



Australian Government

Australian Bureau of Agricultural and  
Resource Economics and Sciences

## Weekly Australian Climate, Water and Agricultural Update

28 July 2011

The full report is available from [www.abares.gov.au](http://www.abares.gov.au)

### Summary of key issues

- Rainfall received this week across southern parts of the country will assist winter crop growth, with further moderate to heavy rainfall forecast in the coming week in parts of southern Australia.
- Wet conditions in Queensland have increased the incidence of disease and impacted on the production of chilli and macadamia crops.
- Water storage levels in the Murray–Darling Basin increased this week by 60 gigalitres (GL) to approximately 85 per cent of total capacity.
- The world wheat indicator price (US Hard Red Winter, free-on-board Gulf ports) averaged US\$316 a tonne for the week ending 26 July 2011, compared with US\$311 in the previous week.
- While saleyard prices for young cattle were generally lower for the week ending 22 July 2011, young cattle prices across all states were around 10 per cent higher than the same time last year.
- Lower lamb yardings resulted in a general rise in saleyard lamb prices in the eastern states for the week ending 22 July 2011 while in Western Australia prices averaged lower despite another week of relatively low lamb saleyard throughput.
- Most fruit prices were lower in the week ending 23 July 2011, including bananas, but bean, broccoli and lettuce prices were sharply higher.
- Australian milk production was 0.5 per cent higher in June 2011 than the previous June. Over the twelve months to June 2011 milk production was 0.9 per cent higher.
- The nearby futures contract (December 2011) for cotton closed at US99.46 cents a pound on 15 Jul 2011, the first close under US100 cents a pound since January 2011.

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# 1. Climate

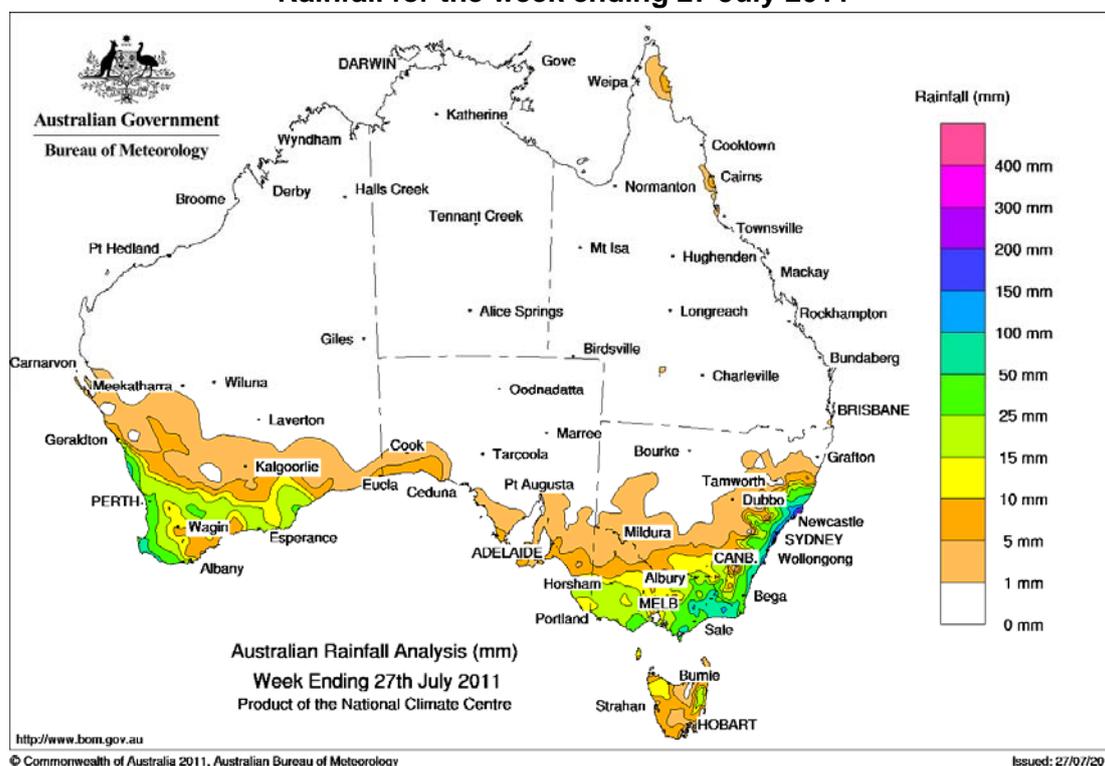
## 1.1. Notable events

- For the week ending 27 July 2011, most rainfall was recorded across southern Australia. The highest measured total for the week was 228 millimetres at Seal Rocks in central-east New South Wales.
- Rainfall across southern Australia this week will have improved soil moisture conditions and benefited winter crops, particularly in south-west Western Australia.
- Moderate to heavy rainfall is forecast in the coming week in parts of southern Australia, which will further benefit crops, particularly in south-western parts of Western Australia if it eventuates.
- Chilli production has been reduced in northern parts of Queensland by persistent rain which has increased the incidence of disease.
- Macadamia crop yields in Queensland are being affected by a fungal disease which causes nuts to fall off prematurely. The fungal disease has been exacerbated by recent wet conditions.

## 1.2. Rainfall this week

For the week ending 27 July 2011, rainfall was mostly received across southern Australia. For further information, go to [www.bom.gov.au/climate/current/weeklyrain.shtml](http://www.bom.gov.au/climate/current/weeklyrain.shtml).

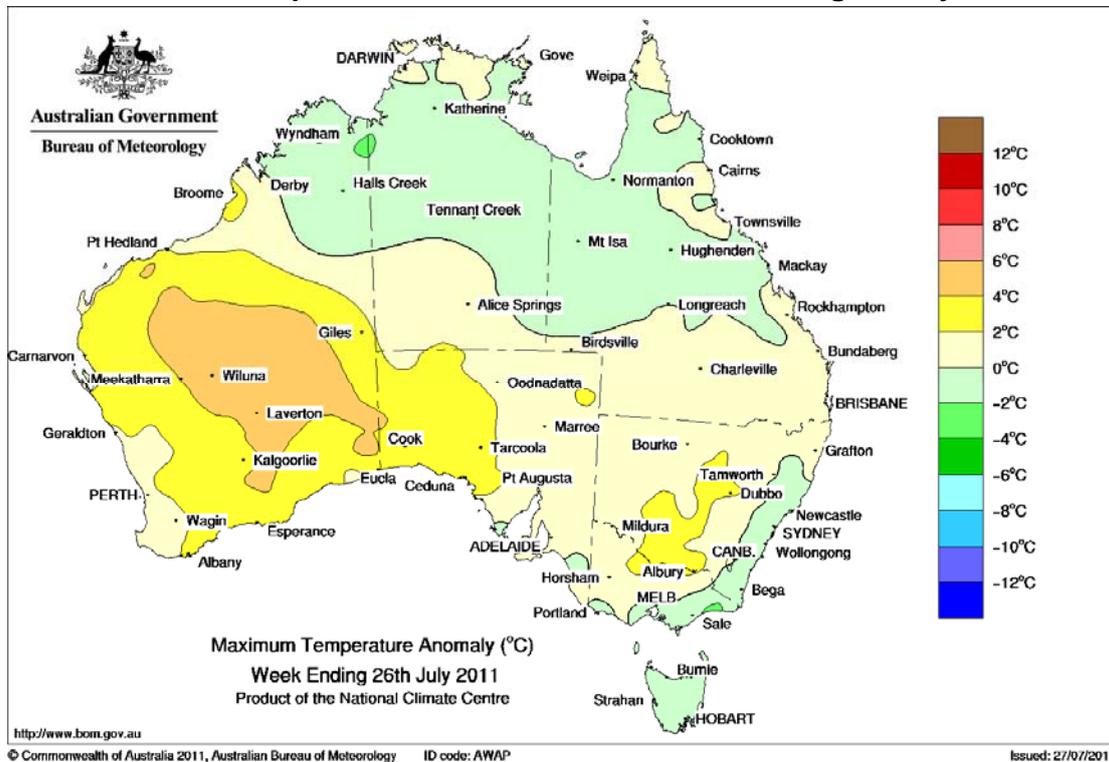
**Rainfall for the week ending 27 July 2011**



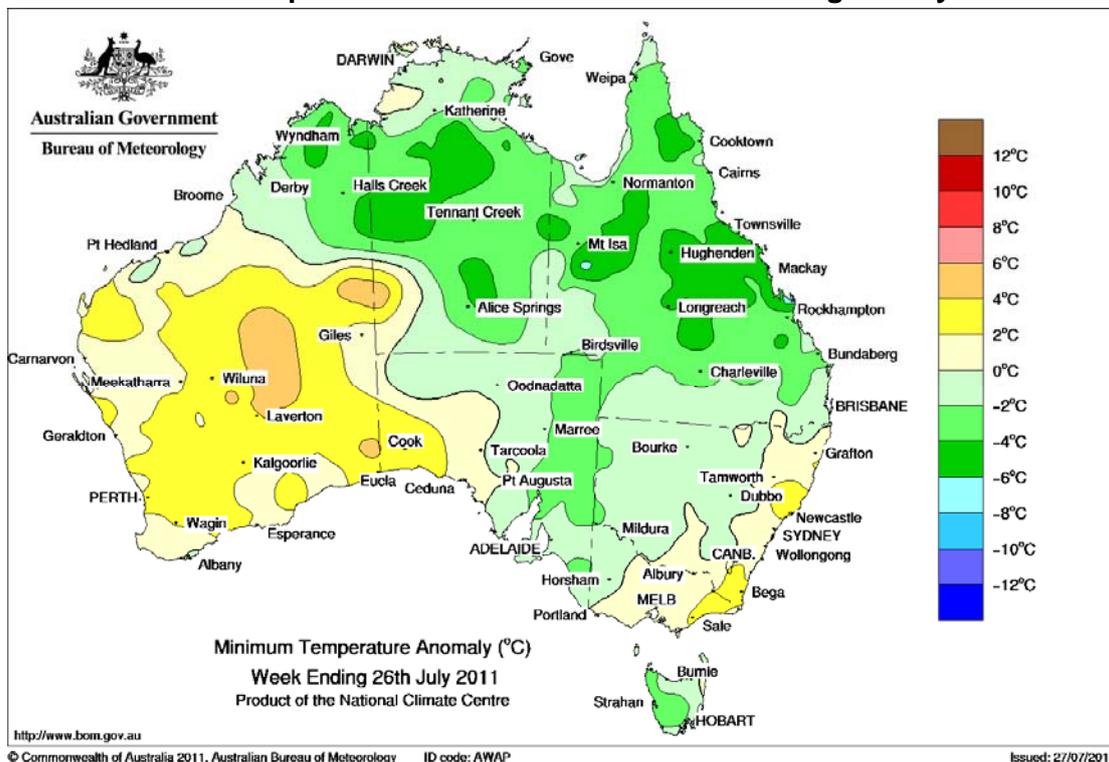
### 1.3. Temperature anomalies this week

Spatial temperature analyses are based on historical weekly temperature data provided by the Bureau of Meteorology. These temperature anomaly maps show the departure of the maximum and minimum from the long-term average. Temperature anomalies are calculated using high resolution gridded datasets from 1911 onwards. For further information on temperature anomalies, go to [www.bom.gov.au/jsp/awap/](http://www.bom.gov.au/jsp/awap/).

**Maximum temperature anomalies for the week ending 26 July 2011**



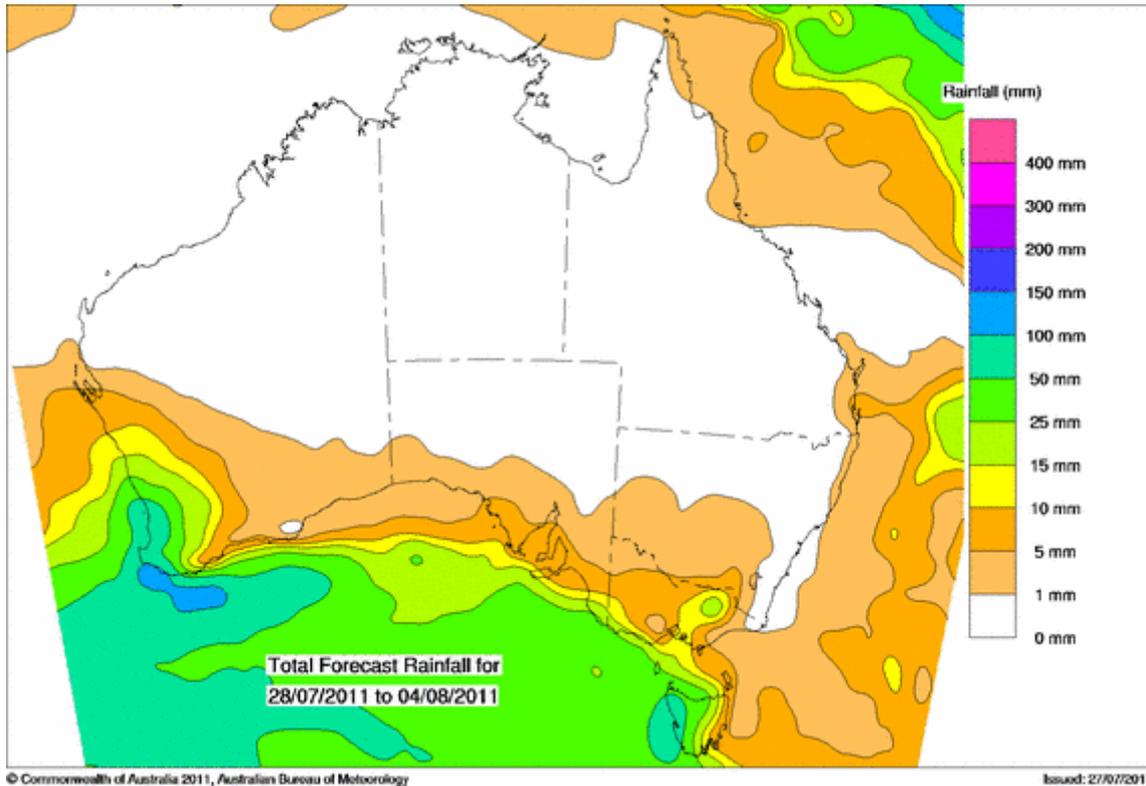
**Minimum temperature anomalies for the week ending 26 July 2011**



## 1.4. Rainfall outlook

The rainfall forecast below is produced from computer models. As it contains no input from weather forecasters, it is important to also check local forecasts and warnings by the Bureau of Meteorology.

**Total forecast rainfall for the period 28 July to 4 August 2011**

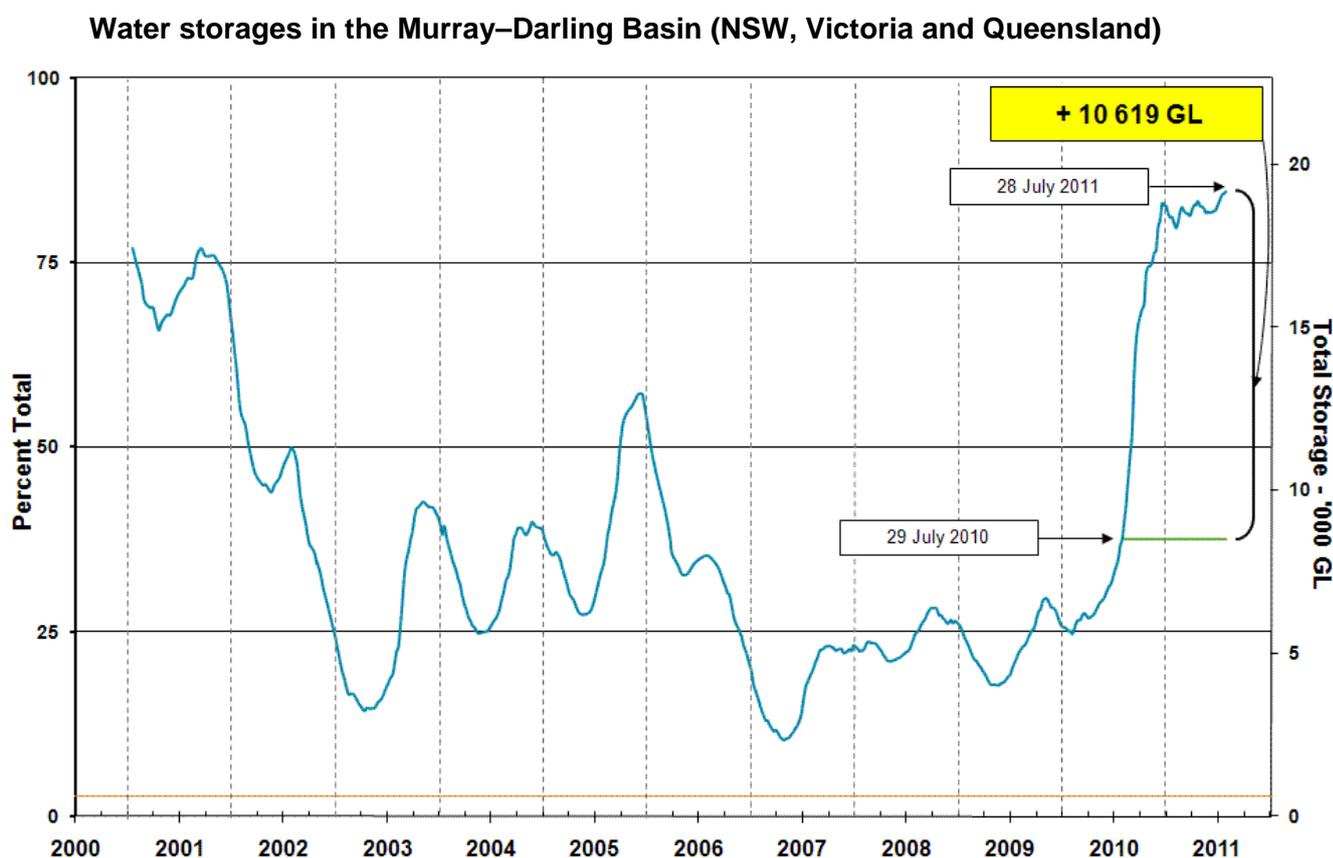


## 2. Water

### 2.1. Water availability and trading

- Water storage levels in the Murray–Darling Basin (MDB) increased this week by 60 gigalitres (GL) to approximately 85 per cent of total capacity. This is 47 percentage points or 10 619 GL more than this time last year.
- There was no trade in the three representative major temporary water markets over the past week.

### 2.2. Water storages



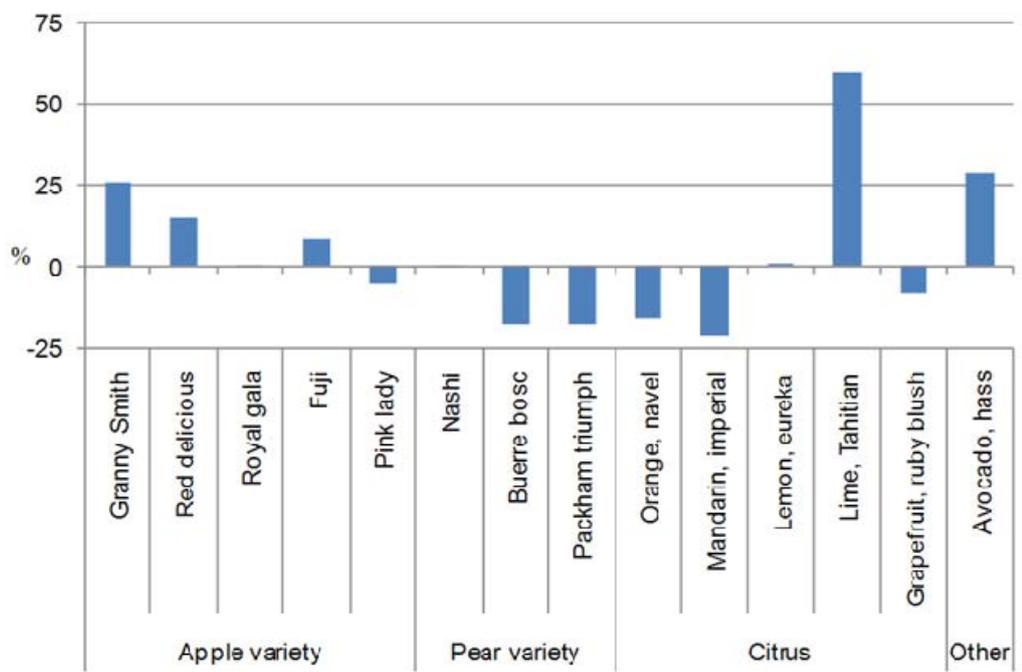
Information on irrigation water available in the Murray–Darling Basin from 1 January 2001 to 28 July 2011 is shown above. The green line indicates the storage level at the same time last year. The orange line indicates the amount of 'dead' or unusable storage.

## 3. Commodities

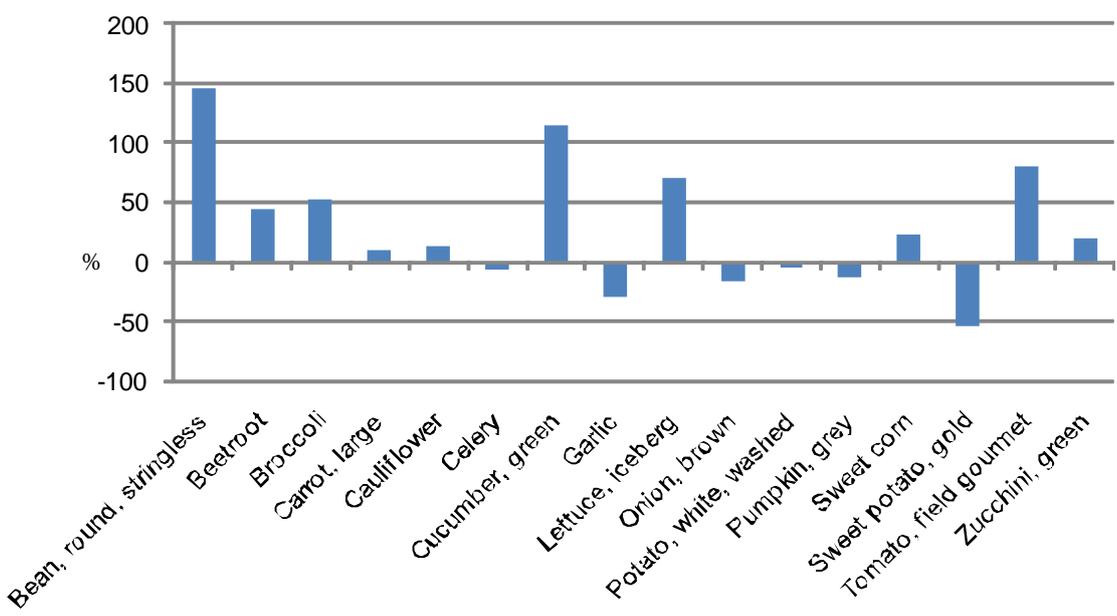
### 3.1. Production and commodities

- Most fruit prices were steady or declined in the week ending 23 July 2011. Banana prices continued to decline, despite recent cooler weather in north Queensland that has slowed plant growth and fruit ripening. Prices of avocados and most apple prices were higher than a year ago, but citrus and pear prices were generally lower (figure A).
- Prices of bean, broccoli and lettuce were sharply higher in the week ending 23 July 2011. Vegetable prices were generally higher than a year ago, though potato, pumpkin, lettuce, sweet potato and brown onions were lower (figure B).
- The world wheat indicator price (US Hard Red Winter, free-on-board Gulf ports) averaged US\$316 a tonne for the week ending 26 July 2011 compared with US\$311 in the previous week.
- The world coarse grains indicator price (US no. 2 yellow corn, free-on-board, Gulf ports) averaged US\$306 a tonne for the week ending 27 July 2011, a 2 per cent fall from the previous week.
- The Australian canola price (Portland, Victoria) decreased 6 per cent to A\$542 a tonne in the week ending 25 July 2011 compared with the previous week. This reflects the good growing conditions in the eastern states and improved conditions in Western Australia.
- Saleyards prices for young cattle for the week ending 22 July 2011 were generally lower. In Queensland, prices fell by 6 per cent to 360 cents a kilogram (dressed weight), while smaller falls were recorded in New South Wales, Victoria and South Australia. However, young cattle prices across all states remain higher than the same time last year, by an average of 10 per cent.
- Saleyards sheep prices were mixed for the week ending 22 July 2011, with prices averaging higher week on week in South Australia and Western Australia but falling in New South Wales and Victoria. Sheep yardings in reported saleyards in the eastern states fell by 23 per cent compared with the previous week, but increased by 76 per cent in Western Australia after a relatively low throughput in the previous week.
- Saleyards lamb prices generally rose in the eastern states for the week ending 22 July 2011 in response to lamb yardings decreasing by 20 per cent compared with the previous week. In Western Australia, lamb prices averaged 2.3 per cent lower at 645 cents a kilogram, despite another week of relatively low lamb saleyard throughput. Recent rain in Western Australia has resulted in lower lamb availability for slaughter.
- Australian milk production increased year on year by 0.5 per cent in June 2011. Milk production rose by 0.9 per cent to 9102 million litres over the twelve months to June 2011.
- The nearby futures contract (December 2011) for cotton on the Intercontinental Exchange closed at US99.46 cents a pound on 15 Jul 2011, the first close under US100 cents a pound since January 2011. This fall was the sixth straight weekly loss and the largest weekly decline since October 2008.

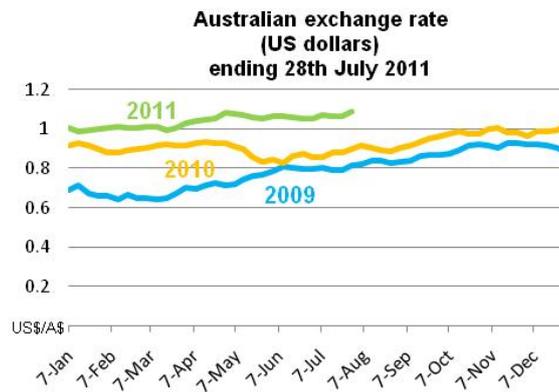
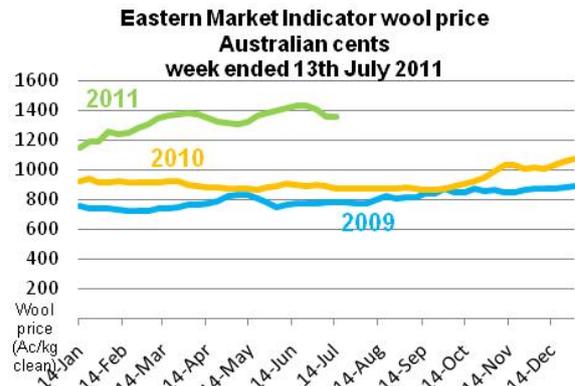
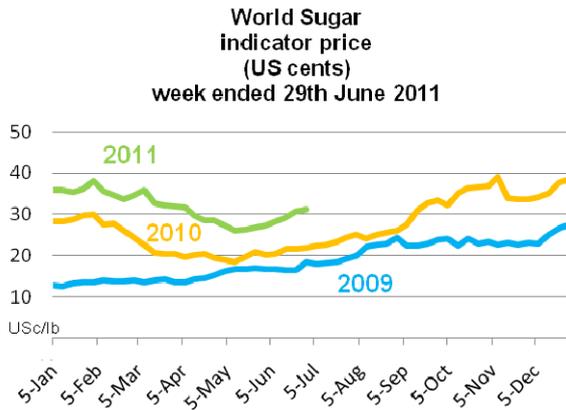
**Figure A. Fruit price changes, 23 July 2011, compared with same time in 2010, Melbourne wholesale market.**



**Figure B. Vegetable price changes, 23 July 2011, compared with same time in 2010, Melbourne wholesale market.**



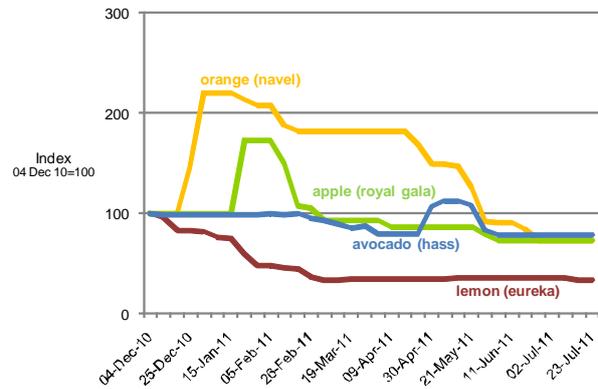
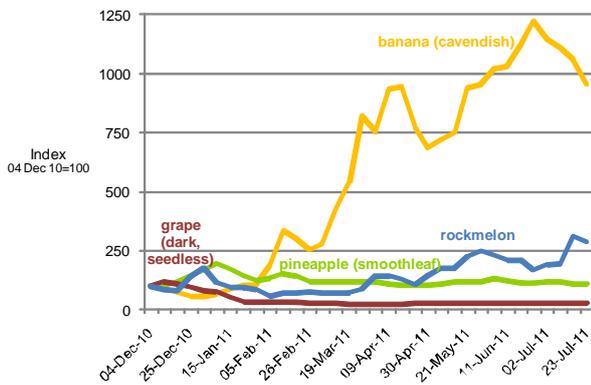
### 3.2. Selected world indicator prices\*



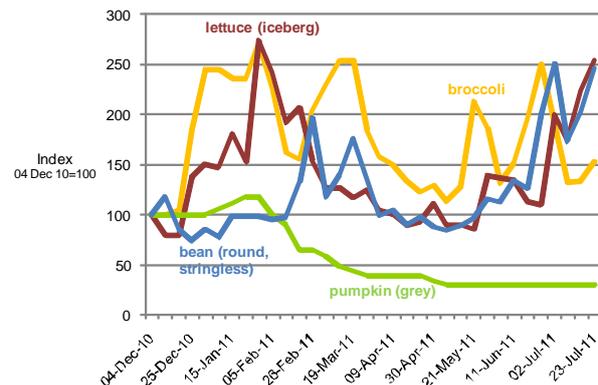
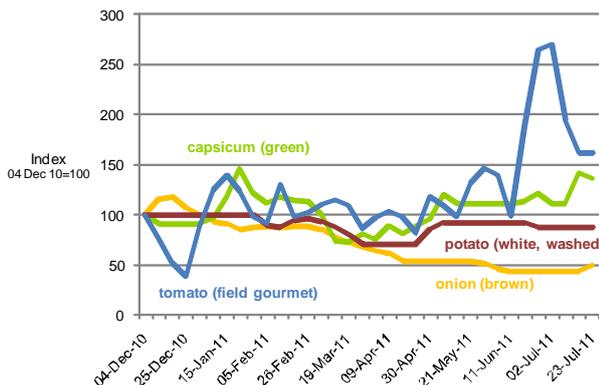
\* The cotton price series has been unquoted since 9 June 2011, but will recommence on 1 August 2011.

### 3.3. Recent movements in fruit and vegetable prices

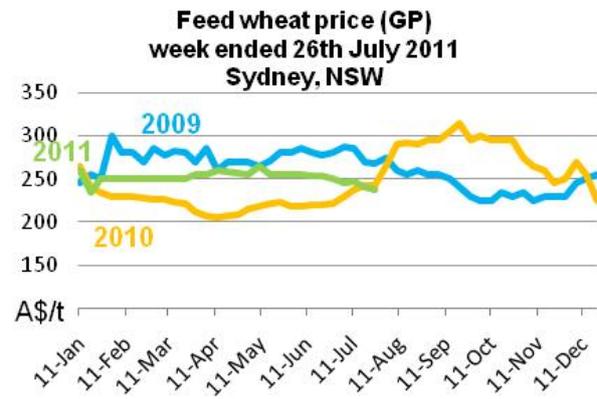
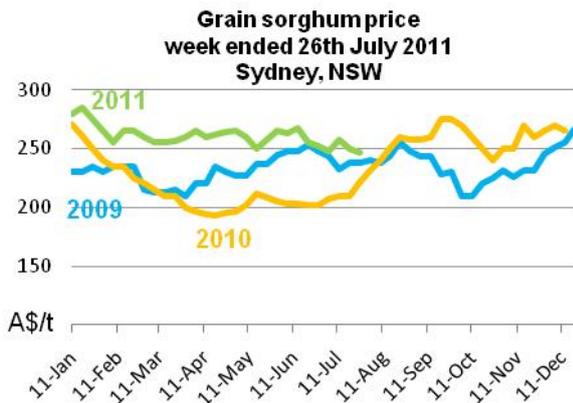
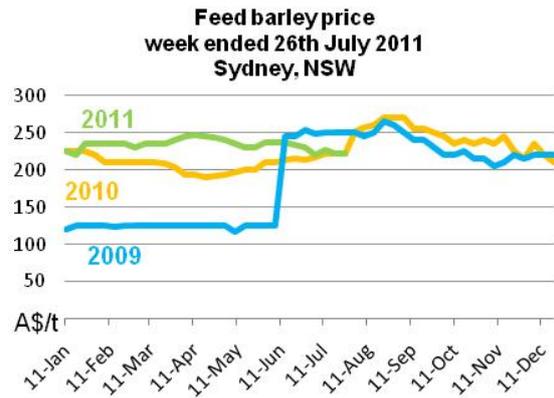
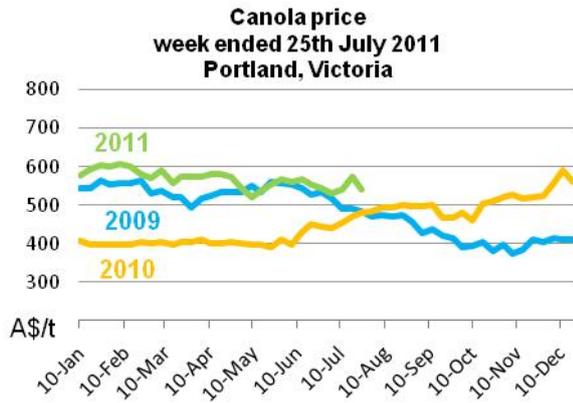
#### Weekly wholesale prices for selected fruit, Melbourne market



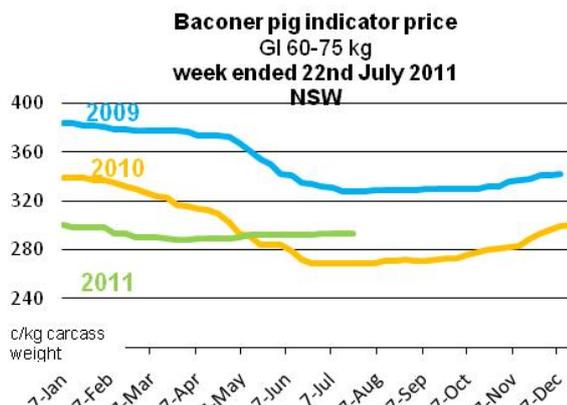
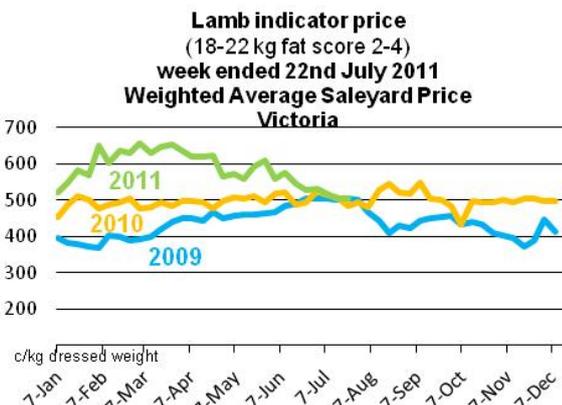
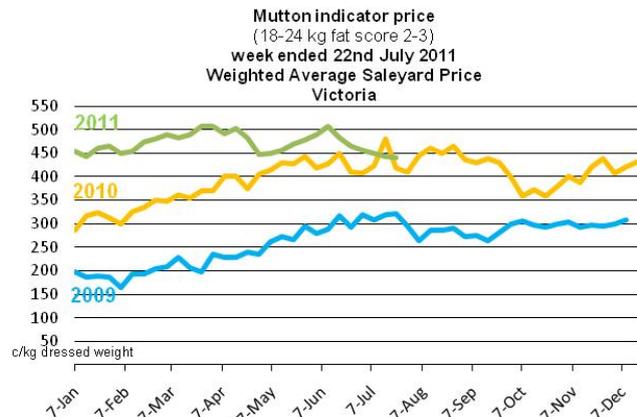
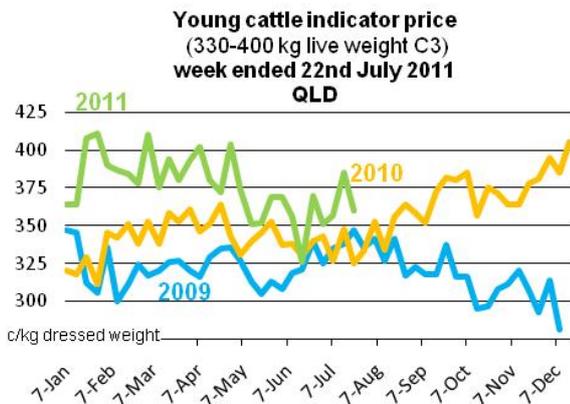
#### Weekly wholesale prices for selected vegetables, Melbourne market



### 3.4. Crop indicator prices



### 3.5. Livestock indicator prices



## 4. Data attribution

### Climate

#### Bureau of Meteorology

- Weekly rainfall totals: [www.bom.gov.au/jsp/awap/rain/index.jsp](http://www.bom.gov.au/jsp/awap/rain/index.jsp)
- Monthly and last 3-months rainfall percentiles: <http://www.bom.gov.au/jsp/awap/>
- Temperature anomalies: <http://www.bom.gov.au/jsp/awap/>
- Rainfall forecast: [www.bom.gov.au/jsp/watl/rainfall/pme.jsp](http://www.bom.gov.au/jsp/watl/rainfall/pme.jsp)
- Seasonal outlook: [www.bom.gov.au/climate/ahead](http://www.bom.gov.au/climate/ahead)
- Drought statement: [www.bom.gov.au/climate/drought/drought.shtml](http://www.bom.gov.au/climate/drought/drought.shtml)
- ENSO Wrap-Up: [www.bom.gov.au/climate/enso/](http://www.bom.gov.au/climate/enso/)
- Soil moisture (BoM, CSIRO and the former Bureau of Rural Sciences): [www.eoc.csiro.au/awap/](http://www.eoc.csiro.au/awap/)

### Water

#### Murray–Darling Basin

- Murray–Darling Basin Authority: [www.mdba.gov.au/water/waterinstorage](http://www.mdba.gov.au/water/waterinstorage)

#### New South Wales

- New South Wales Water Information: <http://waterinfo.nsw.gov.au/>
- New South Wales Office of Water, Department of Environment, Climate Change and Water: [www.water.nsw.gov.au/Home/default.aspx](http://www.water.nsw.gov.au/Home/default.aspx)
- Available water determinations register: [www.wix.nsw.gov.au/wma/DeterminationSearch.jsp?selectedRegister=Determination](http://www.wix.nsw.gov.au/wma/DeterminationSearch.jsp?selectedRegister=Determination)
- Snowy Hydro: [www.snowyhydro.com.au/lakeLevels.asp?pageID=47&parentID=61&grandParentID=4](http://www.snowyhydro.com.au/lakeLevels.asp?pageID=47&parentID=61&grandParentID=4)

#### Queensland

- Sunwater: [www.sunwater.com.au](http://www.sunwater.com.au)
- seqwater: <http://seqwater.com.au>

#### South Australia

- SA Water: [www.sawater.com.au/SAWater/Environment/TheRiverMurray/River+Murray+Levels.htm](http://www.sawater.com.au/SAWater/Environment/TheRiverMurray/River+Murray+Levels.htm)
- South Australian Department of Water: [www.waterforgood.sa.gov.au/](http://www.waterforgood.sa.gov.au/)

#### Victoria

- Goulburn–Murray Water: [www.g-mwater.com.au](http://www.g-mwater.com.au)

#### Water trading

- Waterexchange: [www.waterexchange.com.au](http://www.waterexchange.com.au)

### Commodities

#### Fruit and vegetables

- Datafresh: [www.datafresh.com.au](http://www.datafresh.com.au)

#### Mutton, lambs, wheat, barley and grain sorghum

- The Land: hardcopy or online at <http://theland.farmonline.com.au/markets.aspx>

#### Cattle, mutton, lambs and pigs

- Meat and Livestock Australia: [www.mla.com.au/Prices-and-markets](http://www.mla.com.au/Prices-and-markets)

#### Canola

- Weekly Times: hardcopy