This week’s report contains an update on the Australian winter crop prospects. See section 1.3 for more detail.

Summary of key issues

- ABARES has conducted a preliminary assessment of the expected impact of the unfavourable seasonal conditions during early spring on Australian winter crop production. We expect 2018–19 winter crop production to be around 15 per cent lower than the previous forecast of 33.2 million tonnes published in the September edition of the Australian Crop Report. See section 1.3.

- Winter crop area devoted to grains and oilseeds production is estimated to have fallen by around 8 per cent because a higher than planned area was cut for hay.

- ABARES is continuing to monitor the progress of 2018–19 winter crops and will publish a more detailed assessment in the December edition of the Australian crop report on 4 December 2018.

- During the week ending 24 October 2018 rainfall was recorded across all states and territories, with the heaviest falls recorded in the north, east, far south and south west of the country.

- In cropping regions, rainfall totals of between 10 and 100 millimetres were recorded in northern and parts of eastern New South Wales and most cropping regions in Queensland. For remaining cropping regions, little or no rainfall was recorded.

- A drier than average November is more likely across most of Australia.

- The rainfall outlook for November 2018 to January 2019 indicates that a drier than average three months is likely for much of Australia. Meanwhile, most of the northern tropics and eastern New South Wales have roughly equal chances of a wetter or drier three months.

- During the next eight days, rainfall is expected to be restricted mainly to the east, centre and far north of Australia.

- In cropping regions, rainfall of between 10 and 50 millimetres is expected across parts of northern New South Wales, much of Queensland and the west of South Australia.

- Water storage levels in the Murray–Darling Basin (MDB) decreased during the week ending 25 October 2018 by 122 gigalitres (GL) to 11,310 GL and are at 50 per cent of total capacity. This is 22 percentage points or 4,995 GL less than at the same time last year.

- Allocation prices in the southern Murray-Darling Basin increased in the week ending 25 October 2018 to $368 per ML. This is an increase of $7 from the same time last week.
1. Climate

1.1. Rainfall this week

During the week ending 24 October 2018 rainfall was recorded across all states and territories, with the heaviest falls recorded in the north, east, far south and south west of the country. Rainfall totals of between 10 and 50 millimetres were recorded across much of eastern New South Wales, southern Victoria, large areas of northern and eastern Queensland, and the far south-west and north-east of Western Australia. Similar totals were recorded across Tasmania and the north of the Northern Territory.

Higher rainfall totals in excess of 50 millimetres were recorded in isolated parts of eastern Queensland, north-east of New South Wales and northern Tasmania. The highest recorded weekly total was 184 millimetres at Yarras (Mount Seaview), in the Mid North Coast region of New South Wales.

In cropping regions, rainfall totals were highly variable. Falls of between 10 and 100 millimetres were recorded in northern and parts of eastern New South Wales and most cropping regions in Queensland. For remaining cropping regions, little or no rainfall was recorded.
1.2. Temperature anomalies this week

For the week ending 23 October 2018, maximum temperatures were generally above average (2°C to 6°C) across the country. Above average (2°C to 6°C) minimum temperatures recorded across large areas of western New South Wales and Victoria, eastern South Australia, Queensland and southern Northern Territory.

Maximum temperature anomalies for the week ending 23 October 2018

Minimum temperature anomalies for the week ending 23 October 2018

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: http://www.bom.gov.au/jsp/awap/temp/index.jsp.
1.3. An update on winter crop prospects in Australia

National overview

Australian winter crop prospects deteriorated during early spring because of unfavourable seasonal conditions in most cropping regions.

In the September edition of *Australian crop report*, ABARES identified not getting timely rainfall in early spring in many cropping regions and frost events as risks to winter crop prospects.

Unfortunately very much below average September rainfall was experienced in many cropping regions and record low rainfall was recorded in others. Additionally, there were significant frost events in southern New South Wales, Victoria, South Australia and Western Australia. This reduced yield prospects and combined with high fodder prices, provided producers in some regions a strong incentive to cut many crops for hay. In some regions, particularly in New South Wales, many crops were in very poor condition and either grazed or abandoned.

![Rainfall deciles for September 2018](image)

October rainfall to 23 October was above average in most cropping regions in Queensland, northern New South Wales, Western Australia, and mostly average in other cropping regions. This rainfall benefitted crop prospects in southern New South Wales, southern Wimmera in Victoria, southern South Australia and Western Australia. However, it arrived too late in other regions to benefit winter crops. On balance, the benefit of October rainfall is expected to be much smaller than damage that resulted from unfavourable seasonal conditions during September.
ABARES has conducted a preliminary assessment of the expected impact of the unfavourable seasonal conditions during early spring on Australian winter crop production. We expect 2018–19 winter crop production to be around 15 per cent lower than the previous forecast of 33.2 million tonnes published in the September edition of the Australian Crop Report. Wheat, barley and canola production are all expected to be lower than the September forecast by around 13, 17 and 20 per cent respectively. The most significant falls in crop prospects occurred in Victoria and South Australia.

Winter crop area devoted to grains and oilseeds production is estimated to have fallen by around 8 per cent because a higher than planned area was cut for hay.

ABARES is continuing to monitor the progress of 2018–19 winter crops and will publish a more detailed assessment in the December edition of the Australian Crop Report on 4 December 2018.

**New South Wales**

Less than 60 per cent of average rainfall fell in most cropping regions in New South Wales in September. Lower-layer soil moisture in September was very much below average in most cropping regions and the lowest on record in parts of the northwest cropping region. Daytime maximum temperatures were above average. In the southern and western cropping regions, minimum temperatures were below average. The lowest September minimum temperatures on record occurred in regions along the Murray River, which resulted in significant frost events.

Timely rainfall in October fell in most cropping regions in southern New South Wales, where the vast majority of viable crops in New South Wales are located. This rainfall is expected to benefit cereal crops in these regions.

Winter crop production in New South Wales is now expected to be around 10 per cent below the September forecast of 3.9 million tonnes, which would be the state’s lowest winter crop production since 2002–03.
Winter crop area devoted to grains and oilseeds production in New South Wales is estimated to have fallen by around 10 per cent, largely due to significant areas planted to canola and wheat being cut for hay.

**Queensland**

Spring seasonal conditions in Queensland during September were generally unfavourable but are not expected to have damaged winter crop prospects significantly because of the advanced stage of development of crops in Queensland. Rainfall was below average in most Queensland cropping regions and maximum temperatures were above average.

Good rainfall fell in the first few weeks of October, with falls of between 50 to 100mm in some cropping regions. However, the impact of this rainfall on winter crop production is expected to be minimal.

Winter crop production in Queensland is still expected to be around the September forecast of 0.9 million tonnes, which would be Queensland’s lowest winter crop production in over 10 years and similar to production in 2006–07.

**Victoria**

Victorian winter crop prospects deteriorated in September due to lower than average September rainfall and significant frost events. Less than 20 per cent of average rainfall fell in most cropping regions for the month. Minimum temperatures were the lowest on record in most cropping regions, which resulted in significant frost events.

Timely rainfall in early October is expected to benefit winter crop production in the southern Wimmera.

Winter crop production in Victoria is now expected to be around 32 per cent below the September forecast of 5.4 million tonnes, which would be the lowest winter crop production in Victoria since 2015–16.

Winter crop area devoted to grains and oilseeds production in Victoria is estimated to have fallen by around 15 per cent, largely due to significant areas planted to canola and wheat being cut for hay.

**South Australia**

Winter crop prospects deteriorated in South Australia in September because of lower than average September rainfall and significant frost events. September rainfall in most cropping regions was in the 10th percentile. The lowest average minimum temperatures on record for September occurred in many parts of eastern Eyre Peninsula, upper Yorke Peninsula, the mid to upper north, the Murray lands and the upper south east, which resulted in significant frost events.

Timely October rainfall has benefitted southern cropping regions, especially lower Eyre Peninsula, lower Yorke Peninsula and the south east.

Winter crop production in South Australia is now expected to be around 20 per cent below the September forecast of 6.6 million tonnes, which would be the state’s lowest winter crop production since 2008–09.

Winter crop area devoted to grains and oilseeds production in South Australia is estimated to have fallen by around 9 per cent. This is largely due to significant areas planted to cereal crops being cut for hay. The main regions in which this occurred are upper Eyre Peninsula, upper Yorke Peninsula, lower to mid north, southern Mallee and upper south east.

**Western Australia**

Winter crop prospects in Western Australia fell during early spring due to the combined effects of lower than average September rainfall and frost events. September rainfall in Western Australia was the third lowest on record and in many cropping regions was in the 10th percentile. Below average minimum temperatures in September in most cropping regions resulted in significant frosts events.
Timely October rainfall in in most cropping regions benefitted crop prospects, especially in central and southern cropping regions.

Winter crop production in Western Australia is now expected to be around 8 per cent below the September forecast of 16.3 million tonnes. The revised forecast is above the 10 year average to 2017–18.

1.4. National Climate Outlook

The rainfall and temperature outlooks presented here show the likelihood, represented as a percentage, of experiencing wetter or drier (and warmer or cooler) than median climatic conditions for the given outlook periods. These climate outlooks are generated by ACCESS–S (Australian Community Climate Earth-System Simulator–Seasonal). ACCESS–S is the Bureau of Meteorology’s dynamical (physics-based) weather and climate model used for monthly, seasonal and longer-lead climate outlooks. Prior to August 2018, climate outlooks were produced by the Bureau’s earlier model, POAMA.

For further information, go to http://www.bom.gov.au/climate/ahead/about/

The tropical Pacific Ocean has been warming in recent weeks. The Bureau of Meteorology’s model indicates this warming will continue, with El Niño likely to develop before the end of the year. Likewise, in the Indian Ocean, a positive Indian Ocean dipole (IOD) event is likely underway. A positive IOD and El Niño in spring increases the likelihood of a dry and warm end to the southern wet season, and a drier than usual start to the northern wet season. It also raises the risk of heatwaves and bushfire weather in the south but lowers the risk of Tropical Cyclones in the north.

The increased potential for El Niño and a positive IOD is influencing the Bureau of Meteorology’s November–January climate outlook.

A drier than average November is more likely across most of Australia. However, for parts of eastern Australia (east of the Great Dividing Range), inland areas of Western Australia and southern Tasmania there are roughly equal chances of a wetter or drier than average November (Bureau of Meteorology ‘National Climate Outlook’, 25 October 2018).
The rainfall outlook for November 2018 to January 2019 indicates that a drier than average three months is more likely for much of Australia. Meanwhile, most of the northern tropics and eastern New South Wales have roughly equal chances of a wetter or drier three months (Bureau of Meteorology ‘National Climate Outlook’, 25 October 2018).

Much of eastern and southern mainland Australia have been very dry and warm since the start of the year. The Bureau of Meteorology’s rainfall outlook for November 2018 to January 2019 indicates that many areas that are current experiencing drought conditions are unlikely to see above average rainfall in the coming three months.

**Chance of exceeding the median rainfall November 2018 to January 2019**
The temperature outlook for November 2018 to January 2019 indicates that daytime temperatures are more likely to be warmer than average for Australia. Night-time temperatures are also likely to be warmer than average for much of the country, with the exception of south-east Western Australia, southern South Australia and western Victoria, where the chances of warmer or cooler nights are roughly equal (Bureau of Meteorology ‘National Climate Outlook’, 25 October 2018).

**Chance of exceeding the median maximum temperature November 2018 to January 2019**

![Map showing the chance of exceeding the median maximum temperature](Image)

**Chance of exceeding the median minimum temperature November 2018 to January 2019**

![Map showing the chance of exceeding the median minimum temperature](Image)
1.5. Rainfall forecast for the next eight days

During the next eight days, rainfall is expected to be restricted mainly to the east, centre and far north of Australia. The forecast suggests there will be little to no rainfall across the remainder of the country.

Rainfall totals of between 10 and 50 millimetres are forecast for north-eastern New South Wales, much of south-eastern Queensland, western South Australia, the south-east and north-east of Western Australia, western Tasmania and the south-west and far north of the Northern Territory. Heavier falls in excess of 50 millimetres are expected across parts of south-eastern Queensland.

In cropping regions, rainfall of between 10 and 50 millimetres is expected across parts of northern New South Wales, much of Queensland and the west of South Australia. For remaining cropping regions, little or no rainfall is forecast for the next 8 days.

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.
2. Water

2.1. Water markets - current week

Water storage levels in the Murray–Darling Basin (MDB) decreased during the week ending 25 October 2018 by 122 gigalitres (GL) to 11,310 GL and are at 50 per cent of total capacity. This is 22 percentage points or 4,995 GL less than at the same time last year.

Water storages in the Murray-Darling Basin, 2001–2018

![Water storages in the Murray-Darling Basin, 2001–2018](image)

Allocation prices in the southern Murray-Darling Basin increased in the week ending 25 October 2018 to $368 per ML. This is an increase of $7 from the same time last week. This contrasts with an average price of $317 in September across the whole southern MDB, and $122 during the same month last year.

Allocation trade activity, All

![Allocation trade activity, All](image)

Note: The trades shown reflect estimated 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 25 October 2018. Trade activity is shown as colour density.

To access the full interactive weekly water dashboard, which contains the latest and historical water storage, water market and water allocation information, please visit http://www.agriculture.gov.au/abares/publications/weekly_update/weekly-update-251018
3. Commodities

<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>Price 12 months prior</th>
<th>Year on year change</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Selected World Indicator Prices</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Australian Dollar – AUD/USD Exchange Rate</td>
<td>24-Oct</td>
<td>US$/A$</td>
<td>0.71</td>
<td>0.71</td>
<td>0%</td>
<td>0.78</td>
<td>-9%</td>
<td>▼</td>
</tr>
<tr>
<td>Wheat – US no. 2 hard red winter wheat, fob Gulf</td>
<td>23-Oct</td>
<td>US$/t</td>
<td>239</td>
<td>241</td>
<td>&lt;1%</td>
<td>212</td>
<td>13%</td>
<td>▲</td>
</tr>
<tr>
<td>Coarse Grains – US no. 2 yellow corn, fob Gulf</td>
<td>24-Oct</td>
<td>US$/t</td>
<td>161</td>
<td>164</td>
<td>-2%</td>
<td>149</td>
<td>8%</td>
<td>▲</td>
</tr>
<tr>
<td>Canola – Rapeseed, Europe, fob Hamburg</td>
<td>23-Oct</td>
<td>US$/t</td>
<td>431</td>
<td>438</td>
<td>-2%</td>
<td>429</td>
<td>&lt;1%</td>
<td>▲</td>
</tr>
<tr>
<td>Cotton – Cotlook 'A' Index</td>
<td>24-Oct</td>
<td>USc/lb</td>
<td>87.9</td>
<td>87.2</td>
<td>&lt;1%</td>
<td>78.8</td>
<td>12%</td>
<td>▲</td>
</tr>
<tr>
<td>Sugar – Intercontinental Exchange, nearby futures, no.11 contract</td>
<td>24-Oct</td>
<td>USc/lb</td>
<td>13.9</td>
<td>13.3</td>
<td>5%</td>
<td>14.1</td>
<td>-1%</td>
<td>▼</td>
</tr>
<tr>
<td>Wool – Eastern Market Indicator</td>
<td>18-Oct</td>
<td>Ac/kg clean</td>
<td>1,970</td>
<td>2,023</td>
<td>-3%</td>
<td>1,568</td>
<td>26%</td>
<td>▲</td>
</tr>
<tr>
<td>Wool – Western Market Indicator</td>
<td>19-Oct</td>
<td>Ac/kg clean</td>
<td>2,132</td>
<td>2,132</td>
<td>0%</td>
<td>1,614</td>
<td>32%</td>
<td>▲</td>
</tr>
<tr>
<td><strong>Selected domestic crop indicator prices</strong></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Milling Wheat – ASW1, track quote, Port Adelaide, SA</td>
<td>23-Oct</td>
<td>A$/t</td>
<td>399</td>
<td>417</td>
<td>-4%</td>
<td>215</td>
<td>86%</td>
<td>▲</td>
</tr>
<tr>
<td>Feed Wheat – General purpose, Sydney, NSW</td>
<td>24-Oct</td>
<td>A$/t</td>
<td>455</td>
<td>455</td>
<td>0%</td>
<td>258</td>
<td>76%</td>
<td>▲</td>
</tr>
<tr>
<td>Feed Barley – Sydney, NSW</td>
<td>24-Oct</td>
<td>A$/t</td>
<td>435</td>
<td>420</td>
<td>4%</td>
<td>251</td>
<td>73%</td>
<td>▲</td>
</tr>
<tr>
<td>Canola – Portland, Vic.</td>
<td>01-Oct</td>
<td>A$/t</td>
<td>642</td>
<td>598</td>
<td>7%</td>
<td>541</td>
<td>19%</td>
<td>▲</td>
</tr>
<tr>
<td>Grain Sorghum – Sydney, NSW</td>
<td>24-Oct</td>
<td>A$/t</td>
<td>410</td>
<td>410</td>
<td>0%</td>
<td>304</td>
<td>35%</td>
<td>▲</td>
</tr>
<tr>
<td><strong>Selected domestic livestock indicator prices</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Beef – Eastern Young Cattle Indicator</td>
<td>18-Oct</td>
<td>Ac/kg cwt</td>
<td>519</td>
<td>498</td>
<td>4%</td>
<td>553</td>
<td>-6%</td>
<td>▼</td>
</tr>
<tr>
<td>Mutton – Mutton indicator (18–24 kg fat score 2–3), Vic</td>
<td>19-Oct</td>
<td>Ac/kg cwt</td>
<td>446</td>
<td>386</td>
<td>16%</td>
<td>417</td>
<td>7%</td>
<td>▲</td>
</tr>
<tr>
<td>Lamb – Eastern States Trade Lamb Indicator</td>
<td>18-Oct</td>
<td>Ac/kg cwt</td>
<td>737</td>
<td>701</td>
<td>5%</td>
<td>630</td>
<td>17%</td>
<td>▲</td>
</tr>
<tr>
<td>Pig – Eastern Seaboard (60.1–75 kg), average of buyers &amp; sellers</td>
<td>12-Oct</td>
<td>Ac/kg cwt</td>
<td>275</td>
<td>270</td>
<td>2%</td>
<td>277</td>
<td>&lt;1%</td>
<td>▼</td>
</tr>
<tr>
<td>Goat – Eastern States (12.1–16 kg)</td>
<td>22-Oct</td>
<td>Ac/kg cwt</td>
<td>538</td>
<td>538</td>
<td>0%</td>
<td>462</td>
<td>16%</td>
<td>▲</td>
</tr>
<tr>
<td>Live cattle – Light steers ex Darwin to Indonesia</td>
<td>20-Oct</td>
<td>Ac/kg lwt</td>
<td>300</td>
<td>300</td>
<td>0%</td>
<td>330</td>
<td>-9%</td>
<td>▼</td>
</tr>
<tr>
<td>Live sheep – Live wether (Muchea WA saleyard) to Middle East</td>
<td>22-Oct</td>
<td>$/head</td>
<td>108</td>
<td>92</td>
<td>17%</td>
<td>124</td>
<td>-13%</td>
<td>▼</td>
</tr>
</tbody>
</table>
## Global Dairy Trade (GDT) weighted average 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>Dairy – Whole milk powder</td>
<td>16-Oct</td>
<td>US$/t</td>
<td>2,729</td>
<td>2,753</td>
<td>&lt;1% ↓</td>
<td>3,014</td>
<td>-9% ↓</td>
</tr>
<tr>
<td>Dairy – Skim milk powder</td>
<td>16-Oct</td>
<td>US$/t</td>
<td>1,977</td>
<td>1,982</td>
<td>&lt;1% ↓</td>
<td>1,797</td>
<td>10% ↑</td>
</tr>
<tr>
<td>Dairy – Cheddar cheese</td>
<td>16-Oct</td>
<td>US$/t</td>
<td>3,404</td>
<td>3,468</td>
<td>-2% ↓</td>
<td>4,107</td>
<td>-17% ↓</td>
</tr>
<tr>
<td>Dairy – Anhydrous milk fat</td>
<td>16-Oct</td>
<td>US$/t</td>
<td>5,106</td>
<td>5,069</td>
<td>&lt;1% ↑</td>
<td>6,841</td>
<td>-25% ↓</td>
</tr>
</tbody>
</table>

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

- **World wheat indicator price**
  - US No. 2, hard red winter wheat, fob Gulf
  - Week ended 23 October 2018

- **World coarse grains indicator price**
  - US corn No. 2, fob Gulf
  - Week ended 24 October 2018

- **World canola indicator price**
  - Europe fob Hamburg
  - Week ended 23 October 2018

- **World cotton indicator price**
  - Cotlook 'A' index
  - Week ended 24 October 2018
3.2. Global Dairy Trade (GDT) weighted average prices

- Whole milk powder price
  16 October 2018
- Skim milk powder price
  16 October 2018
- Cheddar cheese price
  16 October 2018
- Anhydrous milk fat price
  16 October 2018
3.3. Selected domestic crop indicator prices

Grain sorghum indicator price
Sydney, NSW
Week ended 24 October 2018

Feed barley indicator price
Sydney, NSW
Week ended 24 October 2018

Feed wheat indicator price
General Purpose, Sydney, NSW
Week ended 24 October 2018

Milling wheat indicator price
ASW1, track quote, Port Adelaide, SA
Week ended 23 October 2018
3.4. Selected domestic livestock indicator prices

Eastern Young Cattle Indicator
Week ended 18 October 2018

Eastern States Trade Lamb Indicator
Week ended 18 October 2018

Mutton indicator price in Victoria
(18–24 kg fat score 2–3)
Week ended 19 October 2018

Pig indicator price Eastern Seaboard
(60.1–75 kg)
Week ended 12 October 2018
3.5. Selected fruit and vegetable prices – week ended 25 October 2018

Weekly wholesale prices for blueberry, pineapple (smoothleaf), watermelon (seedless) & banana (cavendish)

Weekly wholesale prices for kiwifruit (hayward), strawberry, apple (royal gala) & avocado (hass)

Weekly wholesale prices for onion (brown), cauliflower, potato (white, brushed) & tomato (field gourmet)

Weekly wholesale prices for broccoli, lettuce (iceberg), pumpkin (grey bulk) & bean (round stringless)
4. 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