Seasonal Conditions Insights Snapshot

NOVEMBER 2025

KEY POINTS

Overall, conditions in November 2025 have eased immediate water stress, but the residual deficit of deep soil moisture emphasises the importance of proactive planning.

Under the Monitoring Seasonal Conditions and Drought Framework, when all indicators (soil moisture, agronomic production, runoff, and pasture growth) are combined, it indicates a similar position to October 2025 where most of the State experienced average seasonal conditions. However, there remains a need to monitor the South East and Tasman Peninsula, where rainfall in October 2025 and November 2025 greened the landscape, but pasture availability remained limited.

With the wettest November since 2022, the month delivered cooler and wetter conditions that eased the prolonged dryness experienced over the previous year. Western and southwestern regions recorded rainfall in the highest decile, with some areas reaching record highs, while most other regions remained near average. Statewide rainfall totalled 136.8 mm, about 36% above the November norm, consolidating recovery from earlier deficits. The average maximum mean temperature was 1.86°C below the 1961-1990 average, making it the eighth coolest November since 1910, driven by multiple cold fronts and widespread rain.

Agricultural conditions improved markedly as rootzone soil moisture and streamflow rebounded, reducing dry conditions and supporting pasture growth and crop establishment. Root zone soil moisture[1] ranked in the 75th percentile, indicating significantly wetter-than-normal conditions in western and southern regions, while runoff returned to near-average levels across most of the State. However, deep soil moisture remains very low, posing ongoing challenges for perennial crops and highlighting the need for continued irrigation.

[1] Refer Bureau of Meteorology Australian Water Outlook for definition

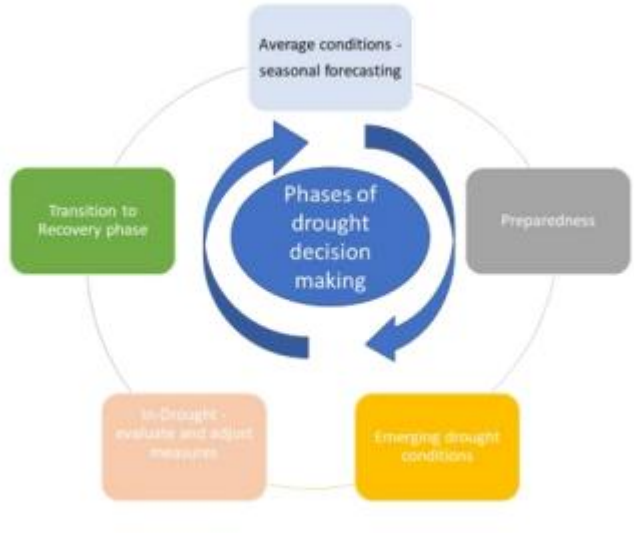
Department of
Natural Resources and Environment Tasmania

Tasmanian Government

The fire season in Tasmania typically begins in spring and continues through summer. Bushfires on the east coast have already caused private residential damage. No major agriculture assets were impacted.

Persistent cold temperatures combined with strong winds have slowed plant development, leading to lower-than-normal pasture growth for the time of year. Warmer, sunnier days will be needed to raise soil temperatures and stimulate the boost in growth needed to maximise hay and silage. Despite the windy conditions, evapotranspiration in November has remained slightly below the long-term average.

Looking ahead, the Bureau of Meteorology's (BoM) summer outlook (Dec 2025–Feb 2026) signals a neutral rainfall forecast but warmer-than-average temperatures. Elevated temperatures could increase evapotranspiration and irrigation demand. Farmers are preparing for summer by adopting efficient water strategies to assist in crop production and suitable livestock management to reduce potential heat stress.



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 - Rainfall

Seasonal Conditions Overview

In November 2025, Tasmania experienced significantly above-average rainfall, particularly in the western and southwestern regions. Large areas around Queenstown, Strahan, and extending toward Smithton and Cape Grim recorded rainfall in the highest decile, with some locations reaching their highest levels on record. The central highlands, including Strathgordon and Tarraleah, also saw very wet conditions. In contrast, eastern Tasmania, including areas such as Fingal, Swansea, and Orford, generally recorded average rainfall, with no notable dry anomalies.

Precipitation

November 2025 was notably cool and wet across Tasmania. The State recorded an area-averaged mean maximum temperature 1.86°C below the long-term average, making it the eighth-lowest November maximum on record and the coolest since 1968. This was driven by several cold fronts early in the month, which brought widespread light to moderate rainfall and temperatures up to 8°C below average. Mean minimum temperatures were also slightly below average, reinforcing the cooler-than-usual conditions. These cold outbreaks were accompanied by snow in alpine areas of Victoria and southern New South Wales, highlighting the strength of the cold air masses affecting southeastern Australia.

Referring to the map below, rainfall was above average across most of Tasmania, with the State's area-averaged total reaching 136.8 mm, about 36% above the November norm. This wetter pattern consolidated the recovery from earlier dry conditions, improving rootzone soil moisture and streamflow across much of the State. The rain was associated with frontal systems and moist onshore flows, contributing to healthy water availability for agriculture.

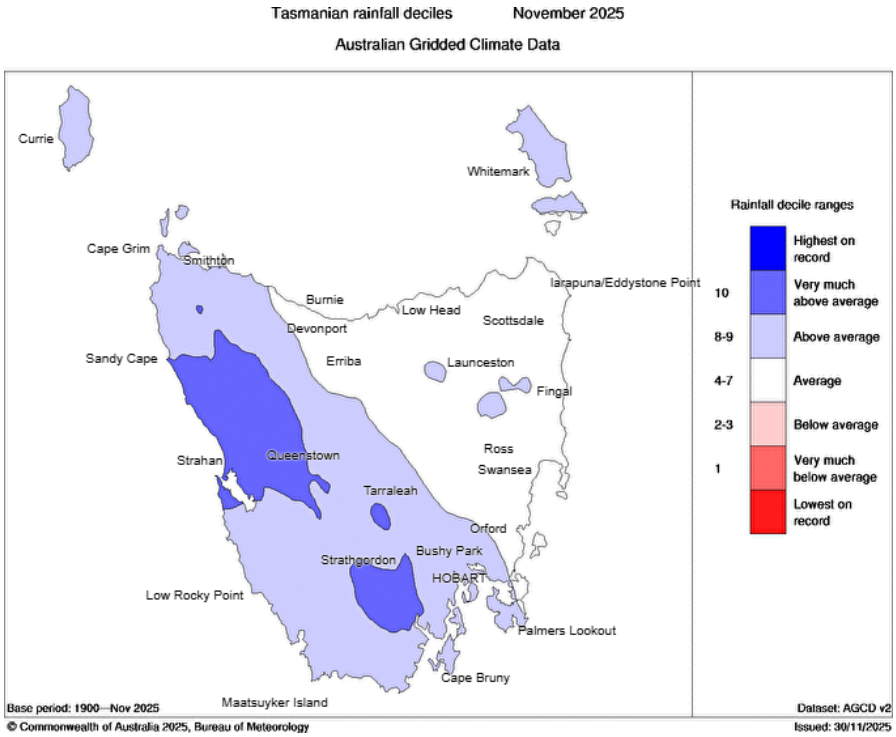


FIGURE 1: TASMANIAN RAINFALL DECILES FOR NOVEMBER 2025

12 monthly rainfall deciles for Tasmania

For the 12-months from December 2024 to November 2025, the total rainfall reflected the predominantly below-average rainfalls over the extended period, with large areas across the east, northeast, and central regions falling into the “very much below average” category. A small section in the southwest recorded its lowest 12-monthly rainfall on record, highlighting severe prolonged dryness in that area. Most of the state was classified as below average, with only a tiny patch in the south-central region showing above-average rainfall.

For agriculture, this prolonged dryness leading up to November 2025 rainfall events has meant increased reliance on irrigation and stored water, reduced pasture growth during key periods, and heightened impacts on crops and livestock over the last 12 months.

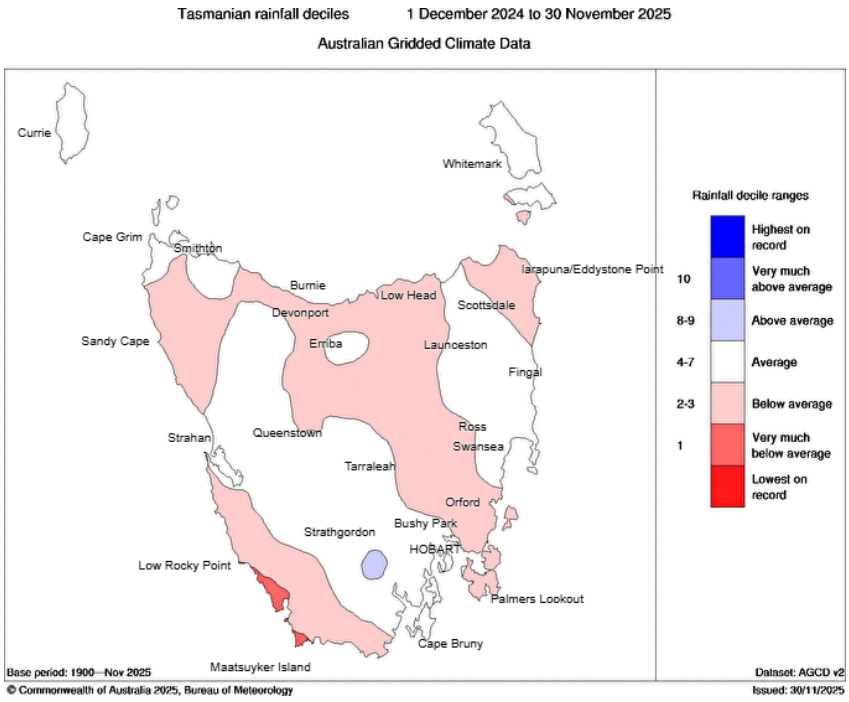


FIGURE 2: RAINFALL DECILES FOR THE 12 MONTHS TO END NOVEMBER 2025 FROM BUREAU OF METEOROLOGY

Long Range Rainfall and Temperature Forecast

The latest BoM long-range forecast for Tasmania (December 2025 to February 2026) indicates a neutral rainfall outlook, meaning there is no strong signal for above or below average rainfall across the State. This suggests roughly equal chances of wetter or drier conditions during summer. In contrast, much of Australia is expected to experience above-average rainfall in the north and east, while western regions are more likely to be drier. For Tasmania, this neutral outlook follows a wetter November, which helped replenish rootzone soil moisture and streamflow, providing a good starting point for the season.

Temperatures, however, are forecast to be warmer than average, with daytime temperatures likely above normal and overnight temperatures very likely to exceed the long-term average. This could increase evapotranspiration rates and irrigation demand, even with healthy soil moisture and near median to high streamflow in northern Tasmania.

Root Zone Soil Moisture:
In November 2025, soil moisture in the root zone was generally above average, with most western and southern regions showing strong positive anomalies. These areas are shaded in blue, indicating moisture levels well above normal, while central and eastern regions were mostly near average.

Runoff:
The November runoff map indicates a similar spatial pattern to October 2025, with a shift from widespread above average runoff towards more typical, near-average conditions across much of the State. Only the far North-east tip of Tasmania shows below average values, marking a modest local drying compared to surrounding areas.

Deep Layer Soil Moisture:
Despite recent improvements in surface moisture, Tasmania's deep soil moisture remained very much below average across most regions, which may pose long-term challenges for perennial crops and pastures. This highlights the importance on irrigation for summer production.

Standardized Precipitation Evapotranspiration (SPEI):
The Standardised Precipitation Evapotranspiration Index (SPEI, 12-month scale) confirms that most of Tasmania now sits within the normal range, reinforcing the transition away from the moderately dry conditions seen in late winter and early spring. Only small, isolated areas in the far South and South-west remain classified as dry to very dry, showing that while longer-term deficits have eased across the State, residual dryness lingers in a few southern districts.

Five Monthly Indicator:
The five-month rainfall trend has improved positively since October, with most areas of Tasmania trending positively within the normal SPEI classification range.

Overall Interpretation:
November 2025 consolidated the return to generally near-normal to wetter-than-normal conditions across Tasmania. The multi-month SPEI values show that the earlier statewide dryness has largely broken.

For further information please refer to the Australian Water Outlook (https://awo.bom.gov.au/).

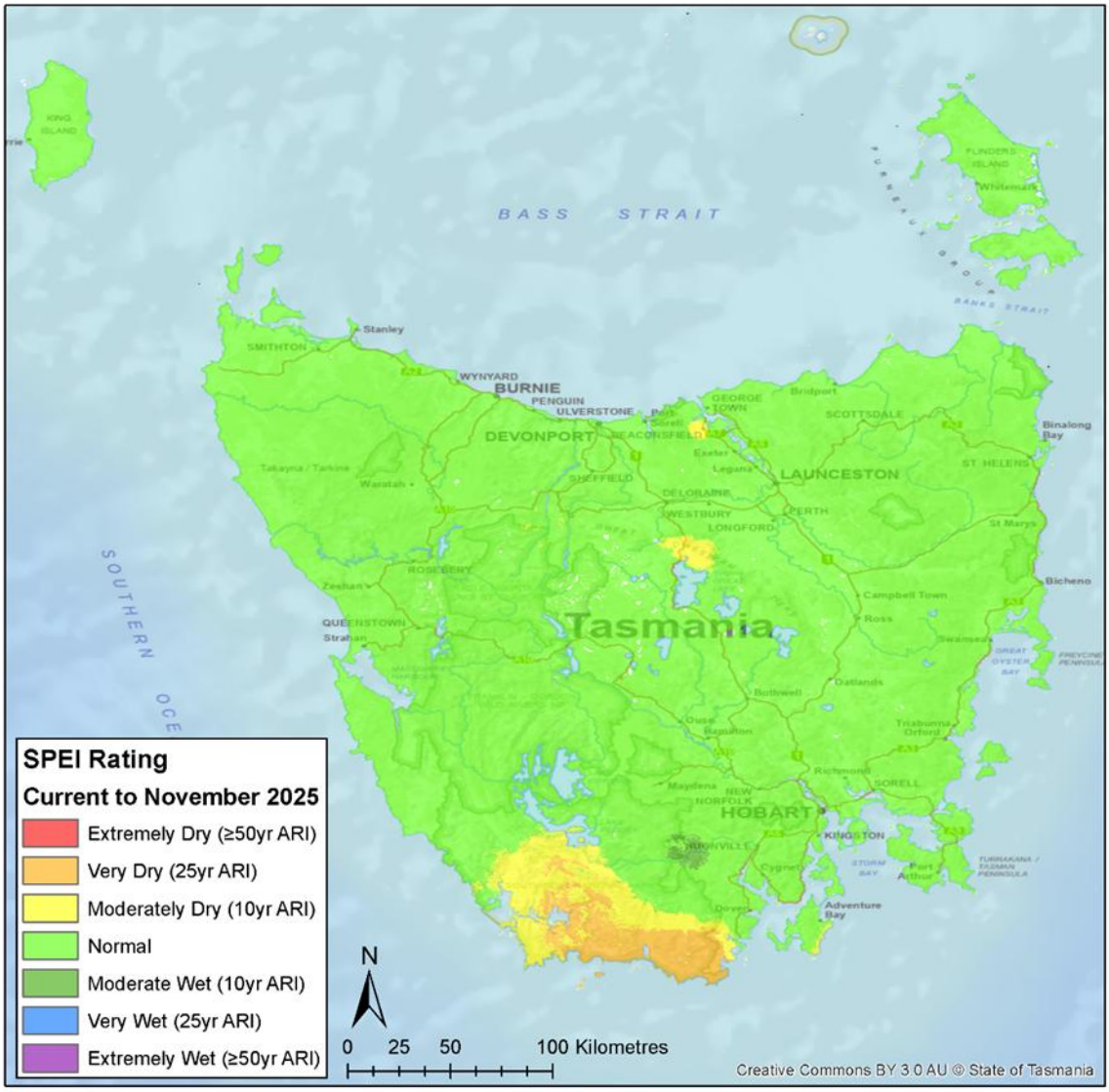


FIGURE 3: REGIONAL 12-MONTH STANDARDISED PRECIPITATION-EVAPOTRANSPIRATION INDEX (SPEI) TO END NOVEMBER 2025

Secondary Indicators

Hydrological Monitoring

Key Message: *Water access in November differed from last year, with more flood take notices and fewer restriction notices issued, reflecting the influence of 2025 rainfall patterns. Tasmanian Irrigation (TI) has reported improved dam storage levels, and all irrigation schemes commenced the 2025–26 season with full (100%) allocations.*

NRE Tas Water Operations

During the reporting period, the Water Compliance Team conducted 22 assessments, resulting in:

- 6 restrictions,

- 6 flood take notices
- 0 opportunistic take notices
- 6 easements
- no low flow warnings due to reduced river flows.

Assessment and notice figures differ from last year with flood take notices increasing slightly and restriction notices decreasing significantly. This change reflects higher river flows in November 2025 compared to November 2024 when below-average rainfall reduced flows and triggered more restrictions.

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

Tasmanian Irrigation (TI)

For November, all TI irrigation schemes are open and operating for the season. Every entitlement holder across all schemes has received a 100% allocation to their annual entitlement, reflecting favourable seasonal conditions.

The Southern Highlands Scheme has benefited from well-timed rainfall throughout October and November 2025. This enabled water harvesting and allowed the Scheme to reach full allocation, ensuring growers have the resources they need for a productive season.

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

Streamflow

In 2024-25, forecasts indicated mostly below-median flows across the State, particularly in the east and north-east, creating irrigation pressure and water shortages.

Compared to the same period last year, Tasmania's streamflow outlook for Dec 2025–Feb 2026 is markedly improved. Overall, water security is far better than last summer, reducing drought stress and irrigation demand, though eastern regions may still experience localised low flows.

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

Economic Indicators

***Key Message:** Stable economic environment in November and Tasmanian agriculture achieved stellar growth in 2024-25.*

Tasmanian primary producers with red meat exports continue to see positive trends similar to previous months. The exchange rate is stable, oil and shipping prices are moderating, domestic household spending on food is strong despite rising inflation. Bendigo Bank reported Tasmania's farmland remained the highest valued in the nation despite prices moderating due seasonal conditions and limited buyers in the market.

Agronomic Indicators

Key Message: *Feed conservation and lucerne quality continue to be a focus for producers with wet, and windy conditions across Tasmania delaying pasture growth and hay harvest. Hay prices remain steady.*

Persistent wet weather has delayed hay cutting, with producers focussed on conservation and lucerne quality as crops remain uncut and risk deterioration. Intermittent dry periods allowed limited fieldwork, and some irrigation resumed in areas like Elliott and Meander to hedge against uncertain rainfall. Overall, pasture management decisions around irrigation, grazing intervals, and feed planning will remain important as the season progresses.

According to the Dairy Australia Hay and Grain Report (28 November 2025), hay prices remain steady: cereal hay $200–$300/t, lucerne hay $300–$380/t, straw $100–$140/t, and pasture hay $200–$260/t.

The excessive wind experienced throughout September and October 2025 continued into November 2025, which has impacted crop growth and crop management practices. For example, Regulated Crops report that approximately 700 hectares of poppies were lost due to the wet conditions. Ongoing cold weather has hindered crop growth, which may delay harvesting in some locations.

Fertiliser prices in Australia remained mostly stable through November 2025, with subdued domestic demand influenced by mainland harvest activity and lower-than-expected moisture for summer cropping. Urea prices held firm.

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: *Rainfall has improved sentiment in most areas but south-east on a cautious watch.*

Farm Management Deposit accounts remain steady at 782, valued at approximately $108 million, and 37 loans totalling over $44 million have been approved since 2018 under the Regional Investment Corporation program.

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 across Bass Strait.

There are no known areas of concern for freight to King Island or Flinders Island as of 5 November 2025.

Cattle movements for King and Flinders Island 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

November 2025

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