

Market conditions provide ideal opportunity for new relationships

Recent changes in the world market for malting barley have helped to restore balance along the supply chain. They have given everyone a window of opportunity for consolidating and building contractual relationships. Members of the Maltsters' Association of Great Britain (MAGB) are urging growers to maintain diversity in crops as part of their overall risk management strategy. In return for a commitment to planting malting barley, maltsters will provide an assurance that farmers will receive an attractive price in the future.

David Wilkes, Chairman of the MAGB, explains: "A greater focus on building trust and 'chains of contracts' along the supply chain will lead to better returns for both maltsters and growers. This will inevitably secure a sustainable supply chain and ensure that the UK cereals industry remains as strong as ever through future fluctuations."

The trust between maltsters and growers is an extension of the work carried out through the Assured UK Malt (AUKM) scheme. The scheme adds value throughout the supply chain, linking to farm assurance schemes such as the Assured Combinable Crops Scheme (ACCS) and Scottish Quality

Cereals (SQA) on the one hand, and to schemes such as the British Retail Consortium (BRC) scheme further along the chain. By integrating the various stages of the supply chain, AUKM has developed a level of assurance and traceability throughout the chain, which is unequalled anywhere in the world.

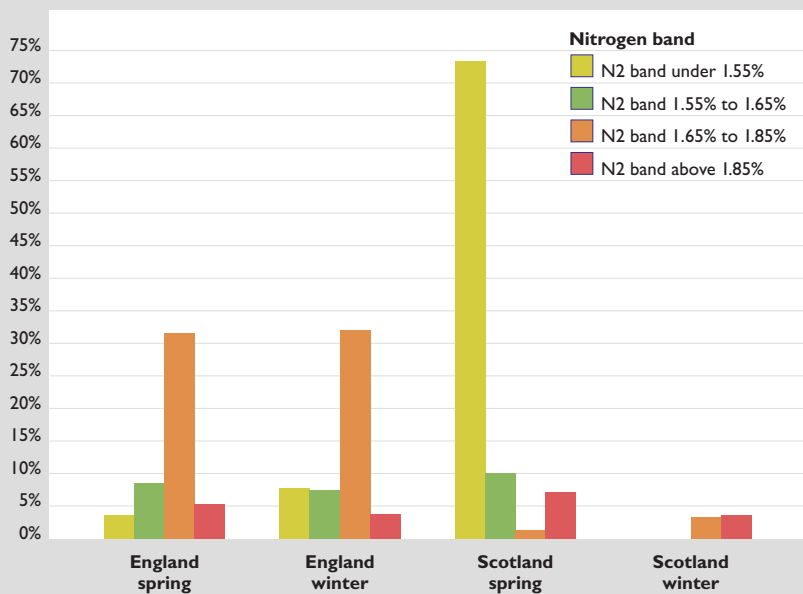
Tony Pexton, Chairman of the Assured Combinable Crops Scheme, comments: "In a world increasingly concerned not only with food safety, but also environmental and animal welfare issues, our customers need confidence in our on-farm production and storage standards. Red Tractor schemes, with their setting of standards across industry and independent inspection, gives them the assurance that they seek, and provides the first step for processors to set up integrated assurance schemes right through the chain to the final product."

"The Assured UK Malt scheme is an excellent example of integration between on-farm schemes and processing. It adds value for the grower, and gives buyers, retailers and consumers total confidence in the ingredients they are using and consuming."

The maltsters' nitrogen wish-list

UK maltsters are likely to buy around 1.6 million tonnes of malting barley from the 2007 crop. To assist their suppliers they always show on the MAGB website (www.ukmalt.com) early each year how that tonnage will be bought in different nitrogen bands, shown for Scotland and England. The chart for the 2007 crop wish-list is shown right.

MAGB members' wish-list for 2007 barley crop purchases from England and Scotland Percentage of total purchases



The IBD approved malting barley list for 2008 harvest

The Malting Barley Committee has completed the spring 2007 round of meetings to evaluate the potential of new malting barley varieties. As with the 2007 IBD Approved List varieties are now approved on the basis of their suitability for brewing use and/or distilling use rather than by geographical area. This guide helps growers of malting barley identify varieties most likely to meet the needs of the market in the year ahead.

Additions to the IBD approved list

- **Appaloosa** has been granted Full Approval for distilling use.
- **Cassata** has been granted Provisional Approval 2 for brewing use.
- **Quench** has been granted Provisional Approval 1 for brewing use.
- **Publican** has been granted Provisional Approval 1 for distilling use.
- **Tartan** has been granted Provisional Approval 1 for special use (grain distilling).

Brewing use	Distilling use
Winter varieties – Full Approval <i>Pearl, Flagon</i>	Winter varieties – Full Approval <i>None Approved for distilling use</i>
Winter varieties – Provisional Approval 2 <i>Cassata</i>	
Spring varieties – Full Approval <i>Optic, Cellar, Cocktail, NFC Tipple</i>	Spring varieties – Full Approval <i>Optic, Cocktail, Decanter, Troon, Oxbridge, Appaloosa</i>
Spring varieties – Provisional Approval 2 <i>Westminster</i>	
Spring varieties – Provisional Approval 1 <i>Quench</i>	Spring varieties – Provisional Approval 1 <i>Publican, Tartan (grain distilling only)</i>

Variety profiles

Pearl (Nickerson (UK) Ltd.)

Over 75% of the winter malting barley purchased from harvest 2006 was *Pearl*. A moderately late variety with acceptable lodging resistance and good resistance to mildew and *Rhynchosporium*. Moderately susceptible to net blotch.

Flagon (New Farm Crops, Syngenta Seeds Ltd.)

In its first season with Full Approval for brewing use, *Flagon* accounted for almost 10% of the winter malting barley purchased from harvest 2006. It gives 3% higher yields than *Pearl* with good overall disease resistance. It offers the maltster higher extracts than *Pearl* with improved processing.

Cassata (Nickerson (UK) Ltd.)

Having successfully completed micromalting trials and limited commercial trials from crop 2006, *Cassata* is listed at Provisional Approval 2 for brewing use. It produces malt of quality similar to *Pearl* and provides the grower with the benefit of resistance to barley yellow mosaic virus resistance, in addition to yield equivalent to *Flagon* and 3% higher than *Pearl*.

Optic (New Farm Crops, Syngenta Seeds Ltd.)

Over 50% of Spring malting barley purchased in the UK from harvest 2006 was *Optic*. It has later maturity and is susceptible to brackling and *Rhynchosporium*. It has a tendency not to accumulate nitrogen. Very useful to maltsters as it makes malt suitable for UK brewing, export brewing and distilling.

Cellar (New Farm Crops, Syngenta Seeds Ltd.)

Approximately 33,000t were purchased from harvest 2006, mainly in England. It gives 2% more yield than *Optic*, is earlier in maturity and has excellent resistance to mildew. It has poor resistance to *Rhynchosporium*. It offers maltsters ease of malt processing and high extracts for brewers.

Decanter (Nickerson (UK) Ltd.)

Approximately 69,000t purchased from harvest 2005, all in Scotland. It is of particular interest to distillers for malting because of its good starch

degrading enzyme levels. High nitrogen *Decanter* barley is used to make grain whisky malt.

Cocktail (New Farm Crops, Syngenta Seeds Ltd.)

Over 229,000t were purchased from harvest 2006 and *Cocktail* availability exceeded that of *Optic* in England. It has shown a 7% yield advantage over *Optic* in HGCA trials. Like *Optic*, it tends to produce low nitrogen. It is shorter than *Optic*, resists brackling and has good ear retention. It is potentially weak for yellow rust.

Troon (Nickerson (UK) Ltd.)

Approximately 23,000t were purchased from harvest 2006, predominately in Scotland where it will be used for the production of malt whisky. Its yield exceeds *Optic*, but it gives plumper grain and lower screenings. It has average length straw and maturity, but is vulnerable to *Rhynchosporium* and *Ramularia*.

Oxbridge (Nickerson (UK) Ltd.)

Oxbridge accounted for over 40,000t of the Scottish Spring barley harvest in 2006. It provides malt of good quality for distilling use with excellent spirit yield potential. It has yield slightly behind *Cocktail*, but 3% above *Troon*. It had good overall disease resistance and stiff straw of medium length.

NFC Tipple (New Farm Crops, Syngenta Seeds Ltd.)

Approximately 23,000t of *NFC Tipple* were purchased from harvest 2006, but that figure is anticipated to increase rapidly from harvest 2007 onwards. It provides malt of good all-round quality, suitable for brewing. It has yields 2% above *Cocktail*. It has very short stiff straw with good resistance to mildew and brown rust, but is susceptible to yellow rust and *Rhynchosporium*.

Appaloosa (Nickerson (UK) Ltd.)

Having successfully completed commercial-scale malting and distilling trials from crop 2006, *Appaloosa* has been awarded Full Approval for distilling use. It provides malt of good quality for malt whisky distilling with low glycosidic nitrile potential. It has yield 9% above *Troon* in the north-east region with stiff straw and resistance to brackling. It is resistant to mildew, but susceptible to *Rhynchosporium*.

Westminster (Nickerson (UK) Ltd.)

As further trial data from 2006 crop is awaited *Westminster* remains at Provisional Approval 2 for brewing use. It provides good quality malt for brewing use with high extract potential. It has long but stiff straw and excellent resistance to *Rhynchosporium* and mildew. It is susceptible to yellow and brown rust.

Quench (New Farm Crops, Syngenta Seeds Ltd.)

Having successfully completed micromalting trials from crop 2006, *Quench* is listed at Provisional Approval 1 for brewing. It provides malt of good all-round quality for brewing use. It has yield 3% above *NFC Tipple* and 5% above *Cocktail* with stiff straw and good resistance to brackling. It has excellent resistance to mildew, good resistance to *Rhynchosporium*, but is susceptible to the rusts.

Publican (New Farm Crops, Syngenta Seeds Ltd.)

Having successfully completed micromalting trials from crop 2006, *Publican* is listed at Provisional Approval 1 for distilling. It provides malt of good quality for distilling use with glycosidic nitrile potential equivalent to *Optic*. It has stiff straw and moderate resistance to brackling. Disease resistance is mixed with excellent resistance to mildew and *Rhynchosporium*, but is susceptible to yellow rust.

Tartan (Nickerson (UK) Ltd.)

Tartan was not added to the HGCA Recommended List, but has successfully completed IBD micromalting trials and is listed at Provisional Approval 1 for specific use for grain distilling. It has good starch-degrading enzyme levels, making high-nitrogen *Tartan* barley suitable for grain distilling malt. It has 4% higher yield than *Decanter* in the north. It has very stiff straw that is resistant to brackling. It has early ripening and good mildew resistance, but is susceptible to *Rhynchosporium*.

For full details of all malting barley purchases (Scotland and England) visit www.ukmalt.com

For full information on the agronomic characteristics and performance of varieties visit www.hgca.com