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Summary

Driving Prices Up

- Pasture feed availability in the southern states continues to rebound, however there is strong
 feeling that a run of warm days will shut off the growth as there still remains a moisture deficit
 and pastures have little to pull from. As such supply remains constrained and in high demand,
 requiring the on-going shipping of fodder into the region.
- The start of hay production in QLD and NSW would normally see a drop in prices as new supply becomes available and demand eases, however many producers are only supplying to contracted end users or planning for the export market which is keeping supplies tight.
- The normally high hay production areas of Victoria and South Australia are looking to have a less than average production yield this season. This combined with the need to refill depleted hay stores and meet the expectations of the export market is leading to an uptick in prices in preparation for a perceived shortfall in supply.

Driving Prices Down

- Conditions in Western Australia are continuing to improve and the next hay production season is looking more promising as well as a good supply of pasture feed availability. These have combined to see a slow but steady reduction in some lines.
- As the new season starts to move through the country there is an increase in available supply in the marketplace. While this would normally lead to a quick reduction in prices, given the need to refill depleted stores in some parts if the country this is steadying rather than reducing prices in most cases.
- With the start of the next hay production season any remaining older stores are being cleared out at a discount to make room for the new season hay. This is especially evident in Northern and Central NSW and QLD. While this is dropping the price point the quality is also lower.

Local News

- The underlying dry conditions in the southern states (Victoria, South Australia and Tasmania) remain, even with recent rainfall. Tasmania is seeing the best renewal of subsoil moisture but it is still insufficient to make up the shortfall and SA and VIC is very dependant in timely spring rains to keep pastures moving.
- Some of the croppers in parts of central Queensland which saw frost damage are flipping their crops to hay production.
- The BOM indicates that ENSO and IOD are likely to remain neutral in spring 2024. Sea surface temperatures are neutral having gradually cooled from El Niño levels since December 2023. This cooling is being sustained by deep waters surfacing in the central and eastern Pacific. However, the extent and magnitude of cool water has decreased recently. Atmospheric patterns, including cloud and trade winds, are currently ENSO-neutral. The ENSO Outlook remains at La Niña Watch. La Niña Watch does not guarantee La Niña development, only that there is about an equal chance of ENSO remaining neutral or La Niña developing during the remainder of 2024.
- Buyers are encouraged to feed test and view fodder before purchase to be sure of the quality of feed.

Regional commentary

Atherton Tablelands

- Little to no rain fell across the region this week, though the rain when it did arrive was spread throughout the week, with few consecutive days of no rain. A number of overcasts days and temperatures are on trend for the season.
- Pastures in the region are continuing to bounce back from the earlier frost damage and regrowth
 is picking up with the warmth and good soil moisture availability, though the progress is
 somewhat slow. Additional fodder is being utilised for animal health.
- Hay production work was sporadic this week, with overcast days and rain falling on and off keeping growers from having good conditions for curing cut crops. Though some parts of the region did see a continuation of last week's activity with a fair amount of good quality hay coming off and moving into sheds. These cuts are of mixed quality depending in the delays incurred due to the earlier wet conditions.
- Maintenance work is being undertaken on recently sown crops, with spraying and spreading taking place.
- Silage is continuing to be cut in the west of the region where reasonable conditions and a lack of frost events has led to excess pasture feed and the ability to make some additional grass silage.
 This is continuing to move quickly to dairy farms.
- Input costs are still a concern however petrol has dropped to at \$1.90 per litre. Urea prices are high but seeing some drop to around \$800p/t with blended at over \$1100p/t. Growers are weighing up the return on usage, and the current need from cane farmers is keeping the input prices high.
- Enquiries have seen a bit more of a lift this week as hay is seen to be made and livestock and dairy farmers look to pick up some additional supply. Silage is also seeing a fair bit of movement as it is made. There are comments suggesting recently empty hay sheds are now showing additional supply. Some supply is continuing to come in from the west.
- Pasture (Rhodes Grass) hay: +/-0 (\$340 to \$450/t). Prices remain steady this week.

Please note: Hay in the Atherton Tablelands is traditionally priced at \$/bale, so it is important to check bale weights for conversion. The price range indicated is for feeds of varying quality with the price range generally indicative of quality of feed. We recommend feed testing and viewing of fodder before purchase to be sure of the quality of feed.

Darling Downs

- Little to no rain across the region this week with only isolated areas seeing small falls of less than 5mm of rain, most days were clear and dry and temperatures for the week were well above seasonal averages.
- Pastures in the region continue to show slow but steady growth with the end of winter and the
 expected rise in temperatures seeing a pickup in that growth. Herds are being fairly well serviced
 by available pastures with supplemental feeding for animal health.

- Some of the hay that was cut last week did see some rain, though most was baled before the
 wet weather arrived, the remaining cuts have been left to cure in paddock with the string of drier
 days seeing them cure well, and comments suggest the damage was only to the tops of the
 rows.
- Lucerne stands continue to produce some good quality hay, and some additional cereal hay production took place on the western downs this week.
- Enquiries in the region are steady as some new season hay begins to slowly filter into the
 marketplace; however most growers are seeking to fill sheds before they start to move the
 fodder on, or are supplying to farmers and end users who have contracts in place. As such the
 new hay is not, as yet, having much impact on pricing.
- Some change to pricing this week.
- Cereal hay: -5 (\$300 to \$360/t). Prices decrease this week.
- Lucerne hay: +/-0 (\$ (\$350 to \$450/t). Prices remain steady this week.
- Straw: +/-0 (\$100 to \$140/t). Prices remain steady this week.
- Pasture hay: +/-0 (\$250 to \$345/t) Prices remain steady this week.

North Coast NSW

- Little to no rain across the region this week, with falls of less than 5mm of rain being recorded in isolated patches, but most areas saw no rain. Clear, dry days for most of the week with limited cloud cover. Temperatures were very much above average for this time of year.
- Pastures in the region continue to be green and are providing fairly good feed options to local herds, though the high soil moisture is continuing to produce some watery regrowth and leading to some pastures needing additional time before being used in rotation. Roughage continues to be fed out.
- Some hay is being cut in the region, with the string of clear and dry days providing excellent cutting and baling conditions for the early crops. Most of the local producers have kicked off this week and will look to get through the available crops over the next month as the harvest moves into full production for those who managed to get a decent crop into the ground earlier in the year.
- Chickpeas close to the QLD border are showing some good growth, especially in areas with a bit
 of elevation as the consistent rainfall over the last few months has caused some issues with wet
 roots. Anything with a fair amount of drainage and good warmth is showing excellent growth and
 potential.
- Enquiries in the region have pulled back a little as the mowers move into paddocks, and some
 new season hay is beginning to be baled. However the reduction in available fodder crops due
 to earlier conditions is tempering some of the enthusiasm, and farmers are continuing to rebuild
 supplies. The southern states continue to drive demand.
- Some change to prices this week

- Cereal hay: -5 (\$320 to \$360/t). Prices decrease this week.
- Lucerne hay: +/-0 (\$370 to \$430/t). Prices remain steady this week.
- Straw: +/-0 (\$100 to \$140/t). Prices remain steady this week.
- Pasture hay: +/-0 (\$250 to \$300/t). Prices remain steady this week.

Central West NSW

- A mixed position this week with the northern parts of the Central West seeing low rainfall of around 10mm for the week, while the central and southern parts recorded an average of 25mm of rain, and some storms were recorded in the south into the Riverina. Temperatures continue to trend upwards.
- Pastures in the region continue to provide green feed opportunities and the reasonable rains and increasing soil temperatures is seeing additional growth in slowed pastures. This is in line with seasonal expectations. Fodder for roughage continues to be supplied.
- Wheat and canola crops in the eastern part of the region are showing excellent growth, and have taken advantage of some timely rain and warmth, though growers are hoping for a kind spring to keep the crops moving well.
- Hay and fodder production which was planned to kick off well this week has been delayed by the continuing rainfall. Many hay production crops are ready for cutting and producers are looking for a break in the weather to enable them to start to pull the fodder off. Weather will play a large part in the timing of the start of the season, though indications are that there will be a good hay season in the region.
- Cotton crops in the north of the region are looking good and are being irrigated as they head into the peak bloom period.
- Enquiries in the region have dropped slightly as the warmer conditions begin to be seen and the new season of fodder production is starting. Hay sheds are still fairly empty and new season hay is starting to fill them for both producers and farmers. Demand continues to be driven out of the unseasonal drier parts of Victoria and the usual requirements out of the Bega Valley.
- Some change to prices this week
- Cereal hay: -5 (\$340 to \$385/t). Prices decrease this week.
- Lucerne hay: +/-0 (\$380 to \$430/t). Prices remain steady this week.
- Straw: +/-0 (\$135 to \$155/t). Prices remain steady this week
- Pasture hay: -10 (\$240 to \$290/t). Prices decrease this week.

Please note: Unless stated otherwise, prices are per tonne, sourced and delivered locally. The price range indicated is for feeds of varying quality with the price range generally indicative of quality of feed. We recommend feed testing and viewing of fodder before purchase to be sure of the quality of feed.

Bega Valley

- Little rainfall recorded in the Valley this week, with some areas seeing between 1 and 5mm of rain, though the border with Victoria did see up to 15mm for the week. Temperatures are continuing to trend upwards.
- Pastures in the region continue to be green with the small rainfall keeping some growth moving, but the area does need additional rains and continuing moderate temperatures. Irrigation is being employed to bolster growth in many parts of the Valley, and the north which needed a dry period is now looking for some additional rains.
- Hay production crops in the region could do with some more rain to get them over the line, though irrigated crops are looking fairly good. In parts of the north just outside the Valley the drier conditions and warmer temperatures have seen excess pasture feed which is being made into silage for local dairy usage.
- Winter wheat crops in the region are still being used for grazing of local herds, as with many crops this year the season is running later than usual and these crops will be locked up in the next few weeks rather than at the beginning of September as expected.
- Enquiries are still ticking over as expected in the Valley and this will not change until the season does. Pasture availability as well as on-farm stores are continuing to keep some demand in check but the drying out of some areas is causing concern about pasture feed availability.
 Fodder is coming in from southern NSW and Victoria.
- No change to pricing this week.
- Cereal hay: +/-0 (\$390 to \$460/t). Prices remain steady this week.
- Lucerne hay: +/-0 (\$480 to \$540/t). Prices remain steady this week.
- Straw: +/-0 (\$180 to \$250/t). Prices remain steady this week.
- Pasture hay: +/-0 (\$330 to \$390/t). Prices remain steady this week.

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Goulburn/Murray Valley

- Light falls across the region this week with widespread rain of around 15mm recorded, though some areas saw slightly less. Shepparton recorded 12mm for the week. There were a few dry days but most days recorded some rain. Temperatures continue to be above average in the region, for both day and night time maximums.
- Pastures in the region are still green but much of that is due to irrigation as dryland pastures are seeing much less growth, with warmer than usual temperatures seeing the top soil drying out quickly even after some rains. Fodder continues to be fed out for animal health.
- Early cuts of hay were expected to start in the west of the region this week; however the sporadic rainfall has caused a delay, given the inability to dry the cuts. Further west into the Mallee some hay cutting and baling has been taking place due to the continued dry conditions.

- Some cereal and canola crops in the central part of the region were hit with hail in the recent storms and have seen significant damage to the crops. There is an option to turn some of these damaged crops into hay, but much of it will be written off as too badly damaged to salvage.
- Vetch crops continue to be high demand from both local and intrastate buyers, there is some concern that the lack of rains may see a drop in potential from these crops, and producers are looking to lock in contracts to mitigate the cost of irrigation.
- Local enquiries have dropped a little, as the weather begins to turn and there is hay being made
 in the Mallee. Vetch continues to be sought and locked in where possible, with lucerne also
 seeing a bit of a lift. As has been the case for some time demand continues to be driven out of
 the drier parts of the state and into South Australia.
- Some change to pricing this week
- Cereal hay: -5 (\$330 to \$380/t). Prices decrease this week.
- Lucerne hay: +5 (\$400 to \$450/t). Prices increase this week.
- Straw: +/-0 (\$120 to \$160/t). Prices remain steady this week.
- Pasture hay: +/-0 (\$280 to \$320/t). Prices remain steady this week.

Gippsland

- A mixed rainfall record this week with the west and east both receiving good rainfall of around 15-20mm, while the central parts saw only around 5mm of rain. There were a number of dry though somewhat overcast days this week. Daytime temperatures continue to trend above seasonal norms.
- Grass is growing well in the region, with warmer than usual days and good soil moisture to draw from seeing excellent growth, to that point that some pastures are running ahead of the herds and are now being set for silage production.
- Silage production has ramped up in the region with the good growing conditions in the area and
 the early spring seeing exceptional and unseasonal growth. Many mixed enterprises as well as
 dedicated fodder producers are out cutting and chopping silage for baling and pitting. Comments
 suggest that this season looks to produce a very good reserve of silage if the early indications
 continue through spring.
- While the conditions for grass growth have been excellent and comments indicate there has been a burst in growth over the last 2-3 weeks, the pastures are pulling from the currently available subsoil moisture and there will need to be rains to keep the growth moving along.
- Recently sown ryegrass pastures have germinated and emerged well; these pastures will need follow up rains and warmth to establish.
- Enquiries in the region are stable, and of moderate level as very good pasture availability and the start of fodder production is tempering need. Some hay supplies are still somewhat constrained, but on-farm stores are good. Most demand continues to come from the south west, into South Australia and some up to the Bega Valley.

- Some change to pricing this week.
- Cereal hay: +5 (\$380 to \$420/t). Prices increase this week.
- Lucerne hay: +/-0 (\$460 to \$490/t). Prices remain steady this week.
- Straw: +5 (\$170 to \$200/t). Prices increase this week.
- Pasture hay: +5 (\$270 to \$300/t). Prices increase this week.

Southwest Victoria

- Some light to moderate falls in the region this week with widespread rain of around 10-15mm, though the area around the Otways again saw higher falls of 25mm of rain. Temperatures were above average again this week and are trending above average for the season.
- Pastures in the region are showing green, but the regrowth is still low in nutritional value for some and is a typical green drought scenario. Fodder continues to be fed out to supplement the pastures as they rebound to viable feed for those without good soil moisture to draw from.
- While the last few weeks have seen a good turnaround in the availability of pastures in parts of the region, and the exception growth of grasses, there is an underlying concern that this rebounding can be halted by an early spring and higher temperatures which will see the lack of good subsoil moisture shut down growth.
- The north of the region has seen some excellent growth in cereal and oilseed crops with the rains and warmth seeing an improvement in the prospects after a rocky start.
- Sporadic silage production has taken place in the region in areas that have the right mix of warmth and moisture, though this is has been somewhat hit and miss this week with some rain interrupting the cutting.
- Enquiries in the region have dropped a little as more pastures become available and some very limited fodder production is beginning locally as well as up in the Mallee which will be available for south western farmers. Sheds are still empty in the region and stores need to be rebuilt so hay trucks continue to move. Vetch and cereal hay as well as straw is being sought and supplies continue to come into the region as local supply is insufficient.
- Some change to prices this week.
- Cereal hay: +5 (\$360 to \$410/t). Prices increase this week.
- Lucerne hay: +/-0 (\$370 to \$425/t). Prices remain steady this week.
- Straw: +5 (\$110 to \$155/t). Prices increase this week.
- Pasture hay: +/-0 (\$255 to \$310/t). Prices remain steady this week.

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Southeast South Australia

- Fairly light falls across the region this week with the southern tip receiving the highest falls of around 15mm of rain while more inland saw much reduced totals of between 5mm and 10mm of rain. Temperatures were above average this week and high winds reported.
- Pastures in the region are continuing to show green with the light but fairly steady rainfall, however subsoil moisture is still low and there are no full profiles available to draw from, so the continued growth in pastures and the availability of feed is dependent on continued spring rains.
- Hay producers along the western coast still need to irrigate any potential hay production crops as the limited rainfall over winter has failed to provide enough moisture for good growth, so the crops are still some weeks behind expected schedule. Anything dryland is showing a sizeable lack of growth.
- Fodder and cereal crops in the region have benefited from the recent rains which has bolstered some soil moisture, however this was simply replacing the deficit and not building up any excess and with the higher than usual temperatures and very windy days, drying of the topsoil is very evident with the crops back to exhibiting moisture stress.
- Lucerne crops in the region continue to look very good with the warmer weather bolstering the growth of the irrigated stands. Comments indicate that there should be a good amount of lucerne hay produced this year, which is hoped to balance the growing feeling of a much reduced hay production yield this season.
- Enquiries remain steady in the region, with the available pastures keeping some demand in check; however there are a lot of empty hay sheds and reduced conserved fodder on farm, so farmers are looking to rebuild supply. In addition producers need to fill sheds for contracted end users and the export market so supply continues to be constrained. Vetch and cereal hay remains in consistent demand.
- Some change to prices this week.
- Cereal hay: +10 (\$370 to \$410/t). Prices increase this week.
- Lucerne hay: +5 (\$400 to \$445/t). Prices increase this week.
- Straw: +/-0 (\$130 to \$160/t). Prices remain steady this week.
- Pasture hay: +5 (\$285 to \$320/t). Prices increase this week.

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Central South Australia

- Little to no rainfall across parts of the region this week, with falls on average of between 5 and 10mm of rain, though some in the central parts saw no rain for the week. Temperatures are above average for the season, and high winds have been reported this week.

- Pastures in the region are still green but regrowth is patchy and inconsistent in its nutritional value, additional rains will be needed to build up soil moisture and allow for good quality feed to be available. Fodder continues to be needed and fed out to local flocks.
- Irrigated lucerne crops sown in late May around Brinkley are looking good and enjoying the boost of growth brought on by the warmer weather. These crops will be cut in around three weeks if conditions are good.
- Recent low rain is seeing a lot of the fodder and cereal crops continuing to move along, but much slower than usual and the lack of good subsoil moisture to draw from as well as dry conditions is continuing to keep the expected yield low.
- Some croppers in the region are feeling less than optimistic about the grain season, for the late germinating crops, of which there are many, spring has turned up too early and with some areas seeing unseasonal high temperatures and winds this is causing accelerated drying. A number of these growers are looking at flipping crops to hay production early rather than wait out until later in spring.
- Enquiries remain robust in the region, some pasture availability and the knowledge that the next season is beginning in the Victorian Mallee is dropping urgency but there is still ongoing need. A wide range of hay quality is entering the market as sellers continue to clear out the last of their sheds. Fodder and grains continue to go out to supplement herds. Vetch and lucerne are being sought, with comments suggesting vetch remains in high demand
- Some change to prices this week.
- Cereal hay: +5 (\$340 to \$385/t). Prices increase this week.
- Lucerne hay: +5 (\$390 to \$450/t). Prices increase this week.
- Straw: +/-0 (\$120 to \$155/t). Prices remain steady this week.

Southwest Western Australia

- Another wet week in the region with the south west tip seeing the highest falls, reducing as the bands moved inland. Bunbury and Manjimup saw 40mm of rain while Katanning saw 15mm of rain.
- Grass is continuing to grow in the region and the pastures have made almost a complete recovery from the conditions they were in a few months ago due to timely and consistent rain as well as unseasonal warmth. Herds and flocks are being well serviced by available pasture feed, though fodder is being fed out for nutritional requirements.
- While rain is welcomed in the area, some parts of the south west are now beginning to see standing water on pastures and paddocks due to a number of very high rainfall days over the past fortnight. This is causing some issues with trafficability.
- Some early silage cutting is taking place around Ravensthorpe, this is opportunistic cutting in an
 area that saw some rain even during the driest periods and has seen the pastures running
 ahead of the herds as a result of the turnaround of the season. Most silage will not be cut for a
 few more weeks.

- Oilseed and cereal crops continue to show excellent growth in the region and like pastures have responded well to good moisture and warmth to put on height and biomass. Some issues with blackleg in canola have been reported due to overcast conditions but these are being mitigated.
- Enquiries in the region are steady; with the good pasture feed availability and rebuilding stores beginning to see a pull back on demand, though farmers continue to buy in stores to replenish the amount used during the unseasonal dry conditions earlier in the year. Good quality parcels as well as some roughage is still being sought and is moving fairly well.
- Some change to prices this week.
- Cereal hay: +/-0 (\$360 to \$400/t). Prices remain steady this week.
- Lucerne hay: +/-0 (\$380 to \$440/t). Prices remain steady this week.
- Straw: -5 (\$100 to \$145/t). Prices decrease this week.
- Pasture hay: -5 (\$260 to \$300/t). Prices decrease this week.

Northwest Tasmania

- Heavy rainfall across the region this week and all of Tasmania saw reasonable falls, especially in the drier than usual south of the state. The Northwest and western coastal areas saw very high rainfall totals of around 50mm to 100mm of rain, with Smithton receiving 65mm of rain and Marrawah 75mm of rain. Some areas lost power due to the storms.
- Pastures in the northwest saw a lot of rainfall this week, with many reporting standing water and waterlogged paddocks. While this will help to refill the moisture profile it is causing issues with safe grazing and trafficability into paddocks.
- Ryegrass pastures sown in June have established well and are set to provide good grazing for local herds over spring before being locked up for hay production late in the season.
- On the back of low feed stocks some livestock producers are choosing to sow spring cereals to boost hay and silage production.
- Silage cutting was again delayed this week due to the very wet weather, however comments indicate there will be a fair amount of the fodder cut and ensiled if the rain holds off and temperatures rise.
- Enquiries in the state are fairly robust, and while the North West does have available green feed the recent very wet weather is reducing some availability, though it may have a positive effect in other parts of the state to encourage pasture growth. The demand continues to outstrip supply so fodder is continuing to be shipped from the mainland to meet the needs of local dairy and livestock producers.
- No change to pricing this week.
- Cereal hay: +/-0 (\$330 to \$360/t) Prices remain steady this week.
- Lucerne hay: +/-0 (\$350 to \$410/t) Prices remain steady this week.
- Straw: +/-0 (\$110 to \$140/t) Prices remain steady this week.

- Pasture hay: +/-0 (\$285 to \$365/t) Prices remain steady this week.

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Acknowledgement

Dairy Australia acknowledges the funding from levy payers and contribution by Commonwealth Government.

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