GIWA BARLEY COUNCIL

September 2025

Western Australian malt barley variety receival recommendations for the 2026–27 harvest

Summary

Global barley market overview

Global barley market dynamics remain essentially unchanged from the previous year. China continues to dominate as the world's largest barley importer, accounting for nearly half of global imports in 2023–24. Australia plays a significant role in the malt barley trade, contributing around 30-40% of the global supply. China is also Australia's largest export destination, particularly for Fair Average Quality (FAQ) barley.

Meanwhile, Saudi Arabia has significantly reduced its presence in the global barley trade and is no longer a major player. This shift underscores the growing importance of emerging markets and the need for Australia to diversify its export strategy.

Emerging and niche markets

Africa and Latin America are showing strong demand for premium single-variety malt barley, with countries like Mexico, Peru, and Ecuador exclusively purchasing single-variety MALT1 grade barley, avoiding FAQ and feed grades entirely. Chile and Brazil have expressed interest in importing WA malt barley grain, but access constraints currently limit trade. As a result, Brazilian brewers are importing processed Australian malt instead.

These emerging and niche markets play a crucial role in maintaining the price spread between malt and feed barley. Without their demand, the gap would narrow further, putting additional pressure on profitability for WA growers and exporters.

South East Asia and Japan

There is sustained demand for barley that can be malted without the use of processing aids, particularly from premium beer producers like Heineken in South East Asia and brewers in Japan. These markets are strategically important for domestic malt processors in WA, as they offer opportunities for value-added exports and long-term partnerships. However, meeting this demand is challenging due to limited varietal diversity, especially since Maximus CL, the dominant variety, is not preferred for this brewing segment. Expanding the range of suitable varieties will be essential to better serve these premium markets.

Market challenges

Despite emerging markets and trends toward premiumisation, malt premiums remain subdued. This is primarily due to declining beer consumption in mature markets traditionally served by Australian barley and malt. In China, beer production has peaked and is now in decline, although demand for premium beer is rising, which is increasing the need for high-quality malt barley in brewing.

Chinese malt exports are expanding, driven by lower domestic consumption and significantly reduced labour and energy costs, making Chinese malt more competitively priced than Australian malt. This shift is placing pressure on Australian malt houses, leading to reduced production levels and tighter business conditions. A substantial portion of Chinese malt is produced using FAQ barley sourced from WA. This includes out-of-spec Maximus CL barley that fails to meet MALT1 standards upon delivery, as well as other malt barley varieties that are binned into feed segregations (often due to the absence of a segregation option for the variety they planted near their growing location).

Variety constraints and opportunities

In 2024, WA growers delivered 32 different barley varieties, but only 13 of these were planted on more than 10,000 hectares in at least one port zone. Of those, six varieties reached that scale in two port zones, three in three zones, and just one, Maximus CL, was planted across all four port zones. Maximus CL dominated barley plantings, accounting for two-thirds of the total area, which led to 80% of the MALT1 bulk handling stacks within the CBH network being allocated to this variety.

In 2025, the dominance of Maximus CL has slightly declined as growers begin exploring alternative varieties. Despite this shift, the limited diversity in segregated varieties and the low availability of malting-suitable barley that doesn't require processing aids are constraining global demand for WA malt barley grain and malt.

Summary (cont'd)

The 2026–27 season represents a critical juncture for WA's malting barley industry, offering a chance to diversify the supply chain and better align with shifting market demands. However, persistently low malt premiums are influencing grower decisions, particularly in the Esperance port zone, where many are opting to plant feed-only barley varieties or prioritising volume over quality in malt barley production. In seasons with favourable growing conditions, some of this barley may meet MALT1 specifications and is then delivered to the nearest cost-effective MALT1 stack for the planted variety. This approach reflects a pragmatic response to market pressures but underscores the need for strategic adjustments to maintain WA's competitiveness in premium malt markets.

WA has traditionally focused on exporting medium-to-high fermentability barley varieties, such as Baudin, Bass, Flinders, Maximus CL, RGT Planet, and Spartacus CL, which align with the preferences of key international malt markets. Recently accredited varieties, Cyclops, Laperouse, and Neo CL, also meet this fermentability profile and are slated for commercial evaluation for their market suitability following the 2025–26 harvest. These varieties will reach sufficient on-farm production levels in 2026 to support segregation within the Bunge and CBH bulk handling systems. However, only Cyclops has been trialled at an industrial malting scale in WA, marking a key area for future development and market testing from the 2025–26 harvest. The adoption of Cyclops, Laperouse, and Neo CL could support market diversification, but segregation remains limited, and market acceptance is still in development.

Commodus CL, a medium fermentability variety considered in 2025, will not be segregated in 2026–27 due to limited market interest, despite ongoing market development in eastern Australia. Similarly, Spartacus CL has been removed from the segregable list due to insufficient supply, and Buff has been excluded because of a lack of domestic malting and market demand, despite its potential for malt production without the use of processing aids. Buff's future may be further constrained by the release of Kirwan CL, the new imidazolinone-tolerant feed barley suited to acid soils.

For the domestic market, niche storage solutions such as on-farm and small-scale bulk handling facilities may still support the procurement of key varieties like RGT Planet. However, general segregation will not be offered through Bunge or CBH systems.

Segregation opportunities for Cyclops, Laperouse, Maximus CL, and Neo CL will vary by port zone and within zones such as Kwinana and Albany, as outlined in Table 1.

Table 1. Western Australian malt barley variety segregation recommendations by port zone for the 2026–27 harvest

YES	Recommended variety for this production zone. Segregations will be preferentially allocated to this variety.
Limited	Limited segregation is likely due to low production hectares, limited market demand, a new variety undergoing market development, or phasing out an old variety.
Niche	Available only if a marketer or grain accumulator has sufficient tonnage to supply a customer. Requires negotiation with the bulk handler (e.g., CBH) or on-farm storage and coordination with marketers. Growers should consult their preferred marketer to determine 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
		North (Midlands)	South	North (East)	North	South		
Malting varieties								
Cyclops (b)	**NO**	**NO**	**NO**	**NO**	Limited	Limited	Limited	Production volumes support limited segregation. Proactive market development is required for building international demand.
Laperouse (b)	**NO**	**NO**	Limited	**NO**	Limited	Limited	**NO**	Production volumes support limited segregation. Proactive market development is required to develop international demand.
Maximus CL (b)	**NO**	**YES**	**YES**	**YES**	**YES**	**YES**	**YES**	The leading variety across all port zones, offering reliable quality for most non-Japanese export markets. Optimal malt quality is achieved with the application of gibberellic acid.
Neo CL (b)	**NO**	**NO**	Limited	**NO**	**YES**	**YES**	**YES**	Grower adoption is strong, and while international market awareness exists, formal acceptance has yet to be achieved.
RGT Planet (b)	**NO**	**NO**	Niche	**NO**	**NO**	**NO**	**NO**	Due to limited production, segregation in bulk handling is not feasible. Contracting will be necessary for supply, particularly in markets that favour malt made without gibberellic acid treatment.

Introduction

Why rationalise malt varieties?

The WA barley industry supports a long-term strategy of segregating up to two malt barley varieties per port zone, occasionally three, while limiting segregation for minor, new, or niche malt varieties. This approach is designed to improve logistical efficiency by reducing storage and handling costs, simplifying bin-level segregation planning, and encouraging stronger trader demand by avoiding small, unsaleable parcels of grain.

At the same time, maintaining a spread of malt varieties with differing agronomic and malting characteristics is essential. This diversity enables processors to blend malt according to specific customer requirements and helps growers manage agronomic risks across varying environments. It is essential to be aware that chemical treatments applied to malt barley crops can impact market access, as not all export markets have the same import tolerances as those in Australia. For instance, opportunistic markets, such as Europe, currently do not accept barley with imazapyr residue or detectable levels of diquat herbicide. Should these markets become regular buyers, specific segregation protocols may be required to meet their standards.

These recommendations have been developed by the Grain Industry Association of Western Australia (GIWA) through its Barley Council, in consultation with stakeholders across the WA barley supply chain. They are intended to guide growers and consultants in planning for the 2026 barley cropping season. A review of the plan will take place in autumn 2026, with any changes in market demand communicated to growers. It's important to note that WA's recommendations may differ from those in eastern Australia, reflecting WA's strong focus on international markets.

Barley rationalisation process

Three barley varieties, AGT-Spirit, Spinnaker, and Titan AX, currently in Stage Two of the Grains Australia Malt Accreditation Program, are not included in the 2026–27 variety receival recommendation plan. A decision regarding their malt accreditation is expected in February or March 2026. For more details, growers and consultants can refer to the 'Varieties Undergoing Malting and Brewing Accreditation' section on the Grains Australia website (grainsaustralia.com.au).

It's important to note that malt accreditation does not guarantee segregation opportunities at receival sites, nor does it ensure that international markets will pay a premium or that brewing customers will demand the variety. Additionally, accreditation does not imply agronomic suitability for different growing environments across WA.

While GIWA publishes industry recommendations on suitable malt varieties to grow, it does not control segregation options at receival sites. Some sites may offer only one malt barley segregation, while others may support multiple. Growers are strongly encouraged to submit data on area planted and attend bulk handlers' pre-harvest meetings to support effective segregation planning.

The Australian barley industry is committed to maintaining the integrity and quality of malt barley delivered to end users. Co-binning of segregated malt varieties is currently not supported, even if varieties share similar agronomic traits. Intentional contamination of malt barley stacks with other varieties is prohibited. Correct variety declaration is a legal requirement under the Plant Breeders Rights Act, and misdeclaration breaches the *Bulk Handling Act 1967*. Growers should take care to avoid mixing visually similar varieties (e.g., La Trobe, Maximus CL, Spartacus CL) or combining them with other types.

To facilitate accurate varietal identification, machine learning technology is being gradually introduced at bulk-handling receival sites.

When delivering malt barley grain, growers should target malt barley grain between 10.3–10.8% protein for domestic sales and 10.5–11.0% for export sales (even though the receival window is 9.5–12.8%) with a minimum of 80% retention on a 2.5 mm sieve, a hectolitre weight above 64 kg/hL with ryegrass ergot less than 3 cm, no whole snails and no glyphosate use near harvest (i.e. as a desiccant).

Introduction (cont'd)

Variety specific recommendations

The release and adoption of new malt barley varieties is occurring more rapidly than the phase-out of older varieties. This high turnover presents challenges for end users, who often prefer long-term supply and familiarity to optimise their brewing processes. Additionally, each new malt segregation increases storage and handling complexity and cost for bulk handlers.

To address these challenges, the GIWA Barley Variety Rationalisation Plan aims to balance two key priorities: enabling growers to access new, high-performing malt varieties, and ensuring customers have consistent access to large, uniform parcels of the same variety over a minimum five-year period. This approach supports both agronomic innovation and market stability.

Each malt barley variety grown in WA has distinct malting characteristics, and brewers base their purchasing decisions on a combination of factors, including variety availability, familiarity, consistency, price, beer style requirements, and the type and level of adjuncts used in brewing recipes.

This document outlines proposed segregation opportunities by port zone (see Table 1), market usage and demand by industry sector (see Table 2), and variety-specific commentary to support grower decision-making.

Growers are encouraged to use the market signals provided in this document to inform their malt barley variety choices for the 2026 season. Key considerations include:

- Market demand and pricing signals.
- Segregation availability by location.
- Agronomic suitability and management requirements.
- Risk associated with achieving malt-grade specifications.

Varieties classified as PREFERRED are more likely to attract higher premiums than those listed as ACCEPTABLE. However, it is important to note that these recommendations are indicative only. Final segregation arrangements for the 2026–27 harvest may differ from those proposed in this document.

Growers should maintain regular communication with their bulk handlers to confirm segregation plans and ensure alignment with market opportunities.

Table 2. Market acceptance and trends in market demand of accredited malt barley varieties grown in Western Australia for the 2026–27 harvest

PREFERRED	**Variety selection is a key driver for buyer preference. A PREFERRED variety is significantly more likely to attract a higher malt premium compared to an ACCEPTABLE variety.**
ACCEPTABLE	**An ACCEPTABLE variety is typically purchased as an alternative when a PREFERRED variety is unavailable.**
Being assessed	This variety is currently undergoing development in both domestic and international markets. However, this process does not guarantee future market demand or premium pricing opportunities.
No demand	There is currently no buyer demand for this variety within this market segment. As a result, it is unlikely to attract a malt premium or be accepted into existing segregation plans.

Market type (market size)	Export as grain (> 500,000 t)	Export as malt (300,000 t)	Shochu (160,000 t)
Cyclops (b)	Being assessed	Being assessed	Being assessed
Laperouse (b)	Being assessed	Being assessed	Being assessed
Maximus CL (b)	ACCEPTABLE (stable)	ACCEPTABLE (stable)	**PREFERRED (stable)**
Neo CL (b)	Being assessed	ACCEPTABLE (increasing)	Being assessed
RGT Planet (b)	No demand	**PREFERRED (declining)**	No demand

*Note: **Market size** – The volumes shown in brackets represent potential market size only. These figures can vary significantly from year to year and are intended to illustrate relative differences in market demand. They should be interpreted as indicative rather than predictive and may influence demand for specific varieties and vary by port zone.*

Variety specific recommendations

Accredited malt varieties

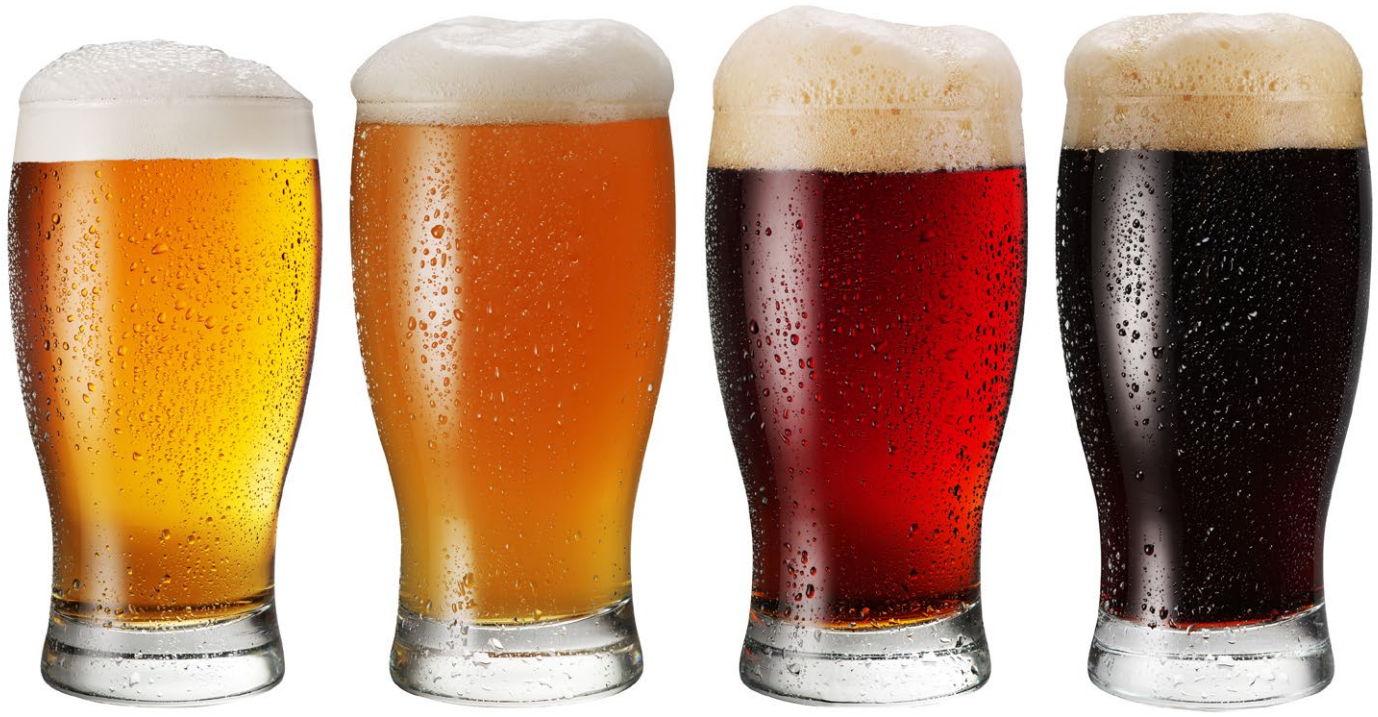
The malt barley recommendations for the 2026 season are as follows:

Cyclops (b)

- Cyclops is being assessed for multiple export opportunities, including grain, malt, and shochu production (in Japan).
- Grains Australia has identified Cyclops as a variety with a high fermentability profile.
- The Grains Australia Malt Performance Summary for Cyclops is available here: grainsaustralia.com.au/master-lists/malting-variety-list#barley-master-list/malt-performance-summaries/. It presents early commercial malt data and serves as a reference for industry stakeholders, highlighting Cyclops's anticipated quality traits.
- Breeder's data suggests Cyclops has comparable grain and end-use quality to Spartacus CL, with the added benefit of lower wort β-glucan, which may enhance brewing performance (e.g., filtration efficiency and beer clarity).
- Cyclops has been malted at an industrial scale in WA (two batches in 2023). However, its commercial malting performance, both domestically and internationally, remains to be evaluated.
- Target production zones in 2026 include limited segregations in the Albany and Esperance port zones.

Laperouse (b)

- Laperouse is being assessed for multiple export opportunities, including grain, malt, and shochu production (in Japan).
- Grains Australia has identified Laperouse as a variety with a medium to high fermentability profile, making it suitable for a range of brewing applications.
- The Grains Australia Malt Performance Summary for Laperouse is available here: grainsaustralia.com.au/master-lists/malting-variety-list#barley-master-list/malt-performance-summaries/. It presents early commercial malt data and serves as a reference for industry stakeholders, highlighting Laperouse's anticipated quality traits.
- Breeder's data demonstrates that Laperouse has a grain quality comparable to Maximus CL, while offering a distinct malt profile that enhances the diversity of Australian barley and malt options. To optimise malting performance, Laperouse benefits from the application of gibberellic acid and its low wort β-glucan levels support enhanced filtration efficiency and beer clarity.
- Laperouse has not yet been malted at an industrial scale in WA.
- Heineken has recognised Laperouse by including it in their 'Yellow' variety list, indicating potential suitability for some of their brewing specifications. Further engagement is underway to elevate Laperouse to Heineken's 'Green' list. If successful, this would make it a preferred variety for Heineken's brewing operations.
- Target production zones in 2026 include limited segregations in the Kwinana South and Albany port zones.



Variety specific recommendations (cont'd)

Maximus CL (b)

- Maximus CL is acceptable for export as both grain and malt and is preferred for shochu production in Japan.
- Grains Australia has identified Maximus CL as a variety with a high fermentability profile, making it well-suited to starch-adjunct brewing.
- Maximus CL malt delivers high extract and enzyme potential but requires the application of gibberellic acid to achieve suitable modification.
- The variety is approved by brewing customers outside Japan, with strong market acceptance in Latin America.
- Maximus CL is the dominant variety in all WA port zones.
- Growers should use recommended imidazolinone herbicides and remain aware of market advice regarding grain delivery from paddocks treated with these herbicides.
- Target production zones in 2026 include Kwinana, Albany and Esperance port zones.

Neo CL (b)

- Neo CL is being assessed for multiple export opportunities, including grain, malt, and shochu production in Japan.
- Grains Australia has identified Neo CL as a variety with a high fermentability profile, making it suitable for a range of brewing applications.
- Breeder's data indicates that Neo CL has improved grain retention relative to RGT Planet, along with an enhanced malt profile. While the need for gibberellic acid during its malting process remains unknown, micro-malt trials indicate that Neo CL malt delivers improved proteolytic activity and lower wort turbidity compared to RGT Planet malt.
- Neo CL has not yet been malted at an industrial scale in WA.
- Heineken has recognised Neo CL by including it in their 'Yellow' variety list, indicating potential suitability for some of their brewing specifications.
- Growers should use recommended imidazolinone herbicides and remain aware of market advice regarding grain delivery from paddocks treated with these herbicides.
- Target production zones in 2026 include the Albany and Esperance port zones, with limited segregation in the Kwinana South area.

RGT Planet (b)

- RGT Planet is preferred for export as malt, primarily due to its ability to be consistently malted without the use of gibberellic acid, offering processing efficiency for maltsters.
- Grains Australia has identified RGT Planet as a variety with a high fermentability profile.
- RGT Planet malt has excellent extract with moderate enzyme potential, making it well-suited for both sugar- and starch-based adjunct brewing.
- There is currently an insufficient supply of MALT1 grade RGT Planet to meet demand. This may result in premiums above Maximus CL should the trade wish to accumulate RGT Planet through niche segregations with bulk handlers or on-farm storage.
- Target production zones in 2026 are niche or on-farm segregations in the Kwinana South port zone.

Variety specific recommendations (cont'd)

Varieties undergoing malting and brewing accreditation

The Grains Australia Barley Council is responsible for the Malting Barley Accreditation Framework. The Malting and Brewing Industry Barley Technical Committee (MBIBTC), an independent Grains Australia Barley Council subcommittee, evaluates barley submissions. Varieties accredited as malt barley follow established evaluation and testing procedures associated with the MBIBTC, Pilot Malting Australia (PMA) and Pilot Brewing Australia (PBA). The outcome of varieties under malt accreditation can be found at this link: **grainsaustralia.com.au/classification/barley**. Not all the varieties listed have an agronomic or market fit in WA.

Varieties in Stage One (target accreditation date is March 2028) include:

- Rocket CL (tested as IGB22023T, breeder – InterGrain), and
- Soldier CL (tested as IGB22117T, breeder – InterGrain).

Varieties in Stage One (target accreditation date is March 2027) include:

- AGT-Bunyip IA (tested as AGTB0530, breeder – AGT), and
- RGT-Atlantis (tested as RP22054 (P-52), breeder – RAGT).

Varieties in Stage Two (target accreditation date is March 2026) include:

- AGT-Spirit (tested as AGTB0318, breeder – AGT),
- Spinnaker (tested as SCA21-Y003, breeder – SECOBRA Recherches), and
- Titan AX (tested as AGTB0325, breeder – AGT).

Titan AX is currently in commercial production in WA, contributing to the region's continuing interest in herbicide-tolerant barley systems. In contrast, Spinnaker is not yet in commercial production, with only a production crop established in the south-west in 2025. AGT-Spirit is not being commercialised in WA at all, due to limited market alignment for this variety.

If accredited, the future of Titan AX as a deliverable malt variety in WA remains uncertain. Industry reports suggest Titan AX shares a medium fermentability profile with Commodus CL, a trait that has limited market appeal in WA's export markets for both grain and malt. The lack of strong market pull for Commodus CL led to its removal from segregation plans for the 2026–27 harvest. A similar outcome may apply to Titan AX if it becomes accredited, depending on buyer interest and export demand. As a feed barley, however, the CoAxium® technology found in Titan AX (and PegasusAX) is favoured in some farming systems.

Industry reports indicate that Spinnaker has a malt profile that is very similar to RGT Planet and may be suitable for malting without the use of gibberellic acid. If accredited, the malt quality profile of Spinnaker may therefore be desirable to domestic processors, who meet demand from Heineken and Japanese brewers seeking malt produced without the use of processing aids. Spinnaker is also being assessed for the shochu market in Japan.

In the WA GRDC-funded NVT series (2023–24), Spinnaker demonstrated grain yields and hectolitre weights equivalent to RGT Planet, with a moderate improvement in retention. It also shows slightly improved resistance to net-form net blotch and spot-form net blotch compared to RGT Planet, two diseases that contributed to the decline in RGT Planet's production but are also risks for Spinnaker. Compared to Maximus CL, though, Spinnaker had lower grain yield, hectolitre weight, and retention in the NVT series. However, across 10 DPIRD agronomy trials (2023–24) in the Kwinana port zone, Spinnaker showed comparable yields to Maximus CL, with a hectolitre weight slightly better than RGT Planet but not as good as Maximus CL, and retention midway between Maximus CL and RGT Planet, in response to nitrogen rates ranging from 10 to 150 kg nitrogen per hectare. These results suggest Spinnaker may be a viable option for domestic malt supply, particularly in the western regions of the Kwinana port zone, if its quality profile meets processor requirements and a premium is offered to support its production.

Entry into the Grains Australia Malt Accreditation Program does not guarantee that a variety will be accredited for malting and brewing, nor does it ensure acceptance by international customers for either grain or malt. GIWA advises caution when considering the adoption of varieties still under accreditation. Growers should avoid sowing large areas of such varieties unless there is a clear agronomic or grain yield advantage for use as feed barley, as future segregation opportunities remain uncertain.

For detailed information on varieties under assessment, growers are encouraged to consult the relevant breeder or seed licensee to understand their agronomic characteristics, potential market fit, and seed availability. Unless a new malt variety outperforms established varieties in both agronomic and processing performance, the trade is unlikely to support its international promotion. Any variety not listed in the recommendation tables or not contracted into a niche segregation will be stored and marketed as feed.

Port zone recommendations

Geraldton port zone

Market opportunity – export as grain.

Target varieties – no malt segregations are targeted for this port zone.

Detail

Grain delivered in the Geraldton port zone is exported as grain.

Median barley ha (GIWA July estimates 2015–2025) – 90,000 ha or 6% of the state's barley ha.

In 2024, the top five barley varieties in the Geraldton port zone accounted for 85% of the barley area. In decreasing popularity, they were Maximus CL, Spartacus CL, Litmus, Scope CL, and Yagan. Maximus CL was the most dominant, nearly three times as prevalent as Spartacus CL, and together these two varieties made up over half of the barley area. Imidazolinone-tolerant varieties (Maximus CL, Spartacus CL, Scope CL, and Commodus CL) occupied 69%, and acid-tolerant varieties (Litmus and Buff) occupied 18% of the barley area.

Due to the low production base in the region, the barley industry has decided not to recommend a malt barley segregation for the 2026–27 harvest. Maximus CL is the only malt variety grown in sufficient volumes to justify such segregation. Growers interested in pursuing malt premiums are advised to either build relationships with domestic processors or deliver MALT1 grain to upcountry receival points in the Kwinana North (Midlands) port zone.

Looking ahead to 2026, consultant feedback suggests that Maximus CL will likely remain the dominant barley variety in the Geraldton port zone, while Spartacus CL is expected to be phased out this year or the following year. Scope CL and Yagan continue to be important options for many growers, maintaining their relevance in the region. In addition to these mainstays, alternative planting strategies are being considered to suit specific agronomic conditions.

Neo CL, a longer-season malt variety, is being considered for early planting opportunities with a feed-barley agronomic package. Beast, a feed-only variety, is well-suited to areas with lower rainfall and offers a reliable option for growers in more challenging environments. Kirwan CL, a new imidazolinone and acid-tolerant feed barley, is expected to be particularly useful on acid sands. Until Kirwan CL becomes more widely adopted, Buff and Litmus will continue to play a key role on acid soils in the port zone.

Kwinana port zone

Market opportunity – export as grain, malt and shochu.

Target varieties – Maximus CL, with limited segregations for Laperouse and Neo CL in Kwinana South, and possibly (but unlikely) a niche segregation for RGT Planet in Kwinana South.

Detail

The Kwinana port zone plays a central role in WA's value-added barley supply chain. The bulk of the grain delivered in the Kwinana port zone is shipped as grain for shochu production in Japan or converted into malt in Perth and exported as malt. Only a small proportion of the grain received is exported as grain to Africa, Southeast Asia, and Latin America. This export pattern reflects the zone's strong alignment with value-added processing and specialised market channels.

Median barley ha (GIWA July estimates 2015–2025) – 555,000 ha or 35% of the state's barley ha.

In 2024, the top five barley varieties in the Kwinana port zone accounted for 88% of the barley area. In decreasing popularity, they were Maximus CL, Commodus CL, Buff, Spartacus CL, and RGT Planet. Maximus CL was planted on seven out of every ten barley hectares, making it fifteen times more prevalent than Spartacus CL. The area planted to RGT Planet halved compared to the previous year, reflecting a broader trend of declining interest in this variety. Imidazolinone-tolerant varieties (Maximus CL, Commodus CL, Spartacus CL, Zena CL, Scope CL, and Neo CL) occupied 82% and acid-tolerant varieties (Buff and Litmus) occupied 7% of the barley area. Neo CL, Titan AX, and Zena CL have all increased in popularity.

The Kwinana port zone stood out as the most concentrated region for varieties eligible for malt segregation. In 2024, only 18% of the barley area was planted to varieties not deliverable for malt in WA. By contrast, the share of non-segregable varieties in other zones was 39% in Geraldton, 24% in Albany, and 35% in Esperance. It's important to note that not all segregable varieties are supported by malt segregations in every port zone.

Looking ahead to 2026, Maximus CL is expected to remain the most popular variety, although its dominance may slightly decline. Neo CL is projected to be the major mover, gaining significant ground as Spartacus CL and RGT Planet are rapidly phased out, with 2025 likely marking their final season for most growers. The planting mix will remain diverse, incorporating Buff, Combat, Commodus CL, Laperouse, Litmus, and Titan AX, alongside a bulk-up of new feed lines such as Bigfoot CL, Granite CL, Kirwan CL, and PegasusAX. There is also strong interest in AGT-Bunyip IA, a dual-herbicide-tolerant barley variety with resistance to both imidazolinone

Port zone recommendations (cont'd)

and Aggressor® AX herbicides. The ability to control barley and brome grass while rotating herbicide groups is a key driver behind the development and adoption of these new lines, offering growers greater flexibility in managing weed resistance and crop performance.

Higher rainfall areas (> 350 mm annual rainfall)

Due to their proximity to Perth's malt processing facilities, the Kwinana North (Midlands) and Kwinana South regions offer the broadest range of malt barley segregations in WA. This strategic advantage makes these regions particularly attractive for growers targeting malt markets. However, despite the range of options, aligning receival points with actual variety production remains a logistical challenge. End-users, including maltsters and grain buyers, continue to encourage growers to prioritise planting malt varieties that are actively used by the trade, thereby ensuring market alignment and reducing inefficiencies.

Although the premium for growing malt barley remains subdued, Maximus CL and Neo CL are expected to remain the dominant varieties in this part of the port zone. Laperouse is gaining traction in the domestic market, offering a similar agronomic profile to Maximus CL but without tolerance to Clearfield® herbicides. Increased production of both Laperouse and Neo CL is anticipated, particularly in the southern areas of the region, where their agronomic fit is strongest.

RGT Planet remains in strong demand for domestic processing. In 2026, processors will begin evaluating Neo CL malted without processing aids, with the goal of meeting brewing specifications set by Heineken and Japanese brewers. If Neo CL proves successful in these trials, demand for RGT Planet is expected to decline rapidly. In the current deregulated market, and the absence of a general segregation for RGT Planet, processors may still accumulate it through niche segregations coordinated with bulk handlers or via on-farm storage arrangements with grain accumulators.

Lower rainfall areas (< 350 mm annual rainfall)

In the Kwinana North (East) region, Maximus CL is expected to remain the dominant barley variety in 2026, largely due to its status as the only option for delivery as MALT1 in this part of the port zone. Its continued prevalence reflects both market alignment and limited alternatives for malt segregation. However, in environments that yield less than three tonnes per hectare, where Clearfield® herbicide tolerance is not required, Beast is emerging as an alternative. As a feed barley, Beast offers robust performance and is well-suited to low-input systems.

On non-acidic, sandy-surfaced soils, Commodus CL is preferred over Maximus CL due to its agronomic advantages, particularly in terms of adaptability in seeding depth and weed competitiveness. These traits make it a more suitable choice for growers managing lighter soils. In contrast, on acidic soils, Buff and Litmus remain the most reliable options. Their tolerance to soil acidity ensures more consistent performance from barley, and they will remain dominant until Kirwan CL, an imidazolinone- and acid-tolerant feed barley, reaches sufficient production scale to support broader adoption. Kirwan CL is expected to play a more prominent role in future seasons as growers seek varieties that combine herbicide flexibility with soil adaptability.

Albany port zone

Market opportunity – export as grain and as malt (via domestic maltsters).

Target varieties – Maximus CL and Neo CL with limited segregations for Cyclops and Laperouse.

Detail

The Albany port zone presents a strong market opportunity for barley, both as grain and as malt via domestic maltsters. While most grain delivered in this zone is exported directly, a portion is transported to Perth for malting before being shipped overseas. This dual pathway reflects Albany's strategic role in supporting both bulk grain exports and value-added processing.

Median barley ha (GIWA July estimates 2015–2025) – 600,000 ha or 38% of the state's barley ha.

In 2024, the Albany port zone experienced a strong concentration of barley production among a limited number of varieties. The top five, Maximus CL, Laperouse, Spartacus CL, RGT Planet, and Cyclops, accounted for 84% of the total area planted to barley. Maximus CL was the clear leader, occupying nearly two-thirds of the barley area and proving to be twelve times more popular than Spartacus CL. As in the Kwinana port zone, the area planted to RGT Planet declined sharply, halving compared to the previous year. Imidazolinone-tolerant varieties, including Maximus CL, Spartacus CL, Zena CL, Commodus CL, Neo CL, and Scope CL, collectively made up 77% of the barley area. Notably, Cyclops, Laperouse, Neo CL, Titan AX, and Zena CL all gained traction among growers, reflecting a shift in varietal preferences.

Port zone recommendations (cont'd)

Looking ahead to 2026, consultant feedback suggests that Maximus CL will remain the most widely grown variety, although its dominance is expected to decline substantially. In its place, varieties such as Combat, Cyclops, Laperouse, and especially Neo CL are projected to rise in popularity. Neo CL is anticipated to be the most significant mover, likely to replace RGT Planet entirely. Within the Albany port zone, there are specific pockets where barley varieties with tolerance to Aggressor® AX herbicide is preferred, creating opportunities for Titan AX, PegasusAX, and the newly released dual-herbicide-tolerant AGT-Bunyip IA. These varieties offer growers the flexibility to manage barley and brome grass while rotating herbicide groups, a key consideration in sustainable agronomic planning. Additionally, niche varietal preferences will persist, with RGT-Atlantis expected to be planted in waterlogged paddocks and Kirwan CL targeted for bulk-up on acidic soils.

Non-coastal North area

Grain produced in the non-coastal areas of the Albany port zone is primarily exported to international customers as grain. When there is a shortage of quality malt barley in the Kwinana port zone, some of the grain received in the northern part of the port is delivered to Perth for malting. This is then shipped as malt.

Production of RGT Planet is no longer recommended due to its disease susceptibility. Maximus CL will be the dominant variety and will be supported by AGT-Bunyip IA, Beast, Bigfoot CL, Combat, Cyclops, Granite CL, Laperouse, Neo CL, PegasusAX and Titan AX. Laperouse and Neo CL will be popular if they can meet MALT1 specifications and premiums offered by the market incentivise their production.

Coastal South area

In the coastal region of the Albany port zone, barley production is focused entirely on export, with no domestic use. Due to the high risk of leaf diseases in this area, growers prefer barley varieties with strong disease resistance. Neo CL is expected to gain popularity thanks to its excellent disease resistance (except against Oxford virulent net-form net blotch), high yield potential, and the opportunity to deliver MALT1 specification grain for a premium (likely small) over feed at select receival sites.

Laperouse continues to perform well agronomically in this region. Cyclops, known for its high yield potential in environments that yield more than 3 t/ha, is competing with Maximus CL, particularly in rotations that don't use imidazolinone herbicides. The CoAxium®-tolerant varieties, such as Titan AX and PegasusAX, are also valuable in these non-imidazolinone systems. AGT-Bunyip IA, which shares a similar plant type with Cyclops and Maximus CL, is expected to become a future option, with on-farm seed multiplication set to commence in 2026. Its dual tolerance to both imidazolinone and Aggressor® AX herbicides is a key advantage. However, scald remains a significant disease risk for most varieties including Cyclops, Maximus CL, and Neo CL.

Feed barley varieties such as Combat and Ember are also suited to these high-risk environments. Combat remains a viable option, but is increasingly vulnerable to powdery mildew and prone to lodging. Ember, a new long-season feed variety from InterGrain, is entering its first production year and offers strong adult-plant resistance to most major leaf diseases, except spot-form net blotch. RGT-Atlantis may be suitable for waterlogged areas, provided its susceptibility to blotch diseases is managed effectively.

Esperance port zone

Market opportunity – export as grain.

Target varieties – Maximus CL and Neo CL with limited segregations for Cyclops.

Detail

Grain delivered in the Esperance port zone is exported as grain.

Median barley ha (GIWA July estimates 2015–2025) – 290,000 ha or 18% of the state's barley ha.

In 2024, the top five barley varieties grown in the Esperance port zone, Maximus CL, Combat, Rosalind, Spartacus CL, and Beast, accounted for 83% of the total area planted to barley. Nearly two-thirds of this area was planted to either Maximus CL or Spartacus CL, with Maximus CL alone representing one in every two hectares and being almost nine times more prevalent than Spartacus CL. The area planted to RGT Planet was halved compared to 2023, reflecting a shift in grower preferences. Imidazolinone-tolerant varieties (Maximus CL, Spartacus CL, Commodus CL, Zena CL, Scope CL, and Neo CL) occupied 62% of the barley area, the lowest proportion of any port zone. Combat emerged as the biggest mover, gaining significant ground, while Beast saw a modest increase. In contrast, Rosalind experienced a sharp decline, with its area halved from the previous year. Consistent with trends observed in 2023, the Esperance port zone maintained a strong focus on growing feed-only classified barley varieties, more so than any other port zone.

In 2026, Maximus CL and Neo CL are expected to be the most popular barley varieties in the Esperance port zone. Their popularity is driven by their ability to be delivered as MALT1, their compatibility with imidazolinone herbicide rotations, and their strong agronomic credentials. Alongside these leading varieties, there will be a continued production focus on feed types such as Beast, Combat, Bigfoot CL, Ember, and Granite CL.

Ember, a new long-season feed barley, is gaining interest due to its strong overall disease resistance profile. It is particularly well-suited to early planting in high-risk environments, making it a promising option for growers seeking resilience and performance.

Despite growing interest in herbicide-tolerant systems, the adoption of CoAxium®-tolerant barley varieties in this port zone has lagged behind in the Kwinana and Albany zones. However, PegasusAX, a CoAxium® variety with a Rosalind plant type, may attract attention from growers seeking to manage brome and barley grass in non-imidazolinone rotations. Following trends seen in the Albany port zone, Cyclops is also expected to compete with Maximus CL in these rotations due to its higher yield potential. Additionally, AGT-Bunyip IA is likely to appeal to growers due to its dual tolerance to imidazolinone and Aggressor® AX herbicides, as well as its plant type similarity to Maximus CL, which has performed well in this region.

GIWA BARLEY COUNCIL

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