2019/2020 Malt Barley Variety Rationalisation Plan Western Australia

V3 10th August 2018

Why design a Rationalisation Plan?

This barley variety rationalisation plan for the **2019/20 harvest** in Western Australia should be read in conjunction with the detailed document GIWA: Western Australian Malt Barley Variety Receival Recommendations for the 2019/20 Harvest:
http://www.giwa.org.au/barley-council

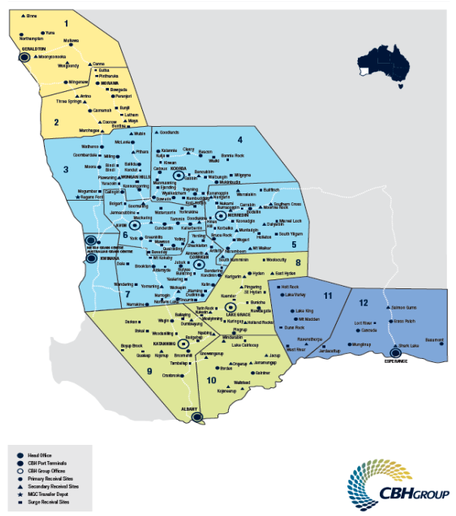
This rationalisation plan is a guide only - a planning tool for growers and industry. It was compiled by the GIWA Barley Council in conjuction with CBH Operations, maltsters and brewers after the public GIWA Barley Rationalisation meeting held in Perth in July 2018.

Feedback welcome during the 2018 spring pre-harvest meetings, and again in post harvest meetings in autumn 2019. ***SAVE THE DATE: 17th July 2019 GIWA Barley Rationalisation Meeting***

State Overview

CBH area	Port Zone	Malt segregations per CBH area	Bass	Baudin	Flinders	Granger	Hindmarsh	La Trobe	Scope CL	Spartacus CL	Total
Area 1	Geraldton	2	0	0	0	0	0	1	1	0	**2**
Area 2		2	0	0	0	0	0	0	1	1	**2**
Port		3	0	0	0	0	0	1	1	1	**3**
Area 3	Kwinana	6	1	0	0	0	0	2	1	2	**6**
Area 4		11	0	0	0	0	0	3	6	2	**11**
Area 5		7	0	0	0	0	0	1	3	3	**7**
Area 6		16	3	0	0	0	0	3	5	5	**16**
Area 7		12	2	0	0	0	0	4	4	2	**12**
MGC		6	1	1	1	0	0	1	1	1	**6**
Area 8	Albany	12	0	0	1	0	0	6	2	3	**12**
Area 9		13	2	0	1	0	0	6	1	3	**13**
Area 10		8	1	0	3	0	0	3	0	1	**8**
Port		3	1	0	1	0	0	1	0	0	**3**
Area 11	Esperance	7	0	0	0	0	0	6	0	1	**7**
Area 12		5	0	1	0	0	0	4	0	0	**5**
Port		4	0	1	1	0	0	1	0	1	**4**
Total		**117**	**11**	**3**	**8**	**0**	**0**	**43**	**26**	**26**	**117**

RECEIVAL SITE MAP



Western Australian Malt and Food Barley Variety Receival Recommendations for the 2019/2020 Harvest

- Bass, La Trobe and to a lesser extent Flinders will be the main malt barley varieties sought by the trade for malting and brewing end-use in China, south-east Asia and Japan.
- La Trobe is now the main malt barley variety sought for the manufacture of shochu in Japan and production of La Trobe is critical to maintain supply to this premium market. Whilst Spartacus CL is being assessed for the shochu market we would have to wait until after the 2019/20 harvest before any significant volumes of Spartacus CL would be purchased by that market (assuming it was deemed suitable in commercial trials conducted over the next 18 months).
- The decline in the planting of Scope CL coincides with a reduced demand from the international trade for its malt quality profile.
- There has been rapid grower adoption of Spartacus CL but production is likely to exceed market demand in the short term. International customers are not yet fully familiar with its malting and brewing profile or its relevance for shochu production.
- Baudin is in phase out mode as customers are comfortable with alternate varieties like Bass that can provide a similar quality profile for malting and brewing purposes. The 2019/20 harvest is likely to be the last harvest that segregations will be offered for Baudin in Western Australia.
- Segregation opportunities for Bass, Baudin, Flinders, La Trobe, Scope CL and Spartacus CL vary by port zone and within a port zone (Table 1).

Table 1. Western Australian malt and food barley industry variety recommendations by Port Zone for the 2019/20 harvest

YES	This is a recommended variety for this production zone.
Limited	Limited segregations likely due to low production hectares, limited market demand, a new variety going through market development or phasing out an old variety.
Niche	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.
NO	Variety has been phased out or marketers are not looking to accumulate this variety in this production zone.

Port Zone	Geraldton	Kwinana		Albany		Esperance	Comment
(~% of total barley area)	~5%	~40%		~30%		~25%	
		Western	Eastern	Northern	Southern		
Malting varieties							
Bass	NO	YES	NO	Limited	Limited	NO	Stable market demand with an excellent malt quality profile
Baudin	NO	NO	NO	NO	NO	Niche	Preferred variety with stable market demand but low production volume
Flinders	NO	Niche	NO	Limited	YES	Niche	Works well as a variety for post-malt blending and for sugar-adjunct brewing
La Trobe	NO	YES	YES	YES	YES	YES	Stable market demand with recognised quality profile
Scope CL	NO	Limited	Limited	Limited	NO	NO	Declining production and declining market demand
Spartacus CL	YES	YES	YES	YES	YES	YES	Market development for brewing and shochu end use continuing

Note: Banks and RGT Planet are still undergoing malting and brewing accreditation so not included in the current 2019/20 recommendations.

Geraldton 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	Spartacus CL	Total
Area 1		2	0	0	0	0	0	1	1	0	**2**
Area 2		2	0	0	0	0	0	0	1	1	**2**
Port		3	0	0	0	0	0	1	1	1	**3**
Total	**Geraldton PZ**	**7**	**0**	**0**	**0**	**0**	**0**	**2**	**3**	**2**	**7**

Kwinana Port Zone 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	Spartacus CL	Total
Area 3		6	1	0	0	0	0	2	1	2	**6**
Area 4		11	0	0	0	0	0	3	6	2	**11**
Area 5		7	0	0	0	0	0	1	3	3	**7**
Area 6		16	3	0	0	0	0	3	5	5	**16**
Area 7		12	2	0	0	0	0	4	4	2	**12**
MGC		6	1	1	1	0	0	1	1	1	**6**
Total	**Kwinana PZ**	**58**	**7**	**1**	**1**	**0**	**0**	**14**	**20**		**58**

Albany Port Zone 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	Spartacus CL	Total
Area 8		12	0	0	1	0	0	6	2	3	**12**
Area 9		13	2	0	1	0	0	6	1	3	**13**
Area 10		8	1	0	3	0	0	3	0	1	**8**
Port	Albany / Mirrambeen	3	1	0	1	0	0	1	0	0	**3**
Total	**Albany PZ**	**36**	**4**	**0**	**6**	**0**	**0**	**16**	**3**	**7**	**36**

Esperance Port Zone 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	Spartacus CL	Total
Area 11		7	0	0	0	0	0	6	0	1	**7**
Area 12		5	0	1	0	0	0	4	0	0	**5**
Port		4	0	1	1	0	0	1	0	1	**4**
Total	**Esperance PZ**	**16**	**0**	**2**	**1**	**0**	**0**	**11**	**0**	**2**	**16**

Geraldton Area Detailed Segregation

Geraldton Port Zone - 2018/19 harvest

Location and segregations			Variety								
CBH area	CBH site	Malt segregations per CBH site	Bass	Baudin	Flinders	Granger	Hindmarsh	La Trobe	Scope CL	Spartacus CL	Total
Area 1	Mingenew	2	0	0	0	0	0	1	1	0	**2**
Area 2	Carnamah	2	0	0	0	0	0	0	1	1	**2**
Port	Port	3	0	0	0	0	0	1	1	1	**3**
Total	**Geraldton PZ**	**7**	**0**	**0**	**0**	**0**	**0**	**2**	**3**	**2**	**7**

Kwinana Area Detailed Segregation

PLANNING SEGREGATIONS ALLOCATED TO AREAS NOT BINS

Kwinana Port Zone - 2018/19 Harvest

Location and segregations			Variety								
CBH area	CBH site	Malt segregations per CBH site	Bass	Baudin	Flinders	Granger	Hindmarsh	La Trobe	Scope CL	Spartacus CL	Total
Area 3	Moora	6	1					2	1	2	**6**
Area 3	Pithara	0									**0**
Area 3	RegansFord	0									**0**
Area 4	Dowerin	11						3	6	2	**11**
Area 4	Kalanie	0									**0**
Area 4	Cadoux	0									**0**
Area 4	Traying	0									**0**
Area 4	Wyalkatchem	0									**0**
Area 4	Koorda	0									**0**
Area 4	Mukinbudin	0									**0**
Area 5	Merredin	7						1	3	3	**7**
Area 5	Narembeen	0									**0**
Area 5	Bruce Rock	0									**0**
Area 5	Moorine Rock	0									**0**
Area 6	Kellerberin	16	3					3	5	5	**16**
Area 6	Tammin	0									**0**
Area 6	Cunderdin	0									**0**
Area 6	Meckering	0									**0**
Area 6	Avon	0									**0**
Area 6	Calingiri	0									**0**
Area 6	Quairading	0									**0**
Area 6	York	0									**0**
Area 7	Dale	12	2					4	4	2	**12**
Area 7	Brookton	0									**0**
Area 7	Bulyee	0									**0**
Area 7	Corrigin	0									**0**
Area 7	Kondinin	0									**0**
Area 7	Kulin	0									**0**
Area 7	Wickepin	0									**0**
Area 7	Normans Lake	0									**0**
Area 7	Narrakine	0									**0**
Area 7	Mt Kokeby	0									**0**
Area 7	Ainsworth	0									**0**
Area 7	Yearlering	0									**0**
Area 7	Aldersyde	0									**0**
MGC		6	1	1	1			1	1	1	**6**
Total	**Kwinana PZ**	**58**	**7**	**1**	**1**	**0**	**0**	**14**	**20**	**15**	**58**

Albany Area Detailed Segregation

PLANNING SEGREGATIONS ALLOCATED TO AREAS NOT BINS

Albany Port Zone - 2018/19 harvest

Location and segregations			Variety								
CBH area	CBH site	Malt segregations per CBH site	Bass	Baudin	Flinders	Granger	Hindmarsh	La Trobe	Scope CL	Spartacus CL	Total
Area 8	Hyden	12			1			6	2	3	**12**
Area 8	Pingaring	0									**0**
Area 8	Karlgarin	0									**0**
Area 8	Lake Grace	0									**0**
Area 8	Newdegate	0									**0**
Area 8	Pingrup	0									**0**
Area 8	Kukerin	0									**0**
Area 9	Nyabing	13	2		1			6	1	3	**13**
Area 9	Dumbleyung	0									**0**
Area 9	Wagin	0									**0**
Area 9	Woodanilling	0									**0**
Area 9	Broomehill	0									**0**
Area 9	Kojonup	0									**0**
Area 9	Darakin	0									**0**
Area 9	Bokal	0									**0**
Area 9	Boyup Brook	0									**0**
Area 9	Cranbrook	0									**0**
Area 10	Borden	8	1		3			3		1	**8**
Area 10	Jacup	0									**0**
Area 10	Gairdner	0									**0**
Area 10	Gnowangerup	0									**0**
Area 10	Kojaneerup	0									**0**
Area 10	Ongerup	0									**0**
Area 10	Mindarabin	0									**0**
Area 10	Wellstead	0									**0**
Port	Albany / Mirrambeen	3	1		1			1			**3**
Total	**Albany PZ**	**36**	**4**	**0**	**6**	**0**	**0**	**16**	**3**	**7**	**36**

Esperance Area Detailed Segregation

PLANNING SEGREGATIONS ALLOCATED TO AREAS NOT BINS

Esperance Port Zone - 2018/19 harvest

Location and segregations			Variety								
CBH area	CBH site	Malt segregations per CBH site	Bass	Baudin	Flinders	Granger	Hindmarsh	La Trobe	Scope CL	Spartacus CL	Total
Area 11	Lake King	7						6		1	**7**
Area 11	Mt Madden	0									**0**
Area 11	Ravensthorpe	0									**0**
Area 11	West River	0									**0**
Area 11	Dunn Rock	0									**0**
Area 11	Lake Varley	0									**0**
Area 12	Beaumont	5		1				4			**5**
Area 12	Cascades	0									**0**
Area 12	Grass Patch	0									**0**
Area 12	Mungilinup	0									**0**
Port	Esperance Port	4	0	1	1	0	0	1	0	1	**4**
Total	**Esperance PZ**	**16**	**0**	**2**	**1**	**0**	**0**	**11**	**0**	**2**	**16**

For detailed information please view the GIWA Western Australian Malt and Food Barley Variety Receival Recommendations for the 2019/2020 Harvest: **http://www.giwa.org.au/barley-council**

Further information:

Will Piercey
Country Quality Manager
CBH Group
0429 109 604
william.piercey@cbh.com.au

Lyndon Mickel
Chair
GIWA Barley Council
0427 766 029
lmickel@bigpond.com

Larissa Taylor
Chief Executive Officer
Grain Industry Association of WA (GIWA)
0413 076 665
ltaylor@giwa.org.au