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E-Malt raises global barley supply forecast to 156.2 million tonnes

A record Australian harvest estimate of 18.1 million tonnes could ease procurement pressure for maltsters and brewers

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Global barley supply has been revised up to 156.2 million tonnes, supported by a record crop forecast in Australia of 18.1 million tonnes, according to an E-Malt report published on Friday, November 20.

The publication said the higher global supply outlook reflects the stronger Australian harvest estimate. It did not provide more detail in the publicly available summary on changes in other producing countries or on the size of the previous global estimate.

The revision is important because Australia is a major source of barley in world trade. A larger Australian crop can add exportable volume to the market and help offset tighter conditions elsewhere if demand remains steady. In global grain markets, changes in output from one large exporter can quickly influence supply expectations, trade flows and buying decisions by importers.

Barley is used widely for animal feed, but it is also a key raw material for malt production. That makes the supply outlook relevant for breweries, distillers and maltsters, which depend on steady access to good-quality grain. If more barley is available, procurement conditions for malt producers could improve and pressure on input costs for brewers could ease. Any effect on prices, however, will also depend on freight costs, exchange rates, regional demand and, most importantly, how much of the crop meets malting specifications rather than feed-grade standards.

The distinction matters because not every tonne harvested is suitable for beer production. Maltsters buy barley with specific protein levels, germination quality and kernel characteristics. A large crop can increase total supply, but the benefit for the beverage sector is stronger when a meaningful share of that crop is fit for malting. Weather during harvest, storage conditions and logistics can still affect how much grain reaches that standard.

The E-Malt update points to a market that is becoming more comfortable on paper after Australia’s outlook improved. Even so, grain balances can change quickly as harvest data is finalized and exporters begin shipping volumes into international markets. Importers and processors usually look beyond headline crop numbers to assess how much usable grain will actually be available over the marketing year and where it will be priced competitively.

For brewers, the global barley outlook is one part of a broader raw-material picture that also includes malt conversion costs, energy prices, packaging expenses and consumer demand. Still, barley remains one of the most important agricultural inputs in beer

production, so any increase in world availability is closely watched across the drinks supply chain. Larger supply can reduce the risk of shortages, but it does not automatically translate into immediate savings for manufacturers.

The report’s update adds to the focus on Australia’s role in setting the tone for barley markets this season. With the country now expected to harvest 18.1 million tonnes, buyers of feed barley and malting barley alike are likely to monitor crop quality, export pace and competition from other origins as they judge how far the larger crop will reshape global supply conditions.