## No. 34/2025 28 August 2025

# Summary of key issues

* In the week ending 27 August 2025, low-pressure systems and cold fronts brought rainfall to parts of south-eastern and south-western Australia.
  + Across cropping regions rainfall of between 5-100 millimetres was observed in Western Australia. Southern Queensland and northern New South Wales saw between 5-50 millimetres. In southern cropping regions, including South Australia, western Victoria, and southern New South Wales, 5-15 millimetres of rainfall occurred. Parts of southern Victoria saw up to 25 millimetres.
  + The low rainfall totals coupled with warming late winter temperatures across much of southern New South Wales, and parts of Victoria and eastern South Australia are likely to see further declines in soil moisture levels with potential impacts on plant growth rates and yield potentials.
* Over the coming eight days to 4 September 2025, rainfall is expected to be low across most cropping regions, with exceptions in the southeast.
  + Falls of between 5-50 millimetres are forecast across South Australia, Victoria, and parts of south-eastern New South Wales.
  + Remaining areas are expected to receive little to no rainfall.
* The national rainfall outlook for September to November 2025 indicates an increased probability of above median rainfall across much of central and eastern Australia. Most western regions are likely to see below average to average rainfall.
  + If realised, the expectation of average to above average September to November 2025 rainfall across most winter cropping regions is likely be sufficient to support the growth and development of winter crops, and the timely planting and establishment of dryland summer crops in eastern Australia.
* Water storage levels in the Murray-Darling Basin (MDB) increased by 141 gigalitres (GL) between 21 August 2025 and 28 August 2025. The current volume of water held in storages is 14,861 GL, equivalent to 67% of total storage capacity. This is 19% or 3,529GL less than the same time last year. Water storage data is sourced from the Bureau of Meteorology (BOM).
* Allocation prices in the Victorian Murray below the Barmah Choke decreased from $272/ML on 21 August 2025 to $262/ML on 28 August 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.

## **Climate**

### Rainfall this week

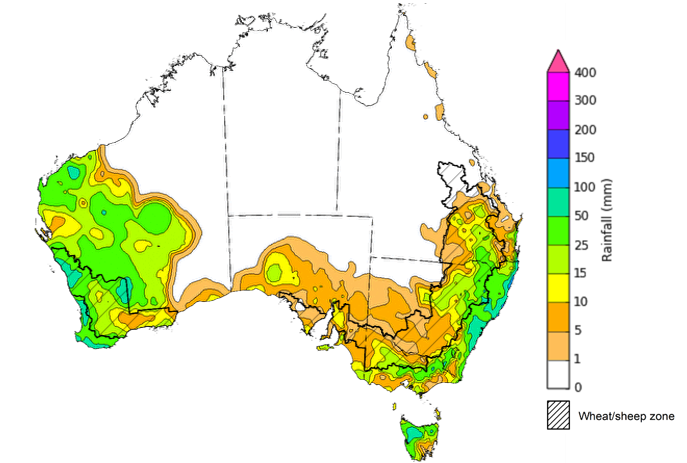
In the week ending 27 August 2025, **cold fronts and low-pressure systems** brought rainfall to parts of south-eastern and south-western Australia, while much of the remainder of Australia stayed largely dry.

* Rainfall totals of between 5-100 millimetres were recorded across south-western Western Australia, Tasmania and eastern parts of New South Wales. In Victoria and southeast Queensland, 5-50 millimetres of rainfall was observed.
* Falls of between 5-25 millimetres were recorded across parts of southern South Australia, as well as parts of south-western New South Wales.

Rainfall was highly variable across winter cropping regions in the week ending 27 August 2025.

* Rainfall of between 5-100 millimetres was observed in Western Australia. Southern Queenland and northern New South Wales saw between 5-50 millimetres.
* In southern regions, including South Australia, western Victoria, and southern New South Wales, 5-15 millimetres of rainfall occurred. Parts of southern Victoria saw up to 25 millimetres.
  + Low rainfall totals coupled with warming late winter temperatures across much of southern New South Wales, and parts Victoria and South Australia is likely to see further declines in soil moisture levels with potential impacts on plant growth rates and yield potentials.

#### Rainfall for the week ending 27 August 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](http://www.bom.gov.au/climate/headers/qc.shtml). 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/>

### Rainfall forecast for the next eight days

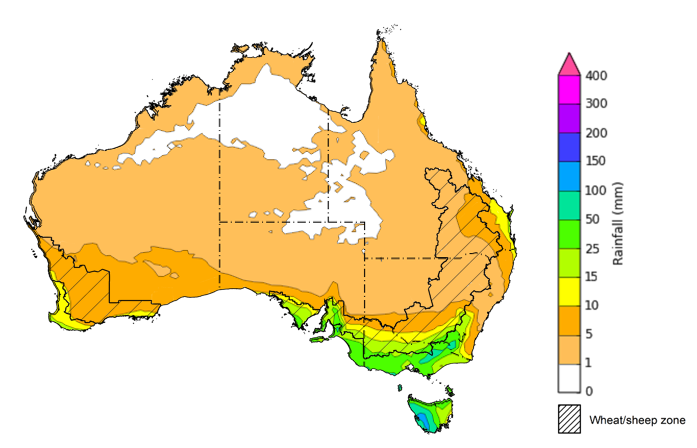
Over the 8 days to 4 September 2025, **cold fronts** are expected to bring rainfall to parts of the southeast, remaining southern, central, and northern regions of Australia are forecast to remain dry.

* Rainfall totals of between 10-50 millimetres are expected across much of Victoria, southern areas of South Australia and parts of south-eastern New South Wales. Lighter falls of between 5-15 millimetres are expected across southern Western Australia and parts of south-eastern Queensland.
* Higher falls are expected in Tasmania, with 25-150 millimetres of rainfall forecast.
* In contrast, remaining areas are forecast to remain largely dry.

Rainfall is likely to be low across most cropping regions this week, with exceptions in the southeast.

* Falls of between 5-25 millimetres are forecast across South Australia, Victoria, and parts of southern New South Wales. Lighter falls of between 5-10 millimetres are expected in Western Australia and eastern Queensland.
  + If realised these falls are likely to be sufficient to support the crop and pasture growth and development in most areas and see some ongoing improvement to a soil moisture reserves in southern Victoria and western and central regions of South Australia.
* Remaining areas are expected to receive little to no rainfall.

#### Total forecast rainfall for the period 28 August to 4 September 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.

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### National Climate Outlook

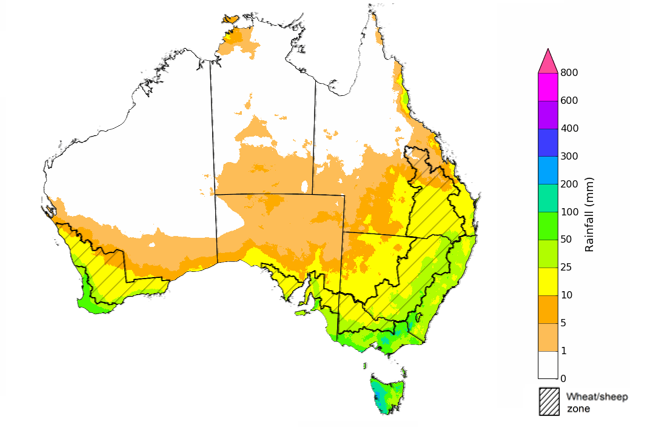
The El Niño Southern Oscillation (ENSO) and Indian Ocean Dipole (IOD) climate drivers are currently neutral and having minimal influence on Australian rainfall. The ENSO is likely to remain neutral until January. In contrast, the Southern Annular Mode (SAM) is currently positive, but is likely to return to neutral over the coming fortnight. A positive SAM has contributed to reduced cold front rainfall across parts of south-eastern Australia over recent weeks relative to a neutral SAM expectation.

Meanwhile, the development of a negative IOD event is becoming increasingly likely. During the last 5 weeks the IOD index has been below the negative IOD threshold. The latest IOD index value for the week ending 24 August is −1.20 °C. Sustained index values less than or equal to −0.4 °C for at least 8 weeks are typical of a negative IOD event. All international models, including the Bureau of Meteorology's model, predict a negative phase of the IOD during spring, with a return to neutral in early summer, consistent with the typical IOD life cycle. A negative IOD typically results in above-average spring rainfall over parts of southern Australia.

The most recent **rainfall outlook for September 2025** provided by the Bureau of Meteorology indicates that much of **northern and eastern Australia** is likely to see **above median rainfall,** with parts of **south-western** **Australia** likely to see **below average** falls**.**

* The Bureau of Meteorology’s climate model indicates a 75% chance of September rainfall totals between 5-100 millimetres across much of southern Australia. Despite the increased probabilities of above average rainfall across much of northern Australia, September is a transition month between the northern Australian dry and wet seasons. During this time of year, most of the northern two-thirds of Australia typically receives very low rainfall, with average rainfall less than 5 millimetres for the month of September.
* 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 growth and development of winter crops. In contrast, most Queensland cropping regions are likely to see 5-25 millimetres. These lower expected rainfall totals are unlikely to adversely impact crop growth as crops will be able to utilise soil moisture reserves to support their growth and development.

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

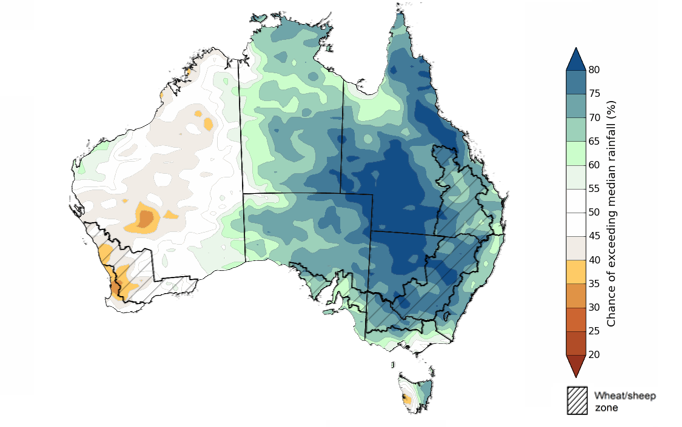


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The **rainfall outlook for September to November 2025** indicates an increased probability of **above median rainfall across much of central and eastern Australia,** including much of Queensland, New South Wales, Victoria, South Australia, and the Northern Territory. In contrast, large areas of Western Australia are showing a slightly increased probability of **below median rainfall**. Much of western Tasmania and remainder of Western Australia have an equal probability of above or below average rainfall.

Across cropping regions, the chance of receiving above median rainfall is above 75% across Queensland and New South Wales, while South Australia and Victoria have a greater than 60% probability of receiving above median rainfall over the period. In Western Australia, the probability of above median rainfall is lower at 35-55%.

**Chance of exceeding the median rainfall September 2025 to November 2025**

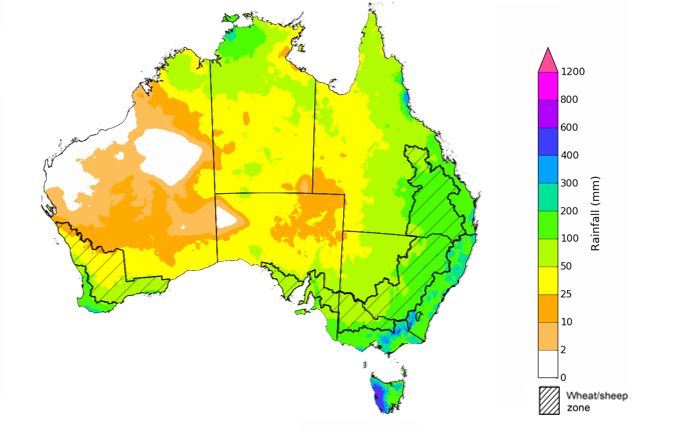
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The **rainfall outlook for September through to November 2025** suggests a 75% chance of receiving rainfall totals of between 50-300 millimetres across much of New South Wales and Victoria. Between 300-600 millimetres are expected across western Tasmania and alpine areas of New South Wales and Victoria. Lower rainfall totals are forecast for northern, central and western regions, with South Australia, Queensland, the Northern Territory, and the southwest and north of Western Australia likely to see 25-200 millimetres of rainfall. Across much of central Western Australia, little to no rainfall is forecast over the period.

In **cropping regions**, there is a **75% chance** of receiving between **100-200 millimetres** across **Queensland, New South Wales, Victoria** and **South Australia**. In **Western Australia**, falls of **25- 100 millimetres** are expected. If realised, these falls are likely be sufficient to support the growth and development of winter crops, and the timely planting and establishment of dryland summer crops in eastern Australia.

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



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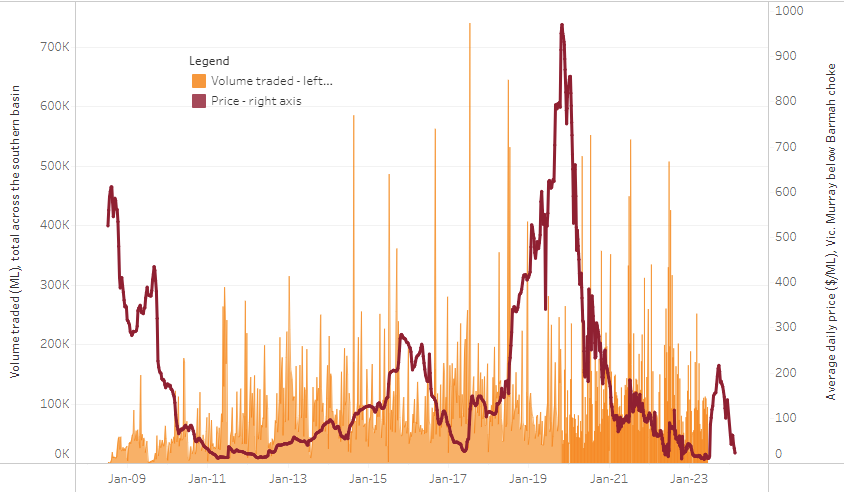
### Water markets – current week

#### Water storage levels in the Murray-Darling Basin (MDB) increased by 141 gigalitres (GL) between 21 August 2025 and 28 August 2025. The current volume of water held in storages is 14,861 GL, equivalent to 67% of total storage capacity. This is 19% or 3,529GL less than the same time last year. Water storage data is sourced from the Bureau of Meteorology (BOM).

#### Water storages in the Murray-Darling Basin, 2013–2025Alt Text: A chart showing water storage in the Murray-Darling Basin. For more information, refer to accompanying text

Allocation prices in the Victorian Murray below the Barmah Choke decreased from $272/ML on 21 August 2025 to $262/ML on 28 August 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 isopen.

#### Surface water trade activity, Southern Murray–Darling Basin



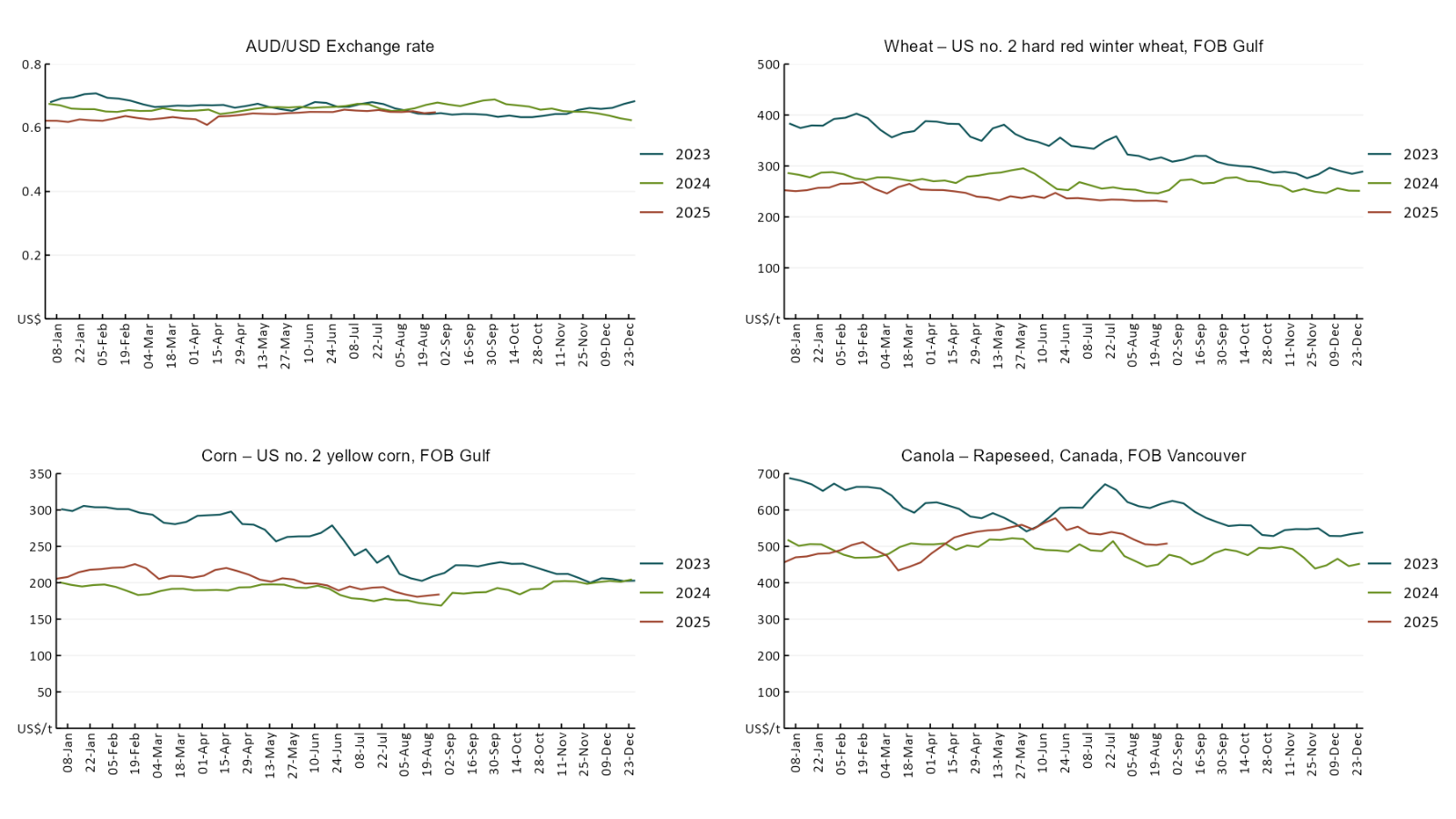
|  |
| --- |
| The trades shown reflect estimated market activity and do not encompass all register trades. The price is shown for the VIC Murray below the Barmah choke. Historical prices (before 1 July 2019) are ABARES estimates after removing outliers from BOM water register data. Prices after 1 July 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-140825

## **Commodities**

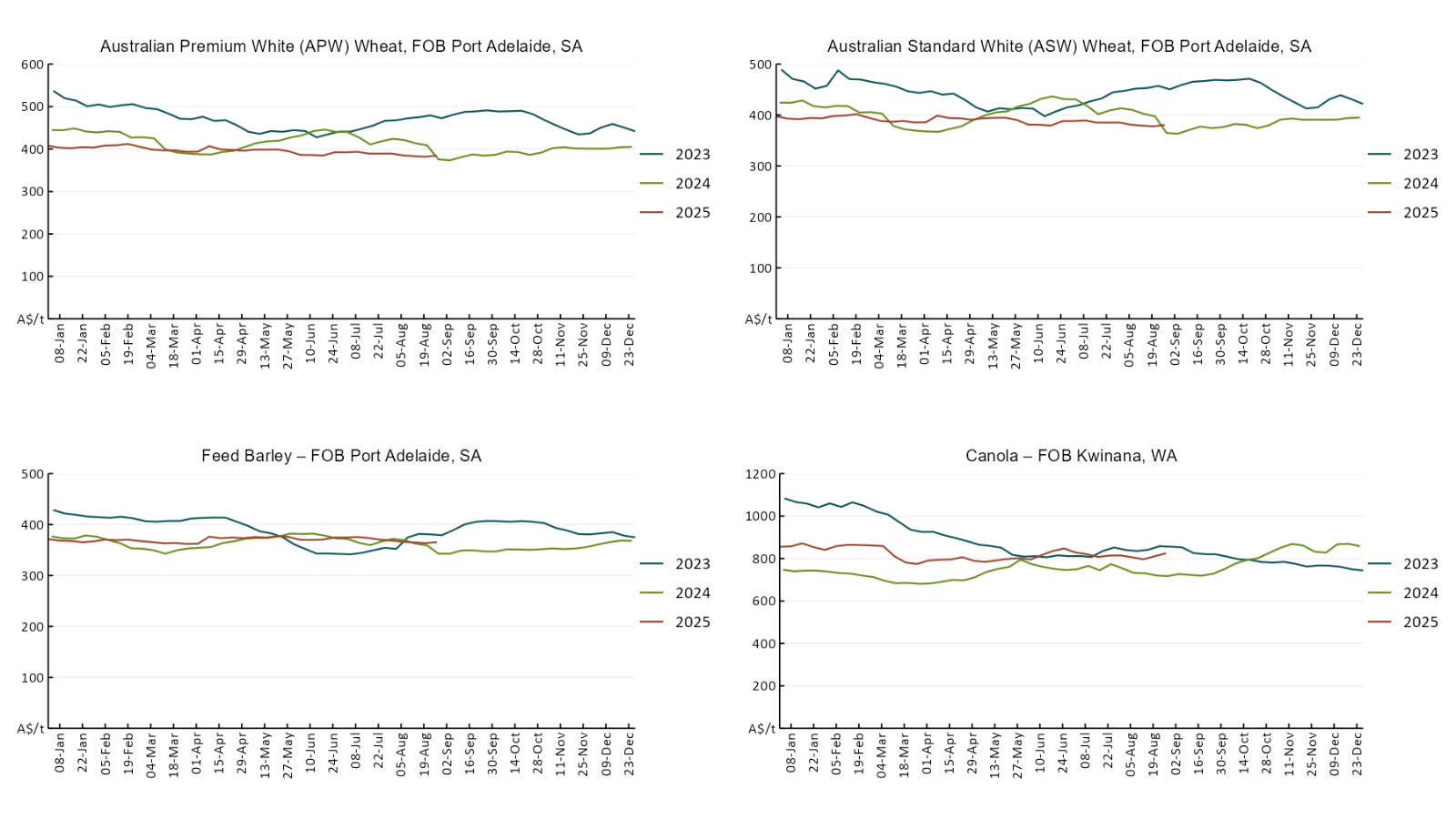
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| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Indicator** | **Week average** | **Unit** | **Latest Price** | **Previous Week** | **Weekly change** | | **Price 12 months ago** | **Annual change** |
| **Selected world indicator prices** |  |  |  |  |  |  | |  |
| AUD/USD Exchange rate | 27-Aug | A$/US$ | 0.65 | 0.65 | 0% | 0.67 | | -3% |
| Wheat – US no. 2 hard red winter wheat, FOB Gulf | 27-Aug | US$/t | 230 | 232 | -1% | 250 | | -8% |
| Corn – US no. 2 yellow corn, FOB Gulf | 27-Aug | US$/t | 184 | 182 | 1% | 172 | | 7% |
| Canola – Rapeseed, Canada, FOB Vancouver | 27-Aug | US$/t | 508 | 504 | 1% | 458 | | 11% |
| Cotton – Cotlook A Index | 27-Aug | USc/lb | 78.6 | 79.0 | -1% | 80 | | -2% |
| Sugar – Intercontinental Exchange, nearby futures, no.11 contract | 27-Aug | USc/lb | 16.4 | 16.4 | 0% | 19 | | -12% |
| Wool – Eastern Market Indicator | 27-Aug | Ac/kg clean | 1,261 | 1,247 | 1% | 1,100 | | 15% |
| Wool – Western Market Indicator | 27-Aug | Ac/kg clean | 1,402 | 1,396 | 0% | 1,236 | | 13% |
| **Selected Australian grain export prices** |  |  |  |  |  |  | |  |
| Australian Premium White (APW) Wheat, FOB Port Adelaide, SA | 27-Aug | A$/t | 385 | 382 | 1% | 405 | | -5% |
| Australian Standard White (ASW) Wheat, FOB Port Adelaide, SA | 27-Aug | A$/t | 381 | 378 | 1% | 394 | | -3% |
| Feed Barley – FOB Port Adelaide, SA | 27-Aug | A$/t | 366 | 364 | 1% | 358 | | 2% |
| Canola – FOB Kwinana, WA | 27-Aug | A$/t | 825 | 811 | 2% | 725 | | 14% |
| Grain Sorghum – FOB Brisbane, QLD | 27-Aug | A$/t | 415 | 415 | 0% | 408 | | 2% |
| **Selected domestic livestock indicator prices** |  |  |  |  |  |  | |  |
| Beef – Eastern Young Cattle Indicator | 27-Aug | Ac/kg cwt | 881 | 864 | 2% | 671 | | 31% |
| Mutton – Mutton indicator (18–24 kg fat score 2–3), VIC | 27-Aug | Ac/kg cwt | 711 | 729 | -3% | 370 | | 92% |
| Lamb – National Trade Lamb Indicator | 27-Aug | Ac/kg cwt | 1,127 | 1,147 | -2% | 809 | | 39% |
| Pig – Eastern Seaboard (60.1–75 kg), NSW buyer price | 13-Aug | Ac/kg cwt | 461 | 453 | 2% | 415 | | 11% |
| Live cattle – Light steers to Indonesia | 27-Aug | Ac/kg lwt | 350 | 350 | 0% | 300 | | 17% |
| **Global Dairy Trade (GDT) weighted average prices** |  |  |  |  |  |  | |  |
| Dairy – Whole milk powder | 20-Aug | US$/t | 4,036 | 4,012 | 1% | 3,371 | | 20% |
| Dairy – Skim milk powder | 20-Aug | US$/t | 2,756 | 2,805 | -2% | 2,588 | | 7% |
| Dairy – Cheddar cheese | 20-Aug | US$/t | 4,548 | 4,575 | -1% | 4,275 | | 6% |
| Dairy – Anhydrous milk fat | 20-Aug | US$/t | 7,078 | 7,081 | 0% | 7,078 | | 0% |
|  | | | | | | | | |

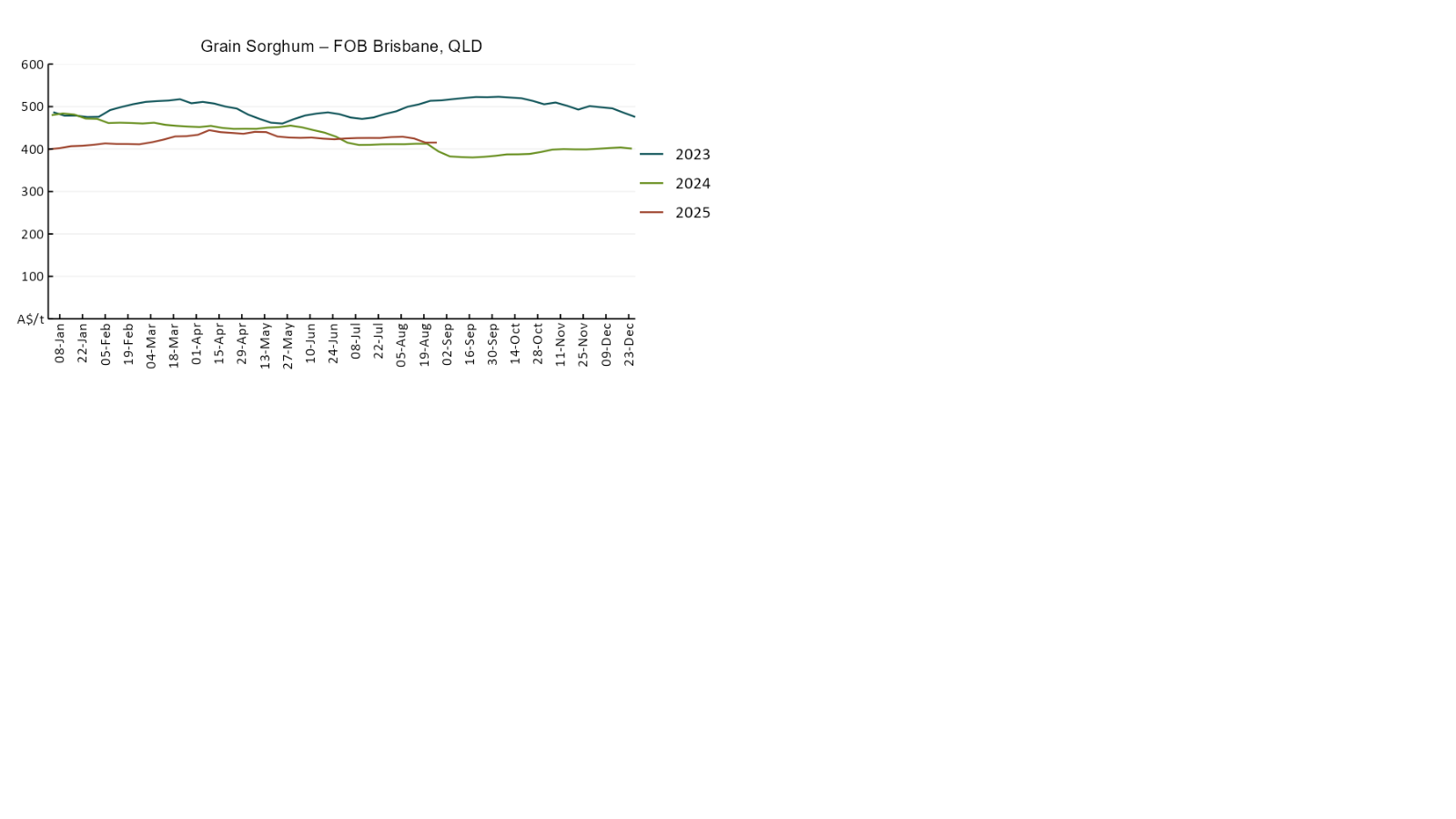
### Selected world indicator prices



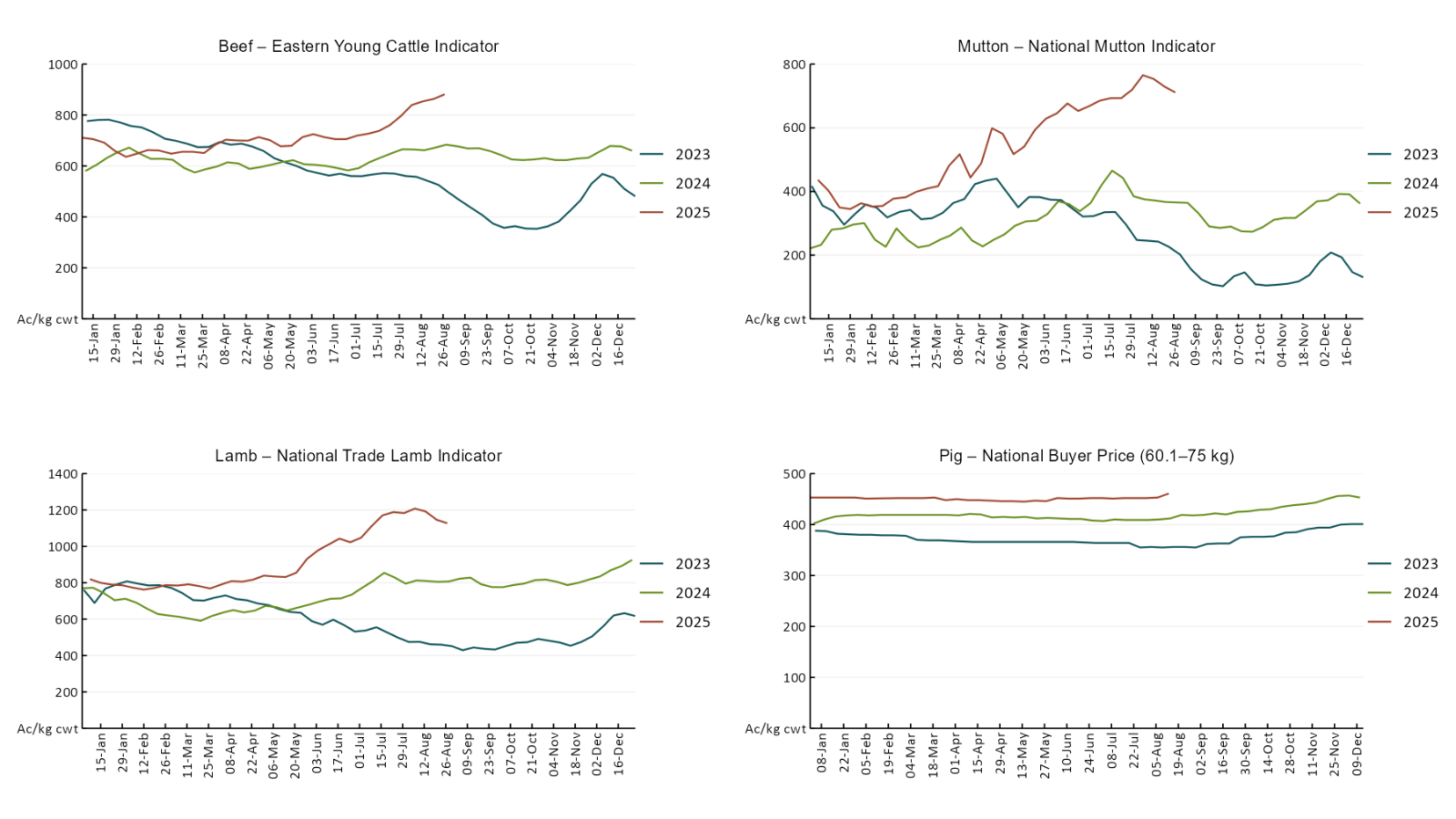
### A line chart of major world indicator prices. For more information, refer to https://www.agriculture.gov.au/abares/data/weekly-commodity-price-update/world-agricultural-prices

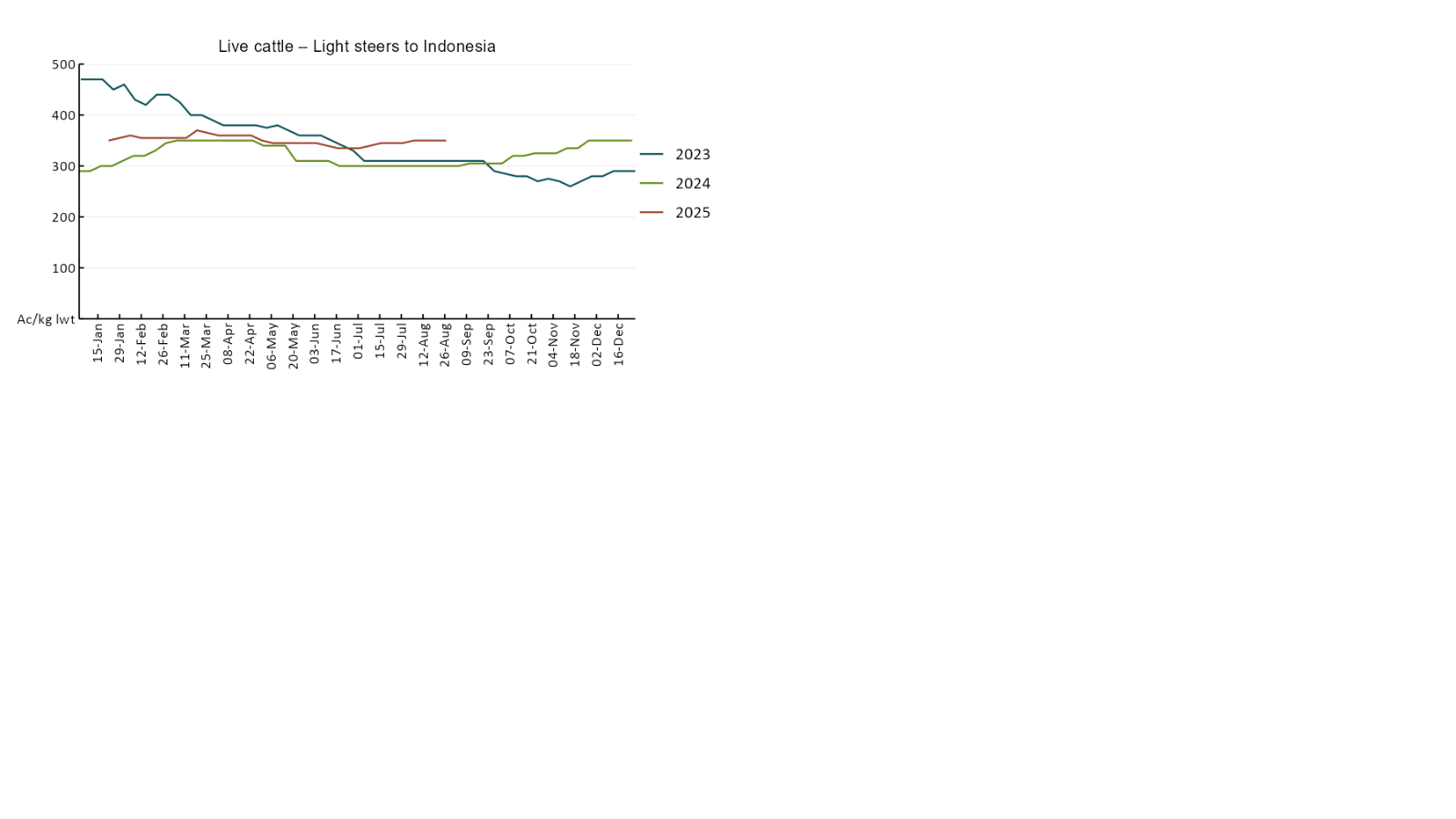
### 3.2 Selected domestic crop indicator prices





### 3.3 Selected domestic livestock indicator prices





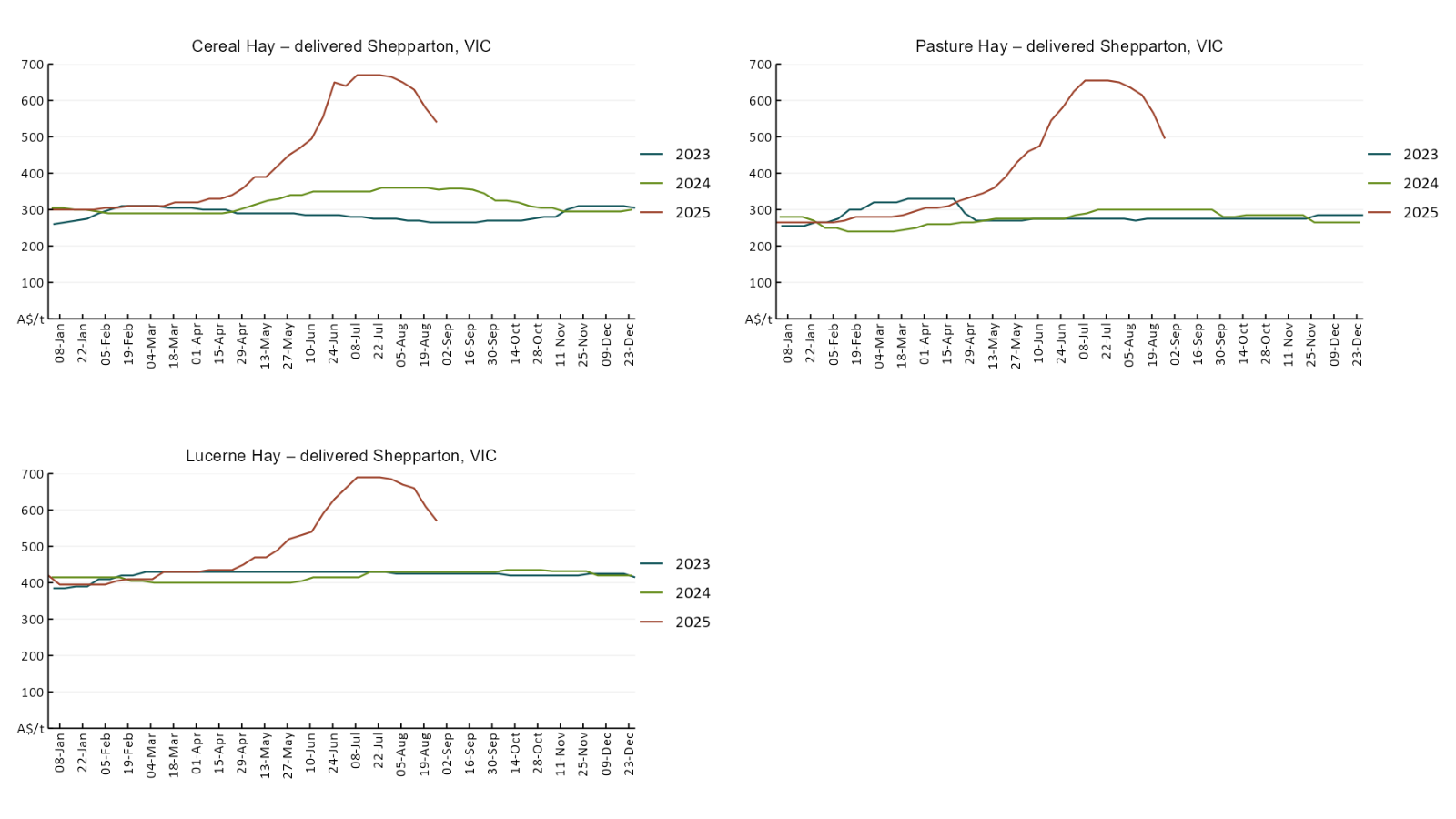
### 3.4 Global Dairy Trade (GDT) weighted average pricesA line chart of Global Dairy Trade prices. For more information, refer to https://www.agriculture.gov.au/abares/data/weekly-commodity-price-update/world-agricultural-prices

### 3.5 Selected fruit and vegetable prices

### A line chart of fruit and vegetable prices. For more information, refer to https://www.agriculture.gov.au/abares/data/weekly-commodity-price-update/world-agricultural-prices

### A line chart of fruit and vegetable prices. For more information, refer to https://www.agriculture.gov.au/abares/data/weekly-commodity-price-update/world-agricultural-prices

### 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/](http://www.bom.gov.au/water/landscape/)
* Temperature anomalies: [www.bom.gov.au/jsp/awap/temp/index.jsp](http://www.bom.gov.au/jsp/awap/temp/index.jsp)
* Rainfall forecast: [www.bom.gov.au/jsp/watl/rainfall/pme.jsp](http://www.bom.gov.au/jsp/watl/rainfall/pme.jsp)
* Seasonal outlook: [www.bom.gov.au/climate/outlooks/#/overview/summary/](http://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/](http://www.bom.gov.au/water/landscape/)
* Other
* Pasture growth: [www.longpaddock.qld.gov.au/aussiegrass/](http://www.longpaddock.qld.gov.au/aussiegrass/)
* 3-month global outlooks: [Environment and Climate Change Canada](https://weather.gc.ca/saisons/image_e.html?img=s234pfe1p_cal&bc=prob), [NOAA Climate Prediction Center](https://www.cpc.ncep.noaa.gov/products/predictions/long_range/seasonal.php?lead=2), [EUROBRISA CPTEC/INPE](http://eurobrisa.cptec.inpe.br/), European Centre for Medium-Range Weather Forecasts, [Hydrometcenter of Russia](https://meteoinfo.ru/en/climate/seasonal-forecasts), [National Climate Center Climate System Diagnosis and Prediction Room (NCC)](https://cmdp.ncc-cma.net/pred/cs2gen.php?pred_elem=RAINP#pred_seasonal), [International Research Institute for Climate and Society](https://iri.columbia.edu/our-expertise/climate/forecasts/seasonal-climate-forecasts/)
* 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](http://www.freshstate.com.au)
* Pigs
* Australian Pork Limited: [www.australianpork.com.au](http://www.australianpork.com.au)
* Dairy
* Global Dairy Trade: [www.globaldairytrade.info/en/product-results/](http://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/](http://www.cotlook.com/)
* World sugar
* New York Stock Exchange - Intercontinental Exchange
* Wool
* Australian Wool Exchange: [www.awex.com.au/](http://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](http://www.mla.com.au/Prices-and-market)

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Department of Agriculture, Fisheries and Forestry

GPO Box 858 Canberra ACT 2601

Telephone 1800 900 090

Web [agriculture.gov.au/abares](http://awe.gov.au/abares)

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