

Western Australian Malt Barley Variety Receival Recommendations for the 2025–26 Harvest

Summary 2025–26 Harvest

The following observations are relevant:

- Australia accounts for 30-40% of the global malt barley trade.
- Over the last four years, AEGIC has collaborated with the industry to foster relations and build international awareness of the quality of Australian barley in Mexico, Peru, Ecuador, Africa, and Southeast Asia, as well as potential new markets in Brazil and Columbia. This is proving beneficial for new and old customers, assisting them in optimising the value of the Australian barley they purchase.
- China has re-emerged as the largest buyer of premium malt barley, FAQ malt multi-variety barley, and feed barley from Australia following the lifting of anti-dumping and countervailing duty measures in August 2023. Their preference for Australian grain is driven by our quality (primarily associated with the low moisture of our grain, low mycotoxins, and rapid germination for malting purposes), the lack of import tariffs, and freight advantages over grain from other origins, including Europe, the Black Sea, and Canada.
- While beer consumption is down in China, the demand for malt barley (predominantly FAQ malt multi-variety) remains strong. Premiumisation of the Chinese beer market is driving the higher-malt demand for their beer recipes.
- Latin and South American markets were developed while China was absent. Despite the re-emergence of China, they remain important from a value and volume perspective. Mexico, Peru,

Table 1. Western Australian malt barley variety segregation recommendations by Port Zone for the 2025–26 harvest

Port Zone	Geraldton	Kwinana		Albany		Esperance	Comment	
		North (Midlands)	South	North (East)	North	South		
YES	This is a recommended variety for this production zone. Segregations will be preferentially allocated to this variety.							
Limited	Limited segregations are 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 is only available if a marketer has sufficient tonnage to supply domestic or international customers. Marketers should contact CBH to negotiate niche segregation, and growers should contact 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.							
Malting varieties								
Buff (b)	NO	NO	Niche	NO	NO	NO	NO	Production volumes do not support segregation. The use of Buff for additive-free malting will be driven by contracting.
Commodus CL (b)	NO	NO	Limited	NO	NO	NO	NO	Production volumes support limited segregation. International markets are unfamiliar with its quality profile.
Maximus CL (b)	Limited	YES	YES	YES	YES	YES	YES	The dominant variety in each port zone. Approved in markets outside China, with developing Chinese market acceptance.
RGT Planet (b)	NO	NO	Limited	NO	Limited	Limited	Limited	Important variety for customers seeking malt made without processing aids, but supply is the issue.
Spartacus CL (b)	NO	Limited	Limited	Limited	Limited	Limited	Limited	On-farm production replaced by Maximus CL, affecting supply and market demand.

Summary 2025–26 Harvest (cont'd)

and Ecuador have become valued customers of malt barley grain as they only buy premium malt barley, not FAQ or feed barley. Without those markets, the spread between malt and feed barley would be tighter.

- Brazil and Columbia are growing opportunities for our premium malt barley grain. Brazil brewers currently import Australian malt (processed malt barley) but not grain, as there is no established grain import protocol. There is commercial pull in Columbia, too, but import tariffs are high. Therefore, Australian premium malt barley grain is cost-prohibitive for Columbian beer recipes. If those two-grain markets were to come online, with much work still to be done, this would represent a significant export opportunity for WA growers as they only buy premium malt barley.
- Trade of feed barley to Saudi Arabia has declined rapidly in recent years as they increasingly move to compound feed sources for their animal industries. The decreased demand has increased our reliance on China as a purchaser of feed barley. However, the trade of feed barley to China could be severely hampered by recent reports suggesting that the Chinese government is looking to limit purchases of international feed grains to support local Chinese producers. The last time the barley trade to China was limited (due to the tariffs), Saudi Arabia was still an active buyer in the market. There is no straightforward substitute in the market if the Chinese government follows through and directs limits on feed grain imports. A significant impact on the feed barley price is expected if imports are limited.
- In WA, growers have many barley choices, with 31 varieties occupying at least 100 ha of the 2024 season barley acreage. Of these 31 varieties, only 13 varieties (not all segregated) occupy at least 10,000 ha each in at least one port zone, with six varieties occupying 10,000 ha or more in two port zones, three in three port zones and only one in all four port zones. Maximus CL is the dominant barley variety in WA, accounting for two in every three-ha sown to barley.
- Market demand from Southeast Asia and Japan for premium malt barley remains positive, especially for varieties that can be malted without processing aids. WA production of varieties that suit processing without processing aids is now restricted to RGT Planet, as the volume of Bass and Flinders is no longer sufficient to support segregation.
- Unfortunately, the low supply of RGT Planet will result in the exclusion of WA malt barley in several premium markets in Asia until the production of new varieties suited to malting without processing aids ramps up. Buff is an option, but production volumes and the environment in which it is grown do not support significant segregation opportunities in WA. With market pull and sufficient production, niche segregations could be offered for Buff in the Kwinana Port Zone.
- The Australian malting barley industry differentiates varieties based on their fermentability (proteolytic) profile. Traditionally, WA only segregates and exports varieties with at least a medium-high fermentability profile (for example, Baudin, Bass, Flinders, Maximus CL, RGT Planet, and Spartacus CL).
- The agronomic value of Maximus CL to growers has resulted in its dominating production, with the supply of RGT Planet and Spartacus CL insufficient to meet market demand. There is now a lack of choice for WA premium malt barley grain and malt buyers. The industry hopes that at least a couple of the varieties undergoing Stage 2 accreditation with Grains Australia can fill gaps in the market and be adopted by growers in sufficient quantities to support segregation to create a market choice.
- While WA has not previously exported varieties with a medium fermentability profile (e.g., Commodus CL and Compass), production volumes of Commodus CL in 2025 may support an opportunity to segregate small volumes of a medium fermentability variety in WA. International market development for Commodus CL will occur from grain grown in SA, which is expected to occupy around half of the SA barley production area. Market pull from WA is still likely to be limited. Growers should anticipate that any market price offered will be just above the feed price and at a discount to the premium malt varieties Maximus CL, RGT Planet, and Spartacus CL.
- Minotaur and Zena CL were malt accredited by Grains Australia in 2024. For Minotaur, production volumes are unlikely to support segregation at WA's 2025–26 harvest. There has also been limited international market development undertaken for this variety. Zena CL is an imidazolinone-tolerant variety derived from RGT Planet. While its malt quality profile is envisioned to mirror RGT Planet at an industrial scale, production volumes are unlikely to support segregation at WA's 2025–26 harvest.
- Segregation opportunities for Buff, Commodus CL, Maximus CL, RGT Planet, and Spartacus CL vary by port zone across WA and within a port zone for the Kwinana and Albany Ports (Table 1).



Introduction

Why rationalise malt varieties?

The WA barley industry supports the long-term aim of segregating up to two malt varieties per port zone (sometimes three), with limited segregation for minor, new, or niche malt varieties. Segregating fewer malt varieties improves logistics (reducing storage and handling costs), makes segregation planning at a bin level more manageable, and encourages more robust demand from traders who are unwilling to risk buying small, unsaleable parcels.

At the same time, it is vital to have a spread of varieties that differ in their management and malt characteristics, allowing the blending of processed malt to customers' specifications and spreading agronomic risk. Treating malt barley crops with some chemicals may limit market access, as not all markets have import tolerances equal to Australian tolerances. For example, opportunistic markets like Europe currently do not purchase barley with imazapyr residue nor barley with detectable levels of diquat herbicide. Such markets might require specific segregations if they became regular and not opportunistic.

The Grain Industry Association of Western Australia (GIWA) Inc. (through the GIWA Barley Council) developed these recommendations in consultation with the WA barley supply chain. They aim to guide growers and consultants when planning the 2025 barley cropping program. A plan review will occur in autumn 2025, and any changes in demand will be presented to growers. This document's malt variety recommendations may differ from those of eastern Australia due to our focus on international markets.



Barley rationalisation process

Seven varieties in Stage Two of Grains Australia Malt Accreditation Program, AGTB0318, Beast, Cyclops, Laperouse, Neo CL, Titan AX, and Yeti, are not included in the 2025–26 variety receival recommendation plan. Expect a decision on the malt accreditation of those varieties in February or March 2025. Further information about those varieties can be found in the 'varieties undergoing malting and brewing accreditation' section.

Malt accreditation does not guarantee segregation opportunities, nor does it guarantee that international markets will willingly pay a premium for the variety or that there will be demand from brewing customers. Malt accreditation also does not imply the agronomic suitability of a variety of different growing environments in WA.

While GIWA facilitates publishing industry recommendations on what malt variety to grow, it has no control over the available segregations. Some sites can only offer a single malt barley segregation, whereas others may offer two or more. Growers are strongly encouraged to support segregation planning by submitting information on their area planted and attending pre-harvest meetings.

The Australian barley industry works hard to uphold the quality of Australian malt variety quality delivered to the end customer. It does not support the co-binning of segregated malt varieties, even if they have similar agronomic traits. Growers should not intentionally contaminate a malt barley stack with another variety. Correct variety declaration is a legal requirement under the *Plant Breeders Rights Act*, and misdeclaration breaches the *Bulk Handling Act 1967*. Growers should be careful not to contaminate their seed stocks by mixing varieties that look similar, i.e., La Trobe, Maximus CL, or Spartacus CL, or mix them with any

other variety. The adoption of machine learning technology for varietal recognition on delivery is being phased in to assist with correct varietal declaration.

International market signals highlight Australian malt barley's generally low protein status. 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)

Table 2. Market acceptance and trends in market demand of accredited malt barley varieties grown in Western Australia for 2025–26 harvest

PREFERRED	Variety is the first choice for buyers in this market segment. A PREFERRED variety is likelier to attract a higher malt premium than an ACCEPTABLE variety.
ACCEPTABLE	Variety purchased as an alternative to a PREFERRED variety.
Being assessed	Variety is undergoing international market development. This does not imply that there will be future market demand.
No demand	There is no buyer for this variety for this market segment.

Market type (market size)	Export as grain (> 500,000 t)	Export as malt (300,000 t)	Shochu (160,000 t)
Buff (b)	No demand	Being assessed	No demand
Commodus CL (b)	Being assessed	Being assessed	No demand
Maximus CL (b)	ACCEPTABLE (stable)	ACCEPTABLE (stable)	ACCEPTABLE (stable)
RGT Planet (b)	PREFERRED (stable)	PREFERRED (stable)	No demand
Spartacus CL (b)	ACCEPTABLE (declining)	ACCEPTABLE (stable)	PREFERRED (stable)

Note: Market size – The volumes in brackets only indicate potential market size and vary considerably from year to year. They are intended to show differences in market demand and how this may influence demand for different varieties and demand by port zone.

Variety Specific Recommendations

With new malt varieties being released and adopted by growers faster than the phasing out of old malt varieties, the rapid turnover of varieties is a common sticking point for end-users who desire long-term supply and familiarity to optimise their end-use. New varieties also create inefficiency for bulk handlers, with each malt segregation adding to storage and handling costs. The GIWA barley variety rationalisation plan attempts to balance the benefits to growers from accessing new malt varieties with the demand from customers for access to large parcels of the same malt variety over at least five years.

Each malt barley variety grown in WA has unique malting attributes. Consequently, brewers purchase varieties based on availability, familiarity, price, beer styles, and the type and level of adjunct used in their brewing recipe. This document outlines proposed segregation opportunities by port zone (Table 1), market usage and demand by industry sector (Table 2), and varietal-specific comments.

Growers should use the market signals in this document to help decide which malt variety or varieties to sow in 2025. Market demand, pricing signals, and segregation locations should be considered when determining malt variety choice, along with the agronomic management required and the risk associated with delivering malt-grade barley. Varieties listed as PREFERRED are more likely to attract higher premiums than ACCEPTABLE varieties. As these industry recommendations are a guide, the segregations implemented at the 2025–26 harvest might differ from those proposed in this document. Growers should liaise regularly with their bulk handlers to confirm segregation.



Variety Specific Recommendations

Accredited malt varieties

The malt barley recommendations for the 2025 season are as follows:

Buff (b)

- Buff is being assessed for export as malt, with international grain markets unlikely to be exposed to Buff.
- Buff is not being assessed for the manufacture of shochu in Japan.
- Given the declining RGT Planet supply, Buff could potentially assist (in small volumes) the WA industry in continuing to supply additive-free malt to Southeast Asia and Japan.
- Grains Australia has indicated that Buff is a variety with a high fermentability profile and, consequently, would be ideally suited to adjunct brewing.
- Target production zones in 2025 are niche segregations in Kwinana-South (subject to supply and market pull).

Commodus CL (b)

- Commodus CL is being assessed for export as grain and as malt.
- Not being assessed for the manufacture of shochu in Japan.
- Grains Australia has indicated that Commodus CL is a variety with a medium fermentability profile.
- International market development will be driven by grain produced in SA.
- Commodus CL will likely be purchased opportunistically in WA based on price. Growers should anticipate a slight premium over feed and a lower market price than for the established malting varieties Maximus CL, RGT Planet and Spartacus CL.
- Target production zones in 2025 are limited segregations in Kwinana-South.

Maximus CL (b)

- Maximus CL is acceptable for export as grain and malt and is being assessed for the manufacture of shochu in Japan.
- Maximus CL malt has a high extract and enzyme potential (high fermentability) and is suitable for starch-adjunct brewing.
- Maximus CL is now the dominant variety in all port zones.
- Approved by brewing customers outside of China, with market acceptance of Maximus CL in China growing.
- Use recommended imidazolinone herbicides and be aware of market advice regarding delivering grain from paddocks sprayed with an imidazolinone herbicide.
- Target production zones in 2025 are Geraldton, Kwinana, Albany and Esperance port zones.



RGT Planet (b)

- RGT Planet is preferred for export as grain and as malt.
- Not suitable for the manufacture of shochu in Japan.
- RGT Planet malt has excellent extract with a moderate enzyme potential and is suitable for sugar- and starch-adjunct brewing.
- RGT Planet is a globally recognised malt variety that can be suitable for malting without processing aids. There is currently insufficient MALT1 grade RGT Planet supply to meet demand, often resulting in premiums above Maximus CL and Spartacus CL.
- Target production zones in 2025 are limited segregations in the Kwinana-South, Albany, and Esperance port zones.

Spartacus CL (b)

- Spartacus CL is acceptable for export as grain and malt and is preferred for manufacturing shochu in Japan.
- Spartacus CL malt has a high extract with very good enzyme potential and is suitable for starch-adjunct brewing.
- Spartacus CL exhibits different malting characteristics than Maximus CL. For some customers, these differences are desirable. The rapid decline in grower production of Spartacus CL is limiting our opportunity to meet some customer specifications for export malt.
- Use recommended imidazolinone herbicides and be aware of market advice regarding delivering grain from paddocks sprayed with an imidazolinone herbicide.
- Target production zones in 2025 are limited segregations in the Kwinana, Albany and Esperance port zones.

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 malting 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 2026) include:

- Spinnaker (tested as SCA21-Y003, breeder – SECOBRA Recherches).

Varieties in Stage Two (target accreditation date is March 2025) include:

- AGTB0318 (tested as AGTB0318, breeder – AGT),
- Beast (tested as AGTB0113, breeder – AGT),
- Cyclops (tested as AGTB0200, breeder – AGT),
- Laperouse (tested as WI4952, breeder – University of Adelaide, agent – SECOBRA Recherches through SeedNet),
- Neo CL (tested as IGB22102T, breeder – InterGrain),
- Titan AX (tested as AGTB0325, breeder – AGT), and
- Yeti (tested as ABTB0043, breeder – AGT).

Two varieties in Stage Two malt accreditation, AGTB0318 and Yeti, are not expected to be segregated in WA even if they meet the Grains Australia malting and brewing accreditation requirements.



AGTB0318 and Yeti malt accreditation and agronomic evaluation only occur in eastern Australia, and there is a low probability of their commercialisation in WA.

The domestic industry has expressed interest in three of the five varieties in Stage Two malt accreditation. Feedback suggests that if accredited, niche segregations may be offered at the 2025–26 harvest for market development purposes and evaluation by domestic processors. The following comments are relevant:

- **Cyclops** – medium height, early spring variety with the same erect growing habit as Maximus CL but with different genetics and no tolerance to imidazolinone chemistry. The breeder has engaged with grain marketers and malt companies operating in WA, and there is positive interest in Cyclops, subject to accreditation and sufficient production scale. In 2024, grower production is highest in the Albany and Esperance port zones.
- **Laperouse** – medium height, medium spring variety targeted for sowing in medium to higher rainfall areas with good straw strength and head retention but no tolerance to imidazolinone chemistry. Farmer production of Laperouse in 2024 is similar to Cyclops and more advanced than Neo CL's. A concentration of Laperouse production is found in the western to central areas of the Albany Port Zone.
- **Neo CL** – medium height, medium spring variety with tolerance to imidazolinone chemistry. The breeder has engaged with grain marketers and malt companies operating in WA, and there is positive interest in Neo CL, subject to accreditation and sufficient scale of production. In 2024, grower production is highest in the Kwinana and Albany port zones.

The future of Beast and Titan AX, as potentially deliverable malt varieties, depends on the success of Commodus CL. They, like Commodus CL, have a medium fermentability profile. The medium fermentability profile is an unproven market opportunity for WA export markets. If there was a market pull, the production volumes of Beast and Titan AX could grow upon successful Grains Australia accreditation.

Entry into the Grains Australia malt accreditation program does not guarantee varietal accreditation for malting and brewing or acceptance by international customers of our grain and malt. GIWA recommends caution in adopting a variety under accreditation or sowing large areas to them with the expectation of future segregations unless there is a clear agronomic or grain yield advantage to planting them as feed-only barley.

For further information about any varieties under Grains Australia assessment, talk to the relevant breeder or seed licensee to determine their agronomic characteristics, potential market fit and seed availability. It is important to note that accreditation as a malt variety by Grains Australia does not guarantee segregation or customers domestically or internationally. Unless a new malt variety out-performs established malting varieties in agronomic and processing capacities, the trade will be reluctant to be involved in or encourage 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 – Maximus CL.

Detail

Grain delivered in the Geraldton Port Zone is exported as grain.

Median barley ha (GIWA July estimates 2015–2024) — 95,000 ha or 6% of the state's barley ha.

In 2023, the top five barley varieties in the Geraldton Port Zone accounted for 83% of the barley area. In decreasing popularity, they were Maximus CL, Spartacus CL, Litmus, Scope CL, and Beast. Half the barley area was either Maximus CL or Spartacus CL, with Maximus CL twice as prevalent as Spartacus CL. Imidazolinone-tolerant varieties (Maximus CL, Spartacus CL, Scope CL, and Commodus CL) occupied 65%, and acid-tolerant varieties (Litmus and Buff) occupied 19% of the barley area.

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. Nearly three in every five barley ha was either Maximus CL or Spartacus CL, with Maximus CL almost three times more prevalent than Spartacus CL. 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. Maximus CL, Titan AX and Yagan were the only varieties increasing in popularity from 2023 to 2024.

The low production base in this port zone makes it difficult for the industry to recommend more than one main malt variety. Maximus CL is the only malt variety grown in sufficient volumes in the Geraldton Port Zone to justify varietal segregations. Buff could be delivered directly to domestic processors or upcountry receival points that may be established in the Kwinana-South Port Zone.

Projecting forward into 2025, feedback from consultants suggests that Maximus CL will still be the dominant variety sown with grower interest in Beast, Buff, Litmus, and Titan AX. Commodus CL is not expected to grow in popularity in this port zone. The industry is predicting a significant drop in the planting of Spartacus CL. It is unclear if the release of two new imidazolinone-tolerant feed varieties, Bigfoot CL, and Granite CL, will increase the popularity of imidazolinone-tolerant varieties in this port zone.

Kwinana Port Zone

Market opportunity – export as grain, as malt and for shochu.

Target varieties – Maximus CL, with limited segregations for RGT Planet (Kwinana-South only), Spartacus CL and Commodus CL (Kwinana-South only) and niche segregations for Buff (Kwinana-South only).

Detail

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 tiny proportion of the grain received is exported as grain to Southeast Asia, despite new market opportunities opening in Africa, Latin America, and South America.

Median barley ha (GIWA July estimates 2015–2024) — 552,500 ha or 36% of the state's barley ha.

In 2023, the top five barley varieties in the Kwinana Port Zone accounted for 89% of the area sown to barley. In decreasing popularity, they were Maximus CL, Spartacus CL, Commodus CL, Buff, and RGT Planet. Three-quarters of the barley area was either Maximus CL or Spartacus CL, with Maximus CL four times more prevalent than Spartacus CL. Imidazolinone-tolerant varieties (Maximus CL, Spartacus CL, Commodus CL, and Scope CL) occupied 82% and acid-tolerant varieties (Buff and Litmus) occupied 7% of the barley area.

In 2024, the top five barley varieties in the Kwinana Port Zone accounted for 88% of the area sown to barley. In decreasing popularity, they were Maximus CL, Commodus CL, Buff, Spartacus CL, and RGT Planet. Three-quarters of the barley area was either Maximus CL or Spartacus CL, with Maximus CL now fifteen times more prevalent than Spartacus CL. The area sown to RGT Planet halved compared to 2023. 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 increased in popularity.

However, the Kwinana Port Zone was the most concentrated for varieties that can be delivered into a malt segregation. In 2024, only 18% of the area was sown to varieties that could not be delivered for malt in WA. In the other port zones, 39%, 24% and 35% of the area (Geraldton, Kwinana, and Esperance port zones, respectively) were sown to varieties that could not be segregated as malt (noting malt segregations are not available for all segregable varieties in all port zones).

As we move into 2025, feedback from consultants indicates that Maximus CL will continue to be the most popular variety. The acreage of RGT Planet and Spartacus CL will limit opportunities for segregation. Buff's future growth above current production levels depends on domestic processors' market pull. Likewise, Commodus CL acreage may grow if there is market pull and any premium offered relative to feed incentivises its production. There is currently limited pull for the delivery of Minotaur to domestic processors. Consultants anticipate growth for Laperouse and Neo CL if they complete Grains Australia malting and brewing accreditation. The CoAxiom® tolerant varieties, PegasusAX and Titan AX, are expected to grow in popularity where brome grass and barley grass are problematic, and there is no imidazolinone use in that part of the rotation. The two new imidazolinone-tolerant feed varieties, Bigfoot CL and Granite CL, will garner interest from growers who are not chasing the malt premium, as historically, the adoption of varieties with the Clearfield® trait is very high in this port zone.

Port Zone Recommendations (cont'd)

Higher Rainfall Areas (> 350 mm annual rainfall)

Due to Perth's proximity to the malt barley market, the higher rainfall areas of the Kwinana Port Zone (Kwinana-North (Midlands) and Kwinana-South) have the highest number of malt barley segregation choices available to growers. Many variety options pose issues in matching receival points to variety production. End-users (maltsters and grain acquirers) encourage growers to sow only those varieties used by the trade.

Substantial demand for RGT Planet for domestic processing will continue in 2025. If accredited, market development demand for Laperouse and Neo CL will likely commence. Grower production of Maximus CL will continue to exceed market demand.

Buff may have market interest if there is sufficient production, given its malt quality. It is an option for soils with an acidic profile and in areas with minimal risk of foliar disease. There may be a market pull to accumulate Commodus CL and to test the market interest of this quality type if there is sufficient production.

Lower Rainfall Areas (< 350 mm annual rainfall)

In 2024, Maximus CL will dominate the barley acreage sown in the lower rainfall area, Kwinana-North (East), with smaller production of Buff on acid soils, growing interest in Commodus CL for imidazolinone-based rotations and Titan AX (and the new feed variety, PegasusAX) for non-imidazolinone-based rotations. There will be grower scrutiny of the two new imidazolinone-tolerant feed varieties Bigfoot CL and Granite CL.

Albany Port Zone

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

Target varieties – Maximus CL with limited segregations for RGT Planet and Spartacus CL.

Detail

Grain delivered in the Albany Port Zone is primarily exported as grain. Some grain is also sent to Perth and converted into malt before being shipped.

Median barley ha (GIWA July estimates 2015–2024) — 595,000 ha or 38% of the state's barley ha.

In 2023, the top five barley varieties grown in the Albany Port Zone accounted for 90% of the area sown to barley. In decreasing popularity, they were Maximus CL, Spartacus CL, RGT Planet, Rosalind, and Laperouse. Nearly three-quarters of the area was sown to Maximus CL or Spartacus CL. Maximus CL accounted for three in every five barley ha and was almost five times more prevalent than Spartacus CL (and similarly relative to RGT Planet). Imidazolinone-tolerant varieties (Maximus CL, Spartacus CL, Commodus CL, Scope CL, and Zena CL) occupied 74%.

In 2024, the top five barley varieties grown in the Albany Port Zone accounted for 84% of the area sown to barley. In decreasing popularity, they were Maximus CL, Laperouse, Spartacus CL, RGT Planet, and Cyclops. Nearly three-quarters of the area was sown to Maximus CL or Spartacus CL. Maximus CL accounted for two in every three barley ha and was twelve times more popular than Spartacus CL. The area sown to RGT Planet halved compared to 2023. Imidazolinone-tolerant varieties (Maximus CL, Spartacus CL, Zena CL, Commodus CL, Neo CL, and Scope CL) occupied 77% of the barley area. Cyclops, Laperouse, Neo CL, Titan AX, and Zena CL increased in popularity.

As we move into 2025, the industry expects the rapid production decline of RGT Planet and Spartacus CL to continue as Commodus CL, Cyclops, Laperouse, and Neo CL increase. The area sown to Maximus CL will remain static. Interest in CoAxiom® tolerant varieties, PegasusAX and Titan AX, is predicted to grow in rotations where imidazolinone herbicides are not used. In low and medium rainfall areas, the performance of the new imidazolinone-tolerant feed varieties Bigfoot CL and Granite CL will be closely monitored.

Non-Coastal North Area

Grain produced in the non-coastal part of the Albany Port Zone is primarily exported as grain to international customers. 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 encouraged, but the main variety will be Maximus CL. Beast, Combat, Cyclops, Laperouse, PegasusAX and Titan AX suit rotations where imidazolinone herbicides have not been recently used. The imidazolinone-tolerant varieties Bigfoot CL, Granite CL, and Neo CL are expected to increase in area. The area sown to Commodus CL will be challenged by the new imidazolinone-tolerant feed varieties Bigfoot CL and Granite CL in the coming seasons unless the premium offered to deliver Commodus CL as a malt variety outweighs any agronomic disadvantage it may have.

Coastal South Area

Grain produced in the coastal part of the Albany Port Zone is exported as grain to international customers and not used domestically. As the production risk from leaf diseases is high, growers look at varieties with a higher disease resistance profile.

Market demand exists for Maximus CL, RGT Planet and Spartacus CL.

Combat, Laperouse and Neo CL will be evaluated for their fit relative to Maximus CL and RGT Planet. RGT Atlantis may have a fit in parts of the landscape where waterlogging is a regular limitation to crop production, assuming its susceptibility to blotch diseases can be managed cost-effectively.

Port Zone Recommendations (cont'd)

Esperance Port Zone

Market opportunity – export as grain.

Target varieties – Maximus CL with limited segregations for RGT Planet and Spartacus CL.

Detail

Grain delivered in the Esperance Port Zone is exported as grain.

Median barley ha (GIWA July estimates 2015–2024) — 295,000 ha or 19% of the state's barley ha.

In 2023, the top five barley varieties grown in the Esperance Port Zone accounted for 85% of the area sown to barley. In decreasing popularity, they were Maximus CL, Rosalind, Spartacus CL, RGT Planet, and Cyclops. Over half of the area was sown to Maximus CL or Spartacus CL. Maximus CL accounted for two in every five barley ha and was three times more popular than Spartacus CL. Imidazolinone-tolerant varieties (Maximus CL, Spartacus CL, Commodus CL, and Scope CL) occupied 56% and acid-tolerant varieties (Buff and Litmus), like in the Albany Port Zone, were nearly non-existent and occupied less than 1% of the barley area. The biggest movers were Cyclops and Maximus CL, while the area sown to Rosalind remained largely static.

In 2024, the top five barley varieties grown in the Esperance Port Zone accounted for 83% of the area sown to barley. In decreasing popularity, they were Maximus CL, Combat, Rosalind, Spartacus CL, and Beast. Nearly two-thirds of the area was planted to Maximus CL or Spartacus CL. Maximus CL accounted for one in every two barley ha and was almost nine times more prevalent than Spartacus CL. The area sown to RGT Planet halved from that planted in 2023. 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. The biggest mover was Combat, with a slight increase for Beast. The area sown to Rosalind decreased by half. As with 2023, there was a greater focus on growing varieties with a feed-only classification in this port zone than in any other port zone.

As we move into 2025, Maximus CL will remain the dominant variety, with RGT Planet's and Spartacus CL's production volumes limiting segregation opportunities. Consultant feedback suggests there will be growth in the acreage sown to Neo CL, with continued production focus on feed varieties like Combat, Bigfoot CL, and Granite CL. There has been limited adoption of CoAxiom[®] tolerant herbicide varieties in this port zone compared to the Kwinana and Albany port zones. PegasusAX, a CoAxiom[®] variety with a Rosalind plant type, may interest growers considering using Aggressor[®] to control brome and barley grass in their non-imidazolinone rotations. Minotaur is more prevalent in the Esperance Port Zone than any other. The future of Minotaur is uncertain as a malting variety in WA unless there is increased production.





GIWA BARLEY COUNCIL



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