Australian Government
Department of Agriculture, Fisheries and Forestry
ABARES

Weekly Australian Climate, Water and Agricultural Update

No. 22/2025 5 June 2025

Summary of key issues

- In the week ending 4 June 2025 cold fronts and low-pressure systems brought rainfall to parts of western and eastern Australia.
    - Cropping regions in Western Australia, Queensland and northern New South Wales received 5-100 millimetres of rainfall, while little or no rainfall was recorded in southern New South Wales, South Australia and Victoria.
- Over the coming eight days, rainfall is expected across much of southern Australia.
    - 10-50 millimetres of rainfall is expected in southern cropping areas including southern New South Wales, Victoria, and South Australia. If realised, this should provide sufficient moisture to support the germination of dry sown winter crops in the southeast. In Western Australia, 5-25 millimetres is forecast.
- Most of northern and eastern Australia received average to above average rainfall over May 2025, while much of southern Australia recorded extremely low to below average rainfall.
    - The lack of rainfall during May, would have meant that most early planted winter crops across South Australia, Victoria and parts Western Australia would have been sown dry and still awaiting sufficient rainfall to support germination and establishment.
    - These very dry conditions coupled with little to no stored soil moisture is also likely to have discouraged some growers from committing to their full planting intentions, and lead to a change in the production mix away from canola to less input intensive crops like, wheat, barley and pulses.
- Pasture growth for the three months to May 2025 has been mixed across Australia.
    - Below average pasture growth across large areas of Victoria, South Australia, Western Australia, south-eastern Queensland, and north-eastern and southern New South Wales will likely see graziers in these regions actively destocking or becoming increasingly reliant on supplemental feed to maintain current stocking rates and production.
- Water storage levels in the Murray-Darling Basin (MDB) increased by 135 gigalitres (GL) between 29 May 2025 and 5 June 2025. The current volume of water held in storages is 12,517 GL, equivalent to 56% of total storage capacity. This is 26% or 4,422 GL less than at the same time last year. Water storage data is sourced from the Bureau of Meteorology.
- Allocation prices in the Victorian Murray below the Barmah Choke decreased from $291 on 29 May 2025 to $290 on 5 June 2025. Trade from the Goulburn to the Murray is closed. Trade downstream through the Barmah Choke is closed. Trade from the Murrumbidgee to the Murray is open.

1. Climate

1.1. Rainfall this week

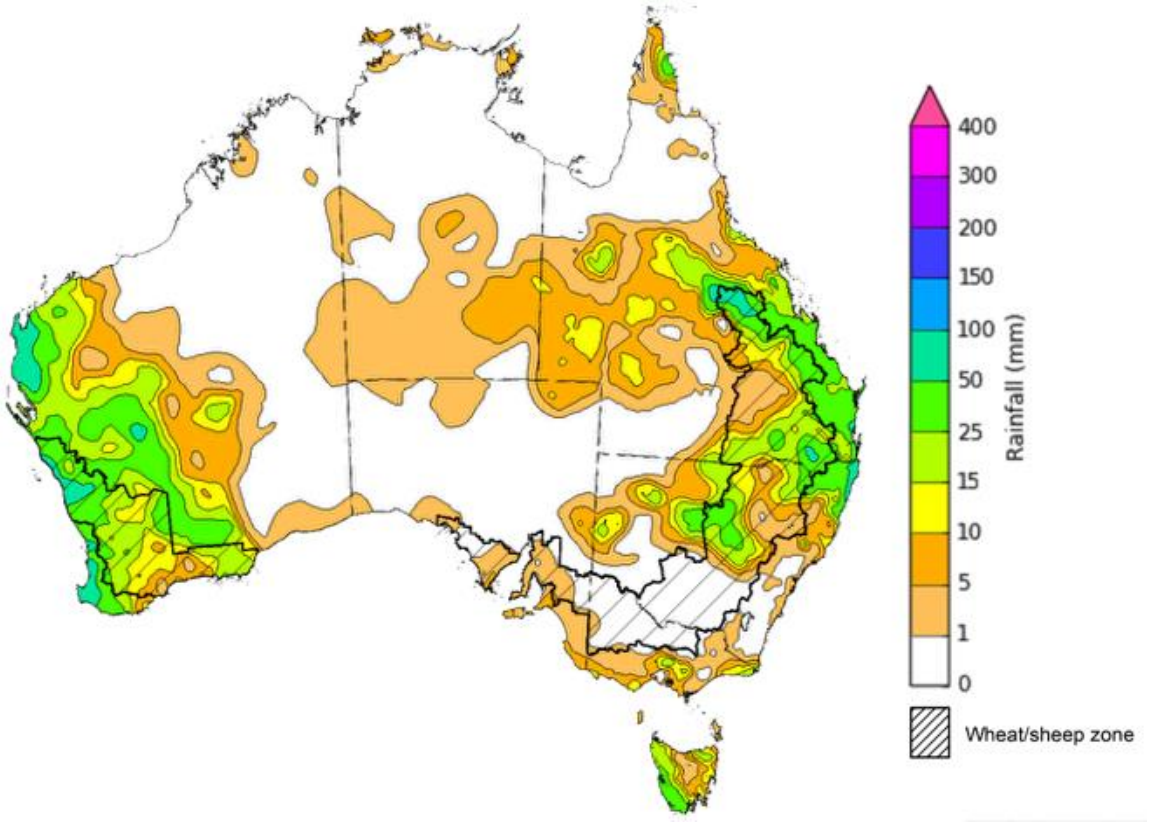
In the week ending 4 June 2025, **cold fronts and low pressure systems** brought rainfall to parts of western and eastern Australia. High-pressure systems southeastern Australia largely dry.

- Between 5-100 millimetres of rainfall was recorded across parts of Western Australia and eastern Queensland.
- In northern New South Wales and Tasmania, falls of between 5-50 millimetres were observed.
- Southern, central and northern regions of the country received little to no rainfall over the period.

Rainfall was recorded across cropping regions in the west and northeast, while south-eastern areas remained dry in the week ending 4 June 2025.

- Rainfall totals of between 5-100 millimetres occurred over much of Queensland and Western Australia, while much of northern New South Wales saw 5-50 millimetres.
- In remaining southern cropping regions, including southern New South Wales, Victoria and South Australia, little to no rainfall was recorded.
- Low rainfall in the recent week will continue to delay the germination of dry sown winter crops in areas of south-eastern Australia where upper layer soil moisture is low.

Rainfall for the week ending 4 June 2025



 Issued: 4/6/2025

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. Rainfall forecast for the next eight days

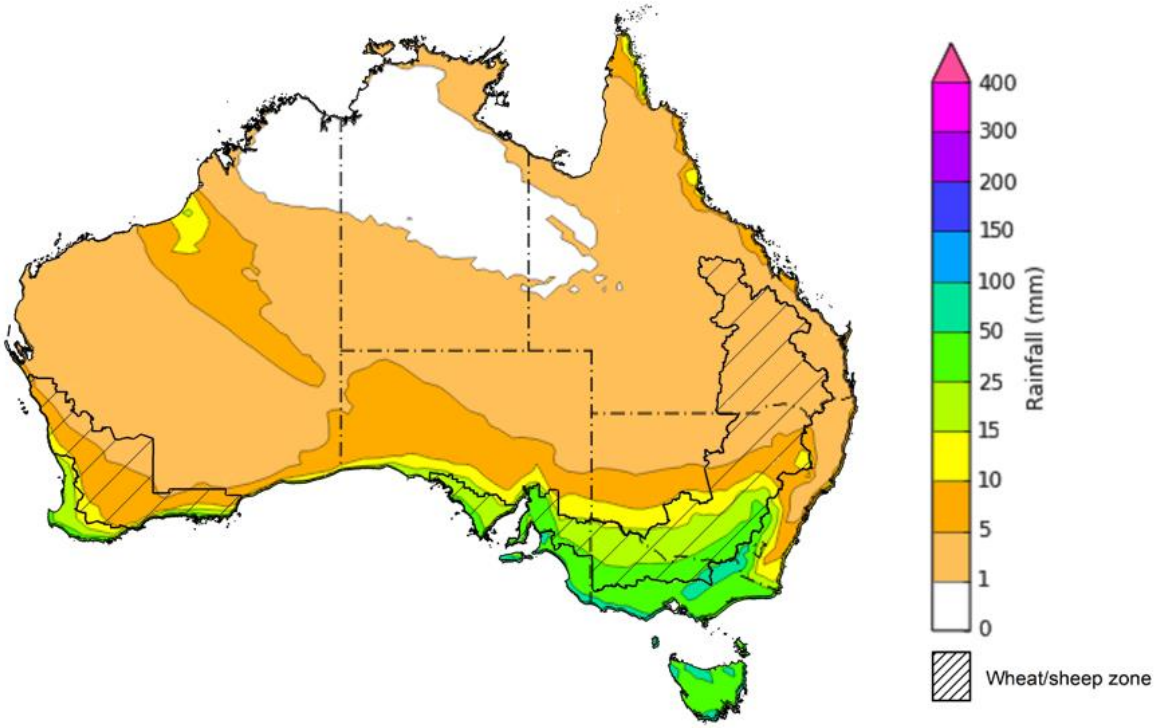
Over the 8 days to 12 June 2025, **low-pressure systems and cold fronts** are expected to bring rainfall to parts of southern Australia.

- Large areas of Victora and southern New South Wales are expected to see 15-50 millimetres of rainfall, with some regions too see falls of up to 100 millimetres, while Tasmania is forecast to see 25-100 millimetres.
    - Meanwhile, southern regions of Western Australia and South Australia are forecast to see 10-50 millimetres.
- High-pressure systems are expected to keep the northern two-thirds of Australia relatively dry.

Timely rainfall is expected across most southern cropping regions over the coming week.

- In South Australia, Victoria and southern New South Wales, between 10-50 millimetres of rainfall is expected over the period. If realised, this should provide sufficient moisture to support the germination of dry sown winter crops.
- Meanwhile, lower rainfall totals are expected across northern New South Wales and Western Australia, with a rainfall forecast of up to 25 millimetres.
- Little to no rainfall is expected across cropping zones in Queensland.

Total forecast rainfall for the period 5 June to 12 June 2025



 Issued 5/6/2025
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.

1.3. Monthly rainfall

Rainfall during May 2025 was highly variable:

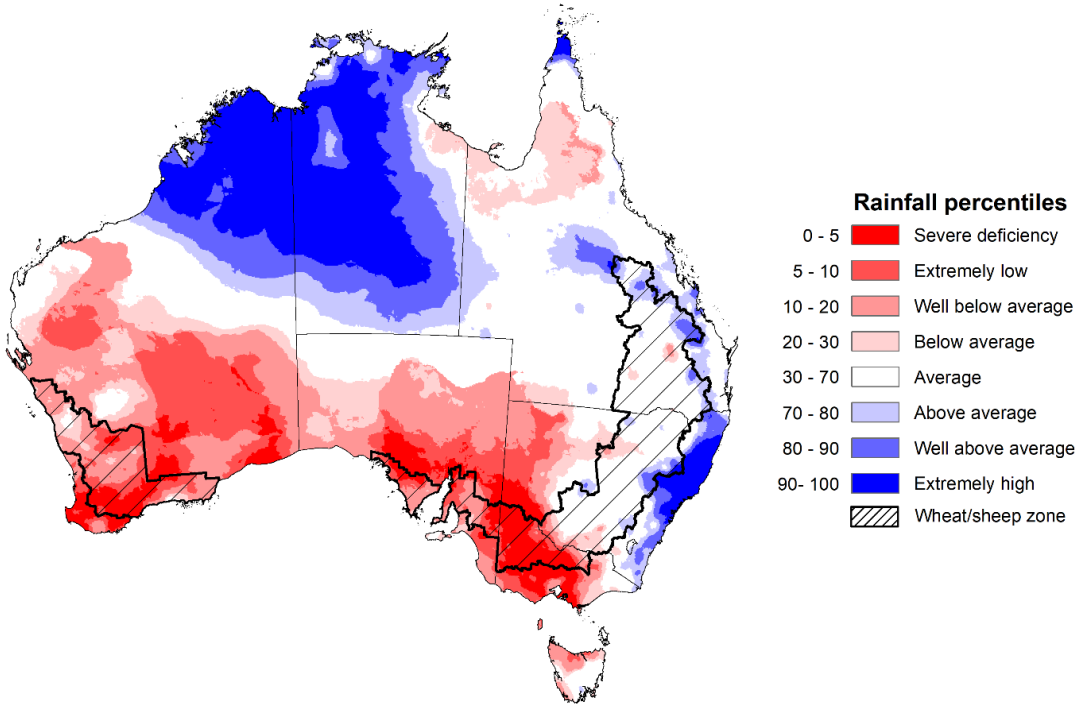
- Rainfall was **extremely low** to **below average** across large areas of western New South Wales, Victoria, South Australia, and northern Tasmania, as well as much of southern and central Western Australia
- **Above average** to **extremely high** rainfall was recorded across much of the Northern Territory and northern Western Australia, as well as eastern coastal regions of New South Wales and isolated areas of Queensland.
- The remainder of Australia saw generally average May rainfall.

In cropping regions, May rainfall was variable, with generally extremely low to below average rainfall in the south and west and generally average rainfall in the east:

- Most cropping regions in South Australia, Victoria, Western Australia observed extremely low to below average rainfall.
- In Queensland and New South Wales, generally average rainfall was experienced over the period with isolated areas seeing below average and above average rainfall.

The generally average rainfall conditions recorded across Queensland and New South Wales would have allowed most producers to finalise the harvesting of summer crops without too many delays. However, the lack of rainfall during May, would have meant that most early planted winter crops across South Australia, Victoria and parts Western Australia would have been sown dry and still awaiting sufficient rainfall to support germination and establishment. These very dry conditions coupled with little to no stored soil moisture is also likely to have discouraged some growers from committing to their full planting intentions, and lead to a change in the production mix away from canola to less input intensive crops like, wheat, barley and pulses.

Rainfall percentiles for May 2025



Note: Rainfall for May 2025 is compared with rainfall recorded for that period during the historical record (1900 to present). For further information, go to http://www.bom.gov.au/climate/austmaps/about-rain-maps.shtml

Source: Bureau of Meteorology

Monthly Soil Moisture

In May 2025, modelled **upper layer soil moisture** was generally average to above average across northern and eastern Australia, and very much below average in the south and west.

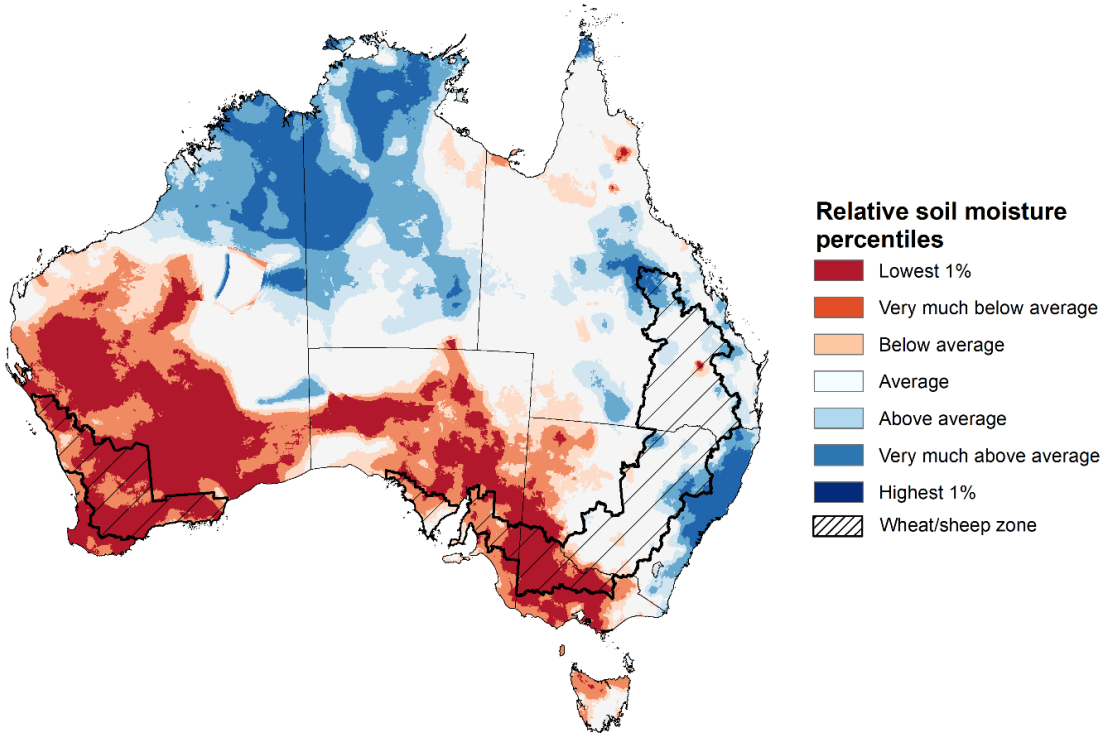
- Large areas of South Australia, Victoria, southern Western Australia, western New South Wales and Tasmania saw **very much below average to below average upper layer soil moisture.**
- In contrast, much of Queensland, the remainder of New South Wales, the Northern Territory and northern Western Australia saw **average to very much above upper layer soil moisture.**

At this time of year, upper layer soil moisture is important for the germination and establishment of early sown winter crops across Australian cropping regions. Across most eastern cropping regions modelled upper layer soil moisture in May was generally **average**. In contrast, most cropping regions in the south saw **extremely low to below average** upper layer soil moisture.

- Across most South Australian, Victorian and Western Australian cropping regions upper layer soil moisture was **extremely low to below average**.
- In Queensland and New South Wales, upper layer soil moisture was **average to very much above average**.

Below average upper layer soil moisture across much of Western Australia, Victoria and South Australia has likely impeded the germination and establishment of dry sown winter crops in these regions.

Modelled upper layer soil moisture for May 2025



Note: This map shows the levels of modelled upper layer soil moisture (0 to 10 centimetres) during May 2025. This map shows how modelled soil conditions during May 2025 compare with February conditions modelled over the reference period (1911 to 2016). Dark blue areas on the maps were much wetter in May 2025 than during the reference period. The bulk of plant roots occur in the top 20 centimetres of the soil profile. Soil moisture in the upper layer of the soil profile is therefore useful indicator of the availability of water, particularly for germinating seed.
Source: Bureau of Meteorology (https://awo.bom.gov.au/about/overview)

Similar to upper layer soil moisture, modelled **lower layer soil moisture** in May 2025 was average to very much above average across much of northern and eastern Australia, while extremely low to below average in southern and western areas.

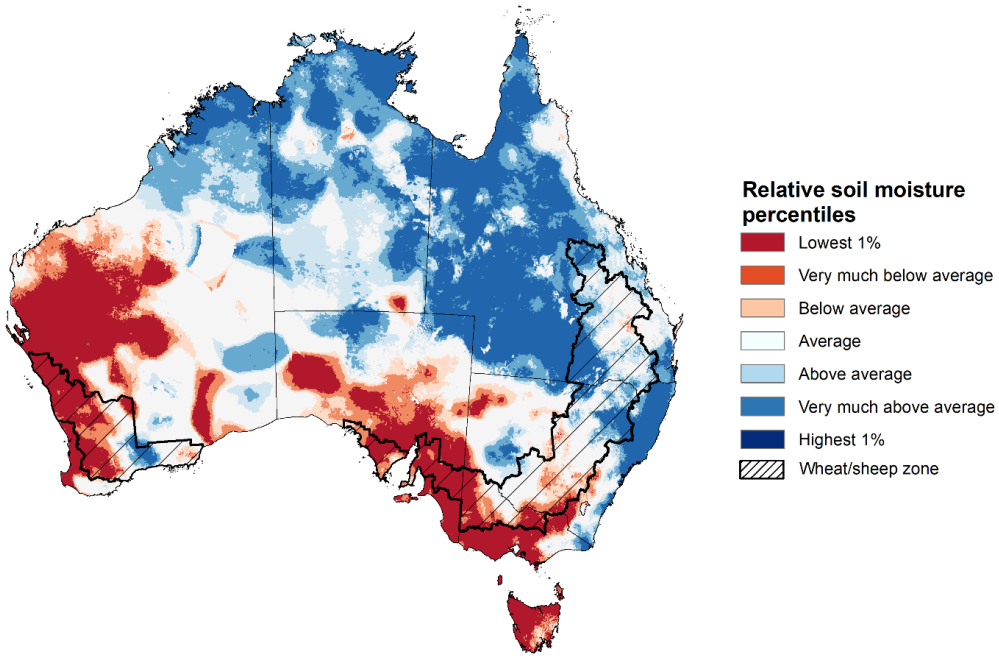
- Large areas of the Northern Territory, northern Western Australia, Queensland, and eastern New South Wales were modelled as having **very much above average soil moisture.**
- By contrast, much of south-eastern Australia, including parts of southern New South Wales, Victoria, South Australia and Tasmania, as well as western regions of Western Australia were modelled as having **extremely low to below average soil moisture** over the period**.**

Lower layer soil moisture is a larger, deeper store that is slower to respond to seasonal conditions and tends to reflect the accumulated effects of events that have occurred over longer periods. Crop development and pasture growth in areas of above average lower layer soil moisture are typically less reliant on in-season rainfall than in areas with below average lower layer soil moisture.

Across cropping regions, much of Queensland, New South Wales and eastern Western Australia saw above **average to very much above average** modelled lower layer soil moisture**.** In contrast, South Australia, the west of Western Australia, Victoria, and parts of southern New South Wales saw **extremely low to below average** soil moisture for this time of year**.**

Deficient levels of lower layer soil moisture across cropping region in south-east Australia and the west of Western Australia present an ongoing downside production risk to the 2025-26 winter crop. These growing regions will require sufficient and timely rainfall throughout the remainder of the growing season to support the growth and development of crops.

Modelled lower layer soil moisture for May 2025



Note: This map shows the levels of modelled lower layer soil moisture (10 to 100 centimetres) during May 2025. This map shows how modelled soil conditions during May 2025 compare with May conditions modelled over the reference period (1911 to 2016). Dark blue areas on the maps were much wetter in May 2025 than during the reference period. The dark red areas were much drier than during the reference period. The bulk of plant roots occur in the top 20 centimetres of the soil profile. The lower layer soil moisture is a larger, deeper store that is slower to respond to rainfall and tends to reflect accumulated rainfall events over longer time periods.
Source: Bureau of Meteorology (https://awo.bom.gov.au/about/overview)

1.4 Pasture Growth

Pasture growth for the three months to May 2025 has been mixed across much of country, with northern and parts of eastern Australia experiencing improved pasture growth.

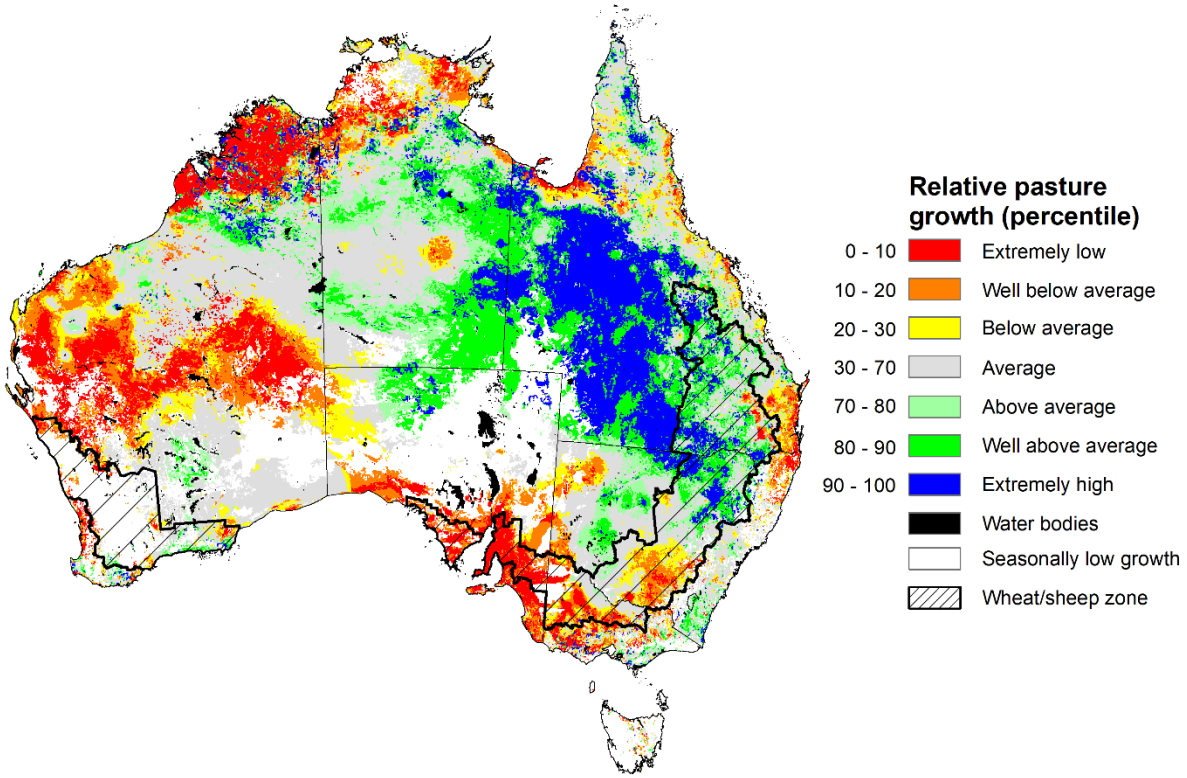
Average to **extremely high** pasture growth was modelled across large areas of northern and eastern Australia, including Queensland, northern New South Wales, much of the Northern Territory, and northern regions of South Australia.

- This pasture growth is expected to allow farmers to maintain stock numbers, provide opportunities to build standing dry matter availability and decrease the reliance on fodder to maintain livestock condition over the winter period.

  By contrast, large areas of Victoria, South Australia, Western Australia, south-eastern Queensland, and north-eastern and southern New South Wales saw relatively low pasture growth for this time of year.

- This below average pasture growth will likely see graziers in affected regions actively destocking or becoming increasingly reliant on supplemental feed to maintain current stocking rates and production.

Relative pasture growth for 3-months ending May 2025 (1 March to 31 May 2025)



Notes: AussieGRASS pasture growth estimates are relative to the long-term record and shown in percentiles. Percentiles rank data on a scale of zero to 100. This analysis ranks pasture growth for the selected period against average pasture growth for the long-term record (1957 to 2016). Pasture growth is modelled at 5km2 grid cells.
Source: Department of Environment, Science and Innovation

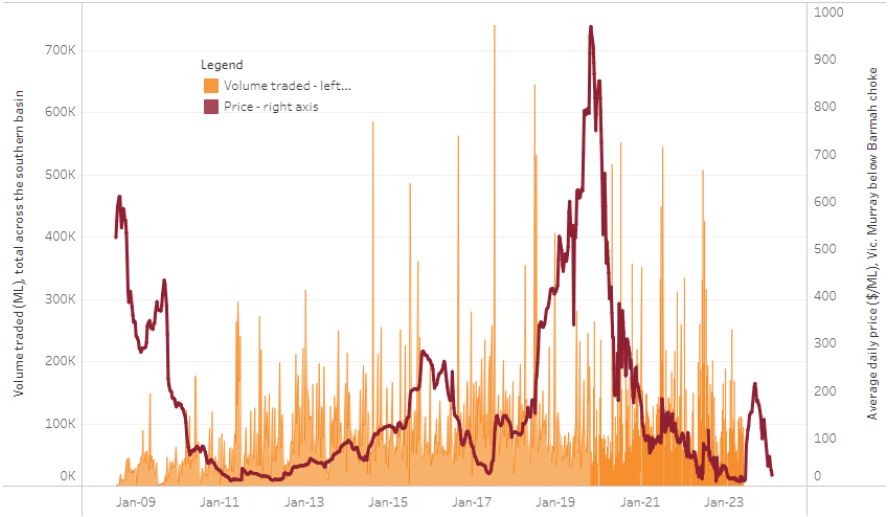
2.1. Water markets – current week

Water storage levels in the Murray-Darling Basin (MDB) increased by 135 gigalitres (GL) between 29 May 2025 and 5 June 2025. The current volume of water held in storages is 12,517 GL, equivalent to 56% of total storage capacity. This is 26% or 4,422 GL less than at the same time last year. Water storage data is sourced from the Bureau of Meteorology.

Water storages in the Murray-Darling Basin, 2013–2025

Allocation prices in the Victorian Murray below the Barmah Choke decreased from $291 on 29 May 2025 to $290 on 5 June 2025. Trade from the Goulburn to the Murray is closed. Trade downstream through the Barmah Choke is closed. Trade from the Murrumbidgee to the Murray is open.

Surface water trade activity, Southern Murray–Darling Basin



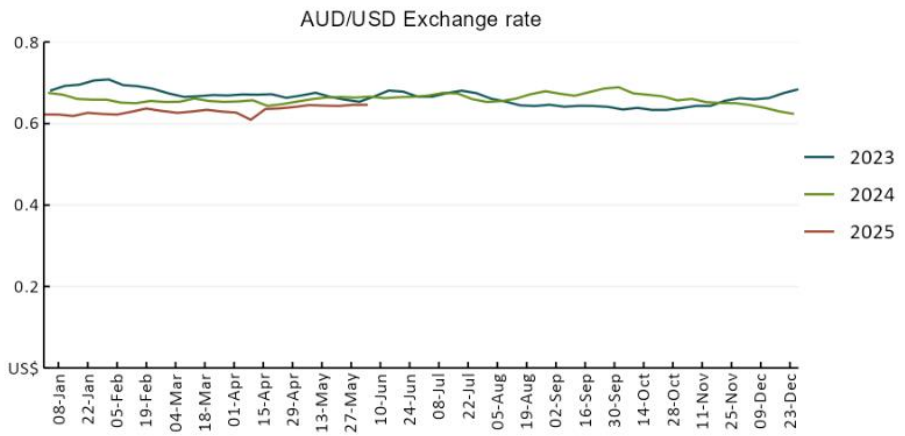
The trades shown reflect estimated market activity and do not encompass all register trades. The price is shown for the VIC Murray below the Barmah choke. Historical prices (before 1 July 2019) are ABARES estimates after removing outliers from BOM water register data. Prices after 1 July 2019 and prior to the 30 October 2019 reflect recorded transaction prices as sourced from Ruralco. Prices after the 30 October 2019 are sourced from Waterflow. Data for volume traded is sourced from the BOM water register. Only the price data shown is current on 17 October 2024.

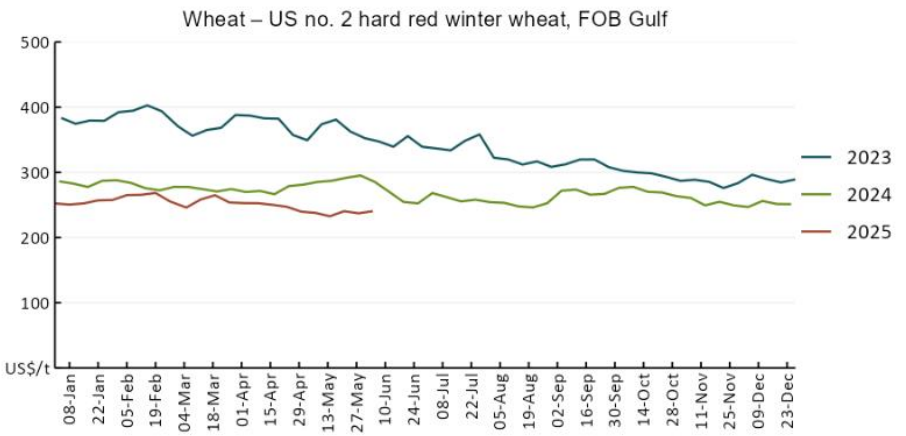
To access the full, interactive, weekly water dashboard, which contains the latest and historical water storage, water market and water allocation information, please visit https://www.agriculture.gov.au/abares/products/weekly_update/weekly-update-060525

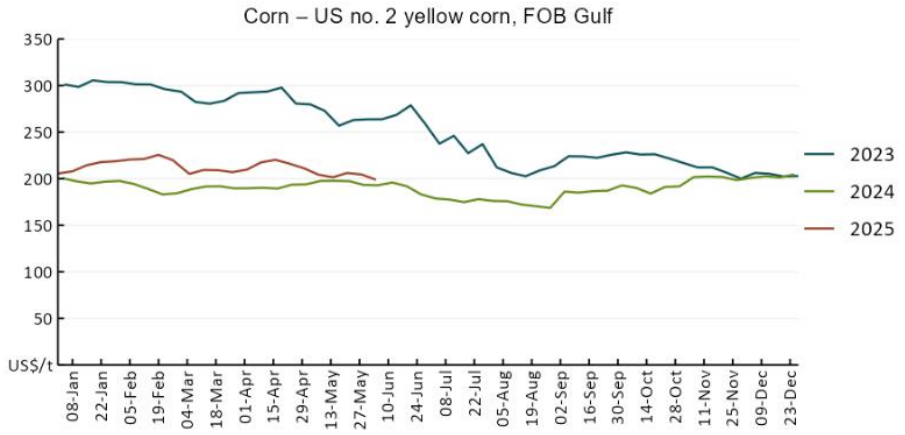
3. Commodities

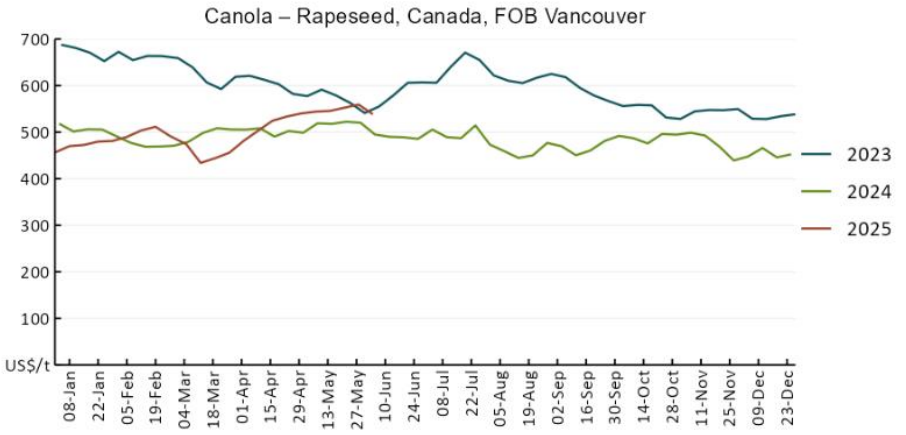
Indicator	Week average	Unit	Latest Price	Previous Week	Weekly change	Price 12 months ago	Annual change
Selected world indicator prices							
AUD/USD Exchange rate	04-Jun	A$/US$	0.65	0.65	0%	0.66	-3%
Wheat – US no. 2 hard red winter wheat, FOB Gulf	04-Jun	US$/t	241	237	1%	266	-9%
Corn – US no. 2 yellow corn, FOB Gulf	04-Jun	US$/t	199	205	-3%	191	4%
Canola – Rapeseed, Canada, FOB Vancouver	04-Jun	US$/t	539	559	-4%	490	10%
Cotton – Cotlook A Index	04-Jun	USc/lb	78	78	0%	83	-6%
Sugar – Intercontinental Exchange, nearby futures, no.11 contract	04-Jun	USc/lb	17	17	-1%	19	-11%
Wool – Eastern Market Indicator	04-Jun	Ac/kg clean	1,199	1,204	0%	1,156	4%
Wool – Western Market Indicator	28-May	Ac/kg clean	1,366	1,364	0%	1,290	6%
Selected Australian grain export prices							
Australian Premium White (APW) Wheat, FOB Port Adelaide, SA	04-Jun	A$/t	387	395	-2%	440	-12%
Australian Standard White (ASW) Wheat, FOB Port Adelaide, SA	04-Jun	A$/t	382	390	-2%	431	-11%
Feed Barley – FOB Port Adelaide, SA	04-Jun	A$/t	372	376	-1%	379	-2%
Canola – FOB Kwinana, WA	04-Jun	A$/t	795	802	-1%	758	5%
Grain Sorghum – FOB Brisbane, QLD	04-Jun	A$/t	426	427	0%	441	-3%
Selected domestic livestock indicator prices							
Beef – Eastern Young Cattle Indicator	04-Jun	Ac/kg cwt	727	713	2%	595	22%
Mutton – Mutton indicator (18–24 kg fat score 2–3), VIC	04-Jun	Ac/kg cwt	627	594	6%	349	80%
Lamb – National Trade Lamb Indicator	04-Jun	Ac/kg cwt	980	932	5%	714	37%
Pig – Eastern Seaboard (60.1–75 kg), NSW buyer price	21-May	Ac/kg cwt	447	445	0%	411	9%
Live cattle – Light steers to Indonesia	04-Jun	Ac/kg lwt	345	345	0%	305	13%
Global Dairy Trade (GDT) weighted average prices							
Dairy – Whole milk powder	04-Jun	US$/t	4,173	4,332	-4%	3,436	21%
Dairy – Skim milk powder	04-Jun	US$/t	2,807	2,817	0%	2,744	2%
Dairy – Cheddar cheese	04-Jun	US$/t	4,759	5,007	-5%	4,227	13%
Dairy – Anhydrous milk fat	04-Jun	US$/t	7,373	7,273	1%	7,367	0%

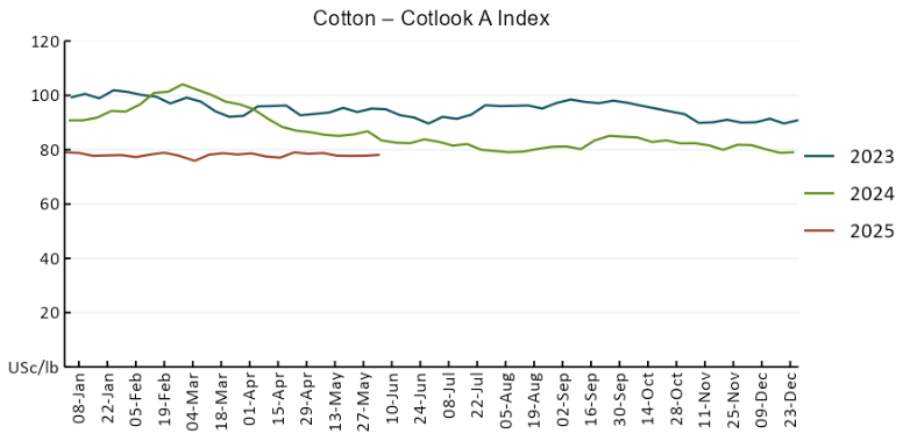
3.1. Selected world indicator prices

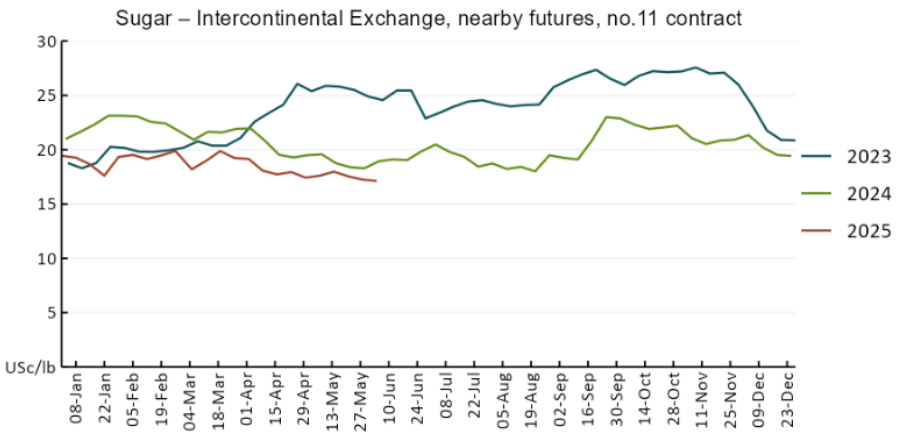


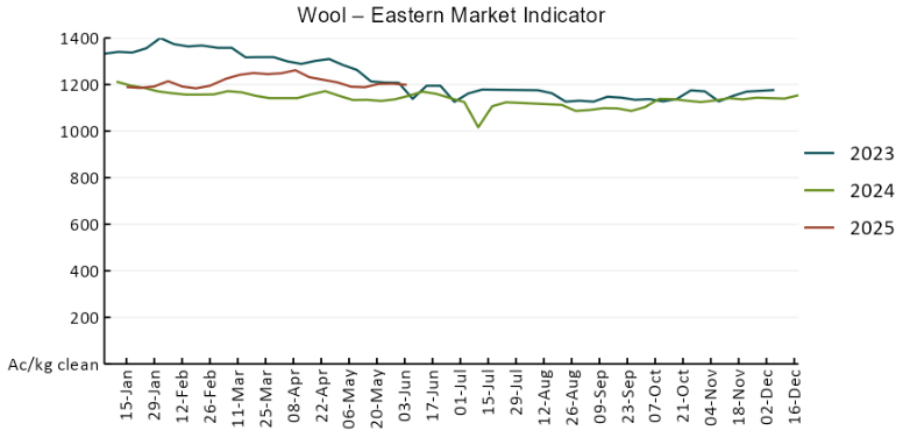


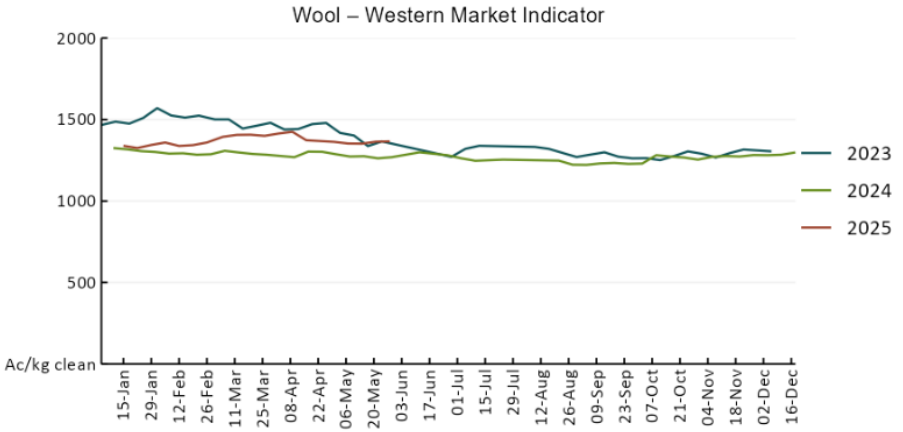




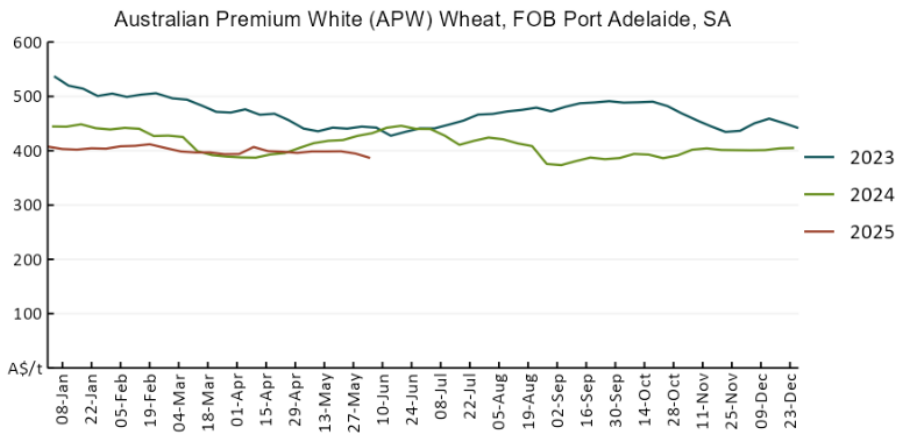

Cotton – Cotlook A Index
120
100
80
60
40
20
USc/lb
08-Jan
22-Jan
05-Feb
19-Feb
04-Mar
18-Mar
01-Apr
15-Apr
29-Apr
13-May
27-May
10-Jun
24-Jun
08-Jul
22-Jul
05-Aug
19-Aug
02-Sep
16-Sep
30-Sep
14-Oct
28-Oct
11-Nov
25-Nov
09-Dec
23-Dec
2023
2024
2025

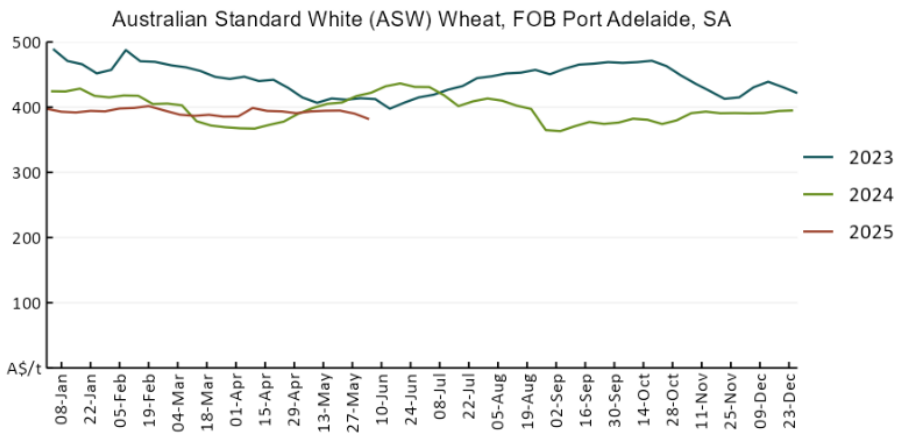

Sugar – Intercontinental Exchange, nearby futures, no.11 contract
30
25
20
15
10
5
USc/lb
08-Jan
22-Jan
05-Feb
19-Feb
04-Mar
18-Mar
01-Apr
15-Apr
29-Apr
13-May
27-May
10-Jun
24-Jun
08-Jul
22-Jul
05-Aug
19-Aug
02-Sep
16-Sep
30-Sep
14-Oct
28-Oct
11-Nov
25-Nov
09-Dec
23-Dec
2023
2024
2025

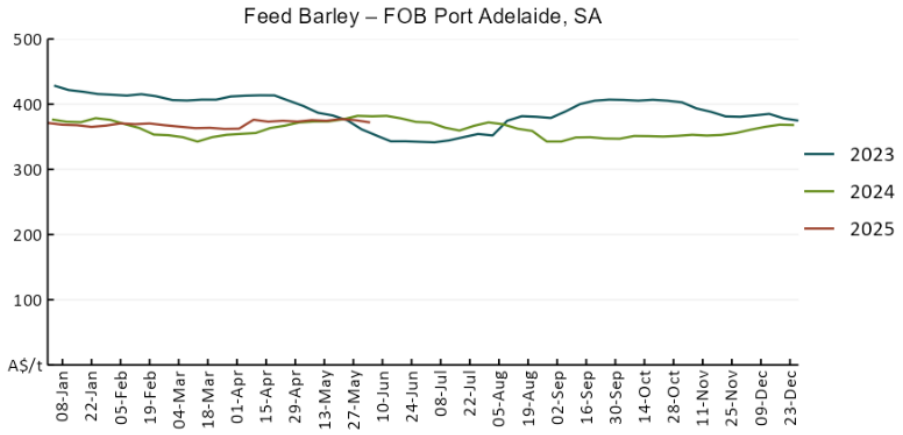

Wool – Eastern Market Indicator
1400
1200
1000
800
600
400
200
Ac/kg clean
15-Jan
29-Jan
12-Feb
26-Feb
11-Mar
25-Mar
08-Apr
22-Apr
06-May
20-May
03-Jun
17-Jun
01-Jul
15-Jul
29-Jul
12-Aug
26-Aug
09-Sep
23-Sep
07-Oct
21-Oct
04-Nov
18-Nov
02-Dec
16-Dec
2023
2024
2025

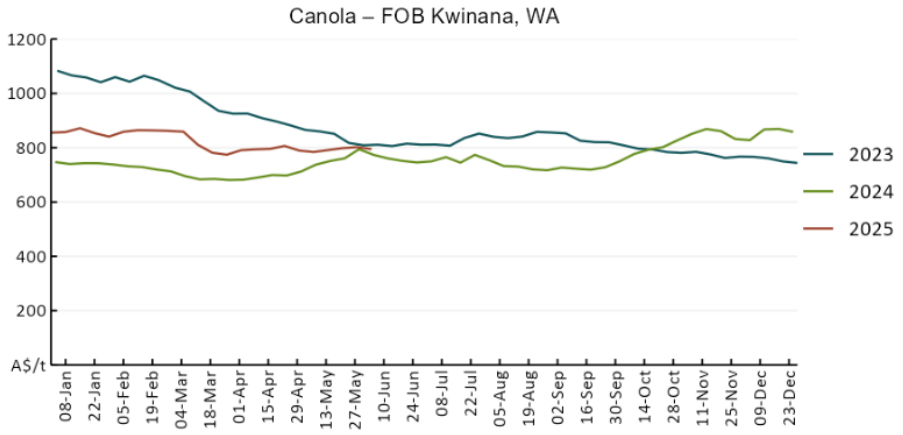

Wool – Western Market Indicator
2000
1500
1000
500
Ac/kg clean
15-Jan
29-Jan
12-Feb
26-Feb
11-Mar
25-Mar
08-Apr
22-Apr
06-May
20-May
03-Jun
17-Jun
01-Jul
15-Jul
29-Jul
12-Aug
26-Aug
09-Sep
23-Sep
07-Oct
21-Oct
04-Nov
18-Nov
02-Dec
16-Dec
2023
2024
2025

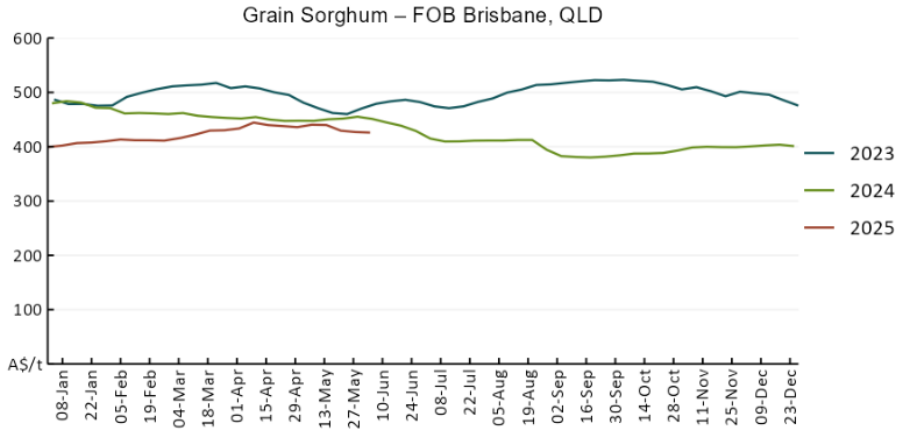
3.2 Selected domestic crop indicator prices



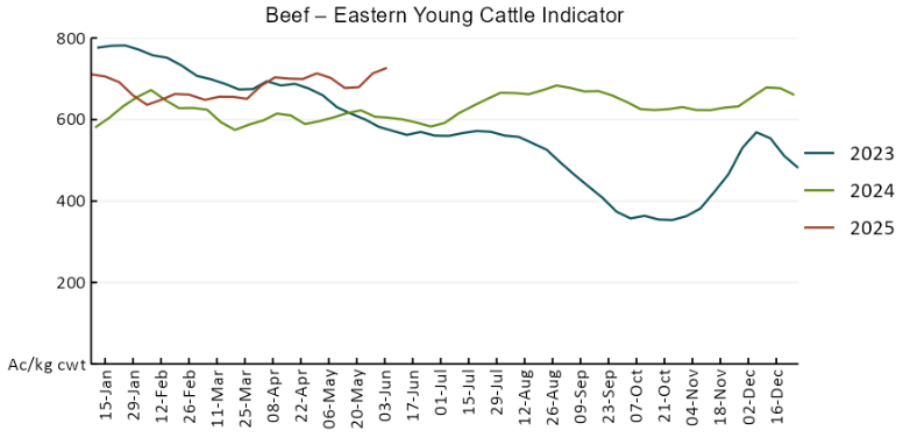


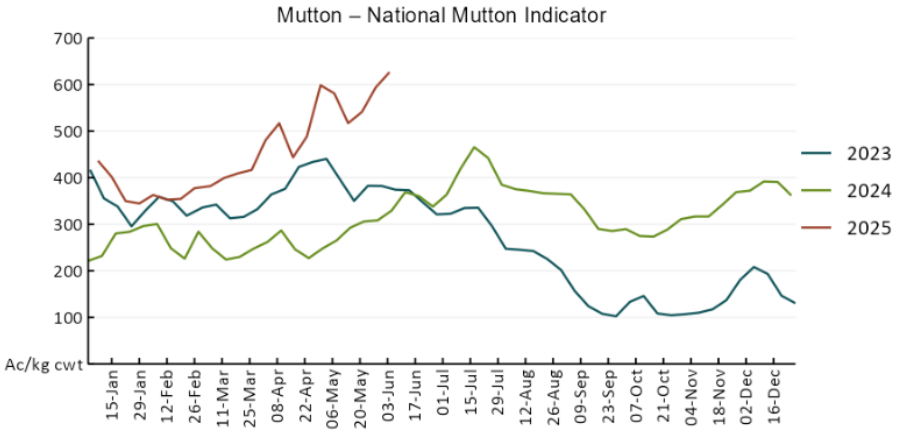


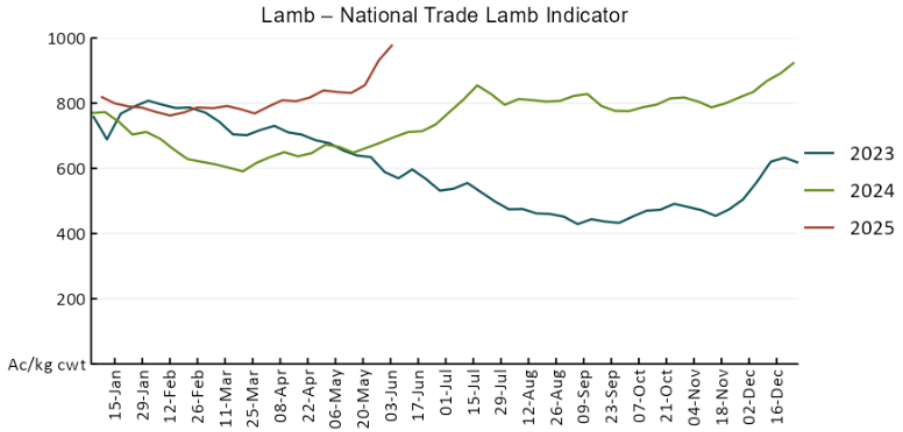


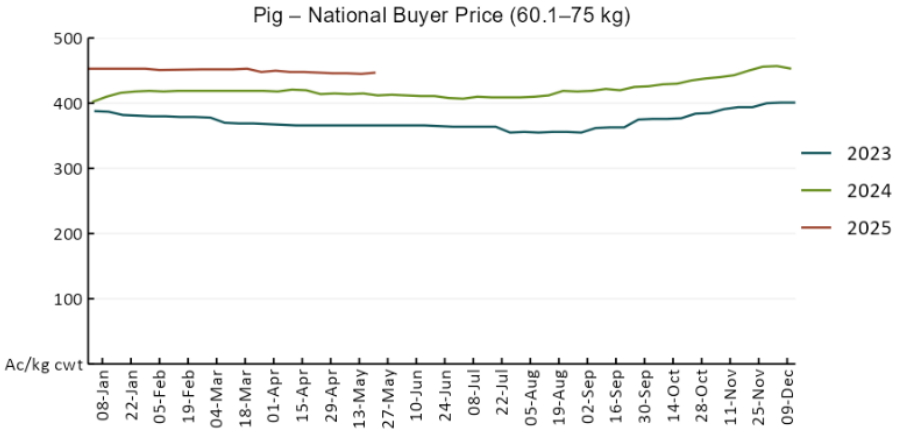

Grain Sorghum – FOB Brisbane, QLD
600
500
400
300
200
100
A$/t
08-Jan
22-Jan
05-Feb
19-Feb
04-Mar
18-Mar
01-Apr
15-Apr
29-Apr
13-May
27-May
10-Jun
24-Jun
08-Jul
22-Jul
05-Aug
19-Aug
02-Sep
16-Sep
30-Sep
14-Oct
28-Oct
11-Nov
25-Nov
09-Dec
23-Dec
2023
2024
2025

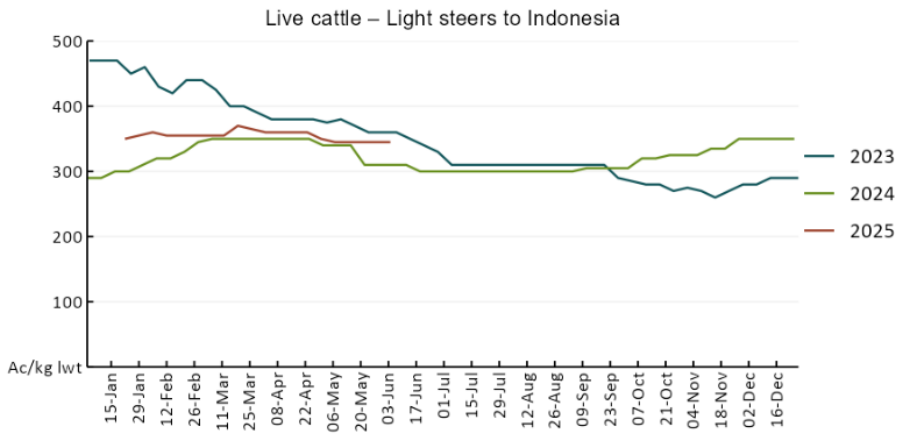
3.3 Selected domestic livestock indicator prices



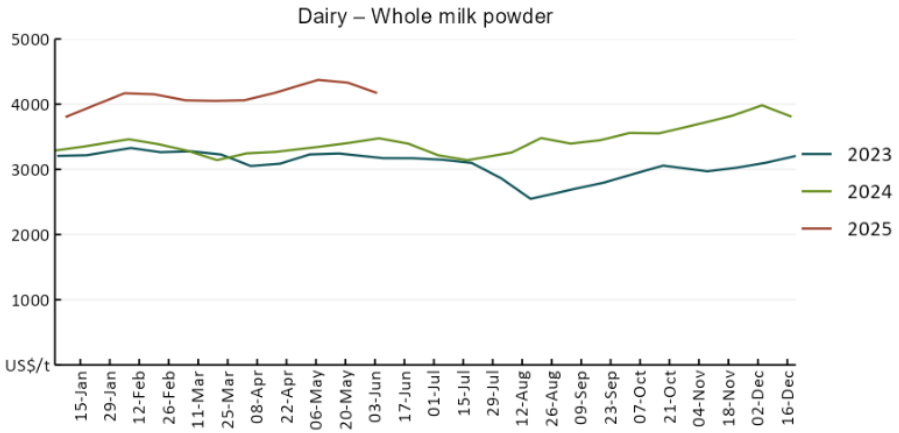


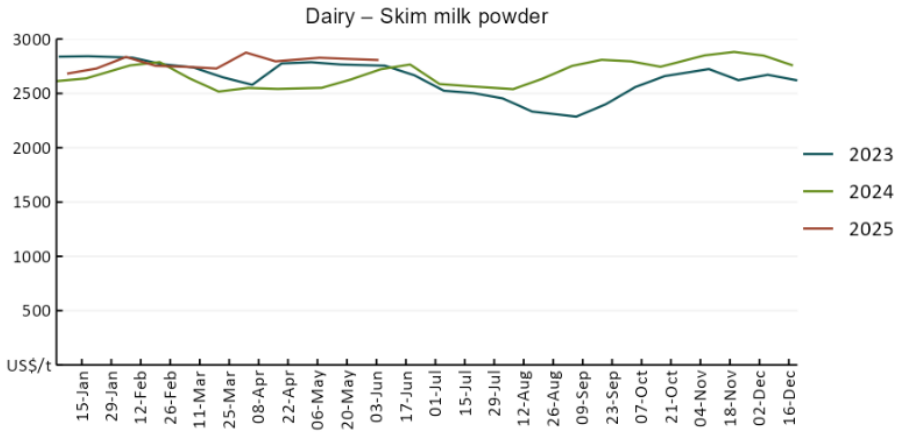


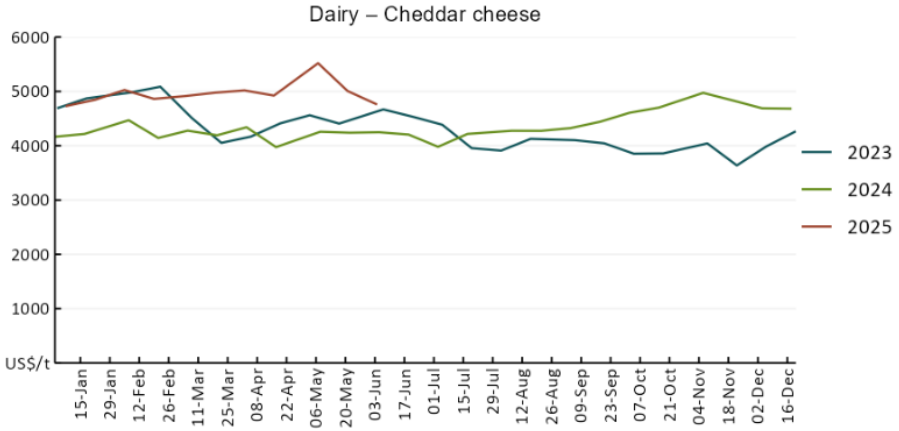


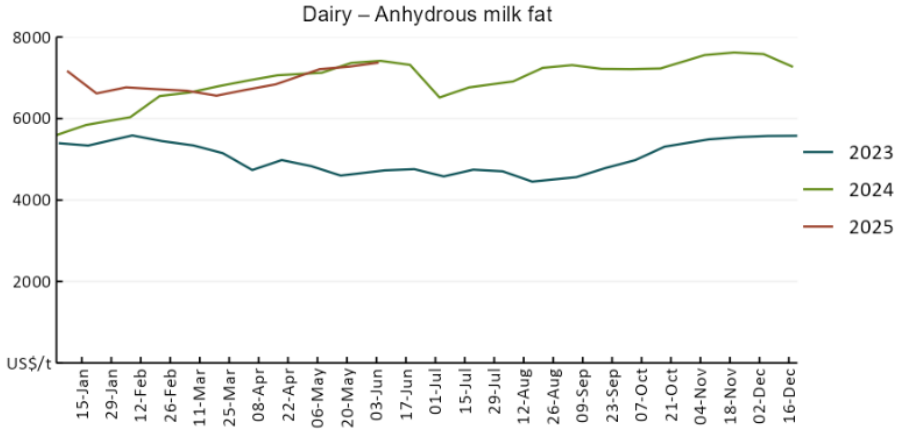

Live cattle – Light steers to Indonesia
500
400
300
200
100
Ac/kg lwt
15-Jan
29-Jan
12-Feb
26-Feb
11-Mar
25-Mar
08-Apr
22-Apr
06-May
20-May
03-Jun
17-Jun
01-Jul
15-Jul
29-Jul
12-Aug
26-Aug
09-Sep
23-Sep
07-Oct
21-Oct
04-Nov
18-Nov
02-Dec
16-Dec
2023
2024
2025

3.4 Global Dairy Trade (GDT) weighted average prices

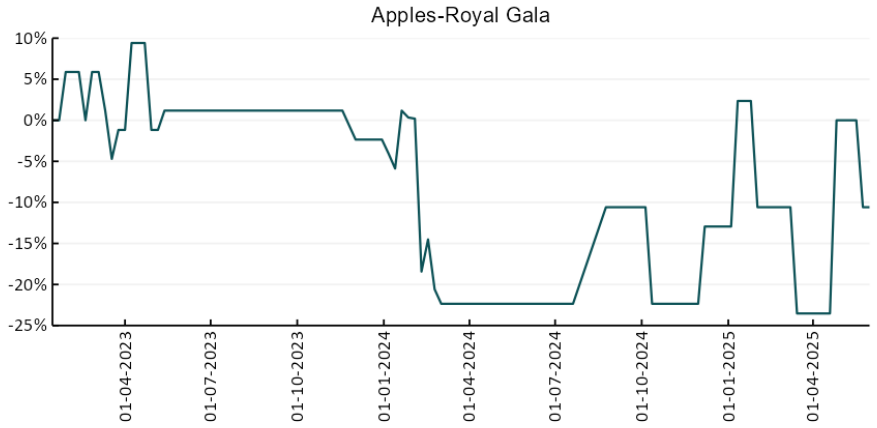


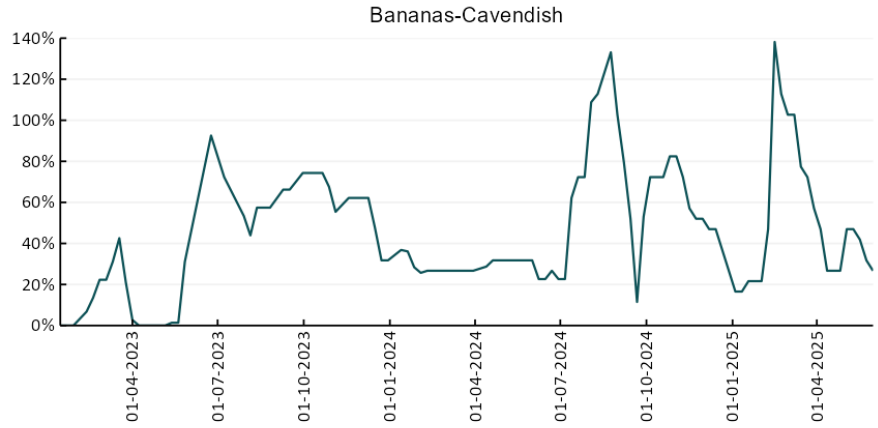


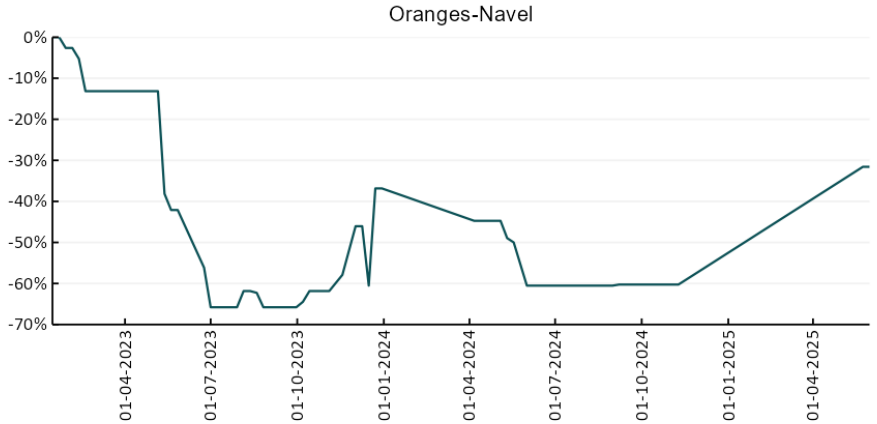


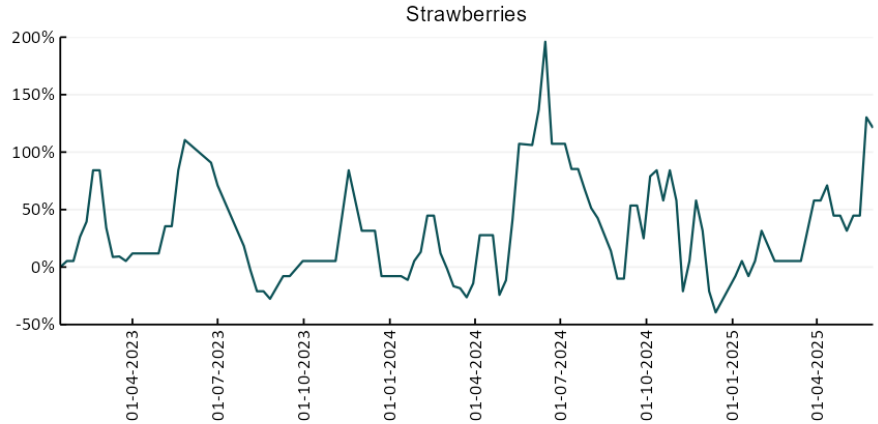


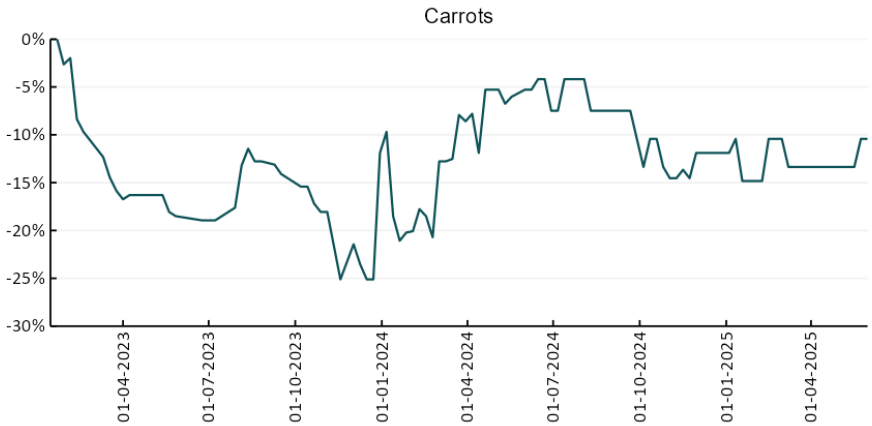
3.5 Selected fruit and vegetable prices

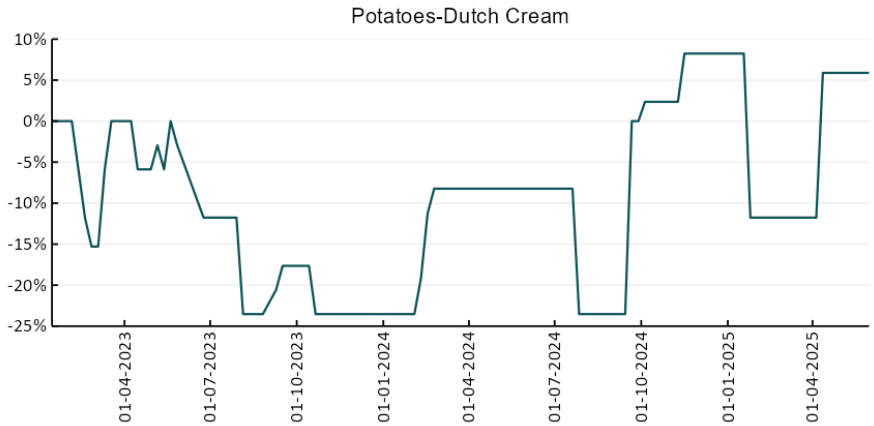


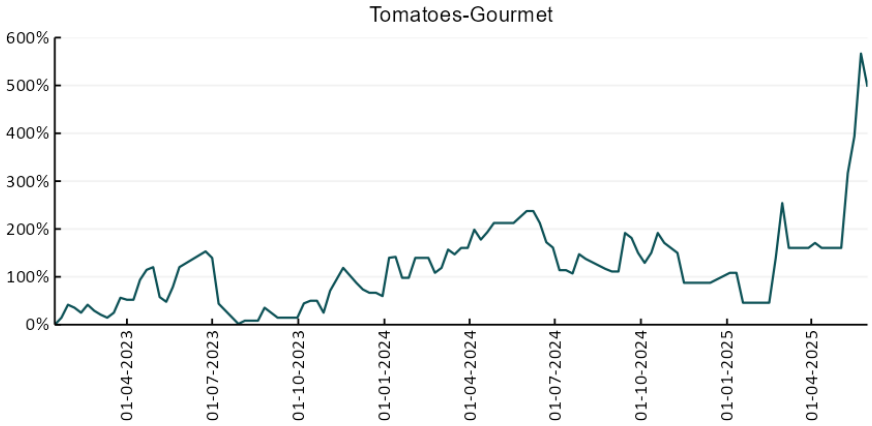


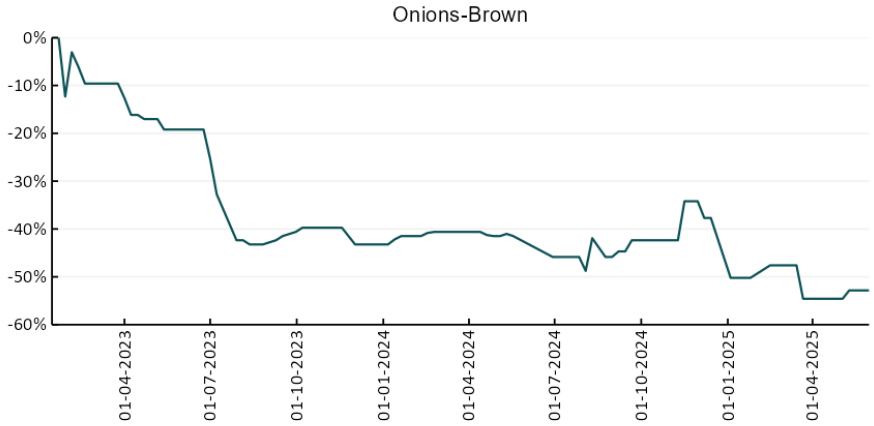




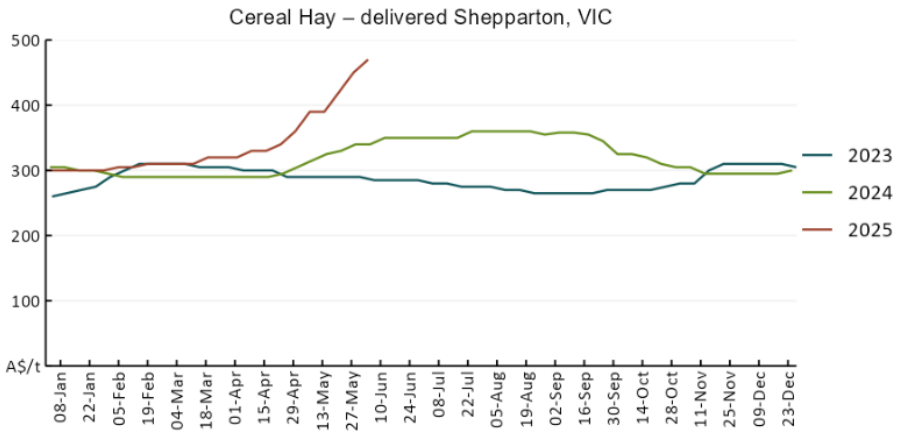

Carrots
0%
-5%
-10%
-15%
-20%
-25%
-30%
01-04-2023
01-07-2023
01-10-2023
01-01-2024
01-04-2024
01-07-2024
01-10-2024
01-01-2025
01-04-2025

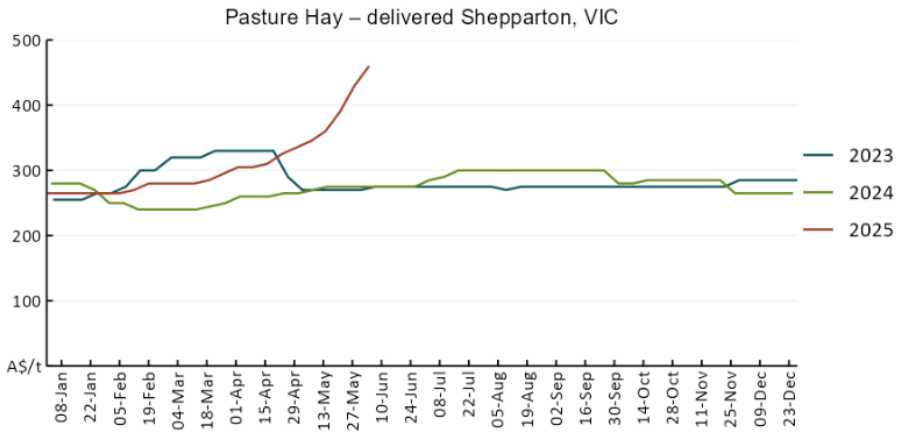

Potatoes-Dutch Cream
10%
5%
0%
-5%
-10%
-15%
-20%
-25%
01-04-2023
01-07-2023
01-10-2023
01-01-2024
01-04-2024
01-07-2024
01-10-2024
01-01-2025
01-04-2025

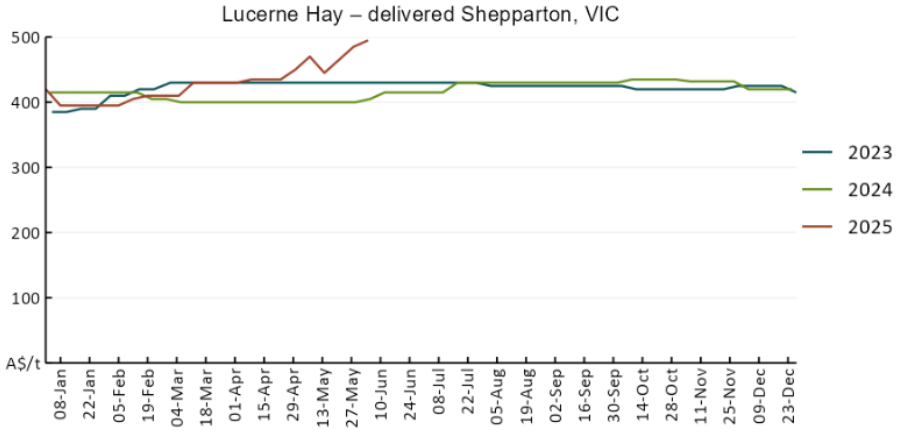

Tomatoes-Gourmet
600%
500%
400%
300%
200%
100%
0%
01-04-2023
01-07-2023
01-10-2023
01-01-2024
01-04-2024
01-07-2024
01-10-2024
01-01-2025
01-04-2025


Onions-Brown
0%
-10%
-20%
-30%
-40%
-50%
-60%
01-04-2023
01-07-2023
01-10-2023
01-01-2024
01-04-2024
01-07-2024
01-10-2024
01-01-2025
01-04-2025

3.6 Selected domestic fodder indicator prices







4. Data attribution

Climate

- Bureau of Meteorology
- Weekly rainfall totals: www.bom.gov.au/climate/maps/rainfall/
- Monthly and last 3-month rainfall percentiles: www.bom.gov.au/water/landscape/
- Temperature anomalies: www.bom.gov.au/jsp/awap/temp/index.jsp
- Rainfall forecast: www.bom.gov.au/jsp/watl/rainfall/pme.jsp
- Seasonal outlook: www.bom.gov.au/climate/outlooks/#/overview/summary/
- Climate drivers: http://www.bom.gov.au/climate/enso/
- Soil moisture: www.bom.gov.au/water/landscape/
    - Other
- Pasture growth: www.longpaddock.qld.gov.au/aussiegrass/
- 3-month global outlooks: Environment and Climate Change Canada, NOAA Climate Prediction Center, EUROBRISA CPTEC/INPE, European Centre for Medium-Range Weather Forecasts, Hydrometcenter of Russia, National Climate Center Climate System Diagnosis and Prediction Room (NCC), International Research Institute for Climate and Society
- Global production: https://ipad.fas.usda.gov/ogamaps/cropmapsandcalendars.aspx
- Autumn break: Pook et al., 2009, https://rmets-onlinelibrary-wiley-com.virtual.anu.edu.au/doi/epdf/10.1002/joc.1833

Water

Prices

- Waterflow: https://www.waterflow.io/
    - Ruralco: https://www.ruralcowater.com.au/
    - Bureau of Meteorology:
- Allocation trade: http://www.bom.gov.au/water/dashboards/#/water-markets/mdb/at
- Storage volumes: http://www.bom.gov.au/water/dashboards/#/water-storages/summary/drainage
    - Trade constraints:
- Water NSW: https://www.waternsw.com.au/customer-service/ordering-trading-and-pricing/trading/murrumbidgee
- Victorian Water Register: https://www.waterregister.vic.gov.au/TradingRules2019/

Commodities

- Fruit and vegetables
    - Datafresh: www.freshstate.com.au
    - Pigs
- Australian Pork Limited: www.australianpork.com.au
    - Dairy
- Global Dairy Trade: www.globaldairytrade.info/en/product-results/
    - 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
- Australian Wool Exchange: www.awex.com.au/
    - Domestic wheat, barley, sorghum, canola and fodder
- Jumbuk Consulting Pty Ltd: http://www.jumbukag.com.au/
    - Cattle, beef, mutton, lamb, goat and live export
- Meat and Livestock Australia: www.mla.com.au/Prices-and-market

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