Australian Government
Department of Agriculture, Fisheries and Forestry

ABARES

Weekly Australian Climate, Water and Agricultural Update

No. 25/2025

26 June 2025

Summary of key issues

- In the week ending 25 June 2025 cold fronts and low-pressure systems brought rainfall to parts of southern and north-eastern Australia.
  - Across cropping regions rainfall totals of between 5-50 millimetres occurred over much of Western Australia, South Australia, Victoria and New South Wales. The Mallee regions of South Australia and Victoria, parts of northern New South Wales and Queensland stayed dry.
  - Further rainfall will be required across parts of southern Western Australia, and the Mallee regions in South Australia and Victoria in the coming weeks to support the establishment of newly germinated crops.
- Over the coming eight days, rainfall is expected across much of eastern and south-western Australia, while central regions are likely to stay dry.
  - In Western Australian, Queensland and northern New South Wales cropping regions between 5-25 millimetres is expected over this period. If realised, this should provide sufficient moisture to support the establishment and growth of winter crops.
  - Little to no rainfall is forecast for cropping regions in South Australia, Victoria, and southern New South Wales. This is likely to present an escalating downside production risk for winter crops across the Mallee regions of South Australia and Victoria that have received sufficient rainfall to germinate dry sown crops but little follow-up rainfall to support their establishment.
- The **national rainfall outlook** for July to September 2025 indicates an increased probability of above median rainfall across much of inland and northern Australia. However, some southern regions are likely to see below median rainfall.
  - If realised, the expectation of close to average July to September 2025 rainfall across most winter cropping regions is likely be sufficient to support the establishment and growth of winter crops.
- Water storage levels in the Murray-Darling Basin (MDB) increased by 102 gigalitres (GL) between 19 June 2025 and 26 June 2025. The current volume of water held in storages is 13,001 GL, equivalent to 58% of total storage capacity. This is 25% or 4,324 GL less than 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 $311/ML on 19 June 2025 to $301/ML on 26 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

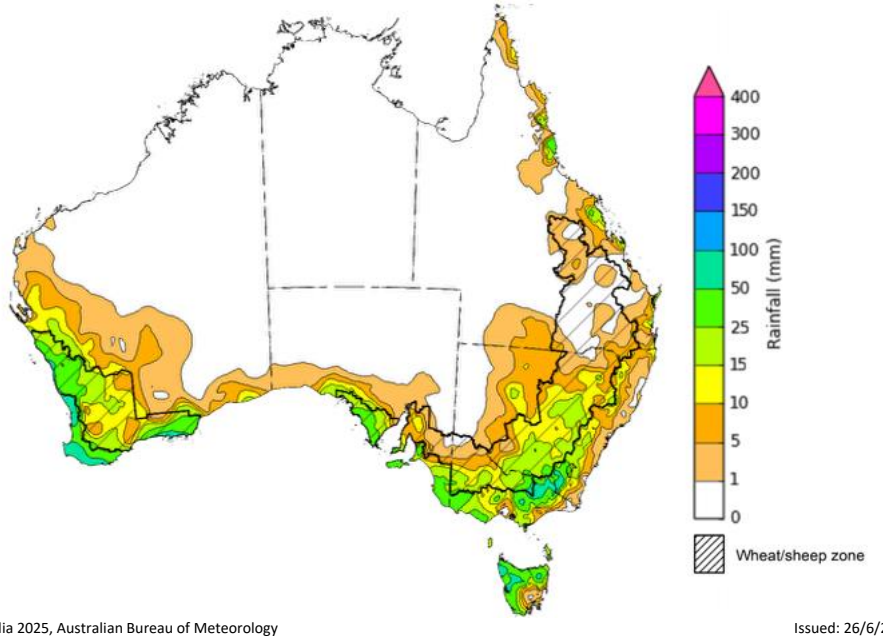
In the week ending 25 June 2025, **cold fronts and low-pressure systems** brought rainfall to parts of southern and north-eastern Australia, while high-pressure systems kept the rest of Australia largely dry.

- Rainfall totals of between 5-100 millimetres were recorded across much of central and eastern New South Wales, Victoria, the southwest of Western Australia and Tasmania.
- Meanwhile falls of between 5-50 millimetres were observed across much of southern South Australia and isolated coastal areas of Queensland.
- Remaining regions received little to no rainfall over this period.

Rainfall was recorded across cropping regions in the south, while north-eastern areas remained largely dry in the week ending 25 June 2025.

- Rainfall totals of between 5-50 millimetres occurred over much of Western Australia, South Australia, Victoria and New South Wales.
- In contrast, the Mallee regions of South Australia and Victoria, parts of northern New South Wales and Queensland where comparatively dry, with falls of between 0-5 millimetres being recorded.
    - These falls have provided some useful follow-up moisture to those regions that received rainfall last week and much of New South Wales. However, further rainfall will be required across parts of southern Western Australia, and the Mallee regions in South Australia and Victoria in the coming weeks to support the establishment of newly germinated crops.

Rainfall for the week ending 25 June 2025



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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. Rainfall forecast for the next eight days

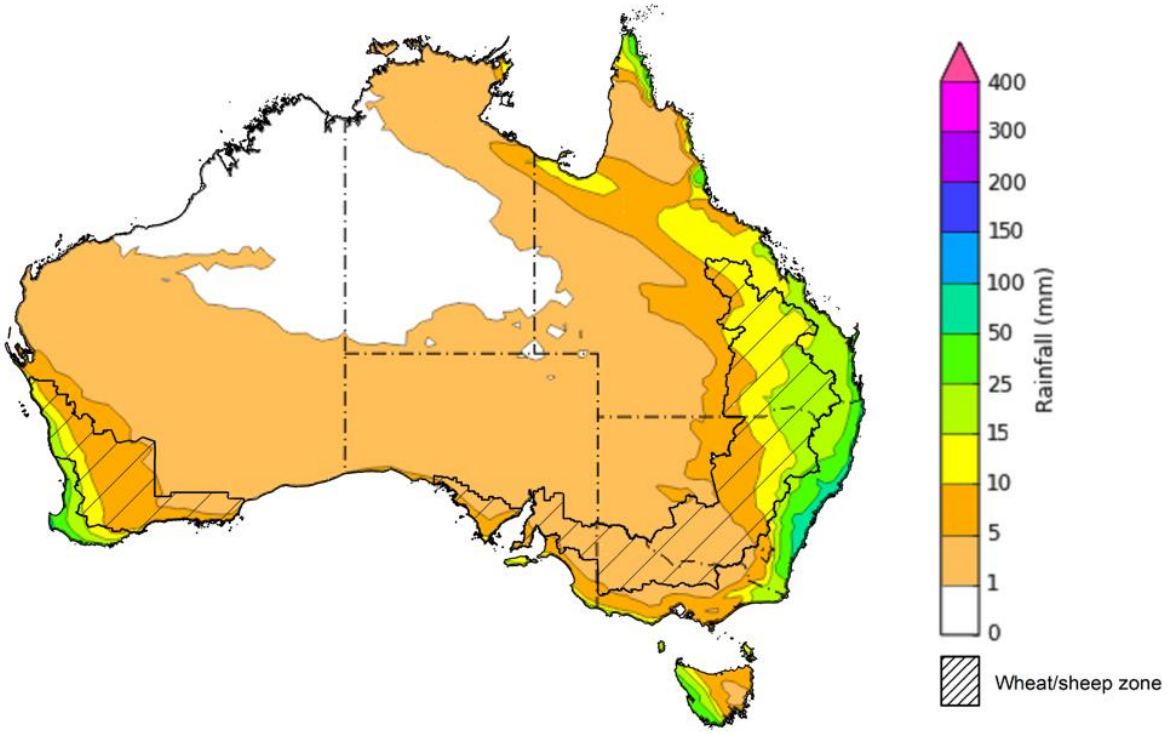
Over the 8 days to 3 July 2025, **low-pressure systems** are expected to bring rainfall to large areas of eastern Australia and parts of south-western Australia, with high-pressure systems expected to keep central and northern regions largely dry.

- Large areas of south-western Western Australia, eastern Queensland, and Tasmania are expected to see between 5-50 millimetres, with some regions in eastern New South Wales to see falls of up to 100 millimetres.
- Parts of southern Victoria and South Australia are expected to record between 5-25 millimetres in isolated areas.
- Little to no rainfall is expected across much of the remainder of the country over this period.

Some timely rainfall is expected across eastern and western cropping regions over the coming week, with little expected in the south.

- In Western Australia, Queensland and central and northern New South Wales between 5-25 millimetres is expected over this period. If realised, this should provide timely moisture to support the establishment and growth of winter crops following a relatively dry June.
- Meanwhile, little to no rainfall is expected in South Australia, Victoria and southern New South Wales. If realised, this presents an escalating downside production risk for winter crops across the Mallee regions of South Australia and Victoria that have received sufficient rainfall to germinate dry sown crops but little follow-up rainfall to support their establishment.

Total forecast rainfall for the period 26 June to 3 July 2025



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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.

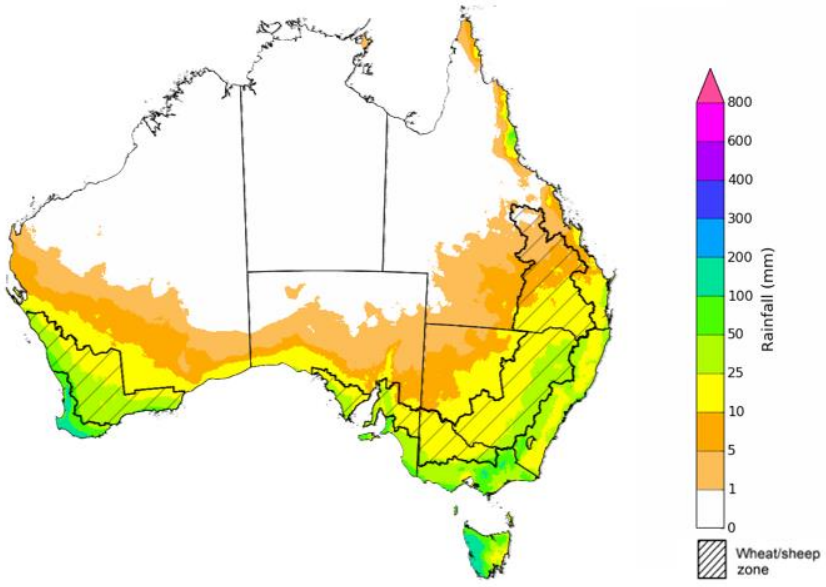
1.3 National Climate Outlook

The El Niño Southern Oscillation (ENSO), Southern Annular Mode (SAM), and Indian Ocean Dipole (IOD) climate drivers are currently neutral and having minimal influence on Australian rainfall. The ENSO is likely to remain neutral until November. Meanwhile, the Bureau of Meteorology's model predicts a fall in the IOD index dipping into negative IOD values over the coming months . This is consistent with a range of international models that are also predicting a fall in the IOD index. A negative IOD typically results in above-average winter–spring rainfall over parts of southern Australia as the warmer waters off northwest Australia provide more available moisture to weather systems crossing the country.

The most recent **rainfall outlook for July 2025** provided by the Bureau of Meteorology indicates that much of eastern and central Australia is likely to see **close to or above median rainfall.** However**,** large areas of south-eastern, south-western and northern Australia are more likely to see below median rainfall.

- The Bureau of Meteorology's climate model indicates a 75% chance of July rainfall totals between 10-100 millimetres across much of southern Australia, including Victoria, central and eastern New South Wales, south-eastern Queensland and southern South Australia. Tasmania and southern Western Australia are expected to see between 10-200 millimetres.
- Lower rainfall totals are expected across central and northern Australia, with much of northern Western Australia, the Northern Territory, northern South Australia, and central and northern Queensland likely to see little to no rainfall, which is quite typical for this time of year.
- Across cropping regions, there is a **75% chance** of rainfall totals of between **10-50 millimetres across most southern cropping regions.** If realised, this is expected to provide sufficient moisture to support the establishment and growth of winter crops across most southern growing regions. In contrast, most Queensland cropping regions are likely to see largely dry conditions. These lower expected rainfall totals are unlikely to adversely impact crop growth as crops will be able to utilise soil moisture reserves to support growth and development.

Rainfall totals that have a 75% chance of occurring in July 2025



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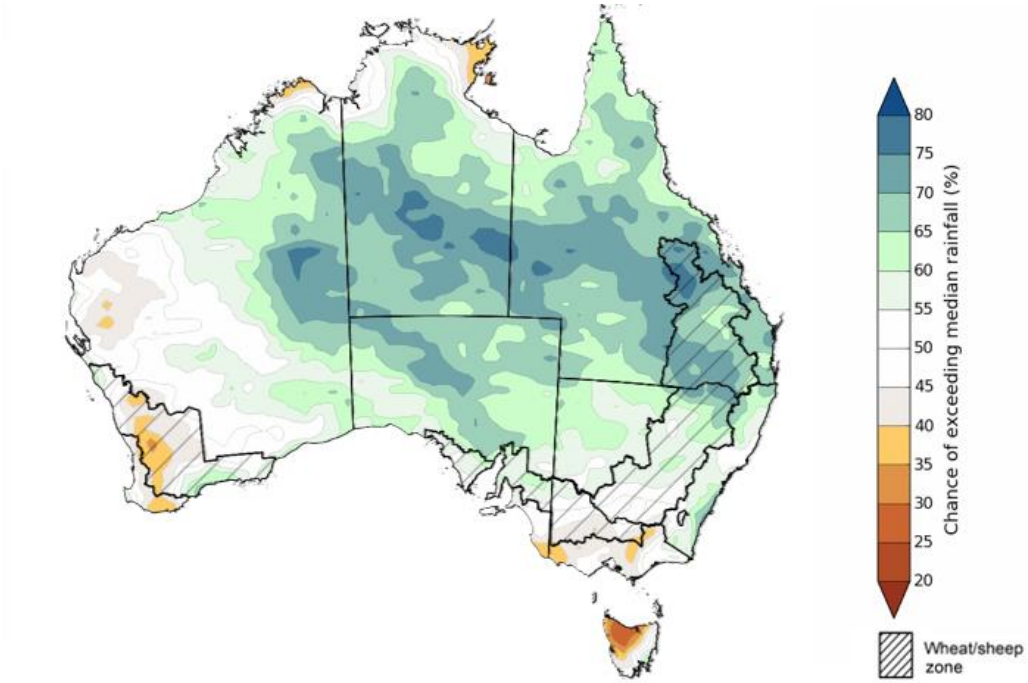
The **rainfall outlook for July to September 2025** indicates an increased probability of **above median rainfall across much of inland and northern Australia,** including much of eastern Western Australia, the Northern Territory, South Australia, northern New South Wales and Queensland. In contrast, some southern regions are more likely to see below median rainfall, including parts of south-western Western Australia, Victoria and Tasmania.

Across cropping regions, the chance of receiving above median rainfall is between 60-80% across Queensland, 50%-75% in New South Wales, and 30-65% in Western Australia over this period. In South Australia and Victoria the probability of below or above median rainfall is largely equal.

Chance of exceeding the median rainfall July 2025 to September 2025



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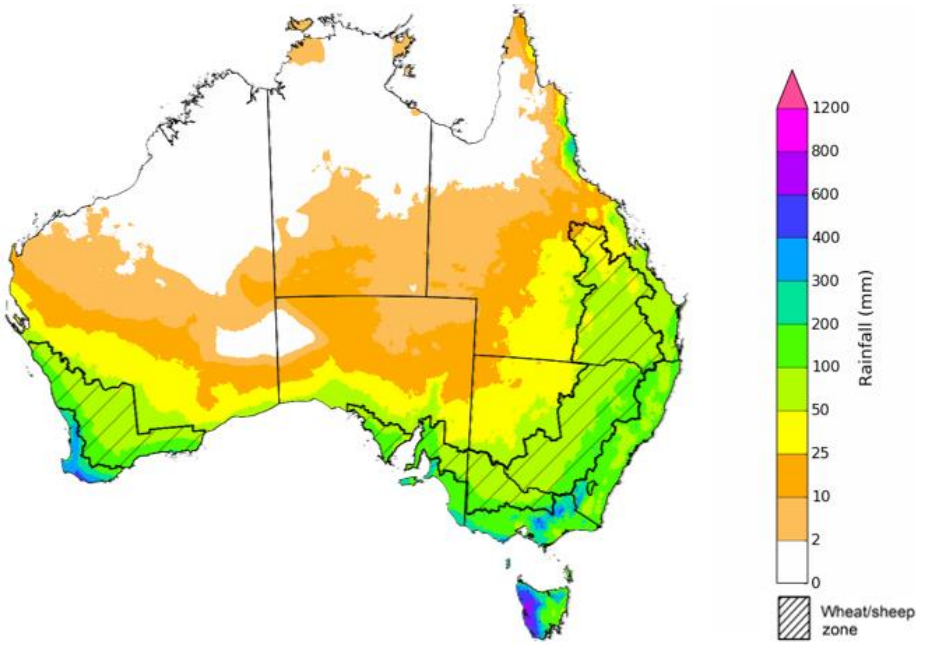
The **rainfall outlook for July through to September 2025** suggests a 75% chance of receiving rainfall totals of between 200–600 millimetres across the far south-west of Western Australia, western Tasmania, and alpine areas of New South Wales and Victoria. Between 25–200 millimetres of rainfall are forecast across much of south-eastern Queensland, New South Wales, Victoria, southern South Australia, south-western Western Australia and eastern Tasmania. In northern and central Australia, little to no rainfall is forecast over the period.

In **cropping regions**, there is a **75% chance** of receiving between **50-200 millimetres** in the south, including Western Australia, South Australia, Victoria and New South Wales. In Queensland, falls of 10-100 millimetres are expected. If realised, these falls are likely be sufficient to support the establishment and growth of winter crops.

Rainfall totals that have a 75% chance of occurring July 2025 to September 2025



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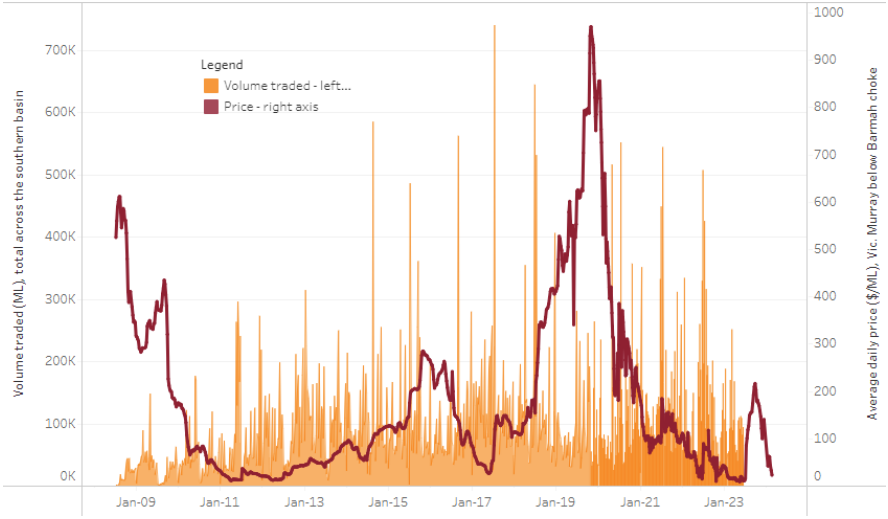
2.1. Water markets – current week

Water storage levels in the Murray-Darling Basin (MDB) increased by 102 gigalitres (GL) between 19 June 2025 and 26 June 2025. The current volume of water held in storages is 13,001 GL, equivalent to 58% of total storage capacity. This is 25% or 4,324 GL less than 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 $311/ML on 19 June 2025 to $301/ML on 26 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



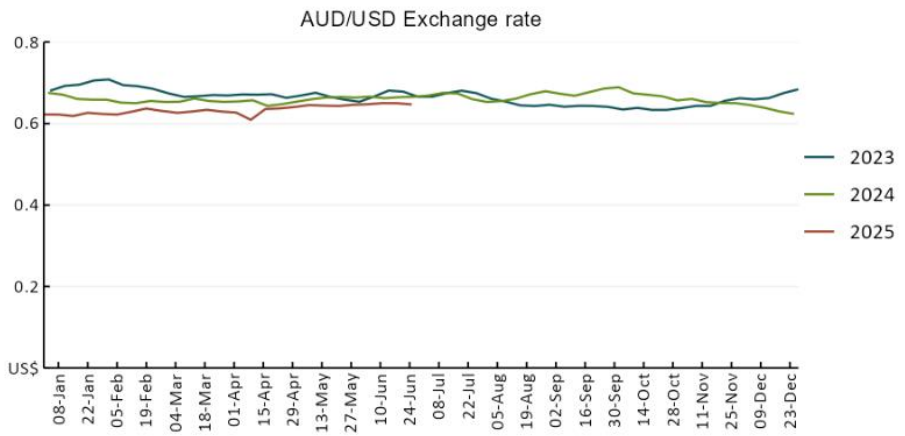
The trades shown reflect estimated market activity and do not encompass all register trades. The price is shown for the VIC Murray below the Barmah choke. Historical prices (before 1 July 2019) are ABARES estimates after removing outliers from BOM water register data. Prices after 1 July 2019 and prior 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.

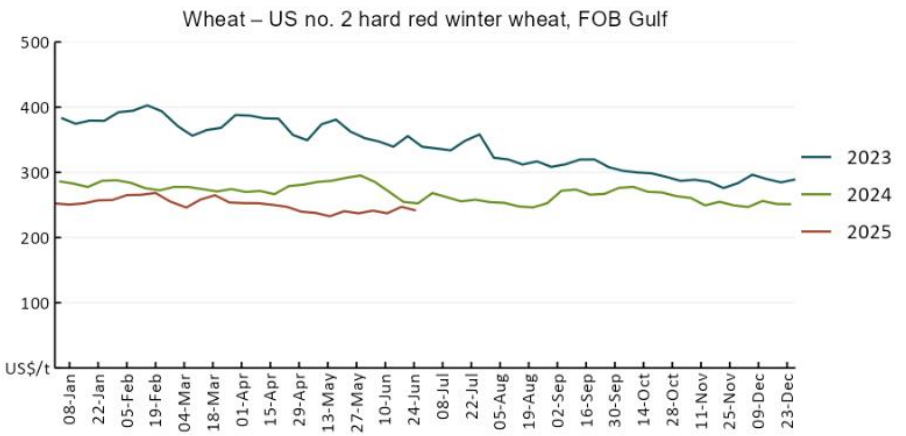
To access the full, interactive, weekly water dashboard, which contains the latest and historical water storage, water market and water allocation information, please visit https://www.agriculture.gov.au/abares/products/weekly_update/weekly-update-266525

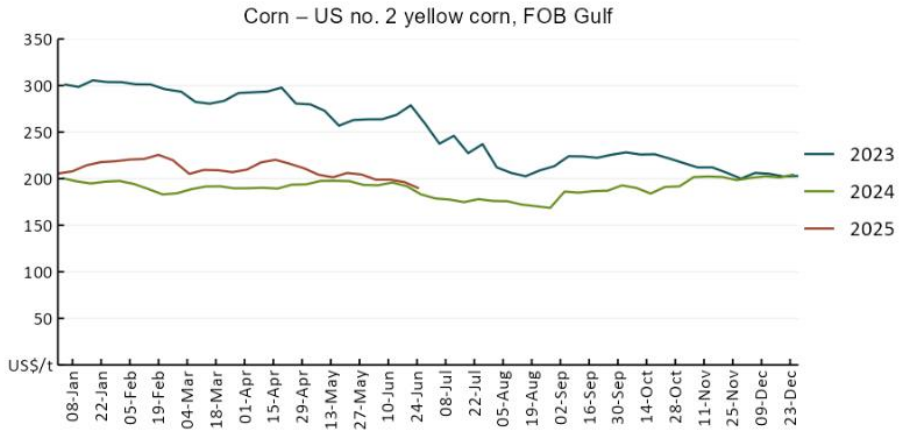
3. Commodities

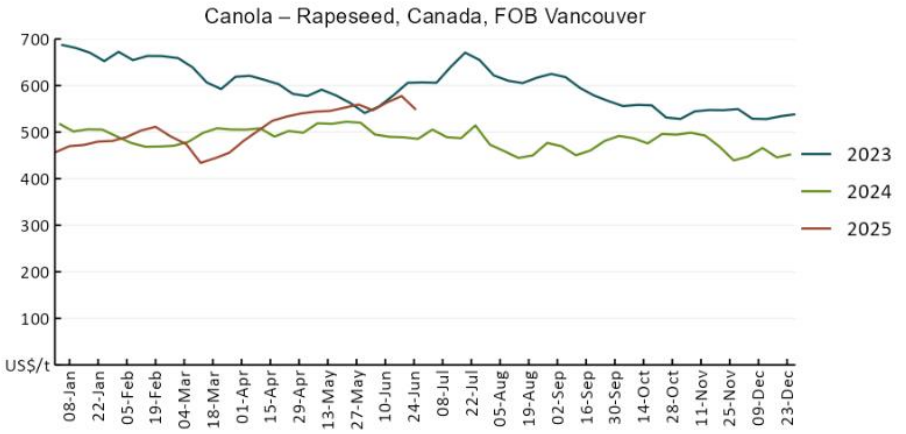
Indicator	Week average	Unit	Latest Price	Previous Week	Weekly change	Price 12 months ago	Annual change
Selected world indicator prices							
AUD/USD Exchange rate	25-Jun	A$/US$	0.65	0.65	0%	0.66	-3%
Wheat – US no. 2 hard red winter wheat, FOB Gulf	25-Jun	US$/t	242	247	-2%	266	-9%
Corn – US no. 2 yellow corn, FOB Gulf	25-Jun	US$/t	190	196	-3%	191	-1%
Canola – Rapeseed, Canada, FOB Vancouver	25-Jun	US$/t	548	578	-5%	490	12%
Cotton – Cotlook A Index	25-Jun	USc/lb	78	78	0%	83	-6%
Sugar – Intercontinental Exchange, nearby futures, no.11 contract	25-Jun	USc/lb	16	17	0%	19	-14%
Wool – Eastern Market Indicator	25-Jun	Ac/kg clean	1,207	1,207	0%	1,156	4%
Wool – Western Market Indicator	25-Jun	Ac/kg clean	1,354	1,366	-1%	1,290	5%
Selected Australian grain export prices							
Australian Premium White (APW) Wheat, FOB Port Adelaide, SA	25-Jun	A$/t	392	385	2%	440	-11%
Australian Standard White (ASW) Wheat, FOB Port Adelaide, SA	25-Jun	A$/t	388	380	2%	431	-10%
Feed Barley – FOB Port Adelaide, SA	25-Jun	A$/t	376	371	1%	379	-1%
Canola – FOB Kwinana, WA	25-Jun	A$/t	853	836	2%	758	13%
Grain Sorghum – FOB Brisbane, QLD	25-Jun	A$/t	423	424	0%	441	-4%
Selected domestic livestock indicator prices							
Beef – Eastern Young Cattle Indicator	25-Jun	Ac/kg cwt	700	706	-1%	595	18%
Mutton – Mutton indicator (18–24 kg fat score 2–3), VIC	25-Jun	Ac/kg cwt	656	676	-3%	349	88%
Lamb – National Trade Lamb Indicator	25-Jun	Ac/kg cwt	1,022	1,043	-2%	714	43%
Pig – Eastern Seaboard (60.1–75 kg), NSW buyer price	11-Jun	Ac/kg cwt	451	452	0%	411	10%
Live cattle – Light steers to Indonesia	25-Jun	Ac/kg lwt	335	335	0%	305	10%
Global Dairy Trade (GDT) weighted average prices							
Dairy – Whole milk powder	18-Jun	US$/t	4,084	4,173	-2%	3,436	19%
Dairy – Skim milk powder	18-Jun	US$/t	2,775	2,807	-1%	2,744	1%
Dairy – Cheddar cheese	18-Jun	US$/t	4,992	4,759	5%	4,227	18%
Dairy – Anhydrous milk fat	18-Jun	US$/t	7,276	7,373	-1%	7,367	-1%

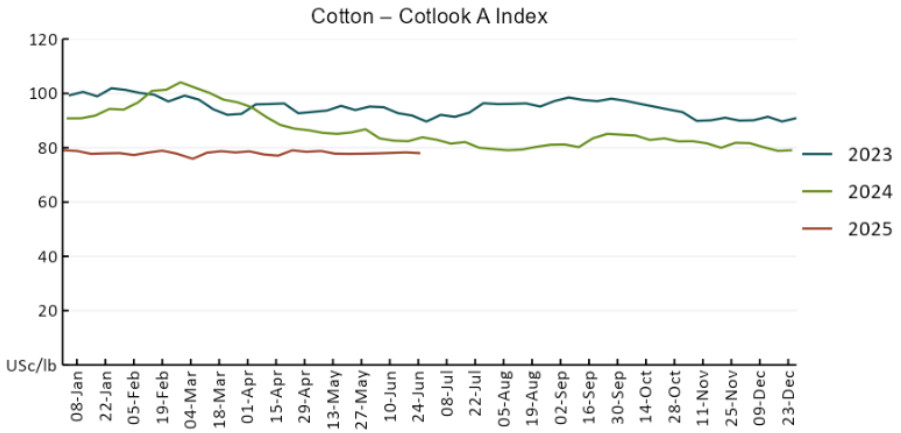
3.1. Selected world indicator prices

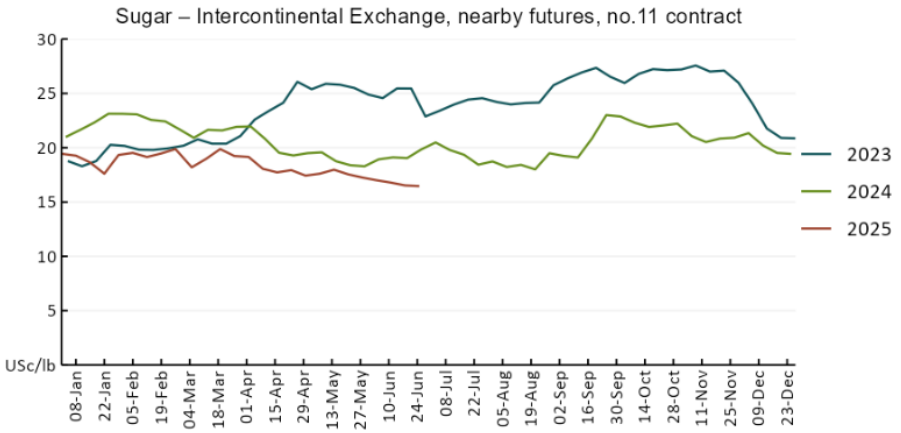









Cotton – Cotlook A Index
120
100
80
60
40
20
USc/lb
08-Jan
22-Jan
05-Feb
19-Feb
04-Mar
18-Mar
01-Apr
15-Apr
29-Apr
13-May
27-May
10-Jun
24-Jun
08-Jul
22-Jul
05-Aug
19-Aug
02-Sep
16-Sep
30-Sep
14-Oct
28-Oct
11-Nov
25-Nov
09-Dec
23-Dec
2023
2024
2025


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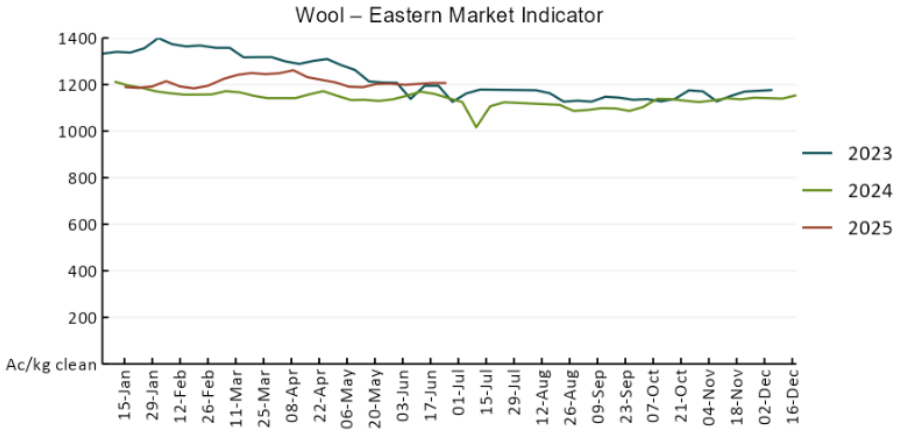
Wool – Eastern Market Indicator
1400
1200
1000
800
600
400
200
Ac/kg clean
15-Jan
29-Jan
12-Feb
26-Feb
11-Mar
25-Mar
08-Apr
22-Apr
06-May
20-May
03-Jun
17-Jun
01-Jul
15-Jul
29-Jul
12-Aug
26-Aug
09-Sep
23-Sep
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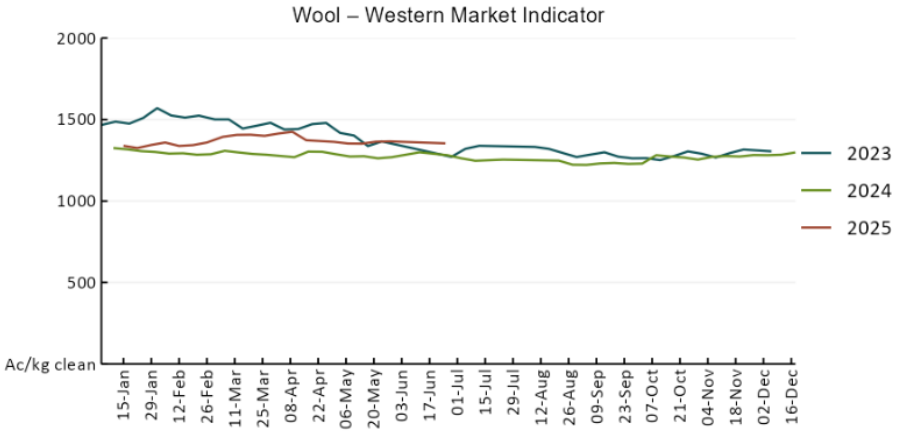
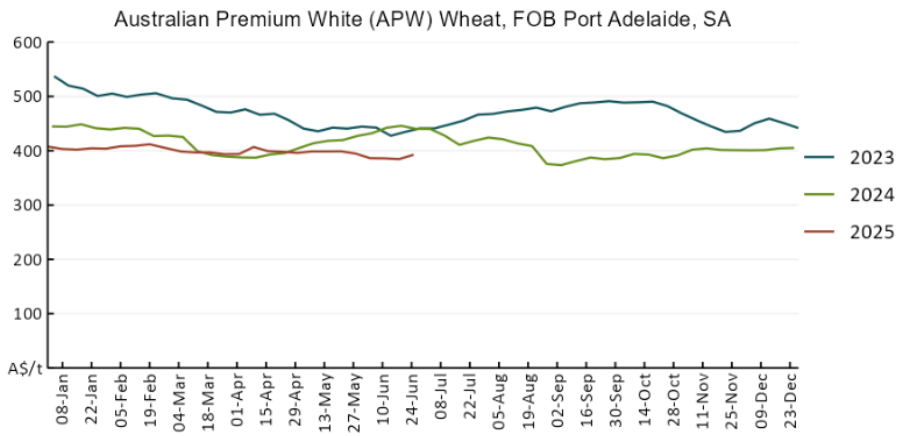
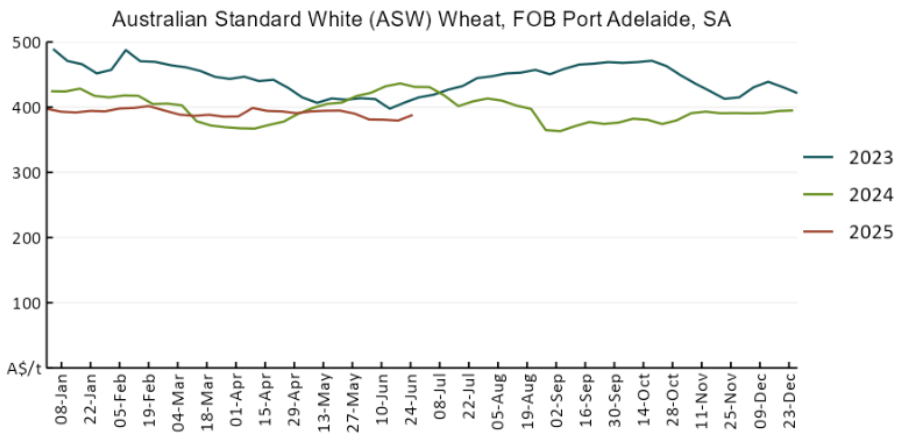
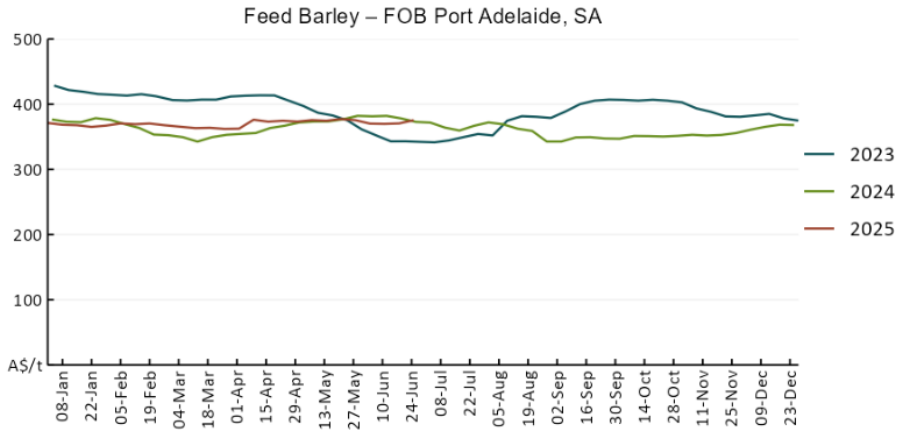
04-Nov
18-Nov
02-Dec
16-Dec
2023
2024
2025

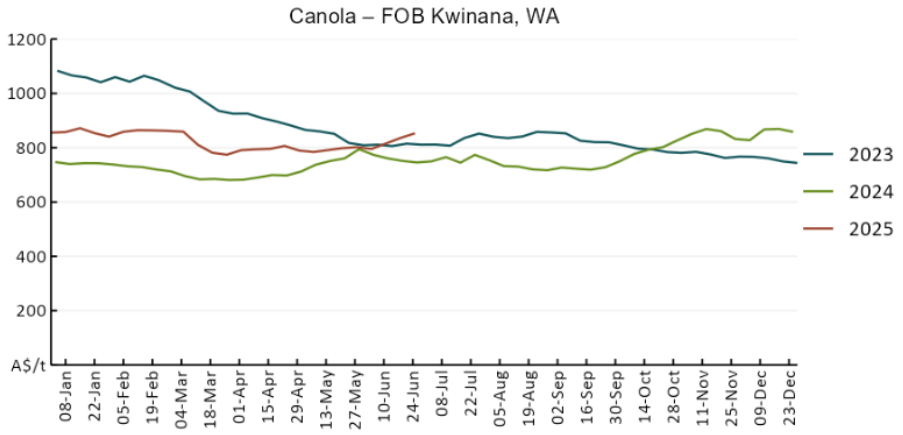

Wool – Western Market Indicator
2000
1500
1000
500
Ac/kg clean
15-Jan
29-Jan
12-Feb
26-Feb
11-Mar
25-Mar
08-Apr
22-Apr
06-May
20-May
03-Jun
17-Jun
01-Jul
15-Jul
29-Jul
12-Aug
26-Aug
09-Sep
23-Sep
07-Oct
21-Oct
04-Nov
18-Nov
02-Dec
16-Dec
2023
2024
2025

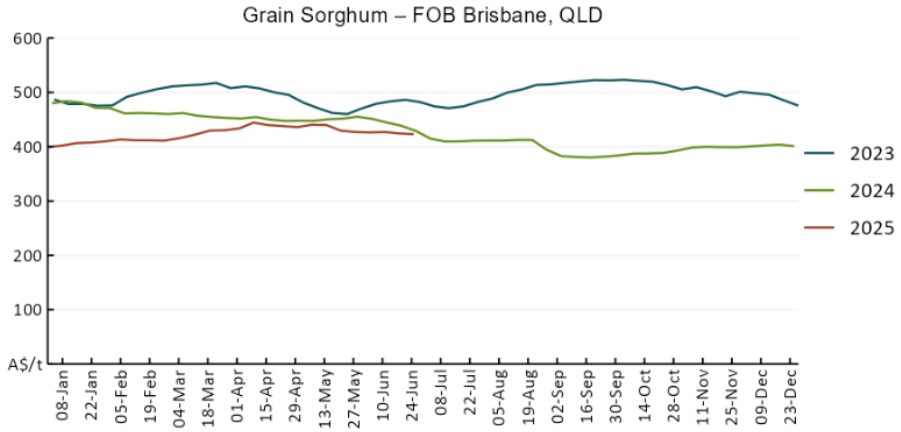
3.2 Selected domestic crop indicator prices










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
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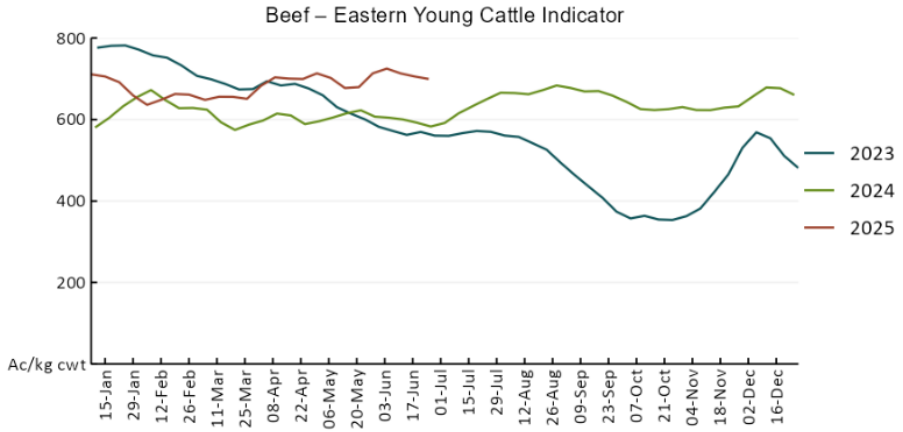
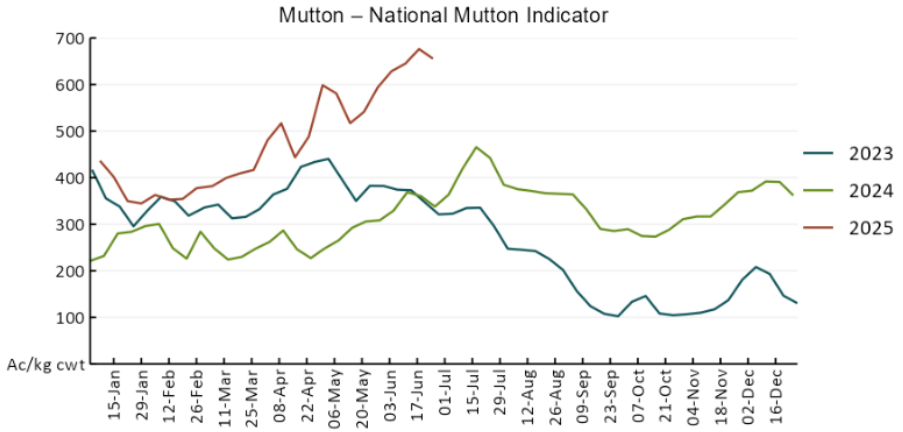
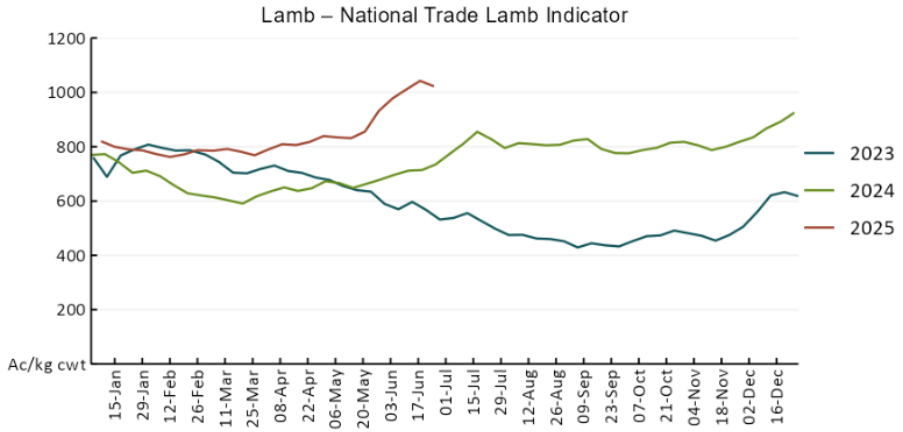
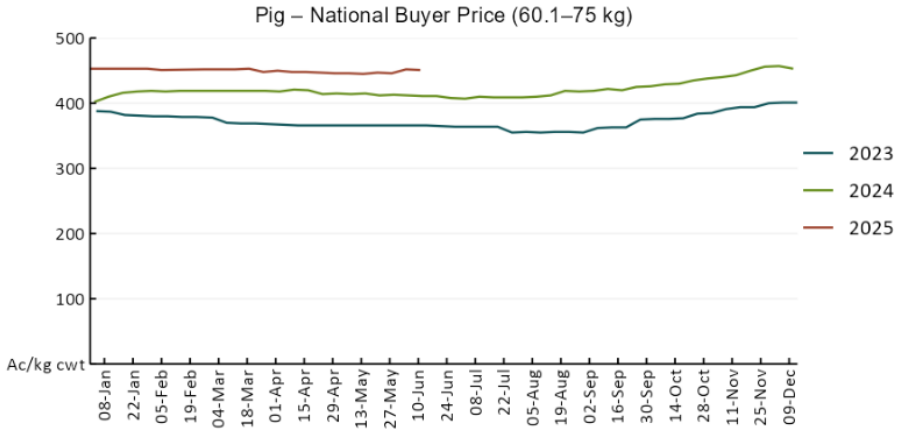
09-Dec
23-Dec
2023
2024
2025

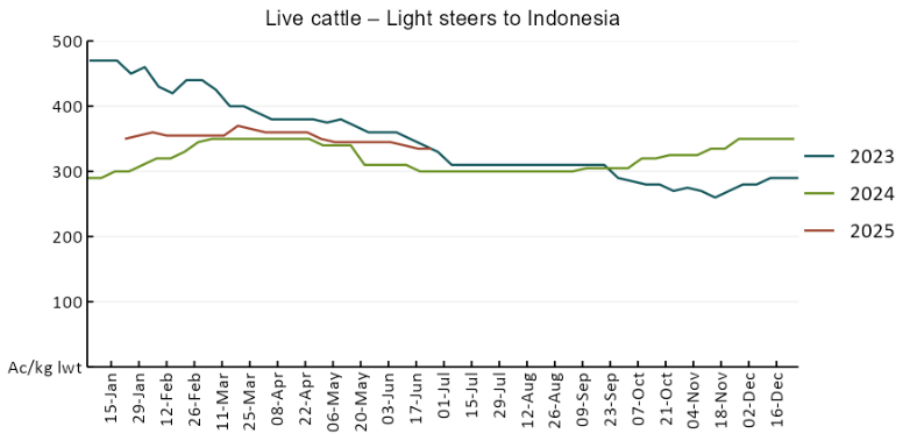
3.3 Selected domestic livestock indicator prices



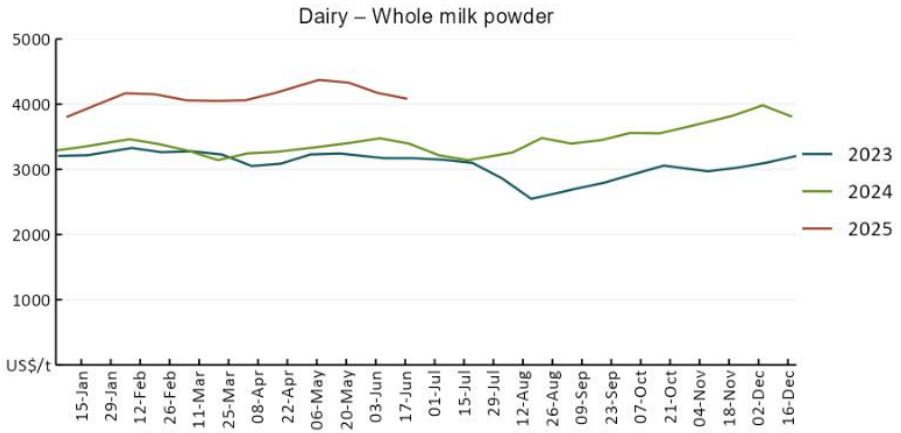


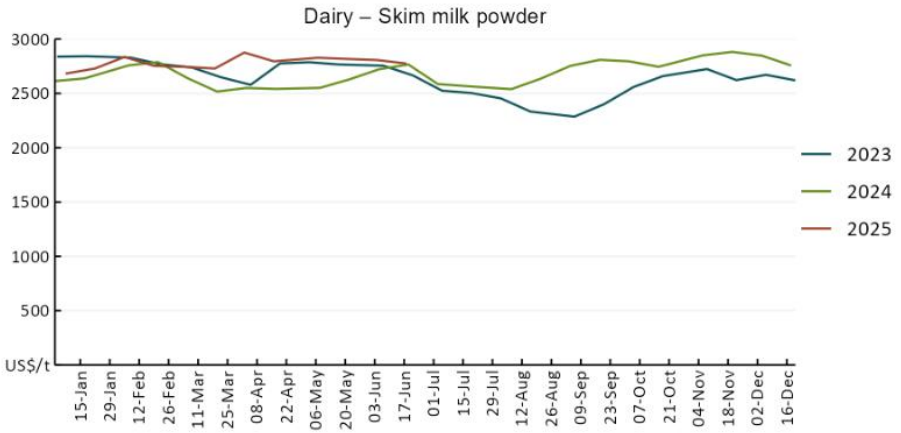


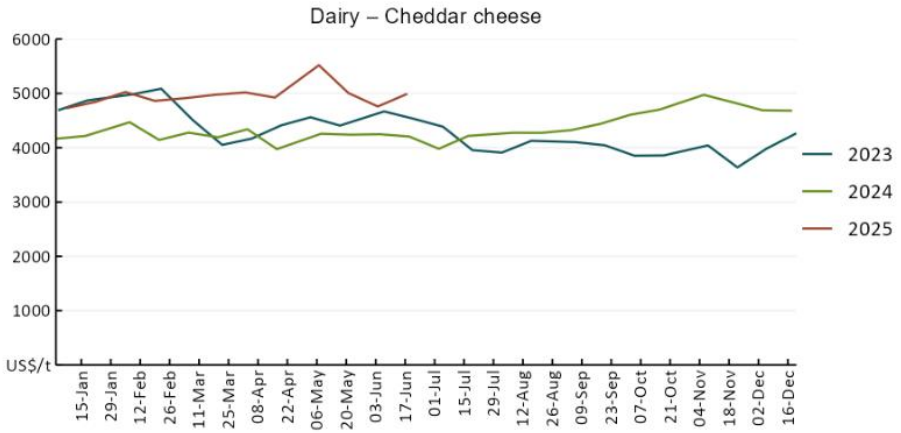


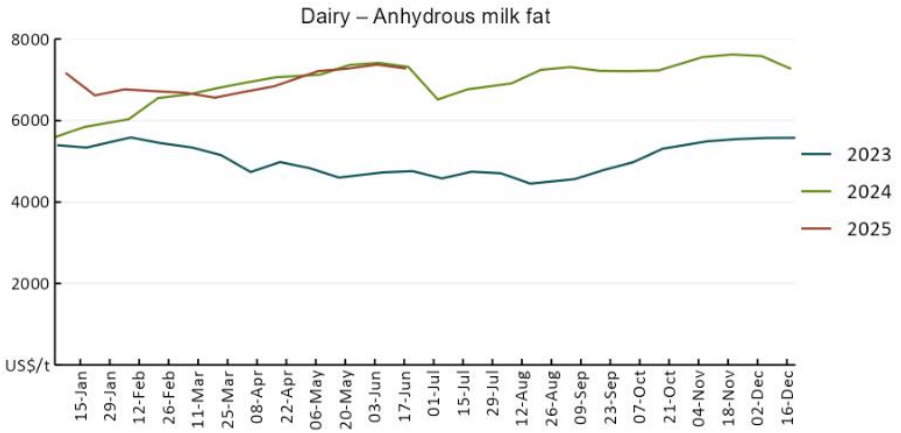

Live cattle – Light steers to Indonesia
500
400
300
200
100
Ac/kg lwt
15-Jan
29-Jan
12-Feb
26-Feb
11-Mar
25-Mar
08-Apr
22-Apr
06-May
20-May
03-Jun
17-Jun
01-Jul
15-Jul
29-Jul
12-Aug
26-Aug
09-Sep
23-Sep
07-Oct
21-Oct
04-Nov
18-Nov
02-Dec
16-Dec
2023
2024
2025

3.4 Global Dairy Trade (GDT) weighted average prices

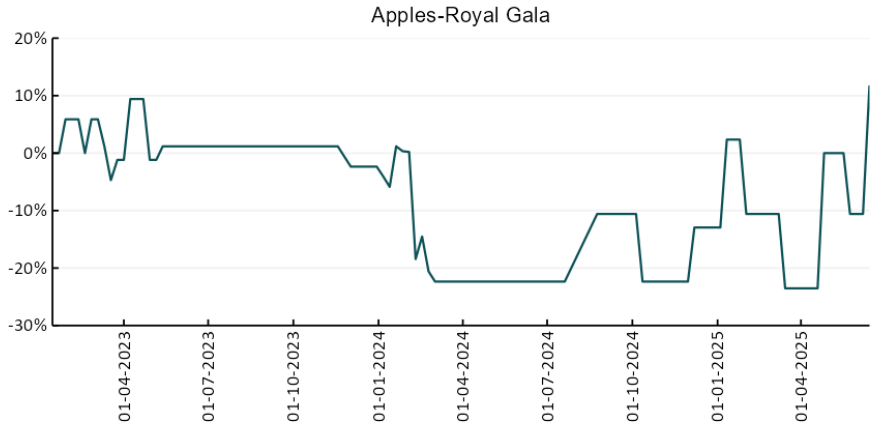


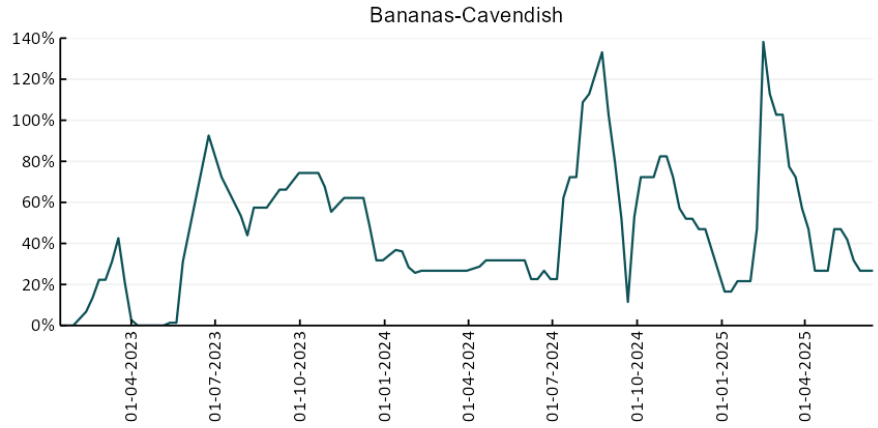


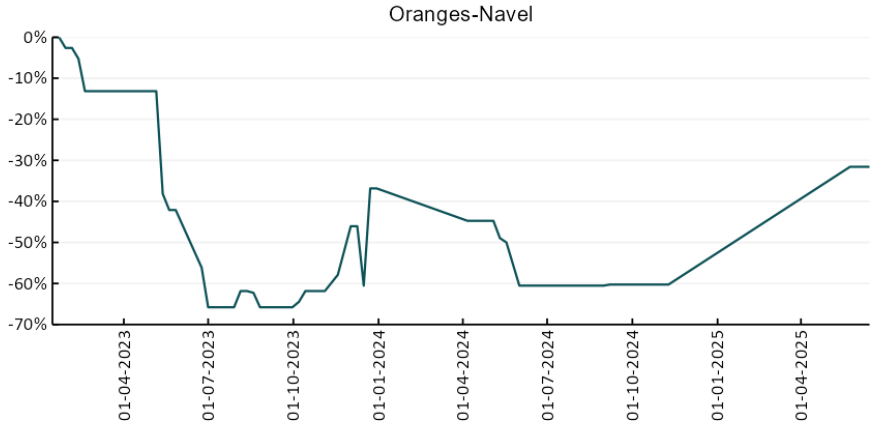


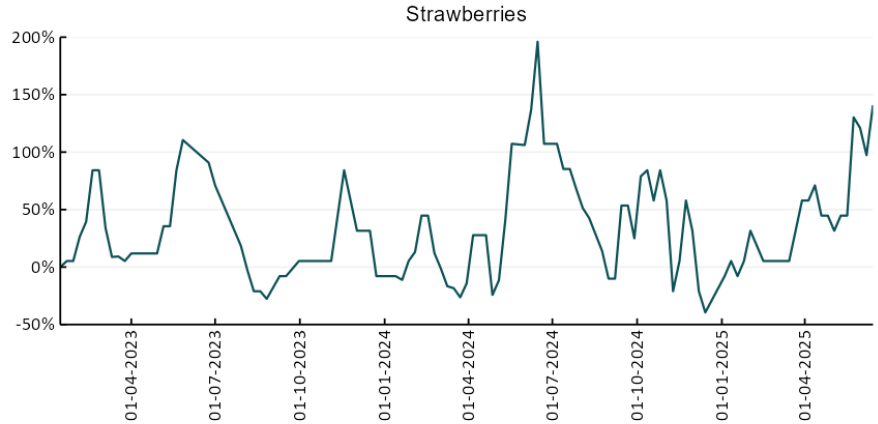


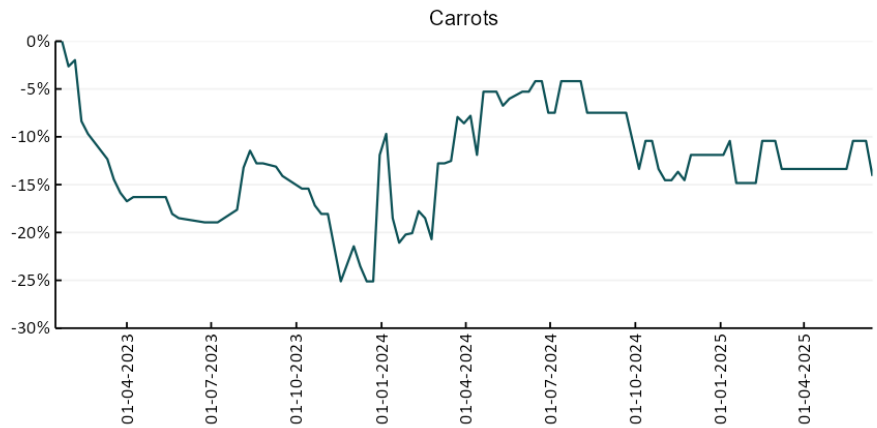
3.5 Selected fruit and vegetable prices

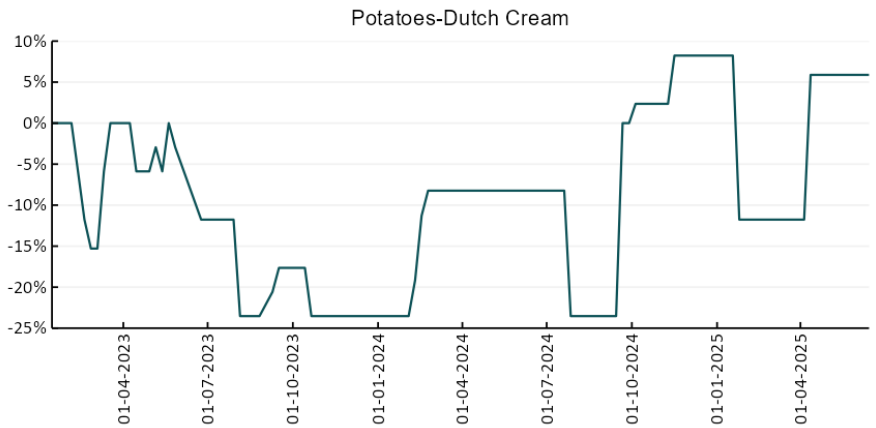


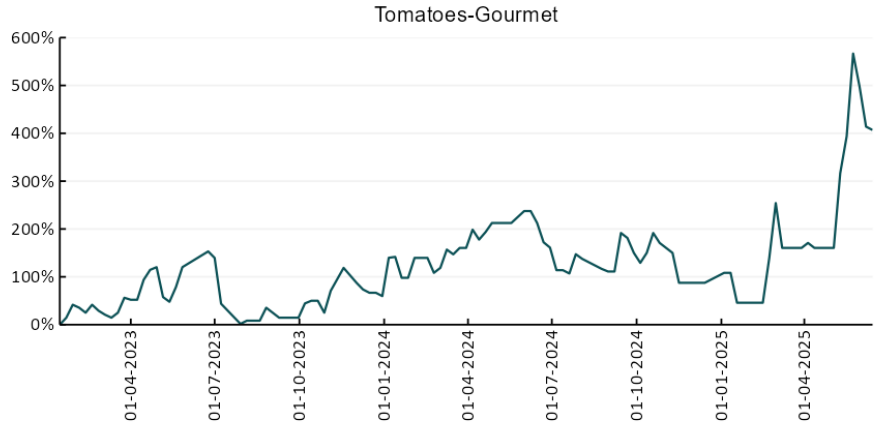


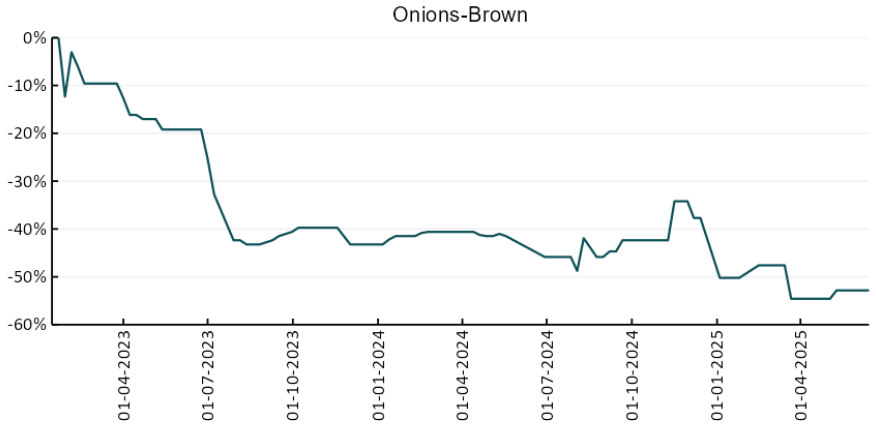




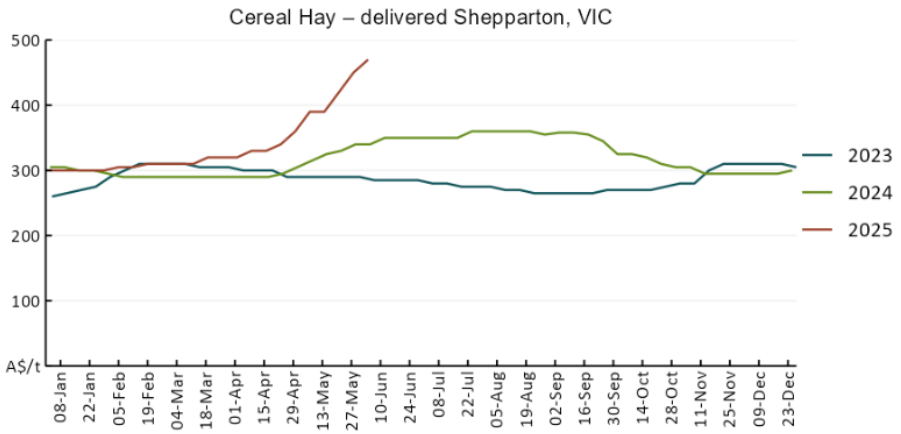

Carrots
0%
-5%
-10%
-15%
-20%
-25%
-30%
01-04-2023
01-07-2023
01-10-2023
01-01-2024
01-04-2024
01-07-2024
01-10-2024
01-01-2025
01-04-2025

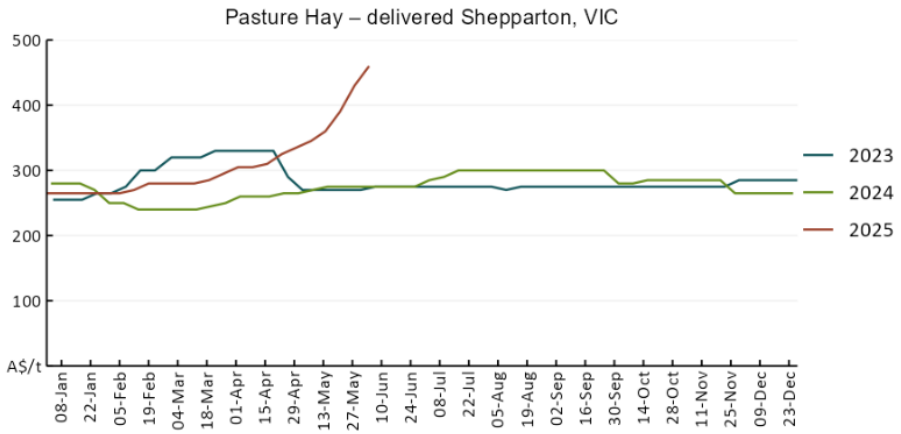

Potatoes-Dutch Cream
10%
5%
0%
-5%
-10%
-15%
-20%
-25%
01-04-2023
01-07-2023
01-10-2023
01-01-2024
01-04-2024
01-07-2024
01-10-2024
01-01-2025
01-04-2025

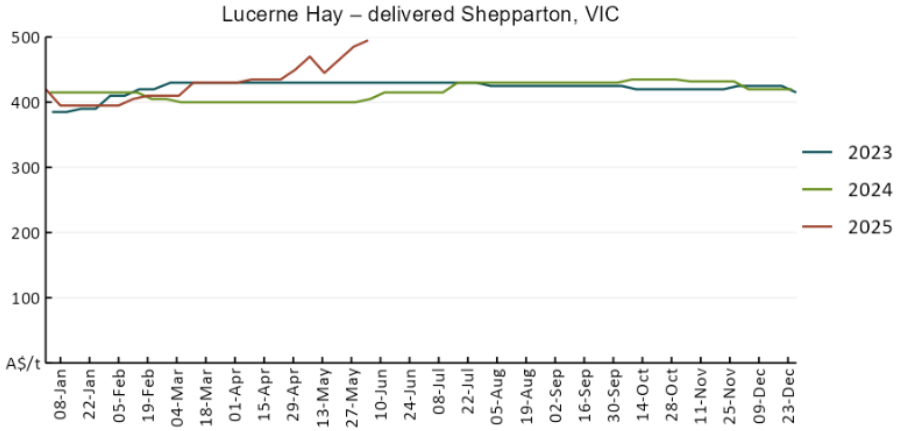

Tomatoes-Gourmet
600%
500%
400%
300%
200%
100%
0%
01-04-2023
01-07-2023
01-10-2023
01-01-2024
01-04-2024
01-07-2024
01-10-2024
01-01-2025
01-04-2025


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

Cataloguing data
This publication (and any material sourced from it) should be attributed as:

ABARES 2025, Weekly Australian Climate, Water and Agricultural Update, Australian Bureau of Agricultural and Resource Economics and Sciences, Canberra, 26 June 2025. CC BY 4.0 DOI: https://doi.org/10.25814/5f3e04e7d2503

ISSN 2652-7561

This publication is available at https://www.agriculture.gov.au/abares/products/weekly_update

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Acknowledgements
This report was prepared by Holly Beale and Matthew Miller.