



# 2017/18 Preferred Malting Barley Varieties Guidelines

**GrainCorp is one of the world's largest exporters of barley with a global network that supplies the world's largest maltsters and 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 suggests that the varieties in the below table should be grown in the corresponding areas outlined below.

Disclaimer: The table overleaf 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.



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# Marketing Insights: Preferred Malting Varieties Guidelines for 2017/2018

GrainCorp Area	Commander	Gairdner	Latrobe	Scope	Westminster*	FOOD	UNDER EVALUATION	
						Hindmarsh**	Compass***	Spartacus***
<b>Queensland</b>								
Darling Downs	✓							
Goondiwindi	✓							
<b>Northern New South Wales</b>								
Moree North	✓	✓						
Narrabri	✓	✓						
Werris Creek	✓							
Dubbo North	✓	✓	✓					
Dubbo West	✓		✓			✓		
<b>Southern New South Wales</b>								
Parkes			✓					
Wyalong			✓			✓		
Griffith			✓					
Temora			✓			✓		
Cunningar								
Junee			✓					
Boree Creek			✓			✓		
<b>Victoria</b>								
North East			✓			✓		
Central Victoria		✓	✓		✓	✓		
Swan Hill			✓				✓	✓
Northern Mallee				✓			✓	✓
Southern Mallee			✓	✓				✓
Wimmera	✓	✓	✓	✓				

\* Westminster preferred in southern half of Central Victoria cluster and Geelong.

\*\* Hindmarsh is an approved food barley variety, not a malting barley variety.

\*\*\* Compass and Spartacus are undergoing malting evaluation and may be accredited, with a decision being made in March 2018.

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# Market Observations



## Queensland

**Commander** once again has seen strong demand from the domestic market throughout the 16/17 season. There is good demand from the Chinese market for **Commander** and it is a well-established variety with all major brewers. GrainCorp recommends that Queensland farmers grow **Commander**.



## Northern NSW

**Commander** once again has seen strong demand from the domestic market throughout the 16/17 season. There is continued demand from the international market and it is an approved and well established variety with all major brewers. **Gairdner** is still seeing a small amount of demand from local brewers. It is expected that GrainCorp will have very limited segregations for **Gairdner**. GrainCorp recommends that Northern NSW farmers grow **Commander**.



## Southern NSW

**Hindmarsh** and **Latrobe** are the two dominant varieties in Southern NSW. **Latrobe** has gained strong market acceptance from most in the Chinese malting and brewing industries. **Hindmarsh** continues to have strong demand from the Japanese food market as well as Chinese brewers. GrainCorp recommends that Southern NSW farmers grow **Hindmarsh** or **Latrobe**.



## Victoria

**Hindmarsh**, **Latrobe** and **Scope** were the dominant varieties grown through Victoria in the 2016/17 season. **Scope** continues to be accepted by brewers overseas and **Latrobe** has seen increasing acceptance from the Chinese brewing industry and demand is expected to continue to grow. **Hindmarsh** has been used in China and as a food barley in Japan for a number of years now and has strong demand from both of these markets. **Baudin**, **Gairdner** and **Commander** are declining varieties and given the very small volume of these varieties available in Victoria, GrainCorp is only likely to have very limited segregations for the 2017/18 season. **Westminster** is the most popular variety in the Western Districts and Geelong area. It has strong demand from domestic brewers as well as the international market. GrainCorp recommends that Victoria farmers grow **Hindmarsh**, **Latrobe**, **Scope** and **Westminster**.



## New Varieties

**Spartacus** and **Compass** are newer varieties that are under evaluation as potential malting barleys by Barley Australia. A decision on these varieties is expected in March 2018. Both varieties passed Stage 1 of the process and have progressed to Stage 2.

**Spartacus** is genetically similar to **Latrobe** with the addition of a herbicide resistance characteristic. Given the strong market acceptance of **Latrobe** from Asian maltsters and brewers, **Spartacus** should be accepted reasonably quickly in some Asian markets if it is to gain accreditation from Barley Australia.

**Planet** and **Biere** are expected to be under evaluation until at least March 2019. GrainCorp will not be storing these varieties in the 2017/18 season.



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