

Exploring technical insights for Australian barley

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Content

- Increasing value for customers of Australian barley
- In-market research projects
- Where to and what's next



Increasing value for customers of Australian grain



Gathering, analyse and sharing market insights with the Australian grains industry

We provide:

- technical training
- in-market support and education
- innovation advances
- collaborate research projects



Why we do this research?

Increasing value for growers through information that assists:

- Pre-breeding investment for quality attributes
- Identification of breeding targets
- The classification of varieties for maximum use and potential
- Meeting customer quality requirements; and
- Future research and innovation.



Market insights

Vietnam

India

Project: GRDC AEG00006



Major markets for

Australian barley

Total \$1.8 billion 6.6 million tonnes

Sources: Export data: ABS (2016-2018 average)
Domestic use data: ABARES, Barley Australia
\$ = AUD



In-market study

Understanding barley quality,
functionality and support service
requirements of the
India and Vietnam barley market
—
discrete choice analysis



Method: Discrete Choice Analysis



- Survey technique was developed for market research and now used widely to **understand consumer behaviour**
- Better understand the **choices consumers**
- Prioritise the key factors which effect **consumers decision** making
- Understand how buyers would **respond** to **changes** in specific product attributes

Method: Discrete Choice Analysis

- Study questions are posed in a statistically balanced design
- Aims to get the real answer by asking the same question, different ways
- Not previously attempted within the global malting and brewing industry



Ranked 30 attributes – based on importance

- Economic
 - Barley quality
 - Malt quality
 - Malt processing
 - Beer quality
 - Technical services
-
- *Separate studies for purchasers & technicians*
 - *Glossary provided*

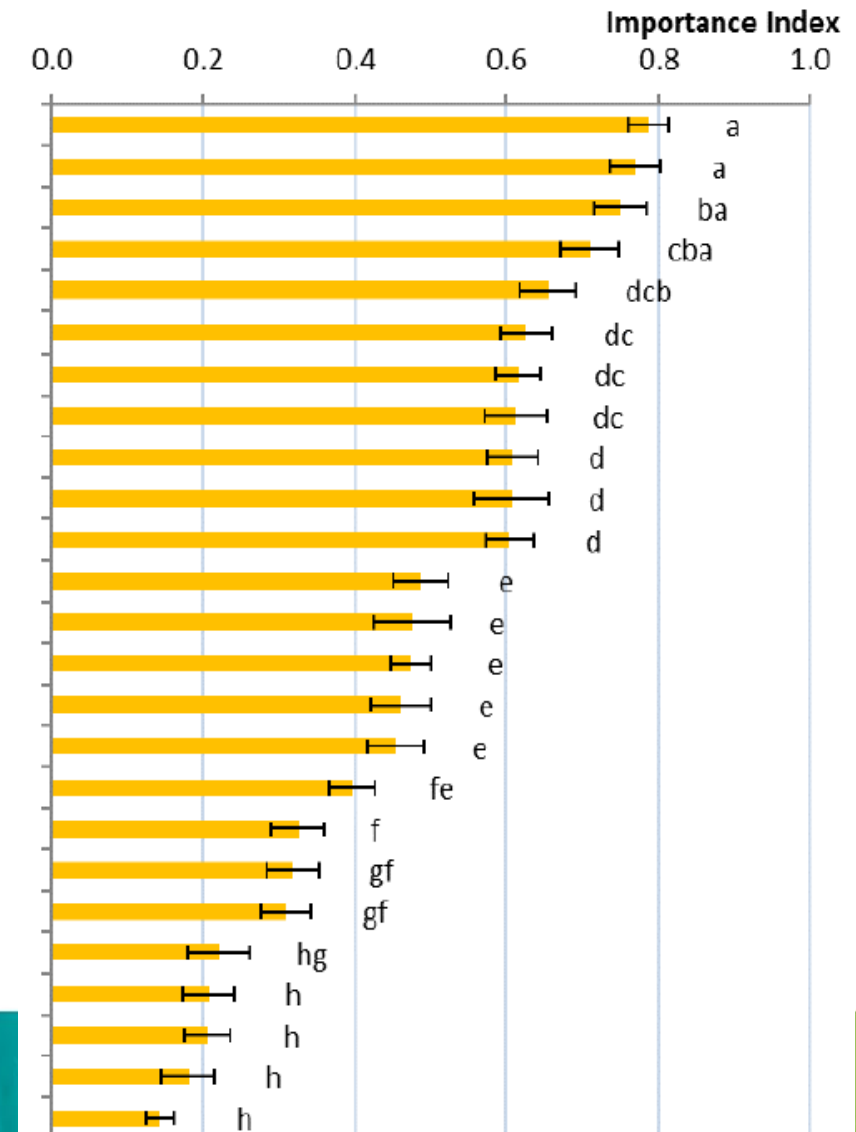


Supporting the use of Australian malting barley

- Understanding the quality requirements and preferences of maltsters and brewers



Attributes
Eg protein, FAN,
beer foam



Survey results

- All customer supplied information is aggregated and **confidential**
- **GRDC** – national peak industry body for Australian grain research and primary funder of this research
- **Barley Australia** – Peak industry body who manage and co-ordinate release of barley varieties suitable for malting



2019 Australian Barley Technical Conference - China



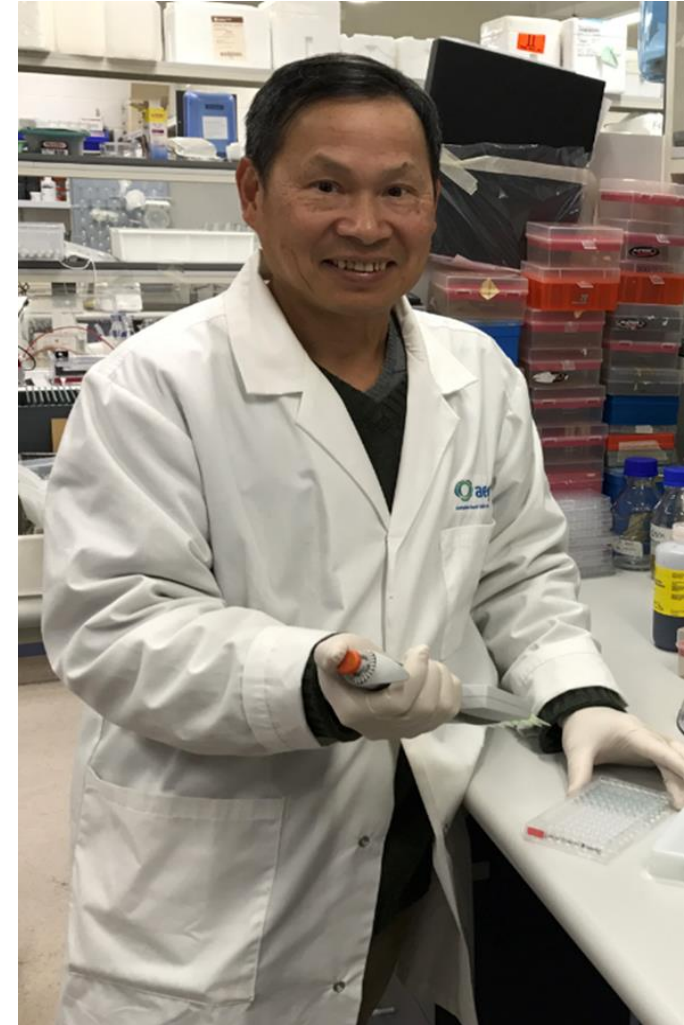
- Landscape of Australian barley industry
- Recently released accredited malting barley varieties.
- Technical research and advances in malting and brewing
- Sharing innovation
- Grower session
- Industry panel session



Collaborative international study – Tsingtao Brewery

Using barley protein more efficiently

Dr Qisen Zhang
Barley Malting Quality Research Biochemist
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Thank you for your time
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