

Propino provides pan-European promise

A new spring barley variety offering high quality potential for end users and great yield and agronomics for growers is attracting interest.

In the space of one month, in December 2009, the new spring malting barley variety **Propino** passed two major milestones – and in two major European countries.

Not only was it added to the HGCA Recommended List in the UK, but also listed for the whole of Germany by the official body, the BSA (Bundessortenamt).

These achievements were in addition to quality results so far which suggest **Propino** has a promising future. In the UK it is already under test for brewing by the Institute of Brewing and Distilling. In Germany it has recently been accepted into industrial pilot testing of the Berliner Programm.

“**Propino** could be our next pan-European variety,” says Syngenta Seeds global malting barley business manager, Robert Hiles. “It combines very high yields with excellent



Propino combines very high yields with excellent quality, says Robert Hiles

quality results – including high hot water extract and good processability.

“It also has an excellent disease resistance profile – including Rhynchosporium and mildew – which contributes to its high untreated yield. Essentially it could provide all the benefits of **NFC Tipple** and with improved Rhynchosporium resistance. Also it has good resistance to brackling, together with low screenings or sieving losses, and is earlier maturing than **Quench** and **NFC Tipple**, which can help growers to spread harvest workloads.”

Initially, says Mr Hiles, development of **Propino** has been focused on the UK, Germany and

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Propino Quality	Propino Agronomics	Propino Yield
<ul style="list-style-type: none"> • Very good all-round balanced quality profile <ul style="list-style-type: none"> • High hot water extract • Good DP and SNR • Low beta glucan • High friability • Large grain size 	<ul style="list-style-type: none"> • Good resistance to lodging and brackling • Good straw length • Early maturity • Good resistance to key diseases 	<ul style="list-style-type: none"> • High yield across numerous countries <ul style="list-style-type: none"> • High treated yield • High untreated yield

► Propino promise

Denmark. However registration, testing or commercialisation is also expanding much wider across Europe – including Holland, Ireland and Spain – and even into Canada and South America.

“In Germany, **Propino** has delivered very high yields coupled with good grading and an earlier maturity than **Quench**, signalling a very promising future for the variety. In Spain it has yielded well over 6 t/ha.

“In the UK it has the top UK treated yield figure among spring malting barley varieties on the HGCA Recommended List of 108%* – which is 1% above **Quench**.”

* Data from the HGCA Recommended Lists database, full data at www.hgca.com

Propino registration, testing or commercialisation



Better future for barley?

Spring malting barley may have had a difficult time after last season's increased plantings coincided with reduced beer consumption. But there is scope for optimism, industry experts suggest.

“From an end market perspective, the fundamentals of a growing world population are still in place,” says Robert Hiles.

“By 2050, world population is predicted to rise by about a third to 9 billion people. So the longer term outlook for beer consumption should still be positive. For 2010, there is also a football world cup. This could well help patterns of beer consumption,” he adds.

From a crop area viewpoint, agricultural research economist Graham Redman of Andersons in the UK, points out that in a crop production cycle, high harvest tonnages and depressed prices are followed by less drilling and lower tonnage from the next crop.

Much winter wheat has been planted

this season, he says, which implies the barley area will fall; leading to reduced crop production by countries such as the UK, Denmark and Germany.

If this happens, there is a possibility that quality malting barley availability could fall, adds Robert Hiles, which buyers may well need to take into account.

Also, although the economic downturn isn't likely to correct itself overnight, beer consumption may be starting to rise again by autumn 2010, Mr Redman suggests.

For growers, it should also be remembered that there can be additional benefits from including spring barley in rotations, Mr Redman adds.

As examples, he says its different drilling time to other crops allows overheads to be spread. Also, including additional crops such as spring barley is a way of managing risk.

“Adding a new crop into a rotation builds it into the marketing portfolio.



Agricultural research economist, Graham Redman

This means it spreads risks of sharp movements in single crop markets.

“Weather risk is also spread. If the entire farm's crop is ready for harvest in the same week or fortnight it will all be exposed to quality damage from rain in that period. Including another crop means some may be safely harvested before that critical week.”

Quench and NFC Tipple celebrate top positions



There may be a lot of talk about 'pan-European' barley. But the industry clearly believes in such varieties, new seed figures suggest.

It's been said before that pan-European varieties suitable for growing across multiple countries have been an important development for growers and end users.

And that certainly seems to be the case judging by the success of **NFC Tipple** and **Quench**. Both have grown hugely in European popularity over recent years – with both now popular in Denmark, Germany, Sweden, Holland, Spain and Finland, as well as the UK.

But perhaps nowhere is the interest in **Quench** and **NFC Tipple** better illustrated than in seed statistics published by the European Brewery Convention (EBC) towards the end of last year.

These figures showed that they ranked as the top two varieties for seed multiplication area across 10 key European countries during 2009. According to Syngenta Seeds head of product development, Simon Phillips, this underlines the European support that they have.

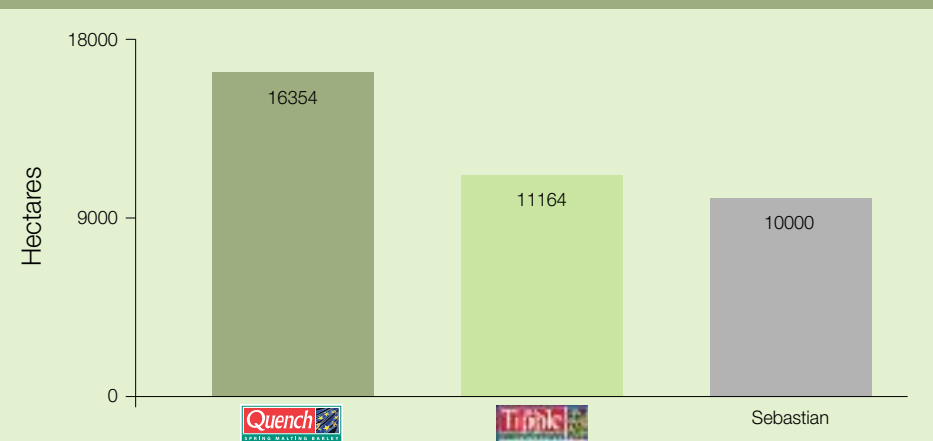
"As key brewers and maltsters merge and consolidate at a global level, we believe that consistency of supply of a handful of key varieties, which can be sourced from different territories, will continue to be crucial," says Mr Phillips.

"Also for farmers, varieties which not only offer high yield but which also have the reassurance of good end market appeal could be essential to maintain interest in growing the crop.

"If you are a grower, how better to

maximise your end market prospects, than to grow varieties which are used for brewing not only in your own country but also for export?" he adds.

Top three spring malting barley varieties for European seed multiplication 2009*



*Source: Multiplication hectareage data from European Brewery Convention (EBC) two years variety summary report 2007/2008. Countries included: DK, SE, IE, UK, DE, FR, AT, CZ, SK, IT with the 10 largest varieties for each country included in the sum.

End user view

Hermann Mayerle, brewmaster at Haller Löwenbräu, Germany

"Haller Löwenbräu is a family business. We produce 12 different beers – our prime product is 'Edel Pils'. Long and cold storage is a special quality feature of our beer.

"For Syngenta, we have produced a special beer brewed only with malt from **Quench**, distributed as a giveaway to customers. The clean batch showed no difference in processing concerning lautering and turbidity compared to the standard, and fermentation proceeded in the usual timeframe. Finally we tasted the **Quench**-Edel Pils in comparison to the conventional Edel Pils. We could not find any significant differences. An important insight from this use of **Quench** was production without any technical or technological changes."

European field visits

Looking to stay up-to-date with Syngenta variety developments? There will be several opportunities to meet our commercial and product development teams during the summer months – at various field visits taking place throughout Europe. These will replace our European Conference this year, owing to budget restrictions which parts of the industry may be facing at present.

Focus on Spain and Portugal



Spain and Portugal are important and potentially expanding markets. But the correct varieties are key.

There is little doubt that Spain is a successful country for malting and beer production. As far back as 2007 Spain was the third largest producer of beer in the EU, producing 34.3 million hectolitres.

Over recent years there has also been substantial success for Syngenta malting barley varieties in Spain – with market share of the malting sector increasing from 0% in 2001 to around 60% in 2008/09, and predicted to reach above 70% soon.

Key success factors have been good performance of varieties – including good malting quality, high yield potential and good disease resistance – and working closely with licensee partners.

Pewter has been the main Syngenta variety in Spain, and is the number one malting variety – as well as being second in absolute tonnes of certified seed of all barley varieties in



As well as Pewter, Quench is also making a strong entrance into Portugal and Spain

Spain. It has been a success because although it is a spring variety, it is suitable for winter planting and competes on yield with the best feed barley varieties.

In 2008, its market share nearly doubled and it grew even further in 2009.

Additionally, **Quench** also had a strong entrance into the market in 2007, and grew well in 2008 and 2009. The Spanish Maltsters Association Barley Recommended List 2008-2010 features only eight varieties, and **Pewter** and **Quench** now account for two of the three 'Variedades Preferidas'. Another Syngenta variety, **Clarion**, is already

accepted for malt contracts and may soon be on the list too.

Portuguese potential

Portugal is normally an importer of barley for malt – mainly from France and Spain – but there is strong incentive for local production. The total Portuguese contracted crop accounts for only about 70% of its total needs.

So far, **Pewter** is the most popular variety and is among the varieties recommended in 2009/10.

However, **Quench** and **Publican** are also making a strong entrance into the Portuguese market. They are under second phase study, with some contracting allowed in 2009/10.



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