

CREATING AND
RETURNING VALUE
TO GROWERS

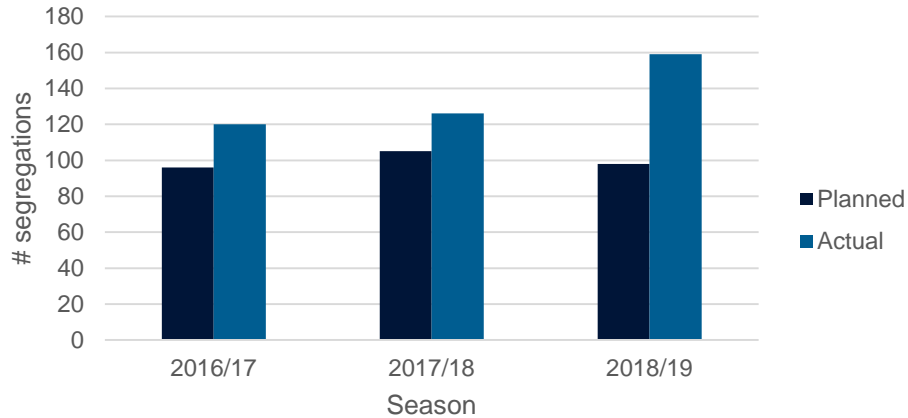
GIWA BARLEY RATIONALISATION 2019



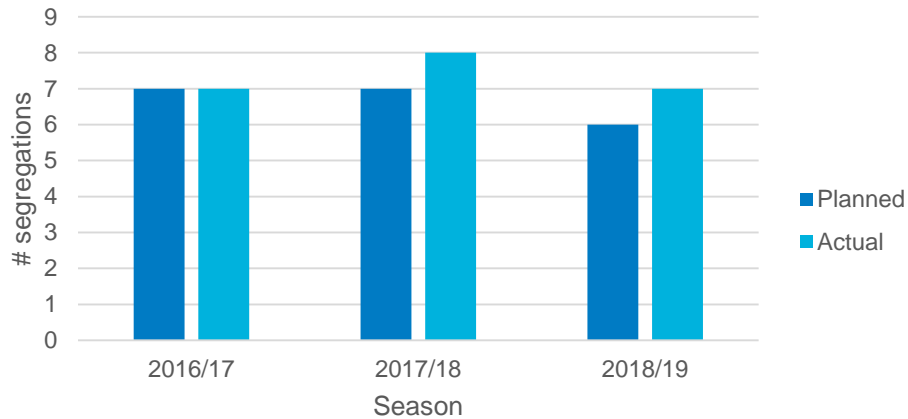
HISTORY SINCE THE START OF BARLEY RATIONALISATION



Planned vs. Actual Malt and Food Grade Barley Segregations 2016-2018



Planned vs. Actual Malt and Food Grade Barley Services Offered 2016-18



VARIETIES RECEIVED INTO CBH SUPPLY CHAIN



2016/17	2017/18	2018/19
Bass	Bass	Bass
Baudin	Baudin	Baudin
Flinders	Flinders	Flinders
Granger	Granger	La Trobe
La Trobe	La Trobe	RGT Planet
Scope CL	Scope CL	Scope CL
Hindmarsh	Spartacus CL	Spartacus CL
	Hindmarsh	

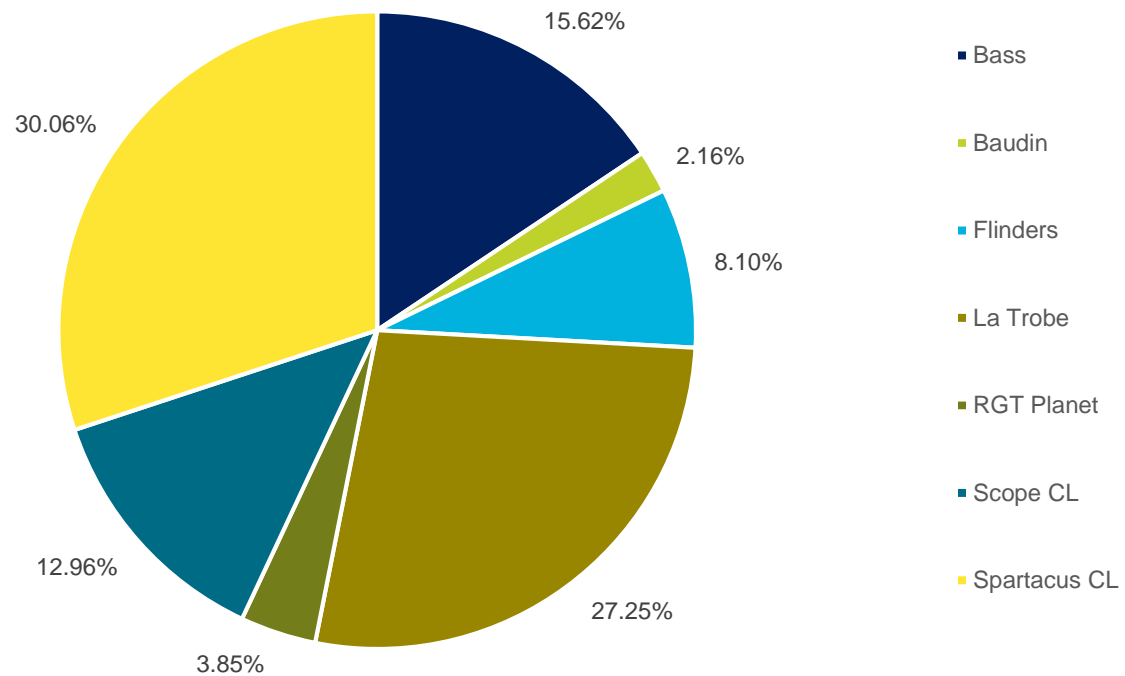
- Variety was not classed as malt/food after the year listed
- Variety was added as malt/food that year

WHAT DO WE SEE HERE?



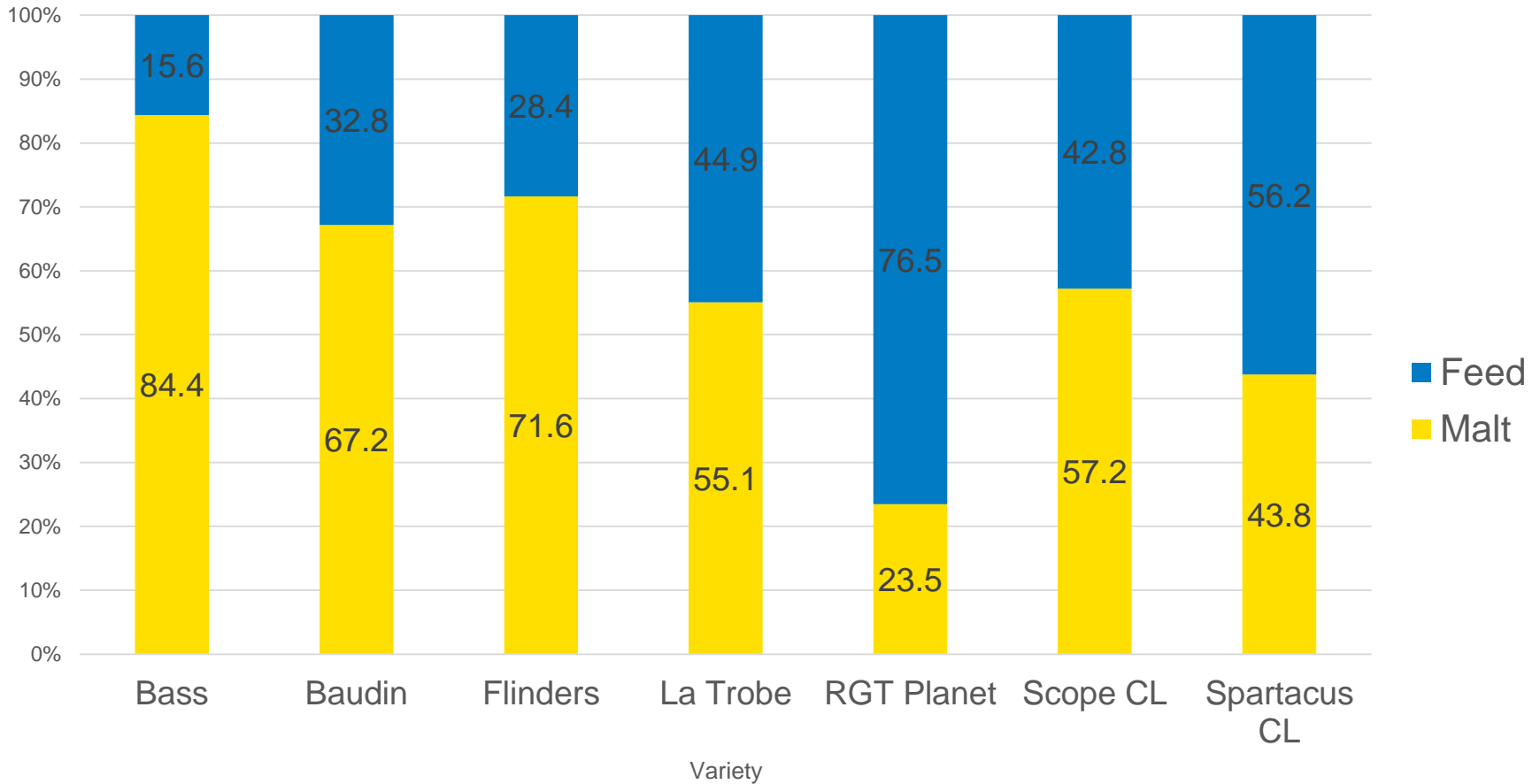
- Seasonal variance last year was a second largest on record.
- Varieties are being accredited and adopted faster than older varieties are being dropped out of the system.
- The CBH network is changing as more services are being centralised into less sites.
- Open communication between various areas of the barley industry is healthy.

% Malt/Food grade barley received by CBH by variety 2018/2019



PERCENTAGE MAKING MALT/FOOD GRADE

% Malt/Food grade achieved for Malt varieties 2018/19



What does CBH see to be the best way going forward.

- For the supply chain to have a malting barley segregation plan spanning 2 years out.
- Current 12 months to be a fine tuning of the agreed segregation plan with site plans becoming more solid as harvest approaches.
- While the subsequent harvest is a fluid estimate which gives growers the ability to have an indicative harvest plan 12 months ahead.
- Consider developments to the current estimate system to allow for more than one seasons estimates to be used.

BARLEY RATIONALISATION

- **Planet and Spartacus (accredited March 2019)**
 - Depends on the market demand and the market development progress. Discussion today will help inform the plan for these varieties.
 - Percentage uptake is increasing for Spartacus and Planet from last year based on the estimates we have so far.

- **Banks, if accredited by MBIBTC in September 2019**
 - Like Planet, market demand and market development will inform any segregation planning. Malting accreditation does not mean segregations will be available. What are the markets thinking?

- We know that these IMI varieties will be the majority of the barley crop.
 - As advised by CBH our paddock planner estimates and declaration of use of IMI chemistry will inform our decision on whether to segregate or not.
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- Looking at all scenarios
 - Planning for all different cases
 - Waiting for the data to decide which direction to go.