Summary of key issues

- During the week ending 20 September 2017 rainfall was restricted to south-eastern, south-western and far north-eastern parts of Australia. Little to no rainfall was recorded across the rest of the country.

- For the week ending 19 September 2017 maximum temperatures were generally close to average across most of Australia with the exception of Western Australia where temperatures were 2°C to 8°C above average.

- Following a particularly dry winter, rainfall totals for September-to-date are currently tracking at less than 20 per cent of the long-term monthly average for September across most of Australia. These dry conditions are likely to further reduce yield prospects for winter crops in central west New South Wales and delay summer crop plantings in northern New South Wales and southern Queensland.

- The impact of dry conditions recorded for September-to-date are likely to be further exacerbated by well above average temperatures forecast on 23 September, with maximum temperatures across most cropping regions in New South Wales and Queensland forecast to reach between 33°C and 39°C. The heat poses a risk for winter crops during the temperature sensitive flowering and grain fill stages of development and is likely to increase moisture stress in crops and pastures.

- For the next eight days, rainfall is expected to be mainly restricted to south-western and south-eastern Australia with little to no rainfall forecast for the remainder of the country.

- Water storage levels in the Murray–Darling Basin (MDB) increased during the week to 21 September 2017 by 58 gigalitres (GL) to 16,903 GL and are at 75 per cent of total capacity. This is 76 GL less than at the same time last year.

- Allocation prices in the southern Murray–Darling Basin fell slightly to $116 per megalitre during the week to 21 September 2017.
1. Climate

1.1. Rainfall this week

During the week ending 20 September 2017 rainfall was restricted to south-eastern, south-western and far north-eastern parts of Australia. Little to no rainfall was recorded across the rest of the country. Rainfall totals between 5 and 50 millimetres were recorded across parts of eastern New South Wales, most of Victoria, parts of northern Queensland, far south eastern South Australia, isolated areas around Perth in Western Australia and most of Tasmania. Rainfall totals exceeded 50 millimetres in western Tasmania, the Latrobe Valley in Victoria, and around Cairns, including the highest recorded weekly total of 215 millimetres at Babinda.

Rainfall for the week ending 20 September 2017

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Note: The rainfall analyses and associated maps utilise data contained in the Bureau of Meteorology climate database, the Australian Data Archive for Meteorology (ADAM). The analyses are initially produced automatically from real-time data with limited quality control. They are intended to provide a general overview of rainfall across Australia as quickly as possible after the observations are received. For further information go to http://www.bom.gov.au/climate/rainfall/
1.2. Temperature anomalies this week

During the week ending 19 September 2017 maximum temperatures were generally close to average across most of Australia with the exception of Western Australia where temperatures were 2°C to 8°C above average. Minimum temperatures ranged from below average (-2°C to -6°C) in northern Australia and isolated parts of eastern Australia to above average (2°C to 6°C) in Western Australia.

Maximum temperature anomalies for the week ending 19 September 2017

Minimum temperature anomalies for the week ending 19 September 2017

Note: Spatial temperature analyses are based on historical weekly temperature data provided by the Bureau of Meteorology. These temperature anomaly maps show the departure of the maximum and minimum temperatures from the average over the 1961 to 1990 reference period. For further information go to:
1.3. Monthly rainfall to date

Following a particularly dry winter across much of eastern and southern Australia, rainfall totals for September-to-date (1 to 20 September) are current tracking at less than 20 per cent of the long-term monthly average for September across most of Australia. The areas of exception include the Gascoyne region and southern coastal parts of Western Australia, South Australia and Victoria where month-to-date totals either exceed or are close to the September average. Month-to-date rainfall is also close to average in far northern Queensland and western Tasmania.

The continued dry conditions are particular evident across New South Wales and Queensland. This is likely to lead to further reduced yield prospects for winter crops in central west New South Wales and delay summer crop plantings in northern New South Wales and southern Queensland.

Rainfall percentages 1 to 20 September 2017

The impact of dry conditions recorded for September-to-date are likely to be further exacerbated by well above average temperatures forecast on 23 September, with maximum temperatures across most cropping regions in New South Wales and Queensland forecast to reach between 33°C and 39°C. This is in excess of 10 degrees above average maximum for many parts of the state. The heat poses a risk for winter crops during the temperature sensitive flowering and grain fill stages of development and is likely to increase moisture stress in crops and pastures.

Forecast maximum temperature 23 September 2017
1.4. **Seasonal bushfire outlook 2017**

On 5 September 2017, the Bushfire & Natural Hazards Cooperative Research Centre (CRC) released the *Southern Australia Seasonal Bushfire Outlook 2017*. It reports that large parts of the country face above normal bushfire potential for the fire season due to a combination of above average temperatures and below average rainfall from May to August 2017. In addition, the outlook for warmer spring conditions suggest that the southern fire season is likely to commence earlier than usual and be more active than normal.

For further information, visit http://www.bnhcrc.com.au

*Southern Australia seasonal bushfire outlook 2017*

Source: Bushfire and Natural Hazards CRC, *Southern Australia Seasonal Bushfire Outlook 2017*, 5 September 2017
1.5. **Rainfall forecast for the next eight days**

Rainfall is expected to be mainly restricted to south-western and south-eastern Australia during the next eight days with little to no rainfall forecast for the remainder of the country. Totals between 5 and 100 millimetres are forecast for south-western Western Australia with totals exceeding 100 millimetres in far southern parts. Totals between 5 and 25 millimetres are expected in alpine regions of New South Wales, southern and eastern Victoria, and the far south of South Australia. Similar totals are forecast for most of Tasmania, with higher totals on the west coast (50 to 150 millimetres).

This rainfall forecast is produced from computer models. As it contains no input from weather forecasters, it is important to check local forecasts and warnings issued by the Bureau of Meteorology.

**Total forecast rainfall (mm) for the period 21 to 28 September 2017**

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Issued: 21/09/2017
2. Water

2.1. Water availability

Water storage levels in the Murray–Darling Basin (MDB) increased during the week to 21 September 2017 by 58 gigalitres (GL) to 16,903 GL and are at 75 per cent of total capacity. This is 76 GL less than at the same time last year.

Information on water available in dams used for irrigation the Murray–Darling Basin from 1 January 2001 to 21 September 2017 is shown above. The top horizontal (short dash) line indicates the storage level during a similar time last year. The bottom horizontal (long dash) line indicates the amount of ‘dead’ or unusable storage.
### 2.2. Water allocations

The NSW DPI - Water on 15 September 2017 announced allocation increases of:

- 4% for NSW Murrumbidgee general security to 33%
- 8% for NSW Murray general security to 28%

The Resource Manager for Northern Victoria on 15 September 2017 announced seasonal determination increases of:

- 9% for Victoria Broken high reliability to 36%
- 9% for Victoria Campaspe low reliability to 16%
- 11% for Victoria Goulburn high reliability to 71%
- 11% for Victoria Loddon high reliability to 71%
- 8% for Victoria Murray high reliability to 98%

<table>
<thead>
<tr>
<th>New South Wales</th>
<th>21 September 2017</th>
<th>7 September 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>General security</td>
<td>High security</td>
</tr>
<tr>
<td>NSW Murray</td>
<td>28%</td>
<td>97%</td>
</tr>
<tr>
<td>NSW Murrumbidgee</td>
<td>33%</td>
<td>95%</td>
</tr>
<tr>
<td>NSW Lower Darling</td>
<td>100%</td>
<td>100%</td>
</tr>
<tr>
<td>NSW Macquarie and Cudgegong</td>
<td>38%</td>
<td>100%</td>
</tr>
<tr>
<td>NSW Hunter</td>
<td>100%</td>
<td>100%</td>
</tr>
<tr>
<td>NSW Lachlan</td>
<td>2%</td>
<td>100%</td>
</tr>
<tr>
<td>NSW Lower Namoi</td>
<td>7%</td>
<td>100%</td>
</tr>
<tr>
<td>NSW Upper Namoi</td>
<td>100%</td>
<td>100%</td>
</tr>
<tr>
<td>NSW Gwydir</td>
<td>12%</td>
<td>100%</td>
</tr>
<tr>
<td>NSW Border Rivers</td>
<td>100%(a)/11.1%(b)</td>
<td>100%</td>
</tr>
<tr>
<td>NSW Peel</td>
<td>100%</td>
<td>100%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Victoria</th>
<th>Low reliability</th>
<th>High reliability</th>
<th>Low reliability</th>
<th>High reliability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Victoria Murray</td>
<td>0%</td>
<td>98%</td>
<td>0%</td>
<td>90%</td>
</tr>
<tr>
<td>Victoria Goulburn</td>
<td>0%</td>
<td>71%</td>
<td>0%</td>
<td>60%</td>
</tr>
<tr>
<td>Victoria Campaspe</td>
<td>16%</td>
<td>100%</td>
<td>7%</td>
<td>100%</td>
</tr>
<tr>
<td>Victoria Loddon</td>
<td>0%</td>
<td>71%</td>
<td>0%</td>
<td>60%</td>
</tr>
<tr>
<td>Victoria Bullarook</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
</tr>
<tr>
<td>Victoria Broken</td>
<td>0%</td>
<td>36%</td>
<td>0%</td>
<td>27%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>South Australia</th>
<th>Class 3a/3b</th>
<th>Class 3a/3b</th>
</tr>
</thead>
<tbody>
<tr>
<td>South Australia Murray</td>
<td>100%</td>
<td>100%</td>
</tr>
</tbody>
</table>

(a) General Security A class. (b) General Security B class
Select water allocation percentages in the southern Murray–Darling Basin

NSW Murray general security

NSW Murrumbidgee general security

Victorian Murray high reliability

Victorian Goulburn high reliability
2.3. Water markets

Allocation prices in the southern Murray–Darling Basin fell slightly in the week up to 21 September 2017 in most systems. Average prices across the whole southern system decreased slightly to $116 per megalitre. This is a decrease of $5 from the same time last week. This contrasts with an average price of $131 in August across the whole southern MDB.

The trades shown reflect market activity and do not encompass all register trades. The price line reflects locally fitted price values for the entire southern Murray–Darling Basin. Data shown is current until Thursday 21 September 2017. Trade activity is shown as colour density.

| Allocation trade prices, southern Murray–Darling Basin trade zones (price per ML) |
|---------------------------------|---------------------------------|-----------------|-----------------|-----------------|-----------------|-----------------|
|                                 | Southern MDB                    | Victoria Goulburn | SA Murray | NSW Murrumbidgee | Victoria Murray | NSW Murray |
| Current week: 15/09/17 - 21/09/17 | $116.03                         | $99.90            | NA       | $113.18          | $128.49          | $133.36          |
| Last week: 08/09/17 - 14/09/17  | $121.02                         | $102.18           | $168.42  | $118.63          | $129.44          | $127.11          |
| August 2017                     | $131.22                         | $110.09           | $161.23  | $127.58          | $136.86          | $137.07          |
| August 2016                     | $111.61                         | $119.52           | $126.31  | $98.09           | $147.31          | $80.97           |
## 3. Commodities

### Selected World Indicator Prices

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Week ended</th>
<th>Unit</th>
<th>Latest price</th>
<th>Price week prior</th>
<th>Weekly change</th>
<th>Price 12 months prior</th>
<th>Year on year change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australian Dollar – AUD/USD Exchange Rate</td>
<td>20-Sep</td>
<td>US$/A$</td>
<td>0.8</td>
<td>0.8</td>
<td>0%</td>
<td>0.75</td>
<td>7%</td>
</tr>
<tr>
<td>Wheat – US no. 2 hard red winter wheat, fob Gulf</td>
<td>19-Sep</td>
<td>US$/t</td>
<td>218</td>
<td>212</td>
<td>3%</td>
<td>193</td>
<td>13%</td>
</tr>
<tr>
<td>Coarse Grains – US no. 2 yellow corn, fob Gulf</td>
<td>20-Sep</td>
<td>US$/t</td>
<td>145</td>
<td>148</td>
<td>-2%</td>
<td>151</td>
<td>-4%</td>
</tr>
<tr>
<td>Canola – Rapeseed, Europe, fob Hamburg</td>
<td>19-Sep</td>
<td>US$/t</td>
<td>437</td>
<td>430</td>
<td>2%</td>
<td>421</td>
<td>4%</td>
</tr>
<tr>
<td>Cotton – Cotlook 'A' Index</td>
<td>20-Sep</td>
<td>USc/lb</td>
<td>79.2</td>
<td>82.8</td>
<td>-4%</td>
<td>77.4</td>
<td>2%</td>
</tr>
<tr>
<td>Sugar – Intercontinental Exchange, nearby futures, no.11 contract</td>
<td>20-Sep</td>
<td>USc/lb</td>
<td>14.2</td>
<td>14.2</td>
<td>0%</td>
<td>21.7</td>
<td>-35%</td>
</tr>
<tr>
<td>Wool – Eastern Market Indicator</td>
<td>14-Sep</td>
<td>Ac/kg clean</td>
<td>1,525</td>
<td>1,556</td>
<td>-2%</td>
<td>1,311</td>
<td>16%</td>
</tr>
<tr>
<td>Wool – Western Market Indicator</td>
<td>08-Sep</td>
<td>Ac/kg clean</td>
<td>1,600</td>
<td>1,609</td>
<td>&lt;1%</td>
<td>1,407</td>
<td>14%</td>
</tr>
</tbody>
</table>

### Selected domestic crop indicator prices

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Week ended</th>
<th>Unit</th>
<th>Latest price</th>
<th>Price week prior</th>
<th>Weekly change</th>
<th>Price 12 months prior</th>
<th>Year on year change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Milling Wheat – ASW1, track quote, Port Adelaide, SA</td>
<td>19-Sep</td>
<td>A$/t</td>
<td>221</td>
<td>217</td>
<td>2%</td>
<td>210</td>
<td>5%</td>
</tr>
<tr>
<td>Feed Wheat – General purpose, Sydney, NSW</td>
<td>20-Sep</td>
<td>A$/t</td>
<td>248</td>
<td>257</td>
<td>-4%</td>
<td>231</td>
<td>7%</td>
</tr>
<tr>
<td>Feed Barley – Sydney, NSW</td>
<td>20-Sep</td>
<td>A$/t</td>
<td>246</td>
<td>246</td>
<td>0%</td>
<td>178</td>
<td>38%</td>
</tr>
<tr>
<td>Canola – Portland, Vic.</td>
<td>18-Sep</td>
<td>A$/t</td>
<td>508</td>
<td>497</td>
<td>2%</td>
<td>488</td>
<td>4%</td>
</tr>
<tr>
<td>Grain Sorghum – Sydney, NSW</td>
<td>20-Sep</td>
<td>A$/t</td>
<td>314</td>
<td>309</td>
<td>2%</td>
<td>204</td>
<td>54%</td>
</tr>
</tbody>
</table>

### Selected domestic livestock indicator prices

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Week ended</th>
<th>Unit</th>
<th>Latest price</th>
<th>Price week prior</th>
<th>Weekly change</th>
<th>Price 12 months prior</th>
<th>Year on year change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beef – Eastern Young Cattle Indicator</td>
<td>14-Sep</td>
<td>Ac/kg cwt</td>
<td>524</td>
<td>542</td>
<td>-3%</td>
<td>712</td>
<td>-26%</td>
</tr>
<tr>
<td>Mutton – Mutton indicator (18–24 kg fat score 2–3), Vic</td>
<td>15-Sep</td>
<td>Ac/kg cwt</td>
<td>397</td>
<td>401</td>
<td>&lt;1%</td>
<td>410</td>
<td>-3%</td>
</tr>
<tr>
<td>Lamb – Eastern States Trade Lamb Indicator</td>
<td>14-Sep</td>
<td>Ac/kg cwt</td>
<td>597</td>
<td>613</td>
<td>-3%</td>
<td>613</td>
<td>-3%</td>
</tr>
<tr>
<td>Pig – Eastern Seaboard (60.1–75 kg), average of buyers &amp; sellers</td>
<td>01-Sep</td>
<td>Ac/kg cwt</td>
<td>277</td>
<td>277</td>
<td>0%</td>
<td>377</td>
<td>-27%</td>
</tr>
<tr>
<td>Goat – Eastern States (12.1–16 kg)</td>
<td>18-Sep</td>
<td>Ac/kg lwt</td>
<td>466</td>
<td>470</td>
<td>&lt;1%</td>
<td>579</td>
<td>-20%</td>
</tr>
<tr>
<td>Live cattle – Light steers ex Darwin to Indonesia</td>
<td>16-Sep</td>
<td>$/head</td>
<td>330</td>
<td>320</td>
<td>3%</td>
<td>360</td>
<td>-8%</td>
</tr>
<tr>
<td>Live sheep – Live wether (Muchea WA saleyard) to Middle East</td>
<td>18-Sep</td>
<td>$/head</td>
<td>117</td>
<td>113</td>
<td>4%</td>
<td>98</td>
<td>19%</td>
</tr>
<tr>
<td>Indicator</td>
<td>Week ended</td>
<td>Unit</td>
<td>Latest price</td>
<td>Price week prior</td>
<td>Weekly change</td>
<td>Price 12 months prior</td>
<td>Year on year change</td>
</tr>
<tr>
<td>------------------------------------------------</td>
<td>------------</td>
<td>--------</td>
<td>--------------</td>
<td>------------------</td>
<td>---------------</td>
<td>----------------------</td>
<td>---------------------</td>
</tr>
<tr>
<td>Dairy – Whole milk powder</td>
<td>19-Sep</td>
<td>US$/t</td>
<td>3,122</td>
<td>3,100</td>
<td>&lt;1%</td>
<td>2,782</td>
<td>12%</td>
</tr>
<tr>
<td>Dairy – Skim milk powder</td>
<td>19-Sep</td>
<td>US$/t</td>
<td>1,920</td>
<td>1,944</td>
<td>-1%</td>
<td>2,293</td>
<td>-16%</td>
</tr>
<tr>
<td>Dairy – Cheddar cheese</td>
<td>19-Sep</td>
<td>US$/t</td>
<td>4,032</td>
<td>4,118</td>
<td>-2%</td>
<td>3,518</td>
<td>15%</td>
</tr>
<tr>
<td>Dairy – Anhydrous milk fat</td>
<td>19-Sep</td>
<td>US$/t</td>
<td>6,764</td>
<td>6,405</td>
<td>6%</td>
<td>4,998</td>
<td>35%</td>
</tr>
</tbody>
</table>

*Global Dairy Trade (GDT) weighted average prices*

*Global Dairy Trade prices are updated twice monthly on the first and third Tuesday of each month.*
2.4. Selected world indicator prices

World wheat indicator price
US No. 2, hard red winter wheat, fob Gulf
Week ended 19 September 2017

World coarse grains indicator price
US corn No. 2, fob Gulf
Week ended 20 September 2017

World canola indicator price
Europe fob Hamburg
Week ended 19 September 2017

World cotton indicator price
Cotlook ‘A’ index
Week ended 20 September 2017
2.5. Global Dairy Trade (GDT) weighted average prices

- Whole milk powder price
  - 19 September 2017

- Skim milk powder price
  - 19 September 2017

- Cheddar cheese price
  - 19 September 2017

- Anhydrous milk fat price
  - 19 September 2017
2.6. Selected domestic crop indicator prices

- **Grain sorghum indicator price**
  - Sydney, NSW
  - Week ended 20 September 2017

- **Feed barley indicator price**
  - Sydney, NSW
  - Week ended 20 September 2017

- **Feed wheat indicator price**
  - General Purpose, Sydney, NSW
  - Week ended 20 September 2017

- **Milling wheat indicator price**
  - ASW1, track quote, Port Adelaide, SA
  - Week ended 19 September 2017
2.7. Selected domestic livestock indicator prices

- Eastern Young Cattle Indicator
  Week ended 14 September 2017

- Eastern States Trade Lamb Indicator
  Week ended 14 September 2017

- Mutton indicator price in Victoria
  (18–24 kg fat score 2–3)
  Week ended 15 September 2017

- Pig indicator price Eastern Seaboard
  (60.1–75 kg)
  Week ended 1 September 2017
2.8. Movements in selected fruit and vegetable prices – week ended 9 September 2017
3. Data attribution

Climate
Bureau of Meteorology

Water
New South Wales
Queensland
- Sunwater: www.sunwater.com.au
- Seqwater: http://seqwater.com.au
South Australia
- South Australian Department of Environment, Water and Natural Resources: www.environment.sa.gov.au
Victoria
- Goulburn–Murray Water: www.g-mwater.com.au

Commodities
Fruit and vegetables
- Datafresh: www.freshstate.com.au
Pigs
- Australian Pork Limited: www.australianpork.com.au
Canola
- Weekly Times: hardcopy
Dairy
World wheat, canola
- International Grains Council
World coarse grains
- United States Department of Agriculture
World cotton
- Cotlook: www.cotlook.com/
World sugar
- New York Stock Exchange - Intercontinental Exchange
Wool
Milling wheat
- ProFarmer
Domestic wheat, barley, sorghum
- The Land: hardcopy or online at www.theland.farmonline.com.au/markets
Domestic canola
- The Weekly Times: hardcopy
Cattle, beef, mutton, lamb, goat and live export