Seasonal Conditions Insights Snapshot

February 2026

KEY POINTS

Tasmania experienced a generally dry summer during February 2026, with rainfall below the long-term average for parts of the East and North. Temperatures were mixed: maximums were warmer than usual, while minimums were comparatively cool, with several sites recording record low summer minimum temperatures. Across the March 2025–February 2026 period, many agricultural regions remained drier than average, particularly the Tasman Peninsula, parts of the East Coast and the North. Long range forecasts indicate an increased likelihood of below average rainfall across much of southern Australia heading into autumn, alongside a heightened chance of unusually warmer than average temperatures.

Soil moisture dropped to below average across the West, North and East, with very low levels along the Northern and North Eastern coastal fringe. Runoff patterns also signalled increasing dryness, with below average streamflow across the Eastern half of the State and very much below average flows emerging along parts of the East Coast. While the 12-month Standardised Precipitation Evapotranspiration Index (SPEI) remains mostly near normal, pockets of moderate to extreme dryness have expanded, and broader indicators show conditions trending toward the dry end of the normal range.

Tasmania's agronomic conditions in February 2026 reflected a cool spring season that continued to delay later maturing crops, even as harvest progressed across most crop types. Irrigated pastures maintained steady growth, while dryland pastures remained largely dormant, with late month rainfall offering only minimal improvement. Growers with remaining water allocations used the post-harvest window to establish follow on crops (for example kale and dual-purpose cereals). Notable results included a record pyrethrum harvest, while demand for quality new season hay increased without significant price movement. The wine sector reported an unusually cool spring and mild summer, contributing to slow ripening and an expected late vintage start, with good quality anticipated.

Social and industry sentiment remained generally positive, supported by strong red meat prices and better than expected harvest yields. Farm Management Deposit activity showed only minor changes, and Regional Investment Corporation (RIC) loan approvals remained steady. While producers are awaiting a rainfall event to break pasture dormancy, those still harvesting prefer conditions to remain dry a little longer.

Department of
Natural Resources and Environment Tasmania

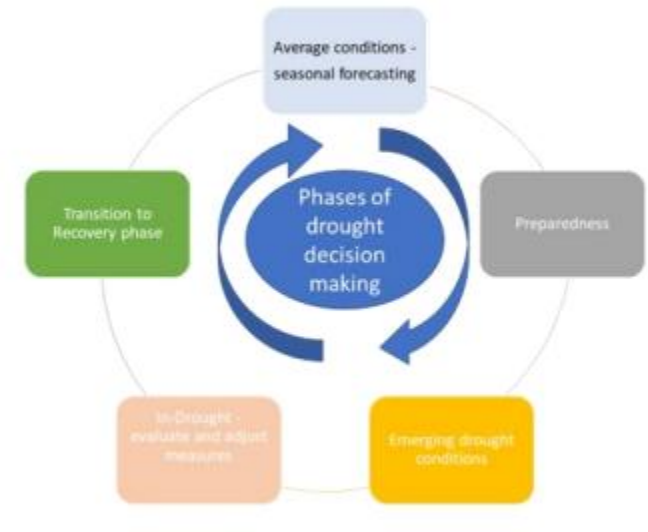
Tasmanian
Government

Freight and logistics operations remained stable for February 2026, with no reported disruptions, and livestock movement trends were typical for Flinders Island and slightly below average for King Island. This was due to producers having to rebuild stock numbers after the previous year's drought conditions.

Overall, February 2026 consolidated and broadened the drying signal across Tasmania. Climatic and hydrological indicators suggest that if current patterns persist, dry conditions may heighten concern about the timing and strength of the autumn break.

Under the *Monitoring Seasonal Conditions and Drought Framework*, when all indicators (primary and climatic) are combined, it shows the South East, East Coast, Tasman Peninsula and North East are experiencing ongoing dry conditions These areas have had prolonged below-average rainfall over the past year, moderate to low plant growth, and moderate evapotranspiration due to cooler seasonal temperatures. As production conditions are tightening and the five month Standardised Precipitation Evapotranspiration trend remains positioned toward the lower end of this range, (indicating a shift toward drier conditions) these areas are currently in the 'preparedness' phase of the drought cycle.

Many producers have rebuilt hay and silage stocks, which should meet supplementary feeding needs. However, if March and April rainfall is insufficient, there will be increasing concern from some producers about producing additional feedstocks for livestock heading into winter as soil temperatures fall. If average to below-average rainfall continues, runoff and soil moisture will keep declining, and more of the State may also shift into preparedness.



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

Primary (Lead) Condition Indicator

Precipitation

In February 2026, Tasmania experienced predominantly average rainfall, although drier-than-usual conditions were observed across parts of the East and North, while Flinders Island recorded above-average totals. The statewide rainfall amounted to 52.9 mm, representing a 17 % deficit relative to the 1961–1990 average, yet it remained the wettest February since 2023.

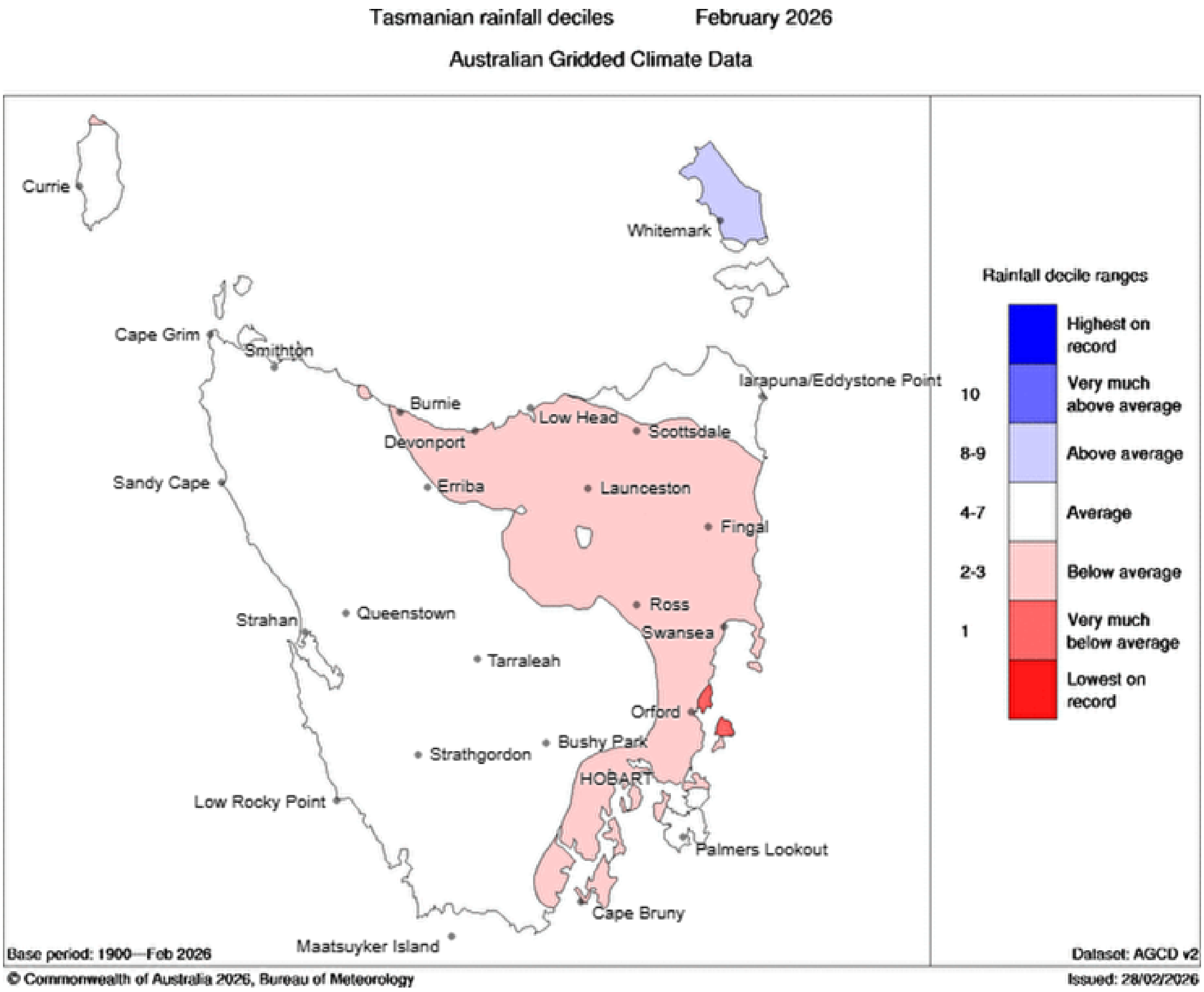


FIGURE 1: TASMANIAN RAINFALL DECILES FOR FEBRUARY 2026 FROM BUREAU OF METEOROLOGY

Temperature

Temperature patterns were varied: mean maximum temperatures were above average across most regions, resulting in the state's highest February maximums since 2023. Whereas mean minimum temperatures ranged from average to below average, contributing to the lowest February minimums since 2017 – and several site-specific record lows. A cold front on 11–12 February introduced cooler conditions, delivered significant rainfall to selected regions, and produced light snowfall over elevated terrain.

Season Summary - Summer

Across the broader summer period of 2026, Tasmania experienced notably dry conditions, particularly in the North, with statewide rainfall 26 % below average—its driest summer since 2022–23. Mean maximum temperatures for the season were above average across nearly all districts, while mean minimum temperatures - although generally near average – were still the lowest recorded for a Tasmanian summer, since 2008–09. Several sites, including Launceston Airport, registered record-low summer minimum temperatures.

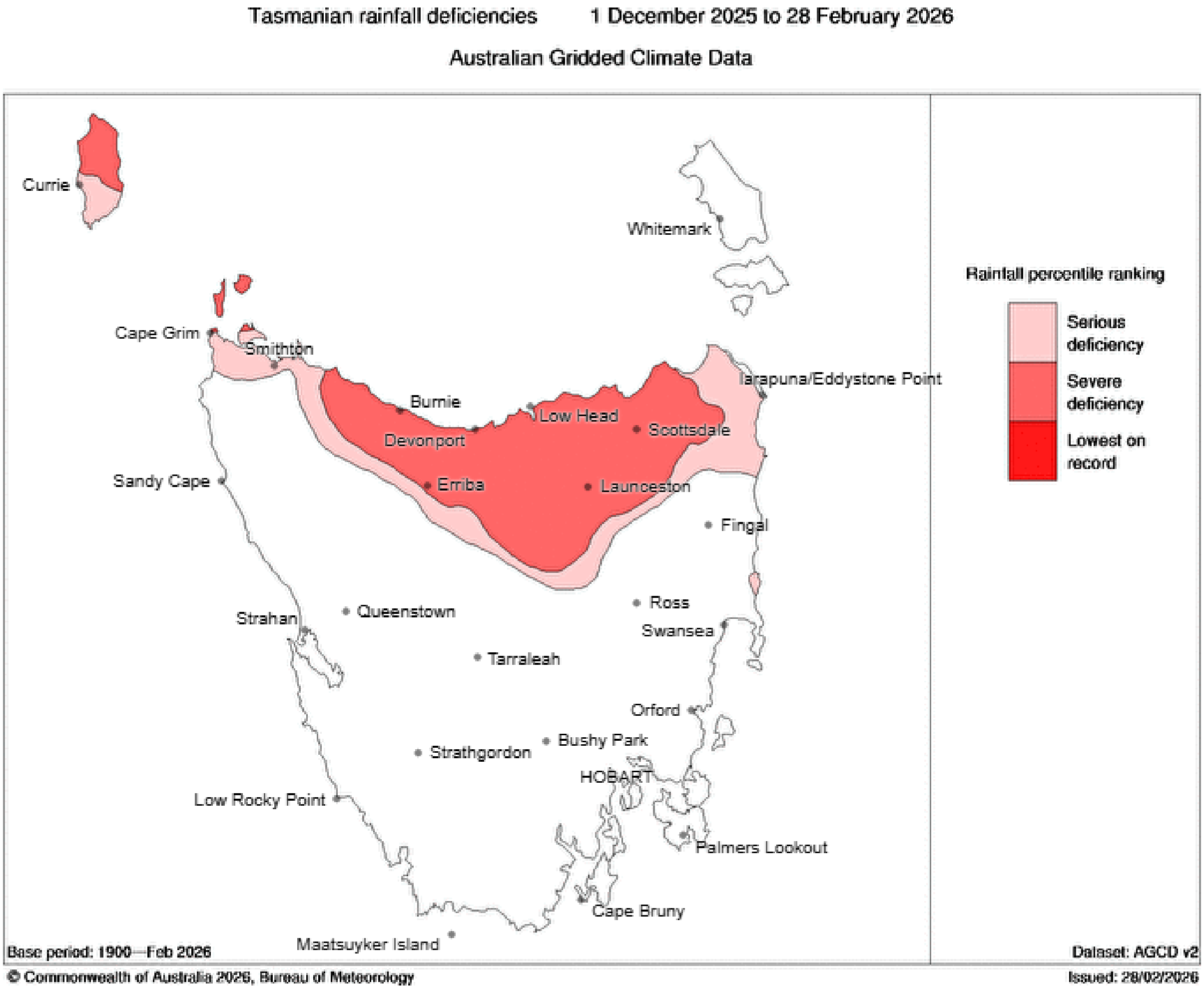


FIGURE 2: RAINFALL DEFICIENCIES FOR 3 MONTHS TO END FEBRUARY 2026 FROM BUREAU OF METEOROLOGY

12 monthly rainfall deciles for Tasmania

During the 12-month period from March 2025 to the end of February 2026, substantial portions of Tasmania's agricultural regions continued to receive below-average rainfall. The Tasman Peninsula, along with pockets of the East Coast and Northern areas, experienced particularly pronounced deficits, whereas Flinders Island

and the State's Western regions, extending to the Huon Valley, recorded rainfall close to the long-term average. These drier conditions have also been reflected in on-ground observations.

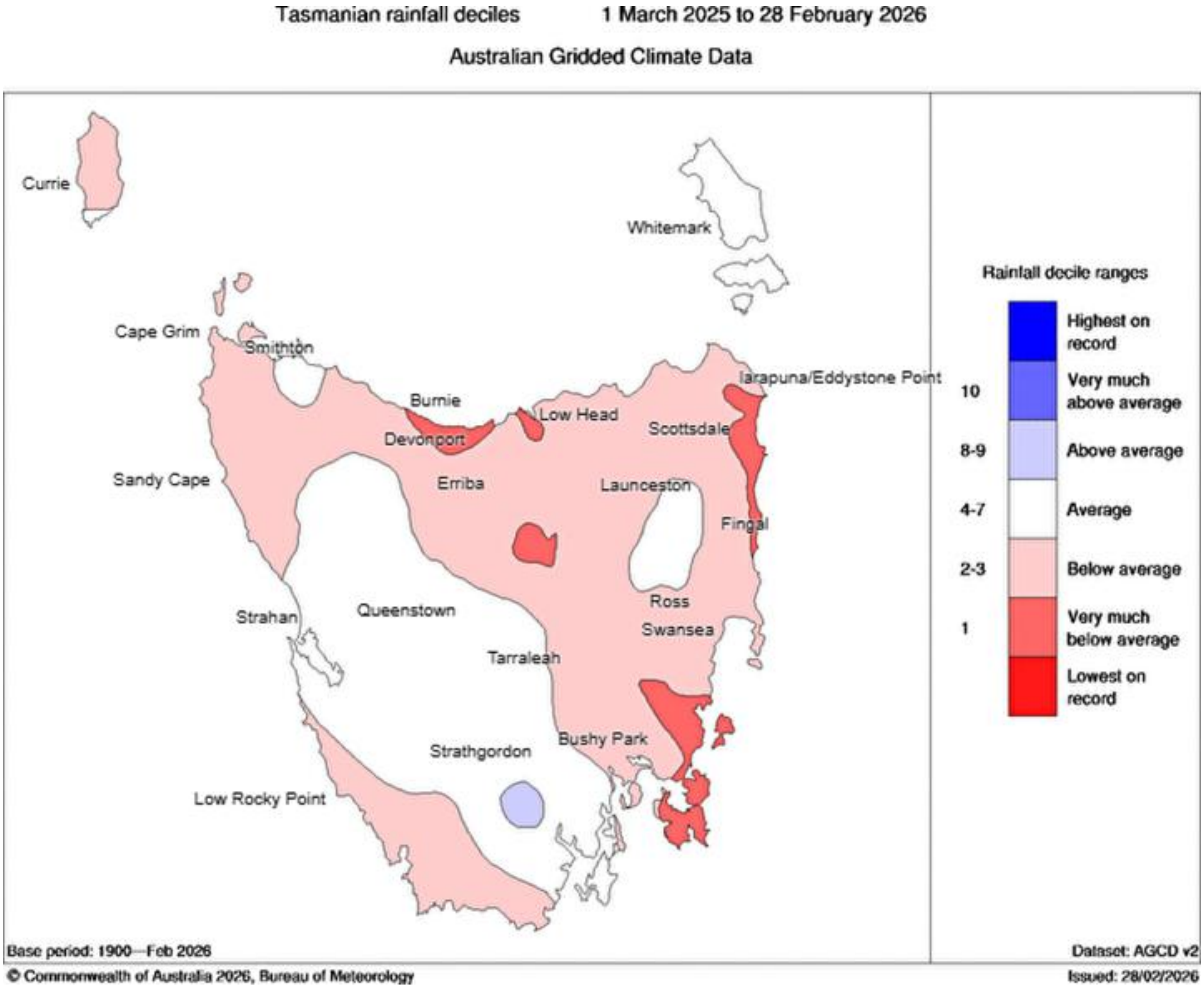


FIGURE 3: RAINFALL DECILES FOR THE 12 MONTHS TO END FEBRUARY 2026 FROM BUREAU OF METEOROLOGY

Long Range Rainfall and Temperature Forecast

According to the Bureau of Meteorology (BoM) long-range forecast issued on 26 February 2026, autumn rainfall is likely to be below average (60 to 80% chance) for most of southern Australia, except parts of the East Coast. There is no clear forecast signal for March for most of southern Australia, with a drier-than-average forecast signal strengthening and expanding to cover much of Australia from April.

Much of the southern half of Australia has an increased chance of unusually high maximum temperatures (over 40% chance), with the strongest chances in north-eastern Tasmania and south-western parts of Western Australia (over 70% chance). Minimum temperatures are likely (60% to greater than 80% chance) to be above average across much of Australia, with lower chances (closer to 50%) across parts of Australia's north, south-east and interior.

Soil Moisture:

Soil moisture conditions also weakened further during February 2026. Below average soil moisture is now evident along the West Coast, North Coast, North-East and East Coast, indicating that drying is no longer confined to the North and East alone. Very much below average soil moisture has developed along the northern to north-east coastal fringe, including Launceston and its eastern surrounds, highlighting areas where soils have dried markedly compared with previous months. Overall, the soil profile across Tasmania shows clear signs of cumulative drying, especially in coastal and lowland districts.

Runoff:

Runoff in February 2026 continued the drying trend observed in recent months. Below average conditions became established across the Eastern half of Tasmania, including the North, North East, East Coast, Upper Derwent and South Coast, signalling a broader spread of hydrological stress. Although the North West, North, North East and Upper Derwent shifted from very much below average to below average runoff – indicating a slight easing in intensity, small pockets along the East Coast, particularly around Great Oyster Bay, have now declined to very much below average streamflow.

Standardised Precipitation Evapotranspiration (SPEI):

The 12-month Standardised Precipitation Evapotranspiration Index (SPEI) remains mostly within the normal range, broadly like January 2026. However, conditions have reverted to extremely dry in a south coastal pocket around the South Cape hinterland, signalling renewed long-term pressure in that area. In addition, pockets of moderately dry SPEI values have spread along the East Coast from Eddystone Point to Bicheno, and another moderately dry pocket has emerged around the Tasman Peninsula. These changes indicate that, while much of the State still appears near normal on a 12-month basis, the spatial extent of emerging longer-term dryness is growing.

Five Monthly Indicator:

Most sites continue to fall within a broadly ‘normal’ classification. However, the overall trend remains positioned toward the lower end of this range, indicating a shift toward drier conditions. This is consistent with the patterns depicted in the SPEI map, as well as the run-off and soil-moisture assessments.

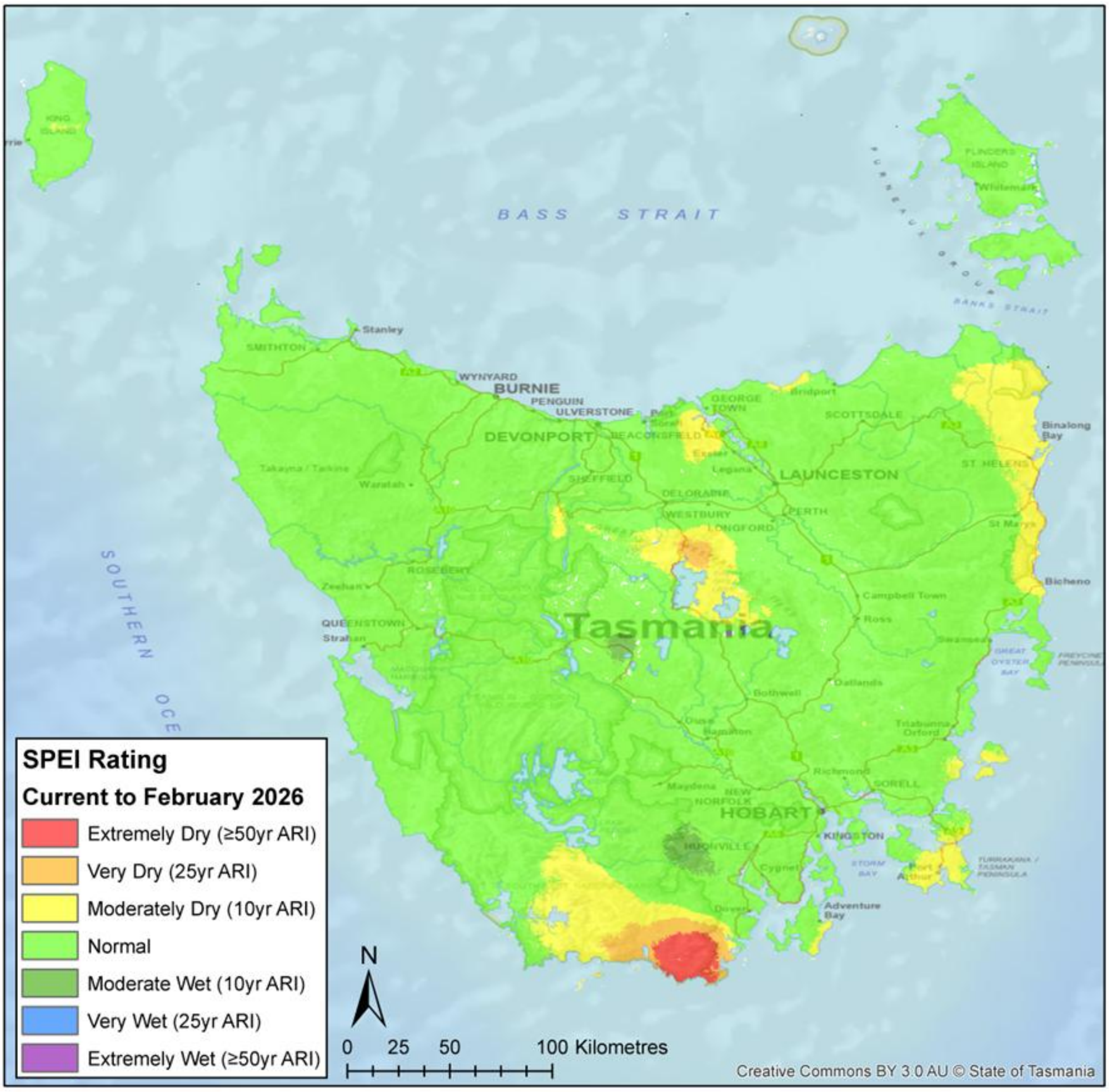


FIGURE 3: REGIONAL 12-MONTH STANDARDISED PRECIPITATION-EVAPOTRANSPIRATION INDEX (SPEI) TO END FEBRUARY 2026.

Secondary Indicators

Hydrological Monitoring

Key Message: *Record irrigation water delivered through Tasmanian Irrigation schemes, with river catchments experiencing drier conditions and associated restrictions.*

NRE Tas Water Operations

During the reporting period, the Water Compliance Team conducted 86 assessments, resulting in:

- 53 restrictions
- 0 flood take notices.
- 0 opportunistic take notices
- 18 easements
- 9 low flow warnings due to reduced river flows.

It is typical for a high volume of assessments to occur in February, as trigger values are more frequently reached under dry seasonal conditions, and correspondingly, an elevated number of water restrictions is also expected. In February 2026, the trigger values were met more often than usual, leading to an observable increase in both assessments and restriction notices. Although assessment and restriction numbers are higher than those recorded in 2025, the totals for 2026 remain within the expected range for the summer period.

Tasmanian Irrigation

Tasmanian Irrigation (TI) delivered 24,349 megalitres of irrigation water to Tasmanian farmers in January - the highest volume in any month on record, 32% more than January 2025 and double the amount supplied in January 2024. A mild and cool early summer, the seventh driest January on record since 1900, maximum January temperatures above average for most of the State, low sub-soil moisture and increased crop plantings all contributed to this record water delivery month. TI delivered a year-to-date total at the end of January 2026 of 54,925 megalitres and expected the February 2026 figures to reflect on-going high demand.

TI's Operations Team is closely monitoring all dam levels and is confident that all have sufficient water to meet irrigator demand in line with their entitlement allocation across the State.

BoM Streamflow Observations for Tasmania

BoM's seasonal streamflow forecast indicates that Northern Tasmania is expected to continue to experience low streamflow conditions from February to April. Flows were low at 44% of sites in February, largely in the West and South East of Australia including Tasmania. Flows were near median at 34% of the sites, mostly in the East of Australia including northern Tasmania. The streamflow levels reflect both reduced rainfall and drier catchments.

Economic Indicators

Key Message: *Export markets have seen some significant events; however, Tasmanian exports are still resilient.*

The US has changed its tariff rate with most countries now subject to a 15% tariff. Australia is still subject to a 10% tariff. Beef imports remain tariff free. There is still strong demand for beef in the US and prices are firm.

In late February 2026, geopolitical tensions in the Middle East impacted trade with Tasmanian sheep-meat products particularly affected. Alternative markets have been found for some products such as mutton. The diversity of Tasmania's trade partners is supporting the local producers and local prices have remained strong due to demand from restockers.

Global trade for dairy products was strong with prices firm for most products.

Of concern to producers is the strengthening of the Australian dollar which affects the competitiveness of Australian exports.

Agronomic Indicators

Key Message: *Harvest is mixed with later crops still facing delays due to cool season.*

Irrigated pasture growth rates remained steady throughout the month, with dryland pastures mostly dried out or dormant. Rain towards the end of the month brought a welcome green tinge, however, follow up rain is needed to grow any more pasture of substance. Evapotranspiration is remaining high, with most areas around 24-30mm per week in loss.

Harvest activities are continuing across most crop types, including spring barley, poppies, and a range of seed crops. Growers with access to irrigation are using the post-harvest window to establish follow-on crops, particularly cereals and fodder crops like kale and turnips.

Pyrethrum has set a new harvest record of 139kg, with the cooler conditions benefitting the North Motton record crop.

The Dairy Australia Hay Report highlights that local hay contractors are receiving steady enquiries for quality new-season hay, with rainfall and cooler conditions affecting hay that has was left in paddocks. This is keeping prices firm, with lucerne ranging between $200-260/t and pasture hay $130-190/t.

The Wine sector has reported that it has been an unusual season, with a very cool spring affecting flowering and fruit set, resulting in some uneven bunch development. A mild summer combined with minimal rainfall has contributed to slow ripening and generally dry conditions. Vintage is expected to commence in March 2026, beginning with fruit destined for sparkling wine, and will continue until May with good quality anticipated.

Social Indicators

Key Message: *sentiment remains positive with better-than-expected harvest yields reported and red meat prices staying high.*

As of 31 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 for early withdrawal without losing tax concessions. The latest statistics from DAFF, as of 31 January 2026, indicates there are 773 FMD accounts for Tasmania with a total value of $106,300,000. This is a decrease of four accounts of $356,000.

The Regional Investment Corporation (RIC) advised that since 1 July 2018 to 31 January 2026, it had approved 37 loans valued at over $44 million in Tasmania. The level of loans remains steady from previous months.

Sentiment amongst producers remains positive due to red meat prices and good harvest yields. Many are now eagerly awaiting a decent rainfall event to freshen paddocks up and bring pasture out of summer dormancy, but those still harvesting will want the rain to hold off until crops are in.

Freight and Logistics

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

As of 6 March 2026, there are no known areas of concern for freight to King Island or Flinders Island.

Cattle movements for King Island remain lower than average as producers are rebuilding herds from the previous year of drought conditions being experienced. Flinders Island appears to be tracking as normal.

Prepared by:

AgriGrowth Tasmania
Department of Natural Resources and Environment Tasmania

March 2026

AgriGrowth Tasmania values the contribution of stakeholders and encourages feedback via Farmpoint. Your input is essential to ensure this report remains accurate, relevant, and beneficial to the Tasmanian agricultural sector. We welcome your comments on what is working well, areas for improvement, and any additional topics you would like to see included in future updates.