



North American Crop Report

October 5, 2026

RahrBSG®



North American Crop Outlook

A large crop does not guarantee abundant malt-quality barley.
2026 is creating a smaller, more regional pool of selectable supply.

RISK

Saskatchewan's 18% malt-grade share and Manitoba's late-harvest downgrades point to a tighter pool of selectable barley.

MARKET

Reduced malt suitability may support quality premiums, while downgrades add to feed supplies.

QUALITY

Individual lot testing determines whether barley meets malting requirements and expected this year to be a smaller pool.

WATCH

Watch final harvest quality, regional availability and winter water conditions.

Weather exposure varies by region. Final quality determines the usable malting barley supply.

North American Crop Quality

Quality problems are highly regional — and some sourcing sheds are more exposed than others.

18%

of Saskatchewan barley graded malt vs.
31% 10-year average

FEED

Much of recently harvested Manitoba and
Saskatchewan barley downgraded after
rain

REGIONAL

Quality and weather exposure vary across
North American growing regions.

What this means

- A large crop can still produce a tight pool of barley that meets malt specifications.
- Late rain increases risk of pre-harvest sprouting, weathering, color loss and lower test weight — all of which will reduce selectable malt supply.
- When local quality breaks down, regional maltsters will have to reach farther for quality barley, increasing competition for the best lots.
- Lot-level testing remains important when quality varies between regions.

Canadian Harvest Quality

Wet harvest conditions have increased quality risk in later-harvested areas.

Regional Variation

Barley quality varies by region and harvest timing. Earlier-harvested fields generally faced less weather exposure.

Late Harvest Risk

Wet conditions can increase sprouting, weathering and moisture concerns in late-harvested barley.

Malting Suitability

Germination and other quality tests determine whether barley meets malting requirements.

Final malt suitability depends on individual lot quality and harvest conditions.

The market is confirming the quality squeeze

A large global crop is not the same as abundant selectable malt barley.

154.7M

Global Crop '26 barley production

QUALITY

Malting suitability drives availability

TIGHTER

Two-row malt availability

What are we seeing?

- Wet conditions across Canada and the northern U.S. interrupted an otherwise strong crop and created a dramatic harvest-quality setback.
- Regional quality losses can reduce malting suitability and shift more grain toward feed.
- Wet harvest conditions may support quality premiums for sound malting barley.
- Global barley supply is larger, but selectable malting barley has declined — and even a near-record Australian crop does not fully remove North American quality pressure.

IMPLICATION

Crop volume alone does not determine malt availability. Final quality and delivery conditions matter.

Global backstop: Other barley producing countries including a near-record Australian crop add supply options, but replacement barley still carries freight, execution and timing risk.

AAFC: Canada has volume — but harvest timing is raising quality risk

Agriculture and Agri-Food Canada's Sept. 25 outlook reinforces the regional quality-risk story in Western Canada.

9.7M MT

2026 Canadian barley production

Essentially unchanged from 2025-26.

10.8M MT

2026-27 total barley supply

Down from 11.1M MT as carry-in stocks decline.

93%

Barley grown in AB + SK

Alberta 53% • Saskatchewan 40% • Manitoba 5%.

What AAFC is seeing

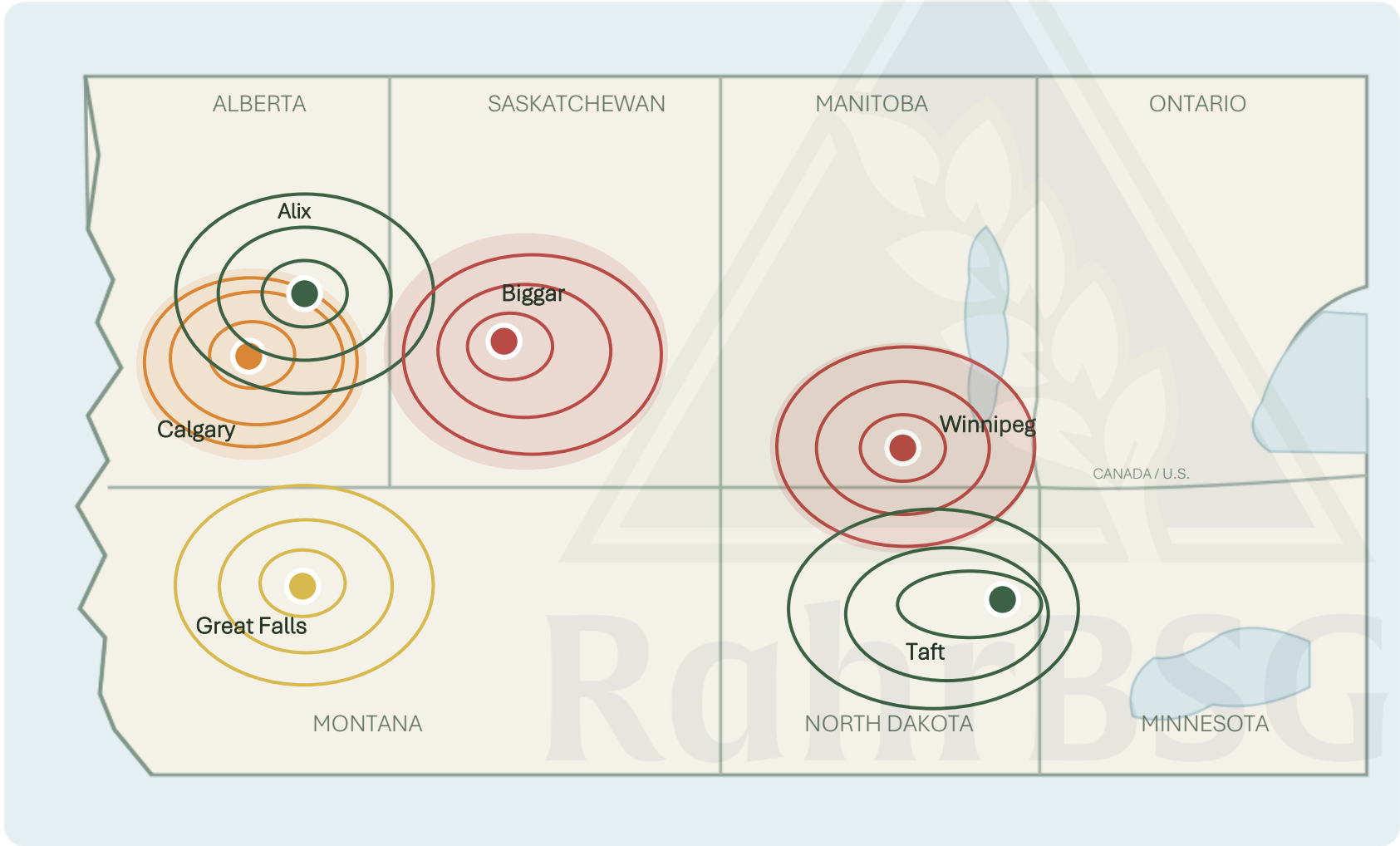
- Western Canadian harvest is significantly behind both last year and the five-year average after widespread rainfall delayed fieldwork.
- AAFC says the impact of harvest delays and weather on crop quality will become clearer as Canadian Grain Commission harvest samples build.
- Lower carry-in stocks reduce the old-crop cushion even though new-crop barley production is near last season.
- Barley supply is concentrated: Alberta and Saskatchewan account for 93% of Canadian production, keeping Prairie harvest conditions highly relevant.

IMPLICATION

Production forecasts measure crop volume.
Harvest quality determines the share suitable for malting.

Sourcing Exposure

Where 2026 weather and quality risks overlap malt plant footprints



Where to watch

HIGH

Saskatchewan

Central SK quality pressure is directly relevant to the plant in the heart of the barley growing region.

HIGH

Manitoba

Wet late harvest in Manitoba is creating documented sprout, color and test-weight downgrades.

MEDIUM

Alberta

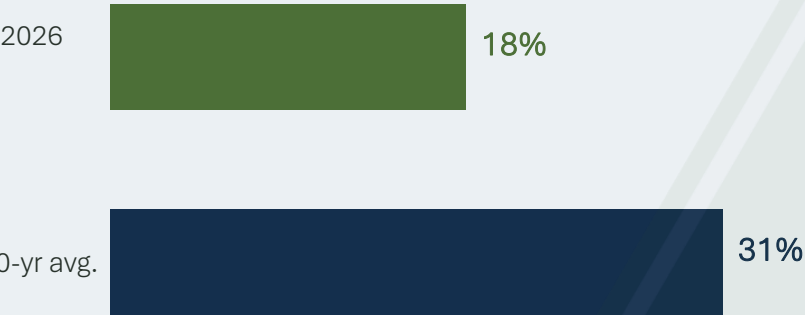
Alberta risk is more regional; central/southern barley less affected.

● Minimal ● Localized ● Elevated

Saskatchewan: Clearest documented malt-quality squeeze

Share of barley grading malt

2026 vs. 10-year average



13 percentage points below the 10-year average
(about 42% lower)



- Saskatchewan harvest was only 32% complete on Sept. 14; barley was 47% harvested.
- Widespread rain stalled harvest. Some locations received 80–97 mm during the reporting period.
- Barley quality: 18% malt, 53% 1 CW and 29% 2 CW — materially weaker malt share than normal.
- Weather-related downgrades may reduce the share of barley suitable for malting.

IMPLICATION

The issue is not “is there barley?” — it is how much barley still meets malt specifications.

Manitoba: late-harvest quality is breaking down

Recent rainfall has increased sprouting, weathering and downgrade concerns.

76%

Manitoba barley harvested by Sept. 21

70%

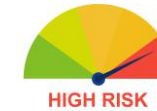
Southwest barley harvested

30%

Northwest barley harvested

What the Manitoba report says

- Earlier harvested cereal quality was good. More recently harvested fields show sprouting and weathering downgrades.
- In Southwest Manitoba, barley quality decreased after recent rains. Downgrades were tied to sprouting, colour and low-test weight.
- The provincial report says much of that recently harvested crop was grading as feed.
- The Southwest received up to 77.8 mm of rain in the seven-day period ending Sept. 20.



Potential sourcing consequence

When local malt-quality availability tightens, Winnipeg-area malt demand could reach farther west for clean barley — increasing competition for quality lots in Saskatchewan and Alberta.

Alberta: quality risk is regional — not a province-wide failure

Harvest timing and weather exposure influence malting suitability.

Regional Quality Factors

- Harvest conditions vary across central, southern and northern Alberta.
- Earlier-harvested areas generally faced less late-season weather exposure.
- Germination, moisture and other quality tests determine malt suitability.

Malting suitability depends on the quality of individual lots.

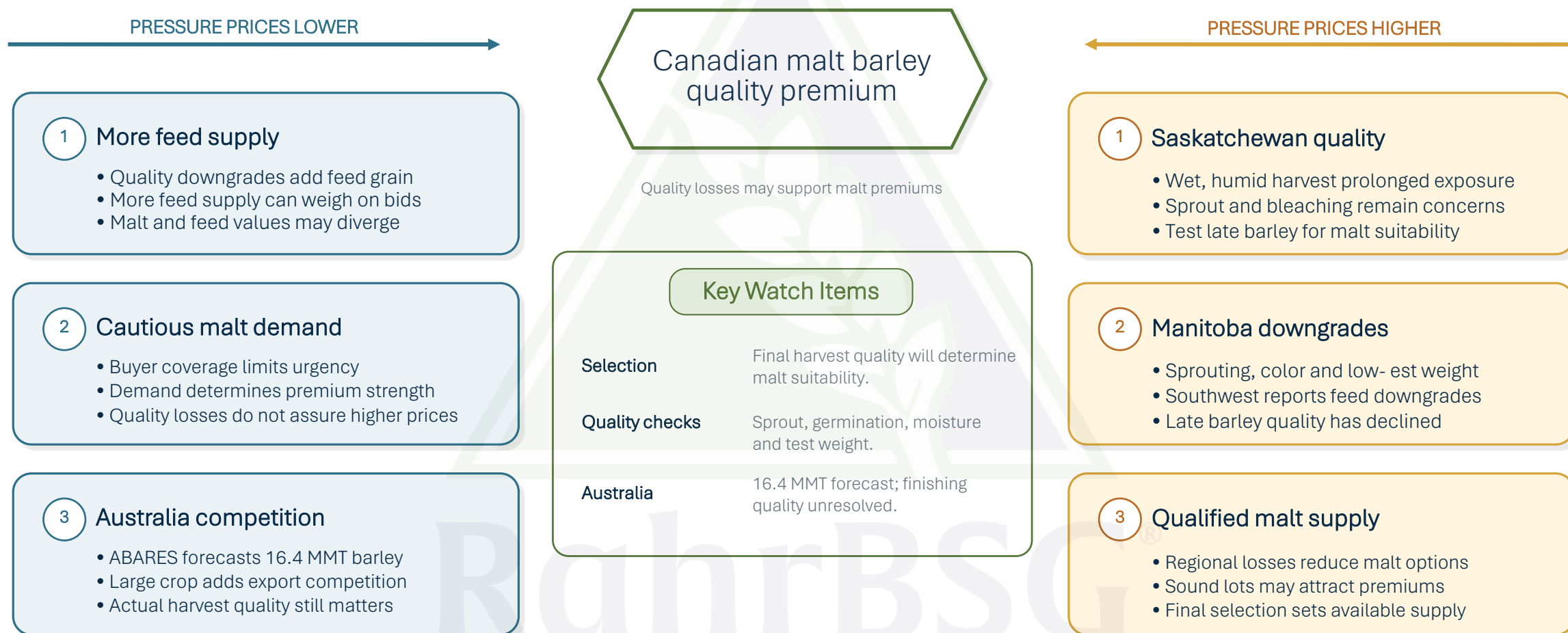


- Wet harvest conditions and delayed maturity have raised regional sprout and quality risk across the Prairies.
- Quality can vary considerably between regions and individual fields.
- Northern/wetter and later-maturing areas remain the greater concern.

The likely dynamic

More buyers competing for the best barley from the better-performing areas.

Canadian Barley Outlook — Quality and Price Balance



Takeaway:

Regional quality losses may support malt premiums, while downgrades add to feed supply.

Alcohol restrictions are active; barley is outside the Section 338 list

CURRENT POLICY

U.S. import bans began Sept. 29 for covered Canadian alcohol products. Grain barley and malt are not on the Section 338 tariff list.

50%

Active U.S. tariff on covered goods, not barley

1

Barley and malt are not listed

The Sept. 15 Section 338 list excludes HS 1003 barley and HS 1107 malt.

2

Alcohol restrictions are now active

Covered Canadian alcohol products are barred from U.S. entry from Sept. 29; scope varies by product and packaging.

3

Canadian response is targeted

Sept. 8 counter-tariffs cover selected U.S. goods. Barley is absent from the new Canadian list.

Barley Trade and Demand Watch



Closely Monitoring

Demand is the near-term risk; grain policy remains a watch item

DIRECT BARLEY TRADE

Outside Section 338

- Barley and malt are not on the list
- No blanket 50% barley assumption
- Shipment treatment still depends on origin and classification

CUSTOMER DEMAND

Alcohol bans active

- Covered products barred Sept. 29
- Customer export sales may weaken
- Malt demand effects depend on product mix and market access

IF POLICY EXPANDS

Potential grain impact

- A new barley duty could alter flows
- Delivered costs and basis could shift
- Future acreage decisions may change

WATCH POINT

Track tariff lists, demand and cross-border barley costs.
Grain impacts shown here are scenarios, not confirmed outcomes.

United States Harvest Overview

Good overall quality, with localized weather damage in late-harvested areas

Harvest wrap-up

The harvest review indicates good overall barley quality. Regional and variety differences remain important when selecting barley for malting.

Northern Plains quality

Regional summaries indicate approximately 75–90% plump and 11.5–13% protein. Quality differs by growing area and variety.

Localized weather risk

Late rainfall raised sprout concerns in northern North Dakota. Germination and weather damage require close screening in affected lots.

U.S. Northern Plains Harvest Quality

Regional quality watch

75–90%

Plump, approximate range

11.5–13%

Protein, approximate range

TESTING

Lot quality determines suitability

- Regional ranges summarize growing-area quality. Individual lots can fall outside these bands.
- Heavy rain near harvest raised localized sprout concerns in northern North Dakota.
- Late-harvested fields need particular attention to germination and weather damage.

Weather damage can be localized. Regional conditions and individual lot testing provide the clearest quality assessment.

Final malt suitability depends on germination, moisture and other quality requirements.

Idaho's 2027 Barley Acres Depend On Irrigation Supply

WEATHER

2026 Water Deficit

- One of Idaho's lowest snowpacks since 1934
- Snow melted several weeks earlier than normal
- Less late-season runoff reached rivers and reservoirs
- Some southern Idaho deliveries were cut by up to one-third

Why 2027 Remains at Risk

- Irrigation is important to Idaho barley production
- Reservoir carryover affects spring water availability
- Exposure varies by water access
- Winter snowpack remains a key watch item

Potential Acreage Impact

- Water availability influences planting decisions
- Tight allocations may favor higher-value crops
- Barley water needs can influence crop choices
- Spring snowpack and allocations remain important

Idaho's 2027 barley acreage will ultimately depend on whether winter snowpack and reservoir recharge provide growers with sufficient irrigation confidence by spring.

Winter snowpack and reservoir recharge will shape the spring outlook.

Australia: Large Crop, Finishing Risks

Crop Report



Closely Monitoring

- ABARES' September forecast puts 2026–27 barley at 16.4 MMT: down 3% year over year, but 30% above the 10-year average.
- Planted area increased 6%. The forecast provides substantial export supply, although final yield and malting quality are still to be confirmed.
- Conditions vary by region: southern areas retain better moisture, while Queensland and northern New South Wales face greater finishing pressure.
- Hot, dry September reduced soil moisture in much of the east and southwest. The Murray–Darling Basin recorded its second driest September.
- October–December is forecast warmer than average. Rainfall prospects are mixed: wetter in much of the west, drier in parts of the southeast and far north.



MARKET IMPACT — A large Australian crop could constrain Canadian export upside. Malting competition will depend on final harvest quality; heat and moisture stress remain finishing risks.

