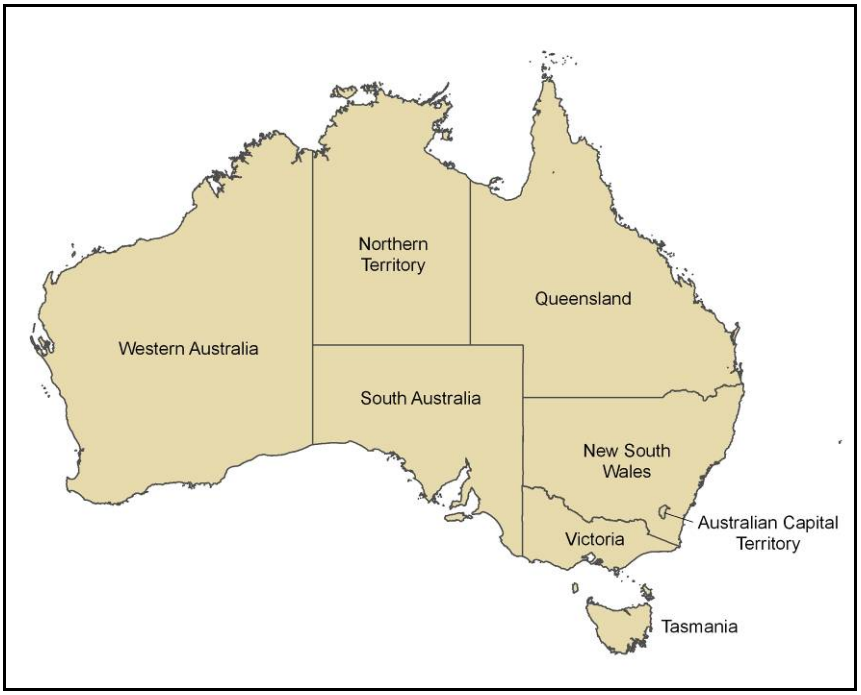
Climate and Agricultural Update

National Report

for the month of

June 2006



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Contributors

Information in this report was sourced from the following organisations:

ORGANISATION	
Bureau of Meteorology	www.bom.gov.au
Bureau of Rural Sciences	www.brs.gov.au
Australian Bureau of Statistics	www.abs.gov.au
Department of Agriculture and Food, Western Australia	www.agric.wa.gov.au
Goulburn Murray Water	www.g-mwater.com.au
Queensland Department of Primary Industries and Fisheries	www.dpi.qld.gov.au
New South Wales Department of Natural Resources	www.dipnr.nsw.gov.au
Meat and Livestock Australia	www.mla.com.au

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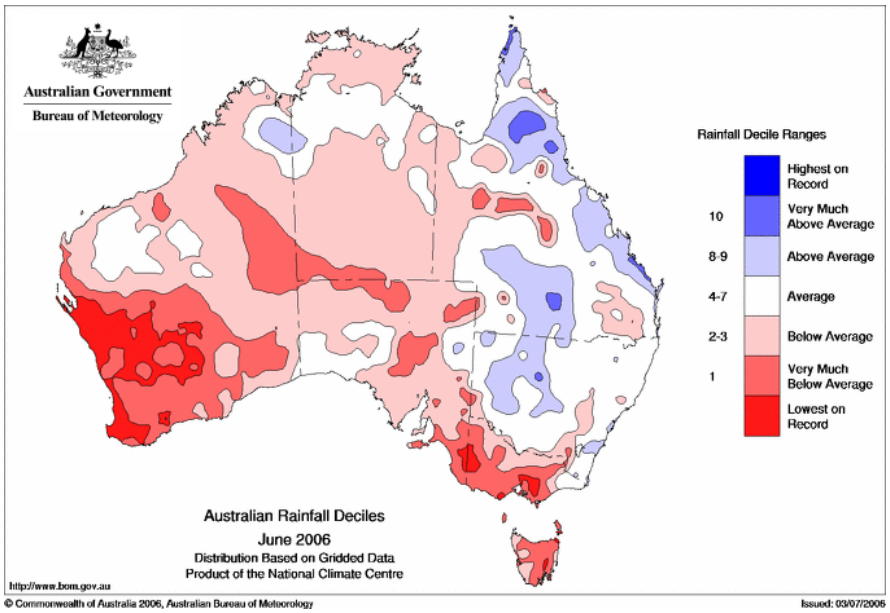
1.0 Rainfall and temperature

1.1 Rainfall

Spatial rainfall analyses are based on historical monthly rainfall data provided by the Bureau of Meteorology. For further information on rainfall data and the interpretation of decile analyses, go to http://www.bom.gov.au/climate/austmaps/

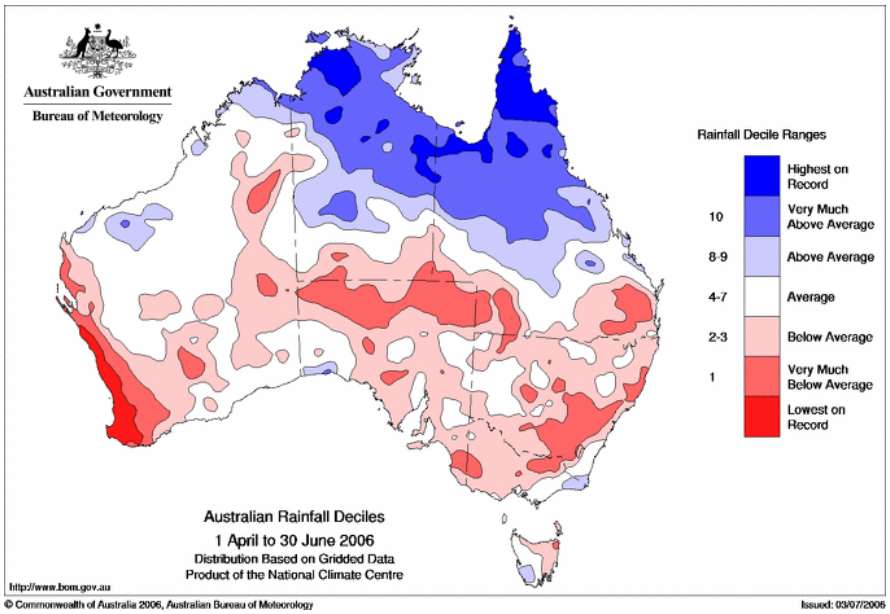
Rainfall over the last month (June 2006)



Rainfall deciles for June 2006.

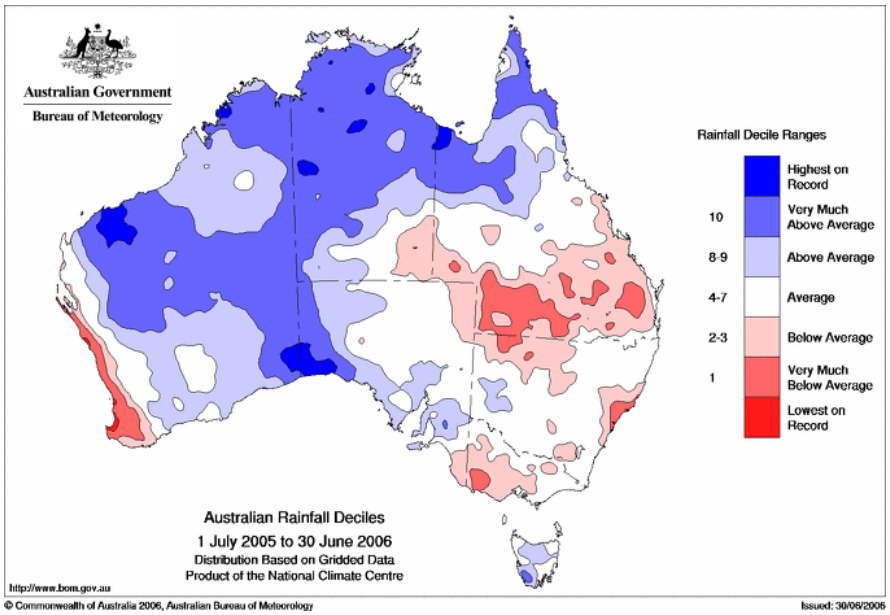
Rainfall during June was generally much lower than expected across the continent, except for parts of New South Wales and Queensland where average to very much above average rainfall occurred. Lowest on record rainfall occurred in a significant area of southern Western Australia and in small parts of Victoria, South Australia and Tasmania.

Ongoing or emerging rainfall situations



Rainfall deciles for the three months ending June 2006.

Rainfall for the last three months (April 2006 to June 2006) was above to very much above average over the north of the Northern Territory and northern Queensland, with significant areas of highest on record rainfall occurring in Cape York, the northwest of Northern Territory and the Gulf of Carpentaria. In contrast, there were significant areas of very much below average to average rainfall in the southern part of the continent. Lowest on record rainfall occurred along the southwest coast of Western Australia.

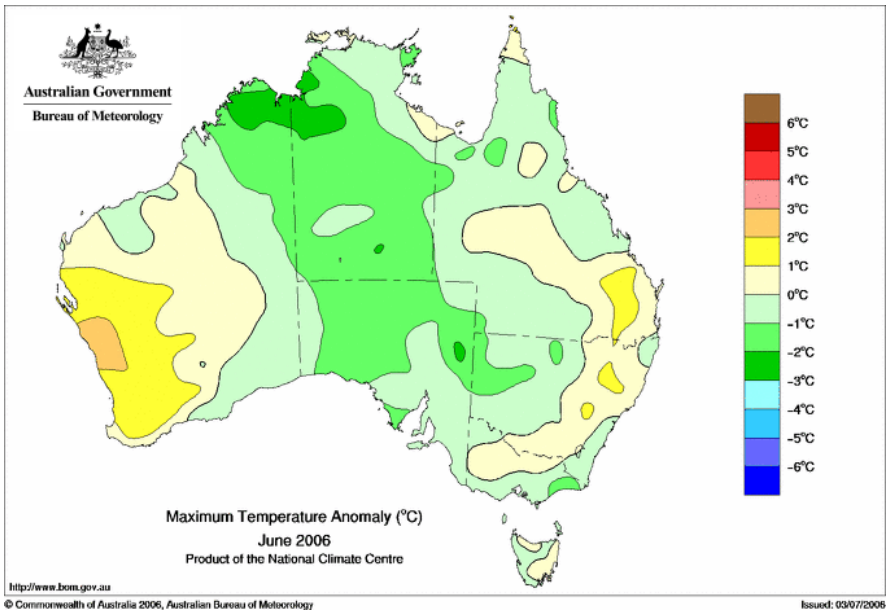


Rainfall deciles for the 12 months ending June 2006.

Over the last 12 months, rainfall was low across the southwest coast of Western Australia, southern Queensland, north western and coastal New South Wales and southwest Victoria. In contrast, the western and central parts of the continent generally received above average to very much above average rainfall over this period.

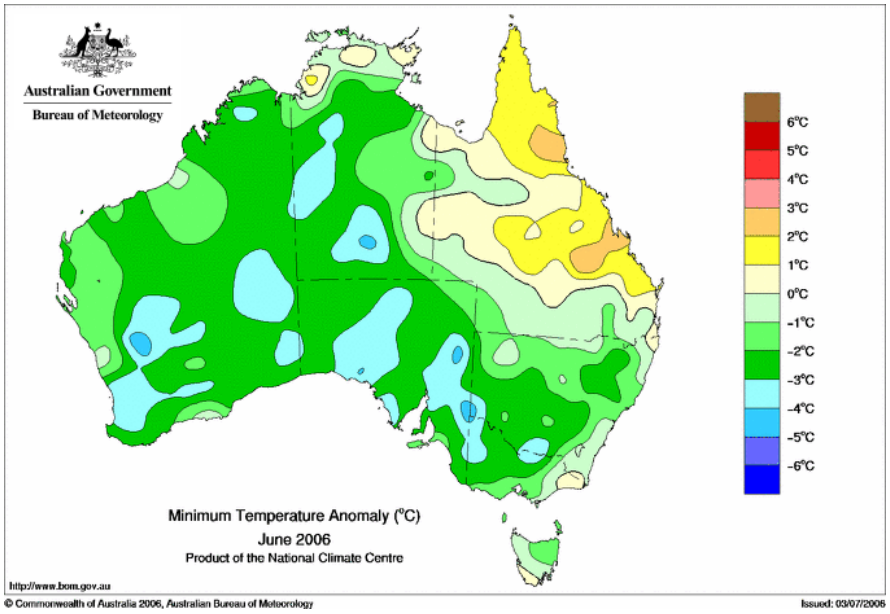
1.2 Maximum and minimum temperature anomalies

Spatial temperature analyses are based on historical monthly 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 with respect to the reference period 1961-1990. For further information on temperature anomalies, go to http://www.bom.gov.au/climate/austmaps/



Maximum temperature anomalies for June 2006.

Maximum temperatures during June were below the long-term average in the central, northern, and south eastern parts of the continent and average to above the long-term average in most of Western Australia and the east coast of Australia.

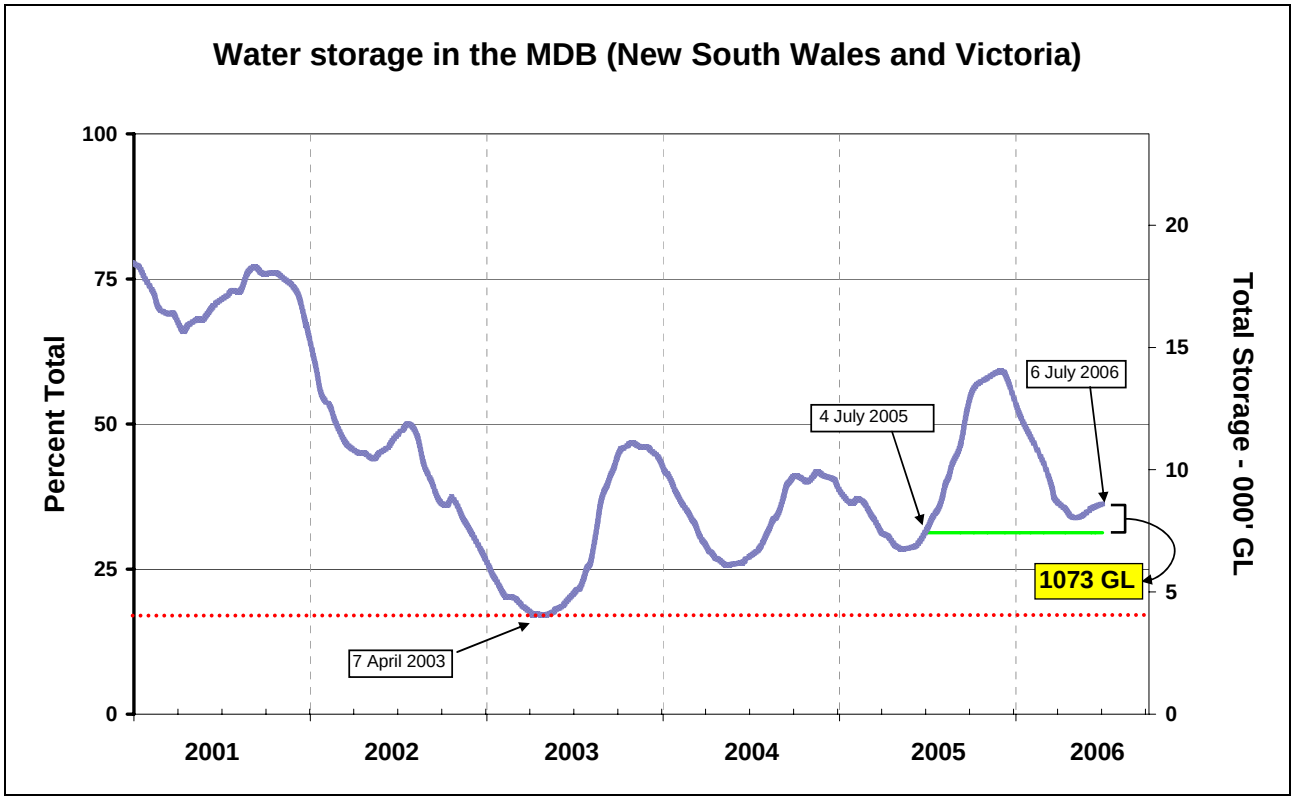


Minimum temperature anomalies for June 2006.

Minimum temperatures during June were below to well below the long-term average across most of Australia, apart from Northern Queensland where minimum temperatures were above average.

2.0 Water storages and irrigation allocations

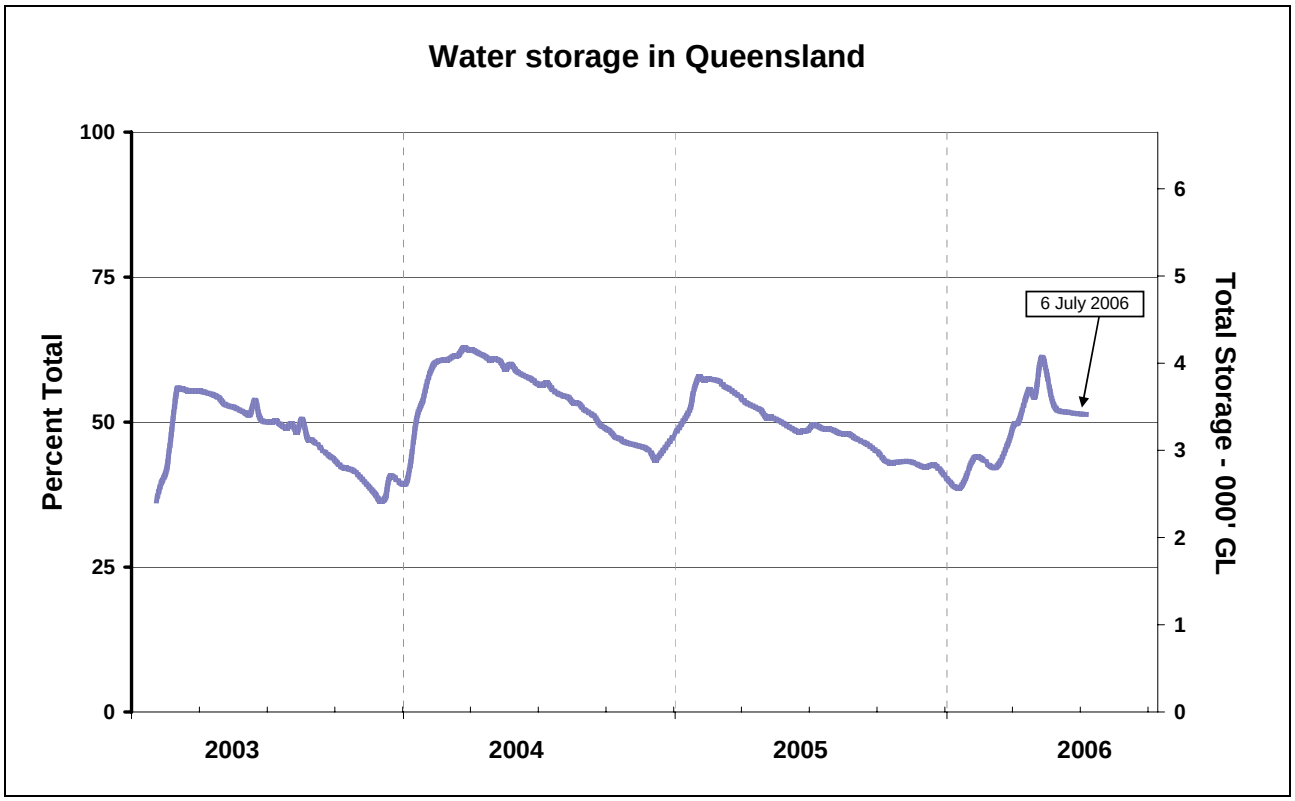
2.1 Water storages (current to 6 July 2006)



Irrigation water available in the Murray-Darling Basin from 1 January 2001 to 6 July 2006. The green line indicates the storage level at the same time last year. Source: Bureau of Rural Sciences.

Storage levels for irrigated agriculture in the Murray-Darling Basin are at 7,793 GL (total capacity of 21,492 GL), which is approximately 36.3% of total capacity and represents an increase of approximately 0.5 % of total capacity (110 GL) in the last month. Current storage levels are approximately 1,073 GL greater than at the same time last year, which is equivalent to an increase of 5.0% of total capacity.

The storage levels of the Murray-Darling Basin discussed above do not include the water contained in Lake Eucumbene, Tantangara Reservoir and Lake Jindabyne, which represent 5700 GL of total capacity and are used for hydro-electricity generation and irrigation purposes. These storages currently hold 1881 GL (33% of capacity) of water, which represents a decrease of 575 GL from April 2006.



Current water storage level in Queensland as of 6 July 2006. Source: Bureau of Rural Sciences.

Storage levels in Queensland are at 3,573 GL (total capacity of 6,965 GL), which is approximately 51% of total capacity and represents a decrease of approximately 1.0 % of total capacity (24 GL) in the last month. Current storage levels are approximately 123 GL greater than at the same time last year, which is equivalent to an increase of 2.0% of total capacity.

2.2 Irrigation allocations for the 2005/06 season

Allocation Outlook for Victorian irrigators in the 2006/07 season (current to 3 July 2006)

- Currently, in the Goulburn, Campaspe and Loddon systems, there is no allocation for irrigation entitlements. Water reserves from last season in these systems are insufficient to meet all losses and fixed commitments. In the Murray system the allocation is 76% of Water Right and Licensed Volume. In the Broken system, the allocation is 37% of Licensed Volume. The next allocation announcement is scheduled for Monday 17 July 2006.

- Exceptionally dry conditions have been experienced in all systems since the end of the 2005/06 irrigation season. There has been very little recovery in storage levels and many storages remain at very low levels. The outlook has been adjusted with the current seasonal condition. An allocation of 100% or better as of February 2007 of Water Right and Licensed Volume is the likely outcome for the Murray and

Broken Systems. However, there is a 4 in 10 chance that February allocations will be less than 100% for the Goulburn, Campaspe and Loddon systems.

- With the current storage levels, allocations in the coming season will again depend on inflows in the coming winter-spring months, particularly the normal high inflow months July to October.

Allocation Outlook for New South Wales irrigators in the 2006/07 season (current to 15 June 2006)

- Using all years in the analysis, there is a 9 in 10 chance that allocations for Murray Valley irrigators will reach 15% by November, 28 % by March and 30 % by June. There is a 3 in 4 chance that 30 % will be available in November, 42 % by March and 49 % by June and a 1 in 2 chance that 45 % will be available in November, 100 % by March and 100 % by June. Users should be aware that these probabilities are indicative only.

- There is a 9 in 10 chance that allocations for the Murrumbidgee irrigators will be 31% by November, a 3 in 4 chance that 41 per cent will be available in November and a 1 in 2 chance that 62 per cent will be available.

For further information on irrigation allocations, go to:

Goulburn-Murray Water

http://www.g-mwater.com.au/news.asp?ContainerID=media_releases

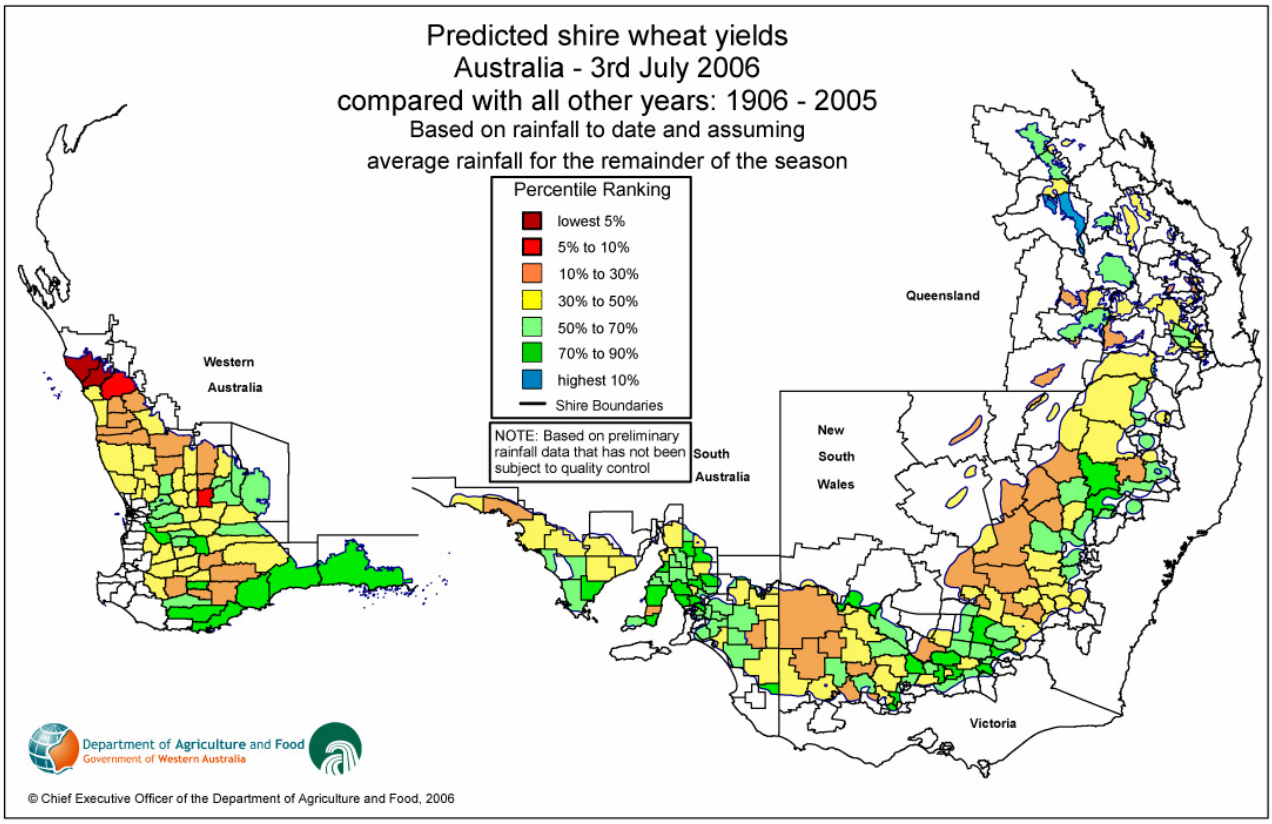
New South Wales Department of Natural Resources

http://www.naturalresources.nsw.gov.au/mediarelnr/mm20060418_3331.html

3.0 Crop and livestock production

3.1 Crops

Predicted wheat yields are provided by the Western Australian Department of Agriculture and Food. The following figure shows wheat yield forecasts as percentiles of a 100-year historic data set. For further information on predicted wheat yields, go to www.agric.wa.gov.au/.



Predicted shire wheat yields for the 2006 cropping season ranked relative to all years (1906-2005) as of 3 July 2006.

Initial predictions for shire level wheat yields for the 2006 growing season are highly variable reflecting the dry start to the winter cropping season. Wheat yields in the inland and southern wheat belt of New South Wales, the western wheat belt of Victoria, and large parts of the wheat belt of Western Australia are predicted to be below average. A small area in the northern wheat belt of Western Australia is predicted to be in the lowest 10% of historic yields. Above average yields are predicted for parts of South Australia, northeast Victoria into southern New South Wales and parts of Queensland. A small area in the northern wheat belt of Queensland is predicted to be in the highest 10% of yields.

3.2 Livestock

- Below average rainfall across large parts of eastern Australia over the summer and autumn period has caused deterioration in pasture condition.
- The Eastern Young Cattle Indicator (EYCI) (an indicator of general cattle markets) has continued to rise until June 2006, but remains 11.5 c/kg lower than June 2005. In June 2005 widespread rainfall prompted renewed confidence which assisted re-stocker demand. However, this year the rainfall has not been as widespread, with a higher percentage of young cattle being sold due to earlier weaning because of seasonal constraints on cows.
- Lamb numbers fell towards the end of June 2006, due to rainfall in late June in NSW and Victoria, combined with heavy frosts and low temperatures. Figures released by the Australian Bureau of Statistics this month have shown that lamb slaughter rates were higher than May 2005. This increase can be largely attributed to the dry seasonal conditions across much of the eastern states, along with medium trade lamb prices, which saw farmers turn their lambs off early compared with 2004 and 2005.
- Higher stock turn-off in WA (Australia's main source of live sheep exports) due to poor seasonal conditions in autumn 2006 will result in an increase in the availability of sheep for export in 2006-07. As a result, ABARE has forecast exports of live sheep in 2006-07 to increase 13%, to 4.5 million head.

For further information go to:

Australian Bureau of Statistics

http://www.abs.gov.au

ABARE Australian Crop report and ABARE Australian Commodities forecast and issues

http://abareonlineshop.com/

Meat and Livestock Australia

http://www.mla.com.au/

Department of Agriculture Western Australia

http://www.agric.wa.gov.au/

New South Wales Department of Primary Industries

http://www.agric.nsw.gov.au/reader/nsw-grains-report-sept-2005

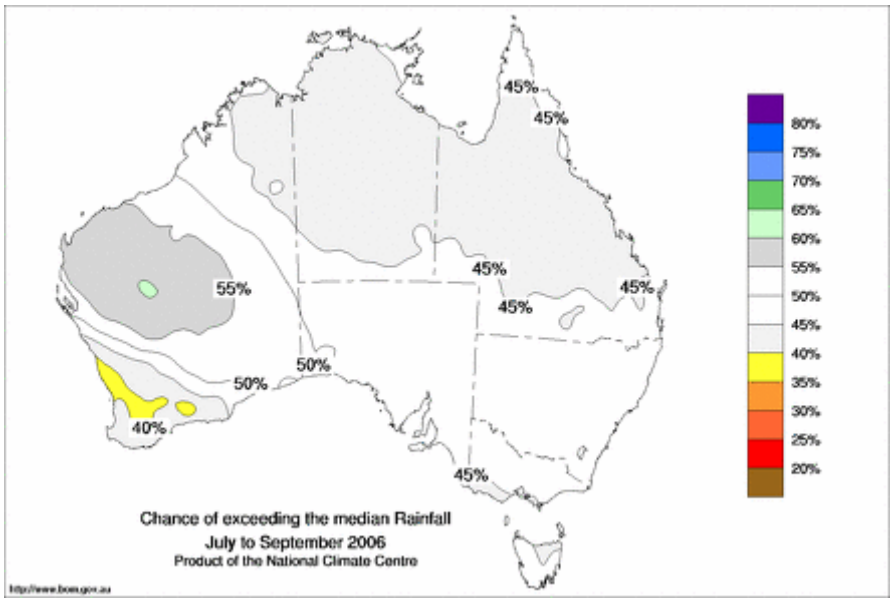
Queensland Department of Primary Industries and Fisheries.

http://www.dpi.qld.gov.au/fieldcrops/

4.0 Climate Outlook

4.1 Rainfall Outlook

The Bureau of Meteorology provides seasonal outlooks that are statements about the probability of wetter or drier than average weather over a three-month period. The outlooks are based on the statistics of chance (the odds) taken from Australian rainfall/temperatures and sea surface temperature records for the tropical Pacific and Indian Oceans. They are not, however, categorical predictions about future rainfall, and they do not indicate the expected rainfall amount for the three-month outlook period. For further information on this rainfall outlook, go to http://www.bom.gov.au/climate/ahead/rain_ahead.shtml



Seasonal Outlook: the chance of exceeding median rainfall between July 2006 and September 2006.

Seasonal rainfall probabilities released by the Bureau of Meteorology indicate that there is moderate shift in the odds towards below average rainfall for the July to September period for south-west Western Australia. There is an increased chance of receiving above average rainfall in a small part of the Gascoyne in Western Australia; while for the remainder of Australia, the chances of average rainfall over the next 3 months is close to 50%.

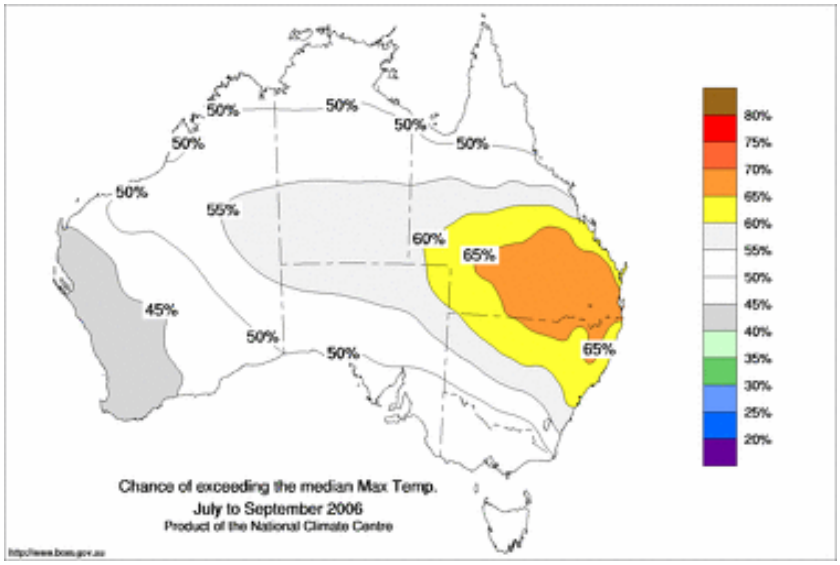
4.2 El Niño & Southern Oscillation Index

The Bureau of Meteorology is stating that the Pacific Ocean has continued to slowly warm through June, due to weaker than normal trade winds. This has resulted in slightly above average temperatures in the central Pacific with only very small regions of cooler than normal waters along the South American coast. The atmospheric response to this warming has been reflected in the increase in cloudiness in the central Pacific, although cloudiness is currently close to average. The Southern Oscillation Index (SOI) had a value of minus 8 at the end of June.

Despite the negative SOI other ENSO indicators show only weak trends. Predictions of Pacific Ocean temperatures from Australian and international computer models suggest neutral conditions will persist through the southern spring and into summer. In addition,

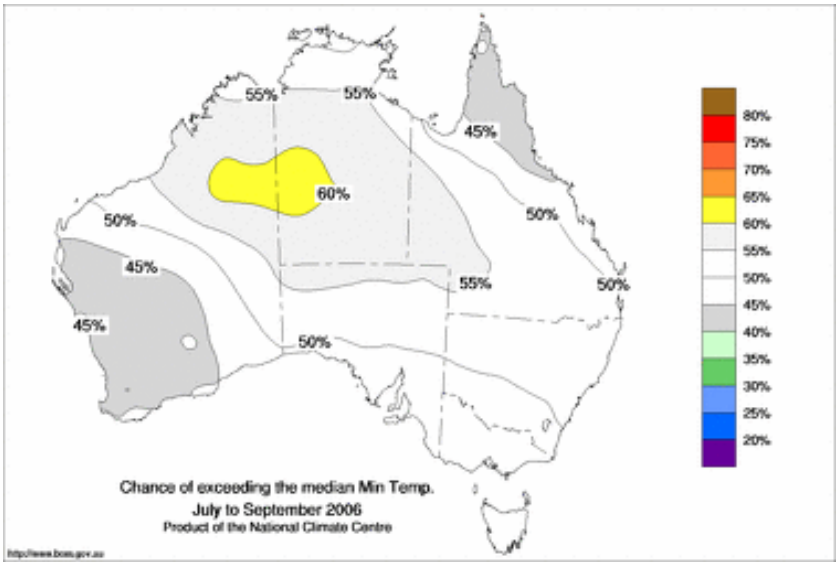
because ENSO events typically begin to evolve between March and June, the risk of the Pacific warming to levels high enough for an El Nino event to develop this year is low.

4.3 Temperature Outlook



Seasonal Outlook: the chance of exceeding median maximum daytime temperatures between July 2006 and September 2006.

For the July to September 2006 period northern New South Wales and southern Queensland show a tendency towards above average maximum temperatures. There is no strong tendency towards above or below average maximum temperatures across the remainder of Australia for that period.



Seasonal Outlook: the chance of exceeding median minimum daytime temperatures between July 2006 and September 2006.

There is an increased chance of above average minimum temperatures in an area which straddles the Northern Territory/Western Australia border. There is no strong tendency towards above or below average minimum temperatures across the remainder of Australia for that period.

For further information on the Bureau of Meteorology seasonal outlooks, go to http://www.bom.gov.au/climate/ahead/