



Weekly Australian Climate, Water and Agricultural Update

No. 38/2025

25 September 2025

Summary of key issues

- In the week ending 24 September 2025, cold fronts brought rainfall to parts of northern and eastern Australia.
 - Rainfall was low across most winter cropping regions in the week ending 24 September 2025.
 - Most regions in Western Australia, South Australia, Victoria, and southern New South Wales recorded rainfall totals of 0-5 millimetres over the period. In regions that have experienced consecutive weeks of low rainfall, this is likely to have contributed to adverse yield outcomes for crops.
 - Higher rainfall totals of between 5-25 millimetres were recorded in Queensland, northern New South Wales, with isolated areas seeing up to 50 millimetres.
- Over the coming eight days to 2 October 2025, limited rainfall is expected across most cropping regions.
 - Falls of between 5-15 millimetres are forecast across cropping regions in Victoria and southern New South Wales, while southeastern South Australia is likely to see 5-10 millimetres. If realised, these falls are likely to support crop and pasture growth and development.
 - Meanwhile most cropping regions of Western Australia, western South Australia, northern New South Wales, and Queensland are forecast to receive little rainfall. Crops and pastures in these regions will likely draw on stored soil moisture to support growth.
- The national rainfall outlook for October to December 2025 indicates an increased probability of above median rainfall across much of eastern Australia. While parts of western Tasmania are more likely to see below median rainfall, remaining areas have an equal probability of above or below average rainfall
 - If realised, the expectation of average to above average October to December 2025 rainfall across much of Australia would support the finishing of winter crops, as well as supporting spring and early summer pasture growth and the timely planting and establishment of dryland summer crops in eastern Australia.
- Water storage levels in the Murray-Darling Basin (MDB) increased by 63 gigalitres (GL) between 18 September 2025 and 25 September 2025. The current volume of water held in storages is 15,645 GL, equivalent to 70% of total storage capacity. This is -13% or -2,283 GL 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 \$294/ML on 18 September 2025 to \$279/ML on 25 September 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 closed.

1. Climate

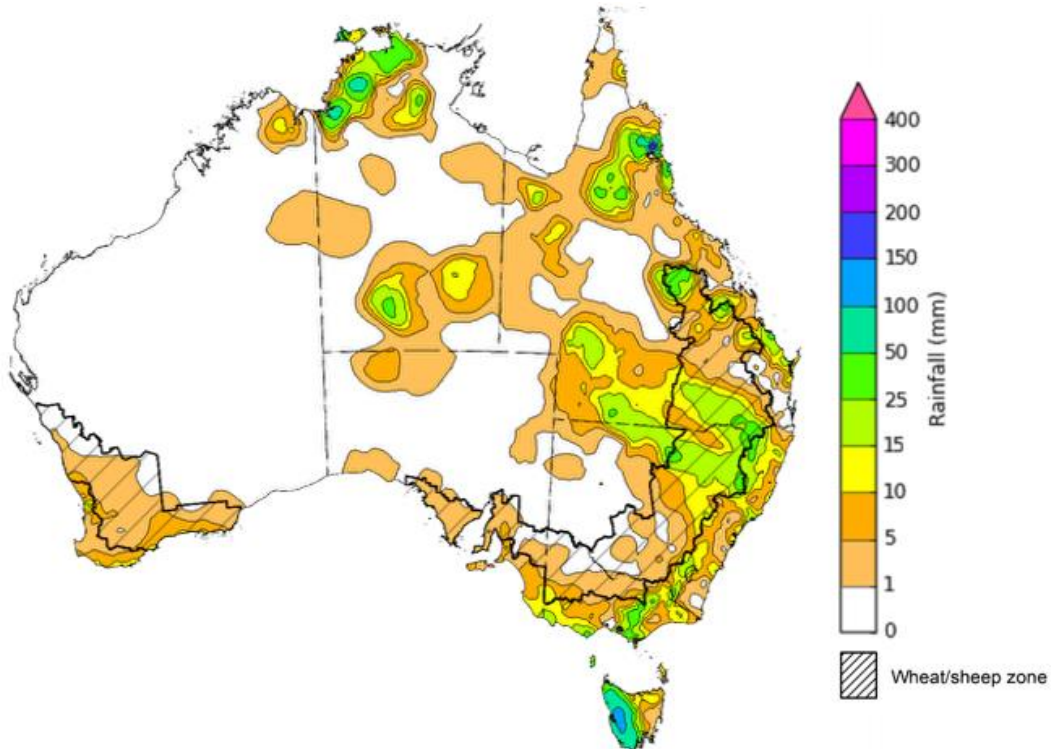
1.1. Rainfall this week

In the week ending 24 September 2025, **cold fronts** brought rainfall to much of eastern and northern Australia, including the Northern Territory, Queensland, much of northeast New South Wales, southern parts of Victoria, and western Tasmania, while much of the remainder of Australia stayed largely dry.

Rainfall was generally low across winter cropping regions in the south for the week ending 24 September 2025.

- Most cropping regions in Western Australia, South Australia, Victoria, and southern New South Wales recorded rainfall totals of 0-5 millimetres over the period.
 - In regions that have experienced consecutive weeks of low rainfall, this is likely to have contributed to adverse yield outcomes for crops as they approach the end of the crop development period.
- Higher rainfall totals of between 5-25 millimetres were recorded in Queensland and northern New South Wales, with isolated areas seeing up to 50 millimetres.

Rainfall for the week ending 24 September 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/>

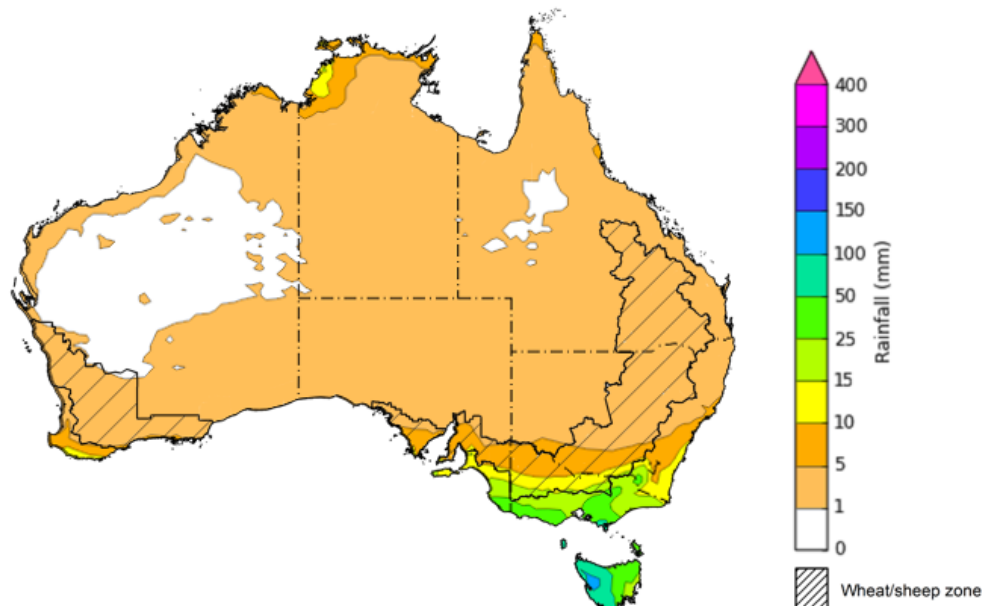
1.2. Rainfall forecast for the next eight days

Over the 8 days to 2nd October 2025, **cold fronts** are expected to bring rainfall to isolated areas of the south of Australia, while central and northern Australia is forecast to remain largely dry.

Rainfall is expected across some southern cropping regions this week, while western and eastern regions are likely to be largely dry.

- Falls of between 5-15 millimetres are forecast in cropping regions across Victoria and southern New South Wales, while South Australia is forecast to receive 5-10 millimetres.
 - If realised these falls are likely to support crop and pasture growth and development.
- Western Australia, northern New South Wales, and Queensland are forecast to see little to no rainfall over the period.
 - These low expected rainfall totals are unlikely to adversely impact crop production outcomes in these areas as crops are likely to draw on stored soil moisture reserves to support growth, and may allow for uninterrupted harvest of early winter crops and planting of early summer crops in northern regions.

Total forecast rainfall for the period 25 September to 2 October 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.

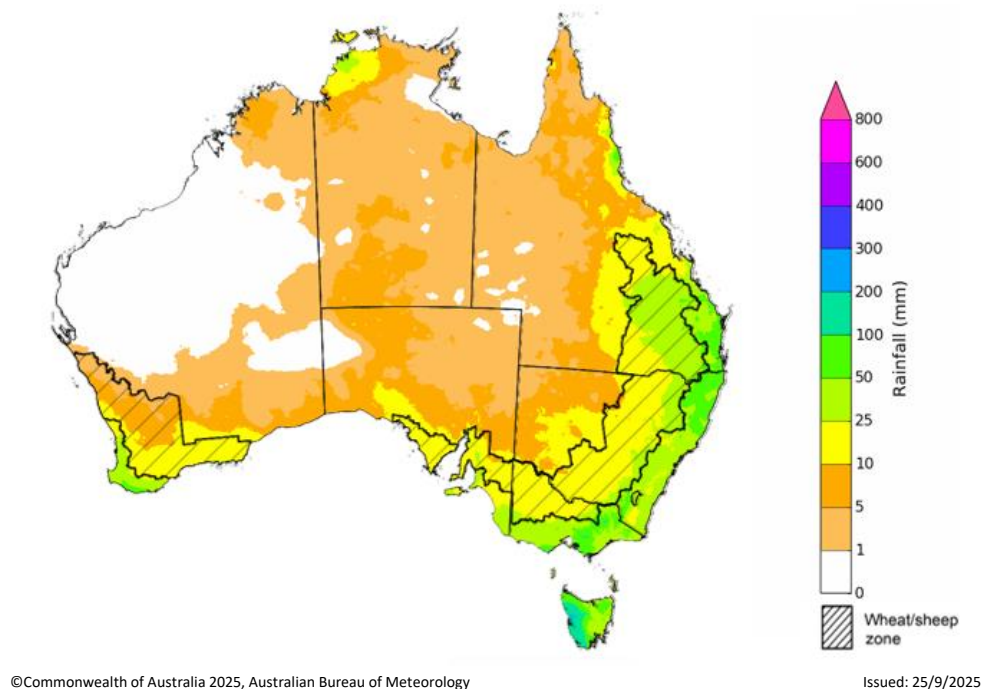
1.3. National Climate Outlook

The El Niño Southern Oscillation (ENSO) is currently neutral and having minimal influence on Australian rainfall. However, the Indian Ocean Dipole (IOD) Index has been negative for 8 weeks, classifying this as a negative IOD event. A negative IOD typically results in above-average spring rainfall over parts of southern Australia. The Southern Annular Mode (SAM) index is also currently negative, but is likely to return to neutral over the coming fortnight.

The most recent **rainfall outlook for October 2025** provided by the Bureau of Meteorology indicates that much of **eastern Australia** is likely to see **above median rainfall**, with parts of **Tasmania** are likely to see below average falls.

- The Bureau of Meteorology's climate model indicates a 75% chance of October rainfall totals between 5-50 millimetres across much of eastern Australia and parts of south-western Western Australia. Despite the increased probabilities of above average rainfall across much of the remainder of northern Australia, October 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 aside from coastal regions typically receives very low rainfall.
- Across cropping regions, there is a **75% chance** of rainfall totals of between **10-50 millimetres across eastern cropping regions**, including Queensland and New South Wales. Much of **South Australia and Victoria** are likely to see 10-25 millimetres, while **Western Australian** cropping regions are likely to see 5-25 millimetres. If realised, this is expected to provide sufficient moisture to support the finishing of winter crops across most growing regions and support the timely planting and establishment of summer crops across Queensland and northern New South Wales.

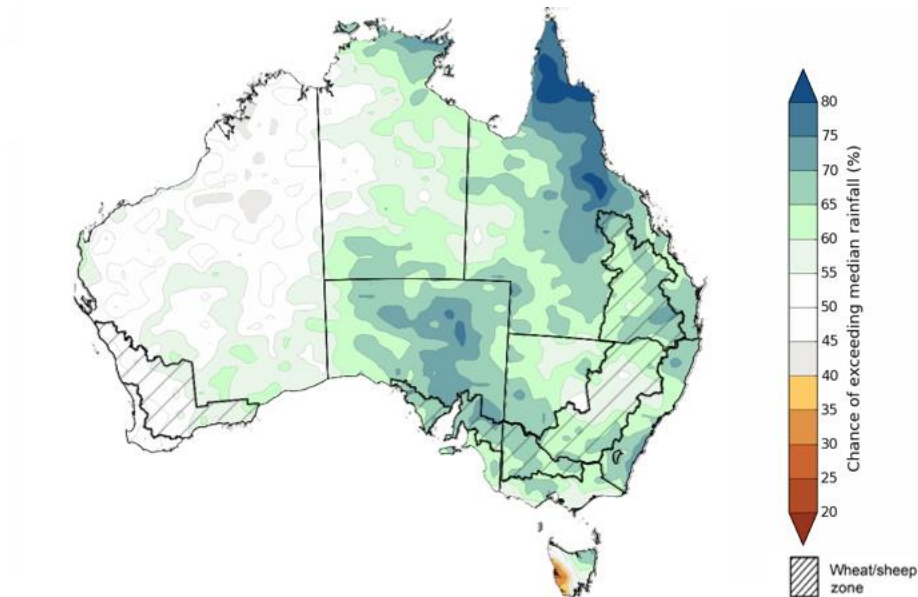
Rainfall totals that have a 75% chance of occurring in October 2025



The **rainfall outlook for October to December 2025** indicates an increased probability of **above median rainfall across much of the eastern two thirds of Australia**, including in Queensland, New South Wales, Victoria, South Australia, eastern Tasmania, southern Western Australia, and the Northern Territory. Parts of western Tasmania are more likely to see below median rainfall, while remaining areas have an equal probability of above or below average rainfall

Across cropping regions, the chance of receiving above median rainfall is 60-70% across Queensland, southern New South Wales, South Australia and Victoria. In Western Australia and northern New South Wales, the probability of above median rainfall is lower at 45-65%.

Chance of exceeding the median rainfall October 2025 to December 2025



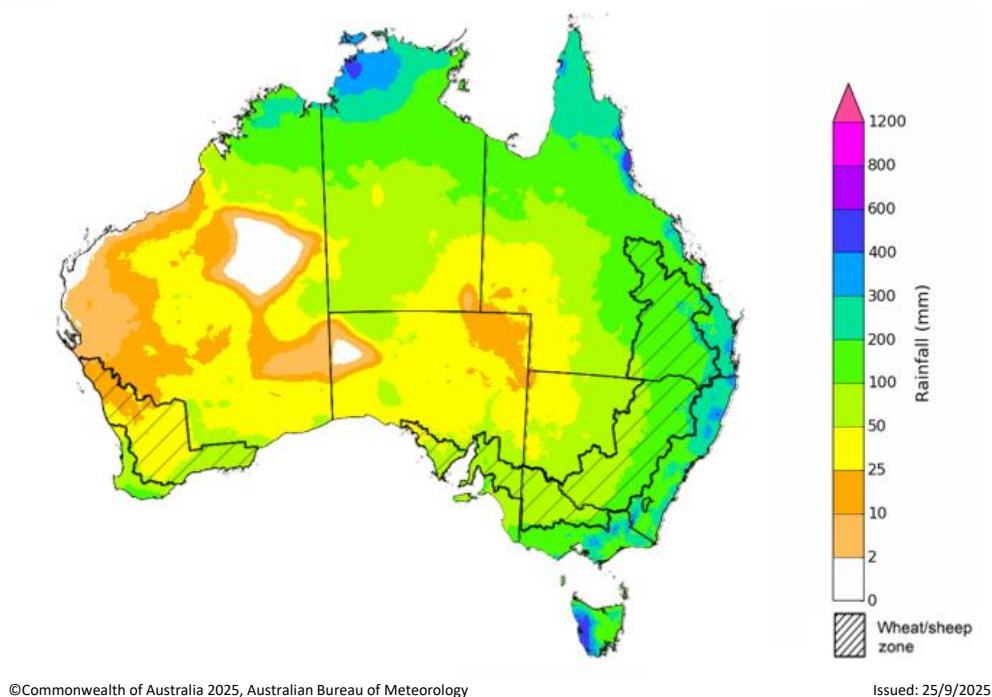
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The **rainfall outlook for October through to December 2025** suggests a 75% chance of receiving rainfall totals of between 50-400 millimetres across much of eastern and northern Australia, including Queensland, New South Wales, Victoria, the Northern Territory and northern Western Australia. Between 400-600 millimetres are expected across western Tasmania and alpine areas of New South Wales and Victoria, as well as parts of the northern tropics. Lower rainfall totals are forecast for central and western regions, with South Australia and southern Western Australia likely to see 25-100 millimetres of rainfall.

In **cropping regions**, there is a **75% chance** of receiving between **50-200 millimetres** across **much of Queensland and New South Wales**. In **Western Australia**, falls of **10-100 millimetres** are expected, with **Victoria and much of South Australia** likely to see **50-100 millimetres**. If realised, these falls are likely to be sufficient to support the finishing of winter crops, and the timely planting and establishment of dryland summer crops in eastern Australia.

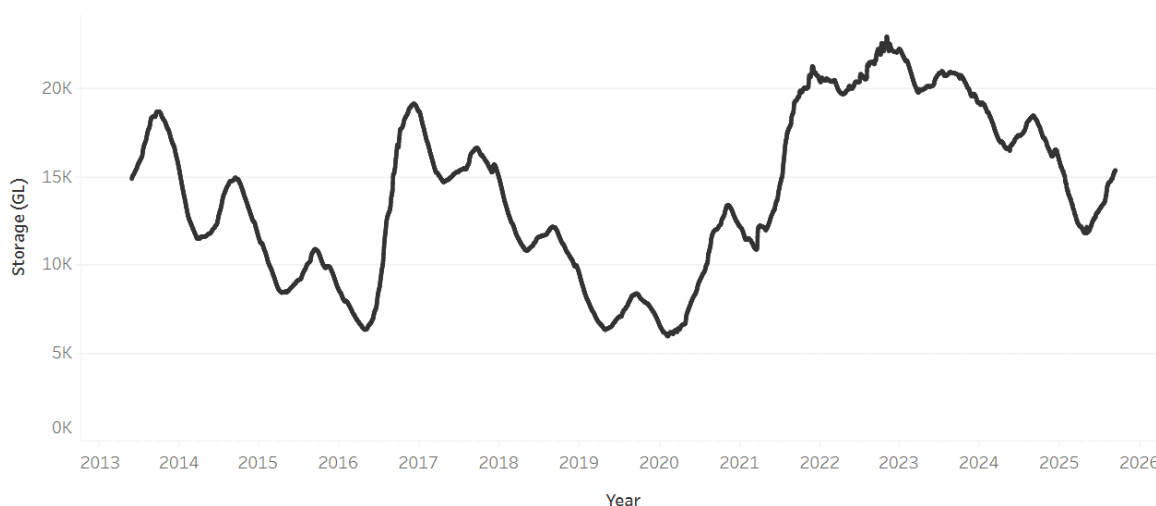
Rainfall totals that have a 75% chance of occurring October 2025 to December 2025



1.4. Water markets – current week

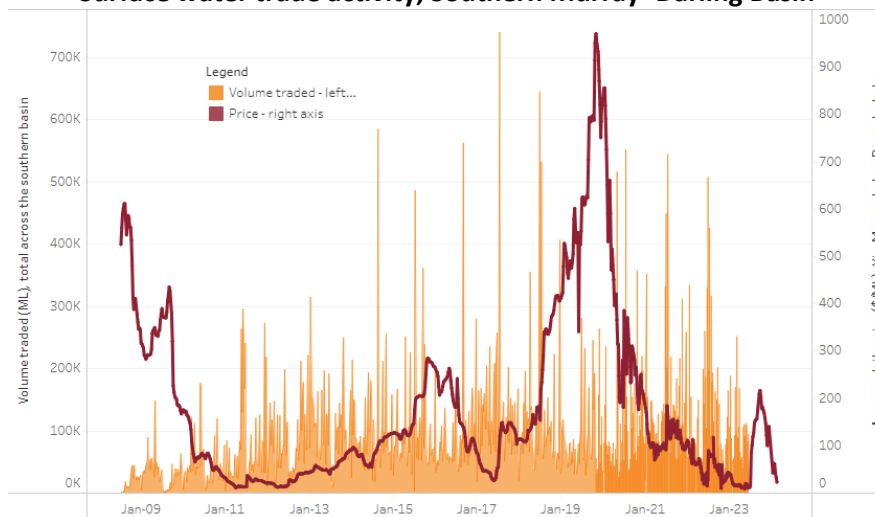
Water storage levels in the Murray-Darling Basin (MDB) increased by 63 gigalitres (GL) between 18 September 2025 and 25 September 2025. The current volume of water held in storages is 15,645 GL, equivalent to 70% of total storage capacity. This is -13% or -2,283 GL less than the same time last year. 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 \$294/ML on 18 September 2025 to \$279/ML on 25 September 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 closed.

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.

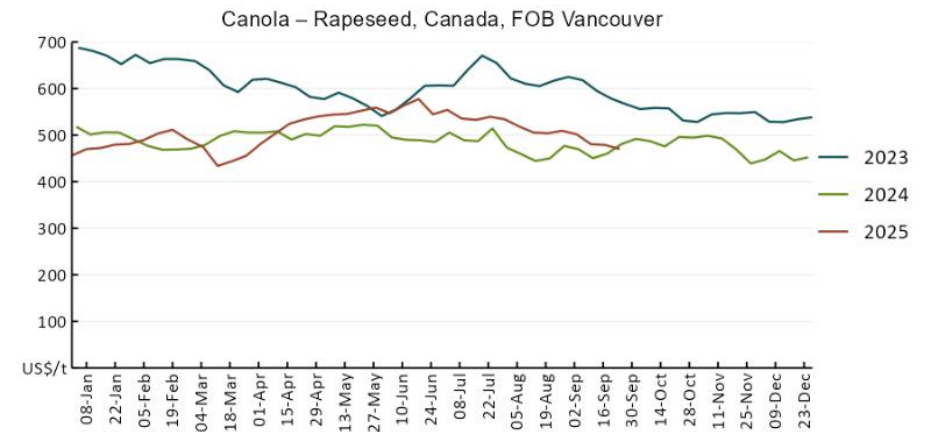
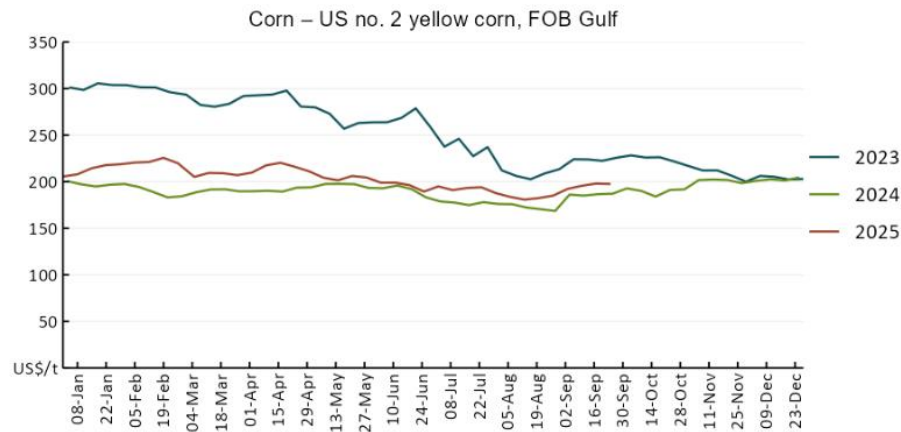
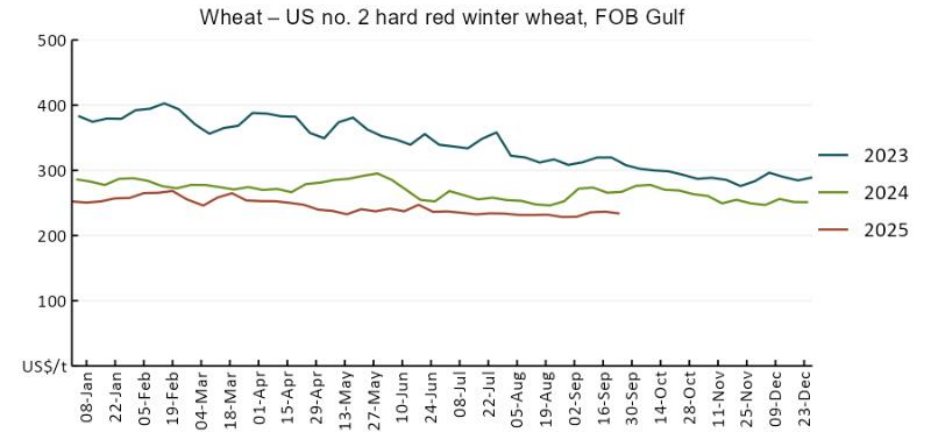
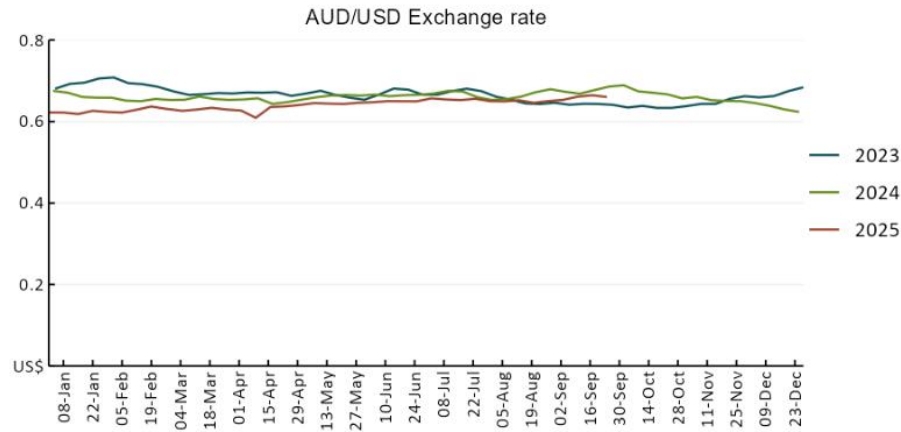
To access the full, interactive, weekly water dashboard, which contains the latest and historical water storage, water market and water allocation information, please visit

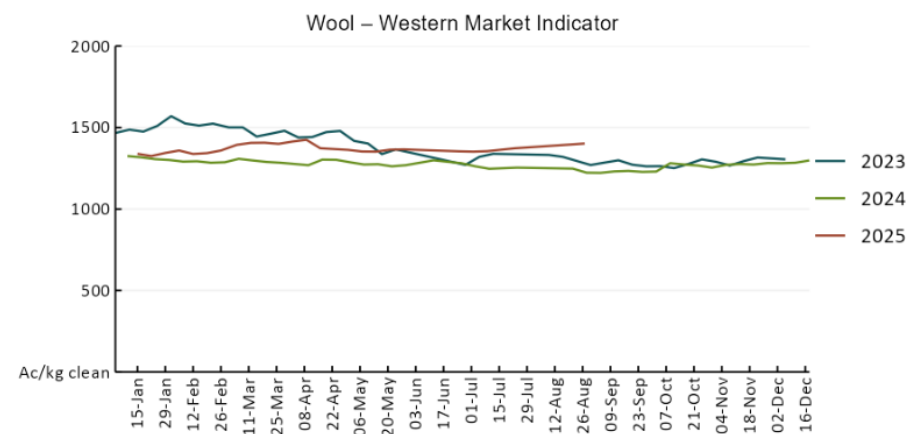
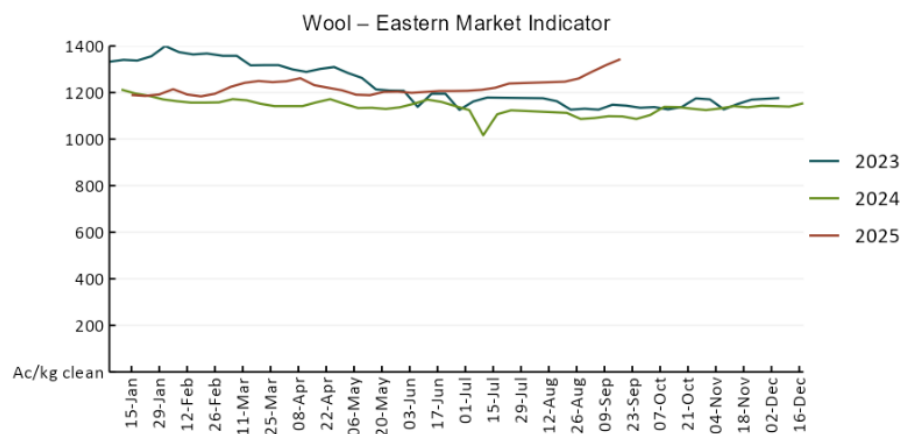
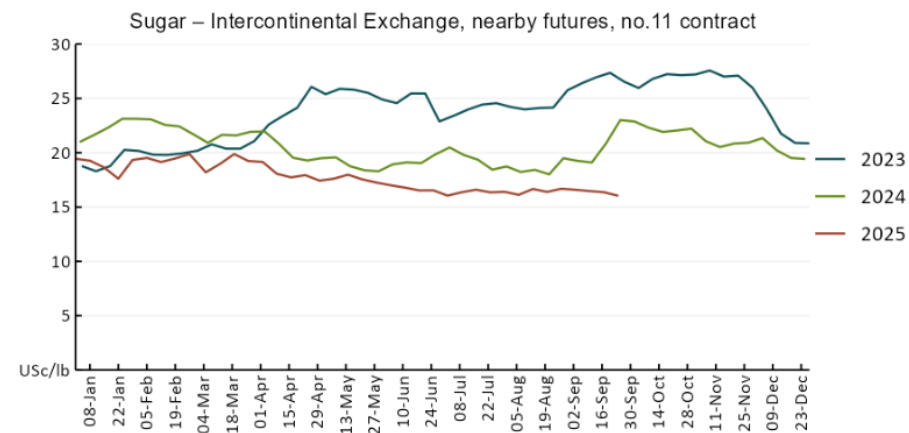
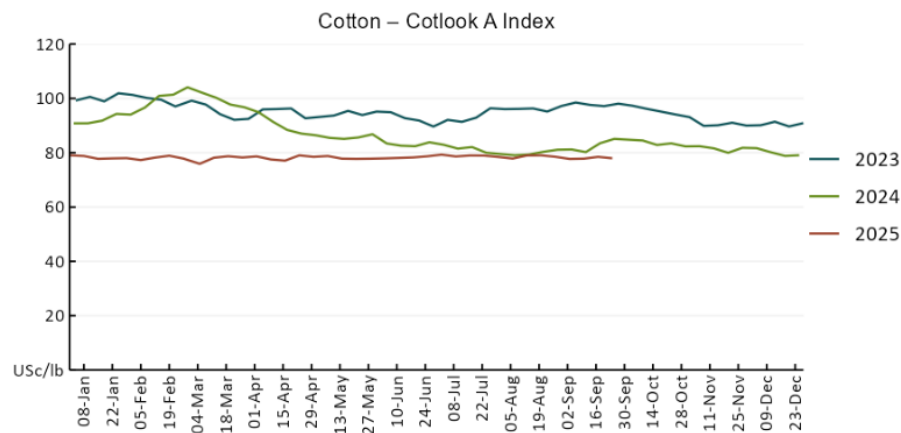
https://www.agriculture.gov.au/abares/products/weekly_update/weekly-update-180925

2. Commodities

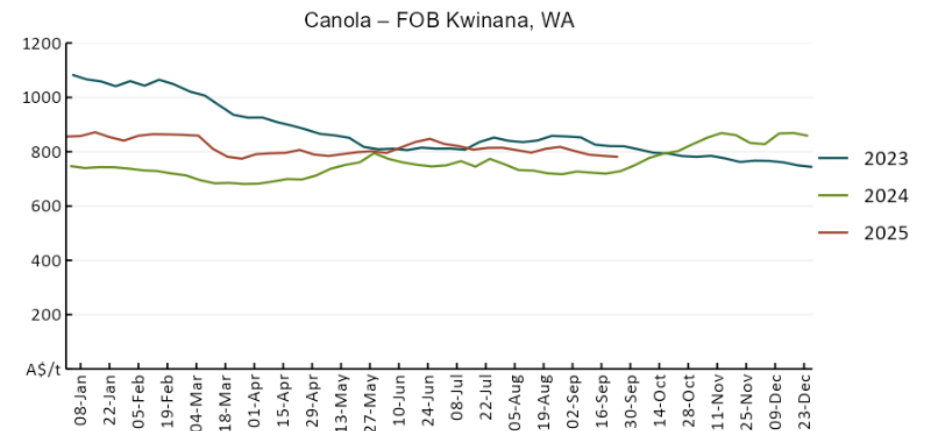
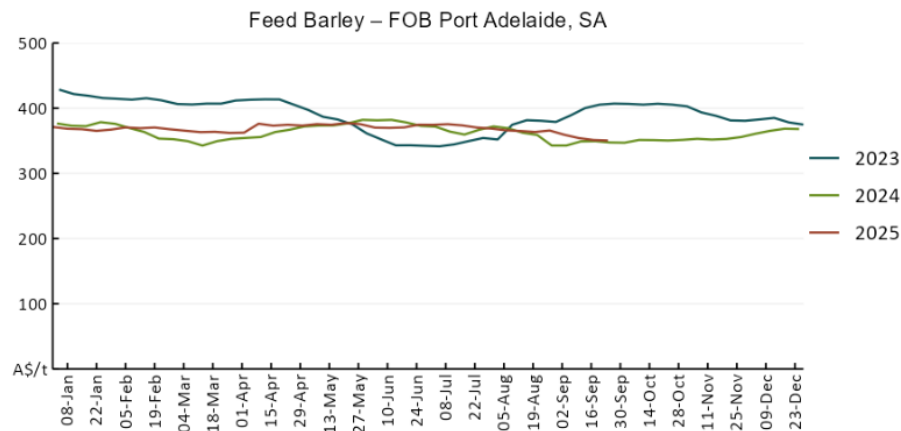
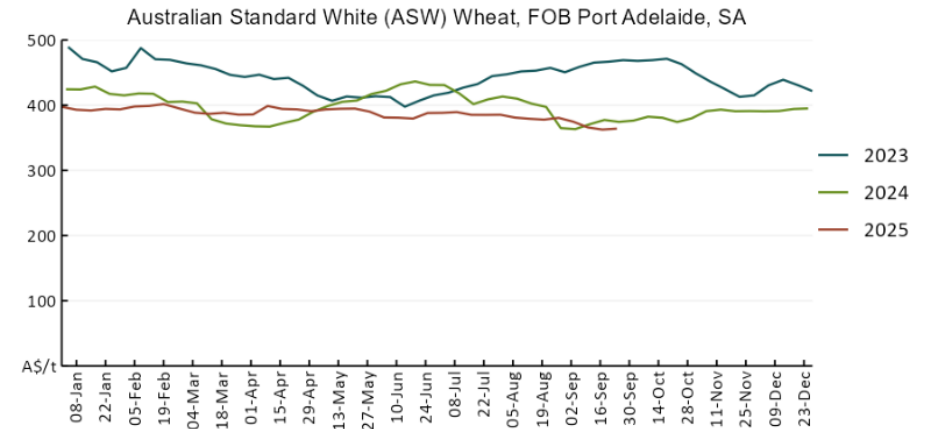
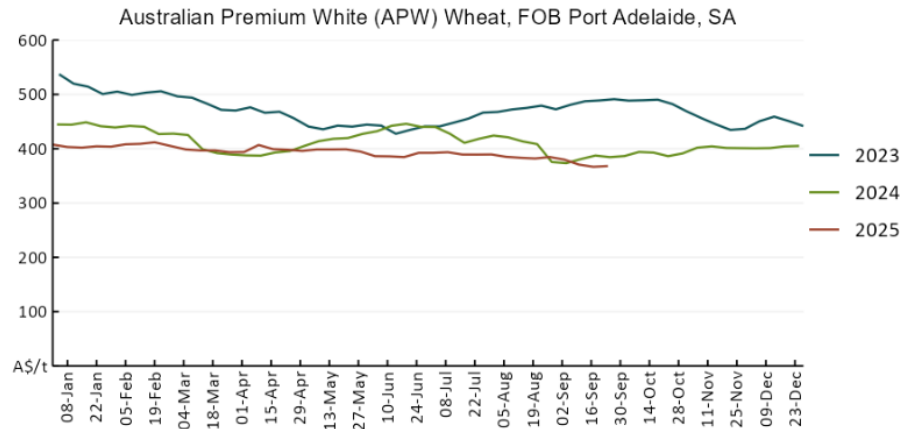
Indicator	Week average	Unit	Latest Price	Previous Week	Weekly change	Price 12 months ago	Annual change
Selected world indicator prices							
AUD/USD Exchange rate	24-Sep	A\$/US\$	0.66	0.66	-1%	0.68	-2%
Wheat – US no. 2 hard red winter wheat, FOB Gulf	24-Sep	US\$/t	234	237	-1%	270	-13%
Corn – US no. 2 yellow corn, FOB Gulf	24-Sep	US\$/t	198	198	0%	186	6%
Canola – Rapeseed, Canada, FOB Vancouver	24-Sep	US\$/t	470	479	-2%	465	1%
Cotton – Cotlook A Index	24-Sep	USc/lb	78.0	78.5	-1%	82.5	-6%
Sugar – Intercontinental Exchange, nearby futures, no.11 contract	24-Sep	USc/lb	16.0	16.4	-2%	20.6	-22%
Wool – Eastern Market Indicator	17-Sep	Ac/kg clean	1,344	1,319	2%	1,094	23%
Wool – Western Market Indicator	27-Aug	Ac/kg clean	1,402	1,396	0%	1,229	14%
Selected Australian grain export prices							
Australian Premium White (APW) Wheat, FOB Port Adelaide, SA	24-Sep	A\$/t	368	367	0%	382	-4%
Australian Standard White (ASW) Wheat, FOB Port Adelaide, SA	24-Sep	A\$/t	364	363	0%	372	-2%
Feed Barley – FOB Port Adelaide, SA	24-Sep	A\$/t	351	351	0%	347	1%
Canola – FOB Kwinana, WA	24-Sep	A\$/t	781	784	0%	724	8%
Grain Sorghum – FOB Brisbane, QLD	24-Sep	A\$/t	404	406	0%	381	6%
Selected domestic livestock indicator prices							
Beef – Eastern Young Cattle Indicator	24-Sep	Ac/kg cwt	896	895	0%	669	34%
Mutton – Mutton indicator (18–24 kg fat score 2–3), VIC	24-Sep	Ac/kg cwt	768	758	1%	318	142%
Lamb – National Trade Lamb Indicator	24-Sep	Ac/kg cwt	1,184	1,182	0%	805	47%
Pig – Eastern Seaboard (60.1–75 kg), NSW buyer price	10-Sep	Ac/kg cwt	462	461	0%	422	10%
Live cattle – Light steers to Indonesia	27-Aug	Ac/kg lwt	350	350	0%	304	15%
Global Dairy Trade (GDT) weighted average prices							
Dairy – Whole milk powder	17-Sep	US\$/t	3,790	3,809	0%	3,422	11%
Dairy – Skim milk powder	17-Sep	US\$/t	2,615	2,620	0%	2,781	-6%
Dairy – Cheddar cheese	17-Sep	US\$/t	4,814	4,709	2%	4,383	10%
Dairy – Anhydrous milk fat	17-Sep	US\$/t	6,802	6,917	-2%	7,266	-6%

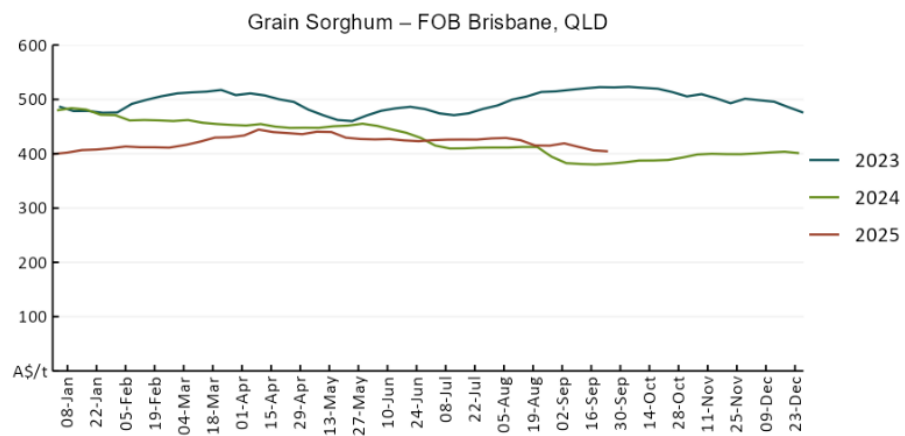
2.1. Selected world indicator prices



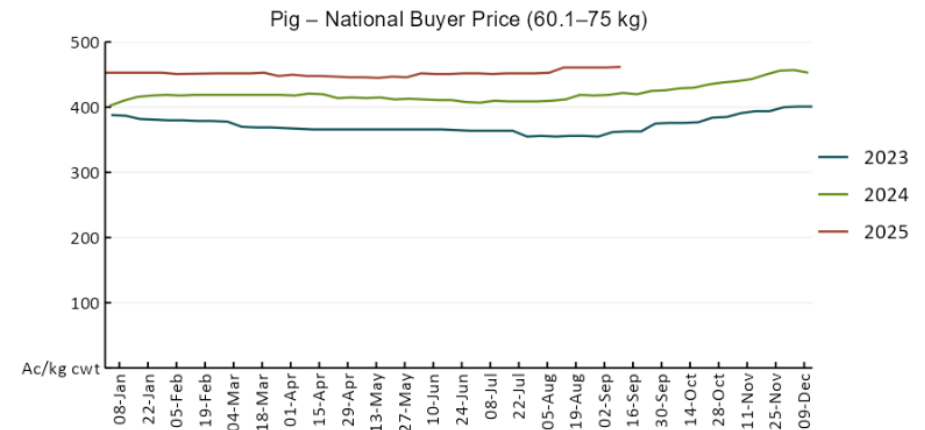
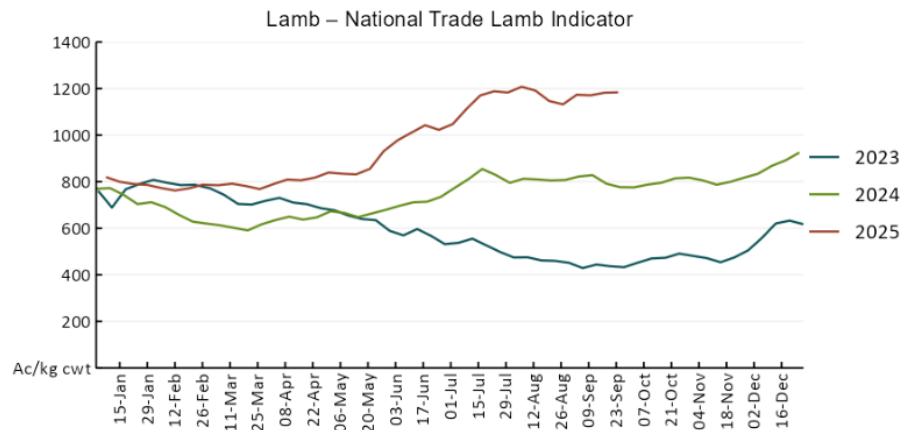
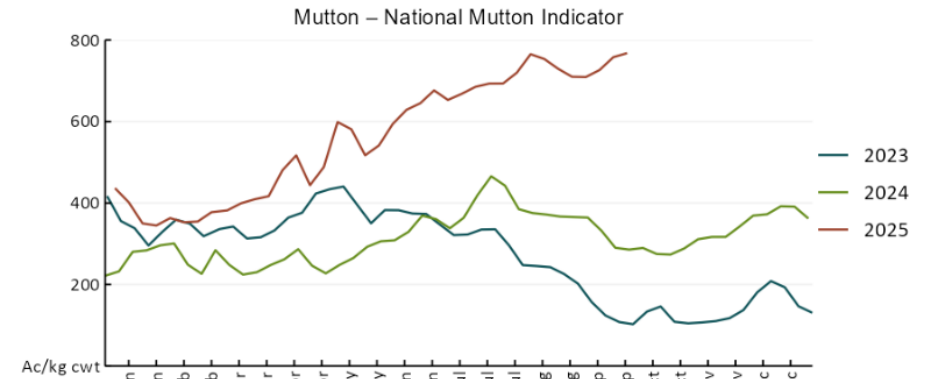
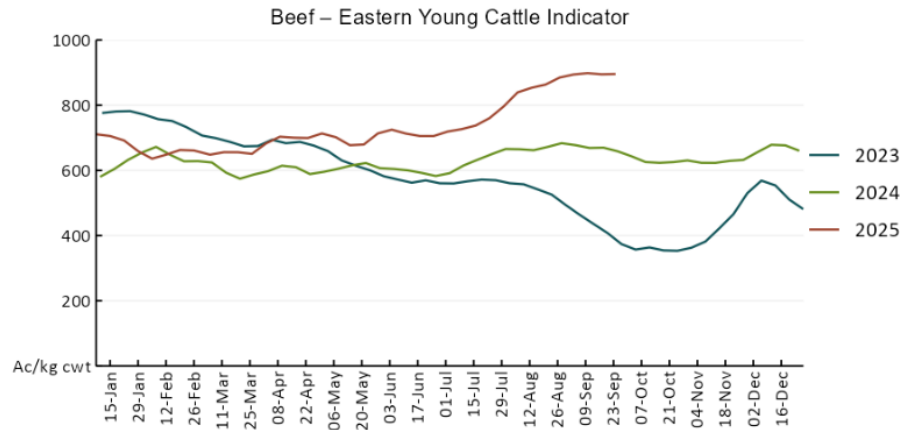


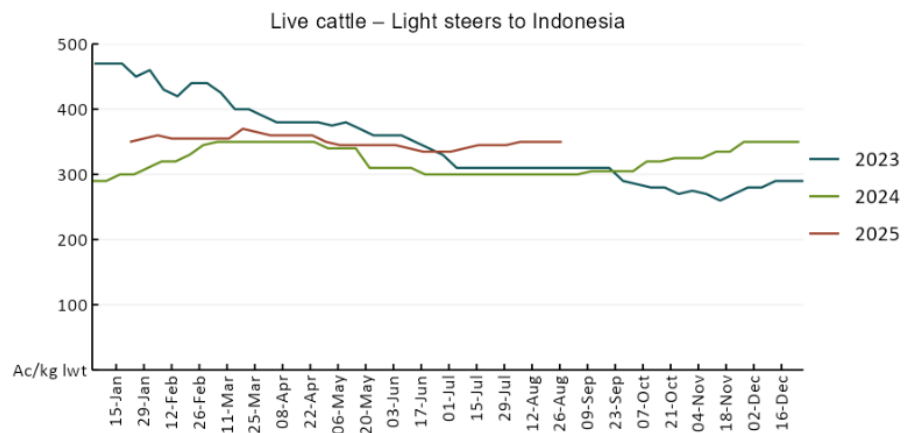
3.2 Selected domestic crop indicator prices



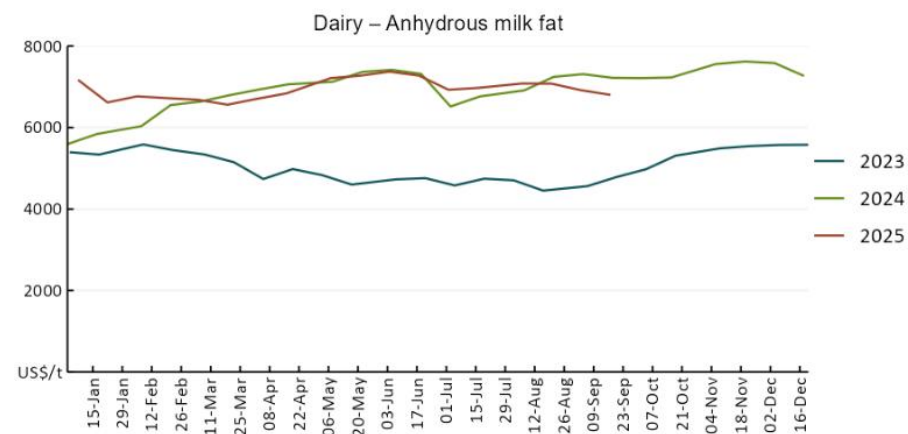
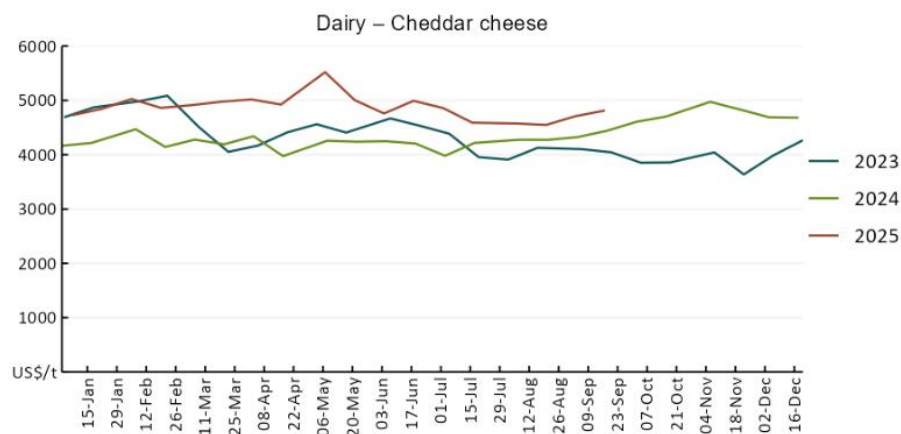
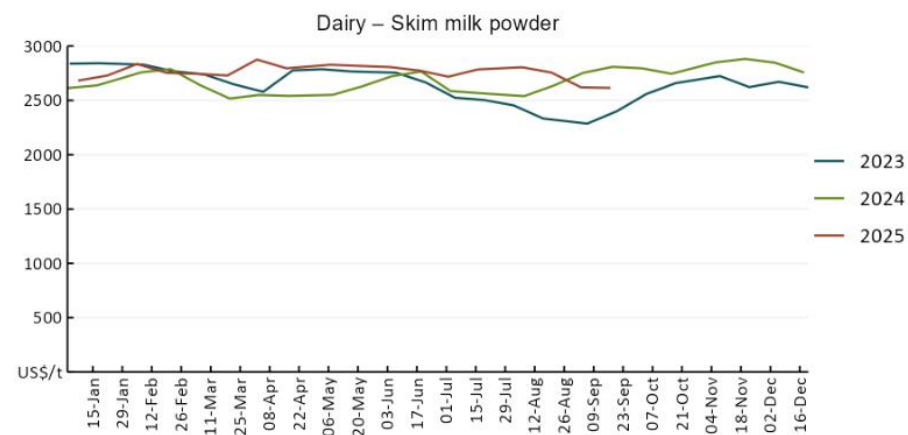
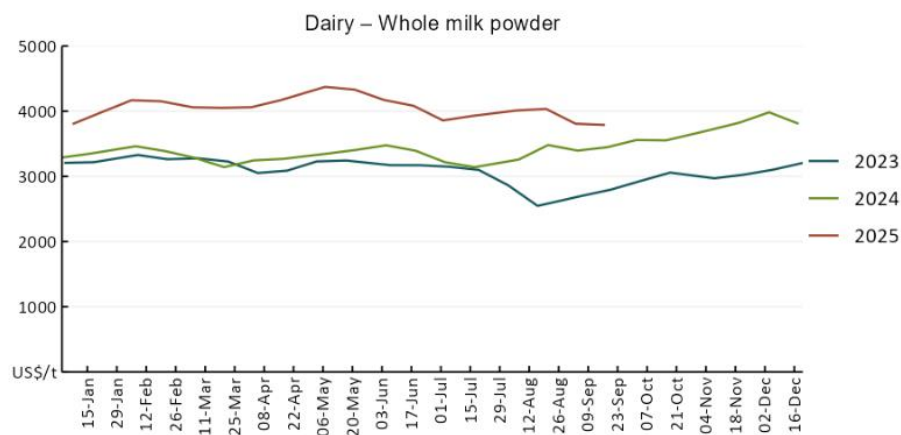


3.3 Selected domestic livestock indicator prices

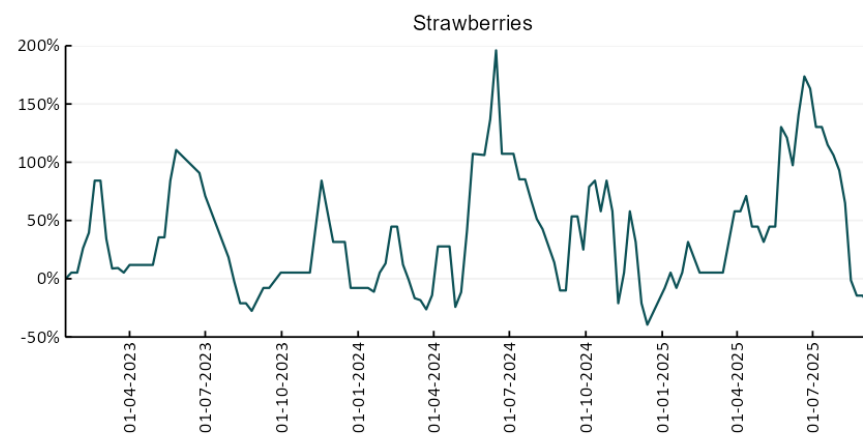
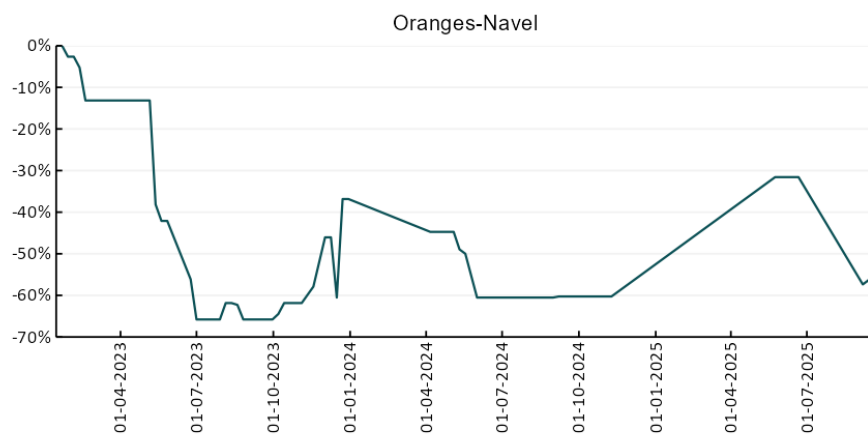
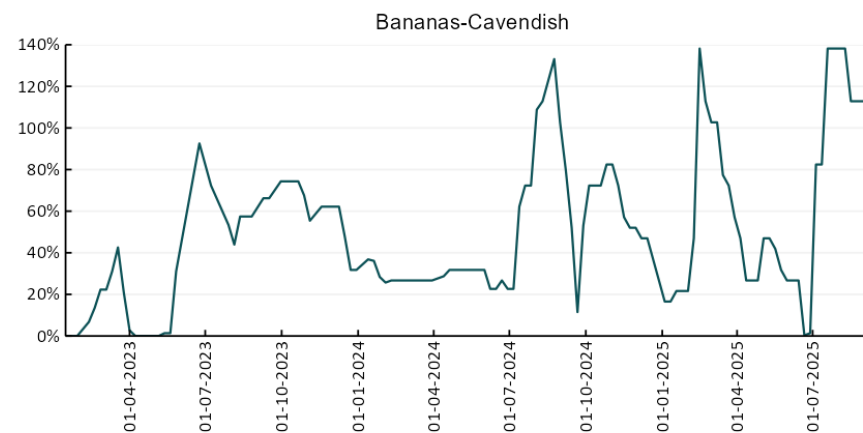
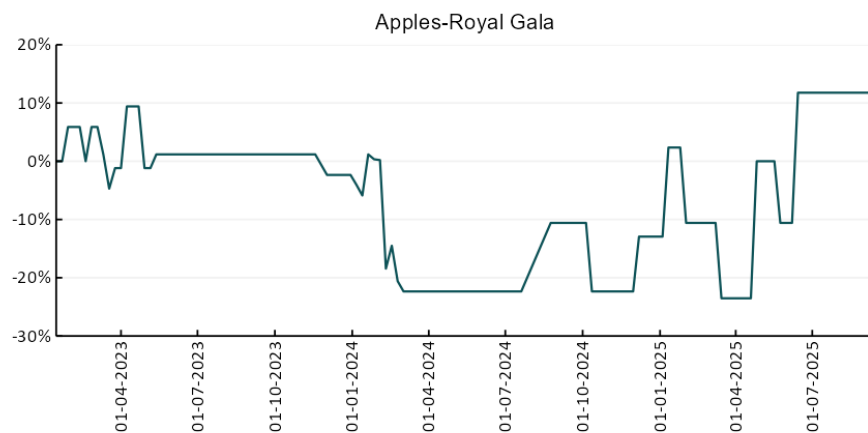


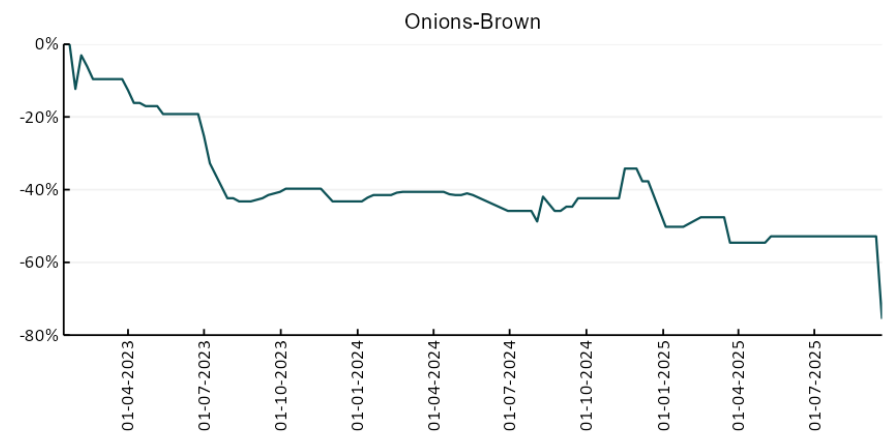
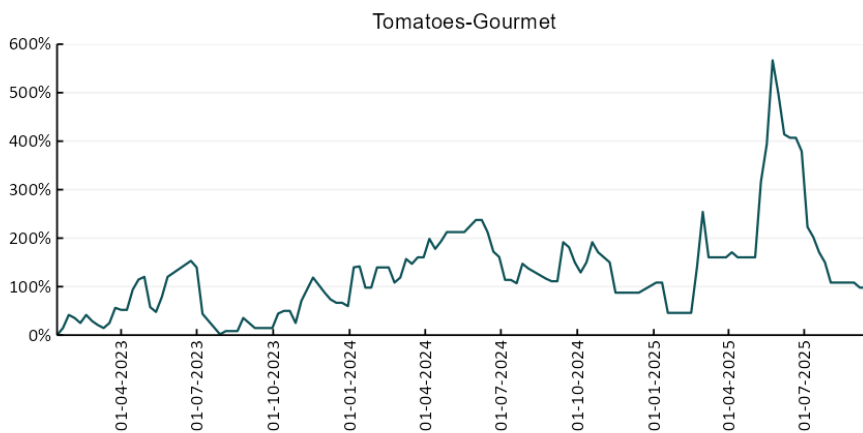
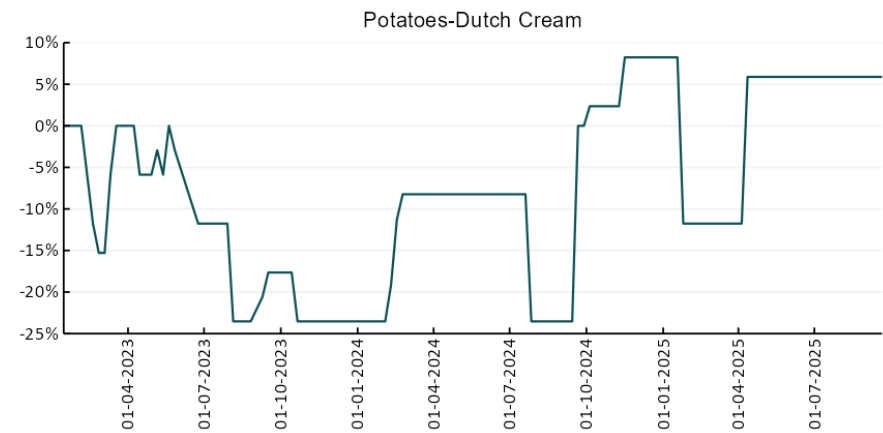
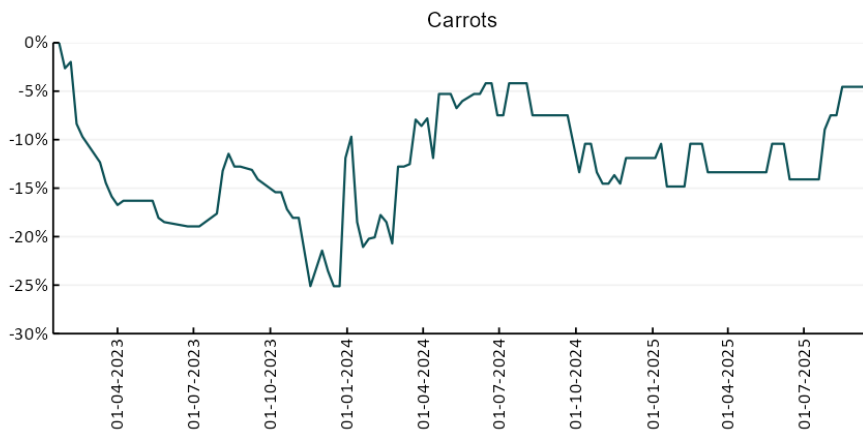


3.4 Global Dairy Trade (GDT) weighted average prices

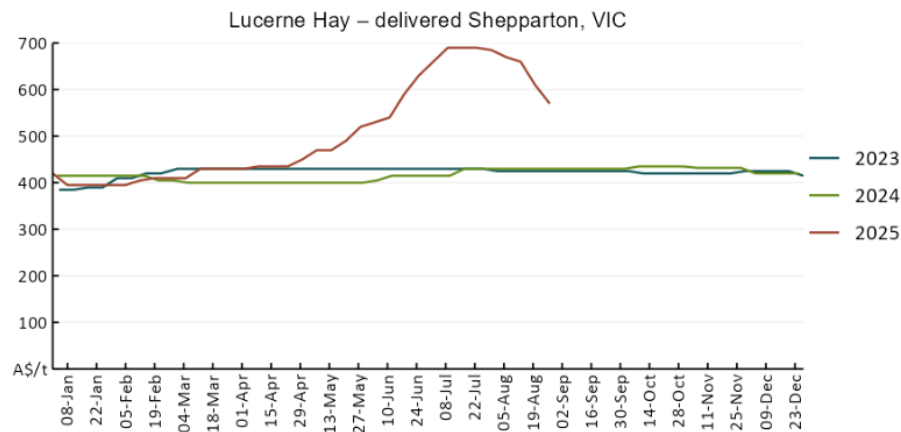
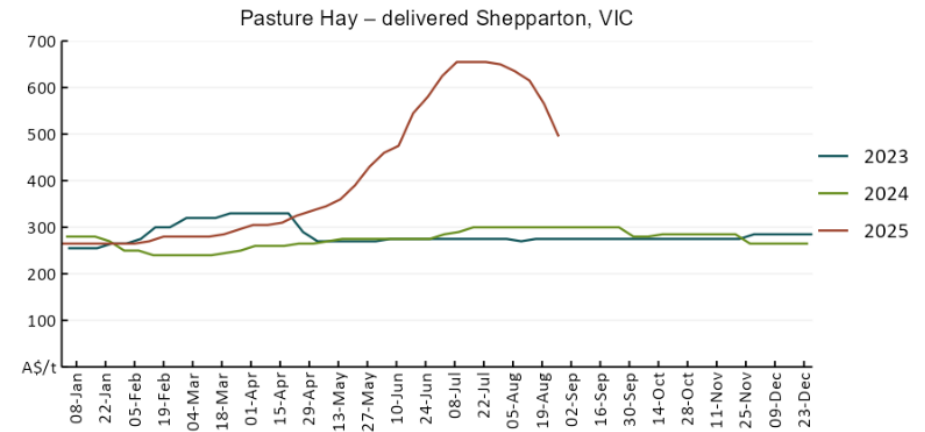
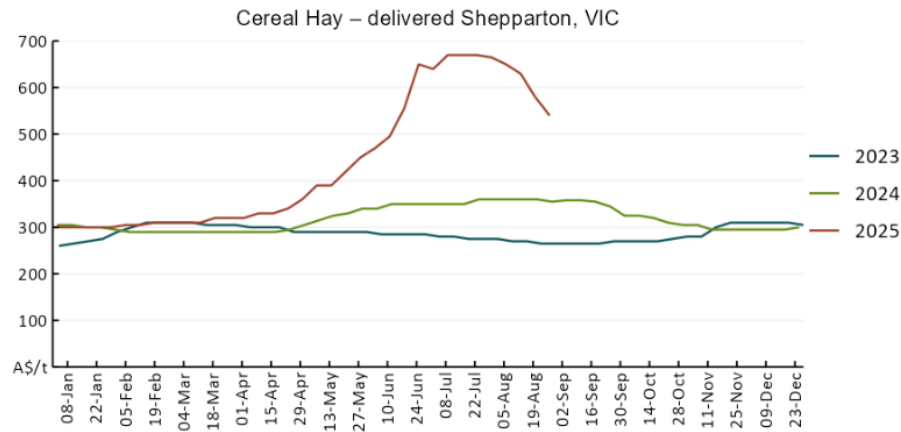


3.5 Selected fruit and vegetable prices





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/
- 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 CPTC/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://rsmets-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.watnsw.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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Department of Agriculture, Fisheries and Forestry

GPO Box 858 Canberra ACT 2601

Telephone 1800 900 090

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