



2016/17 PREFERRED MALTING BARLEY VARIETIES

Market insights: Preferred malting varieties for 2016/2017

GrainCorp is one of the world's largest malting companies with a global network that supplies the world's biggest brewers.

We have worked closely with our domestic and international maltsters and brewing customers to gauge their upcoming demand for the major varieties grown by the Australian barley industry.

At GrainCorp, we keep the preferred variety list continually updated in line with market demand. Combined with our involvement with various Australian grower and industry groups, we believe the current market demands warrant segregations for the following varieties:

GRAINCORP AREA	BAUDIN	COMMANDER	GAIRDNER	LaTrobe	SCOPE	WESTMINSTER	HINDMARSH*
QUEENSLAND							
Dalby		✓					
Inner Downs		✓					
Goondiwindi		✓					
NORTHERN NEW SOUTH WALES							
Moree North		✓	✓			✓	
Moree South		✓	✓				
Burren Junction		✓	✓				
Narrabri		✓	✓				
Werris Creek		✓	✓				
Dubbo North		✓	✓				
Dubbo West		✓	✓				✓

See over page for Southern New South Wales and Victoria.



GRAINCORP AREA	BAUDIN	COMMANDER	GAIRDNER	LaTrobe	SCOPE	WESTMINSTER	HINDMARSH*
SOTHERN NEW SOUTH WALES							
Parkes		✓		✓			✓
Wyalong				✓			✓
Griffith				✓			✓
Temora		✓		✓			✓
Cunningar							
Junee				✓			✓
Boree Creek				✓			✓
VICTORIA							
North East Vic	✓			✓			✓
Central Vic			✓	✓			✓
Northern Mallee				✓	✓		✓
Southern Mallee				✓	✓		✓
Swan Hill				✓	✓		✓
Wimmera				✓	✓		✓
Western Districts						✓	

*** Hindmarsh is a food barley**

Disclaimer: The above table should not be taken as a guarantee that GrainCorp will provide segregations for these varieties in each respective operating cluster. Site segregations have been planned in consultation with growers and GrainCorp's end users and will be discussed at the Pre-Harvest Meetings. This document is for information purposes only and is subject to change.

The target date issued by Barley Australia for a decision to be made on potential new malting variety accreditation is March 2018 for Compass and Spartacus (IGB 1344T). A decision is expected to be made on SY Rattler in March 2017.



GrainCorp's world-renowned malting barley expert John Stuart has worked closely with growers to develop the proposed segregations listed above which are based on the historical characteristics of malt barley growing areas. The table should be used as a guide only and is only an indication what varieties GrainCorp's malting and brewing customers are seeking. In addition to the preferred varieties table, John offers the following commentary:

The *Westminster* variety is highly sought after by Geelong and Melbourne maltsters and brewers because it is one of very few barleys that has the ability to malt well without the use of additives. Westminster grows extremely well in the higher rainfall climates of southern Victoria and has an ideal market fit here. There is also significant maltster and brewer demand into Brisbane, hence the intended guide segregations listed in our northern region.

The *Commander* variety has a very strong demand base in Australia's northern region where it performs well agronomically. Its grain size and higher proteins from the rich black soils makes it an ideal fit for this growing region.

Whilst we expect to see *LaTrobe* eventually replace *Hindmarsh*, there is a current demand for both. The *Hindmarsh* variety continues to draw strong demand in the lower rainfall zones of central/southern NSW as well as large parts of northern Victoria where it performs better agronomically.

Market observations

The information we are receiving from end users would suggest growers should continue to plant the established market varieties such as those listed in the table above where demand may be more easily established due to adequate volumes.

Traditionally, many domestic brewers prefer the lower fermentable varieties such as *Westminster* or *Commander*. Small amounts of *Navigator* and *Gairdner* may be encouraged if the ability to segregate these occurs.

High fermentable export type barleys such as *LaTrobe*, *Buloke*, *Scope* and the food barley *Hindmarsh* continue to see demand in markets such as China, South East Asia and Japan.

We will continue to work closely with industry and grower groups and provide a further update closer to harvest.

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