NAMS
NATIONAL AGRICULTURAL MONITORING SYSTEM

Climate and Agricultural Update

National Report

for the month of

July 2006

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Contributors

The 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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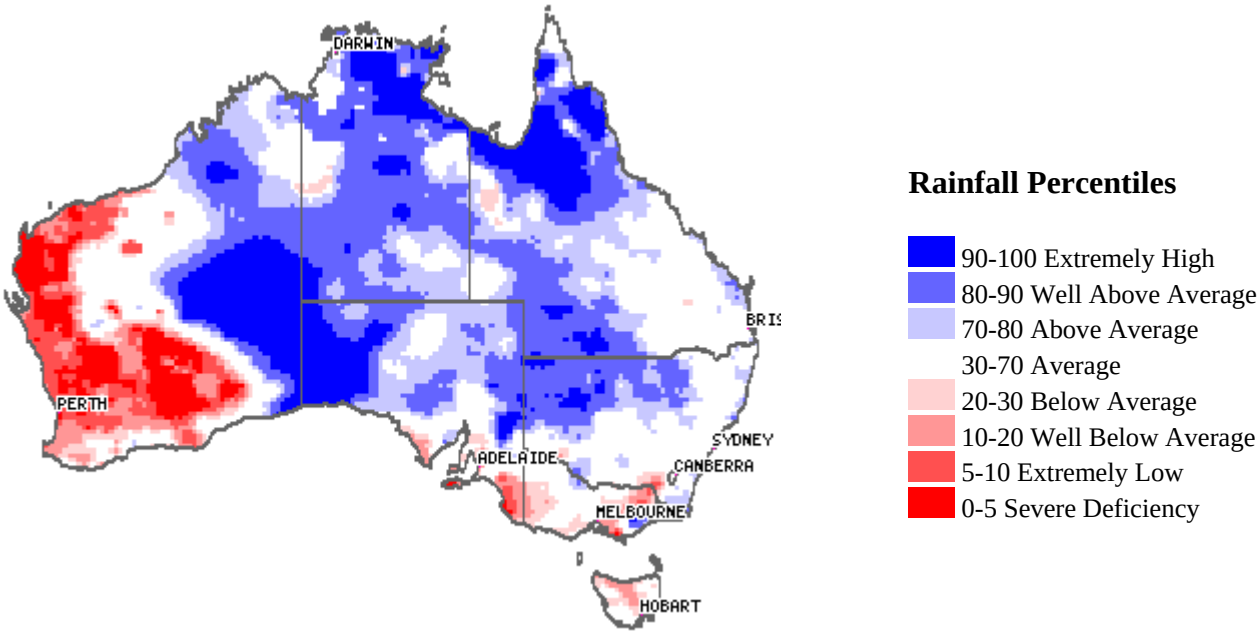
1.0 Rainfall and temperature

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 percentile analyses, go to http://www.bom.gov.au/climate/austmaps/.

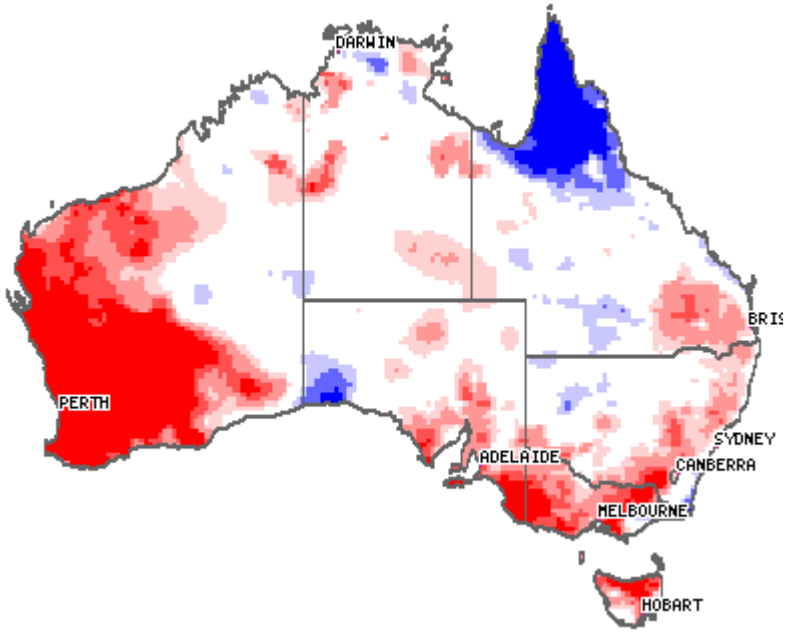
Rainfall over the last month (July 2006)



Rainfall percentiles for July 2006

Rainfall during July was generally average to very much above average across the central and northern parts of the continent, with below average to severe deficiencies occurring across parts of coastal South Australia and Victoria, and across significant parts of Tasmania and Western Australia.

Ongoing or emerging rainfall situations

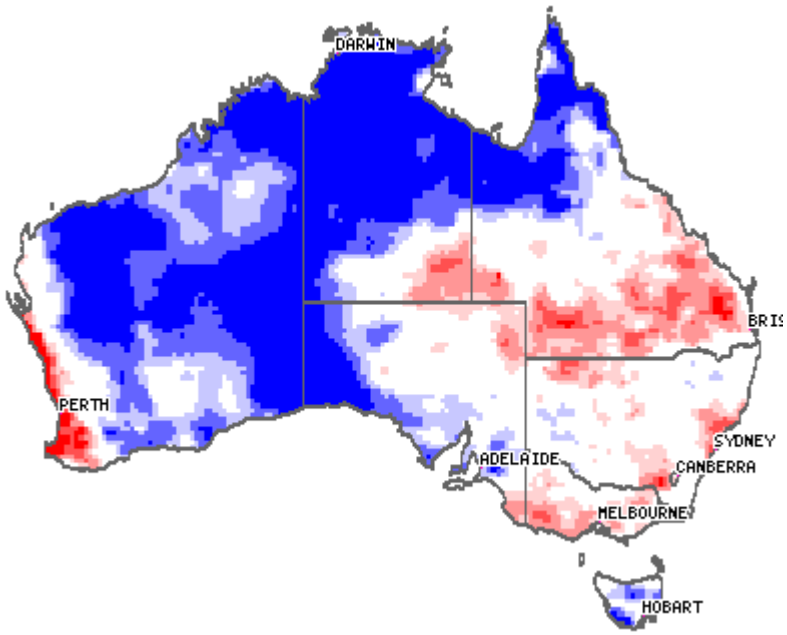


Rainfall Percentiles

- 90-100 Extremely High
- 80-90 Well Above Average
- 70-80 Above Average
- 30-70 Average
- 20-30 Below Average
- 10-20 Well Below Average
- 5-10 Extremely Low
- 0-5 Severe Deficiency

Rainfall percentiles for the three months
May 2006 - July 2006

Rainfall for the last three months (May 2006 to July 2006) ranged from below average to severely deficient across much of Western Australia, Victoria and Tasmania and across parts of South Australia, New South Wales and Queensland. The Cape York region in Queensland was the only significant part of Australia to receive above average to extremely high rainfall over the last three months.



Rainfall Percentiles

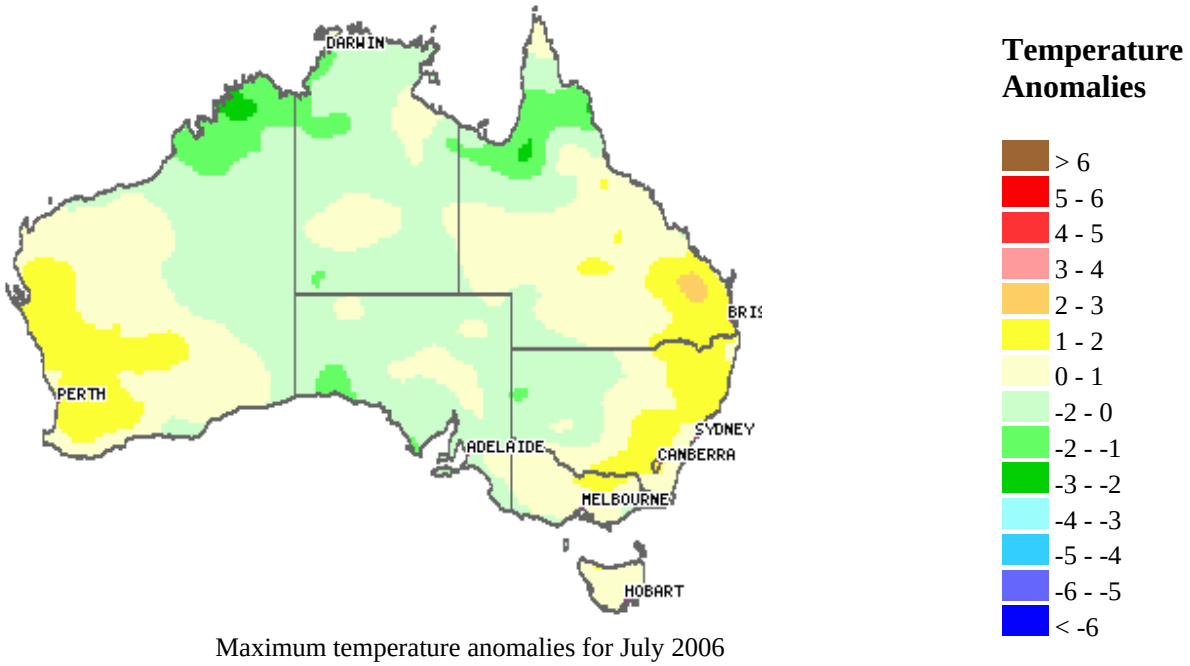
- 90-100 Extremely High
- 80-90 Well Above Average
- 70-80 Above Average
- 30-70 Average
- 20-30 Below Average
- 10-20 Well Below Average
- 5-10 Extremely Low
- 0-5 Severe Deficiency

Rainfall percentiles for the 12 months
August 2005 - July 2006

Over the last 12 months, significant areas of below average to severe rainfall deficiencies occurred across southeast Australia, southern Queensland and the coastal regions in southern Western Australia. In contrast, the western and central parts of the continent and Tasmania generally received above average to very much above average rainfall over this period.

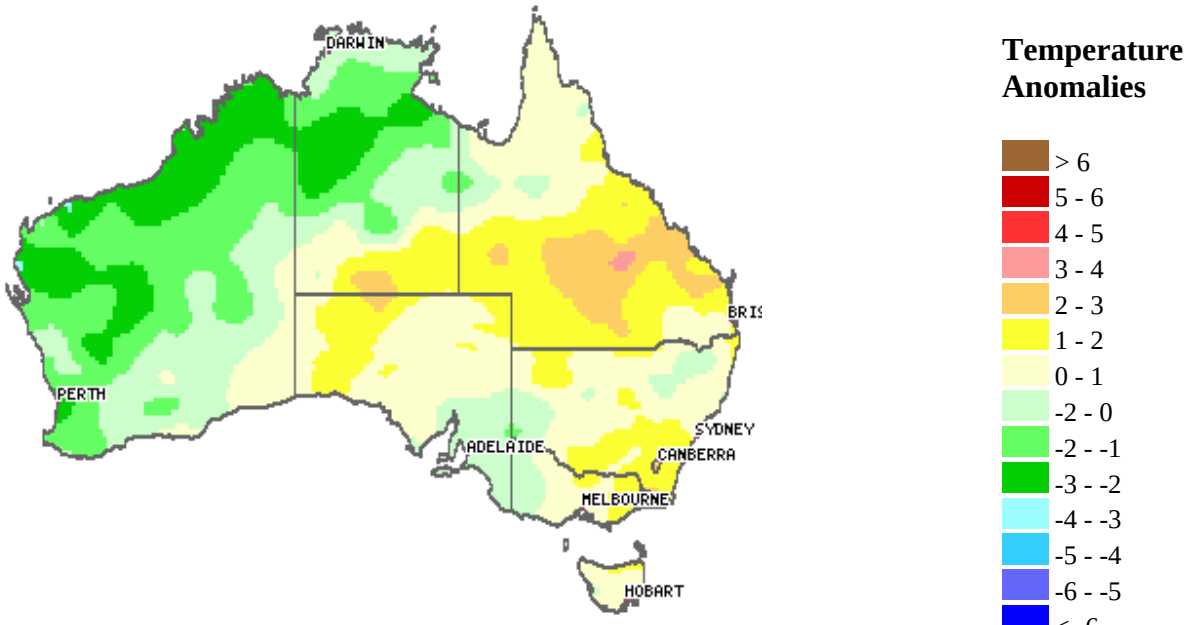
1.2 Maximum and minimum temperature anomalies

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 July 2006

Maximum temperatures during July were mostly below the long-term average in the central, northern and southern parts of the continent and average to above the long-term average in the southwest of Western Australia and the east coast of Australia.

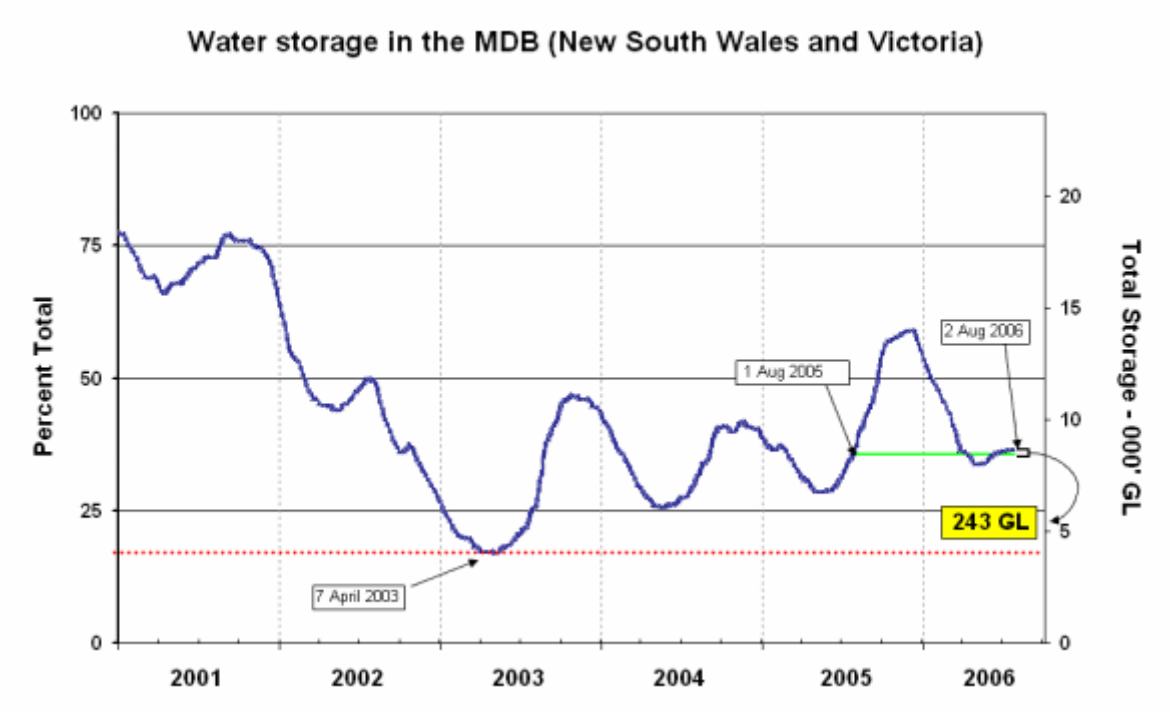


Minimum temperature anomalies for July 2006

Minimum temperatures during July were generally below to well below the long-term average across the west and northwest parts of the continent. In contrast, the east and northeast parts of the continent were generally average to well above average.

2.0 Water storages and irrigation allocations

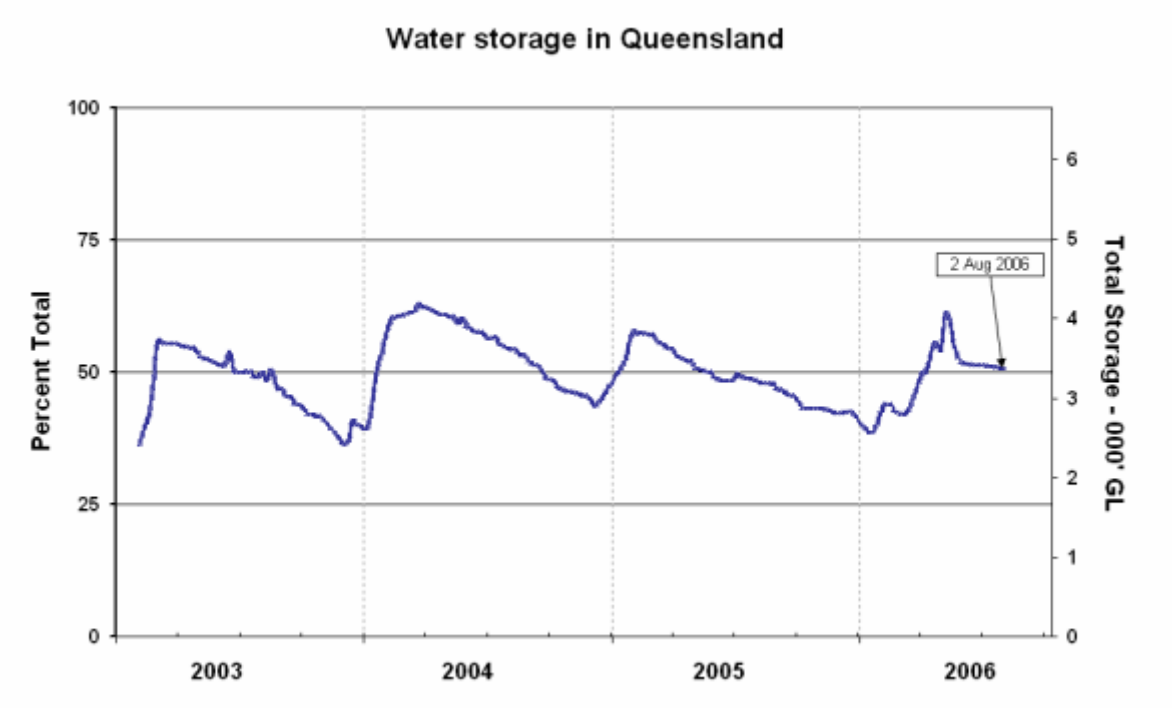
2.1 Water storages (current to 2 August 2006)



Irrigation water available in the Murray-Darling Basin from 1 January 2001 to 31 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 7,875 GL (total capacity of 21,492 GL), which is approximately 36.6% of total capacity and represents an increase of approximately 0.4 % of total capacity (83 GL) in the last month. Current storage levels are approximately 243 GL greater than at the same time last year, which is equivalent to an increase of approximately 1.0% 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 1686 GL (29% of capacity) of water, which represents a decrease of 334 GL from June 2006.



Current water storage level in Queensland as of 31 July 2006. Source: Bureau of Rural Sciences

Storage levels in Queensland are at 3,537 GL (total capacity of 6,965 GL), which is approximately 51% of total capacity and represents no significant change to last month. Current storage levels are approximately 154 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 in the Broken system, the allocation is 37%.

- An allocation of 100% or better as of February 2007 of Water Right is the likely outcome for the Murray and Broken Systems. According to Goulburn-Murry Water there is a 4 in 10 chance that February allocations will be less than 100% for the Goulburn, Campaspe and Loddon systems.

- 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.

- With the current storage levels, allocations in the coming season will 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 17 July 2006)

- There is currently no general water allocation for the Murray system. According to the New South Wales Department of Natural Resources there is a 9 in 10 chance that water allocations will reach 4% by November, 21% by March and 29% by June; a 3 in 4 chance that a 23% allocation will be available in November, 34% by March and 40% by June; and a 1 in 2 chance that a 39% allocation will be available in November and 100% in March. These probabilities are based the catchments receiving average rainfall over the irrigation season.

- General water allocations for the Murrumbidgee Valley are currently at 18% of water right. According to the New South Wales Department of Natural Resources there is a 9 in 10 chance that water allocations will reach 32% by the end of October, 40% by the end of February and 43% by the end of April; a 3 in 4 chance that water allocations will reach 41% by the end of October, 50% by the end of February and 54% by the end of April; and a 1 in 2 chance that water allocations will reach 55% by the end of October, 71% by the end of February and 72% by the end of April. These probabilities are based the catchments receiving average rainfall over the irrigation season.

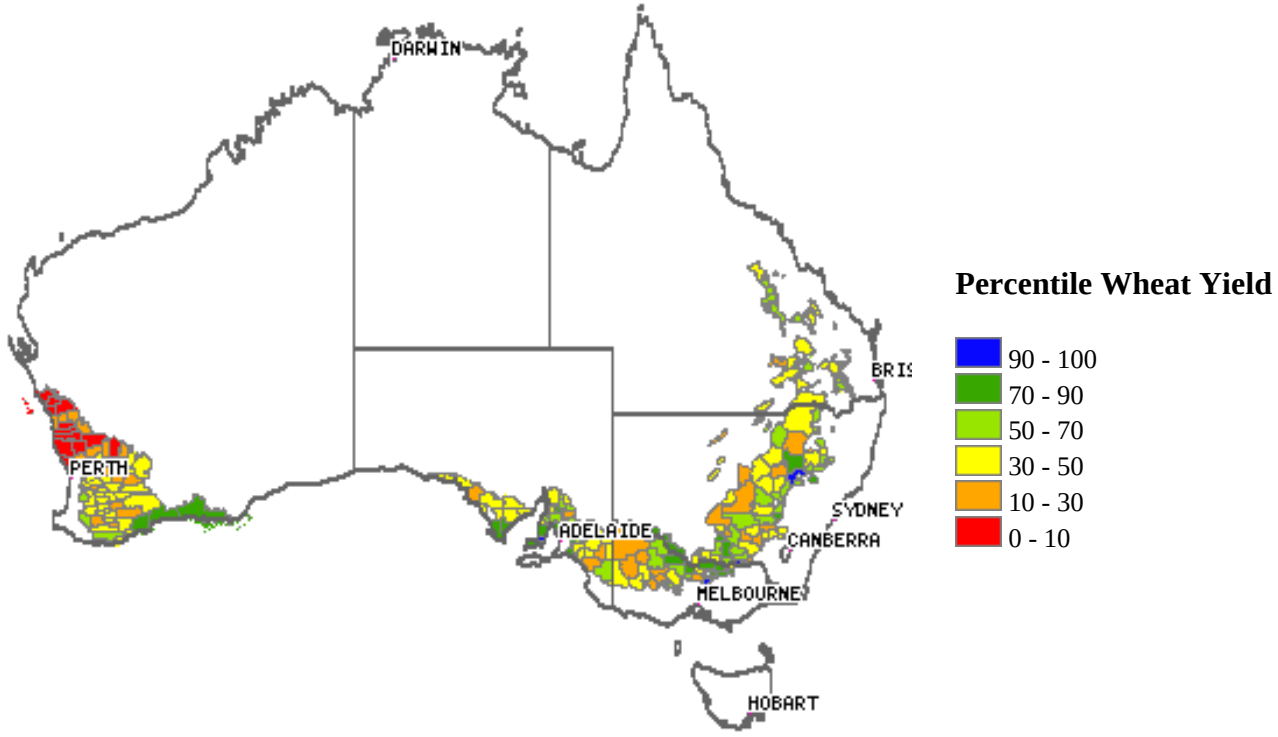
For further information on irrigation allocations, go to:
Goulburn-Murray Water
http://www.g-mwater.com.au/news.asp?ContainerID=media_releases

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)

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 wheat belt of New South Wales, the western wheat belt of Victoria, large sections of the wheat belt of South Australia and 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 the southern wheat belt of Western Australia, parts of South Australia, northeast Victoria into southern and eastern New South Wales and small parts of Queensland. Small areas in South Australia, eastern Victoria and eastern New South are 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.

- Year-to-date grown steer numbers are 21% lower than the same period last year, due to more cattle being sold at an earlier age (due to dry seasonal conditions for much of the year), along with the increasing trend of cattle being backgrounded for feedlots. Figures released by the Australian Bureau of Statistics this month have shown that beef and veal production was 4% lower in 2005-06 compared to 2004-05 levels.

- July lamb yardings in NSW and SA were below the five-year July average by 12% and 6%, respectively, due to the deteriorating seasonal conditions during summer and autumn, forcing lambs to be turned off earlier. Although Victoria yardings were lower than July last year, they were up 13% compared to the five-year average. Figures released by the Australian Bureau of Statistics this month have shown that lamb slaughter rates were higher in 2005-06 than the previous financial year. This increase can be partially 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/

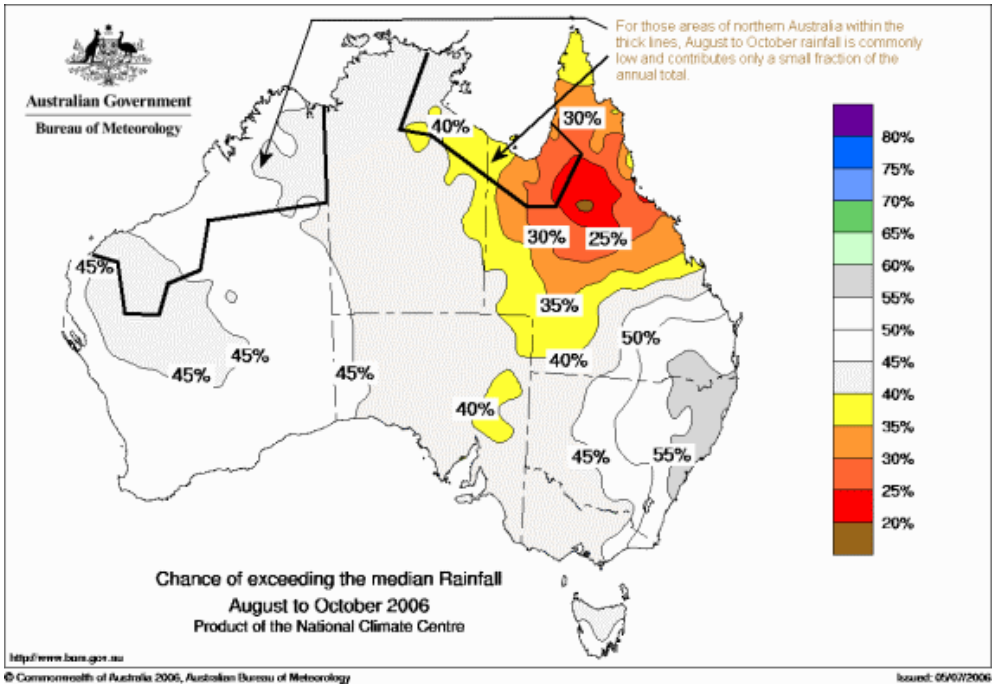
New South Wales Department of Primary Industries
http://www.agric.nsw.gov.au/reader/nsw-grains-report-june-2006

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 of 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.



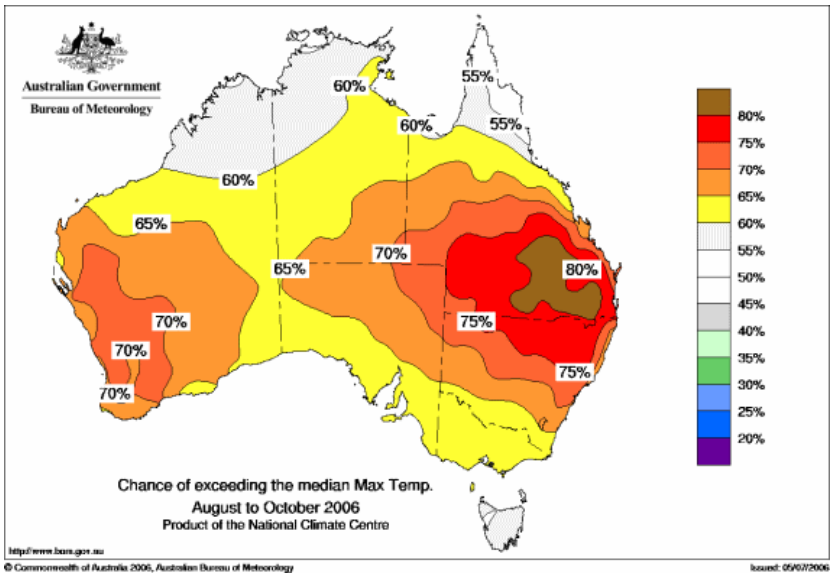
Seasonal rainfall probabilities released by the Bureau of Meteorology indicate that there is moderate to strong shift in the odds towards below normal rainfall for the August to October period across north eastern Australia. Across the remainder of the country, there is no indication of above or below average rainfall.

4.2 El Nino & Southern Oscillation Index

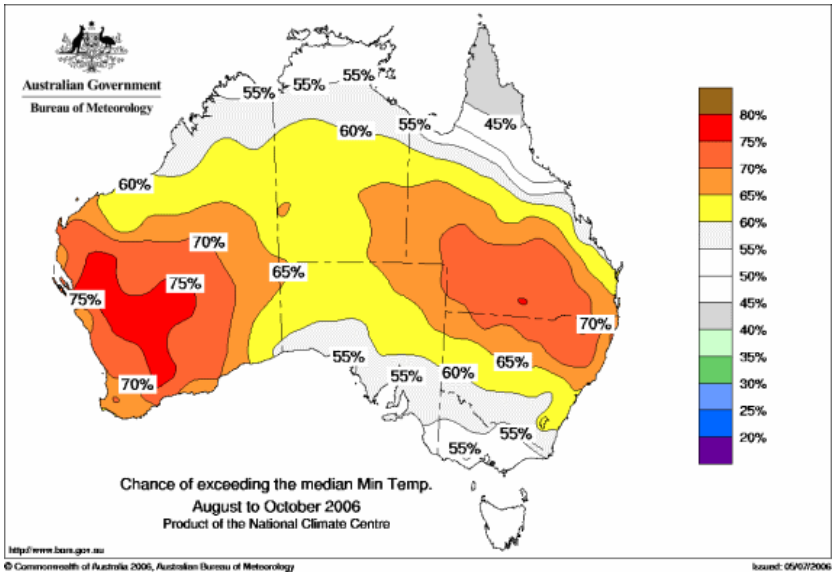
The Bureau of Meteorology have stated that Sea Surface Temperature (SST) anomalies have recently increased in the far-eastern Pacific, while only slight changes have occurred over remaining parts of the Pacific. In general, SST pattern remains neutral. Cloudiness is currently close to average; and the Trade Winds have generally been slightly enhanced in the central to eastern equatorial Pacific during late June to mid-July, and slightly weaker in the far western equatorial Pacific. The Southern Oscillation Index (SOI) had a value of minus 10 at the end of July.

Despite the negative SOI other ENSO (El Niño Southern Oscillation) 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 Niño event to develop this year is low.

4.3 Temperature Outlook



For the August to October 2006 period there is a strong chance for maximum temperatures to be above average across most of Australia. There is a greater than 60% chance of maximum temperatures exceeding the median in most areas, except for Tasmania and parts of the far north, where the tendency is towards average maximum temperatures. South-eastern Queensland has an 80% chance of exceeding median maximum temperatures.



For the August to October 2006 period there is a strong chance of minimum temperatures being above average across most of Australia. There is a greater than 60% chance of minimum temperatures exceeding the median in northern New South Wales, southern Queensland, Southern Northern Territory, Northern South Australia and most of Western Australia. In the southeast of the continent and the far north, there is no strong indication that temperatures will be above or below average.

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