

Seasonal Conditions Insights Snapshot

JANUARY 2026

KEY POINTS

Tasmania had generally dry conditions in January 2026, with most areas recording below to very much below average rainfall. The Midlands and parts of the east coast were closer to average rainfall, and a small above average area of rainfall in the Fingal Valley was linked to one local event rather than a wider improvement.

January 2026 temperatures were warmer than usual across the State, which reduced soil moisture, slowed ground cover recovery and lowered runoff. Over the 12 months to January 2026, conditions stayed mostly dry. Forecasts suggest this pattern is likely to continue, with the Bureau of Meteorology (BoM) expecting below average rainfall and above average temperatures for autumn. These conditions will increase evapotranspiration and add more pressure on water supplies and growing conditions for pastures and crops.

Water availability tightened further during January 2026, with more irrigation water restriction trigger thresholds being met and increased restriction notices compared with January 2025 (when unseasonal rain temporarily eased pressures enabling opportunistic takes). Tasmanian Irrigation (TI) storages declined across most regions due to high summer demand and reduced inflows, with the most significant drops occurring in the south and east. Streamflow observations and seasonal forecasts point to predominantly below-average flows continuing into March 2026, reflecting both drier catchments and reduced rainfall.

Agricultural conditions mirrored the dry weather, with dryland pastures browning off and entering dormancy typical for summer, while irrigated pastures continued performing strongly. Producers increasingly relied on irrigated pasture and fodder crops to maintain livestock growth rates, and paddock preparation commenced for autumn sowing post-harvest.

Despite the dry conditions, hay production has been first rate, with standout straw and pasture hay yields—particularly in the far northwest—driving strong supply. Grain harvesting conditions improved later in January 2026, with canola, wheat and barley yields exceeding expectations due to extended cool spring conditions in 2025 supported by timely early-summer rainfall. Some crops started harvest after delays due to the cooler weather and longer crop maturity times.

Producer sentiment remains positive overall, supported by strong red meat prices and better-than-expected crop performance. Rainfall would be welcomed to refresh pastures and support the transition into autumn, though those in broadacre cropping still completing harvest are hoping the autumn break holds off until the remaining crops are off paddocks and stored in silos.

Under the Monitoring Seasonal Conditions and Drought Framework, when all indicators (primary and climatic) are combined, the north east shifts to 'preparedness' conditions and the south east and the Tasman Peninsula also continue in a preparedness phase. If conditions of below average and very much below average rainfall continue to occur in coming weeks, the remainder of the State may shift to Preparedness conditions.



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

Primary (Lead) Condition Indicator

Precipitation

Rainfall deciles for Tasmania in January 2026 indicate widespread rainfall deficiency across the State, with only limited areas recording near-average rainfall. Most of the west, north-west, central north, and north-east experienced very much below-average rainfall.

The Midlands and much of the East Coast recorded average rainfall overall. A small pocket within the Fingal Valley showed above-average rainfall, which was likely the result of a localised, short-duration rainfall event rather than sustained wet conditions and therefore represents an isolated anomaly.

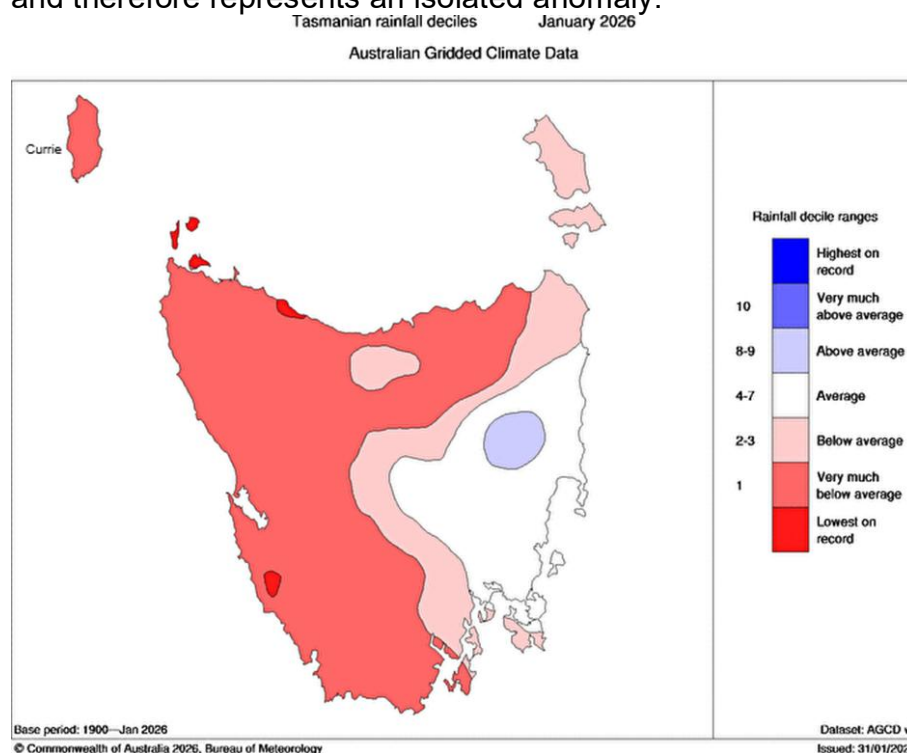


FIGURE 1: TASMANIAN RAINFALL DECILES FOR JANUARY 2026 FROM BUREAU OF METEOROLOGY

Temperature

Mean maximum temperatures in January 2026 were above average for most of Tasmania, very much above average across the north-west, and average for most of the east coast.

Mean minimum temperatures in January 2026 were above average across the Tasmanian mainland and average for most of King Island, with the Island recording its lowest January 2026 daily minimum temperature ever.

12 monthly rainfall deciles for Tasmania

The 12-month rainfall map for February 2025 to January 2026 indicates that it has been a predominantly dry 12-month period across Tasmania with widespread below average rainfall and pockets of very much below average rainfall. This is reflective in the observations of lack of ground cover in some areas and is also demonstrated in the soil moisture and run off maps.

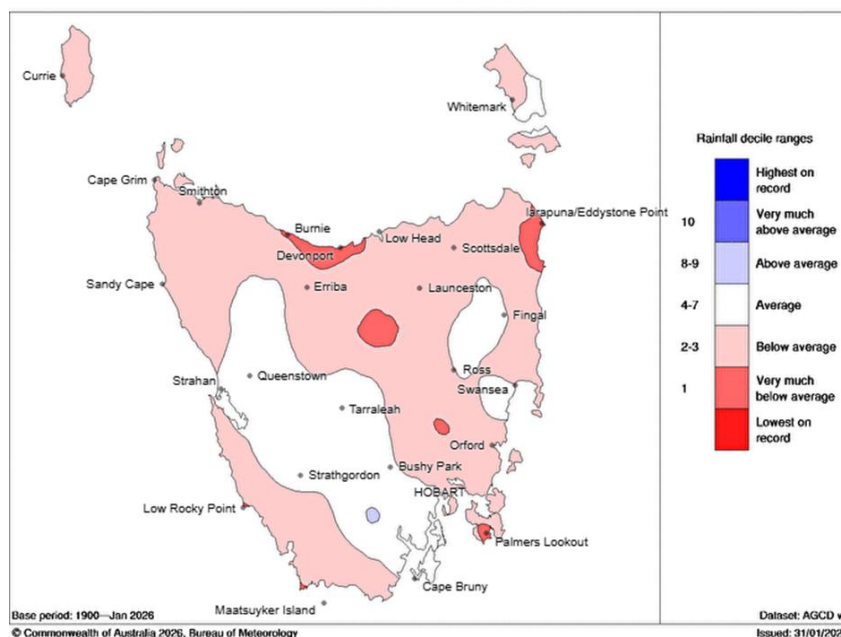


FIGURE 2: RAINFALL DECILES FOR THE 12 MONTHS TO END JANUARY 2026 FROM BUREAU OF METEOROLOGY

Long Range Rainfall and Temperature Forecast

According to the BoM long-range forecast issued on 8 February 2026, autumn rainfall is likely to be below average (60 to 80 per cent chance) for parts of southern and western Australia. Warmer days and nights are likely for Tasmania for February to April. Elevated daytime heat may increase evapotranspiration.

Soil Moisture:

Soil moisture reduced across most of Tasmania, pointing to a general drying of the landscape as summer progressed. Areas of below average soil moisture have begun to emerge along the northern coastal fringe and the far north-east, highlighting developing dryness in these zones. Pockets of the east coast continued to show below average soil moisture, consistent with the deficits observed in recent months and indicating ongoing vulnerability to short-term rainfall deficits.

Runoff:

Runoff conditions became considerably drier in January 2026. Below to very much below average runoff was widespread across the north-west, north, north-east and Upper Derwent, indicating reduced streamflow and tightening surface water availability in these regions. In contrast, the west and south-west remained close to average, suggesting a relative buffering of hydrological conditions there compared with the drying north.

Standardised Precipitation Evapotranspiration (SPEI):

The Standardised Precipitation Evapotranspiration Index (SPEI, 12-month scale) remains mostly within the normal range, but the moderately dry areas are now expanding across parts of the north and north-east. This reflects the cumulative effect of recent below average rainfall and higher evaporative demand in those

regions. The south-west remains classified as dry to very dry, although some of the previous pockets of extreme dryness have eased, suggesting slight longer-term improvement even as other areas begin to dry.

Five Monthly Indicator:

The five-month rainfall indicator for most areas continued the trend from December 2025 into January 2026, with below average five-month rainfall in eastern areas. The remainder of the state shows average to above average rainfall over the five-month period.

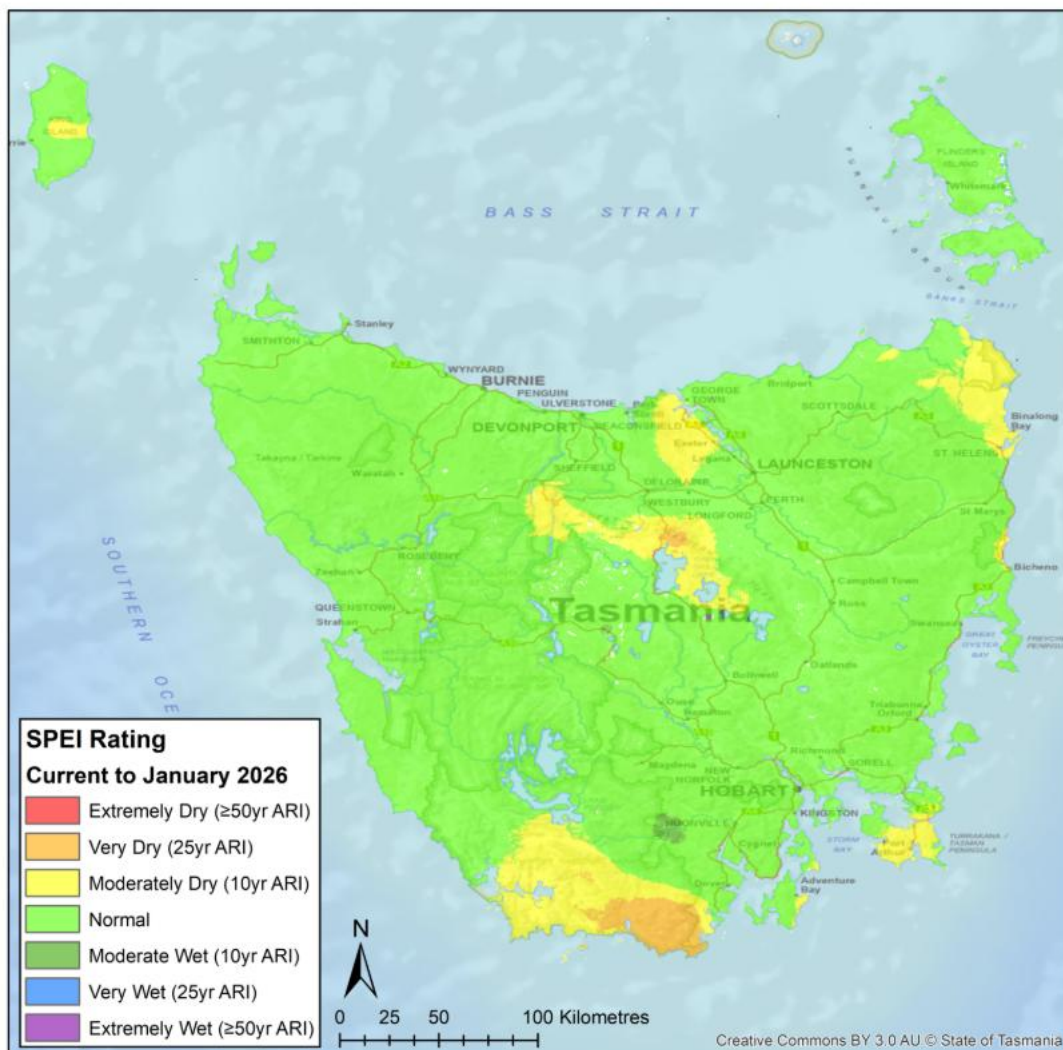


FIGURE 3: REGIONAL 12-MONTH STANDARDISED PRECIPITATION-EVAPOTRANSPIRATION INDEX (SPEI) TO END JANUARY 2026.

Secondary Indicators

Hydrological Monitoring

Key Message: *A high number of restrictions were issued during January 2026, which is consistent with typical January activity. With below average rainfall received for many parts of the State this has impacted river systems and consequently increased amount of water restrictions were issued.*

NRE Tas Water Operations

During the reporting period, the Water Compliance Team conducted 73 assessments, resulting in:

- 54 restrictions
- 0 flood take notices.
- 0 opportunistic take notices
- 11 easements
- 3 low flow warnings due to reduced river flows.

In January 2026, trigger values were met more frequently, resulting in a higher number of assessments and an increased volume of restriction notices. This rise in restrictions is consistent with the below-average rainfall recorded across the west, south, and much of the north during the month. In contrast, January 2025 experienced an unseasonal rain event that boosted river flows, eased multiple restrictions, and enabled a flood and opportunistic take to be issued. The absence of such unseasonal rainfall in January 2026 led to reduced river flows, contributing to more restrictions being issued and no flood or opportunistic takes.

Tasmanian Irrigation (TI)

TI delivered a record 24,349 megalitres of irrigation water in January 2026, which is 32 per cent more than January 2025 and double the amount supplied in January 2024. Total water delivery so far this season has surpassed 55,000 megalitres.

Demand was consistently strong across almost all TI's 19 operational schemes, with the Lower South Esk Irrigation Scheme up 117 per cent in January 2026, compared to the same period last year, the Don Irrigation Scheme up 94 per cent and Whitemore up 74 per cent.

Increased crop plantings, the mild and cool December 2025 delaying crop maturity and consequently harvest, low rainfall, and increased demand from new and existing customers contributed to the record water delivery.

BoM Streamflow Observations for Tasmania

The BoM's seasonal streamflow forecast indicates that Tasmania is expected to experience mostly below-average streamflow conditions through early 2026. According to recent BOM long-range reporting, streamflow in January 2026 was below average for most of southern Australia, including Tasmania, reflecting both reduced rainfall and drier catchments.

Economic Indicators

Key Message: *Interest rates increase, and Australian dollar strengthens. No impacts from the Chinese beef tariff.*

The Reserve Bank of Australia has increased the interest rate from 3.6% to 3.85%. An increase in the rate will mean producers with debt or looking to get a commercial loan will have higher debt repayments. In the medium term the increased rate could potentially impact household spending decisions such as choosing to eat out which may impact consumption of Tasmanian food and beverage products.

Australia's exchange rate with its major trading partners has strengthened. A stronger Australian dollar could potentially mean Tasmanian exporters are less competitive however imported inputs could be cheaper such as diesel and fertiliser. The Chinese beef tariff of 55% on beef imports exceeding the threshold quota is expected to impact Australian beef in the second half of the year. Currently, Tasmanian processors have not seen any market impacts to their products domestically and internationally.

Agronomic Indicators

Key Message: *Typical slowed growth for dryland pasture while irrigated pastures in peak production, exceptional hay yields, and strong early-year harvest results continue to support farm production.*

Dryland pasture growth slowed through January 2026 as dry conditions set in, causing many pastures to brown off and enter dormancy. This is typical for summer when rainfall is limited. Irrigated pastures, however, remain in peak production, with access to consistent water supporting continued growth. Producers with fodder crops have shifted livestock—particularly lambs—onto these areas to maintain growth rates. As grain harvest wraps up, many paddocks will likely be turned over quickly to establish fodder crops ahead of autumn.

Hay production progressed well over the period, with favourable conditions. Straw and pasture hay yields are reported as exceptional, with some growers in the far northwest baling up to three times the volume harvested at the same time last year. Significant quantities of grass straw are expected to enter the supply chain shortly. Pasture hay stocks are strong and purchasing activity has begun, with prices remaining steady. Lucerne is also trading steadily, although many growers have only completed one cut so far due to a delayed start to the season.

Grain harvesting in early January 2026 was somewhat intermittent, but became more consistent as warmer, settled weather arrived later in the month. Yields for canola, wheat and barley have been better than expected. A longer, cooler growing season combined with well-timed rain in November and early December 2025

appears to have supported strong grain fill. Canola oil content has been good, with most crops meeting market specifications.

Grass seed harvest began in late January 2026, with reported yields of 3 to 4 tonnes per hectare.

Pyrethrum harvest has been later than usual due to the cooler season but is now progressing well.

Poppy harvest remains slow to start, with the cooler December 2025 temperatures delaying maturity. The warmer conditions should aid the crop's maturation.

Maturation of fruit is 3 to 4 weeks behind due to the cool season start. While yields currently look promising, the next few months will determine the success of the wine vintage.

All main fruit categories are 2 to 3 weeks later than normal due to spring and early summer conditions being cooler than required for fruit maturation. Cherries are late, but the quality of fruit and volumes has been good and are expected to be up for the season. The late season has suited the comparatively late Chinese Lunar New Year (17 February 2026) for both domestic and export markets. Apple harvest is just commencing with yield and quality looking promising.

Fertiliser markets in January 2026 were characterised by strengthening global nitrogen prices driven by supply-side constraints, including port congestion and rising freight costs, while Australian urea demand remained subdued despite granular urea trading around A\$760–770/tonne.

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. The latest statistics from DAFF on 31 December 2025 indicates there are 777 FMD Accounts with a total value of \$106,656,000. This is a decrease from last month by 4 accounts valued at \$960,000.

Regional Investment Corporation report there has been no change in figures since January 2026. RIC has approved 37 loans valued at over \$44 million in Tasmania as of 31 December 2025.

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.*

There are no major ongoing concerns for freight to King Island or Flinders Island as of 16 February 2026.

Bass Island Line did have to reprioritise freight earlier in the month due to the shipment of three new wind turbine blades, however, this was unusual, and the company worked with customers to minimise impacts.

Bass Strait Freight has reduced load tonnages on some sailings in both directions between Flinders Island and Bridport because of the barway at the mouth of the Brid River. It is being managed to reduce impacts and monitored in case it reduces the capacity to move cattle.

Cattle movements for King Island remain lower than in previous years while for Flinders Island cattle movement numbers are higher than January 2025 due to better conditions enabling more stock to be turned off.

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