains Australia





# Australian Oats: Driving Innovation and Growth in Asia

June 2025





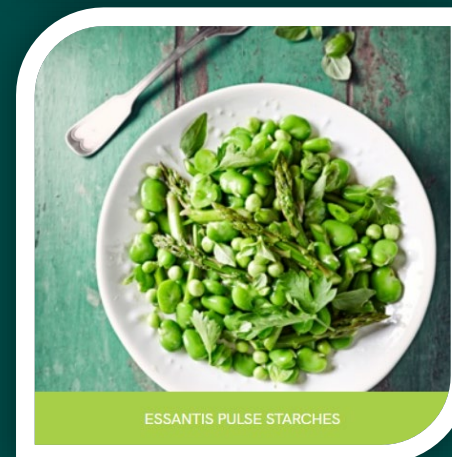
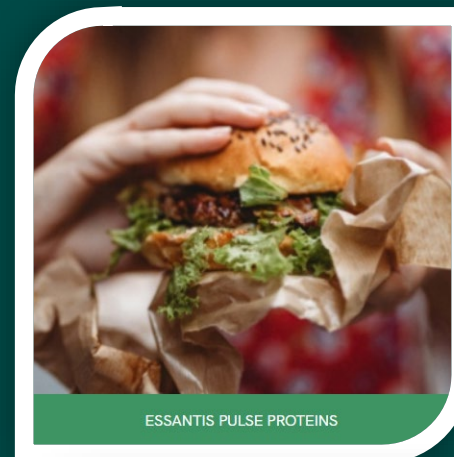
# Who we are

We are passionate and inspired producers of plant-based food products and ingredients...

- Australian based, with a strong focus on supporting the Asia Pacific region
- We produce high quality oat and pulse based ingredients
- Dual footprint: Victoria and Western Australia
- WA (Wagin mill) site central to our Asian export strategy
- Trusted by partners across Asia for premium oat ingredients



# Our products





# WA oats – premium positioning

Western Australia delivers the ideal oats for premium food innovation in Asia...

- Ideal growing climate and sun ripened (glyphosate free)
- Large and consistent oat crop. World leading oat growers
- Increasing focus on sustainability
- Clean, reliable grain performance for premium food use
- Strategic location: fast access to Asian ports





# Matching Asian market needs

Alignment with Asia's health-conscious, convenience-driven consumers...

- Demand for clean label, plant-based ingredients
- Rising interest in heart and gut health (beta-glucan)
- High versatility in functional and convenient formats
- Safe, premium and traceable by Asian consumers





# Food applications for WA oats

WA oats are the foundation for a wide range of everyday and emerging food products...

- Breakfast: Instant oats, muesli, granola
- Snacks: Bars, biscuits, energy balls
- Beverages: Oat milk, RTD health drinks
- Bakery: Breads, cakes





# Innovation at Essantis

We innovate with purpose — tailoring oat products for evolving Asian markets...

- Dedicated focus on oat milk product development
- Custom processing and tailored formulations for Asian market preference
- Increased focus on nutritional and functional characteristics
- WA oat flour production dedicated to servicing Asia





WA oats – functional, safe  
and export ready

Essantis: bridging WA quality  
and Asian market demand

We welcome collaboration  
on oat-based innovation



# Thank you



## Stay in touch with us

If you'd like to get in touch, we'd love to hear from you.

We are passionate about nutritious Australian grown food and beverage ingredients, and would welcome the opportunity to partner with you towards making a healthier and more sustainable future.

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# Why Oats Are On a Roll

Theresa Pham - Nutrition Manager

Toni Gam - Industry Engagement Manager



# The Grains & Legumes Nutrition Council (GLNC)

GLNC is a not-for-profit and health promotion charity

It is the nutrition knowledge centre on grains and legumes

GLNC educates and collaborates with partners to improve the health of all Australians



# Health Benefits

Oats are a functional food and whole grain

Oats contain **beta-glucans**, which slow digestion, improve gut microbiota and lower serum cholesterol levels

Oats are linked to a **lowered risk of type 2 diabetes** and **cardiovascular disease**

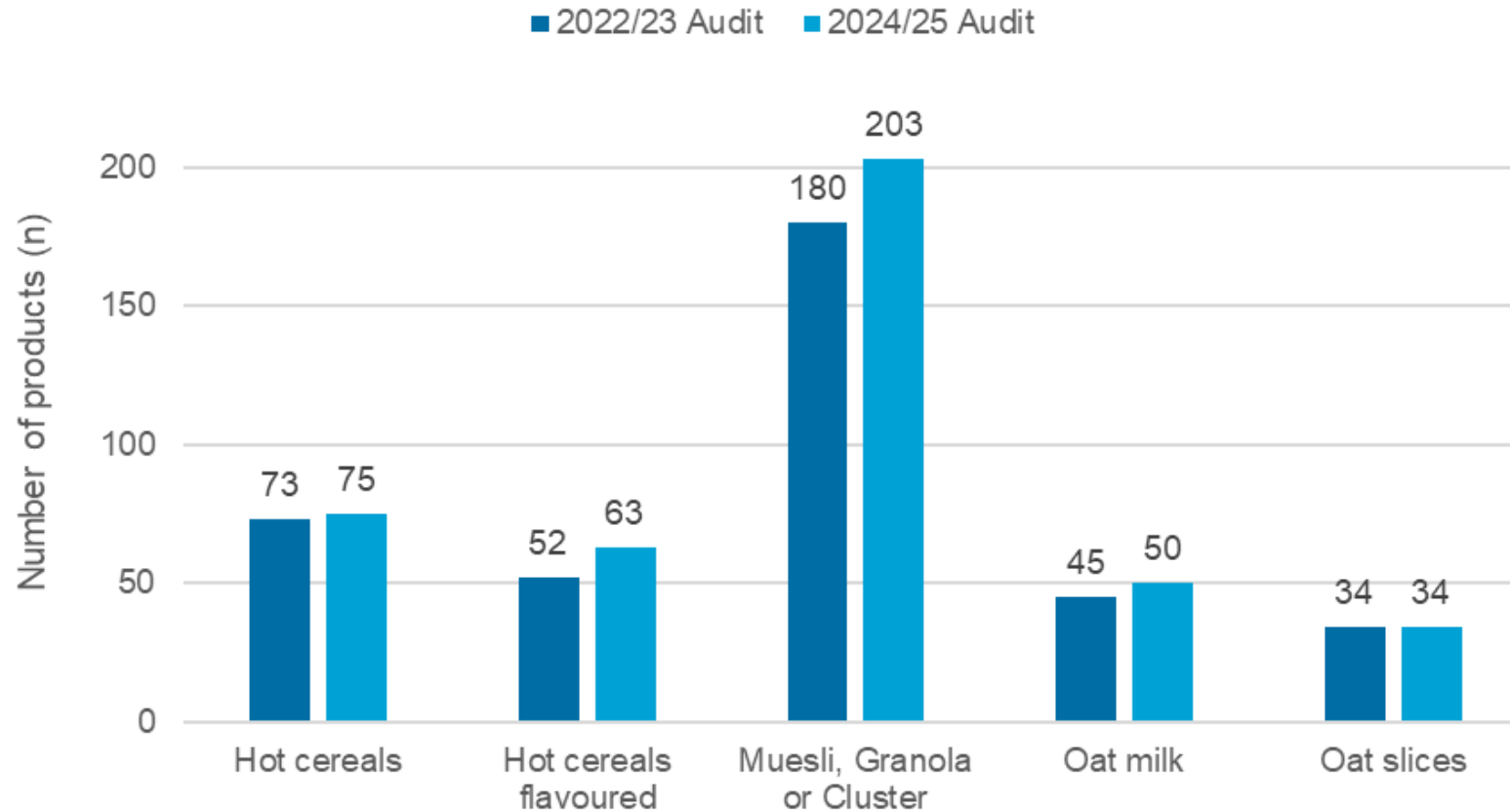


Grains &  
Legumes  
Nutrition  
Council



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# Oat momentum



Source: GLNC Market Insights Audit 2022-2025

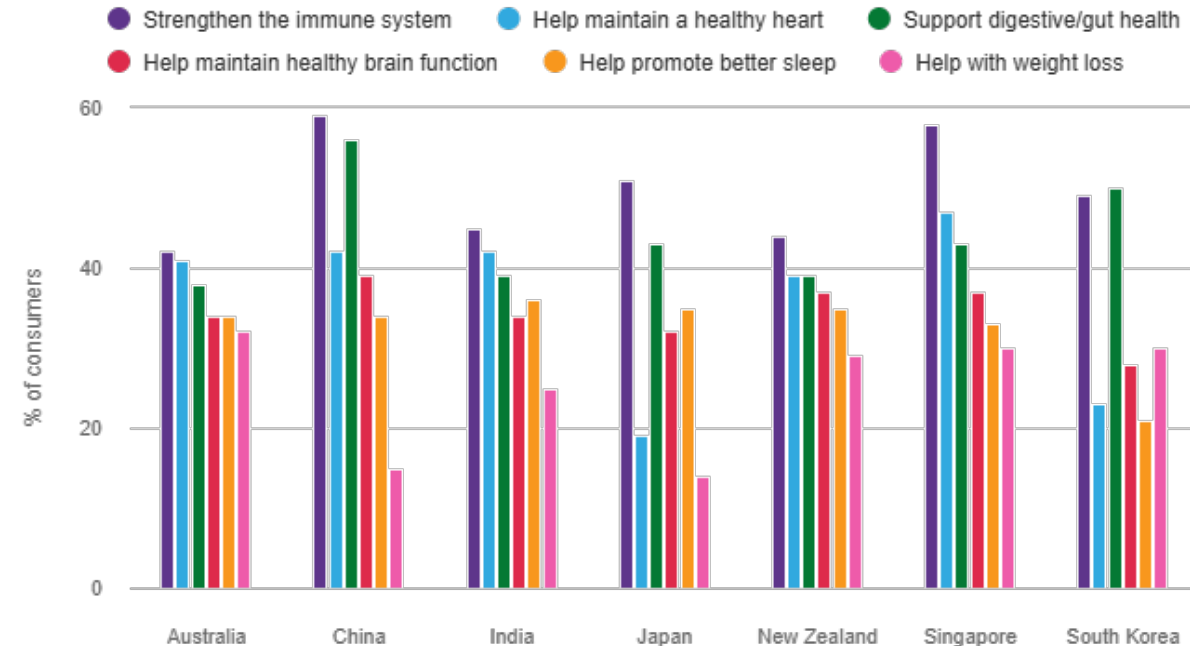
Oat-based products have continued to increase across multiple categories over a two-year period

# Health as a Key Driver

Consumers are seeking out foods that support **heart health, gut health and satiety**

Using food to increase nutrient intake

Growing preference for natural ingredients and a **preventative approach** to health



Benefits APAC consumers would like their diets to provide  
(*Mintel, 2022*)

# Heart Health as a Key Driver

70% of Chinese and Singaporean consumers see heart health benefits as a marker of value in food and drink

Beta-glucans help lower cholesterol, supporting heart health

+17% in products displaying claims linking beta-glucan to heart health since 2023



# Digestive Health as a Key Driver

Digestive health is a key concern for 53% of Japanese and 41% of Indian consumers

Oats, rich in soluble and insoluble fibre, support digestive health

In 2025, over three-quarters of oat-based products display a fibre claim on pack – 6% digestive health-related claims



# Natural Energy as a Key Driver

Oats are a whole grain that provide steady energy throughout the day

Globally, 36% of consumers choose whole grains (including oats) to help them **feel fuller for longer**

12 oat-containing mueslis stated *energy source* from whole grains



# Health Trends

Oats are naturally **plant-based**, making them popular and more versatile than other grains

Strong demand for **protein-rich products**, with oats being leveraged as a plant-based protein source alongside other ingredients

Oats are **environmentally friendly** compared to other foods



# Why Oats Are on a Roll

Continuous growth and innovation of oat-based products across categories

Rising demand for **natural ingredients with health benefits** across APAC aligns with what oats can offer

Opportunity for companies to **display claims that enhance consumer knowledge**



Grains &  
Legumes  
Nutrition  
Council



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# Thank you

## References

Paudel, D., Dhungana, B., Caffè, M., & Krishnan, P. (2021). A review of health-beneficial properties of oats. *Foods*, 10(11), 2591. <https://doi.org/10.3390/foods10112591>

Mintel. (2024). *A year of innovation in functional food & drink*.

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# The future of oats: Global trends & opportunities for Aussie oats

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**Shannen Davies**  
**2024 Nuffield Scholar**

Sponsored by:



**Processed Oat  
Partnership**



**GIWA**  
Grain Industry Association  
of Western Australia



# Introduction

Farming with family in the Western Australian wheatbelt

- 4,500 ha (11,000 acres) of oats, canola, wheat, barley and lupins + 3,000 Merino x Poll Dorset sheep



Communications Manager  
for InterGrain - Australian  
oat, barley and wheat breeding



# Nuffield

**NUFFIELD**  
AUSTRALIA



- Nuffield – International Scholarship for farmers and agricultural professionals to travel overseas to research a topic that will benefit their industry
- 14 weeks international travel, visiting farms, research centres and agribusinesses to gain new insights and global perspectives
- Supported by industry partners



# Nuffield topic - The future of oats: Global trends & opportunities for Aussie oats

## Why oats?

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- **High global demand** for Australian oats
- **Shift from feed to food** – now a high value crop
- **Rising investment**
  - AEGIC, GRDC, Western Australia State Government Processed Oat Partnership
  - Privatised breeding = faster genetic gain
- **Product innovation** – new uses across food, beverage, skincare & more

## My Nuffield aims:

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- Understand **global trends**
- What are the **opportunities** and **risks** for the Australian oat industry
- Is the current **pricing model** working?



# Global oat insights

## Canada



- Exporting mainly to USA
- Competition in breeding
- Strong gluten free market
- Tariffs – unknown impacts

## UK



- New processors
- Domestic consumption within UK & EU
- Gluten free market
- Oat-based products increasing and oat milk is leading plant-based milk

## Scandinavia



- Breeding for application & use
- Consider oats in '*plant protein*' discussions
- Innovative product development (the 'oat drink' creators)

## Chile



- Production & export increasing
- 2<sup>nd</sup> largest product exporter in 2023
- Modern milling technology
- 24 exporters
- Mostly supplying South America



# Australian oats

Feedback received throughout travel



Market development through AEGIC,  
Grains Australia and breeding companies



Sustainable farming systems



Investment into breeding through  
End Point Royalty system





# Opportunities for Australian oats

- **Gluten free market**
- **Oats for protein**
- **Sustainability** – telling our story
- **Price discovery** – pricing system reflect premium food product
- **New products** – move beyond breakfast
- Continuing to **build on relationships** and understanding our customers needs
- **Cosmetics** – understanding growth & opportunity



*'Good oats, eat Seamild'*  
Image taken at a WA farm with the team from Seamild



# Thank you

My Nuffield Scholarship is sponsored by the Grains Industry of Western Australia (GIWA) and the Processed Oat Partnership through the Western Australian State Government

Nuffield Australia and InterGrain for their support





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# New oat product and labelling trends in Asia

Trend analysis based on the Mintel  
Global new product launched database (2004-2024)

Dr. Hemali Kanthilanka



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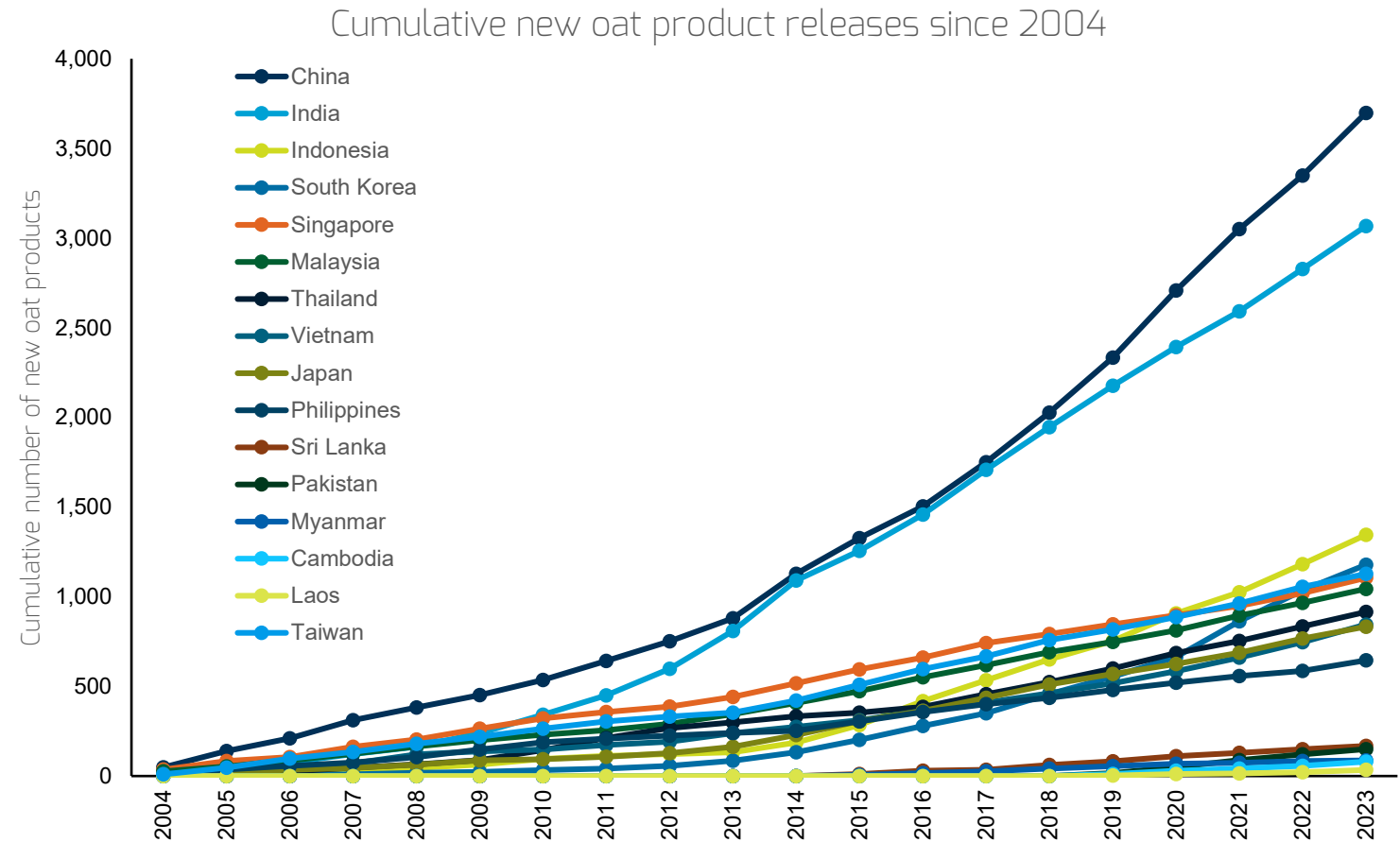


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# Trends of new oat product releases in Asia

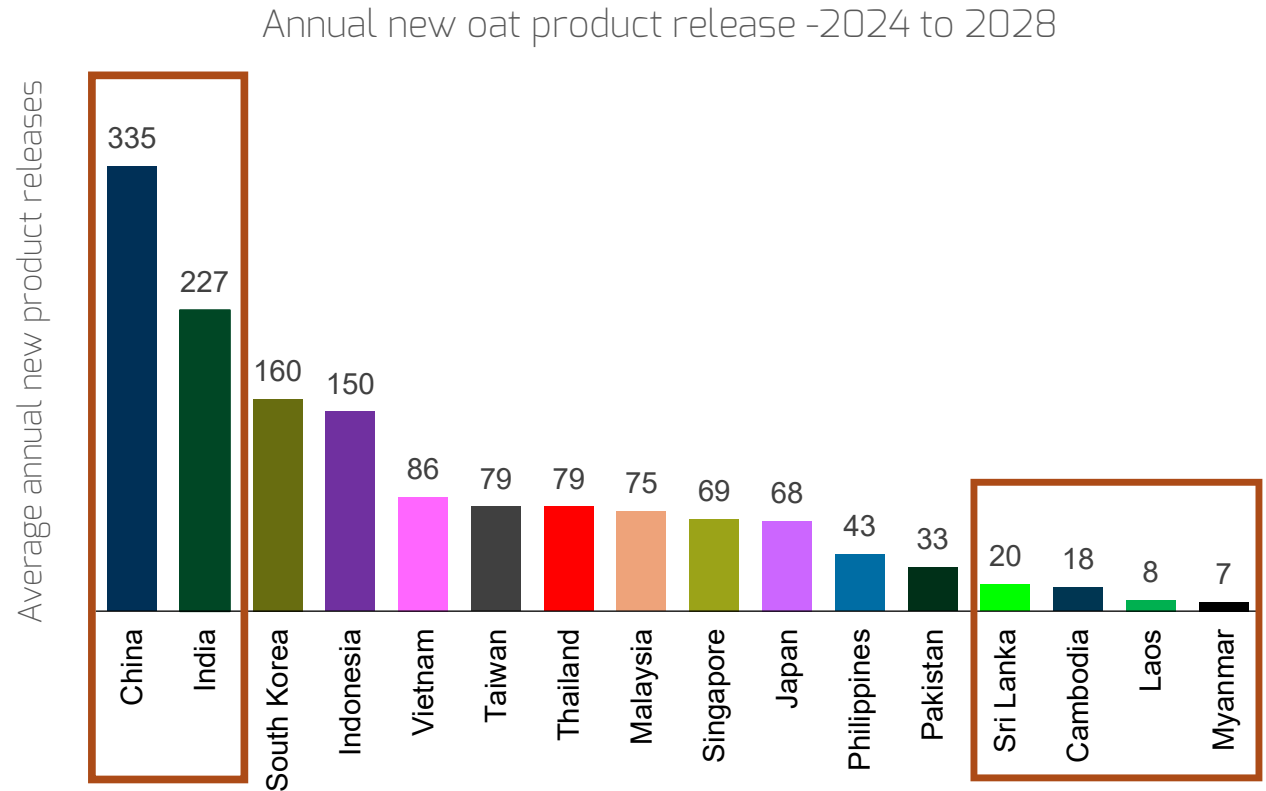
- Strong preference for oats: Increasing number of new product releases



Source: Mintel

# Trends of new oat product releases in Asia

- High variability of annual new products releases in Asian markets



Source: Mintel

# Trends of new oat product releases in Asia

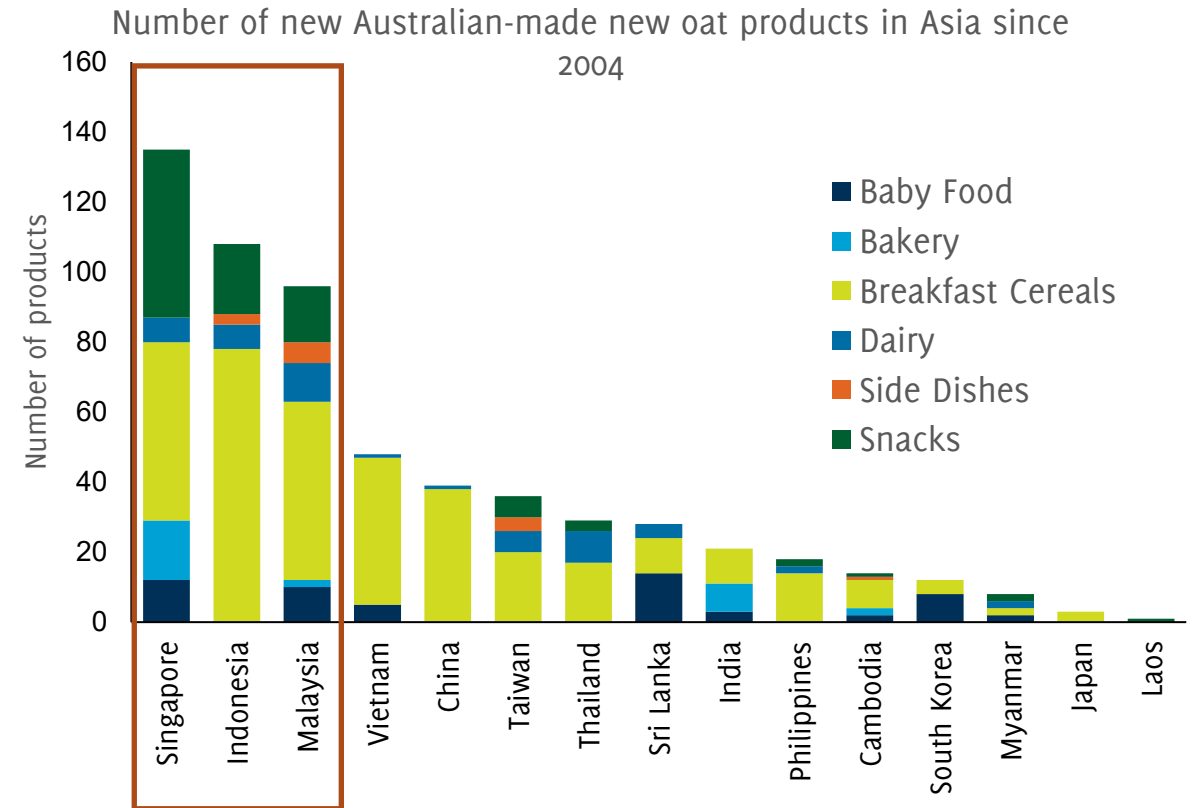
- Breakfast cereal, bakeries and snacks dominate
- Opportunity for innovative products

Category	Share (%)
Breakfast Cereals	48%
Bakery	22%
Snacks	13%
Dairy alternatives (include oat milk)	11%
Baby Food	3%
Meals & Meal Centres	2%
Side Dishes	2%
Processed Fish, Meat & Egg Products	1%

Source: Author's calculation based on Mintel data

# Australian-made oat product releases in Asia

- Australian-made products: 596
- Dominated in breakfast cereal (58%), snack (17%) and baby food (10%)



Source: Author's calculation based on Mintel data

# Most frequently used claims on the oat product label

Top 5 claims by frequency of use in products

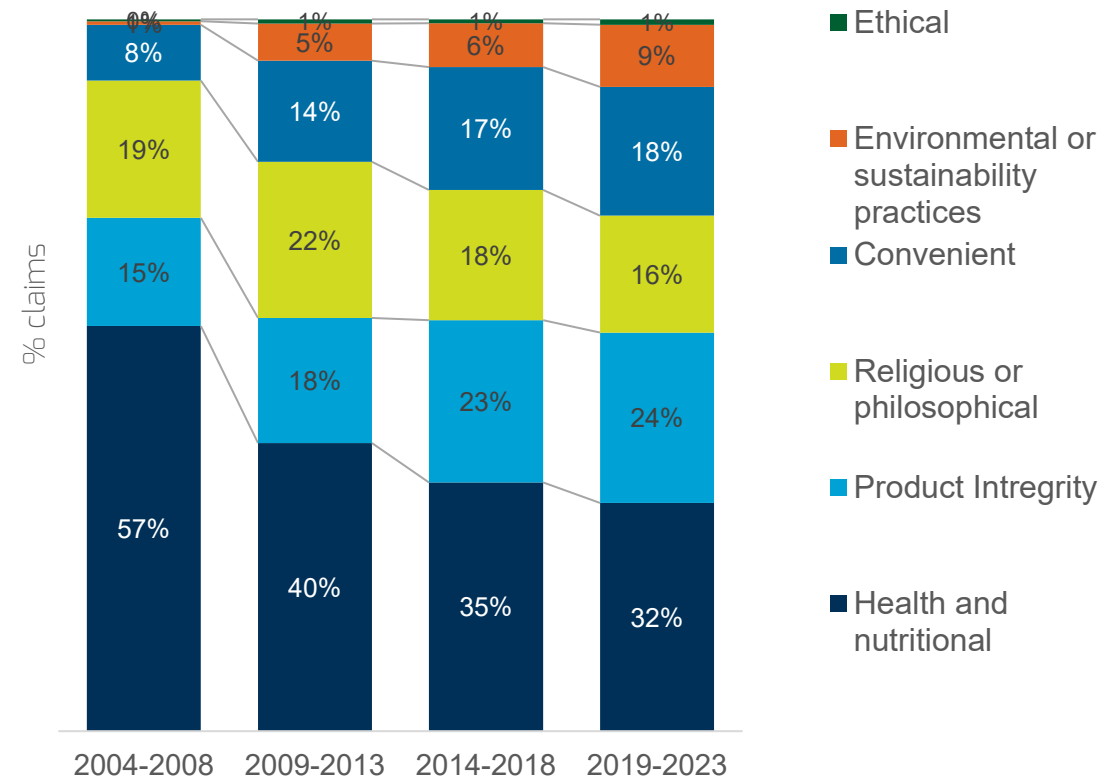
- Growth in the number of claims
  - 31 unique claims in 2004 to 95 in 2024

High/Added Fibre	4,859
Wholegrain	4,508
Vegetarian	4,479
No Additives/Preservatives	4,155
Ease of Use	2,444

Source: Author's calculation based on Mintel data

# Trends of claims on the oat product label

- Health & nutritional, and product integrity characteristics are dominant
- Environmental or sustainability claims are emerging



Source: Author's calculation based on Mintel data

# Conclusion

- The number of new oat product releases indicates strong and growing consumer interest in oat-based foods.
- Many new product releases are in the breakfast cereal, snack space - new product innovation will grow the opportunity over time.
- Australia is renowned as a source of high-quality and safe raw and processed oats with this often reflected in branding strategies.



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# Thank You....!

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# Innovative and healthy ways to incorporate oats into your diet

Dr Sabori Mitra

Senior Research Scientist - Oats

June 2025



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Primary Industries and  
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# Overview

Australian oats are well positioned to meet future demand

Australian oat export market

Opportunities to include more healthy oats in diet

# Australian oats are well positioned to meet future demand

Australia is a high-quality producer of feed and food grade oats

Australia is the second largest oat exporter, Western Australia (WA) is the main exporting state

Opportunities to improve consumers health



Source: © 2022 – William Reed Ltd.



Source: © Dotdash Media, Inc. 2022



Source: © Dotdash Media, Inc. 2022



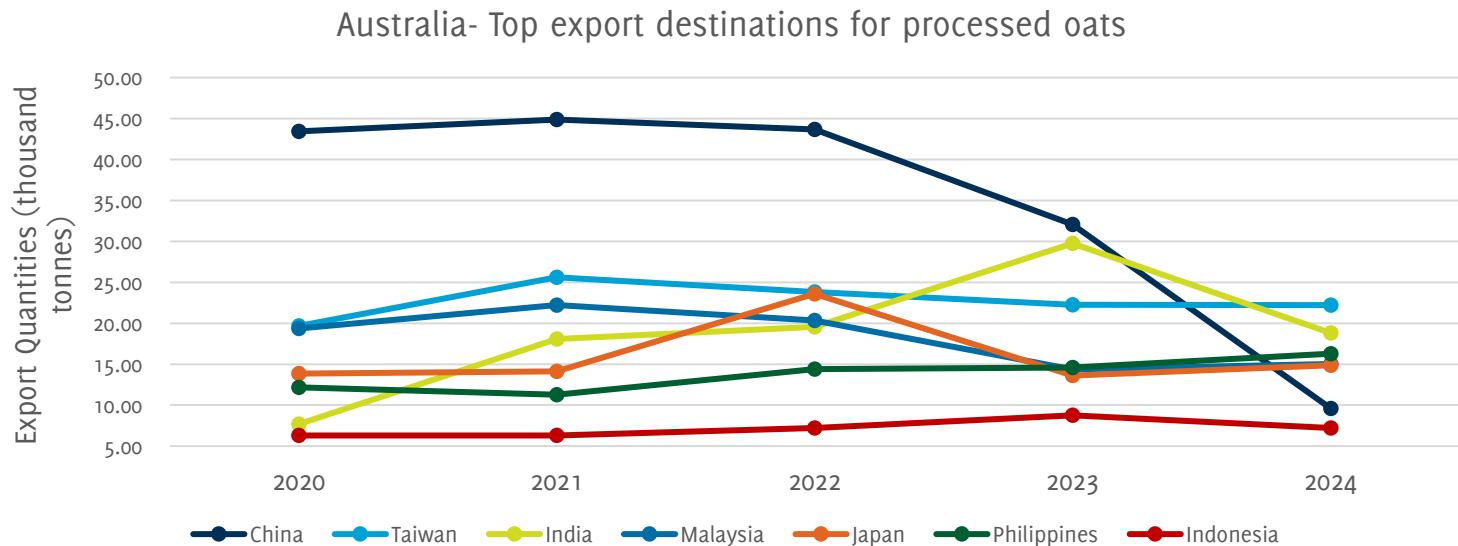
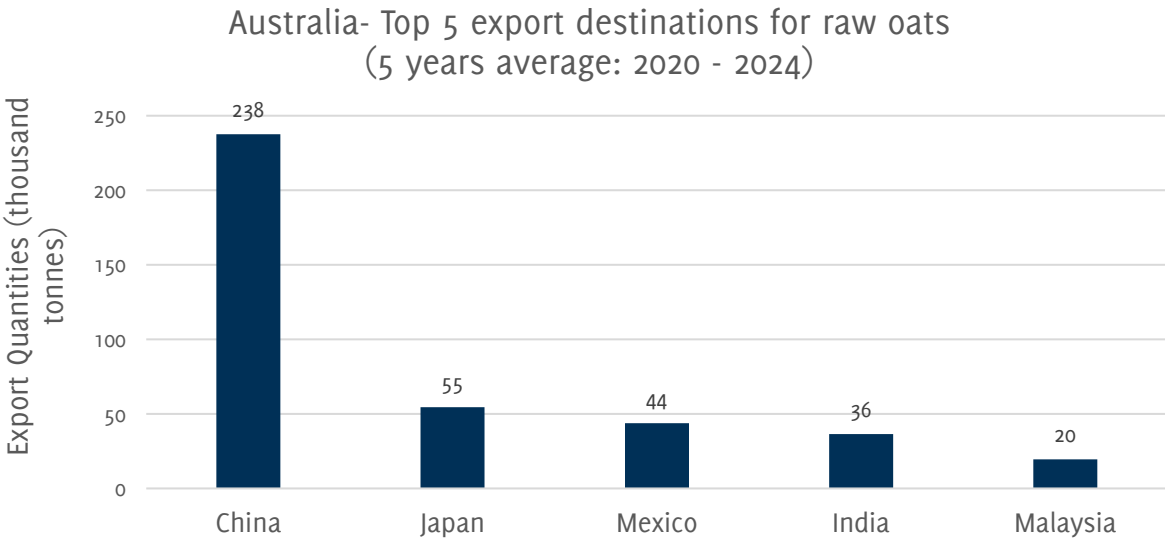
Source: China Daily Information Co © 1995-2022

# Australian oat export market

Produces: 1.5 MMT of oats (on average)

Exports : 400,000 tonnes of oats (on average)

Export Value: over \$200 million (on average)



Source of graph data: Australian Bureau of Statistics

# Accessing health benefits of oats: AEGIC research

Nutritious oats



AEGIC's research



More oat food options

Innovative  
products



Fortification of  
traditional  
products

Versatile oat  
ingredients

**AEGIC provides technical market solutions to oat industry**

# AEGIC's oats innovation

Move oats beyond breakfast to a go-to option for lunch and dinner



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Asian rice and noodle dishes

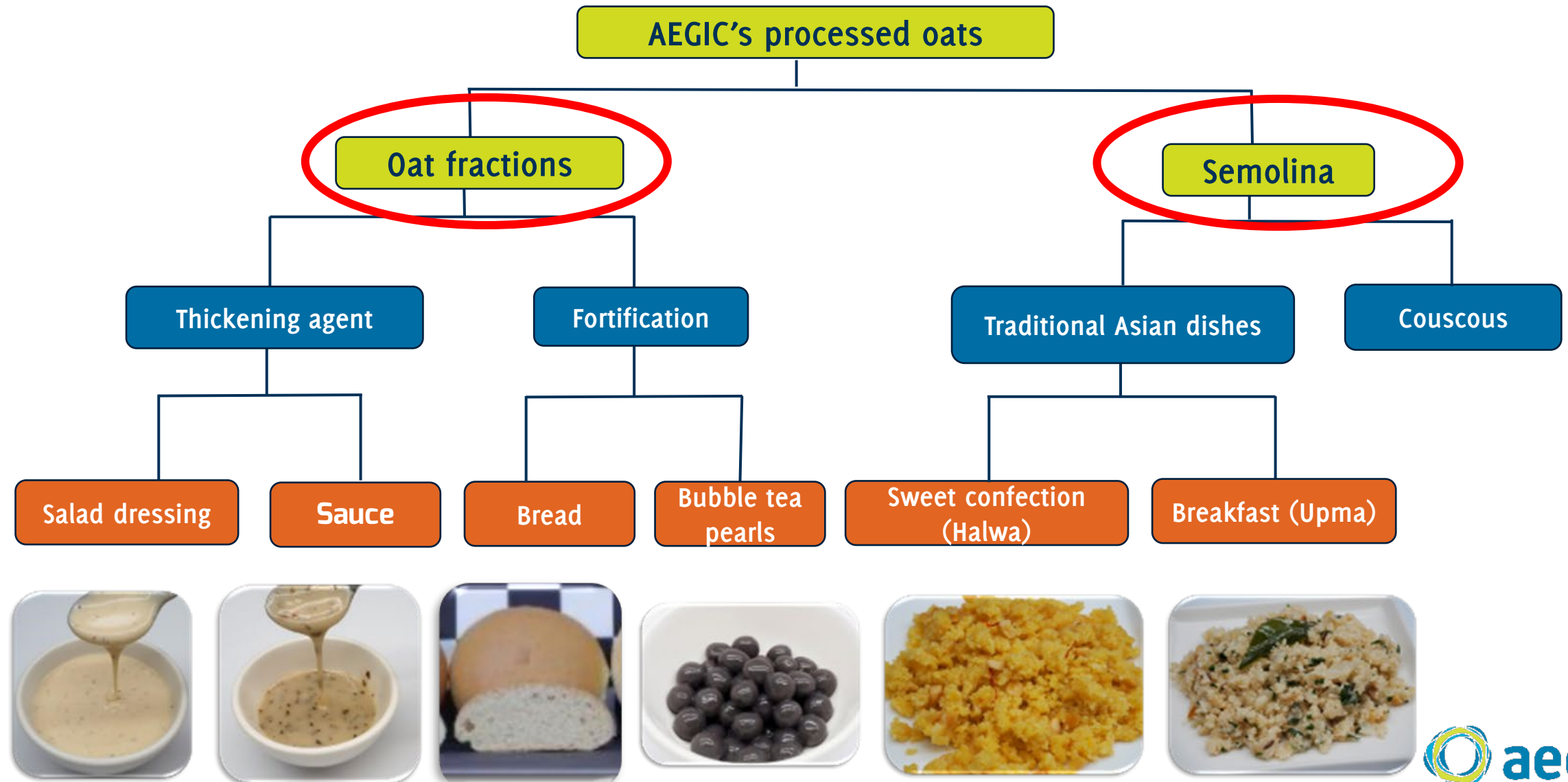


©2024 CHOOSING CHIA



AEGIC oat rice and oat noodles

# Application of versatile oat ingredients



# Fortification of traditional Asian foods with oats

## Asian traditional food



Indian Snacks Recipes - 216 Evening Snacks (indianhealthyrecipes.com)



Waroeng Mami Jeanne | Figma Community

## Oat flour



Waroeng Mami Jeanne | Figma Community

## AEGIC Trials



Honeycomb cake



Layered cake



Papad

↓ Carbohydrate

↑ High protein

↑ Dietary fibre

↑ Beta-glucan

# Summary

Australian oats and oat products are well positioned to meet the growing health-conscious markets of Asia

Innovation will continue to support oat growth in food markets

AEGIC welcomes collaboration with industry to achieve practical outcomes for the entire value chain



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# Acknowledgements

- Grain Research and Development Corporation (GRDC): *2015 – 2019*
- Department of Primary Industries and Regional Development (DPIRD): *2020 – 2023*
- Processed Oats Partnership (industry-led program) supported by Western Australian State Government: *2023- 2026*



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# AEGIC Oat Research Team

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# Australian oat quality trait preference in Asia

Dr Nabeen Dulal  
Research Scientist – Oats  
June 2025



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Primary Industries and  
Regional Development



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Image credit: ©OKEA - STOCK.ADOBE.COM

# Oats: For Asian market

Aligning the quality of new oat varieties for oat products with the market requirements

Evaluating oat varieties and varietal response to different processes and end-product quality

Understanding oat functionality and their relationship with various aspect of processing

# Oat grain qualities: Trading plus more

Hectolitre weight (kg/hL)  
*(Milling yield indicator)*

Screenings (%)  
*(Plumpness)*

Thousand kernel weight (g)  
*(Uniformity of grain sizes)*

Colour  
*(Grain and Groat)*

Groat percentage (%)  
*(Better milling efficiency and value)*

Grain morphology and hardness



# Oat processing quality

## Processing efficiency

*(Dehulling, milling of oats and flakes)*

## Milling yield

*(Oat groats, flakes or flour)*

## Enzymes activity

*(Shelf stability, lipase activity)*



Images source © 2025 Nutrition for running, schule mühlenbau 2024 and Buhler group

## Product quality: Oat flakes

## Beta-glucan and other nutritional profile

## Texture, flavour and aroma of oat flakes

## Specific weight

# Water absorption

## Thickness and size of oat flakes

## Colour and integrity of oat flakes





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- AEGIC oat research team
- Dr Chris Carter - A/General Manager – Insights and Engagement



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# Your feedback and preference survey is important for us

**Feedback and Technical Survey**

