Australian Government
Department of Agriculture, Fisheries and Forestry

ABARES

Weekly Australian Climate, Water and Agricultural Update

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.

1. Climate

1.1. Rainfall this week

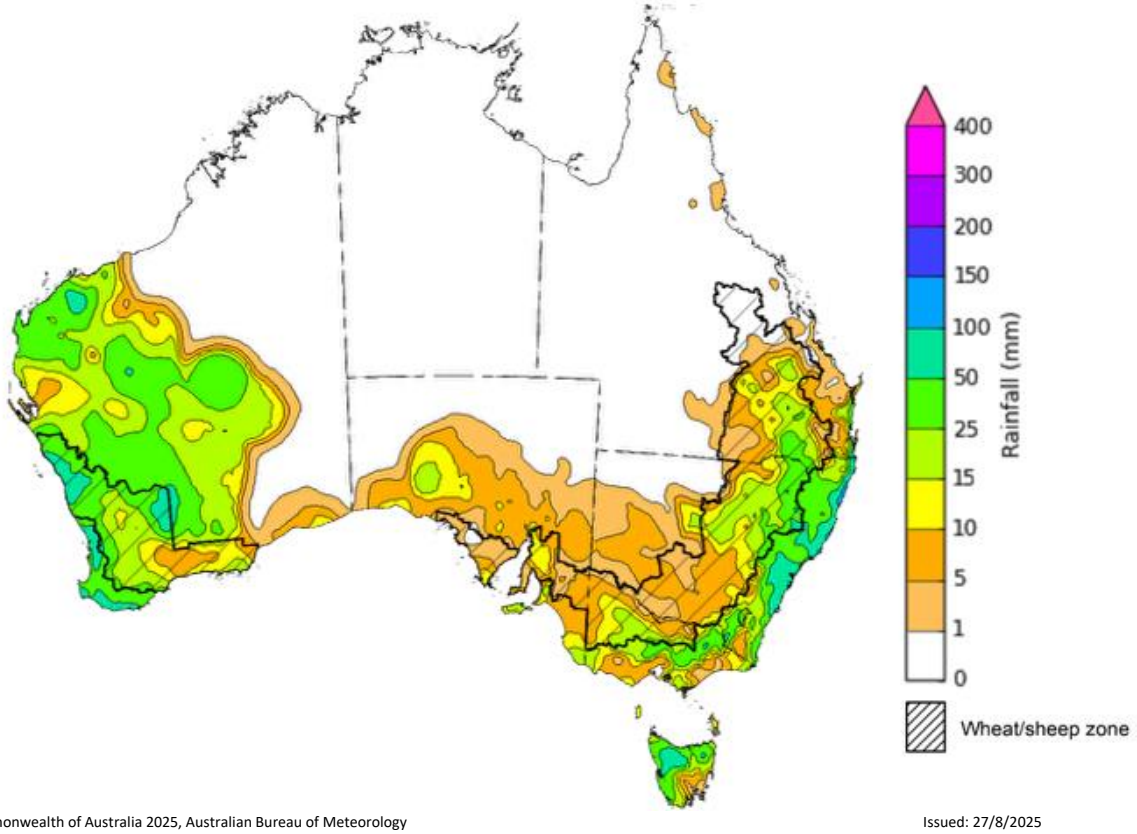
In the week ending 27 August 2025, **cold fronts and low-pressure systems** brought rainfall to parts of south-eastern and south-western Australia, while much of the remainder of Australia stayed largely dry.

- 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



 Issued: 27/8/2025
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

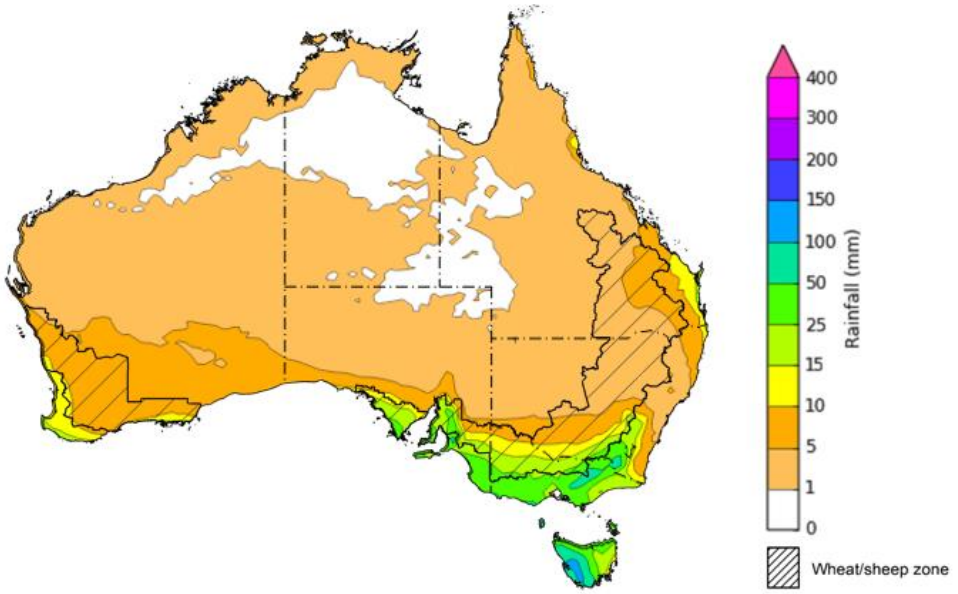
Over the 8 days to 4 September 2025, **cold fronts** are expected to bring rainfall to parts of the southeast, remaining southern, central, and northern regions of Australia are forecast to remain dry.

- 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



 Issued 28/8/2025
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. National Climate Outlook

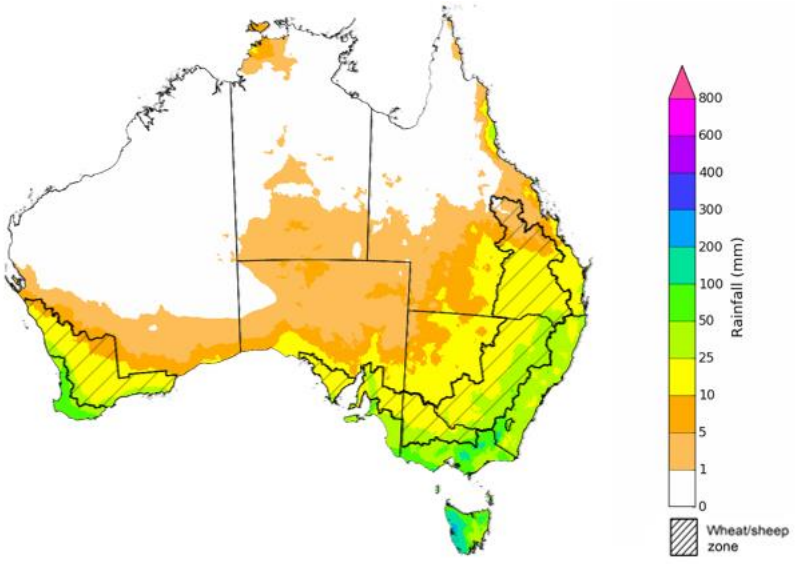
The El Niño Southern Oscillation (ENSO) and Indian Ocean Dipole (IOD) climate drivers are currently neutral and having minimal influence on Australian rainfall. The ENSO is likely to remain neutral until January. In contrast, the Southern Annular Mode (SAM) is currently positive, but is likely to return 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

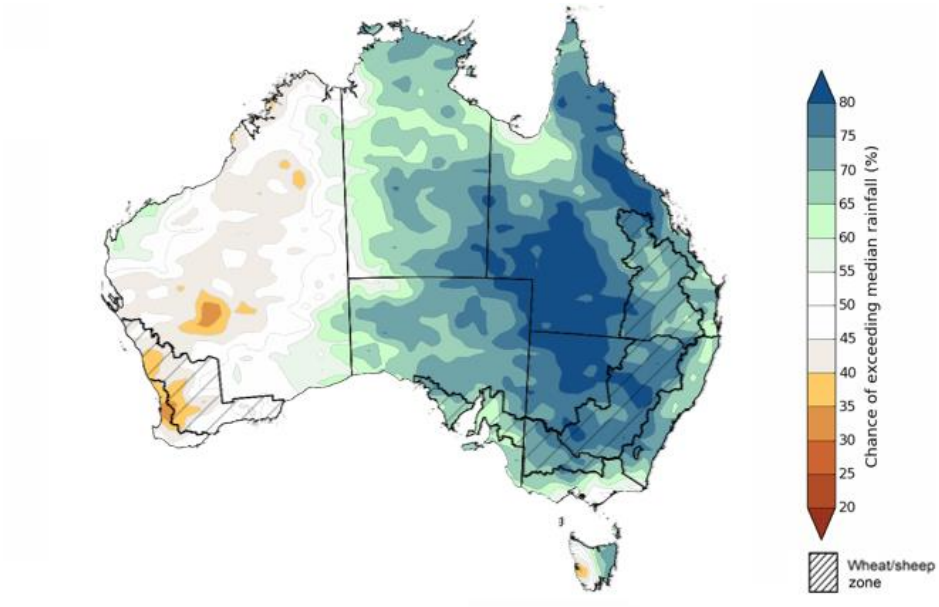


Issued: 28/8/2025

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

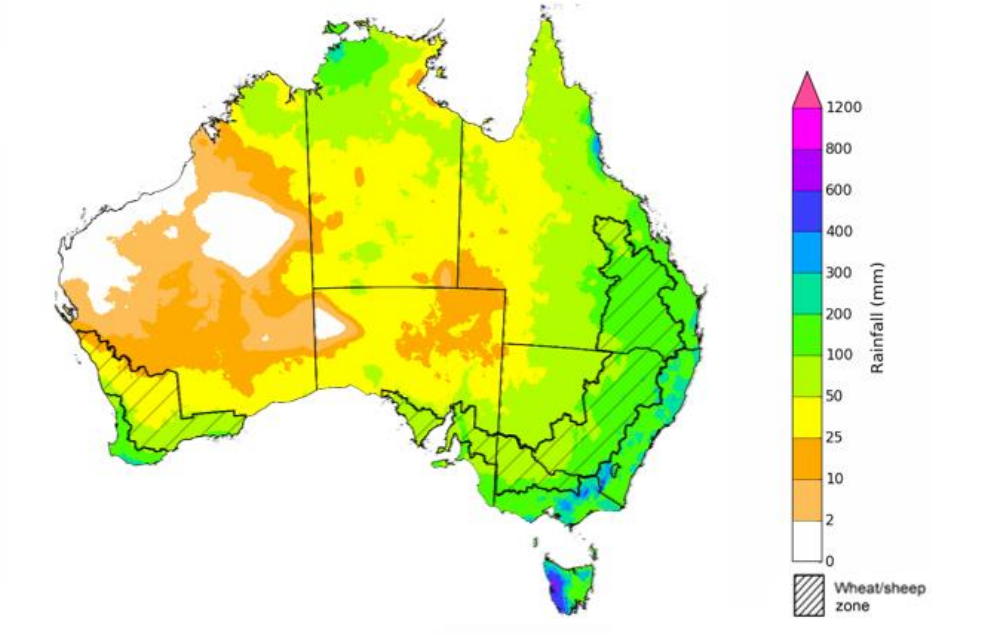


Issued: 28/8/2025

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

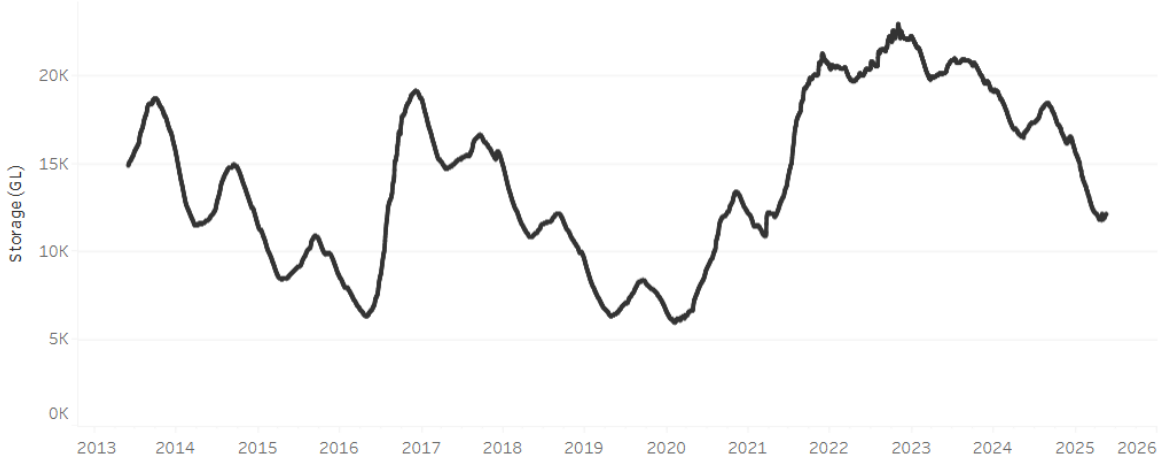


Issued: 28/8/2025

1.4. Water markets – current week

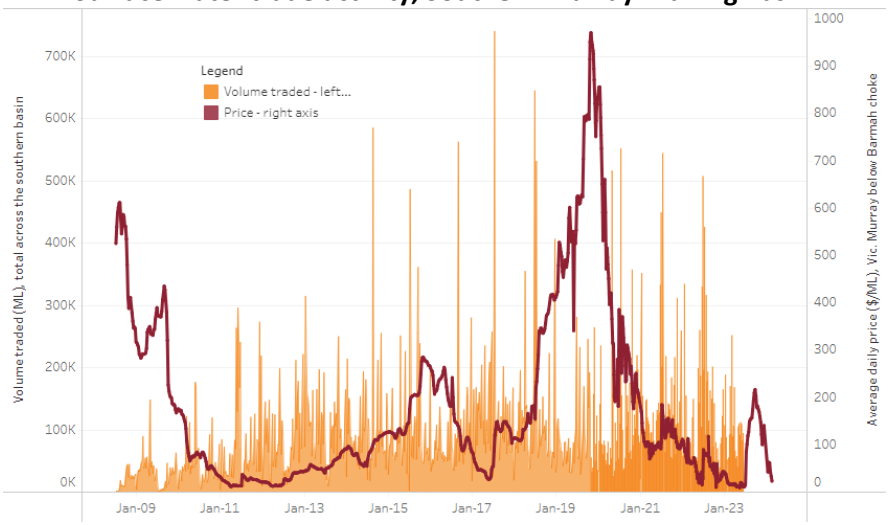
Water storage levels in the Murray-Darling Basin (MDB) increased by 141 gigalitres (GL) between 21 August 2025 and 28 August 2025. The current volume of water held in storages is 14,861 GL, equivalent to 67% of total storage capacity. This is 19% or 3,529GL less than the same time last year. Water storage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

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



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



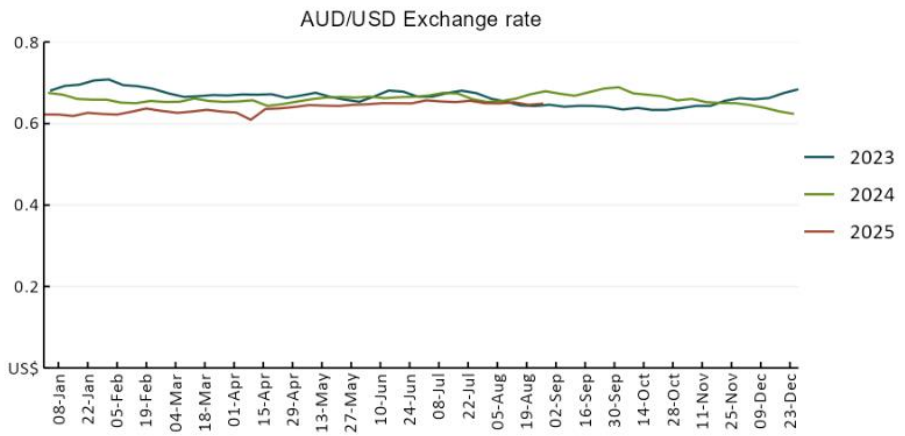
The trades shown reflect estimated market activity and do not encompass all register trades. The price is shown for the VIC Murray below the Barmah choke. Historical prices (before 1 July 2019) are ABARES estimates after removing outliers from BOM water register data. Prices after 1 July 2019 and prior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

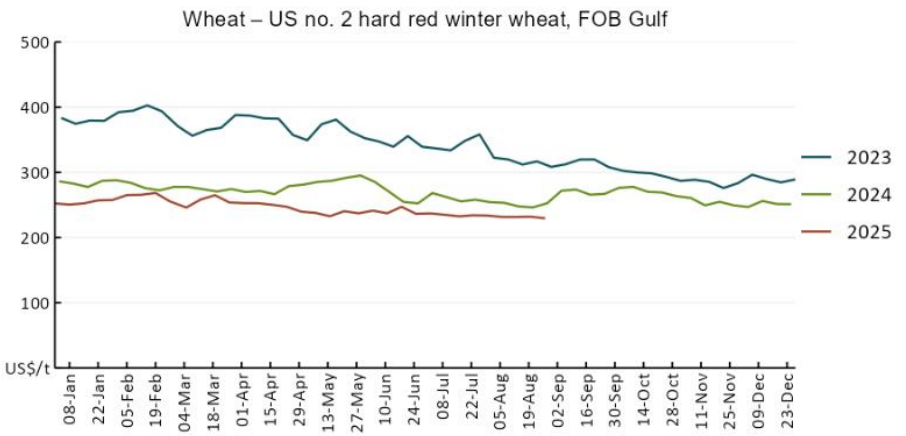
To access the full, interactive, weekly water dashboard, which contains the latest and historical water storage, water market and water allocation information, please visit

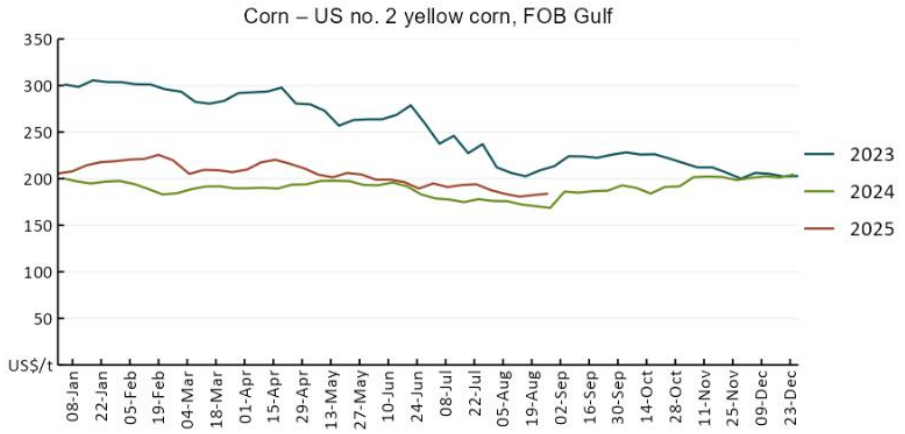
2. Commodities

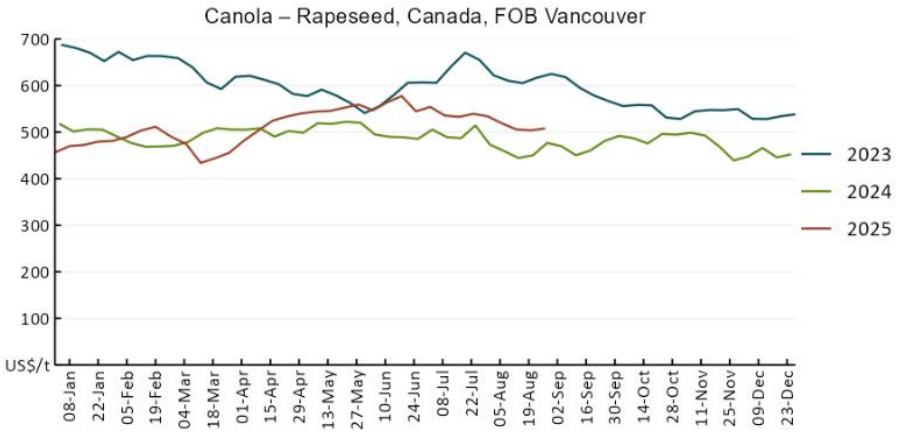
Indicator	Week average	Unit	Latest Price	Previous Week	Weekly change	Price 12 months ago	Annual change
Selected world indicator prices							
AUD/USD Exchange rate	27-Aug	A$/US$	0.65	0.65	0%	0.67	-3%
Wheat – US no. 2 hard red winter wheat, FOB Gulf	27-Aug	US$/t	230	232	-1%	250	-8%
Corn – US no. 2 yellow corn, FOB Gulf	27-Aug	US$/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%

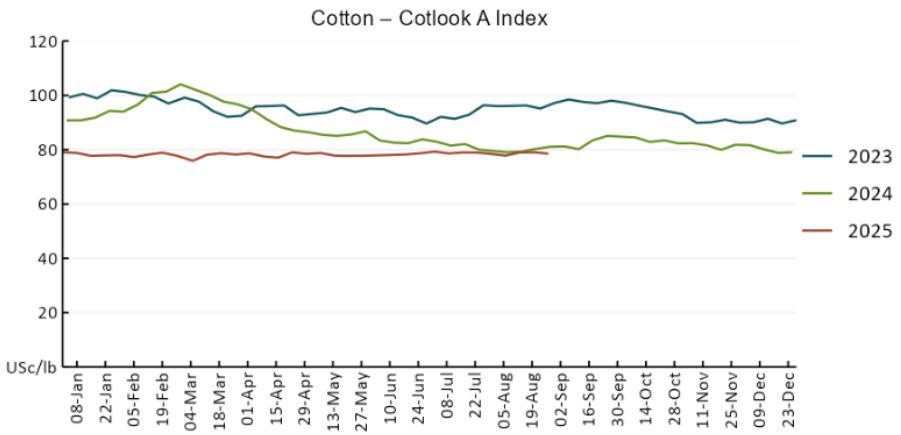
2.1. Selected world indicator prices

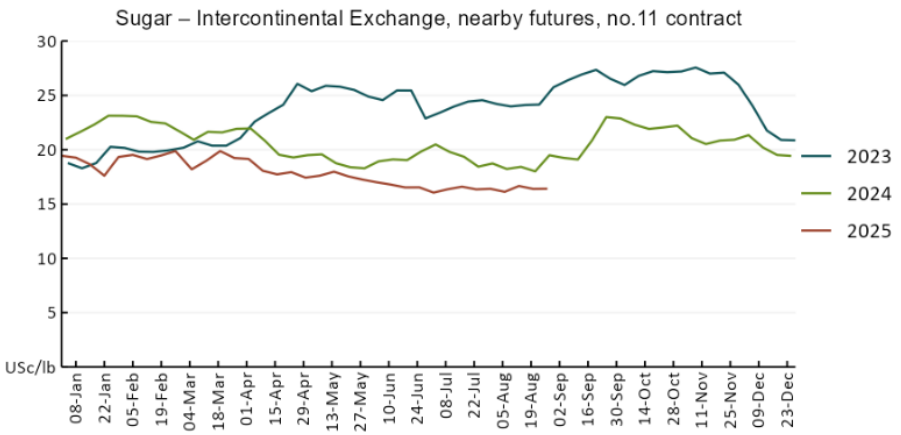









Cotton – Cotlook A Index
120
100
80
60
40
20
USc/lb
08-Jan
22-Jan
05-Feb
19-Feb
04-Mar
18-Mar
01-Apr
15-Apr
29-Apr
13-May
27-May
10-Jun
24-Jun
08-Jul
22-Jul
05-Aug
19-Aug
02-Sep
16-Sep
30-Sep
14-Oct
28-Oct
11-Nov
25-Nov
09-Dec
23-Dec
2023
2024
2025


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
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08-Jul
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05-Aug
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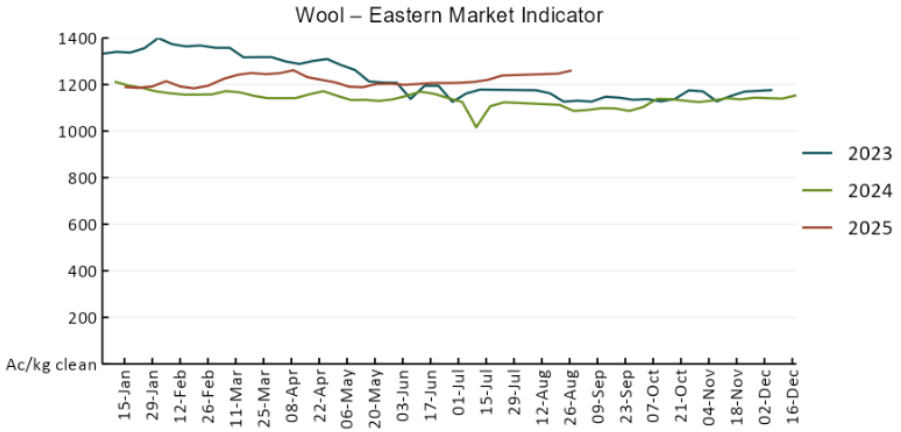
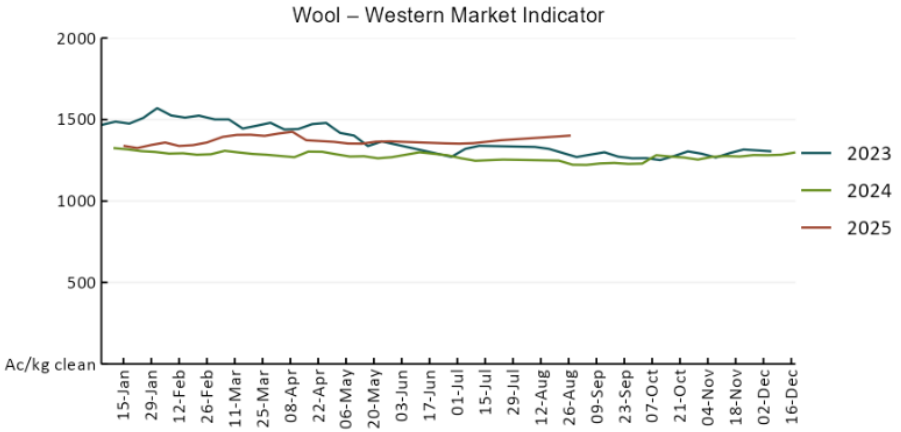
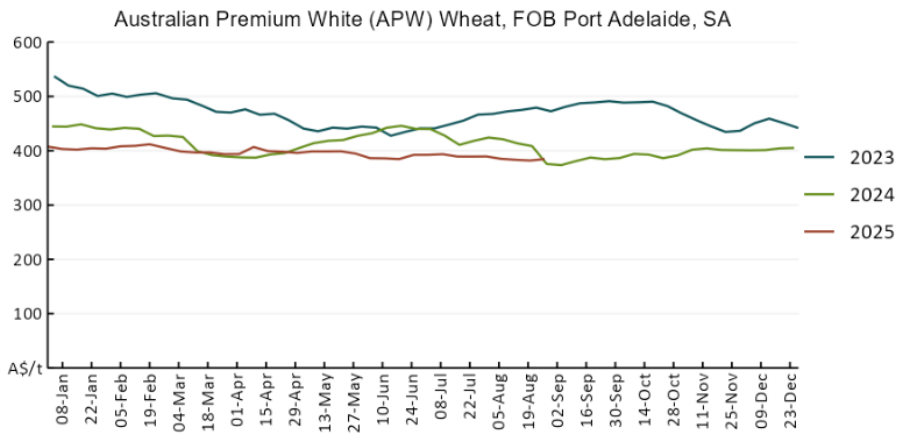
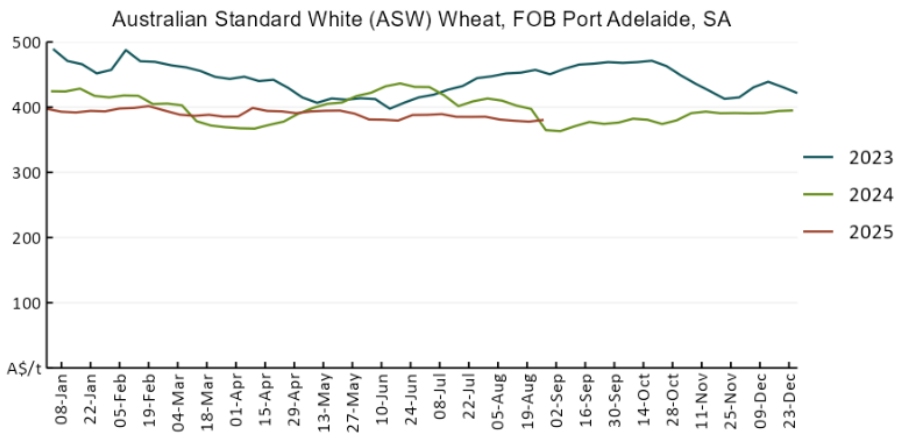
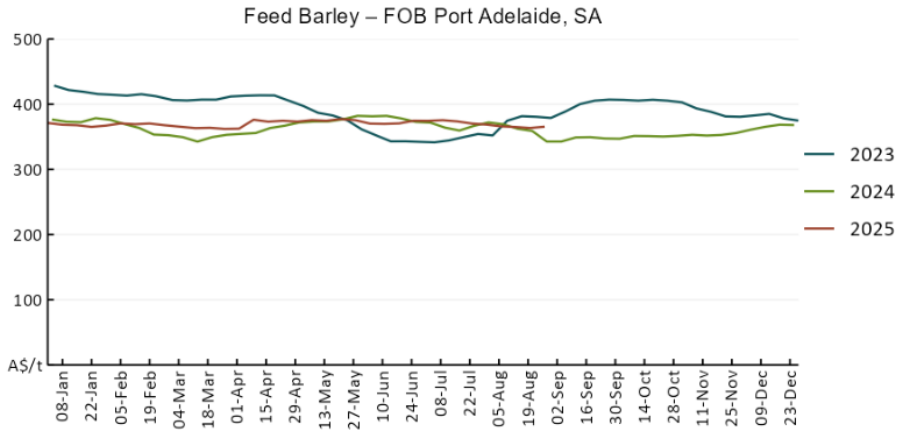

Wool – Eastern Market Indicator
1400
1200
1000
800
600
400
200
Ac/kg clean
15-Jan
29-Jan
12-Feb
26-Feb
11-Mar
25-Mar
08-Apr
22-Apr
06-May
20-May
03-Jun
17-Jun
01-Jul
15-Jul
29-Jul
12-Aug
26-Aug
09-Sep
23-Sep
07-Oct
21-Oct
04-Nov
18-Nov
02-Dec
16-Dec
2023
2024
2025

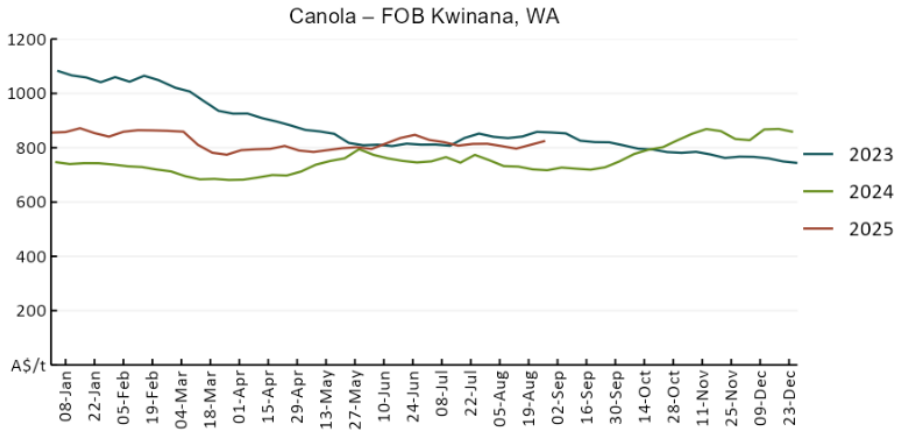

Wool – Western Market Indicator
2000
1500
1000
500
Ac/kg clean
15-Jan
29-Jan
12-Feb
26-Feb
11-Mar
25-Mar
08-Apr
22-Apr
06-May
20-May
03-Jun
17-Jun
01-Jul
15-Jul
29-Jul
12-Aug
26-Aug
09-Sep
23-Sep
07-Oct
21-Oct
04-Nov
18-Nov
02-Dec
16-Dec
2023
2024
2025

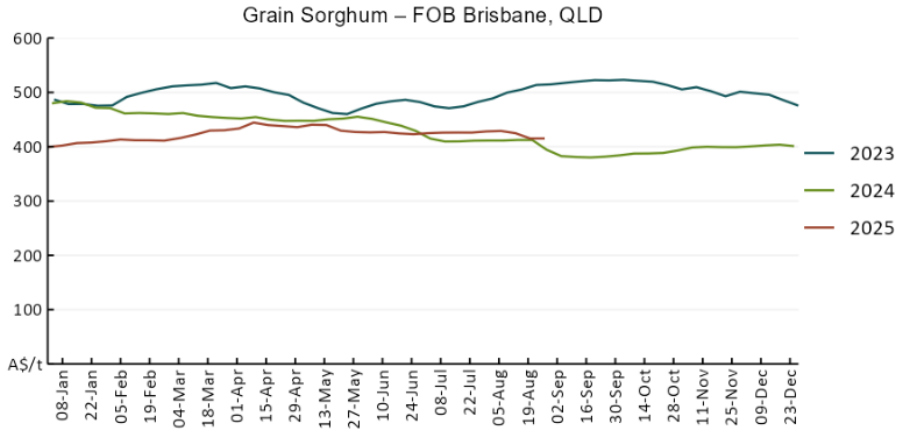
3.2 Selected domestic crop indicator prices



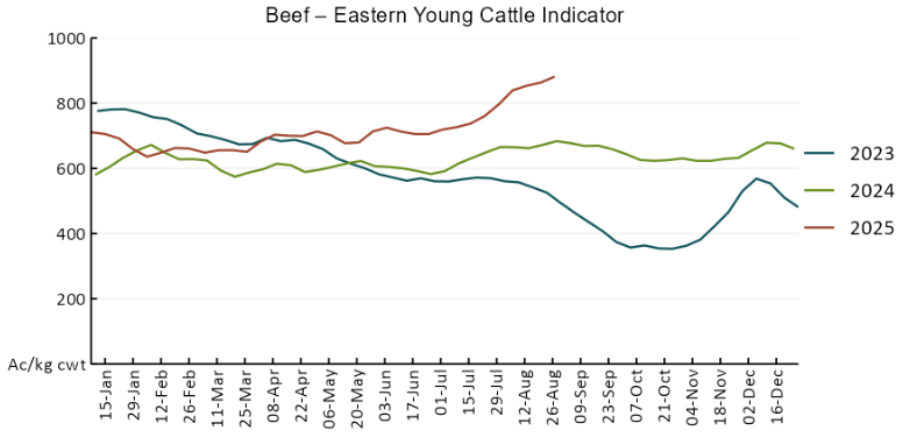


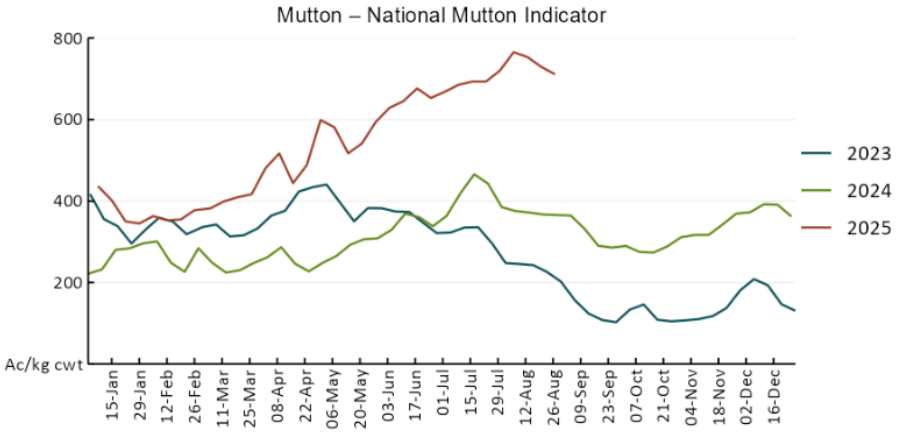


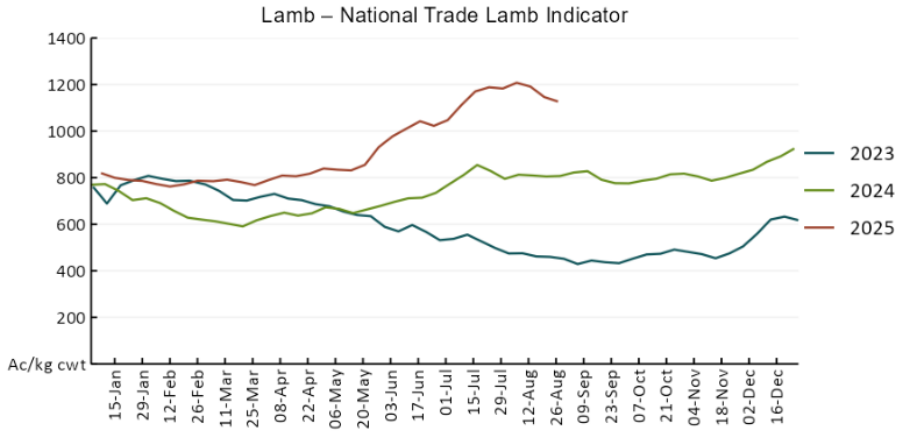


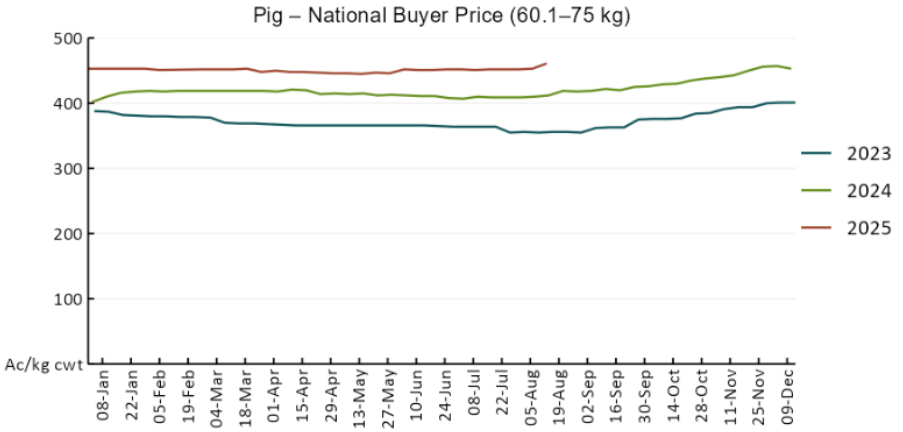

Grain Sorghum – FOB Brisbane, QLD
600
500
400
300
200
100
A$/t
08-Jan
22-Jan
05-Feb
19-Feb
04-Mar
18-Mar
01-Apr
15-Apr
29-Apr
13-May
27-May
10-Jun
24-Jun
08-Jul
22-Jul
05-Aug
19-Aug
02-Sep
16-Sep
30-Sep
14-Oct
28-Oct
11-Nov
25-Nov
09-Dec
23-Dec
2023
2024
2025

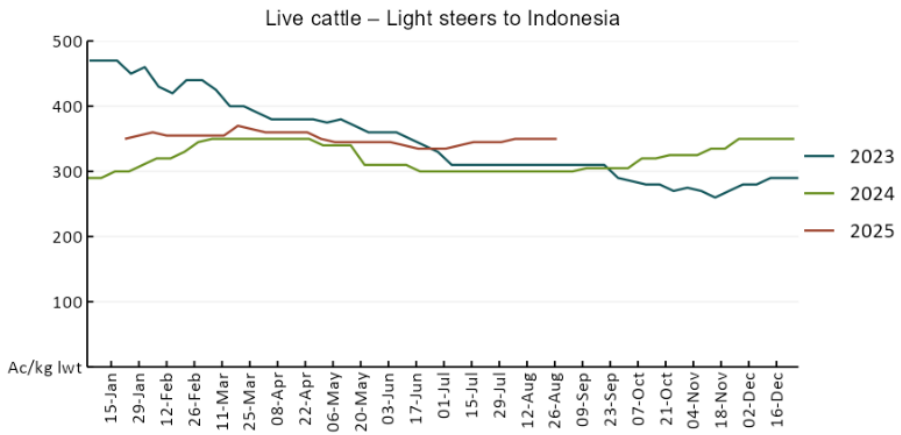
3.3 Selected domestic livestock indicator prices



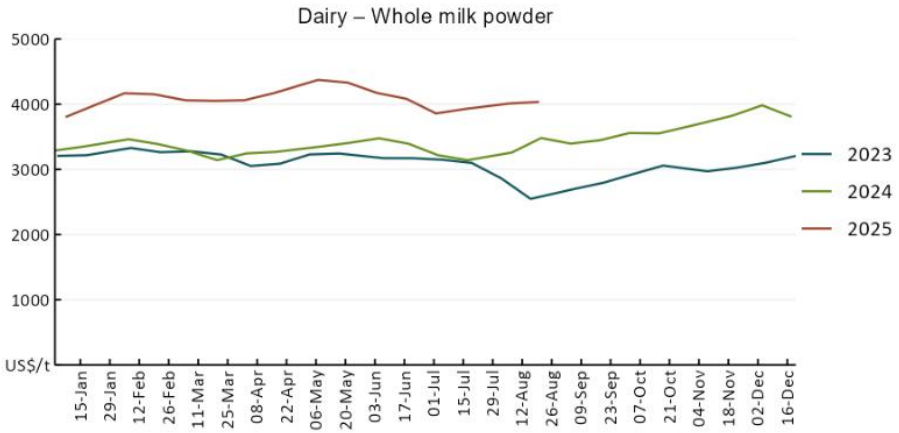


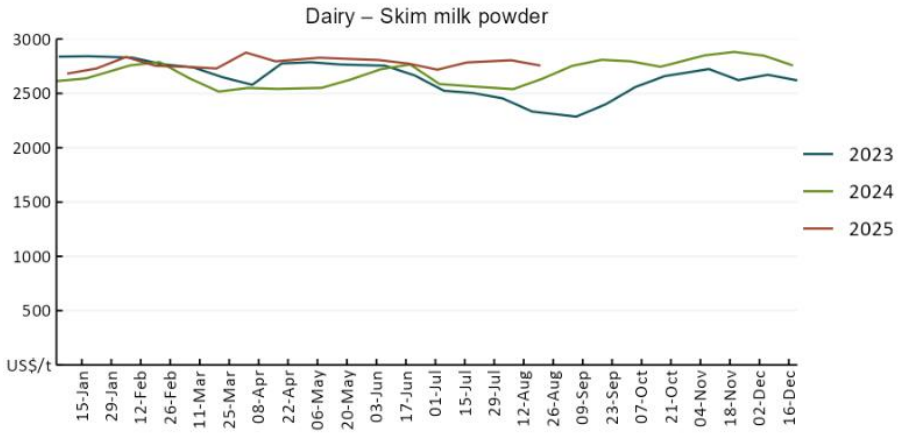


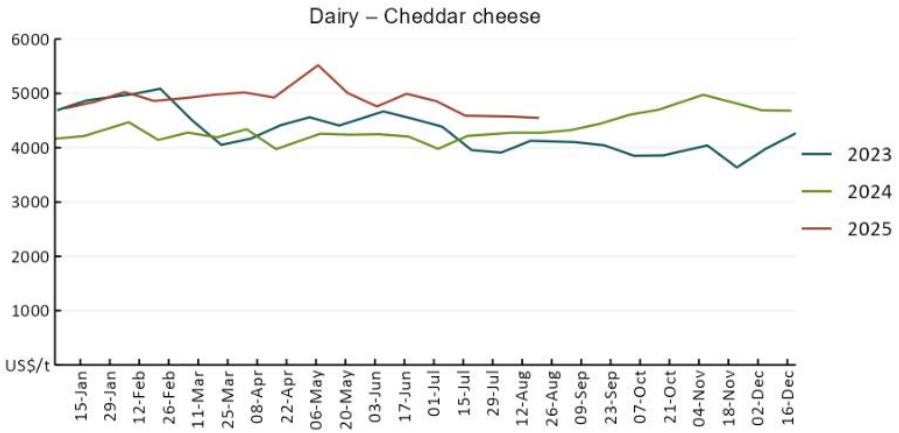


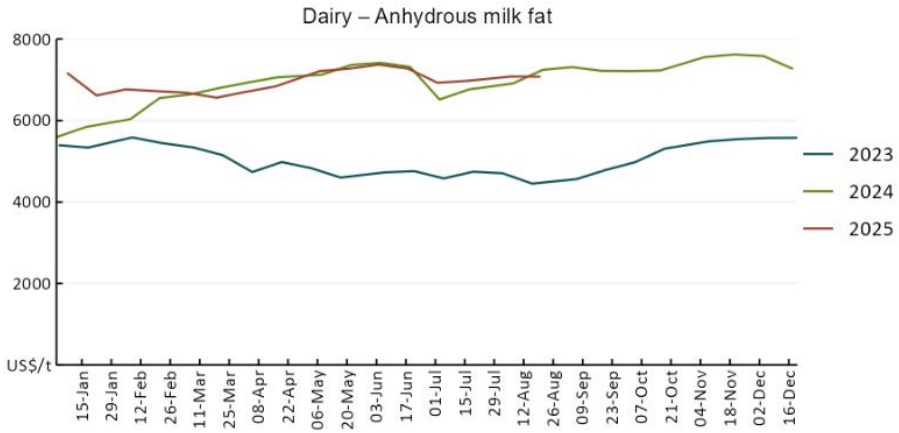

Live cattle – Light steers to Indonesia
500
400
300
200
100
Ac/kg lwt
15-Jan
29-Jan
12-Feb
26-Feb
11-Mar
25-Mar
08-Apr
22-Apr
06-May
20-May
03-Jun
17-Jun
01-Jul
15-Jul
29-Jul
12-Aug
26-Aug
09-Sep
23-Sep
07-Oct
21-Oct
04-Nov
18-Nov
02-Dec
16-Dec
2023
2024
2025

3.4 Global Dairy Trade (GDT) weighted average prices

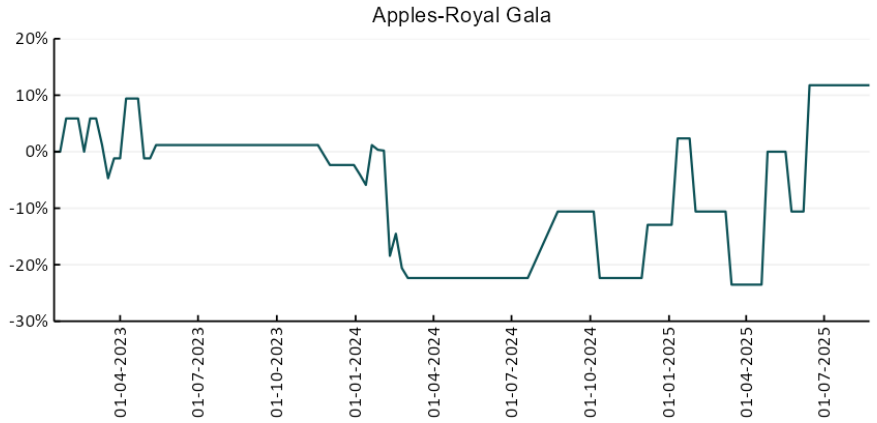


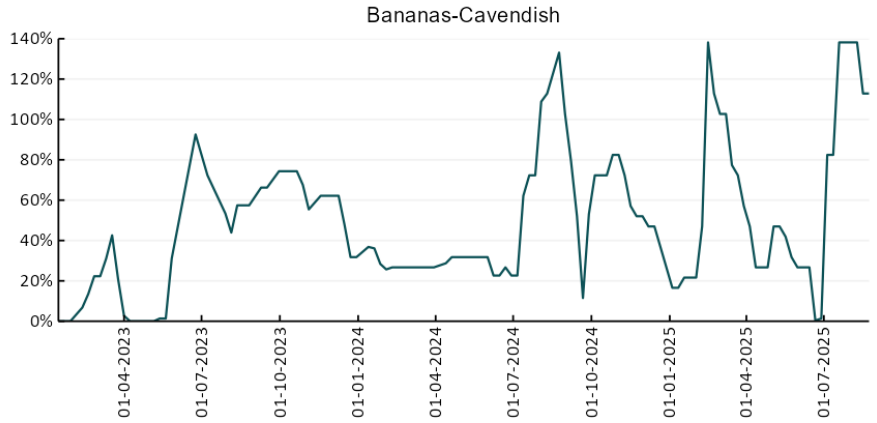


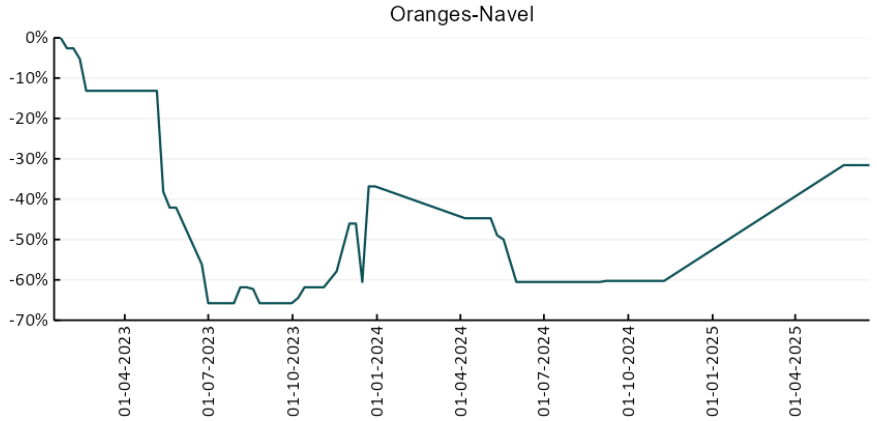


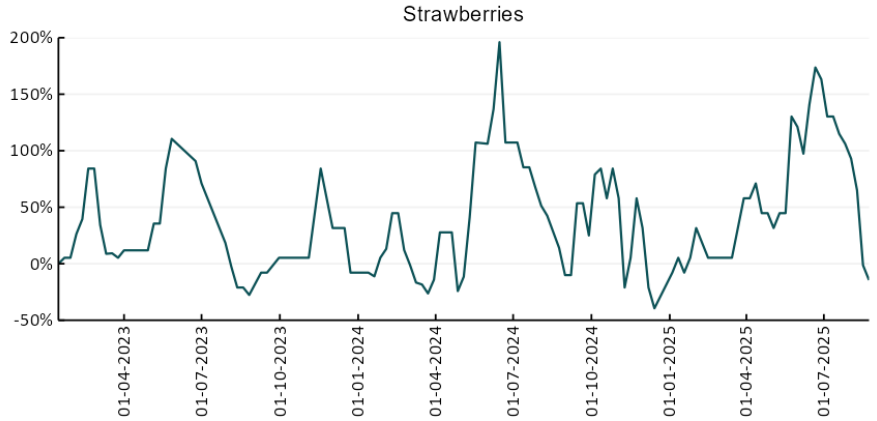


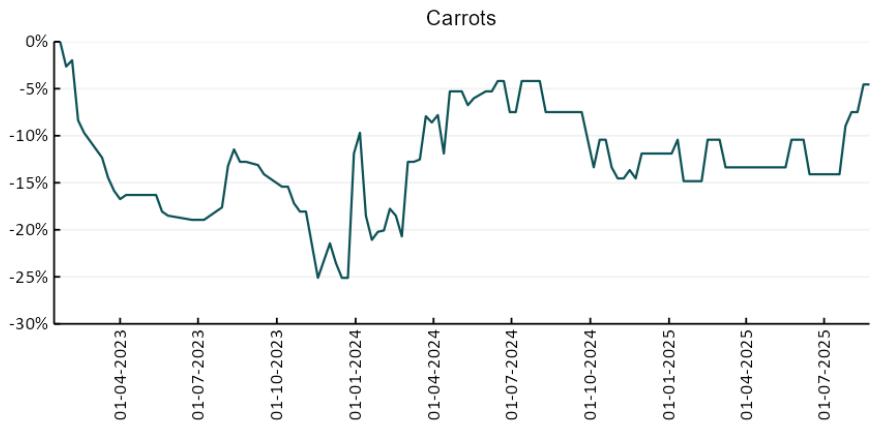
3.5 Selected fruit and vegetable prices

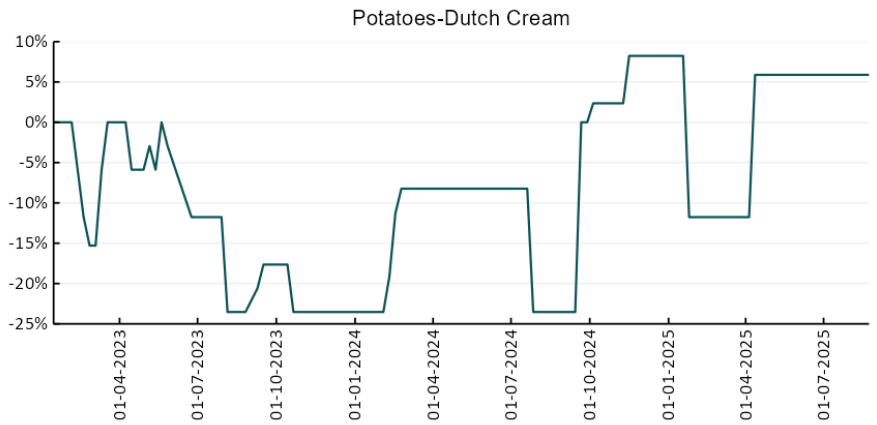


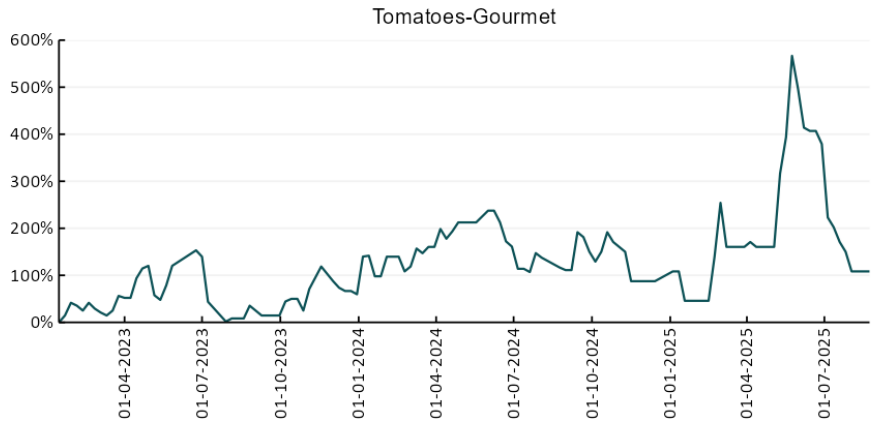


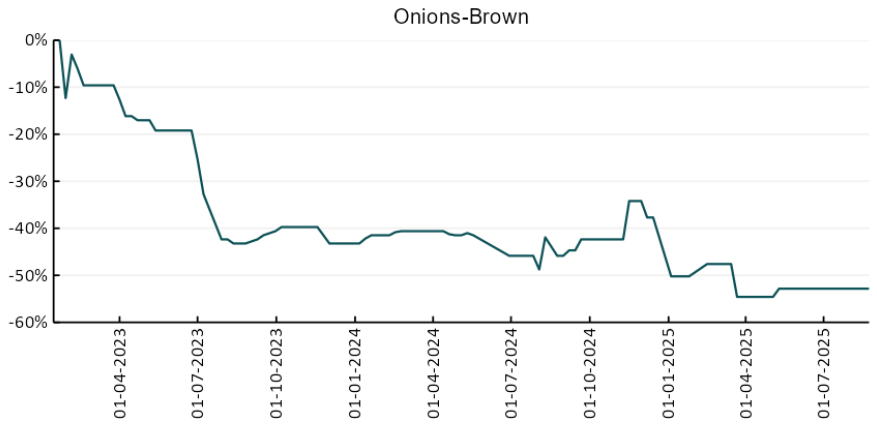




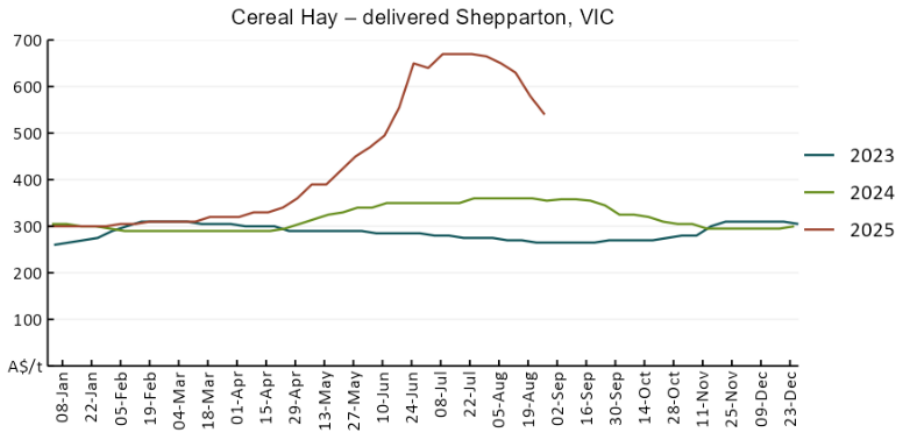

Carrots
0%
-5%
-10%
-15%
-20%
-25%
-30%
01-04-2023
01-07-2023
01-10-2023
01-01-2024
01-04-2024
01-07-2024
01-10-2024
01-01-2025
01-04-2025
01-07-2025

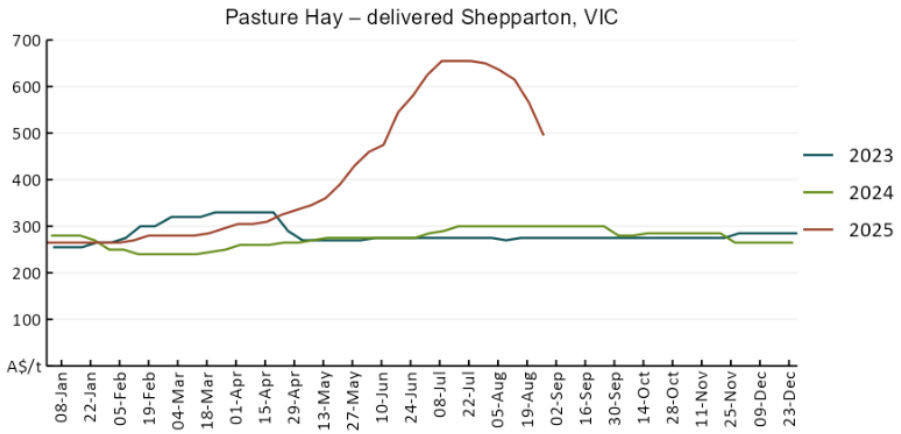

Potatoes-Dutch Cream
10%
5%
0%
-5%
-10%
-15%
-20%
-25%
01-04-2023
01-07-2023
01-10-2023
01-01-2024
01-04-2024
01-07-2024
01-10-2024
01-01-2025
01-04-2025
01-07-2025

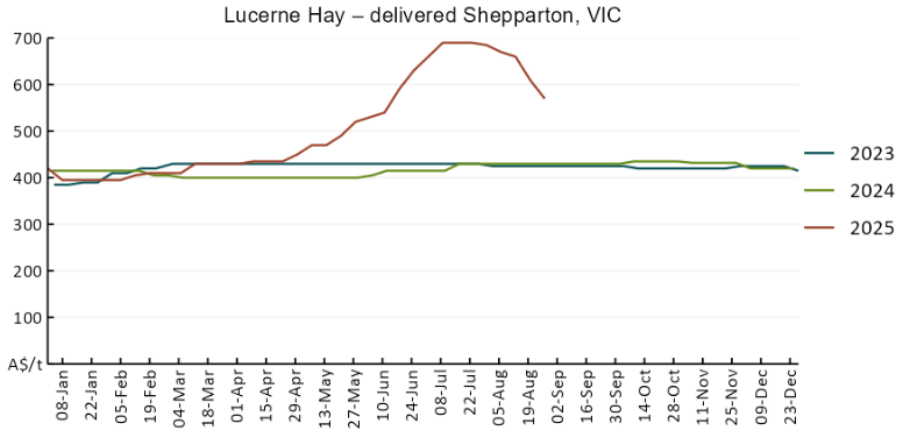

Tomatoes-Gourmet
600%
500%
400%
300%
200%
100%
0%
01-04-2023
01-07-2023
01-10-2023
01-01-2024
01-04-2024
01-07-2024
01-10-2024
01-01-2025
01-04-2025
01-07-2025


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
01-07-2025

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, 28 August 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 Matt Miller.