

Seasonal Conditions Insights Snapshot

DECEMBER 2025

KEY POINTS

In December 2025, rainfall was below to very much below average across northern and eastern regions, while some central and southern inland areas recorded above-average totals. Tasmania recorded an average rainfall total of 86.1 mm, which is 17 per cent below the 1961–1990 long term average.

Over the 12 months to December 2025, most of the state experienced below-average rainfall, with some areas in the east and southeast classified as very much below average and parts of the southwest recording their lowest 12-month rainfall on record.

Mean maximum temperatures were below average across much of the western half of the state, and mean minimum temperatures were below average for most areas, resulting in Tasmania's lowest December mean temperature since 2008. This has delayed plant growth and maturation, meaning harvest for many crops (cherries, cereals and pyrethrum) is anticipated to be later than normal. Impacts of this will be known after harvest.

Throughout December, soil moisture and runoff declined in the north and northeast, indicating a normal drying trend for the summer months, while western and highland regions remained near average due to earlier wet conditions through spring.

The Bureau of Meteorology's outlook for January to March 2026 indicates a high likelihood of above-average maximum and minimum temperatures across Tasmania, with rainfall likely to be below average in southern areas and no strong signal elsewhere. This pattern is typical of summer, when rainfall decreases before the autumn break¹ brings moisture that supports growth ahead of soil temperatures cooling in winter.

Irrigation season is in full swing, with seed crops locked up from grazing and fodder crops established to increase feed availability through the drier summer months. Hay

¹ An autumn break (March to May) is defined as the first significant rainfall event(s) in autumn that have 25mm or more of rainfall over a period of less than three days or 30mm or more of rainfall over a period of less than seven days.

and silage cutting is progressing, with reports indicating good quality. Grain harvesting began late in the month, starting with canola.

China has imposed a 55% tariff on Australian beef imports exceeding the threshold quota to protect its domestic producers. Australian stakeholders anticipate the tariff will impact prices and competition in existing markets. Tasmanian producers have a limited but substantive exposure with 7% of the state’s beef going to China. Market prices domestically and internationally remain robust for red meat, with an overall positive trend as demand continues to remain high. Producer confidence was reported to be positive by the Rabobank Rural Confidence Survey due to strong prices and positive seasonal conditions.

Under the Monitoring Seasonal Conditions and Drought Framework, when all indicators (primary and climatic) are combined, it indicates a similar position to November where most of the State is experiencing average seasonal conditions. A continued watch remains in the South-east and Tasman Peninsula due to prolonged below average rainfall over the past 12 months.



Drought Phases	Districts
Average Seasonal Conditions	North East, East Coast, Flinders Island, King Island, Circular Head, West Coast, Derwent Valley, Central Highlands,
Preparedness	South East, Tasman Peninsula
Emerging Drought Conditions	Nil
In Drought	Nil

Primary (Lead) Condition Indicator

Climate Overview

December 2025 in Tasmania was marked by below-average rainfall overall, with totals 17 per cent below the long-term average. There were differences regionally with dry conditions in northern and eastern regions, while some central and southern inland areas recorded above-average falls. Longer-term trends show rainfall deficits across most of Tasmania for the past 12 months. Soil moisture and runoff declined notably in the north and north-east during December, signalling a developing normal drying trend, while western areas and Central Highlands areas saw little change due to continued rainfall. Temperatures were cooler than usual, with the state experiencing its lowest December mean temperature since 2008. Looking ahead, January to March 2026 is forecast to bring above-average temperatures and a high likelihood of unusually warm conditions, with rainfall expected to remain below average in southern Tasmania and no strong signal for the remainder of the State. Overall, the majority of Tasmania shifted towards typical summer conditions.

Precipitation

Rainfall totals in December were below to very much below average for parts of northern and north-western Tasmania including Furneaux Islands, and above average for some central and southern inland areas.

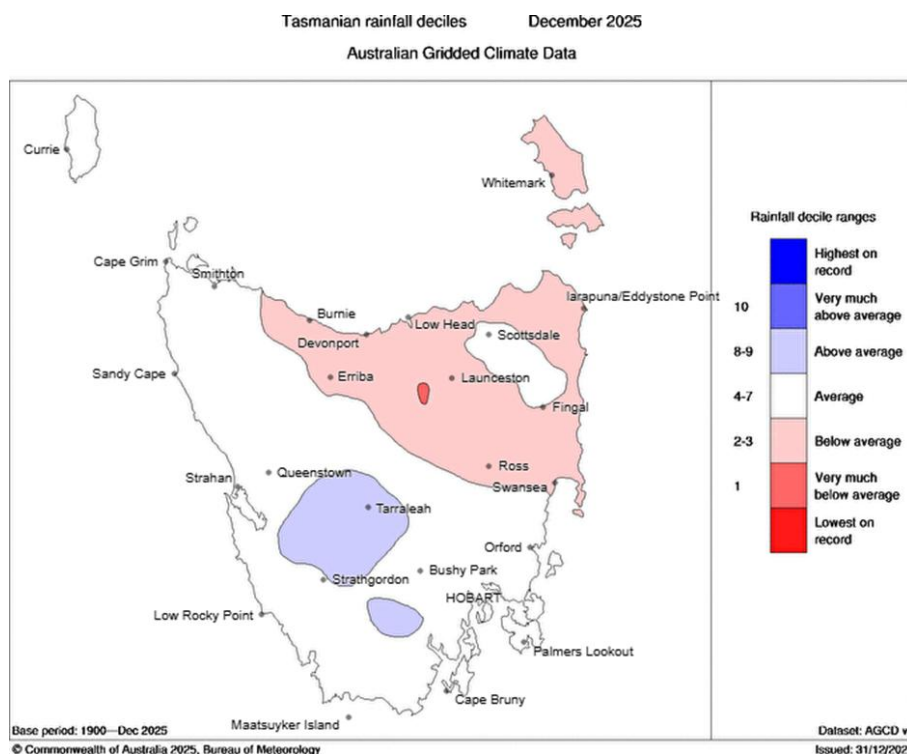


FIGURE 1: TASMANIAN RAINFALL DECILES FOR DECEMBER 2025 FROM BUREAU OF METEOROLOGY

Temperature

Mean maximum temperatures in December were below average for much of the western half of the state and were close to average elsewhere.

Mean minimum temperatures in December were below average for most of the state, and close to average in the north-west and in small areas along the south-east coast. Tasmania had its lowest mean temperature for December since 2008.

12 monthly rainfall deciles for Tasmania

For the 12 months, from January 2025 to December 2025, most of Tasmania experienced below average rainfall, with the Tasman Peninsula and far north-east recording very much below average. Most of the state was classified as below average, with only a tiny patch in the south-central region showing above-average rainfall.

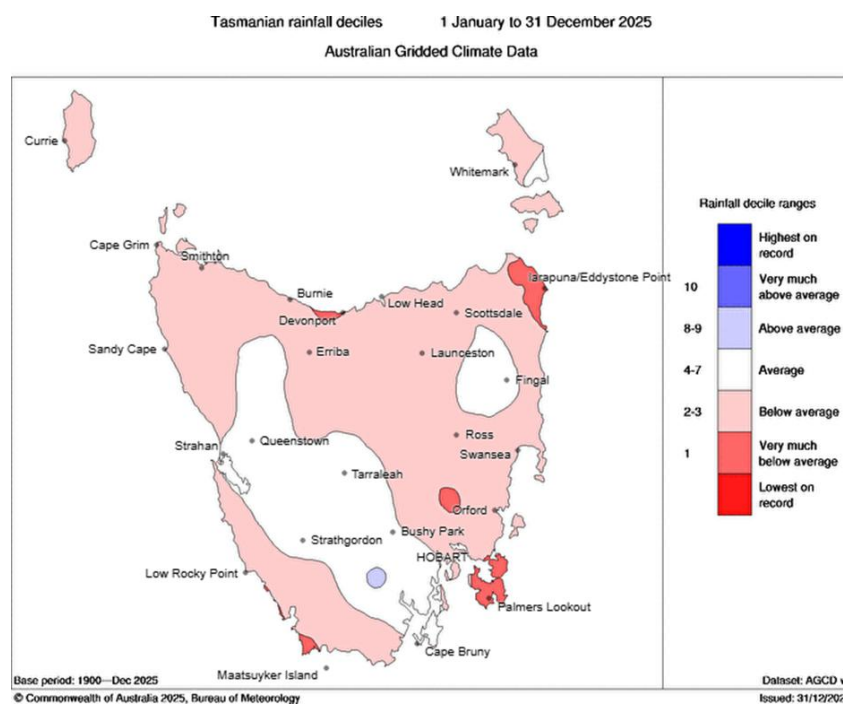


FIGURE 2: RAINFALL DECILES FOR THE 12 MONTHS TO END DECEMBER 2025 FROM BUREAU OF METEOROLOGY

Long Range Rainfall and Temperature Forecast

According to the BoM long-range forecast issued on January 8, 2026, from January to March 2026, Tasmania is expected to have above-average temperatures, with maximum temperatures likely to be higher than normal (60 to 80 per cent chance) and an increased likelihood of unusually high maximum temperatures (over 50 per cent chance) across much of the state. Minimum temperatures are very likely to be above average (more than 80 per cent chance). Rainfall is expected to be below average in southern Tasmania, with a 60 to 80 per cent chance of drier conditions, while other areas show no strong signal. This means potentially higher evapotranspiration rates and potentially increased demand for irrigation water.

Root Zone Soil Moisture:

Soil moisture decreased from the above-average levels observed in November to near average in December, reflecting reduced rainfall. As a result, December marked a shift from wet profiles to more moderate or locally dry conditions, particularly across northern and eastern districts. Despite this, the west and Central Highlands retained

above to very much above average soil moisture due to earlier wet conditions seen in spring.

Runoff:

The improvement in hydrological conditions seen in November weakened during December, with a shift to drier conditions across much of Tasmania. Runoff was below to very much below average in the north, north-east, Northern Midlands and Southern Midlands, representing a decline from the broadly average conditions recorded in November. These changes indicate a developing drying trend, consistent with reduced rainfall and declining catchment moisture in northern regions. In contrast, the west and south-west maintained near-average runoff, following several months of above-average streamflow earlier in spring 2025.

Deep Layer Soil Moisture:

Tasmania's deep soil moisture continues to remain very much below average across most regions. This is not likely to shift until winter, when evapotranspiration lowers, and high-total rainfall events occur. Low deep soil moisture impacts the potential of plant growth for current and future seasons.

Standardised Precipitation Evapotranspiration (SPEI):

The Standardised Precipitation Evapotranspiration Index (SPEI, 12-month scale) remains broadly within the normal range, continuing the stability established in recent months. There are now signs of renewed drying in some areas, such as the far north-east and pockets of the south-east, where conditions have shifted toward the moderately dry category.

Five Monthly Indicator:

The five-month rainfall trend continued to rise through November; however, with the drier conditions in December, most sites now show a downward shift. Despite this decline, most sites remain within the 'normal' range.

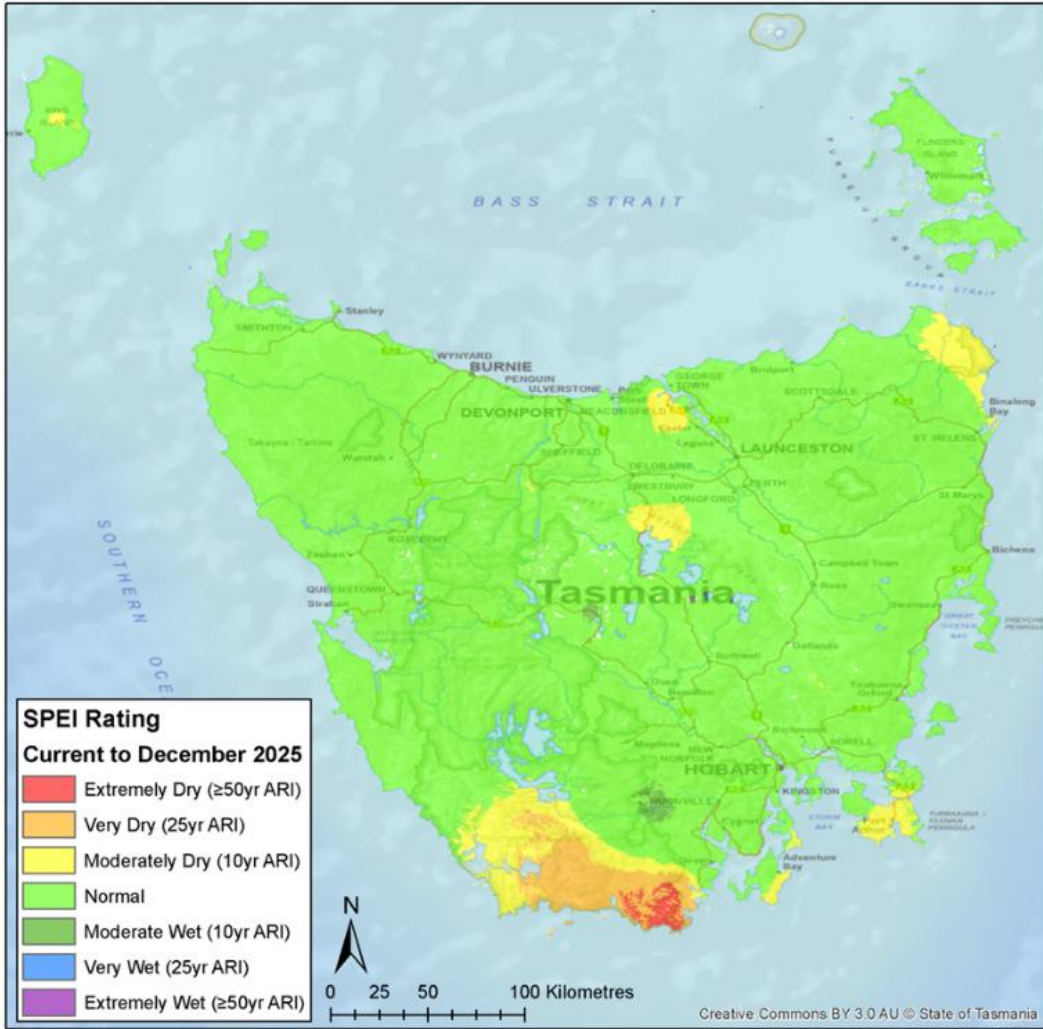


FIGURE 3: REGIONAL 12-MONTH STANDARDISED PRECIPITATION-EVAPOTRANSPIRATION INDEX (SPEI) TO END DECEMBER 2025

Secondary Indicators

Hydrological Monitoring

Key Message: *Below average rainfall for December resulted in an increase in water access restrictions, due to reduced river levels. Irrigation schemes are in full swing, with a now resolved outage in one TI scheme that reduced water availability for 16 days.*

NRE Tas Water Operations

During the reporting period, the Water Compliance Team conducted 50 assessments, resulting in:

- 35 restrictions
- 0 flood take notices.
- 0 opportunistic take notices
- 7 easements
- 5 low flow warnings due to reduced river flows.

Assessment and notice figures vary from December 2024. While there was a significant increase in the number of restrictions issued, there were no flood and opportunistic takes issued for December 2025. December 2024 brought an unseasonal rain event that helped increase the State's river flows and allowed multiple flood and opportunistic takes to be issued. While during December 2025 below average rainfall was received for many parts of the State, which reduced river flow levels, resulting in more restrictions being issued and an absence of flood and opportunistic takes.

For further information please refer to the NRE Tasmania Water Information Web Portal (<https://portal.wrt.tas.gov.au/Data>).

Tasmanian Irrigation

All TI irrigation schemes are now open and operating for the season. All entitlement holders across all schemes received a 100% allocation to their annual entitlement.

During late November and early December, a 16-day outage occurred on the Midlands Irrigation Scheme mini-hydro generator. During the outage, irrigators voluntarily reduced water usage to help manage supply (including drawing from on-farm stored water). The repair was completed before peak irrigation demand, ensuring continuity of water delivery.

For further information please refer to the Tasmanian Irrigation website (<https://tasmanianirrigation.com.au/>).

Streamflow

Streamflow observations for December 2025 were within normal ranges across most Tasmanian catchments. Forecasts for December to February 2026 indicate near-average to high flows in eastern catchments, while south-east and some north-east areas are likely to experience below-average flows. Streamflow affects the capacity to take water from watercourses for irrigation purposes.

For further information refer to BoM's Seasonal Streamflow Forecasts (<https://www.bom.gov.au/water/ssf/>).

Economic Indicators

Key Message: *Beef exports may face headwinds due to market conditions relating to tariffs but economic environment and producer confidence has largely remained positive for the broader agriculture industry.*

At the end of December, China announced a 55 per cent tariff will apply to red meat imports that exceed the tariff quota of 205,000 tonnes from the 1st of January 2026. China is a significant trading partner and imported about 7% (2,800 tonnes) of Tasmania's beef in 2023-24. Industry has reflected that the tariff may lower beef prices internationally and domestically due to increased competition in existing markets. The actual impact will become evident in future months.

Despite the changing trade environment for beef, overall, the economic situation is steady for Tasmanian producers with oil prices continuing to moderate and lower shipping costs compared to December 2024.

Rabobank's Rural Confidence Survey Quarter 4 2025 report released 17 December 2025 reported that Tasmanian farmers were the most confident in the nation. Positive sentiment was driven by commodity prices and improved seasonal conditions. Producer confidence drives on-farm investment and shows the underlying strength of the industry.

Agronomic Indicators

Key Message: *plant growth rates improved gradually through December, after a slow start due to cool soils, with irrigation supporting critical crop stages for soon to be harvested crops.*

Pasture growth rates slowly increased as December went on, with cooler than average soil temperatures hindering growth in the first two weeks of the month.

Irrigation season is in full swing, with seed crops, fodder crops and poppies in critical growth stages.

Hay and silage making continues and will be ongoing until well into the new year, with a delayed start due to cold and wet conditions experienced until mid-December. Quality is reported to be good, despite the colder conditions.

The Dairy Australia Hay Report (19 December 2025) states that prices have shifted: cereal hay is up \$50 (\$250–\$350/t), lucerne is down \$20 (\$280–\$360/t), while straw (\$100–\$140/t) and pasture hay (\$200–\$260/t) remain steady.

Regulated Crops reports that industrial hemp sowing is continuing. Poppy crops have had an unusual session with the colder spring temperatures and wind delayed crop growth. For some crops this may mean later harvest. Some poppy crops are still being irrigated early in January unlike other years where this stops around Christmas.

Fertiliser prices in Australia during December 2025 dropped slightly due to weaker global prices and a stronger Australian dollar, with urea priced at \$760-770 per tonne. Overall demand for urea and phosphate-based products was down in 2025 nationally, reflecting challenging seasonal conditions in mainland grain growing areas.

For further information please refer to the Dairy Australia / Tasmanian Institute of Agriculture pasture reports (<https://www.dairyaustralia.com.au/tasmania/pasture-growth-report>) and hay and grain reports (<https://www.dairyaustralia.com.au/industry-reports/hay-and-grain-reports>).

Social Indicators

Key Message: *sentiment remains positive in most areas, with an anticipated reduction in the need for support services as the focus shifts to harvest and on-farm activities.*

As of 6 January 2026, the Department of Agriculture Fisheries and Forestry (DAFF) Farm Management Deposit (FMD) Rainfall Analyser indicates that there are currently no eligible FMD areas in Tasmania. This marks a change from recent months, when the Tasman Peninsula, (and earlier the North-West Coast and Bass Strait Islands) qualified due to significant rainfall deficits. As of 30 November 2025, the total number of FMD accounts for Tasmania is 781, with a value of \$107,616,000. This is a decrease of 1 account valued at \$530,000 since 30 October 2025.

Regional Investment Corporation (RIC) figures are the same as the previous month - Since 1 July 2018 RIC has approved 37 loans valued at over \$44 million in Tasmania as of 31 October 2025.

Financial counselling service providers anticipate a reduction in client interactions during December and January due to peak cropping and harvest periods where clients prioritise on-farm activities over business and financial management. Services remain available at all times, should primary producers require them.

For further information please refer to FMD Rainfall Analyser – Department of Agriculture, Fisheries and Forestry: <https://www.agriculture.gov.au/agriculture-land/farm-food-drought/drought/fmd/fmd-rainfall-analyser>

Freight and Logistics

Key message: *No reported disruptions or delays reported, regular freight operations.*

There are no known areas of concern for freight to King Island or Flinders Island as of 12 January 2026.

Cattle movements for King and Flinders Island continue to remain lower than in previous years, with this likely due to lower stocking numbers after last year's destocking.

For further information please refer to TasPorts shipping schedule (<https://tasports.com.au/shipping-schedule-all>).

Prepared by:

**AgriGrowth Tasmania, Department of Natural Resources and Environment
Tasmania**

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