Summary of key issues

- During the week ending 18 September 2019 little to no rainfall was recorded across most of Australia, with falls restricted to the far south-east.

- Across cropping regions rainfall totals of between 10 to 25 millimetres were recorded in part of eastern New South Wales. Lighter falls of between 1 and 10 millimetres were recorded across cropping regions in central and southern New South Wales, Victoria, isolated parts of Western Australia and eastern South Australia.

- Cropping regions in Western Australia have experienced unfavourable climatic conditions during early spring. Low rainfall totals, and frost and heat events during the critical flowering and grain filling stage of growth are likely to lower crop production prospects across the state.

- Over the next eight days, frontal activity is expected to result in limited rainfall, restricted to small areas in the south and far east of Australia, and an isolated area of central Australia.

- Across Australia’s winter cropping regions, the 8-day rainfall forecast indicates that falls of between 10 and 25 millimetres are expected across western South Australia. Lighter falls of between 1 and 10 millimetres are expected across remaining cropping regions.

- Water storage levels in the Murray-Darling Basin (MDB) increased between 10 September and 17 September 2019 by 30 gigalitres (GL). Current volume of water held in storage is 10,413 GL which represents 41 per cent of total capacity. This is 28 percentage points or 3,976 GL less than at the same time last year.

- Allocation prices in the Victorian Murray below the Barmah Choke remained steady at $792 per ML from 2 September 2019 to 9 September 2019. Trade restrictions are currently binding in several catchments, leading to differences in water prices across the Murray Darling Basin.
1. Climate

1.1. Rainfall this week

During the week ending 18 September 2019 little to no rainfall was recorded across most of Australia, with falls restricted to the far south-east.

Across cropping regions, rainfall totals of between 10 to 25 millimetres were recorded in part of eastern New South Wales. Lighter falls of between 1 and 10 millimetres were recorded across cropping regions in central and southern New South Wales, Victoria, isolated parts of Western Australia and eastern South Australia. Little to no rainfall was recorded across cropping regions in Queensland, and remaining cropping regions in New South Wales, Western Australia and South Australia.

Cropping regions in Western Australia have experienced unfavourable conditions during the start of spring, with warm and dry conditions persisting in northern cropping regions and frost events occurring in southern cropping regions. While sufficient rainfall was recorded across most cropping regions during August, low rainfall totals and the frost and heat events during the critical flowering and grain filling stage of growth are likely to lower crop production prospects across the state.

Rainfall for the week ending 18 September 2019

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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

For the week ending 17 September 2019, maximum temperatures were 2°C to 6°C above average across southern Australia, with temperatures up to 10°C above average across large parts of Western Australia. Similarly, minimum temperatures were 2°C to 8°C above average across south-western Australia. In contrast, minimum temperatures were 2°C to 6°C below average across large parts of northern and eastern Australia. Average (-2°C to 2°C) minimum and maximum temperatures were recorded across the remainder of the country.

**Maximum temperature anomalies for the week ending 17 September 2019**

[Map showing temperature anomalies for maximum temperatures]

**Minimum temperature anomalies for the week ending 17 September 2019**

[Map showing temperature anomalies for minimum temperatures]

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](http://www.bom.gov.au/jsp/awap/temp/index.jsp).
1.3. Rainfall forecast for the next eight days

Over the next eight days, frontal and trough activity is expected to result in some rainfall over parts of southern, eastern and central Australia. However, a high-pressure system across the south-west of Australia is forecast to move over the Great Australian Bight during the next eight days, and is likely to restrict the movement of rain-bearing systems and result in limited rainfall forecast for much of mainland Australia.

Rainfall of between 10 and 25 millimetres is forecast for small parts of far eastern New South Wales, southern and eastern Victoria, southern South Australia and the south-east of the Northern Territory. Higher rainfall totals up to 100 millimetres are forecast for western Tasmania. Rainfall of between 1 and 10 millimetres is forecast for south-eastern Queensland, the south-west of Western Australia, parts of western and southern South Australia and remaining areas of eastern New South Wales, Victoria and south of the Northern Territory.

In cropping regions, rainfall of between 10 and 25 millimetres is expected across western South Australia. Lighter falls of between 1 and 10 millimetres are forecast across cropping regions in eastern and northern New South Wales, southern Queensland, Victoria, eastern South Australia and Western Australia. Little to no rainfall is expected across remaining cropping regions in southern New South Wales and northern Queensland.

Total forecast rainfall (mm) for the period 19 September to 26 September 2019

Note: This rainfall forecast is produced from computer models. As the model outputs are not altered by 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 in the Murray–Darling Basin (MDB) increased by 30 gigalitres (GL) or 0.1% of storage capacity between 10 September and 17 September 2019. The current volume of water held in storage is 10,413 GL, which represents 41% of total capacity. This is 28% or 3,976 GL less than at the same time last year.


Allocation prices in the Victorian Murray below the Barmah Choke remained steady at $792 per ML from 2 September 2019 to 9 September 2019. Trade restrictions are currently binding in several catchments, leading to differences in water prices across the Murray Darling Basin.

Surface water trade activity, Southern Murray–Darling Basin

The trades shown reflect estimated market activity and do not encompass all register trades. The price line reflects value weighted average prices for the entire southern Murray-Darling Basin up until 1 July 2019. The price line after 1 July 2019 reflects recorded transaction prices in the Victorian Murray (Below the Choke). Data shown is current at 19 September 2019, and encompasses water market activity until 9 September 2019. Data is sourced from the BOM water dashboard, or Ruralco Water for price data after 1 July 2019.

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-190919
### 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>18-Sep</td>
<td>US$/A$</td>
<td>0.69</td>
<td>0.68</td>
<td>1% ↑</td>
<td>0.72</td>
<td>-4% ↓</td>
</tr>
<tr>
<td>Wheat – US no. 2 hard red winter wheat, fob Gulf</td>
<td>17-Sep</td>
<td>US$/t</td>
<td>203</td>
<td>199</td>
<td>2% ↑</td>
<td>238</td>
<td>-15% ↓</td>
</tr>
<tr>
<td>Coarse Grains – US no. 2 yellow corn, fob Gulf</td>
<td>18-Sep</td>
<td>US$/t</td>
<td>159</td>
<td>153</td>
<td>4% ↑</td>
<td>150</td>
<td>6% ↑</td>
</tr>
<tr>
<td>Canola – Rapeseed, Europe, fob Hamburg</td>
<td>17-Sep</td>
<td>US$/t</td>
<td>429</td>
<td>425</td>
<td>&lt;1% ↑</td>
<td>429</td>
<td>0%</td>
</tr>
<tr>
<td>Cotton – Cotlook ‘A’ Index</td>
<td>18-Sep</td>
<td>USc/lb</td>
<td>72.8</td>
<td>70.4</td>
<td>3% ↑</td>
<td>90.7</td>
<td>-20% ↓</td>
</tr>
<tr>
<td>Sugar – Intercontinental Exchange, nearby futures, no.11 contract</td>
<td>18-Sep</td>
<td>USc/lb</td>
<td>10.6</td>
<td>11.0</td>
<td>-4% ↓</td>
<td>11.0</td>
<td>-4% ↓</td>
</tr>
<tr>
<td>Wool – Eastern Market Indicator</td>
<td>12-Sep</td>
<td>Ac/kg clean</td>
<td>1,535</td>
<td>1,365</td>
<td>12% ↑</td>
<td>2,094</td>
<td>-27% ↓</td>
</tr>
<tr>
<td>Wool – Western Market Indicator</td>
<td>13-Sep</td>
<td>Ac/kg clean</td>
<td>1,625</td>
<td>1,383</td>
<td>17% ↑</td>
<td>2,256</td>
<td>-28% ↓</td>
</tr>
</tbody>
</table>

#### Selected domestic crop indicator prices

| Milling Wheat – ASW1, track quote, Port Adelaide, SA                      | 10-Sep     | A$/t              | 300           | na               | na            | 367                   | -18% ↓              |
| Feed Wheat – General purpose, Sydney, NSW                                 | 18-Sep     | A$/t              | 375           | 365              | 3% ↑          | 430                   | -13% ↓              |
| Feed Barley – Sydney, NSW                                                | 18-Sep     | A$/t              | 360           | 360              | 0% ●           | 410                   | -12% ↓              |
| Grain Sorghum – Sydney, NSW                                               | 18-Sep     | A$/t              | 345           | 325              | 6% ↑          | 410                   | -16% ↓              |

#### Selected domestic livestock indicator prices

<p>| Beef – Eastern Young Cattle Indicator                                     | 12-Sep     | Ac/kg cwt         | 477           | 500              | -5% ↓         | 496                   | -4% ↓               |
| Mutton – Mutton indicator (18–24 kg fat score 2–3), Vic                   | 13-Sep     | Ac/kg cwt         | 558           | 579              | -4% ↓         | 481                   | 16% ↑               |
| Lamb – Eastern States Trade Lamb Indicator                                | 12-Sep     | Ac/kg cwt         | 811           | 803              | &lt;1% ↑         | 792                   | 2% ↑                |
| Pig – Eastern Seaboard (60.1–75 kg), average of buyers &amp; sellers          | 06-Sep     | Ac/kg cwt         | 389           | 386              | &lt;1% ↑         | 249                   | 56% ↑               |
| Goat – Eastern States (12.1–16 kg)                                       | 16-Sep     | Ac/kg cwt         | 880           | 902              | &lt;2% ↑         | 540                   | 63% ↑               |
| Live cattle – Light steers ex Darwin to Indonesia                         | 14-Sep     | $/head            | 315           | 315              | 0% ●           | 300                   | 5% ↑                |
| Live sheep – Live wether (Muchea WA saleyard) to Middle East             | 13-May     | $/head            | 135           | 110              | 23% ↑         | 95                    | 42% ↑               |</p>
<table>
<thead>
<tr>
<th>Indicator</th>
<th>Week ended</th>
<th>Unit</th>
<th>Latest price</th>
<th>Price week prior</th>
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</thead>
<tbody>
<tr>
<td>Global Dairy Trade (GDT) weighted average prices a</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dairy – Whole milk powder</td>
<td>17-Sep</td>
<td>US$/t</td>
<td>3,133</td>
<td>3,076</td>
<td>2%</td>
<td>2,768</td>
<td>13%</td>
</tr>
<tr>
<td>Dairy – Skim milk powder</td>
<td>17-Sep</td>
<td>US$/t</td>
<td>2,599</td>
<td>2,500</td>
<td>4%</td>
<td>1,980</td>
<td>31%</td>
</tr>
<tr>
<td>Dairy – Cheddar cheese</td>
<td>17-Sep</td>
<td>US$/t</td>
<td>3,846</td>
<td>3,827</td>
<td>&lt;1%</td>
<td>3,503</td>
<td>10%</td>
</tr>
<tr>
<td>Dairy – Anhydrous milk fat</td>
<td>17-Sep</td>
<td>US$/t</td>
<td>5,030</td>
<td>4,988</td>
<td>&lt;1%</td>
<td>5,294</td>
<td>-5%</td>
</tr>
</tbody>
</table>

a 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](chart1)

*US No. 2, hard red winter wheat, fob Gulf*  
*Week ended 17 September 2019*

![World canola indicator price](chart2)

*Europe fob Hamburg*  
*Week ended 17 September 2019*

![World coarse grains indicator price](chart3)

*US corn No. 2, fob Gulf*  
*Week ended 18 September 2019*

![World cotton indicator price](chart4)

*Cotlook ‘A’ index*  
*Week ended 18 September 2019*
3.2. Global Dairy Trade (GDT) weighted average prices

- Whole milk powder price, 17 September 2019
- Skim milk powder price, 17 September 2019
- Cheddar cheese price, 17 September 2019
- Anhydrous milk fat price, 17 September 2019
3.3. Selected domestic crop indicator prices

Grain sorghum indicator price
Sydney, NSW
Week ended 18 September 2019

Feed wheat indicator price
General Purpose, Sydney, NSW
Week ended 18 September 2019

Feed barley indicator price
Sydney, NSW
Week ended 18 September 2019

Milling wheat indicator price
ASW1, track quote, Port Adelaide, SA
Week ended 10 September 2019
3.4. Selected domestic livestock indicator prices

Eastern Young Cattle Indicator
Week ended 12 September 2019

Eastern States Trade Lamb Indicator
Week ended 12 September 2019

Mutton indicator price in Victoria
(18–24 kg fat score 2–3)
Week ended 13 September 2019

Pig indicator price Eastern Seaboard
(60.1–75 kg)
Week ended 6 September 2019
3.5. Selected fruit and vegetable prices – week ended 19 September 2019

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

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

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

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

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

Dairy

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