Australian Government
Department of Agriculture, Fisheries and Forestry

ABARES

Weekly Australian Climate, Water and Agricultural Update

No. 12/2026 2 April 2026

Summary of key issues

- In the week ending 1 April 2026, Ex Tropical Cyclone (TC) Narelle brought heavy rainfall to Western Australia.
  - Severe weather and flood warnings remain in place in Queensland, and parts of the Northern Territory, South Australia and New South Wales.
  - In southern cropping areas, falls are expected to support autumn pasture growth and boost soil moisture levels in the led up to winter crop planting.
- Over the 8 days to 9 April 2026, **cold fronts** are expected to bring rainfall to parts of the southeast and southwest:
  - Low rainfall totals (0-10 millimetres) are forecast for cropping regions in Queensland, New South Wales, South Australia, and Victoria.
  - Higher falls are forecast for much of Western Australia, with 10-50 millimetres forecast over the period.
- Rainfall was generally average to above average across Australia for March 2026, although below average to severely deficient rainfall was recorded in some isolated eastern areas, including parts of southeast Queensland and northern New South Wales, as well as Tasmania.
- Pasture growth for the three months to March 2026 has been mixed, with much of north-eastern and central Australia seeing robust pasture growth but below average growth was evident across large areas of eastern, northern and western Australia. Soil moisture models indicate broadly high soil moisture storage with exceptions in isolated eastern and western areas.
- Water storage levels in the Murray-Darling Basin (MDB) decreased by 69 gigalitres (GL) between 26 March 2026 and 1 April 2026. The current volume of water held in storages is 10,472 GL, equivalent to 47% of total storage capacity. This is 14% or 1,688 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 $421/ML on 26 March 2026 to $399/ML on 2 April 2026. 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

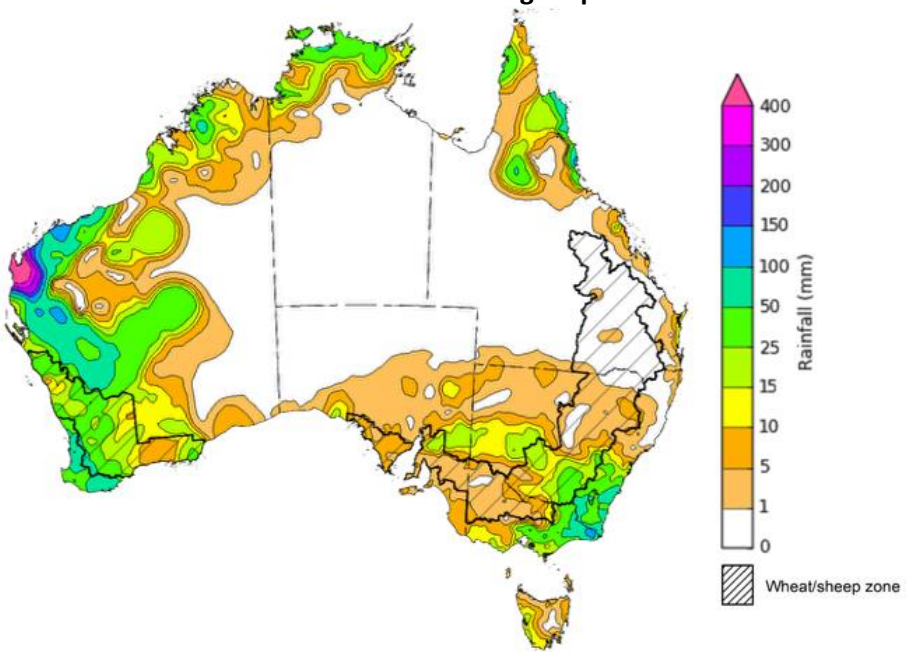
In the week ending 1 April 2026, Ex Tropical Cyclone (TC) Narelle brought heavy rainfall to parts of Western Australia, while a low-pressure system brought falls to parts of the southeast. Central and eastern regions remained largely dry.

- In Western Australia, 50-400 millimetres of rainfall was recorded across much of the western coast and some inland regions. Severe weather warnings are in place in isolated areas.
- Many northern regions continue to experience rainfall, with the northern tropics observing falls of 10-50 millimetres.
    - Severe weather and flood warnings remain in place in Queensland, and well as parts of the Northern Territory, South Australia and New South Wales.
- Eastern Victoria and southern New South Wales saw 25-100 millimetres of rainfall over the period, with isolated areas up to 150 millimetres.
- Much of southern and central Queensland, South Australia, northern New South Wales, eastern Tasmania, and the remainder of the Northern Territory remained largely dry.

Across cropping regions, rainfall was mixed, with limited rainfall in the east and considerable falls in the west and parts of the southeast.

- Most cropping regions of South Australia, Victoria, northern New South Wales, and Queensland saw little to no rainfall.
    - These mainly dry conditions across Queensland and northern New South Wales are expected to support the harvest of late summer crops.
- In contrast, falls of 10-50 millimetres were recorded across much of Western Australia and southern New South Wales.
    - These falls are expected to support autumn pasture growth and boost soil moisture levels in the lead up to winter crop planting.

Rainfall for the week ending 1 April 2026



©Commonwealth of Australia 2026, Australian Bureau of Meteorology Issued: 1/4/2026
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

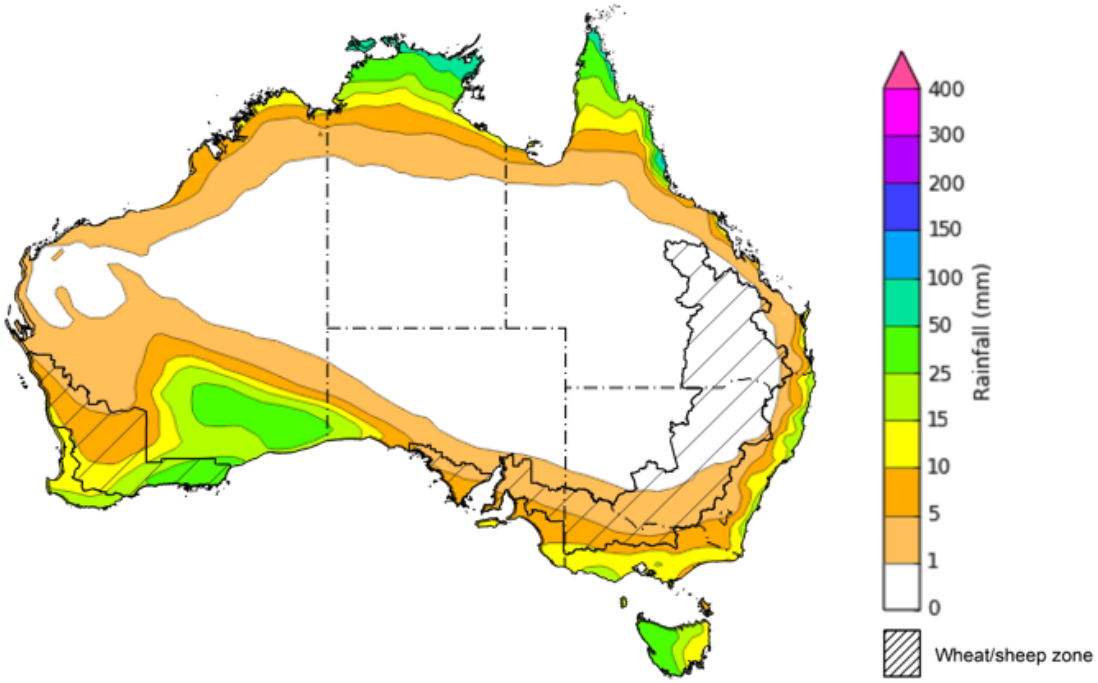
Over the 8 days to 9 April 2026, **cold fronts** are expected to bring rainfall to parts of the southeast and southwest, while low-pressure systems are expected the bring rainfall the far north.

- Falls of between 5-50 millimetres are forecast for parts of the northern tropics, including the far north of the Northern Territory and Cape York Peninsula. Similar rainfall totals are expected for much of southern Western Australia and Tasmania.
- In the east, falls of 5-25 millimetres are expected in eastern coastal regions of New South Wales and southern Victoria, while remaining eastern areas are expected to see lower falls of between 5-10 millimetres.
- Remaining central and southern areas are likely to see little to no rainfall.

Rainfall totals across many cropping regions over the coming week are forecast to be low, with exceptions in parts of the west:

- Low rainfall totals (0-10 millimetres) are forecast for Queensland, New South Wales, South Australia, and Victoria.
- Higher falls are forecast for much of Western Australia, with 10-50 millimetres forecast over the period.
    - These falls are likely to contribute to a build-up of soil moisture ahead of the planting of 2026–27 winter crops and benefit the growth of pastures.

Total forecast rainfall for the period 2 April to 9 April 2026



©Commonwealth of Australia 2026, Australian Bureau of Meteorology Issued 2/4/2026
Note: This rainfall forecast is produced from computer models. As the model outputs are not altered by weather forecasters, it is important to check local forecasts and warnings issued by the Bureau of Meteorology.

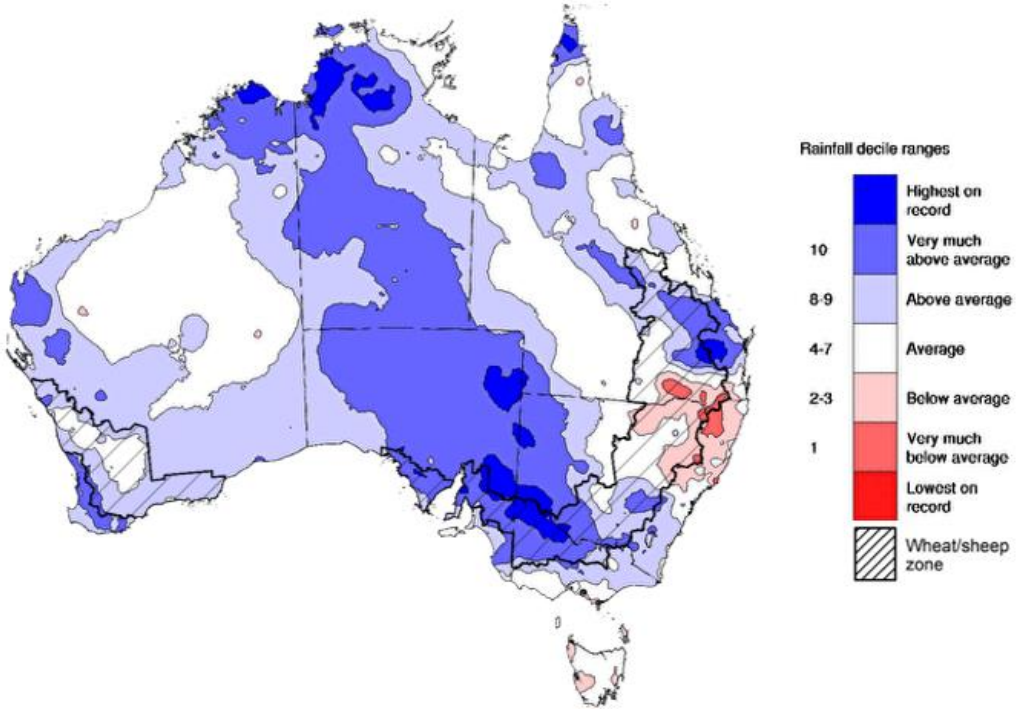
1.3. Monthly rainfall

- Rainfall during March 2026 was generally above average across Australia.
    - Numerous low-pressure systems and Tropical Cyclone (TC) Narelle contributed to widespread flooding across the Northern Territory, northern Queensland and Western Australia and South Australia with some areas seeing highest on record rainfall.
    - In the south, low-pressure systems and cold fronts have supported rainfall outcomes in southern New South Wales, much of Victoria and South Australia, and Western Australia, with these areas seeing average to very much above average rainfall.
    - While this heavy rainfall has led to supply chain disruptions and lead to some short-term hardship for some producers, these falls are likely to provide significant longer-term benefits to pasture production and soil moisture levels.
- Below average to severely deficient rainfall was recorded in some isolated eastern areas, including parts of southeast Queensland and northern New South Wales, as well as Tasmania.

In cropping regions, March rainfall was generally average to extremely high, with some below average falls in the east:

- March rainfall was below average to very much below average in parts of northern New South Wales and southern Queensland. Southern cropping regions, including Victoria, South Australia, and much of Western Australia, saw average to extremely high rainfall for the period.
    - This above average rainfall outcome is likely to have supported pasture growth and soil moisture storage ahead of the winter cropping season.

Rainfall deciles for March 2026



Note: Rainfall for March 2026 is compared with rainfall recorded for that period during the historical record (1900 to present). For further information, go to http://www.bom.gov.au/climate/austmaps/about-rain-maps.shtml
Source: Bureau of Meteorology

1.4. Monthly Soil Moisture

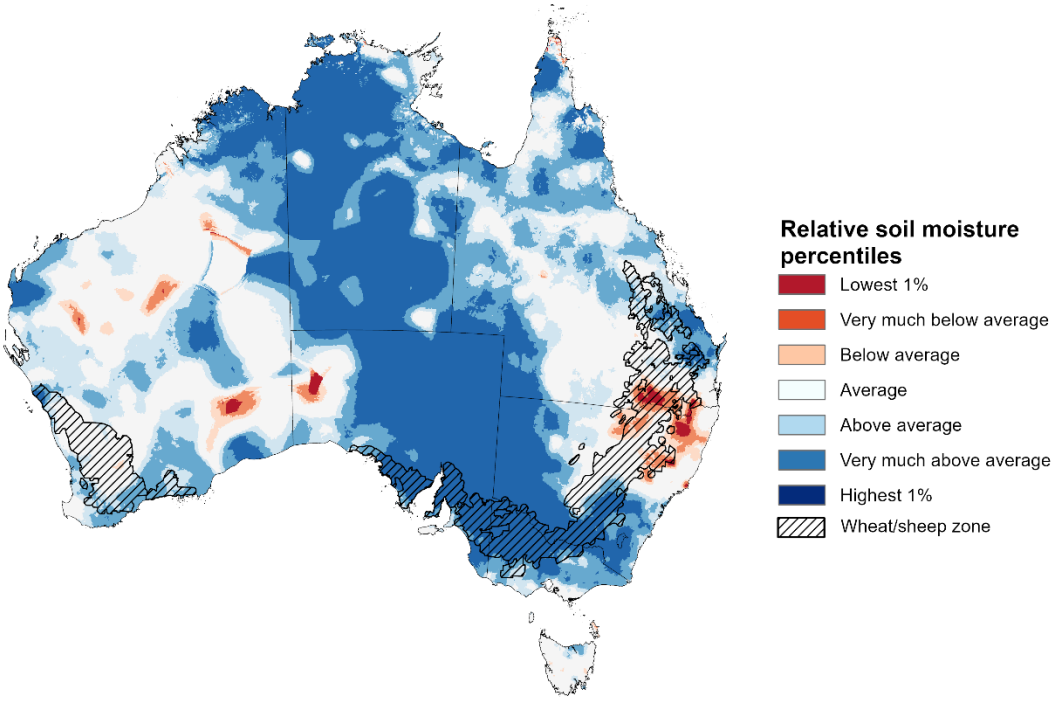
In March 2026, modelled **upper layer soil moisture** was generally average to above average in the northern, central, and southern parts of the country, with scattered areas of extremely low soil moisture in eastern and western regions.

- Parts of south-eastern Queensland, north-eastern New South Wales, and central and southern Western Australia saw very much below average to below average upper layer soil moisture.
- In contrast, much of central, southern, and northern Australia, including the northern tropics, South Australia, Victoria and remaining areas in Queensland, New South Wales, and Western Australia saw average to very much above upper layer soil moisture.

At this time of year, upper layer soil moisture is important for preparation for winter cropping in southern states, and for pasture growth across northern Australia since plant growth utilises this moisture. It is also an important indicator of the ability to access paddocks for winter crop planting activities.

Across cropping regions, modelled upper layer soil moisture in March for north-eastern cropping regions was generally **average to below average**, while southern cropping regions saw average to very much above average upper layer soil moisture.

Modelled upper layer soil moisture for March 2026



Note: This map shows the levels of modelled upper layer soil moisture (0 to 10 centimetres) during March 2026 This map shows how modelled soil conditions during March 2026 compare with March conditions modelled over the reference period (1911 to 2016). Dark blue areas on the maps were much wetter in March 2026 than during the reference period. The bulk of plant roots occur in the top 20 centimetres of the soil profile. Soil moisture in the upper layer of the soil profile is therefore useful indicator of the availability of water, particularly for germinating seed.
Source: Bureau of Meteorology (https://awo.bom.gov.au/about/overview)

Modelled **lower layer soil moisture** in March 2026 was average to very much above average across much of Australia, while extremely low to below average modelled lower layer soil moisture was evident across some eastern and western areas.

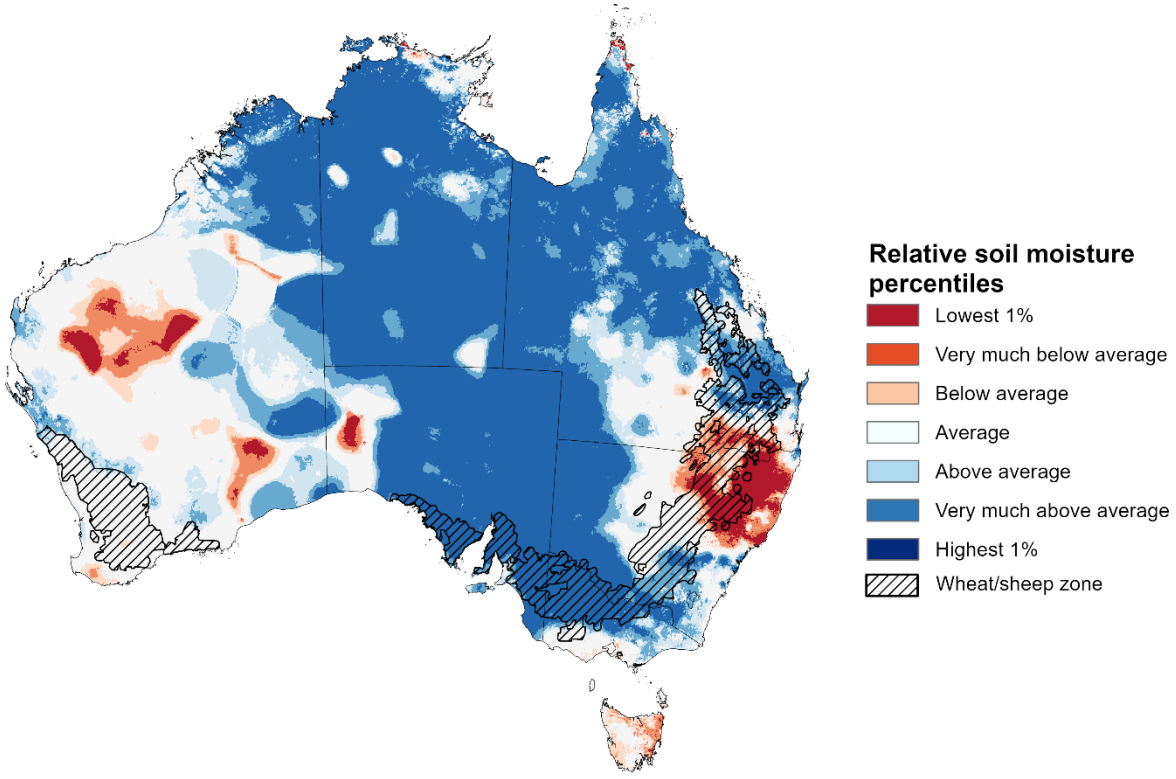
- Parts of south-eastern Queensland, north-eastern New South Wales, Tasmania, and central Western Australia were modelled as having **very much below average to below average soil moisture.** By contrast, much of the northern tropics, South Australia, western Queensland and New South Wales were modelled as having **above average to very much above average soil moisture over the period.**

At this time of year increased levels of lower layer soil moisture will be important to support establishment on winter crops and pasture growth during a peak growth period.

Most cropping regions in southern Queensland and northern New South Wales were modelled as having **average to very much below average soil moisture**, with some areas of northern Queensland seeing above average soil moisture. In contrast, southern New South Wales, Victoria, and South Australia recorded **average to very much above average soil moisture** for this time of year. Western Australian cropping regions were modelled as having broadly average soil moisture storage.

In areas with **average to above average lower layer soil moisture,** this is likely to **provide a reserve of plant-available water for early winter crops**. Agricultural regions across southern Australia have seen a significant improvement in soil moisture levels since the end of January 2026. This is likely to assist in arresting declining levels of pasture availability and provide a boost to soil moisture reserves ahead of planting of the 2026–27 winter crop.

Modelled lower layer soil moisture for March 2026



Note:. This map shows how modelled soil conditions during March 2026 compare with March conditions modelled over the reference period (1911 to 2016). Dark blue areas on the maps were much wetter in March 2026 than during the reference period. The dark red areas were much drier than during the reference period. The bulk of plant roots occur in the top 20 centimetres of the soil profile. The lower layer soil moisture is a larger, deeper store that is slower to respond to rainfall and tends to reflect accumulated rainfall events over longer time periods.
Source: Bureau of Meteorology (https://awo.bom.gov.au/about/overview)

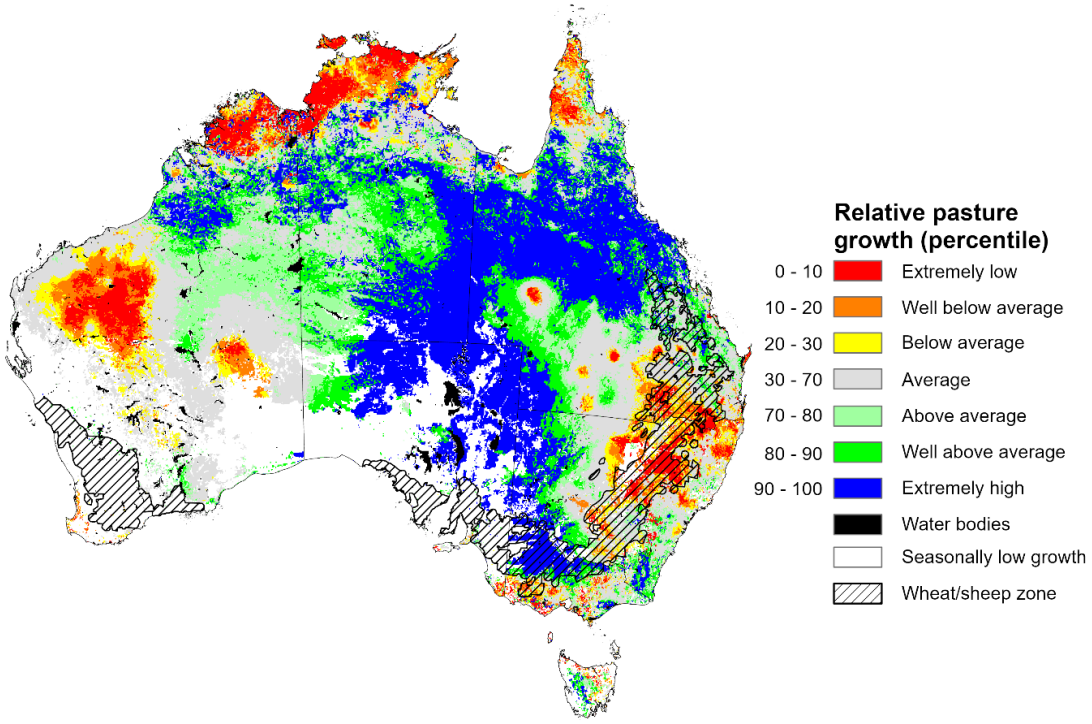
1.5. Pasture Growth

The January to March period is an important part of the growth period for northern Australia which typically provides the bulk of feed to maintain production through the low pasture growth months of the northern dry season. Across southern Australia, January to March pasture growth is typically low reflecting lower rainfall totals, high temperature and high evapotranspiration rates at this time of year. Pasture availability during this period influences the growth and branding and marking rates of lambs and calves, livestock turnoff and the production of meat, milk, and wool.

Pasture growth for the three months to March 2026 was variable across much of country.

- **Average to extremely high** relative pasture growth was modelled across large areas of northern and central Australia – with exceptions in the far-north Northern Tropics – as well as isolated south-eastern regions, including northern Victoria, northern South Australia, western New South Wales and western Tasmania.
    - This pasture growth is expected to have allowed some farmers to maintain livestock numbers, provide opportunities to build standing dry matter availability and replenish fodder supplies during late spring and early summer period.
- In contrast, large areas of the eastern and western Australia, including parts of southern Queensland, north-eastern New South Wales, southern Victoria, the northern tropics, and central Western Australia saw **relatively low pasture growth** for this time of year.
    - This below average pasture growth has likely led to a decline in pasture availability and graziers in regions where below average pasture growth was recorded will be more reliant on supplemental feed to maintain current stocking rates and production, with others choosing to destock to take advantage of current high saleyard prices.

Relative pasture growth for 3-months ending February 2026 (1 January to 31 March 2026)

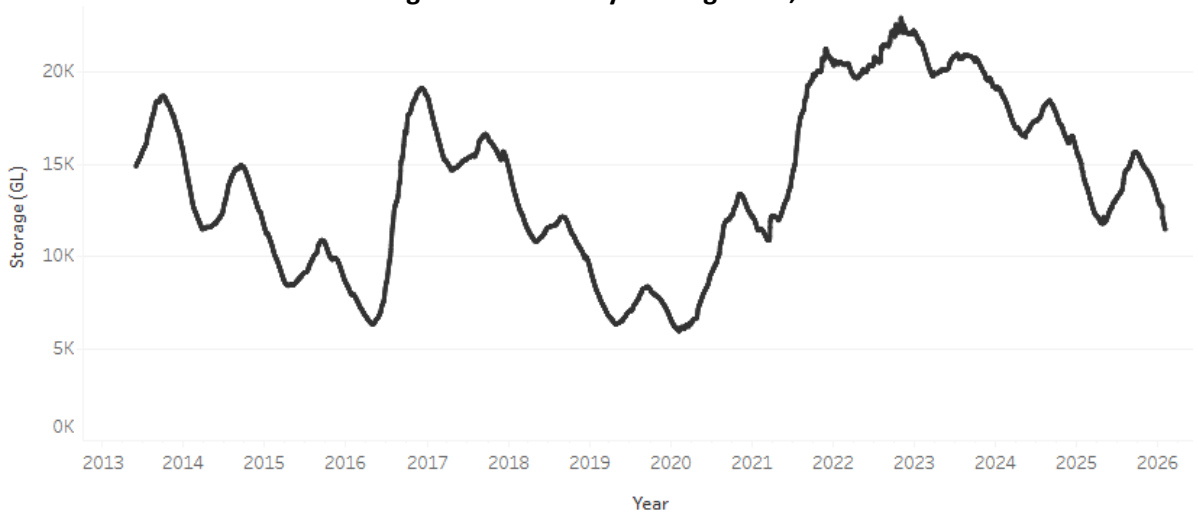


Notes: AussieGRASS pasture growth estimates are relative to the long-term record and shown in percentiles. Percentiles rank data on a scale of zero to 100. This analysis ranks pasture growth for the selected period against average pasture growth for the long-term record (1957 to 2016). Pasture growth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

1.6. Water markets – current week

Water storage levels in the Murray-Darling Basin (MDB) decreased by 69 gigalitres (GL) between 26 March 2026 and 1 April 2026. The current volume of water held in storages is 10,472 GL, equivalent to 47% of total storage capacity. This is 14% or 1,688 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, 2013–2026



Allocation prices in the Victorian Murray below the Barmah Choke decreased from $421/ML on 26 March 2026 to $399/ML on 2 April 2026. 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.

Water market prices, Southern Murray–Darling Basin

Region	$/ML
NSW Murray Above	290
NSW Murrumbidgee	431
Vic Greater Goulburn	332
Vic Murray Below	399

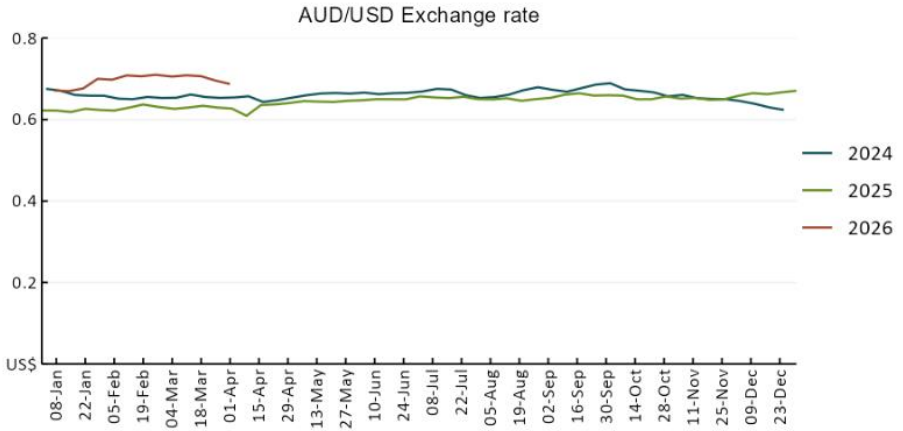
Note: The water allocation prices shown are volume weighted average prices based on the last 10 trades. Price data is sourced from Waterflow and current as at 22 January 2026.

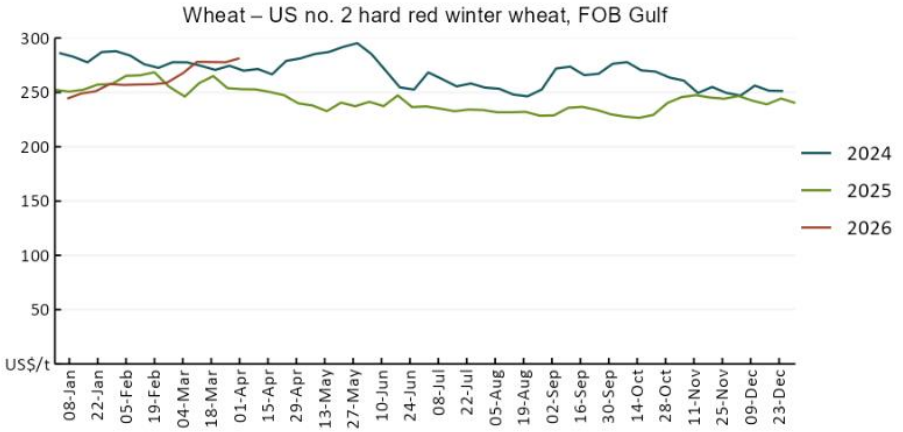
To access the full, interactive, weekly water dashboard, which contains the latest and historical water storage, water market and water allocation information, please visit https://www.agriculture.gov.au/abares/products/weekly_update/weekly-update-260402

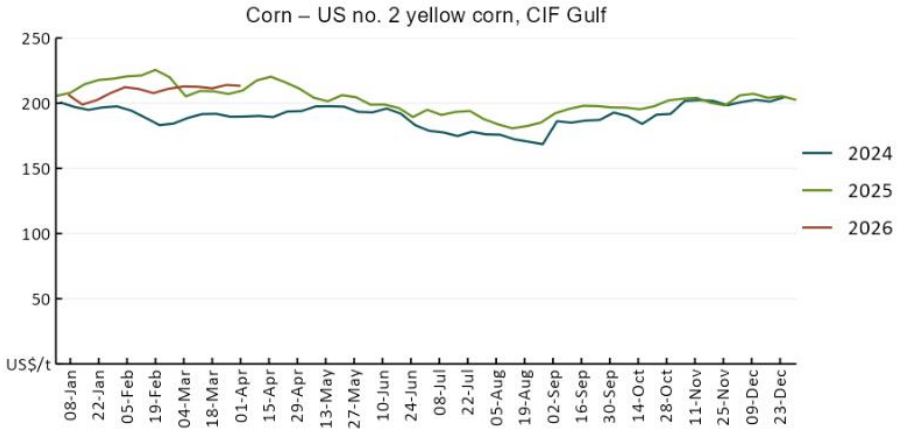
2. Commodities

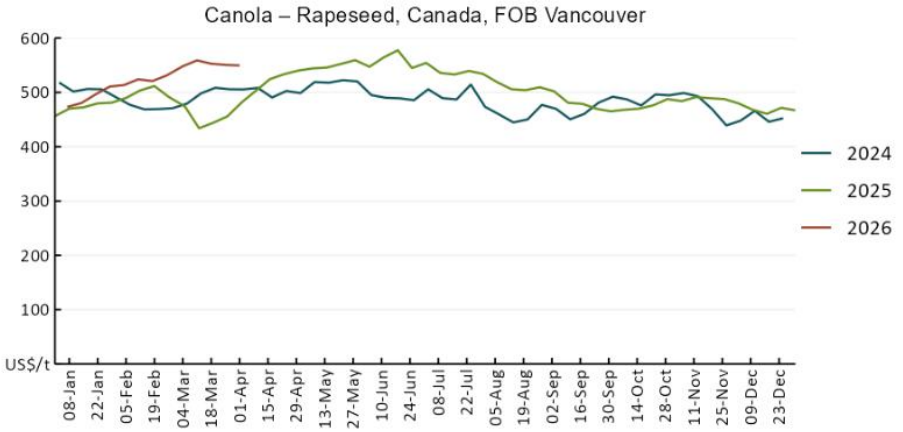
Indicator	Week average	Unit	Latest Price	Previous Week	Weekly change	Price 12 months ago	Annual change
Selected world indicator prices							
AUD/USD Exchange rate	1-Apr	A$/US$	0.69	0.70	-1%	0.63	9%
Wheat – US no. 2 hard red winter wheat, FOB Gulf	1-Apr	US$/t	281	278	1%	249	13%
Corn – US no. 2 yellow corn, FOB Gulf	1-Apr	US$/t	213	214	0%	215	-1%
Canola – Rapeseed, Canada, FOB Vancouver	1-Apr	US$/t	550	551	0%	517	6%
Cotton – Cotlook A Index	1-Apr	USc/lb	80.6	78.6	3%	78.1	3%
Sugar – Intercontinental Exchange, nearby futures, no.11 contract	1-Apr	USc/lb	15.6	15.7	-1%	18.1	-14%
Wool – Eastern Market Indicator	1-Apr	Ac/kg clean	1,786	1,724	4%	1,238	44%
Wool – Western Market Indicator	1-Apr	Ac/kg clean	2,007	1,893	6%	1,394	44%
Selected Australian grain export prices							
Australian Premium White (APW) Wheat, FOB Port Adelaide, SA	1-Apr	A$/t	376	373	1%	399	-6%
Australian Standard White (ASW) Wheat, FOB Port Adelaide, SA	1-Apr	A$/t	373	370	1%	393	-5%
Feed Barley – FOB Port Adelaide, SA	1-Apr	A$/t	366	363	1%	372	-2%
Canola – FOB Kwinana, WA	1-Apr	A$/t	757	736	3%	795	-5%
Grain Sorghum – FOB Brisbane, QLD	1-Apr	A$/t	446	447	0%	438	2%
Selected domestic livestock indicator prices							
Beef – Eastern Young Cattle Indicator	1-Apr	Ac/kg cwt	847	867	-2%	700	21%
Mutton – Mutton indicator (18–24 kg fat score 2–3), VIC	1-Apr	Ac/kg cwt	801	797	1%	506	58%
Lamb – National Trade Lamb Indicator	1-Apr	Ac/kg cwt	1,181	1,165	1%	812	45%
Pig – Eastern Seaboard (60.1–75 kg), NSW buyer price	18-Mar	Ac/kg cwt	465	467	0%	448	4%
Live cattle – Light steers to Indonesia	25-Feb	Ac/kg lwt	480	480	0%	358	34%
Global Dairy Trade (GDT) weighted average prices							
Dairy – Whole milk powder	18-Mar	US$/t	3,709	3,863	-4%	4,117	-10%
Dairy – Skim milk powder	18-Mar	US$/t	3,409	3,243	5%	2,836	20%
Dairy – Cheddar cheese	18-Mar	US$/t	4,925	4,920	0%	4,971	-1%
Dairy – Anhydrous milk fat	18-Mar	US$/t	7,602	7,147	6%	6,772	12%

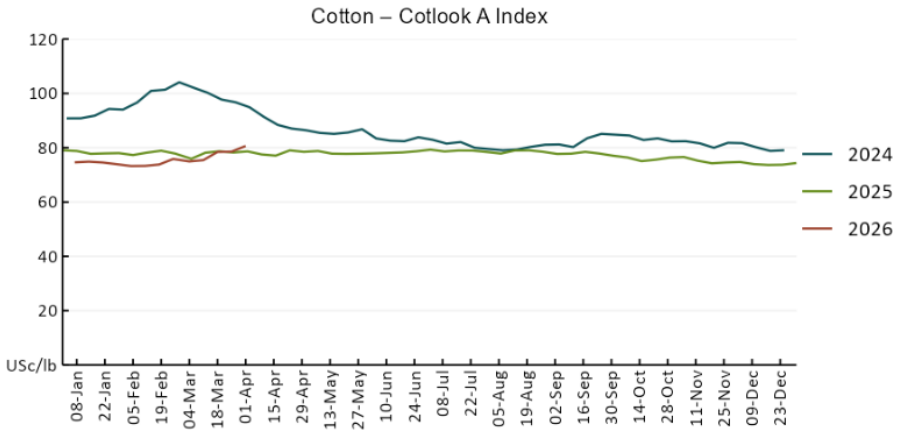
2.1. Selected world indicator prices

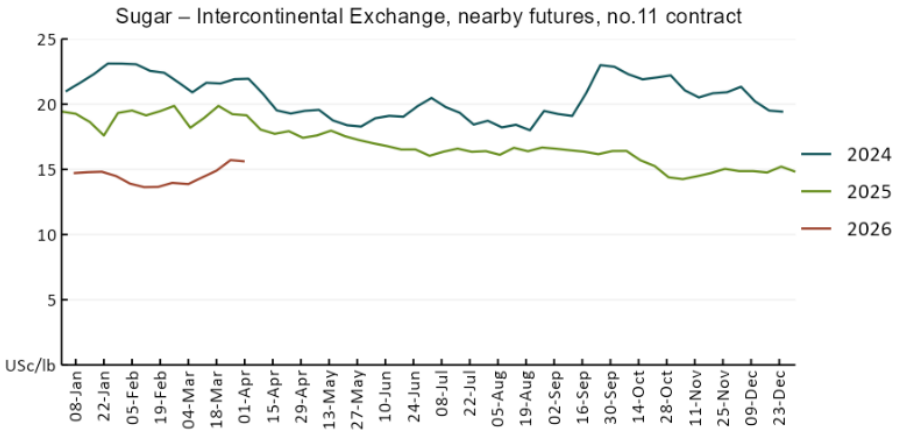









Cotton – Cotlook A Index
120
100
80
60
40
20
USc/lb
08-Jan
22-Jan
05-Feb
19-Feb
04-Mar
18-Mar
01-Apr
15-Apr
29-Apr
13-May
27-May
10-Jun
24-Jun
08-Jul
22-Jul
05-Aug
19-Aug
02-Sep
16-Sep
30-Sep
14-Oct
28-Oct
11-Nov
25-Nov
09-Dec
23-Dec
2024
2025
2026


Sugar – Intercontinental Exchange, nearby futures, no.11 contract
25
20
15
10
5
USc/lb
08-Jan
22-Jan
05-Feb
19-Feb
04-Mar
18-Mar
01-Apr
15-Apr
29-Apr
13-May
27-May
10-Jun
24-Jun
08-Jul
22-Jul
05-Aug
19-Aug
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09-Dec
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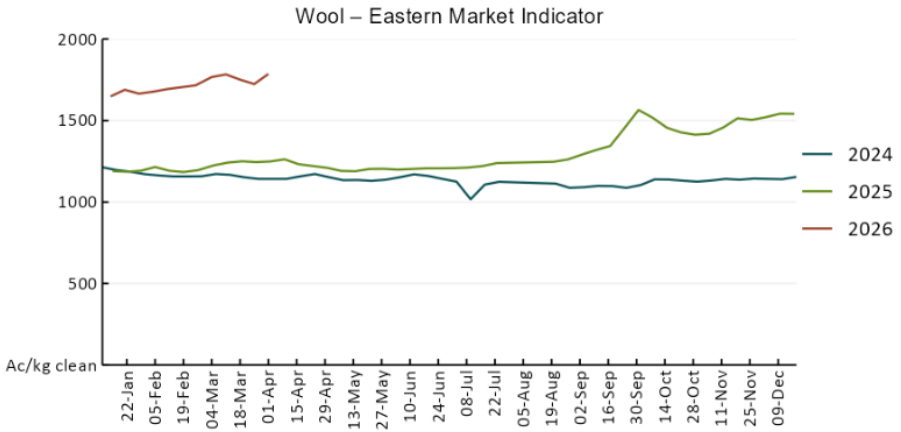
2024
2025
2026


Wool – Eastern Market Indicator
2000
1500
1000
500
Ac/kg clean
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
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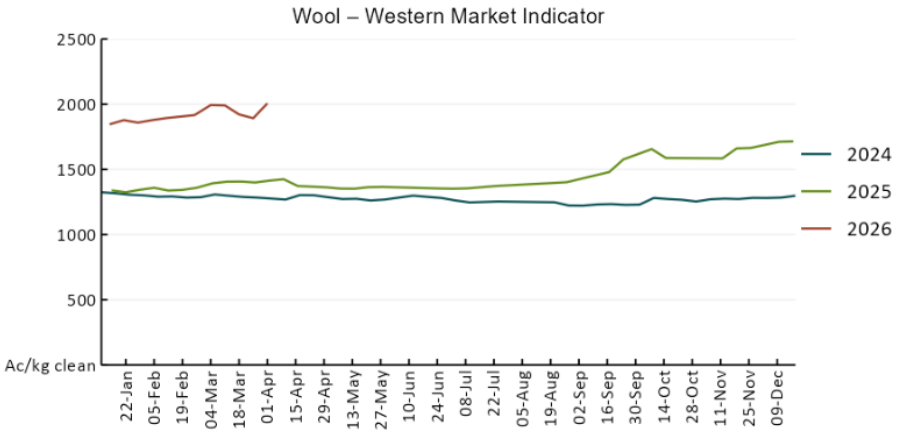
Wool – Western Market Indicator
2500
2000
1500
1000
500
Ac/kg clean
22-Jan
05-Feb
19-Feb
04-Mar
18-Mar
01-Apr
15-Apr
29-Apr
13-May
27-May
10-Jun
24-Jun
08-Jul
22-Jul
05-Aug
19-Aug
02-Sep
16-Sep
30-Sep
14-Oct
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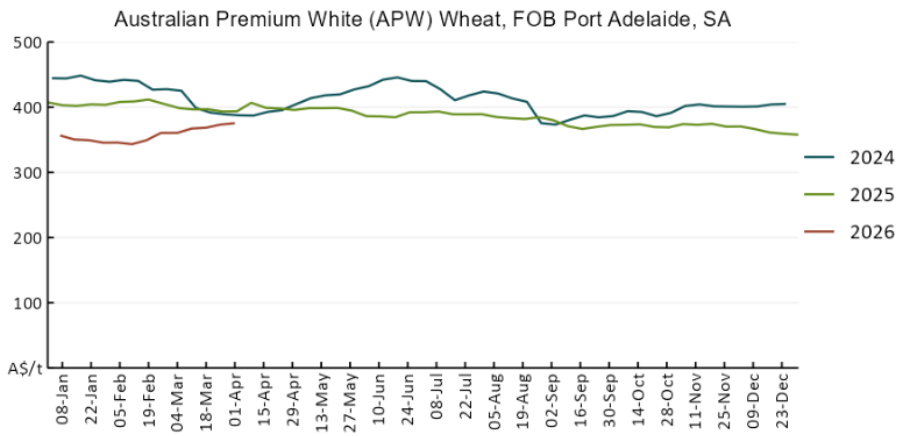
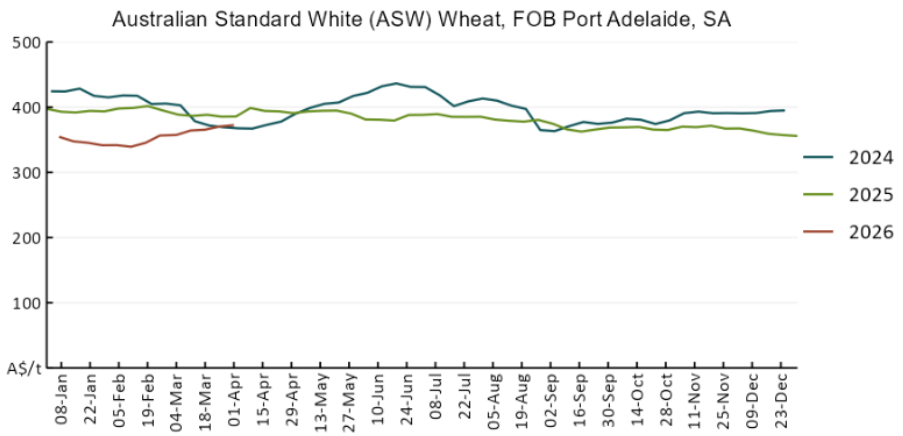
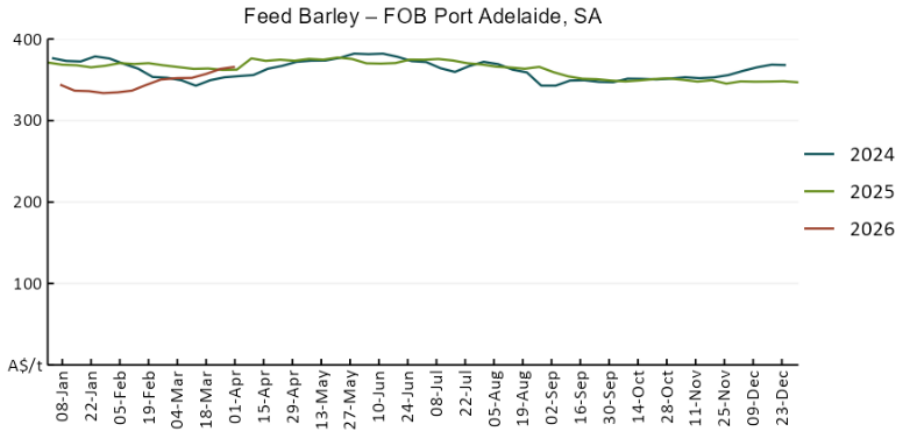
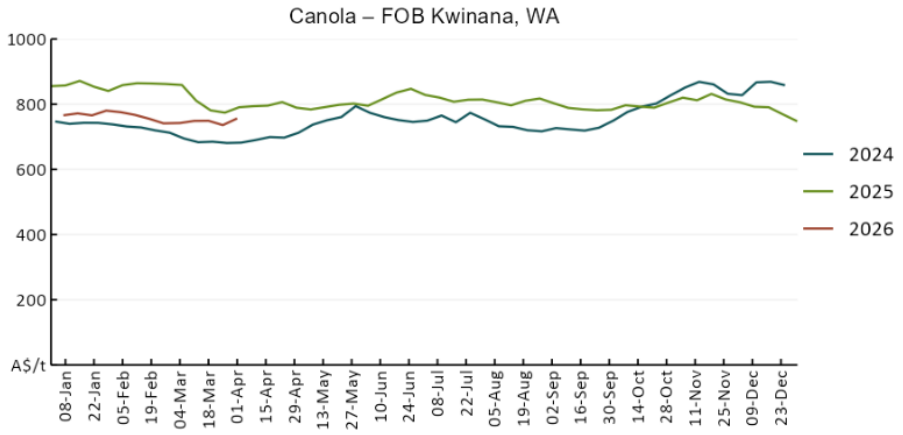
11-Nov
25-Nov
09-Dec
2024
2025
2026

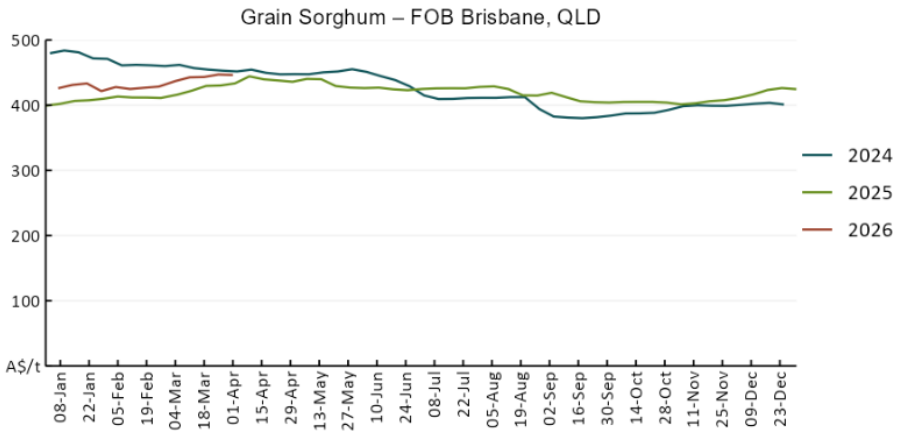
3.2 Selected domestic crop indicator prices










Grain Sorghum – FOB Brisbane, QLD
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
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02-Sep
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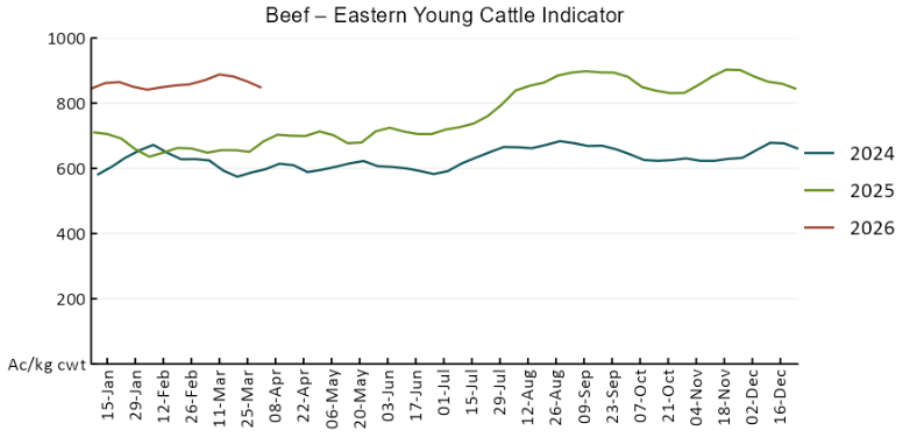
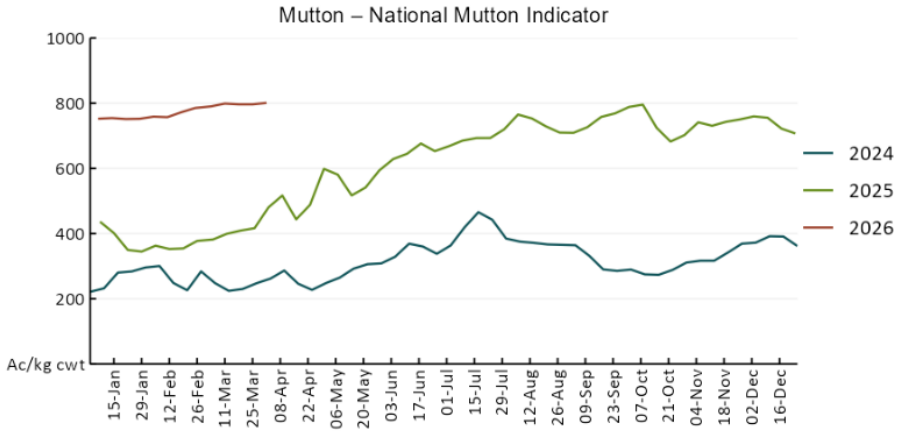
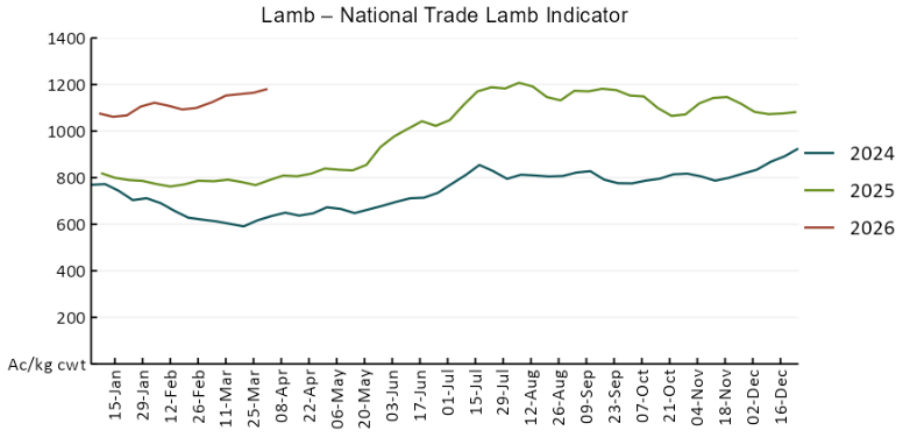
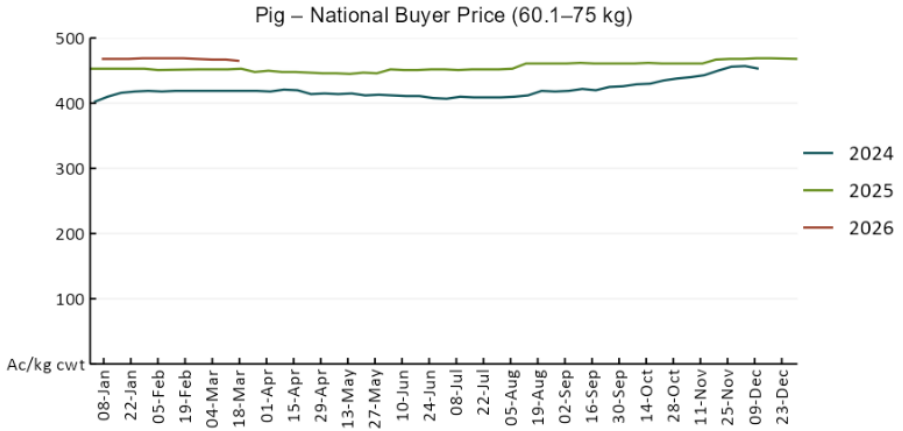
2026

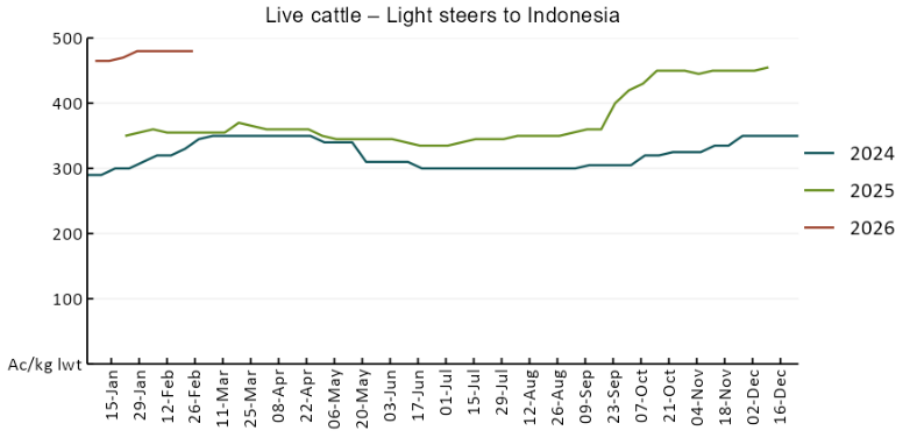
3.3 Selected domestic livestock indicator prices



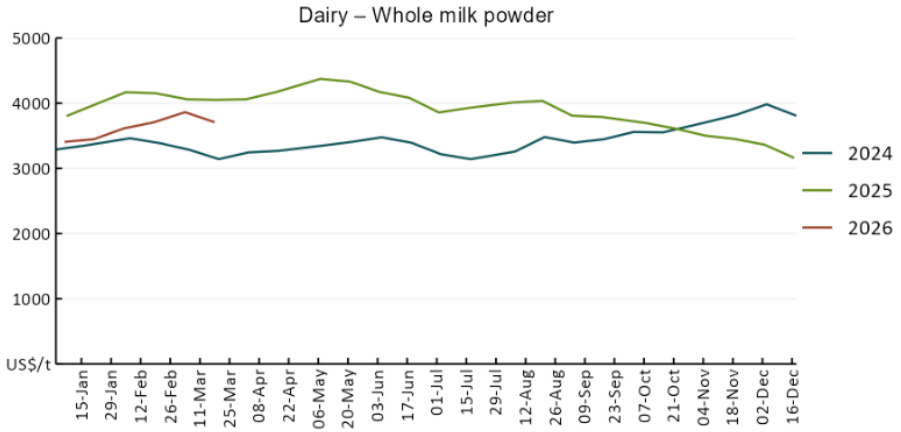


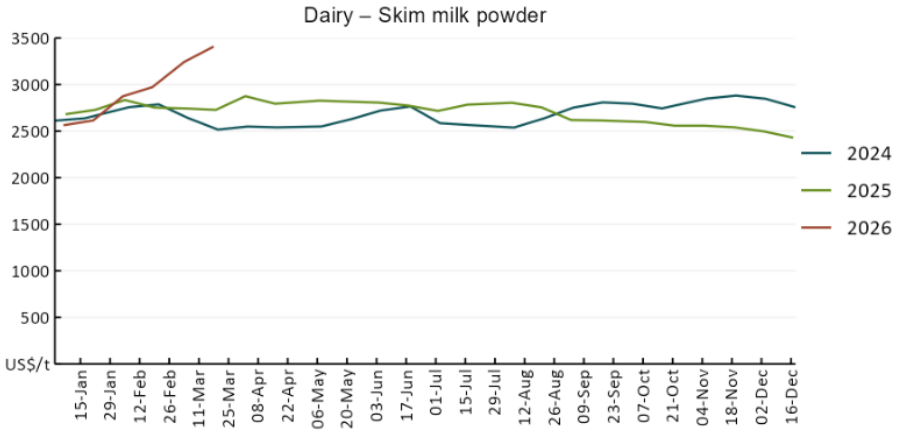


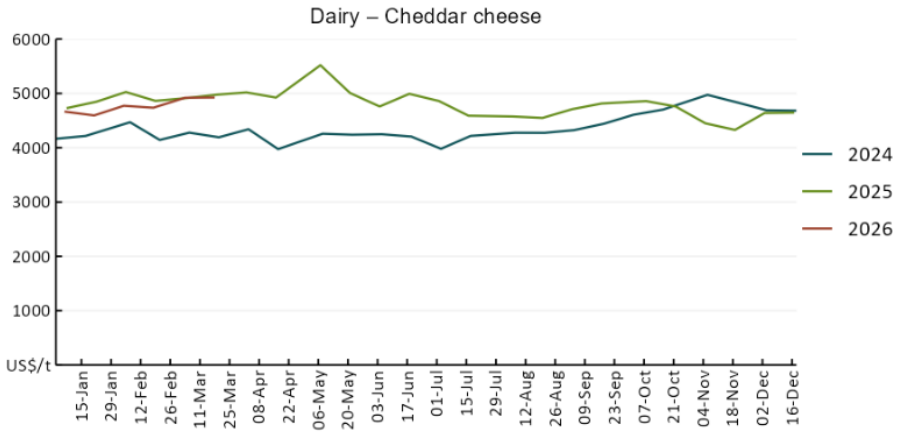


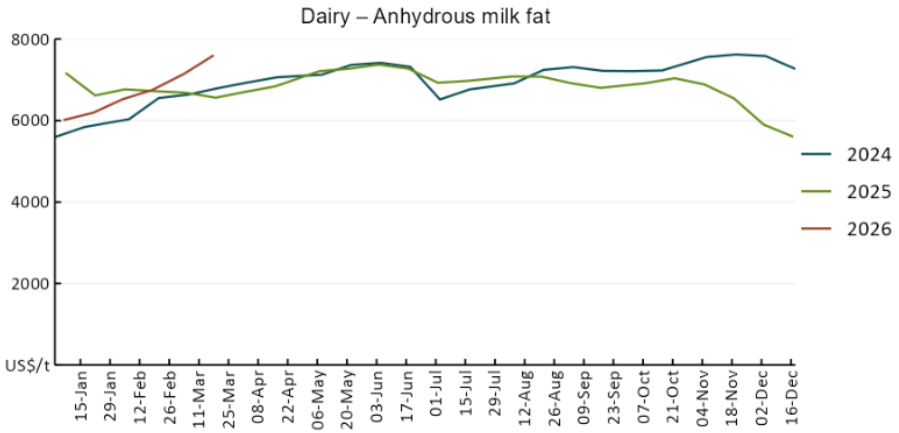

Live cattle – Light steers to Indonesia
500
400
300
200
100
Ac/kg lwt
15-Jan
29-Jan
12-Feb
26-Feb
11-Mar
25-Mar
08-Apr
22-Apr
06-May
20-May
03-Jun
17-Jun
01-Jul
15-Jul
29-Jul
12-Aug
26-Aug
09-Sep
23-Sep
07-Oct
21-Oct
04-Nov
18-Nov
02-Dec
16-Dec
2024
2025
2026

3.4 Global Dairy Trade (GDT) weighted average prices

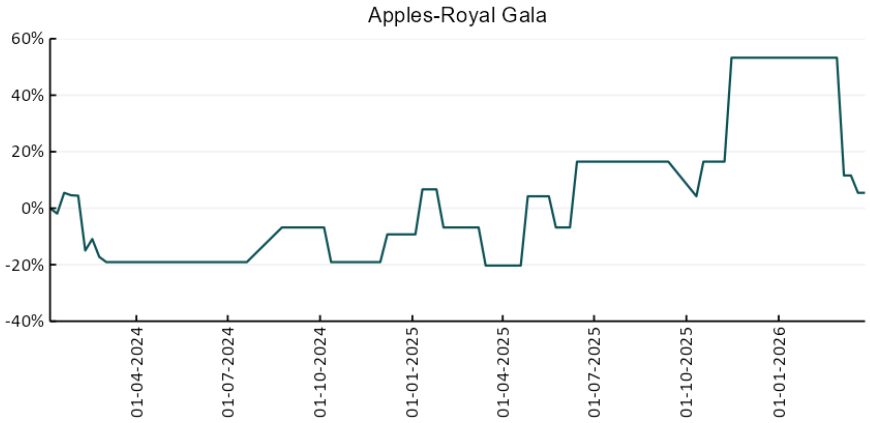


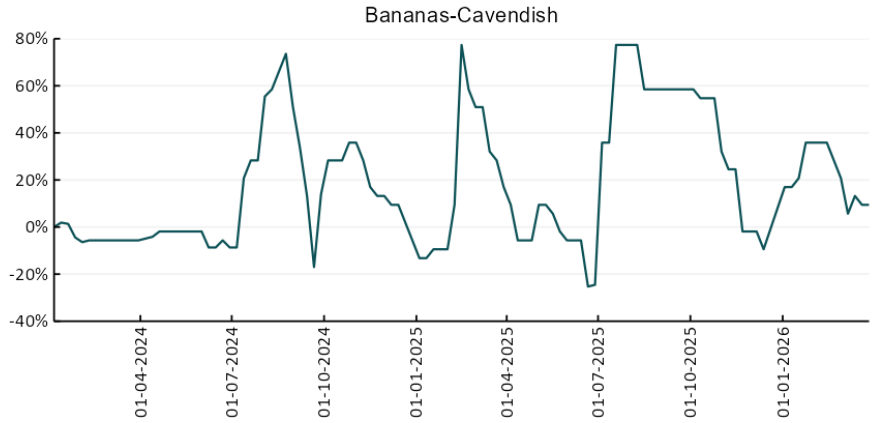


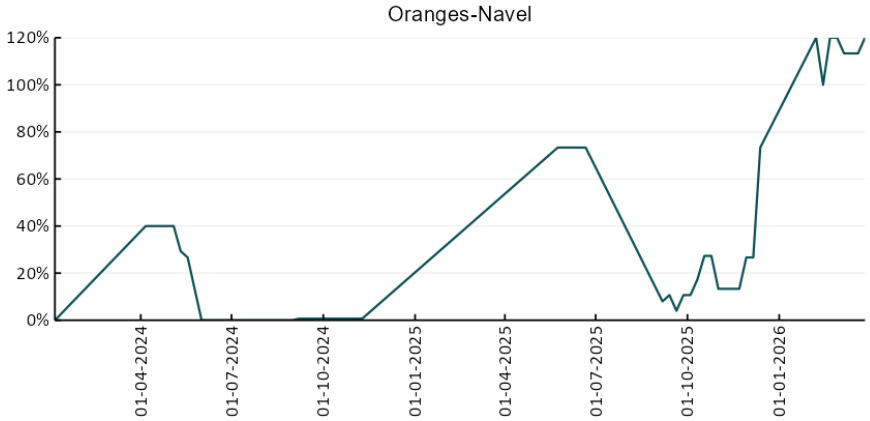


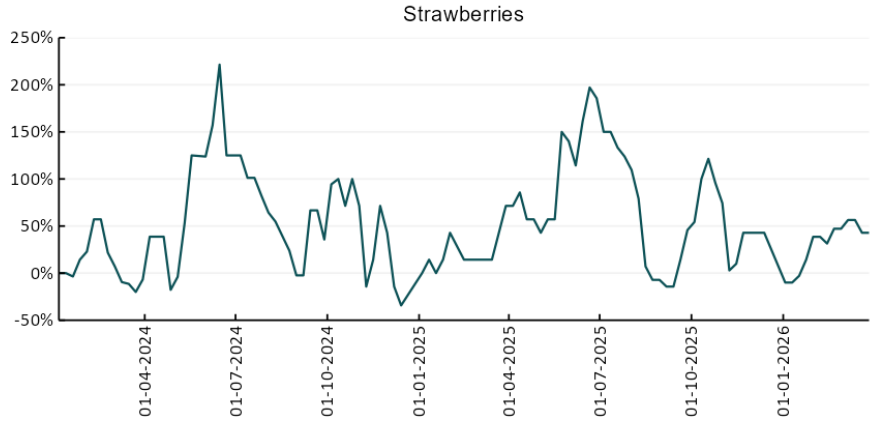


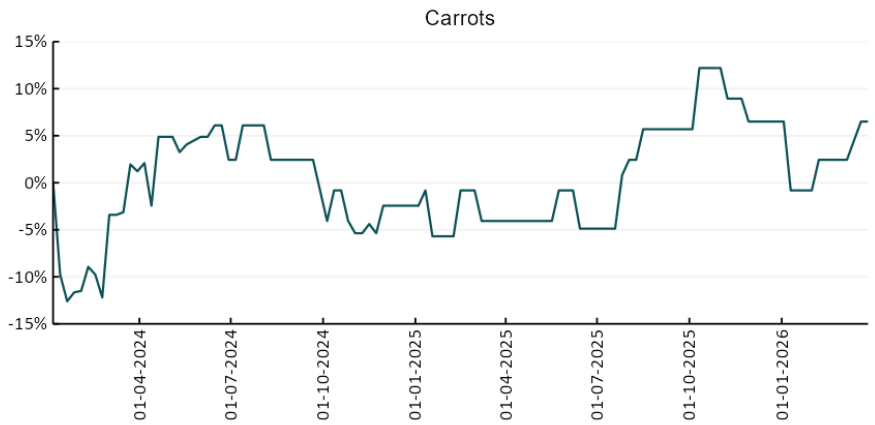
3.5 Selected fruit and vegetable prices

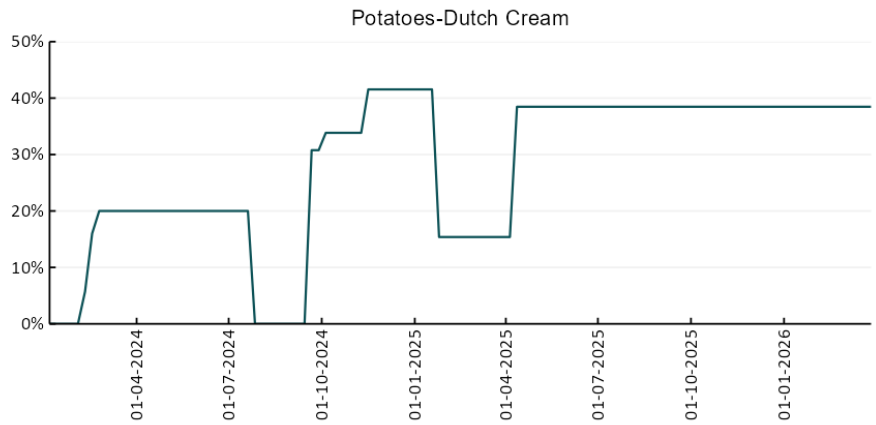


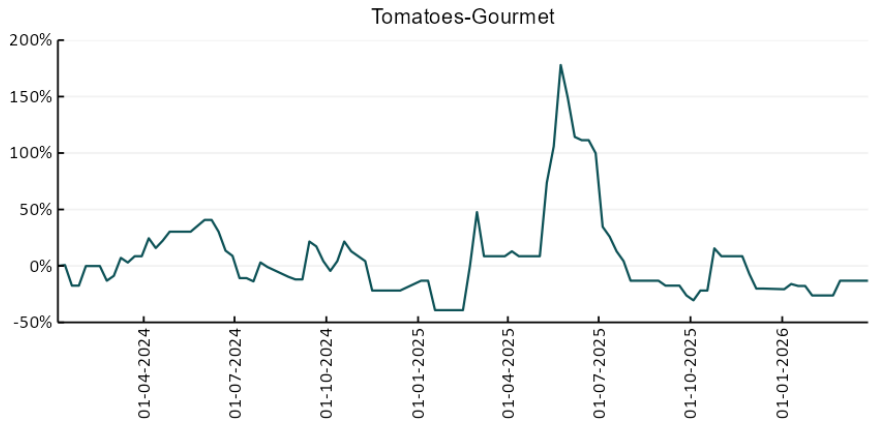


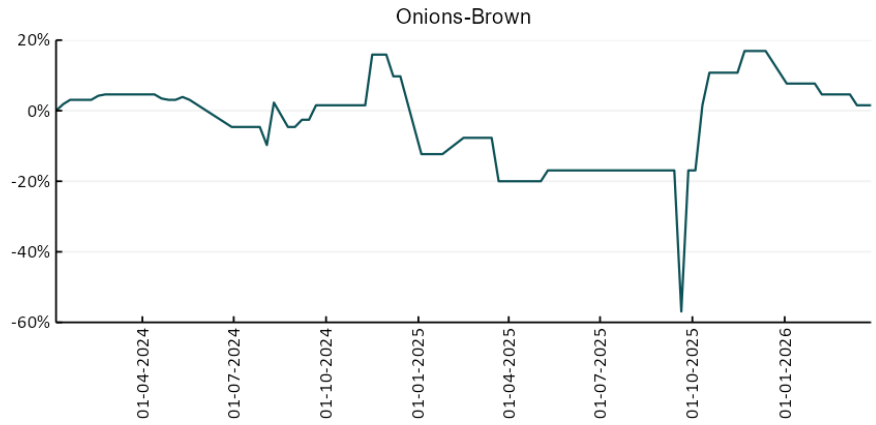




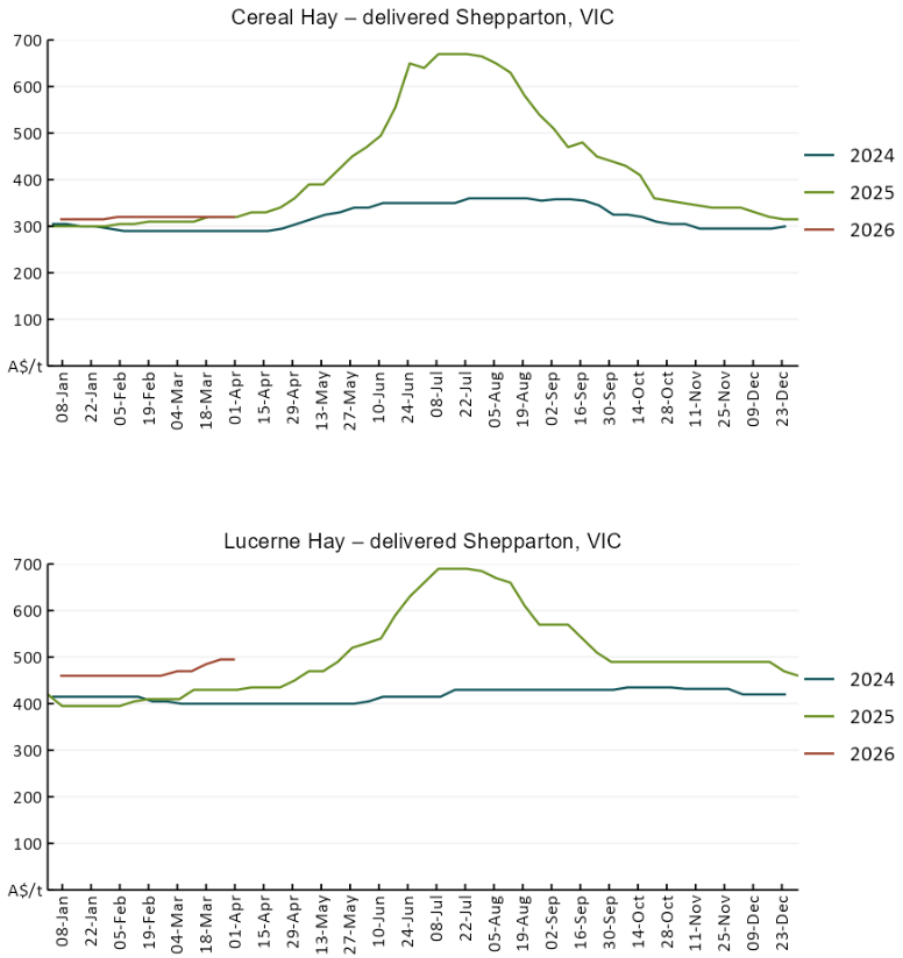

Carrots
15%
10%
5%
0%
-5%
-10%
-15%
01-04-2024
01-07-2024
01-10-2024
01-01-2025
01-04-2025
01-07-2025
01-10-2025
01-01-2026

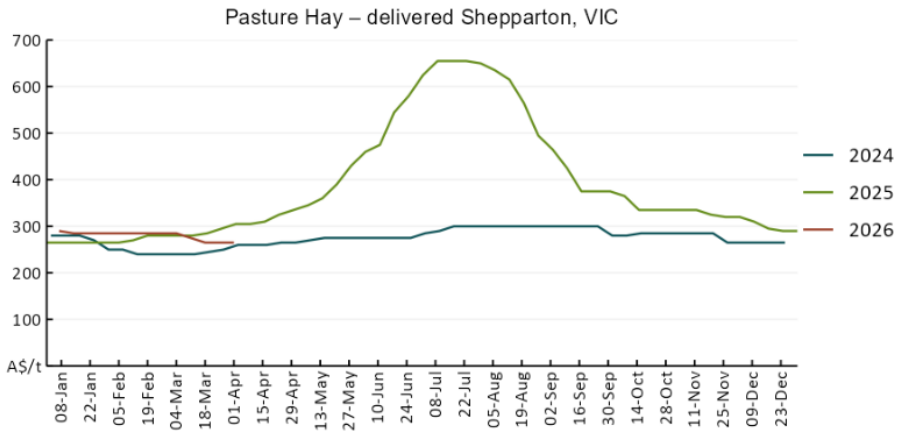

Potatoes-Dutch Cream
50%
40%
30%
20%
10%
0%
01-04-2024
01-07-2024
01-10-2024
01-01-2025
01-04-2025
01-07-2025
01-10-2025
01-01-2026


Tomatoes-Gourmet
200%
150%
100%
50%
0%
-50%
01-04-2024
01-07-2024
01-10-2024
01-01-2025
01-04-2025
01-07-2025
01-10-2025
01-01-2026


Onions-Brown
20%
0%
-20%
-40%
-60%
01-04-2024
01-07-2024
01-10-2024
01-01-2025
01-04-2025
01-07-2025
01-10-2025
01-01-2026

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: https://www.bom.gov.au/climate/ahead/outlooks/#moreMaps
- 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: https://awo.bom.gov.au/products/historical/soilMoisture-rootZone/

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
- https://www.igc.int/en/default.aspx
- 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: Jumbuk AG | Agriculture Consulting

Cattle, beef, mutton, lamb, goat and live export

- Meat and Livestock Australia: https://www.mla.com.au/prices-markets/

Australian Agricultural Drought Indicators

About Australian Agricultural Drought Indicators

The Australian Agricultural Drought Indicators (AADI) links weather and agricultural data with a range of scientific and economic models to measure and forecast the effects of climate variability and drought on agricultural outcomes.

On AADI, projected broadacre farm profits are presented as percentile outcomes relative to simulated historical outcomes using the groupings:

Highest	95-100th percentile
Very much above average	85-95th percentile
Above average	65-85th percentile
Average	35-65th percentile
Below average	15-35th percentile
Very much below average	5-15th percentile
Lowest 5%	0-5th percentile

There are two AADI farm profit indicators:

- The AADI farm profit climate and price indicator shows the effect of climate and prices on broadacre farm business profits of current farms compared to the last 33 years.
- The AADI farm profit climate only indicator isolates the effect of climate on profits by holding prices fixed.

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