

# 2018/2019 Pilot Malting & Food Barley Variety Rationalisation Plan for WA

V1.28th August 2017

**Market Preferences for Malting Barley in Western Australia:** The challenge for the Western Australian barley industry is converting multiple market varietal preference signals over long breeding, accreditation and commercialisation timelines back to growers through the storage and bulk handling system.

**Rationalising Varieties in the WA Bulk Handling & Storage System:** The long term aim of the Western Australian barley industry is to rationalize the number of varieties segregated to two major malt varieties per port zone, with limited segregations on offer for minor, new or niche malt varieties. The benefits for growing and segregating fewer malt varieties include the ease of logistics, more segregations per variety and stronger demand from the trade who are currently unwilling to risk buying small, unsaleable parcels of grain. This is why the Barley Council of the Grain Industry Association of Western Australia and CBH have worked to produce a **Pilot Barley Rationalisation Plan 2018/2019** [www.giwa.org.au/barley-council](http://www.giwa.org.au/barley-council) to help growers plan segregations at area level in the four port zones in WA. Planning for the pilot commenced at the GIWA Barley Rationalisation meeting in June 2017 and at CBH bin meetings in spring 2017 for two harvests out ie for the forthcoming 2018/2019 harvest.

**Industry Consultation Process:** Grower estimates and CBH bin meetings are a key component of this planning process. In addition to CBH bin meetings the key industry meetings in WA in 2018 to discuss barley variety rationalisation are the GIWA Barley Autumn Forum on 23 March, the GIWA Barley Rationalisation Meeting on 28 June (which reviews the 2018/19 plan and starts the pilot barley rationalisation planning for the bulk handling & storage system for two harvests out ie 2018/2019) and the GIWA Barley Spring Forum on 14 and 15 August which rotates locations around the state each year. Please distribute this information amongst your networks.

We encourage feedback, please contact Will Piercey Lyndon Mickel or Larissa Taylor (contact details below).

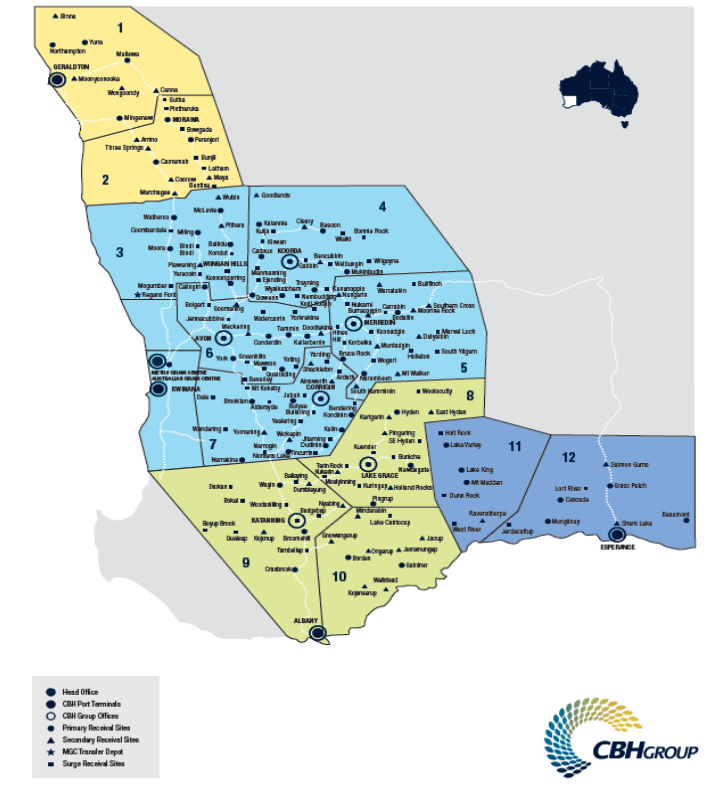
## Western Australian Malt and Food Barley Variety Receival Recommendations for the 2018/2019 Harvest

- Bass, La Trobe and Scope CL will be the main malt barley varieties.
- Flinders has gained traction with international customers of Australian malt and Australian barley. Demand is expected to grow as volume grows.
- Granger is still new to the market with limited segregation opportunities to be expected until full market acceptance is achieved. Further international market feedback is needed to provide guidance to the Western Australian barley industry on the expected future demand for this new malt variety.
- Baudin will have limited segregations at the 2018/19 harvest in the Esperance Port Zone. Growers in Kwinana-West and Albany-North looking to grow Baudin for malt in 2018 should talk to their preferred acquirer to determine opportunities for contract production into a niche segregation before planting any seed.
- Segregation opportunities for Bass, Baudin, Flinders, Granger, La Trobe and Scope CL vary by port zone and within a port zone (Table 1).
- Varieties differ in their market preference (Table 2) which may influence the number of buyers and the pricing offered. Bass and Baudin are the preferred varieties for export as grain, Baudin for export as malt and Baudin and La Trobe for the manufacture of shochu in Japan.
- Hindmarsh has been removed from the list of varieties that will be segregated in Western Australia after the 2017/18 harvest. Production of Hindmarsh in 2018 will be directed into feed stacks. The removal of Hindmarsh from the segregated list will increase the demand for La Trobe in the shochu market in Japan as none of the other segregated varieties except Baudin are accepted into that market.

Table 1. Western Australian malt and food barley industry variety recommendations by Port Zone for the 2018/19 harvest

Port Zone	Geraldton	Kwinana		Albany		Esperance	Comment
(~% of total barley area)	~5%	~40%		~30%		~25%	
		Western	Eastern	Northern	Southern		
<b>YES</b>	This is a recommended variety for this production zone.						
<b>Limited</b>	Limited segregations likely due to low production hectares, limited market demand, a new variety going through market development or phasing out an old variety.						
<b>Niche</b>	Subject to availability. Niche segregation only available if a marketer has sufficient tonnage to supply to a domestic or international customer. Marketers will need to contact CBH to negotiate a niche segregation and growers will need to contact their preferred marketer for availability.						
<b>NO</b>	Variety has been phased out or marketers are not looking to accumulate this variety in this production zone.						
<b>Malting varieties</b>							
<b>Bass</b> (b)	NO	YES	NO	YES	YES	NO	Stable market demand
<b>Baudin</b> (b)	NO	Niche	NO	Niche	NO	Limited	Preferred variety with stable market demand
<b>Flinders</b> (b)	NO	Limited	NO	Limited	YES	Limited	Market development continuing with increasing domestic and export demand
<b>Granger</b> (b)	NO	NO	NO	Niche	Limited	Limited	Market development continuing with no current export demand
<b>La Trobe</b> (b)	Limited	YES	YES	YES	YES	YES	Stable market demand
<b>Scope CL</b> (b)	Limited	YES	YES	YES	NO	NO	Stable market demand

## RECEIVAL SITE MAP



## WA Malt and Food Barley Rationalisation Plan: Overview

CBH area	Port Zone	Malt segregations per CBH area	Bass	Baudin	Flinders	Granger	Hindmarsh	La Trobe	Scope CL	Total
Area 1	Geraldton	2	0	0	0	0	0	1	1	2
Area 2	Port	1	0	0	0	0	0	0	1	1
Area 3	Kwinana	2	0	0	0	0	0	1	1	2
Area 4		9	0	0	0	0	0	3	6	9
Area 5		6	0	0	0	0	0	3	3	6
Area 6		14	4	0	0	0	0	4	6	14
Area 7	Port	12	2	0	0	0	0	6	4	12
Area 8	Albany	12	1	0	1	0	0	6	4	12
Area 9		11	3	0	1	0	0	6	1	11
Area 10		7	1	0	3	0	0	3	0	7
Area 11	Esperance	2	0	0	1	0	0	1	0	2
Area 12		6	0	0	0	0	0	6	0	6
Port		5	0	0	0	0	0	5	0	5
Total		98	13	1	7	1	0	47	29	98

## WA Malt and Food Barley Segregations by Port Zone

### Summary Segregation

**Geraldton Port Zone - 2018/19 harvest**

CBH area	CBH site	Malt segregations per CBH area	Bass	Baudin	Flinders	Granger	Hindmarsh	La Trobe	Scope CL	Total
Area 1		2	0	0	0	0	0	1	1	2
Area 2		1	0	0	0	0	0	0	1	1
Port		2	0	0	0	0	0	1	1	2
Total	Geraldton PZ	5	0	0	0	0	0	2	3	5

### Summary Segregation

**Kwinana Port Zone - 2018/19 harvest**

CBH area	CBH site	Malt segregations per CBH area	Bass	Baudin	Flinders	Granger	Hindmarsh	La Trobe	Scope CL	Total
Area 3		4	1	0	0	0	0	1	2	4
Area 4		9	0	0	0	0	0	3	6	9
Area 5		6	0	0	0	0	0	3	3	6
Area 6		14	4	0	0	0	0	4	6	14
Area 7		12	2	0	0	0	0	6	4	12
Total	Kwinana PZ	45	7	0	0	0	0	17	21	45

### Summary Segregation

**Albany Port Zone - 2018/19 harvest**

CBH area	CBH site	Malt segregations per CBH area	Bass	Baudin	Flinders	Granger	Hindmarsh	La Trobe	Scope CL	Total
Area 8		12	1	0	1	0	0	6	4	12
Area 9		11	3	0	1	0	0	6	1	11
Area 10		7	1	0	3	0	0	3	0	7
Port	Albany / Mirrambeena	2	0	0	1	0	0	1	0	2
Total	Albany PZ	32	5	0	6	0	0	16	5	32

### Summary Segregation

**Esperance Port Zone - 2018/19 harvest**

CBH area	CBH site	Malt segregations per CBH area	Bass	Baudin	Flinders	Granger	Hindmarsh	La Trobe	Scope CL	Total
Area 11		6	0	0	0	0	0	6	0	6
Area 12		5	0	0	0	0	0	5	0	5
Port		5	1	1	1	1	0	1	0	5
Total	Esperance PZ	16	1	1	1	1	0	12	0	16

For detailed information please view the GIWA Western Australian Malt and Food Barley Variety Receival Recommendations for the 2018/2019 Harvest: <http://www.giwa.org.au/barley-council>

We are keen to hear your feedback about the pilot planning process, please contact:

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