Australian Government
Department of Agriculture, Fisheries and Forestry

ABARES

Weekly Australian Climate, Water and Agricultural Update

No. 27/2026 16 July 2026

Summary of key issues

- In the week ending 15 July 2026, cold fronts and low-pressure systems brought rainfall to parts of southern and central Australia. Much of the remainder of Australia was largely dry.
    - Cropping regions in South Australia, Victoria, and southern New South Wales saw 5-25 millimetres of rainfall. These moderate falls across south-eastern growing regions will maintain high soil moisture levels which and continue to support the growth of winter crops.
    - Cropping regions of Queensland, northern New South Wales and Western Australia saw little to no rainfall over the period.
- Over the 8 days to 23 July 2026, cold fronts and low-pressure systems are expected to bring rainfall to parts of eastern and southwestern Australia
    - Across cropping regions, falls of 5-50 millimetres are forecast for Western Australia, while other regions are expected to remain largely dry.
    - If realised, these expected falls will provide a timely boost to soil moisture levels in Western Australia following are relatively dry stary to July and continue to support and growth of winter crops and pastures in western regions.
- Rainfall in June 2026 was variable across the world's major grain- and oilseed-producing regions, leading to differing crop production outcomes. Global production conditions were generally favourable for wheat, maize, soybeans, and rice. However, unfavourable conditions across parts of the United States, India, the European Union and Southeast Asis are weighing on potential global production outcomes for wheat, maize and rice.
    - Global production conditions have been slightly more favourable to those used to formulate ABARES 2026–27 forecasts of global grain supplies and world prices in the June 2026 Agricultural Commodities Report. As a result, global grain and oilseed production are likely to increase beyond the estimates in the June forecast, due to small improvements in global wheat and maize production.
- Water storage levels in the Murray-Darling Basin (MDB) increased by 400 gigalitres (GL) between 9 July 2026 and 16 July 2026. The current volume of water held in storages is 12,432 GL, equivalent to 56% of total storage capacity. This is 7% or 983 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 $426/ML on 9 July 2026 to $403/ML on 16 July 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

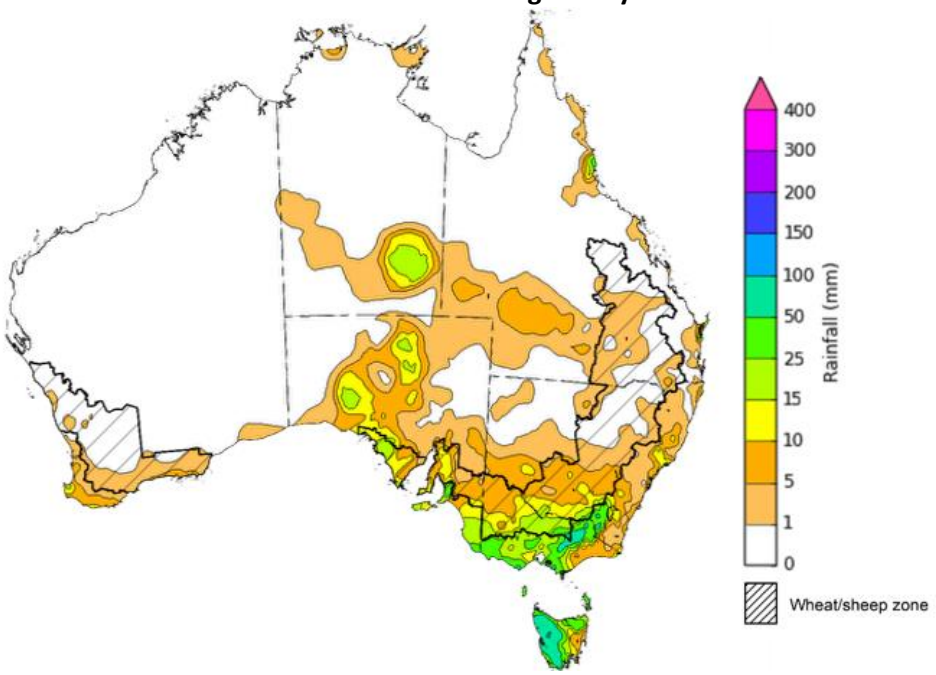
In the week ending 15 July 2026 much of Australia was largely dry, particularly across northern and western regions. Meanwhile, frontal systems brough rainfall to scattered areas of central and south-eastern Australia.

- Falls of 5-100 millimetres were recorded across Tasmania and Victoria, while lower falls of 5-25 millimetres were observed in across parts of South Australia, southern New South Wales, and southern Northern Territory.
- Much of the remainder of Australia saw little to no rainfall.

In cropping regions, falls were recorded in south-eastern regions, while other areas remained comparatively dry:

- Cropping regions in South Australia, Victoria, and southern New South Wales saw 5-25 millimetres of rainfall.
    - These moderate falls across south-eastern growing regions will maintain high soil moisture levels which and continue to support the growth of winter crops.
- Cropping regions in Queensland, northern New Soth Wales and Western Australia saw little to no rainfall over the period.
    - Successive weeks of dry conditions in some regions will see a draw down of soil moisture to support crop and pasture growth.

Rainfall for the week ending 15 July 2026



 Issued: 15/7/2026

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

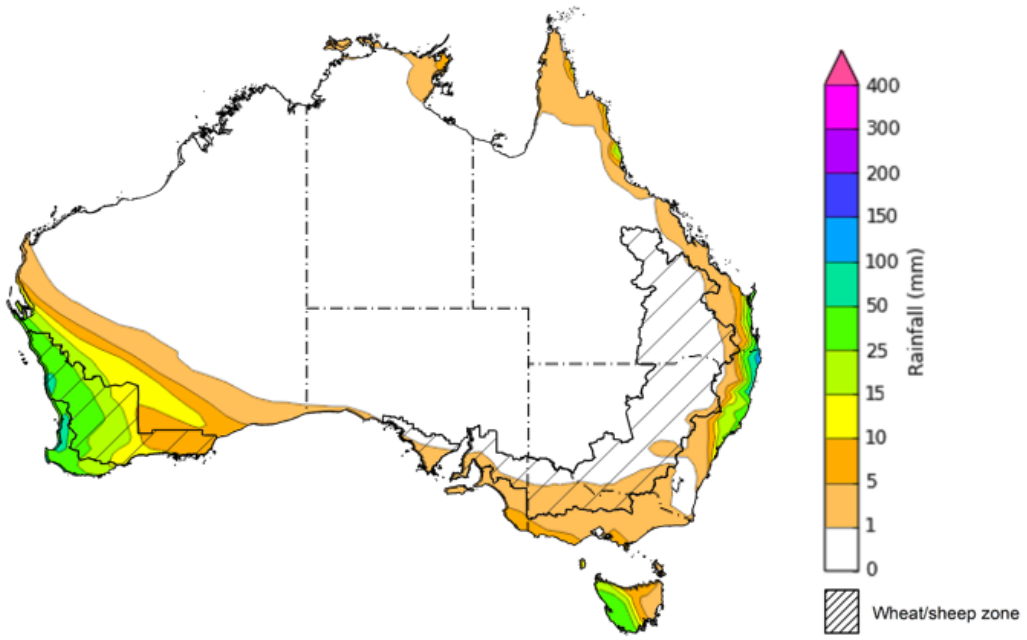
Over the 8 days to 23 July 2026, Australia is expected to remain largely dry, with exceptions in southwest and far eastern regions where low-pressure troughs and cold fronts are likely to bring some heavy falls.

- Falls of up to 100 millimetres are forecast for parts of southwest Western Australia, north-eastern New South Wales, and south-eastern Queensland. Tasmania is forecast to see up to 50 millimetres in the west.
- Remaining areas are expected to see little to no rainfall.

Across cropping regions, falls are expected to be limited, with exceptions in the southwest:

- Falls of 5-50 millimetres are forecast for Western Australia, with isolated areas expected to see falls up to 100 millimetres.
    - If realised, these expected falls will provide a timely boost to soil moisture levels following are relatively dry stary to July and continue to support and growth of winter crops and pastures in western regions.
- Remaining cropping regions are forecast to see little to no rainfall.

Total forecast rainfall for the period 16 July to 23 July 2026



 Issued 16/7/2026
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. June precipitation percentiles and current production conditions

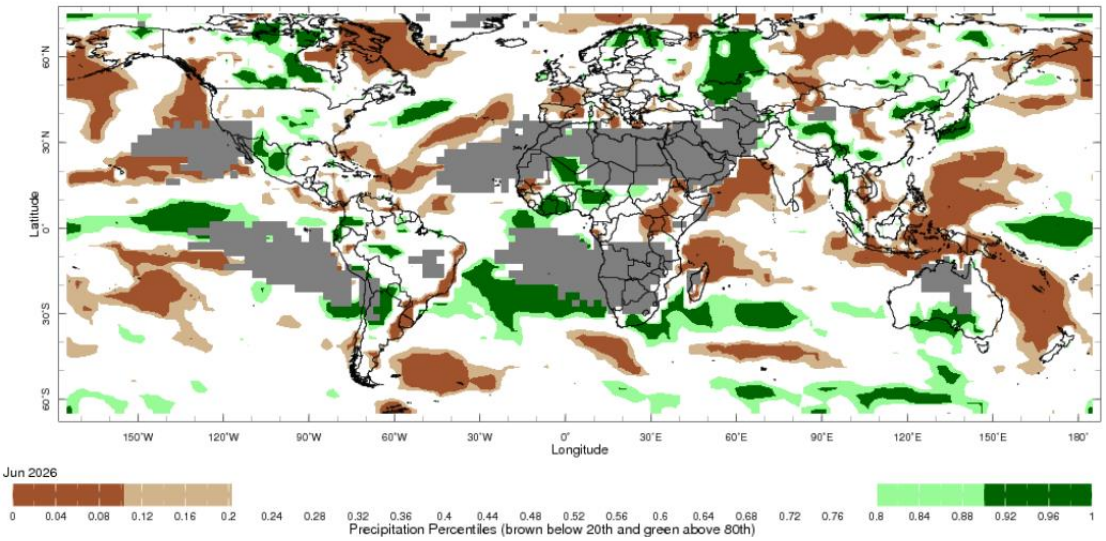
Crop production is affected by long-term trends in average rainfall and temperature, interannual climate variability, shocks during specific growth stages, and extreme weather events. Some crops are more tolerant than others to certain types of stresses, and at each growth stage, different types of stresses affect crop species in different ways.

Precipitation anomalies and outlooks presented below indicate the current and expected future production conditions for major grain and oilseed producing countries (responsible for over 80% of global crop production). This is an important input to assessing the global grain supply outlook.

Precipitation in June 2026 was variable across the world's major grain and oilseed producing regions:

- In the **northern hemisphere**, precipitation was above average in much northern and western China, parts of the northern Black Sea region, southern Canada, and central parts of the United States. Precipitation was generally below average in western Europe, central China, and scattered areas of India and the eastern United States. Precipitation was generally average across the remaining major northern hemisphere grain and oilseed producing regions.
- In the **southern hemisphere**, precipitation was below average across much of eastern Brazil and Argentina, as well as parts of Southeast Asia including Indonesia and the Philippines. Precipitation was above average across southern Australia, northern Argentina and parts of Brazil. Precipitation was generally average across the remaining major southern hemisphere grain and oilseed producing regions.

Global precipitation percentiles, June 2026

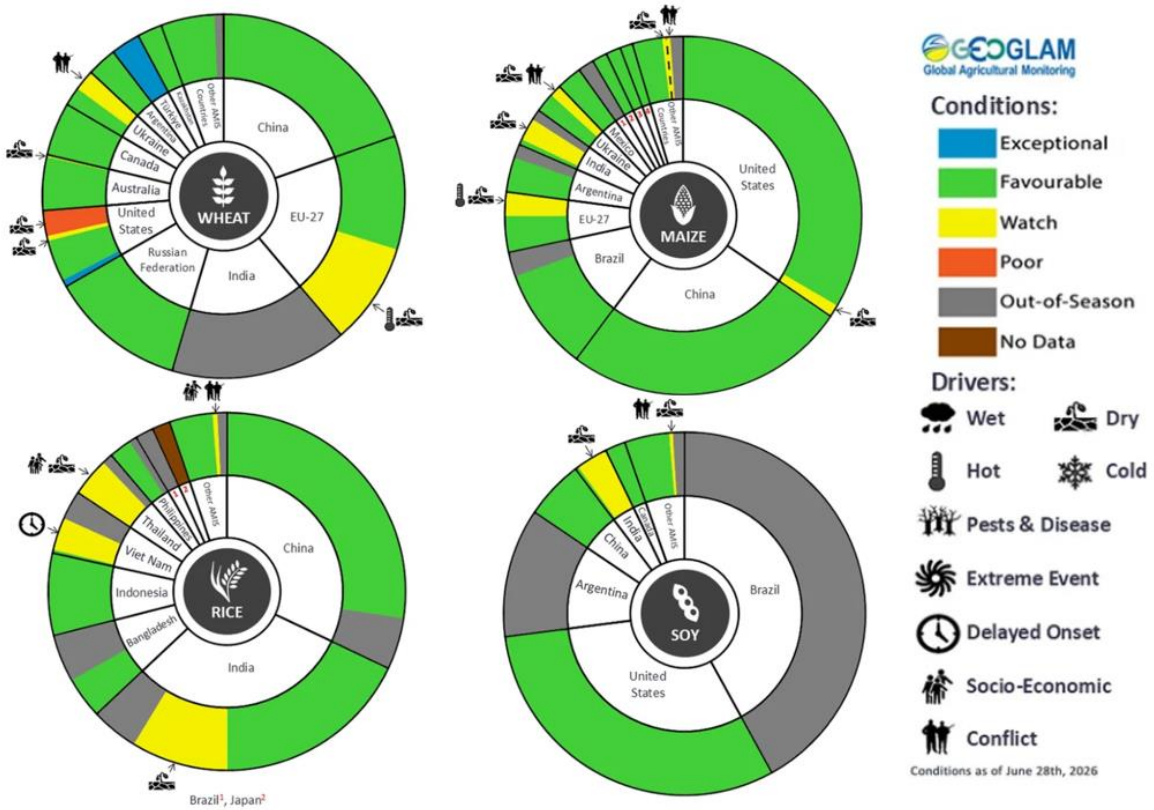


Note: The world precipitation percentiles indicate a ranking of precipitation for April, with the driest (0th percentile) being 0 on the scale and the wettest (100th percentile) being 1 on the scale. Percentiles are based on precipitation estimates from the NOAA Climate Prediction Center's Climate Anomaly Monitoring System Outgoing Precipitation Index dataset. Precipitation estimates for April are compared with rainfall recorded

As of 28 June 2026, global production conditions were generally favourable for wheat, maize, rice and soybeans, however, there are some areas of production concern across all four commodities:

- **Wheat –** In the **northern hemisphere**, wheat is developing under broadly favourable conditions in China, central areas of the European Union, and the Black Sea region, while unfavourable conditions across parts of the United States, and western and eastern Europe are likely to impact production outcomes. In the **southern hemisphere,** wheat is developing under generally favourable conditions.
- **Maize –** In the **southern hemisphere**, conditions have been largely favourable for the harvest across much of Brazil and Argentina. However, dry and heatwave conditions in **northern hemisphere** growing regions, including western Europe and India, are likely to weigh on crop outcomes.
- **Rice –** Global conditions remain broadly favourable for most major rice production regions, with exceptions in Thailand, parts of India, and Vietnam.
- **Soybeans –** Harvest has concluded in the **southern hemisphere**. Meanwhile, in the **northern hemisphere** crop establishment in the United States, Canada, China, and Ukraine has be broadly favourable, however, in **India** sowing is just beginning under mixed conditions due to the slow progress of the Southwest Monsoon and dry soils.

Crop conditions, AMIS countries, 28 June 2026



AMIS Agricultural Market Information System.
Source: AMIS

The global climate outlook for August 2026 to October 2026 indicates that mixed rainfall conditions are expected for the world's major grain and oilseed producing regions. Outlooks and potential production impacts are presented in the following table.

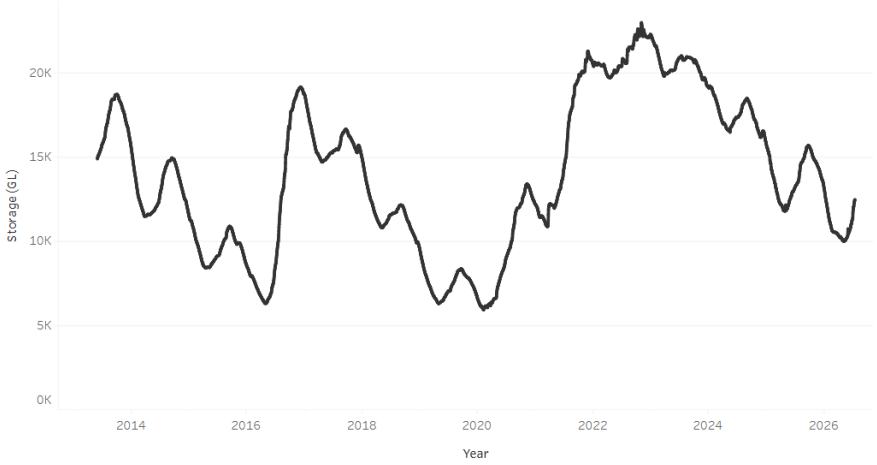
Rainfall outlook and potential impact on the future state of production conditions, August 2026 - October 2026

Region	Rainfall outlook	Potential impact on production
Argentina	Above average rainfall is likely across parts of central and southern Argentina, with broadly average to below average rainfall in the north.	Anticipated rainfall is likely to support the heading and vegetative development of wheat, but could impede the planting of cotton and corn.
Black Sea Region	Above average rainfall is expected across northern parts of Türkiye, while average rainfall is expected in remaining areas.	Above average rainfall is likely to support vegetative development and maturation of cotton, rice, and corn in Türkiye.
Brazil	Rainfall outcomes across Brazil are expected to be below average in many northern and western areas, while central and southern areas see broadly average to above average conditions.	Above average rainfall across southern and central Brazil is likely to support the heading of wheat in August and support the filling and growth of major crops, with western areas more likely to see adverse yield outcomes.
Canada	Rainfall across Canada is expected to be mixed, with broadly average conditions and areas of both below and above average precipitation in southern regions.	Average rainfall is likely to support corn, soybean, and sunflower flowering, and the development of grain and oilseeds over October.
China	Average rainfall is expected across most of China, with scattered areas of above average rainfall in inland and western regions.	Average rainfall across much of China is likely to support the growth and development of major crops over the season, including rice, cotton, corn and soybeans.
European Union	Average rainfall expected for much of the European Union, with exceptions in parts of Spain, France, and Italy where below average rainfall is more likely.	Average rainfall across much of Europe is likely to benefit the development of corn, soybeans, and sunflower, with some downside risk in affected western areas.
South Asia (India)	Below average rainfall is expected across much of southern and western India.	Anticipated rainfall is likely to present a downside production risk with flowering for many major crops occurring in August, and the flowering of cotton in September.
Southeast Asia (SEA)	Below average rainfall is likely across much of Southeast Asia.	Below average rainfall in SEA is likely to impede growth and development outcomes for rice and corn.
The United States	Below average to average rainfall is likely for much of the eastern United States, with western and central areas likely to see above average falls.	Below average to average rainfall conditions expected across the eastern US is likely to reduce soil moisture and impact yield potential of major grains and oilseeds, but support the harvesting of crops.

1.4. Water markets – current week

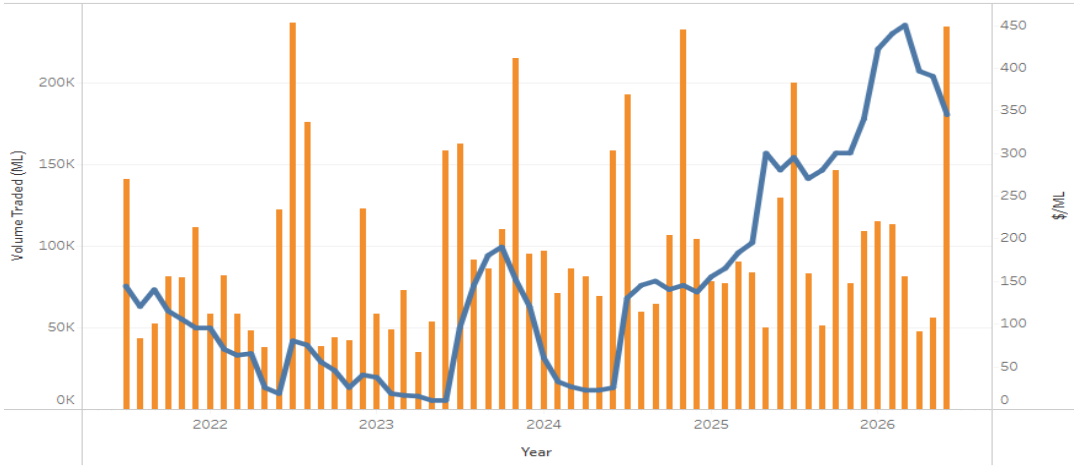
Water storage levels in the Murray-Darling Basin (MDB) increased by 400 gigalitres (GL) between 9 July 2026 and 16 July 2026. The current volume of water held in storages is 12,432 GL, equivalent to 56% of total storage capacity. This is 7% or 983 GL less than the same time last year. Water storage data 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 $426/ML on 9 July 2026 to $403/ML on 16 July 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.

Surface water trade activity 2022-2026, Victorian Murray below the Barmah Choke



Water market prices, Southern Murray–Darling Basin

Region	$/ML
NSW Murray Above	320
NSW Murrumbidgee	416
Vic Greater Goulburn	410
Vic Murray Below	403

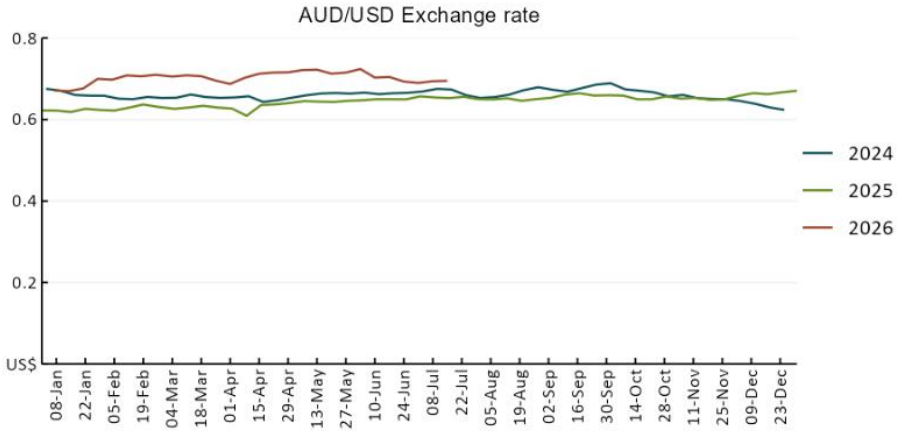
Note: The water allocation prices shown are volume weighted average prices based on the last 10 trades. Price data is sourced from Waterflow and current as at 25 June 2026.

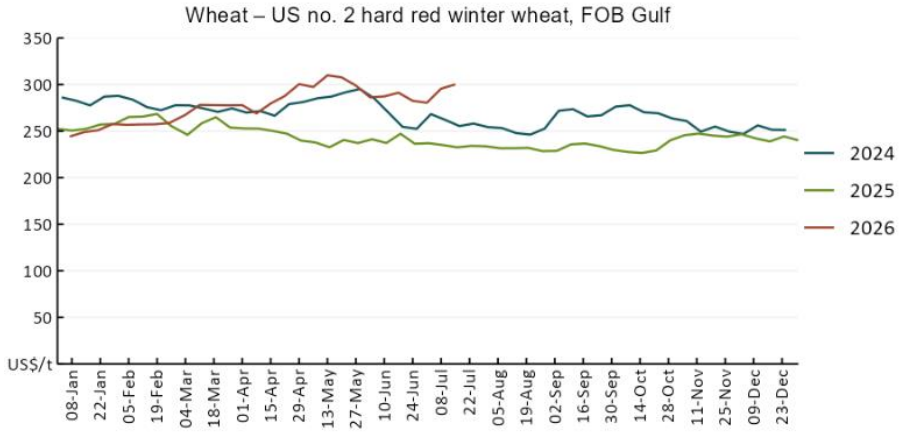
To access the full, interactive, weekly water dashboard, which contains the latest and historical water storage, water market and water allocation information, please visit https://www.agriculture.gov.au/abares/products/weekly_update/weekly-update-260625

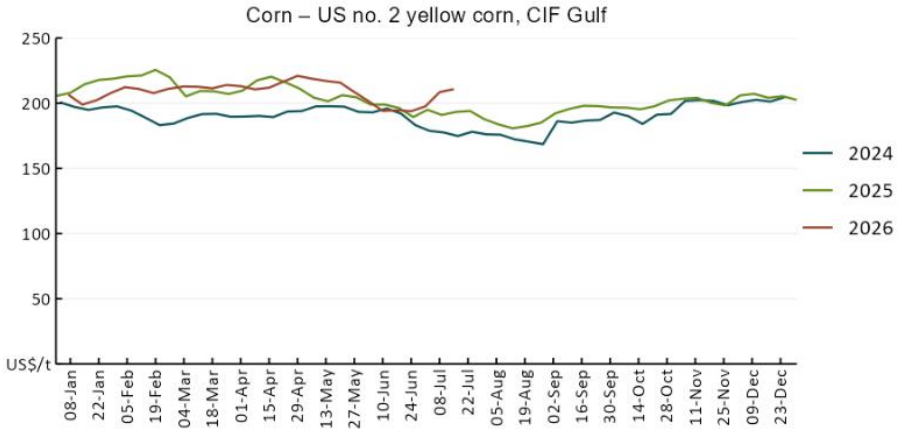
2. Commodities

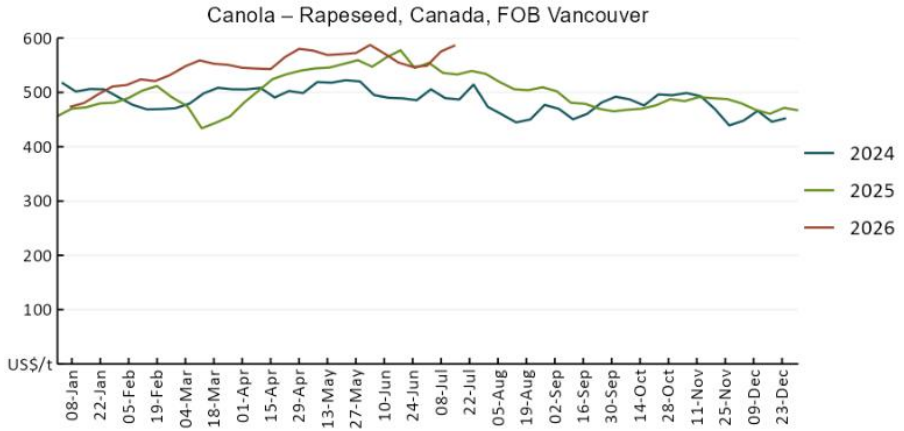
Indicator	Week average	Unit	Latest Price	Previous Week	Weekly change	Price 12 months ago	Annual change
Selected world indicator prices							
AUD/USD Exchange rate	15-Jul	A$/US$	0.70	0.69	0%	0.65	6%
Wheat – US no. 2 hard red winter wheat, FOB Gulf	15-Jul	US$/t	300	296	2%	235	28%
Corn – US no. 2 yellow corn, FOB Gulf	15-Jul	US$/t	211	209	1%	192	10%
Canola – Rapeseed, Canada, FOB Vancouver	15-Jul	US$/t	587	575	2%	539	9%
Cotton – Cotlook A Index	15-Jul	USc/lb	90.5	88.6	2%	78.9	
Sugar – Intercontinental Exchange, nearby futures, no.11 contract	15-Jul	USc/lb	14.8	15.1	-2%	16.4	-9%
Wool – Eastern Market Indicator	15-Jul	Ac/kg clean	1,901	1,909	0%	1,220	56%
Wool – Western Market Indicator	8-Jul	Ac/kg clean	2,094	2,072	1%	1,360	54%
Selected Australian grain export prices							
Australian Premium White (APW) Wheat, FOB Port Adelaide, SA	15-Jul	A$/t	394	394	0%	391	1%
Australian Standard White (ASW) Wheat, FOB Port Adelaide, SA	15-Jul	A$/t	385	383	1%	387	0%
Feed Barley – FOB Port Adelaide, SA	15-Jul	A$/t	376	379	-1%	373	1%
Canola – FOB Kwinana, WA	15-Jul	A$/t	843	833	1%	817	3%
Grain Sorghum – FOB Brisbane, QLD	15-Jul	A$/t	432	431	0%	426	1%
Selected domestic livestock indicator prices							
Beef – Eastern Young Cattle Indicator	15-Jul	Ac/kg cwt	1,015	1,018	0%	748	36%
Mutton – Mutton indicator (18–24 kg fat score 2–3), VIC	15-Jul	Ac/kg cwt	919	919	0%	692	33%
Lamb – National Trade Lamb Indicator	15-Jul	Ac/kg cwt	1,239	1,244	0%	1,141	9%
Pig – Eastern Seaboard (60.1–75 kg), NSW buyer price	24-Jun	Ac/kg cwt	417	420	-1%	452	-8%
Live cattle – Light steers to Indonesia	17-Jun	Ac/kg lwt	400	400	0%	342	17%
Global Dairy Trade (GDT) weighted average prices							
Dairy – Whole milk powder	8-Jul	US$/t	3,425	3,589	-5%	3,894	-12%
Dairy – Skim milk powder	8-Jul	US$/t	3,135	3,368	-7%	2,752	14%
Dairy – Cheddar cheese	8-Jul	US$/t	3,900	4,471	-13%	4,725	-17%
Dairy – Anhydrous milk fat	8-Jul	US$/t	6,341	6,601	-4%	6,951	-9%

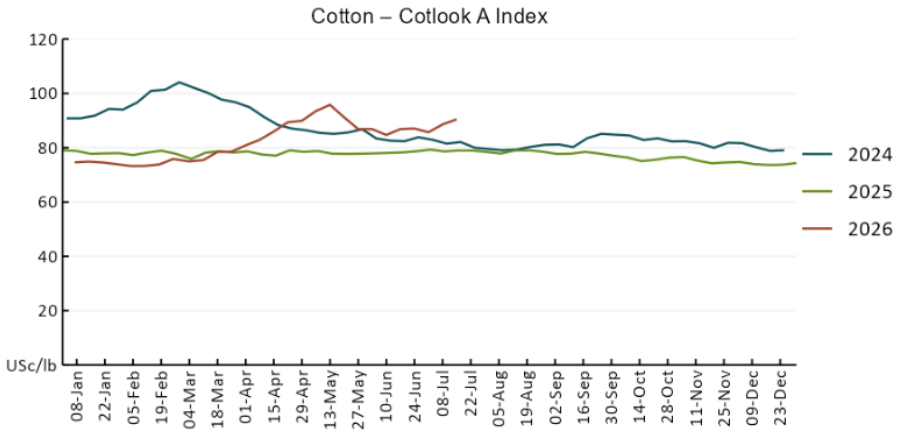
2.1. Selected world indicator prices

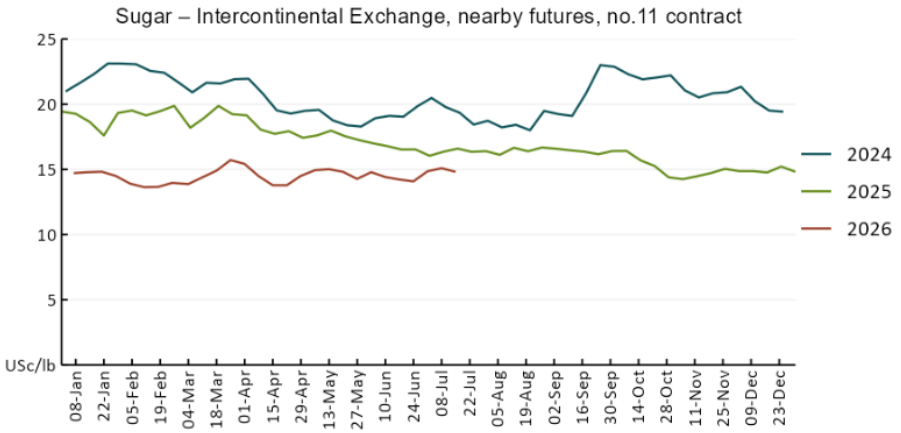









Cotton – Cotlook A Index
120
100
80
60
40
20
USc/lb
08-Jan
22-Jan
05-Feb
19-Feb
04-Mar
18-Mar
01-Apr
15-Apr
29-Apr
13-May
27-May
10-Jun
24-Jun
08-Jul
22-Jul
05-Aug
19-Aug
02-Sep
16-Sep
30-Sep
14-Oct
28-Oct
11-Nov
25-Nov
09-Dec
23-Dec
2024
2025
2026


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
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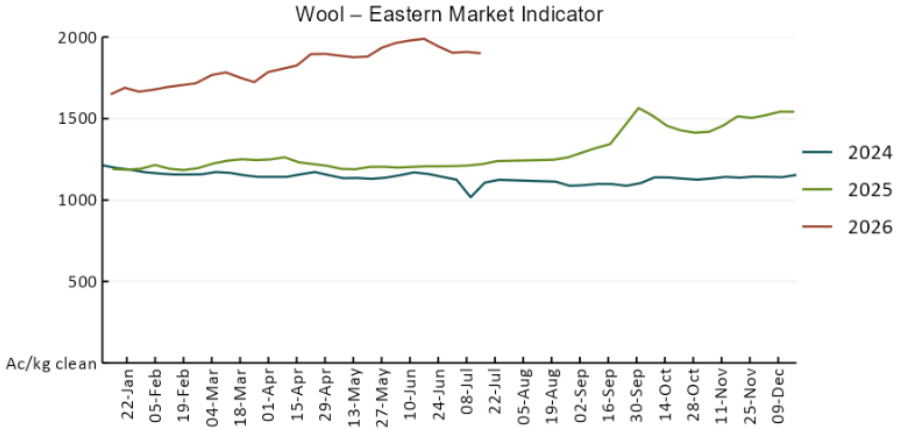
2026


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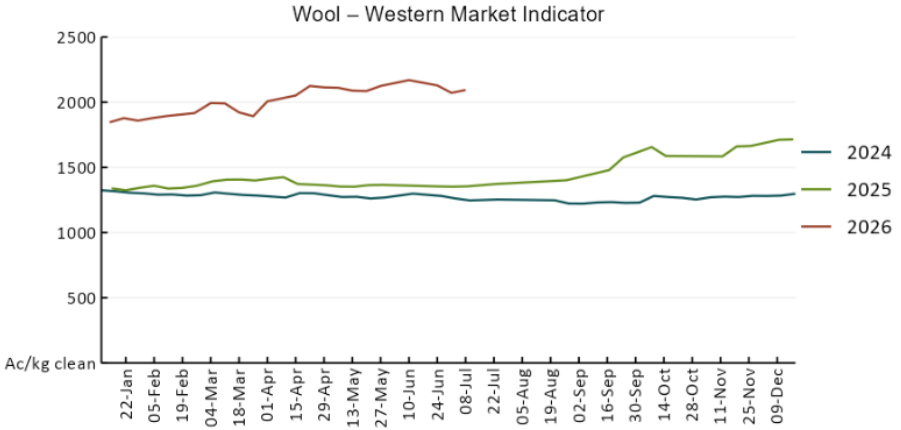
Wool – Western Market Indicator
2500
2000
1500
1000
500
Ac/kg clean
22-Jan
05-Feb
19-Feb
04-Mar
18-Mar
01-Apr
15-Apr
29-Apr
13-May
27-May
10-Jun
24-Jun
08-Jul
22-Jul
05-Aug
19-Aug
02-Sep
16-Sep
30-Sep
14-Oct
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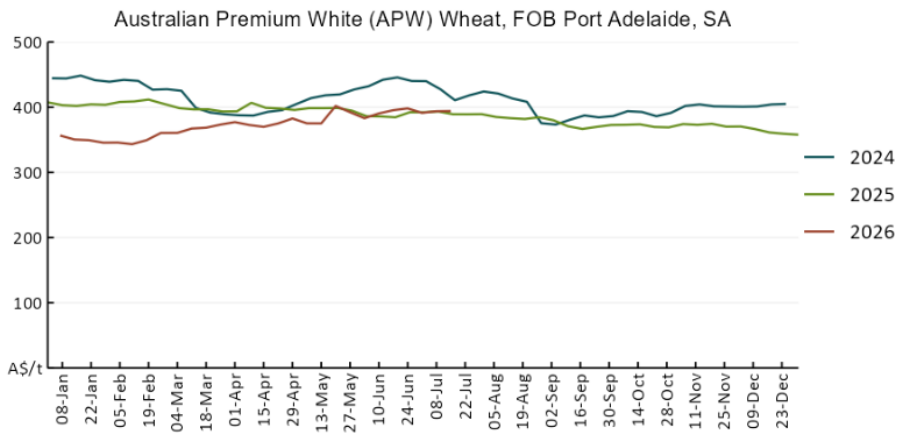
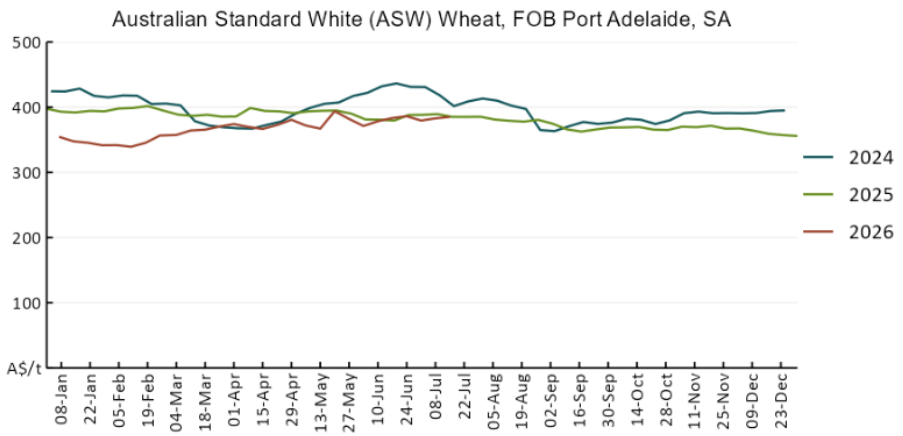
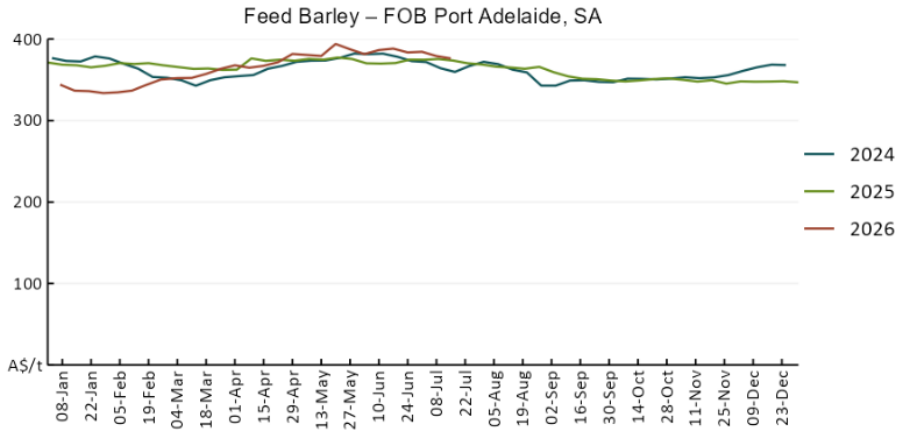
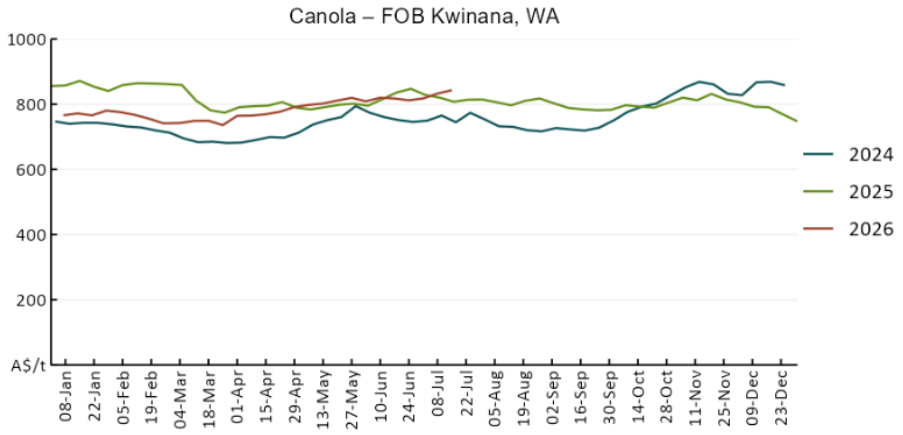
25-Nov
09-Dec
2024
2025
2026

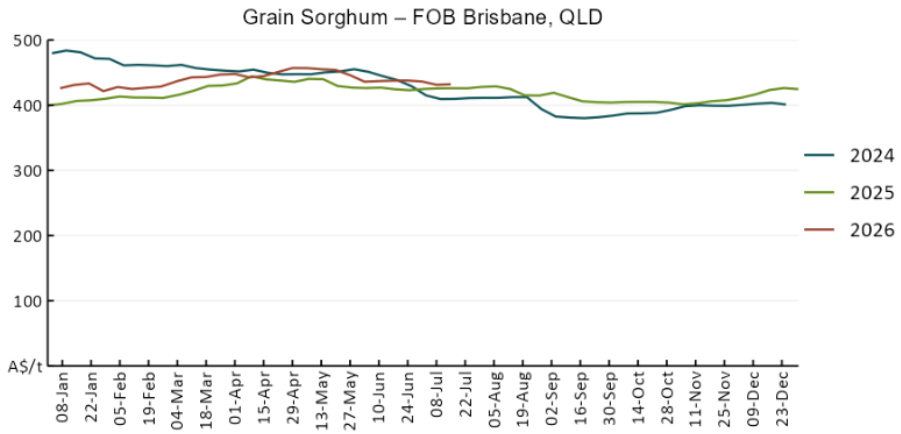
3.2 Selected domestic crop indicator prices



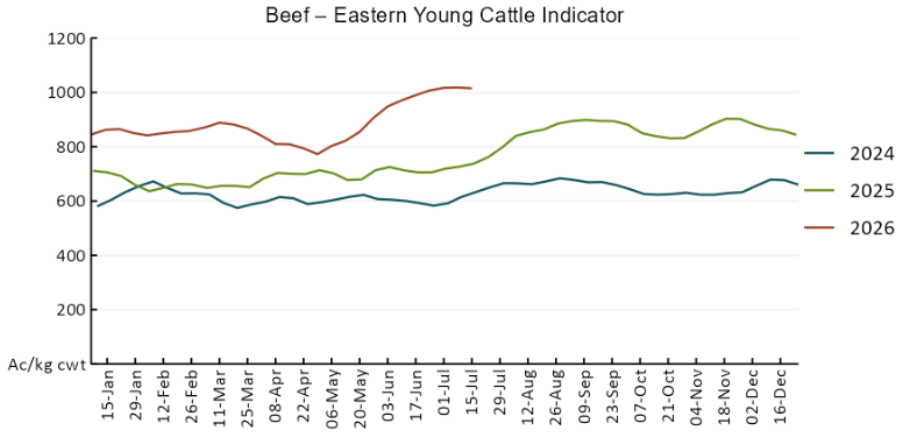


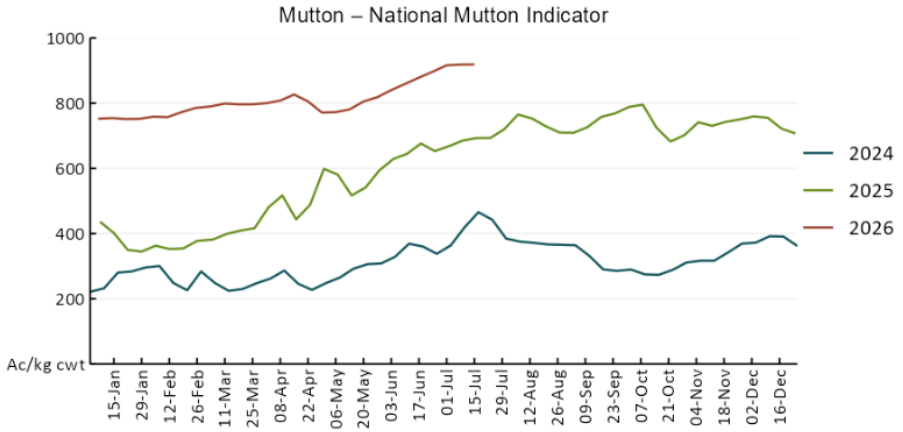


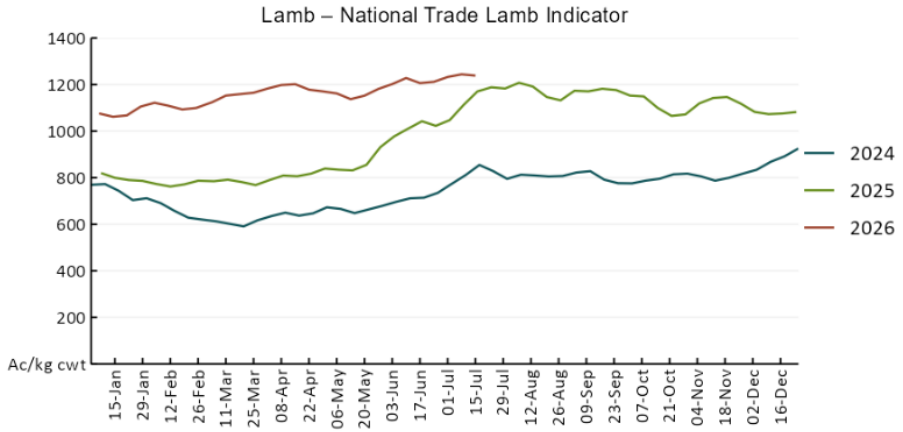


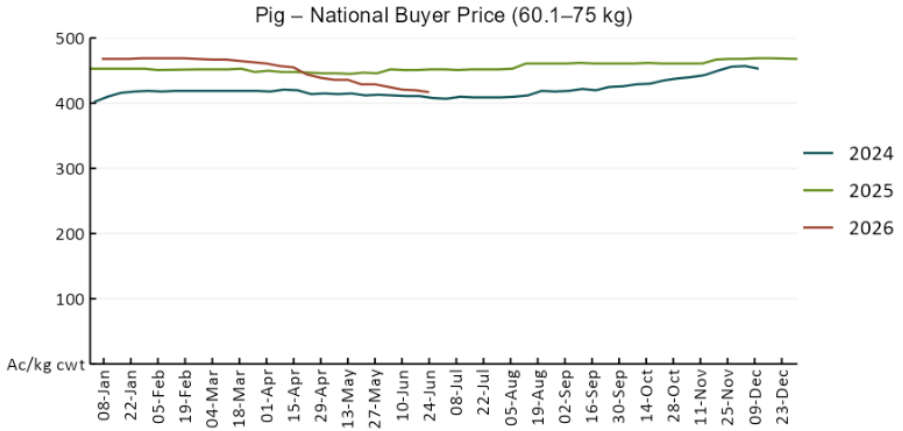

Grain Sorghum – FOB Brisbane, QLD
500
400
300
200
100
A$/t
08-Jan
22-Jan
05-Feb
19-Feb
04-Mar
18-Mar
01-Apr
15-Apr
29-Apr
13-May
27-May
10-Jun
24-Jun
08-Jul
22-Jul
05-Aug
19-Aug
02-Sep
16-Sep
30-Sep
14-Oct
28-Oct
11-Nov
25-Nov
09-Dec
23-Dec
2024
2025
2026

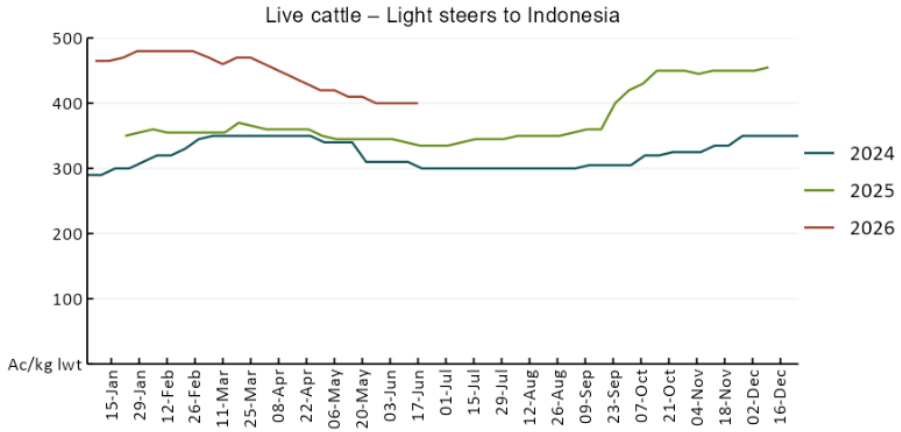
3.3 Selected domestic livestock indicator prices



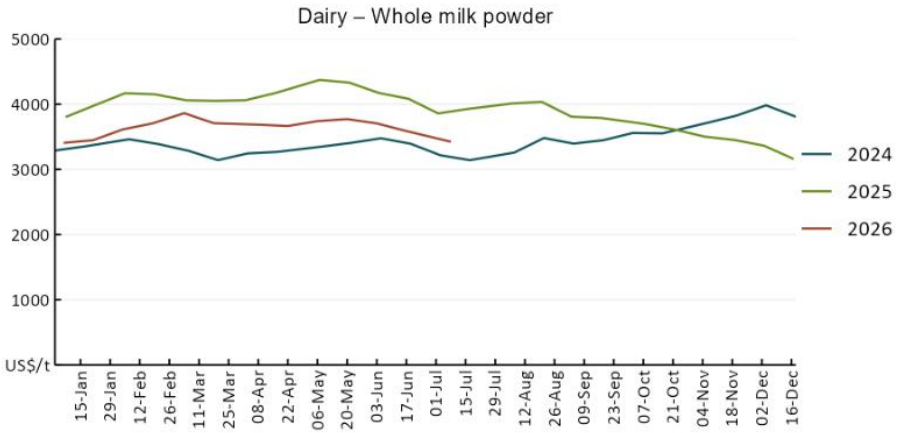


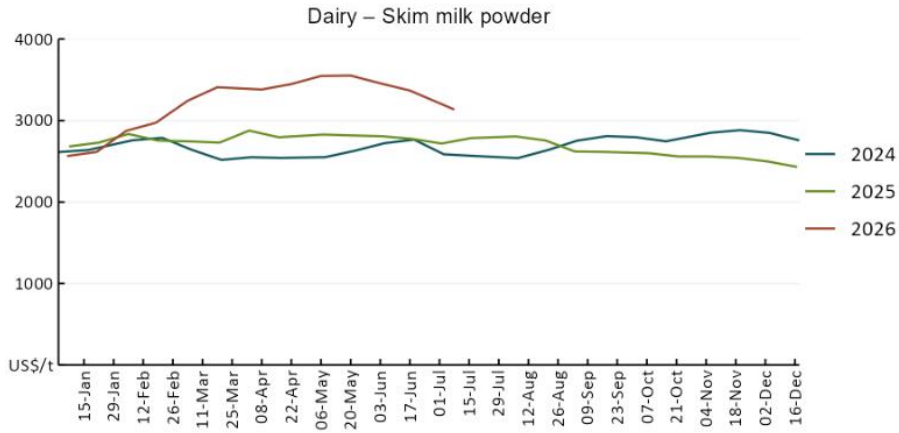


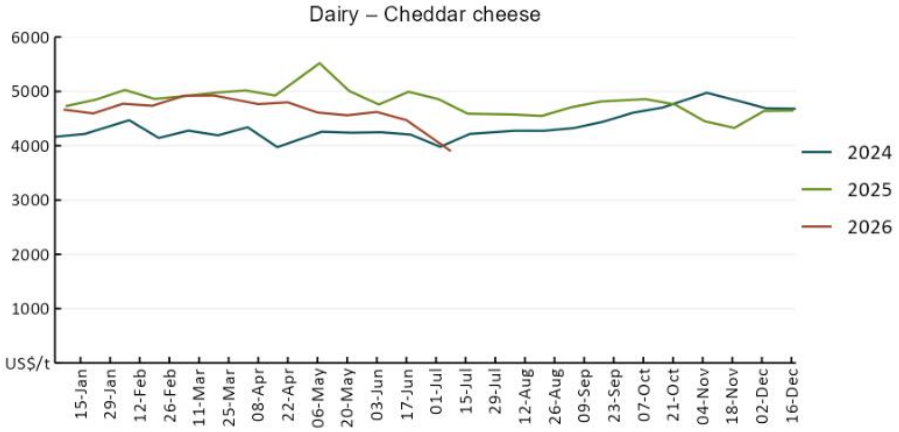


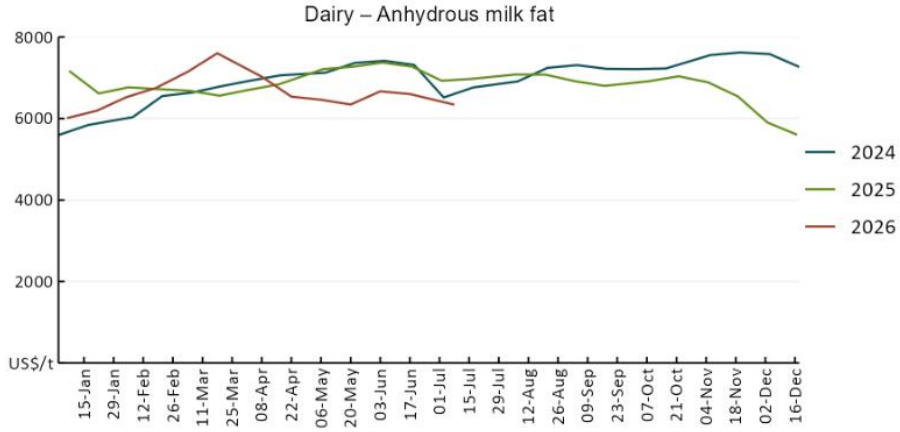

Live cattle – Light steers to Indonesia
500
400
300
200
100
Ac/kg lwt
15-Jan
29-Jan
12-Feb
26-Feb
11-Mar
25-Mar
08-Apr
22-Apr
06-May
20-May
03-Jun
17-Jun
01-Jul
15-Jul
29-Jul
12-Aug
26-Aug
09-Sep
23-Sep
07-Oct
21-Oct
04-Nov
18-Nov
02-Dec
16-Dec
2024
2025
2026

3.4 Global Dairy Trade (GDT) weighted average prices

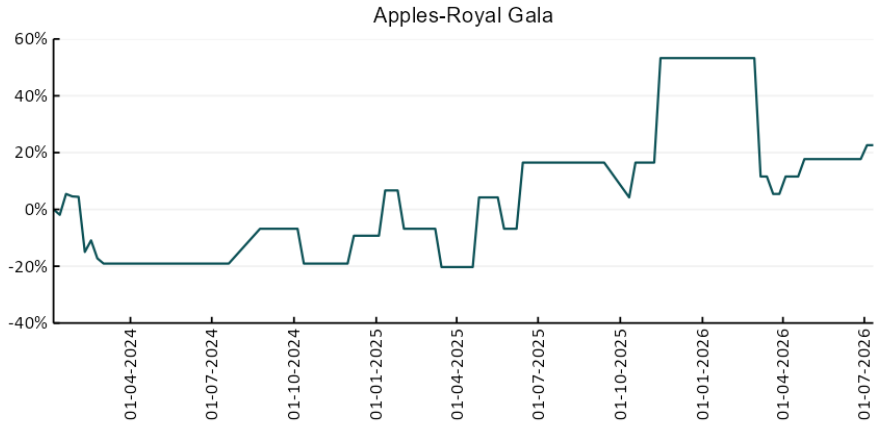


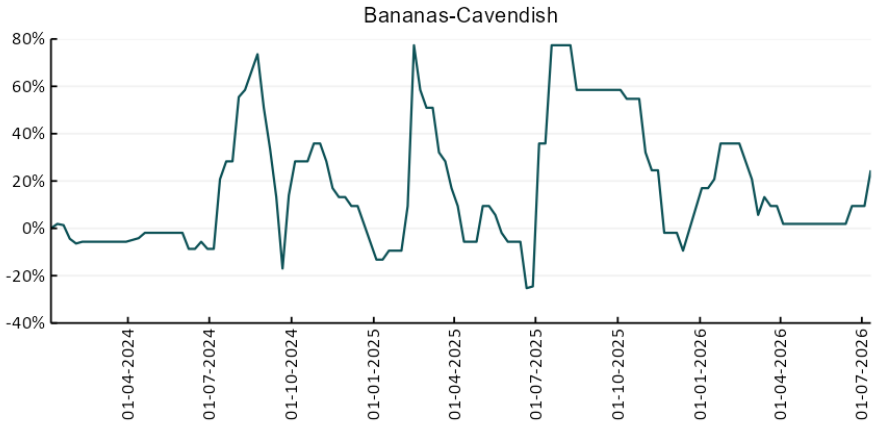


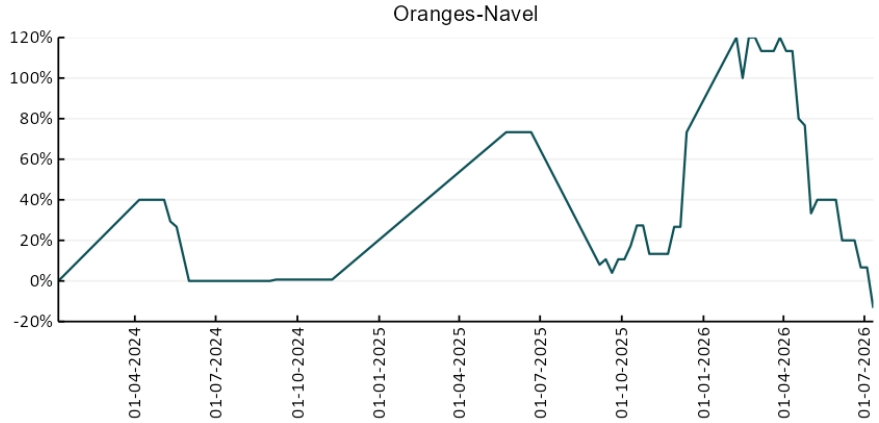


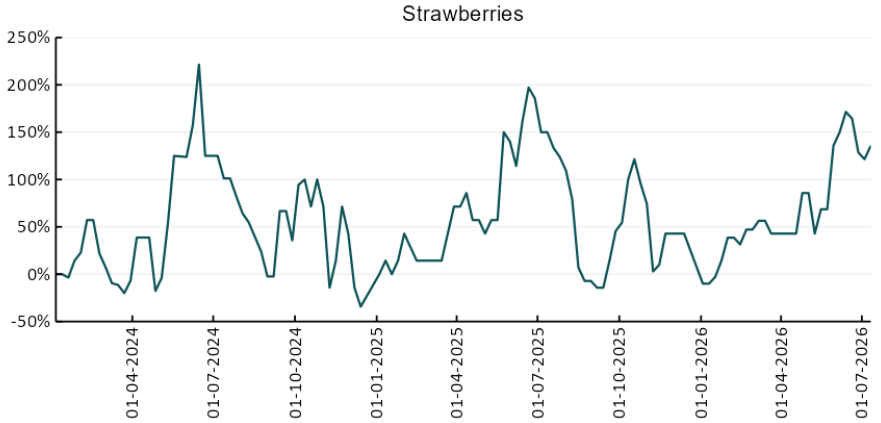


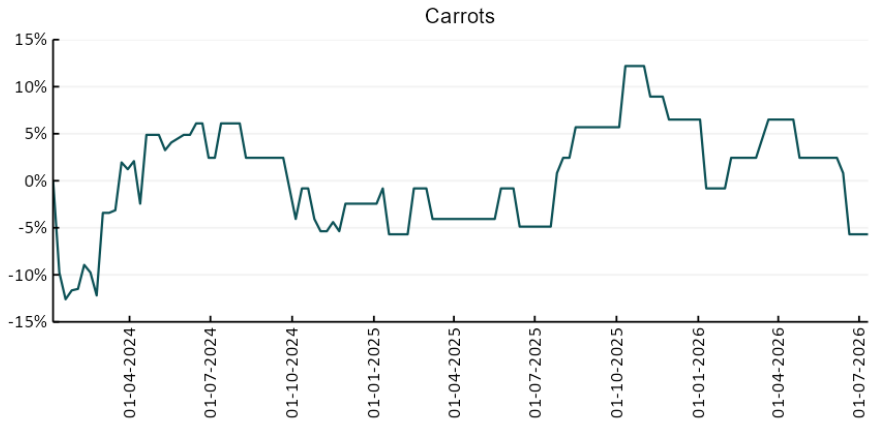
3.5 Selected fruit and vegetable prices

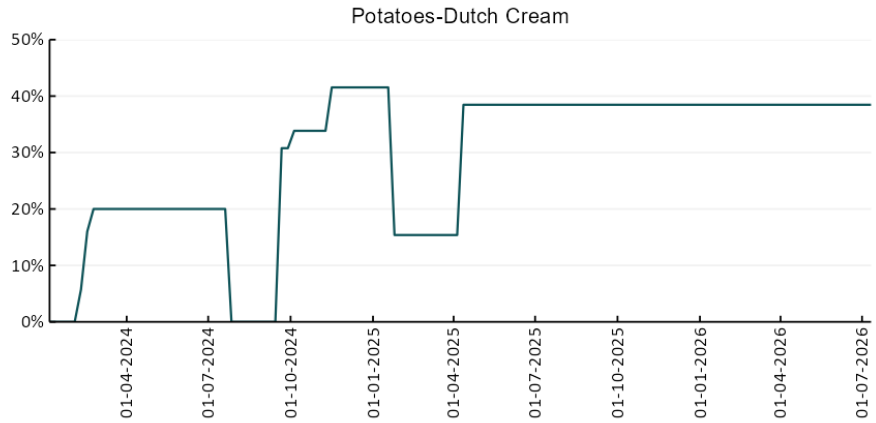


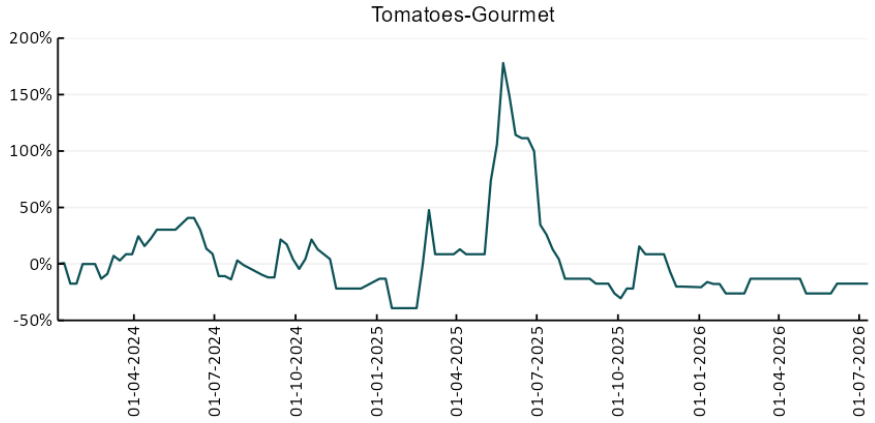


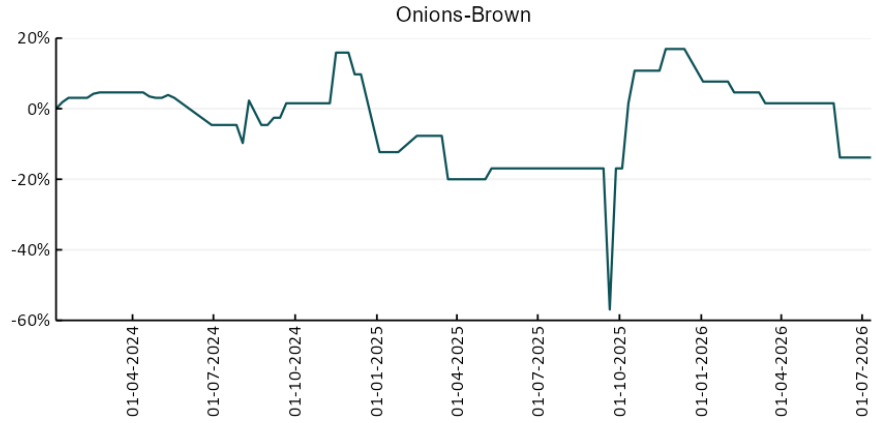


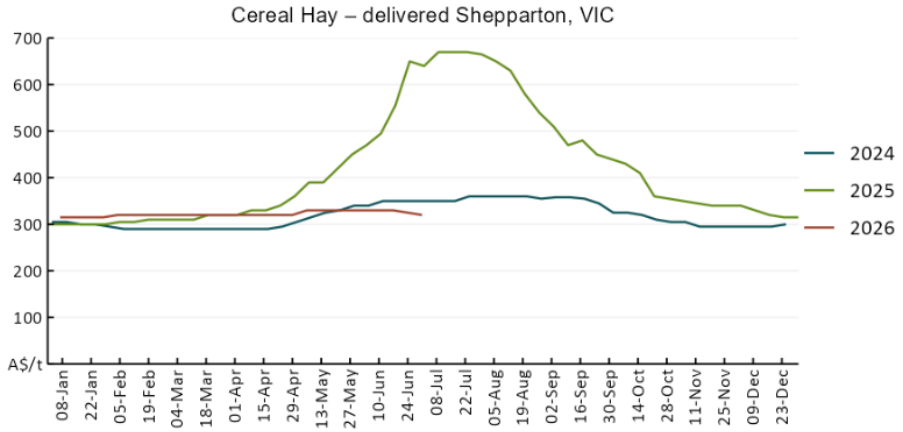


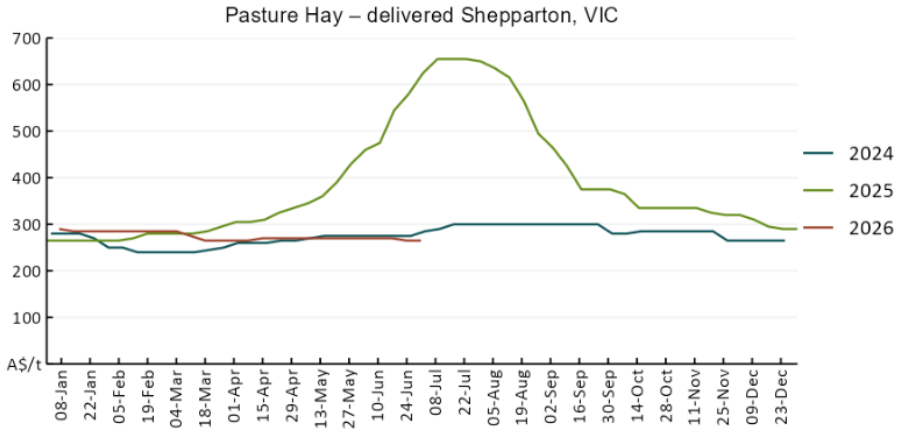

Carrots
15%
10%
5%
0%
-5%
-10%
-15%
01-04-2024
01-07-2024
01-10-2024
01-01-2025
01-04-2025
01-07-2025
01-10-2025
01-01-2026
01-04-2026
01-07-2026

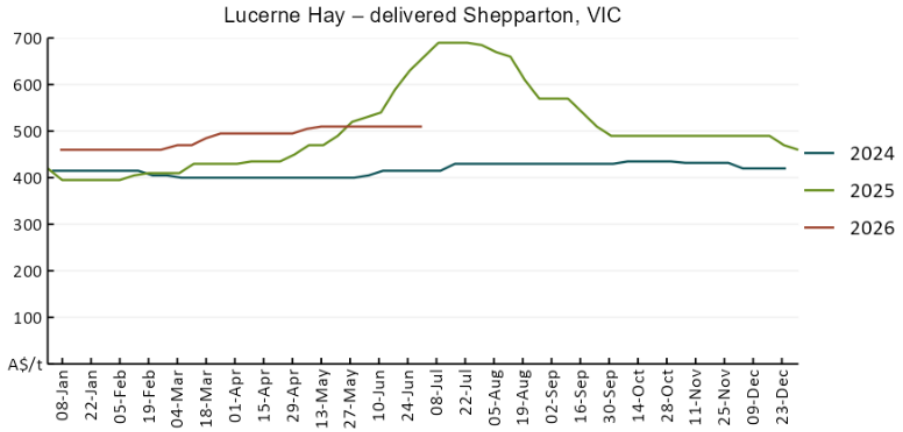

Potatoes-Dutch Cream
50%
40%
30%
20%
10%
0%
01-04-2024
01-07-2024
01-10-2024
01-01-2025
01-04-2025
01-07-2025
01-10-2025
01-01-2026
01-04-2026
01-07-2026


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
01-04-2026
01-07-2026

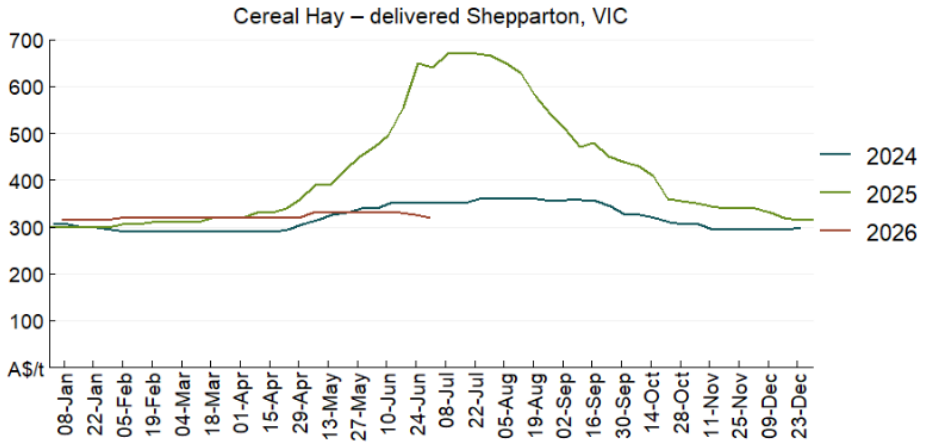

Onions-Brown
20%
0%
-20%
-40%
-60%
01-04-2024
01-07-2024
01-10-2024
01-01-2025
01-04-2025
01-07-2025
01-10-2025
01-01-2026
01-04-2026
01-07-2026

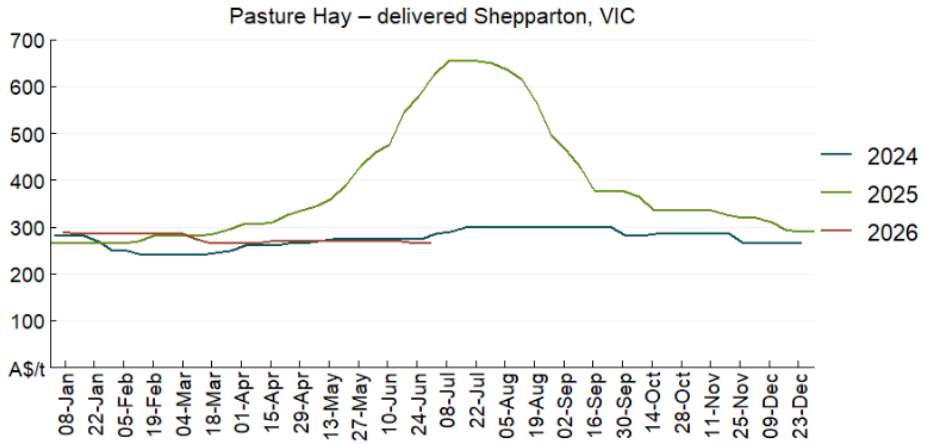

Cereal Hay – delivered Shepparton, VIC
700
600
500
400
300
200
100
A$/t
08-Jan
22-Jan
05-Feb
19-Feb
04-Mar
18-Mar
01-Apr
15-Apr
29-Apr
13-May
27-May
10-Jun
24-Jun
08-Jul
22-Jul
05-Aug
19-Aug
02-Sep
16-Sep
30-Sep
14-Oct
28-Oct
11-Nov
25-Nov
09-Dec
23-Dec
2024
2025
2026

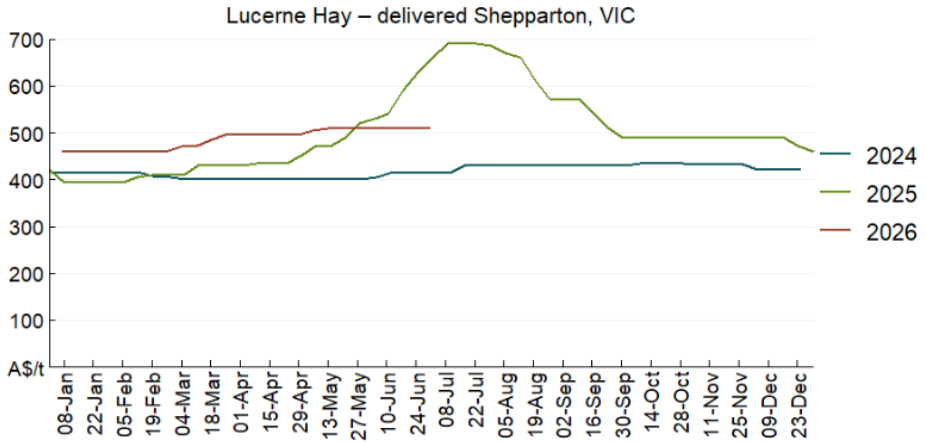

Pasture Hay – delivered Shepparton, VIC
700
600
500
400
300
200
100
A$/t
08-Jan
22-Jan
05-Feb
19-Feb
04-Mar
18-Mar
01-Apr
15-Apr
29-Apr
13-May
27-May
10-Jun
24-Jun
08-Jul
22-Jul
05-Aug
19-Aug
02-Sep
16-Sep
30-Sep
14-Oct
28-Oct
11-Nov
25-Nov
09-Dec
23-Dec
2024
2025
2026


Lucerne Hay – delivered Shepparton, VIC
700
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
2024
2025
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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