

THE ECONOMIC IMPORTANCE OF TASMANIA'S APIARY INDUSTRY

PRESENTATION TO TASMANIAN BEEKEEPERS' ASSOCIATION
ANNUAL CONFERENCE

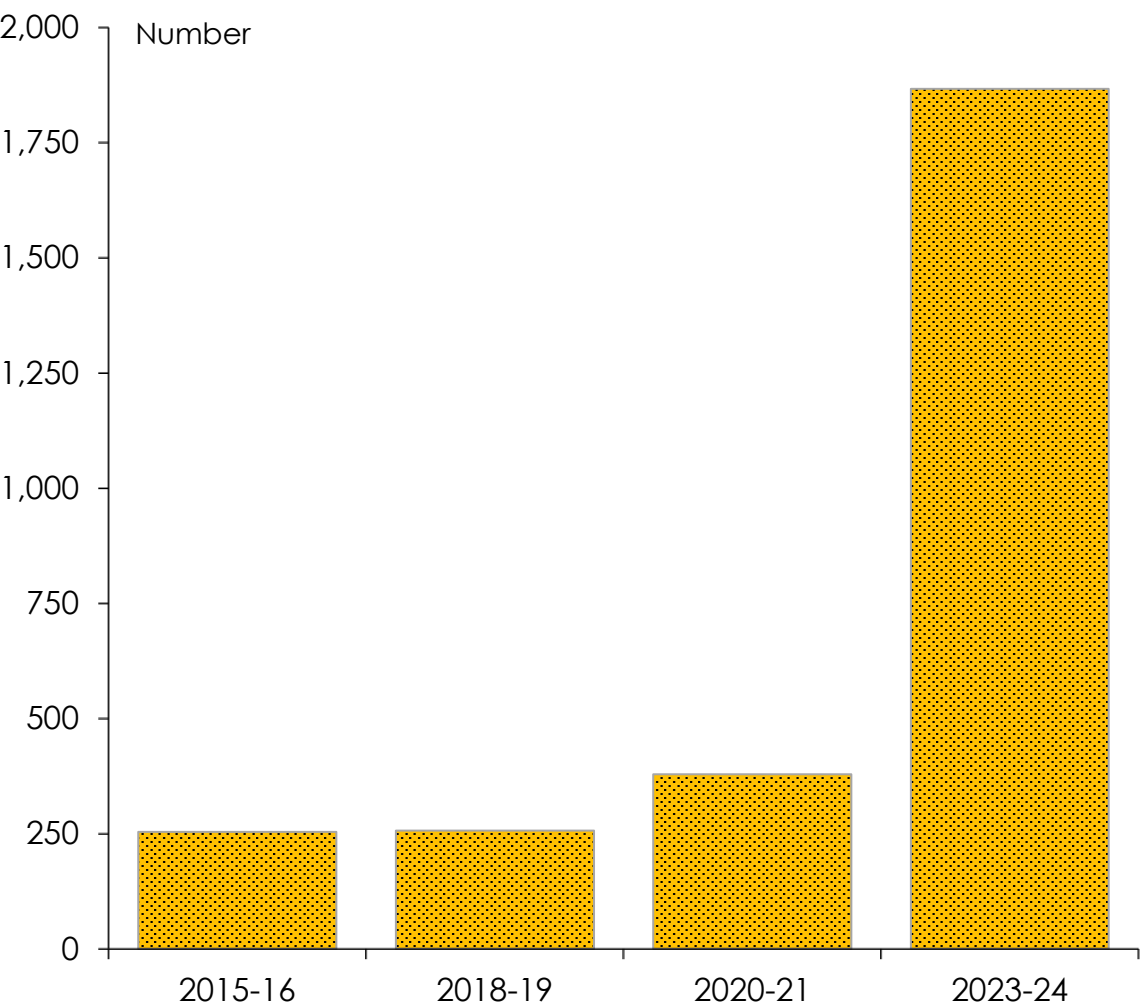
LAUNCESTON COUNTRY CLUB
10TH JULY 2026

SAUL ESLAKE

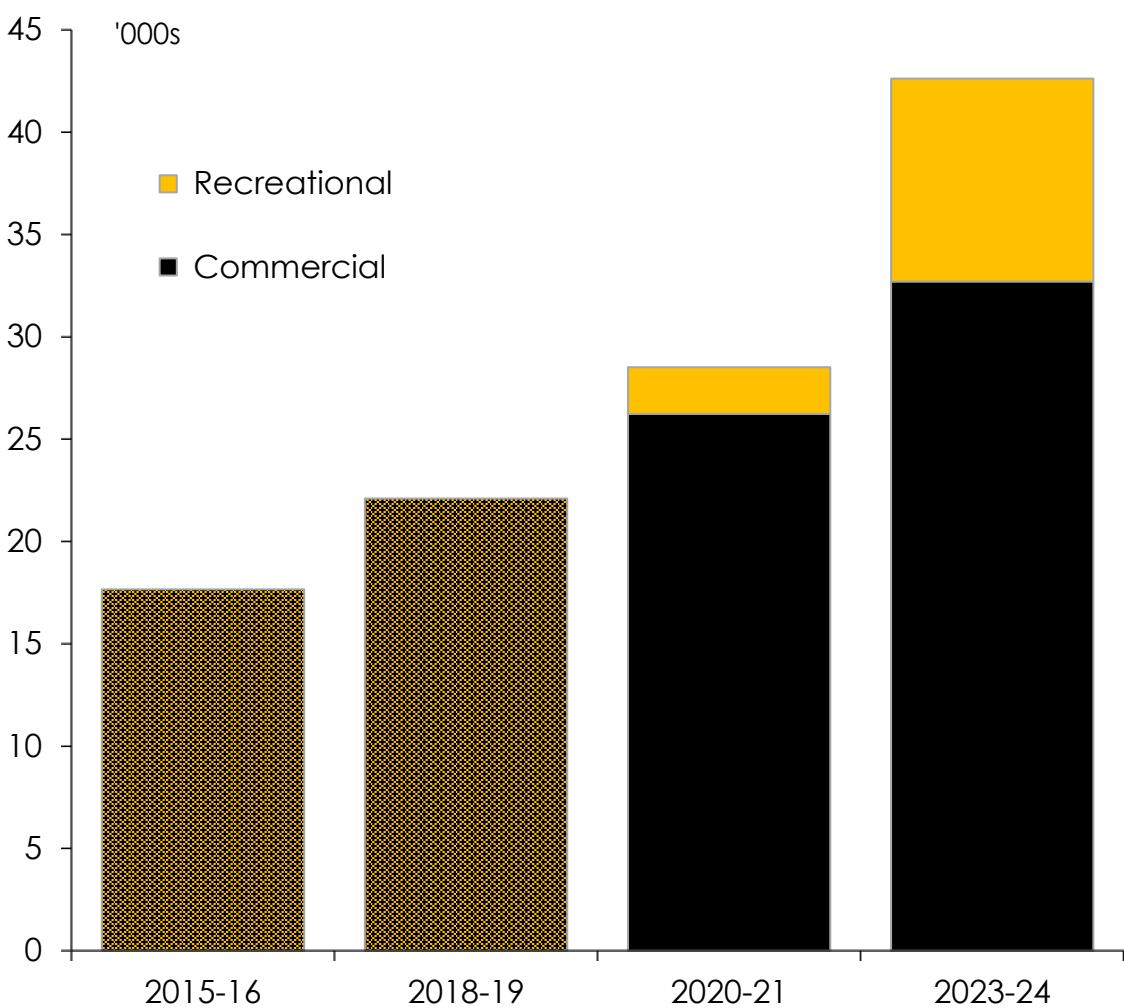
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Tasmania's apiary industry is small but growing

Number of bee-keepers



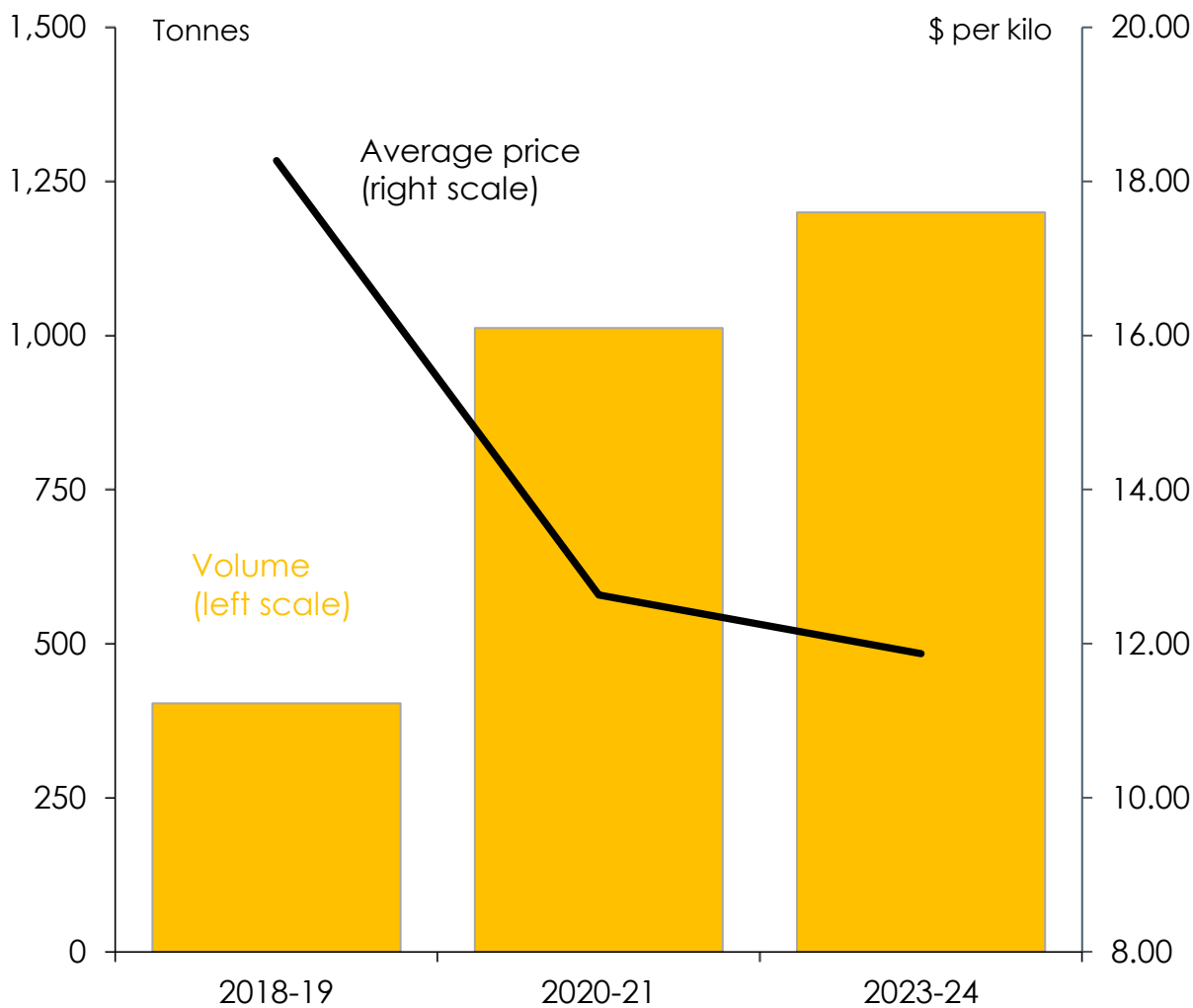
Number of hives



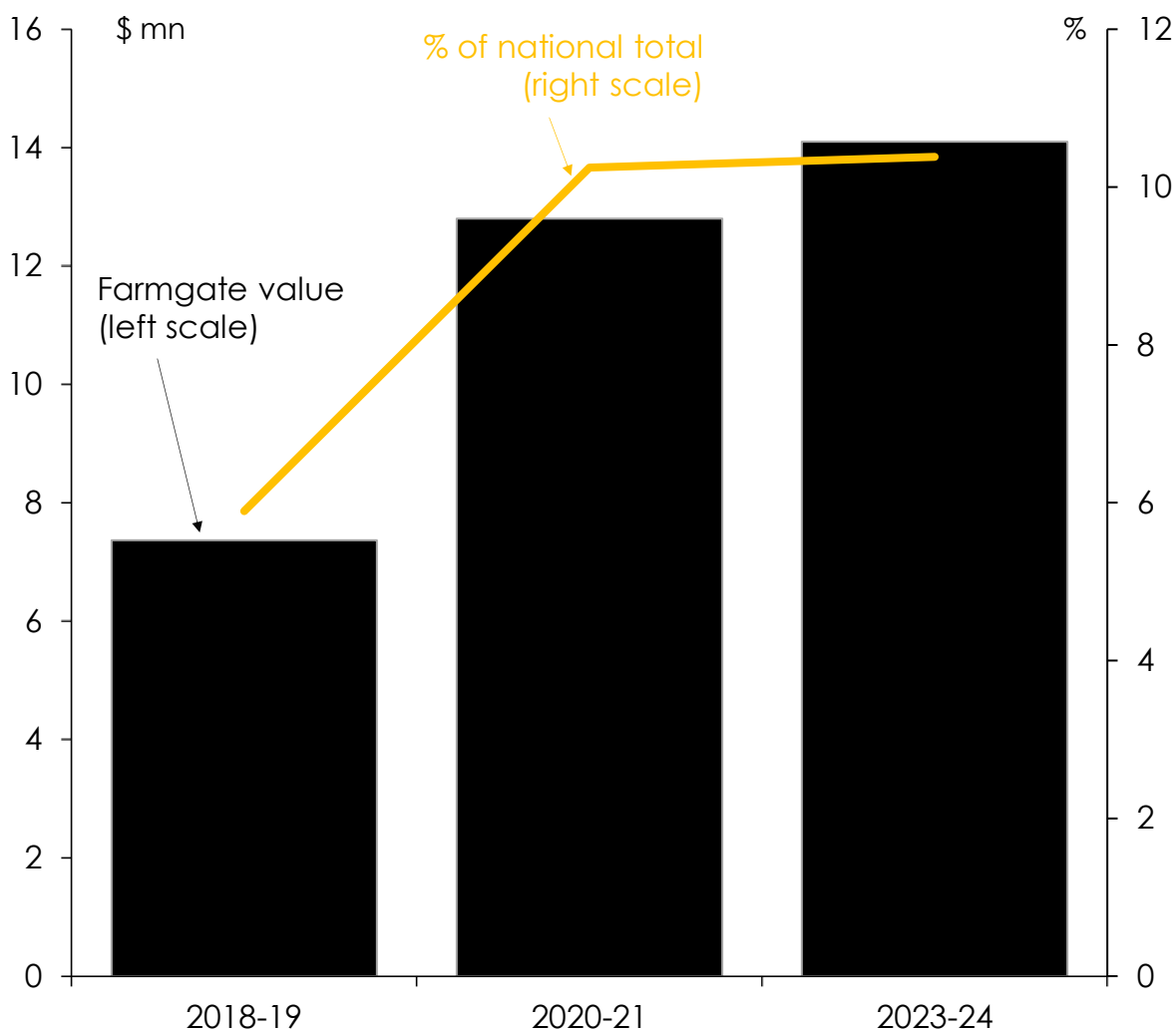
Note: Registration of hives became compulsory in 2022-23.
Source: Department of Natural Resources and Environment Tasmania, [Tasmanian Beekeeping Survey](#).

Honey production has been growing in both volume and value

Volume and average price of Tasmanian honey



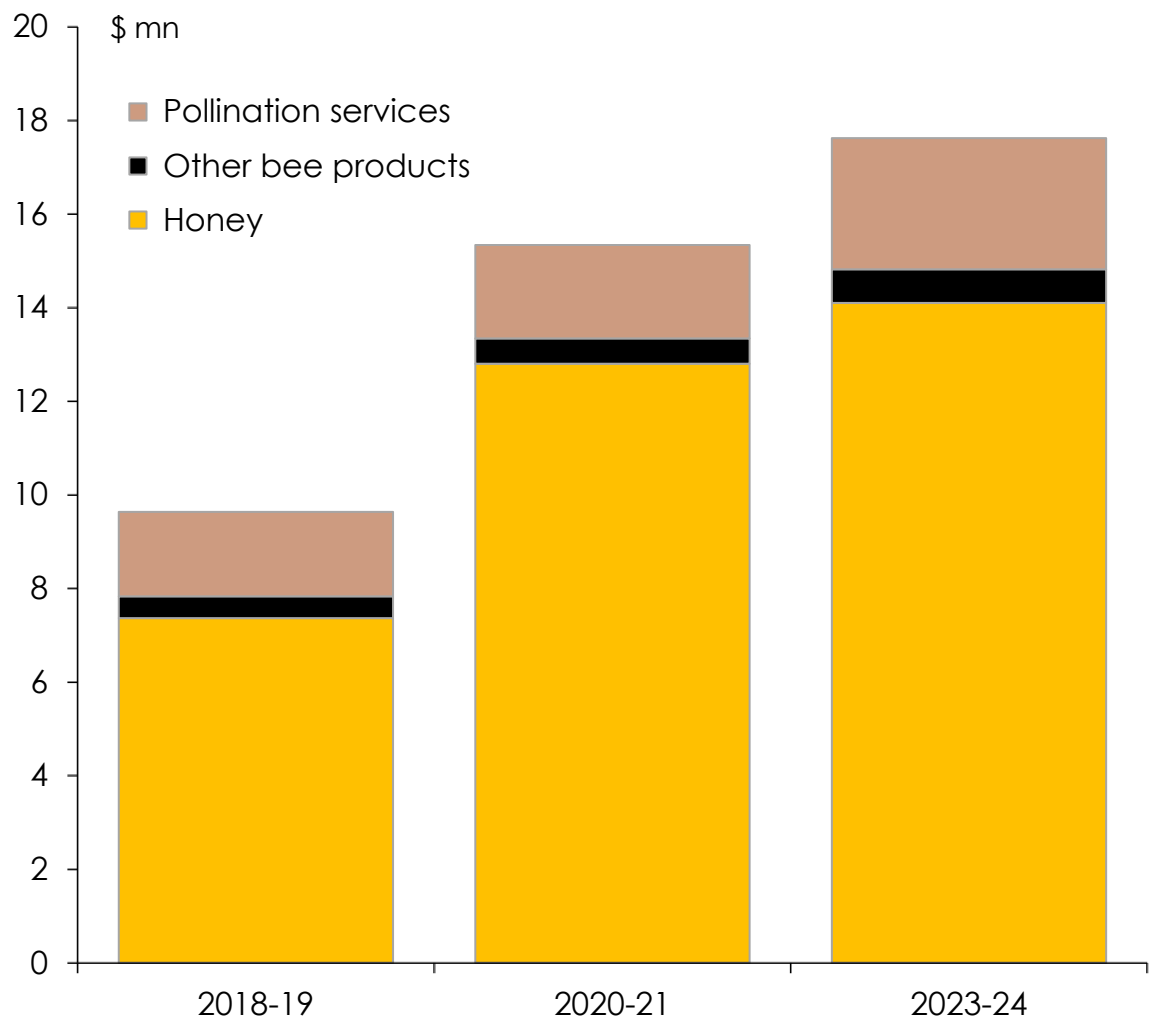
Value of Tasmanian honey production



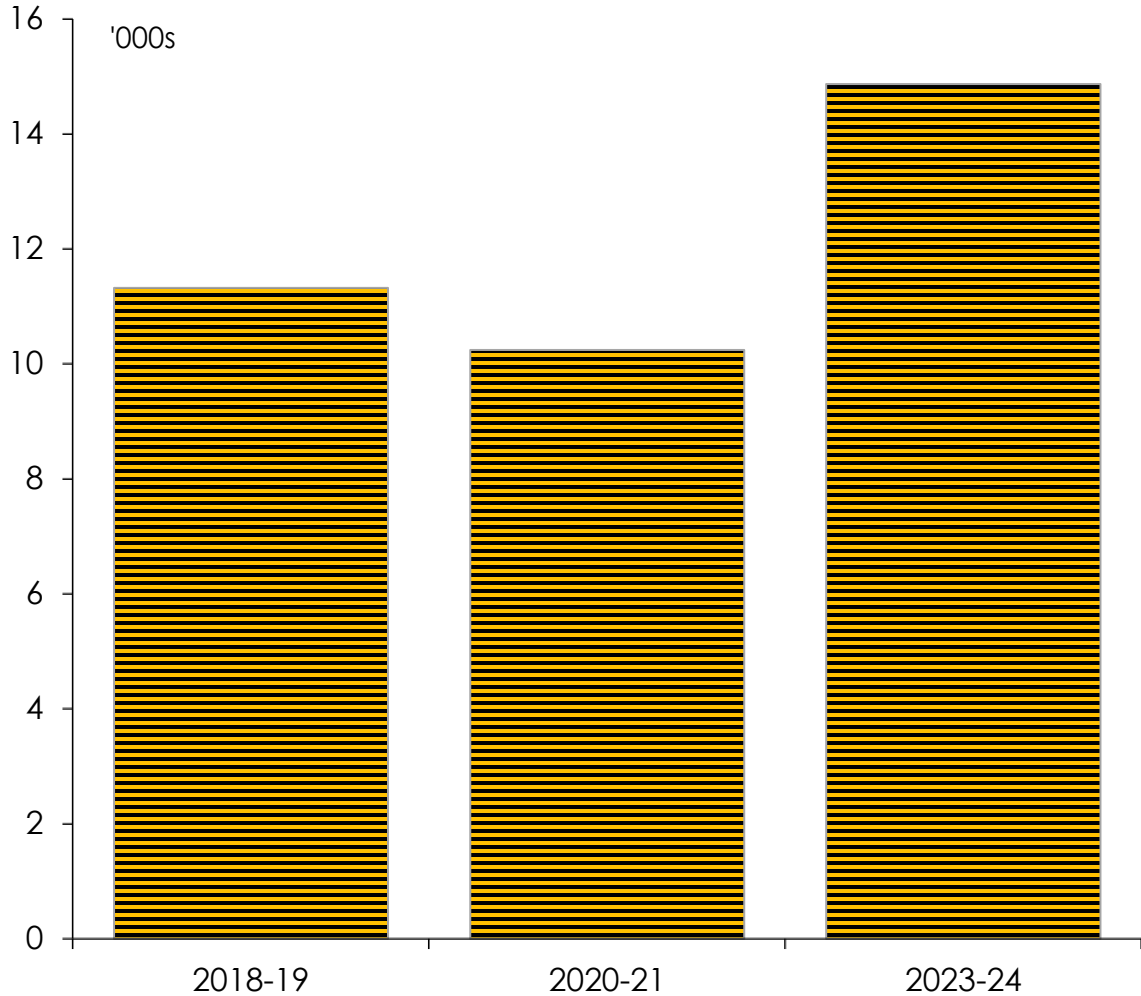
Source: Department of Natural Resources and Environment Tasmania, [Tasmanian Beekeeping Survey](#) and Australian Bureau of Agricultural and Resource Economics and Sciences (ABARES), [Agricultural commodities: Statistical tables](#), March quarter 2026.

The value of pollination services provided by Tasmanian beekeepers has risen by more than 55% so far this decade

Total value of bee industry outputs



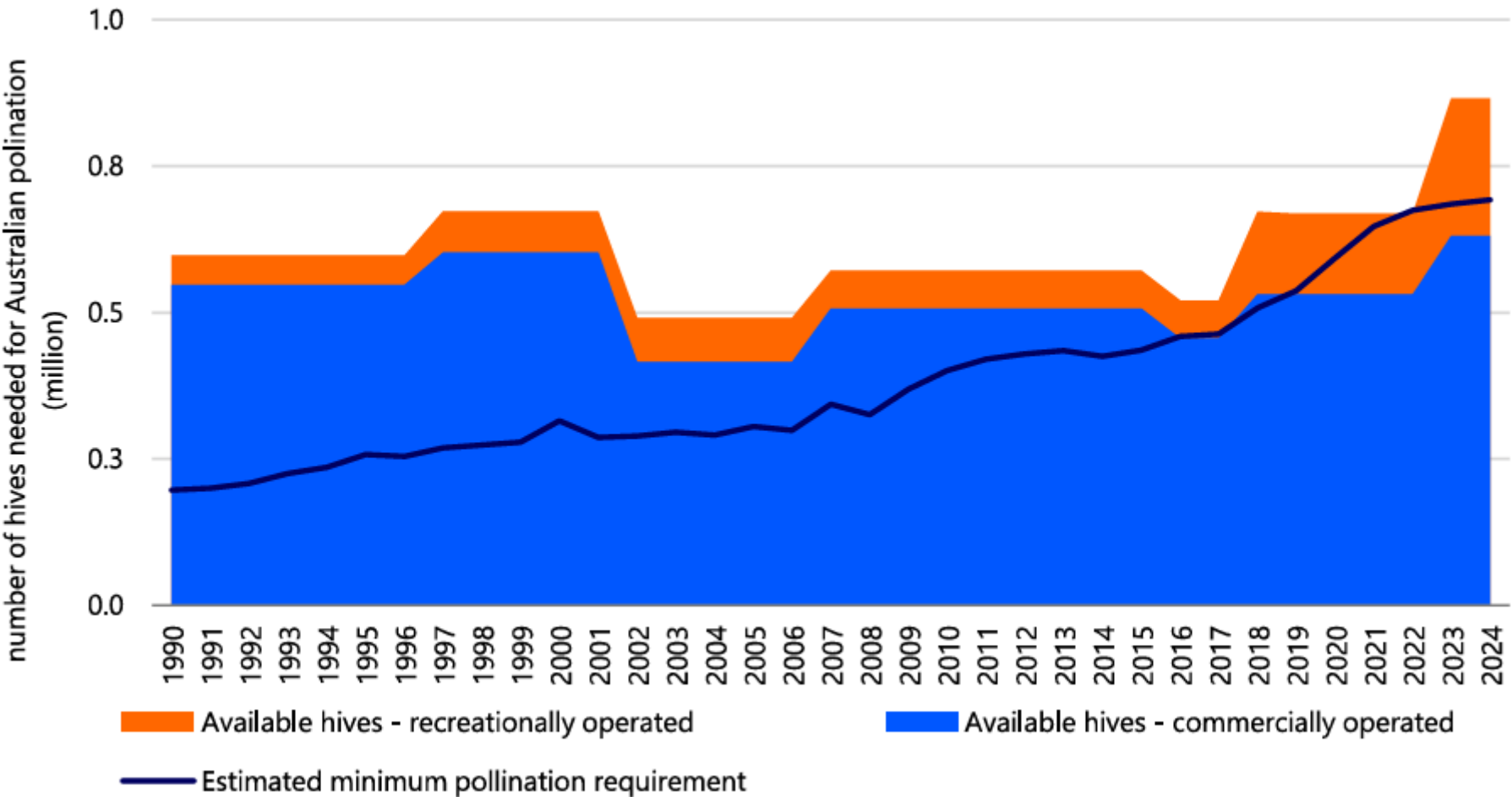
Hives used for pollination services



Source: Department of Natural Resources and Environment Tasmania, [Tasmanian Beekeeping Survey](#).

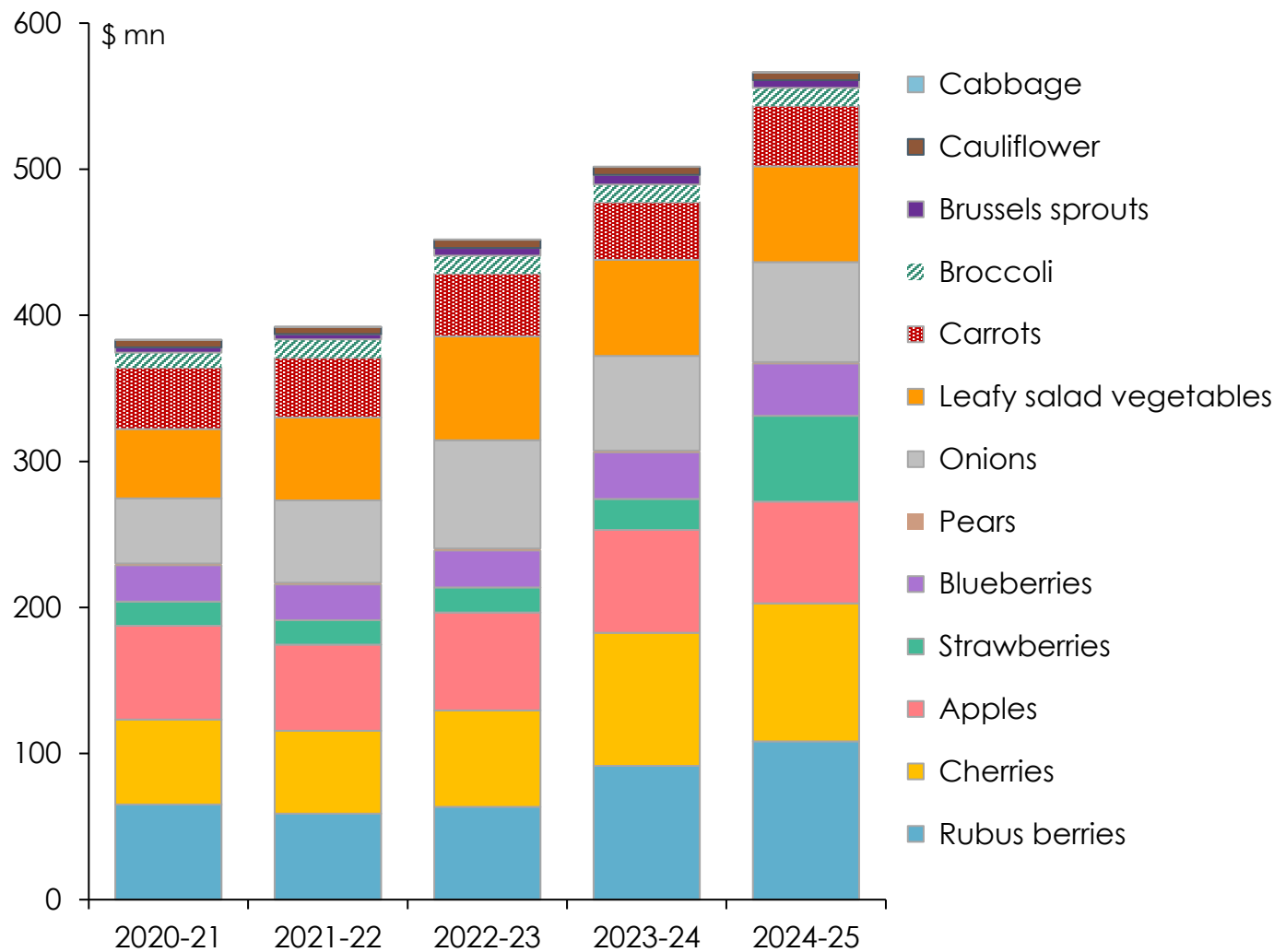
Across Australia demand for pollinators has tripled over the past three decades, vastly outstripping growth in the number of hives

Australian pollination demand and hive numbers

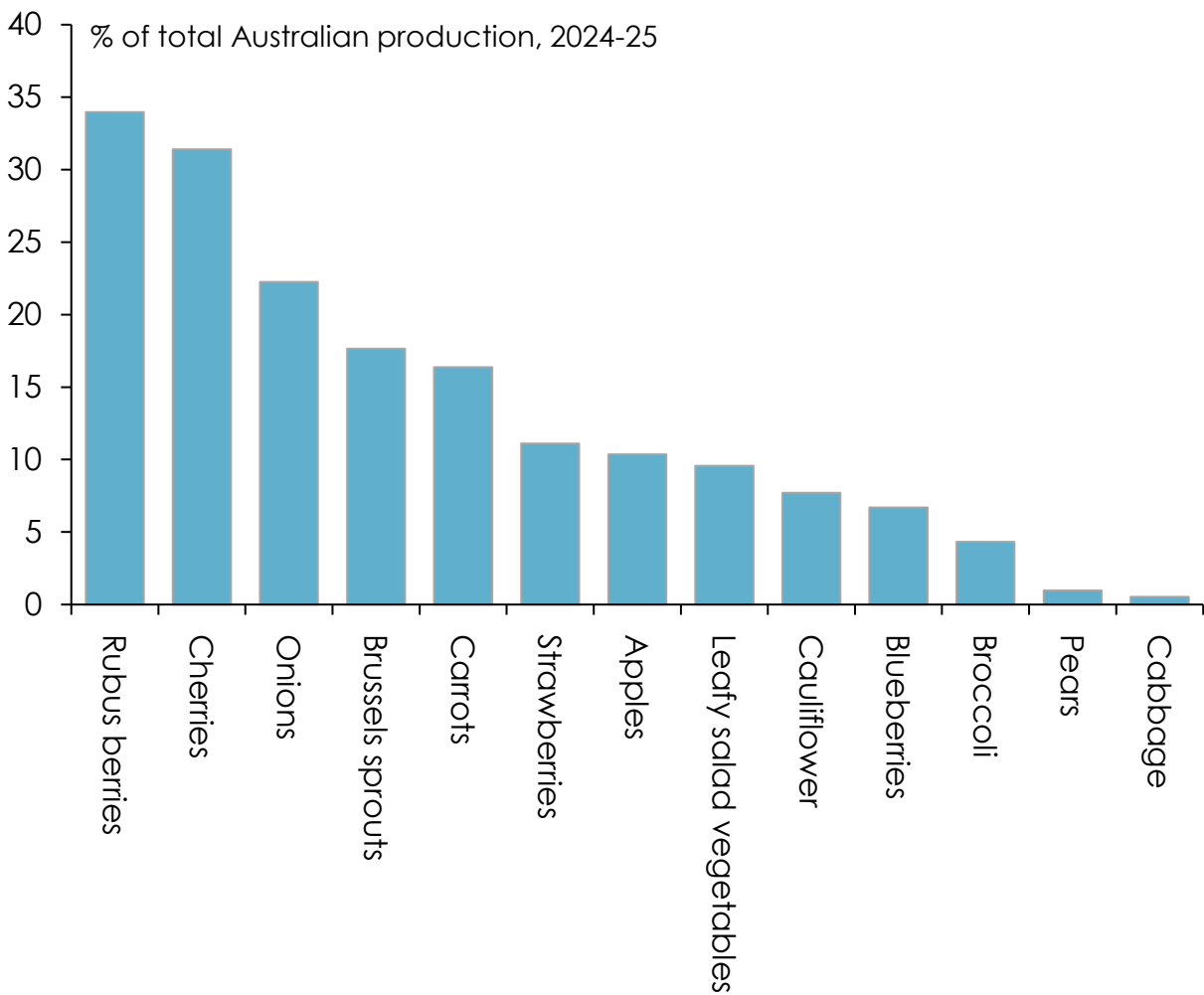


Tasmanian crops requiring pollination are worth almost \$570mn – and in many cases Tasmania accounts for a large share of national production

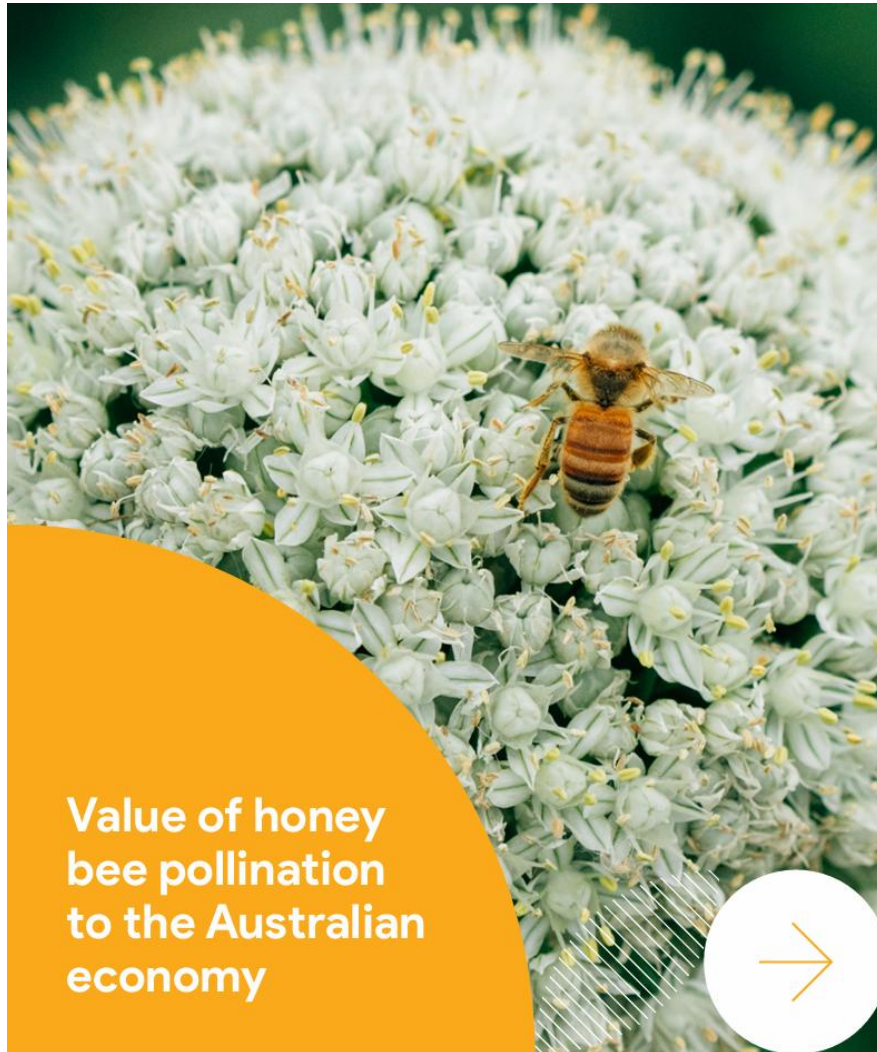
Value of Tasmanian fruit and vegetable crops using pollination services



Tasmanian share of total Australian production of fruit and vegetable crops using pollination services



Honey bee pollination is probably worth over \$200 million to the Tasmanian economy



Value of honey
bee pollination
to the Australian
economy

- ❑ The 2024 Gillespie Clarke & Frost report estimated that in 2020-21, 67 different crops worth \$12.9 billion across Australia were at least partially reliant on honey bee pollination
- ❑ From this, these authors concluded that the Australia-wide economic contribution attributable to honey bee pollination was \$4.6 billion
- ❑ Tasmania produced crops wholly or partly reliant on honey bee pollination worth almost \$570 million in 2024-25
 - note this estimate excludes some crops for which the ABS did not produce data on the value of production (such as broadacre seed, lucerne and clover, opium poppies, apricot and capsicum)
- ❑ Assuming the same ratio as in the Gillespie, Clarke & Frost report, the contribution of honey bee pollination to the Tasmanian economy in 2024-25 would be of the order of \$203 million

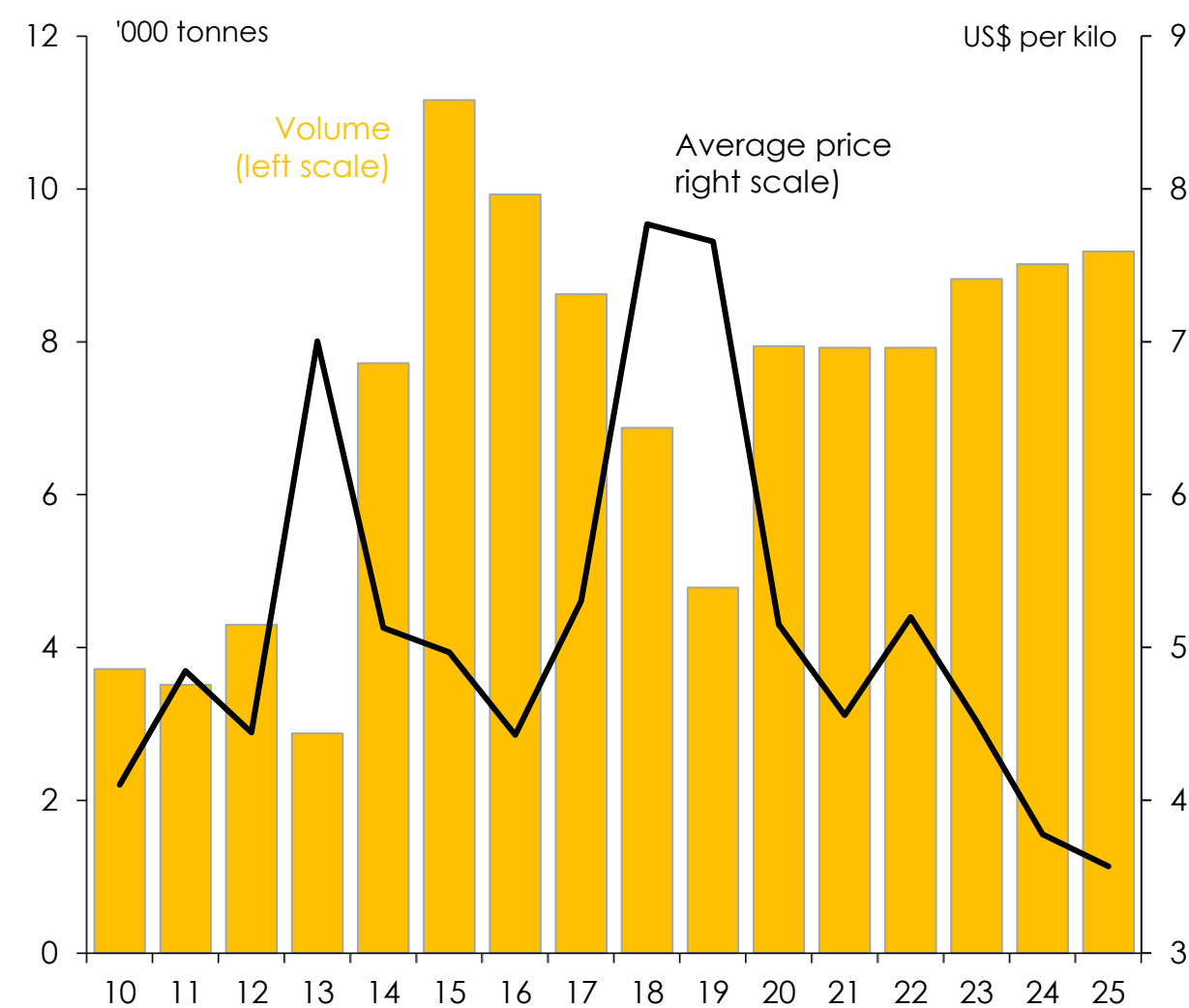
by Dr Rob Gillespie, Michael Clarke
and Elizabeth Frost
February 2024



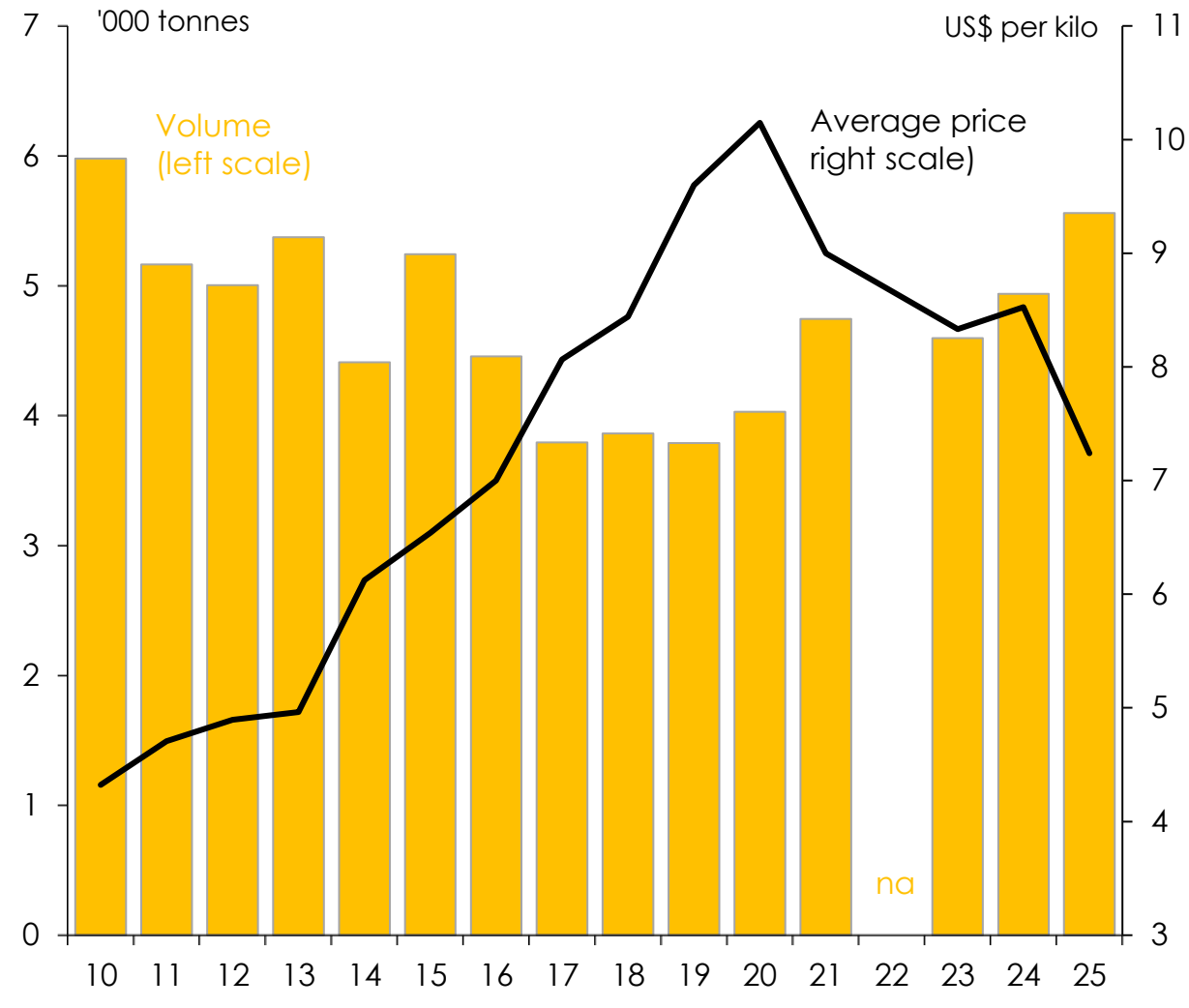
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Honey Bee
& Pollination

Australian honey producers face ongoing challenges both in export markets and in the domestic market from imports

Australian honey imports



Australian honey exports



Source: The World Bank, [World Integrated Trade Solutions](#).

And then there's varroa ...

Expected impacts of varroa on beekeeping and agriculture



Feral bees

16-90% of feral bee colonies are expected to die several years after an area is affected. Populations may eventually start to recover once resistance evolves.



Beekeepers

50-60% of beekeepers can be expected to leave the industry, mostly recreational beekeepers.



Pollination

Loss of feral bees will increase demand for paid pollination. Loss of commercial colonies will make pollination services more expensive.



Commercial colonies

Small reduction (2-5%) in the number of commercial colonies after several years with acaricide use. Long-term growth in commercial colonies to meet pollination demand.



Costs

30% increase in cash costs to run a beekeeping business. Additional management costs of \$35 per hive every year. Losses up to \$1.25 billion to pollinator-reliant industries over 30 years.

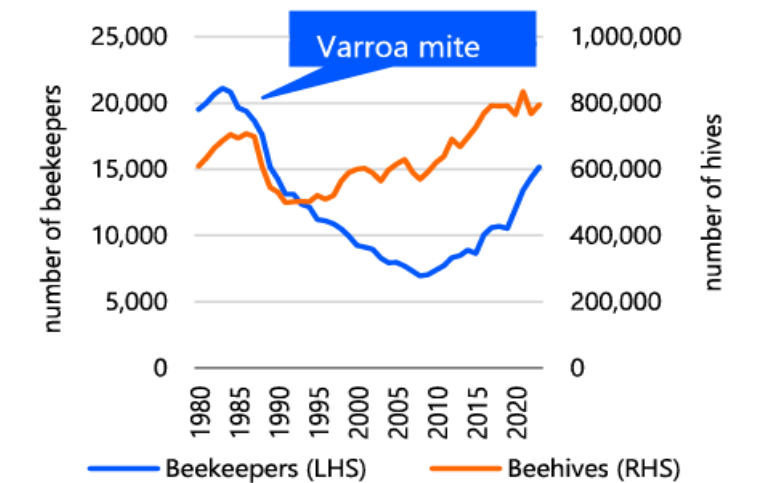


Honey Production

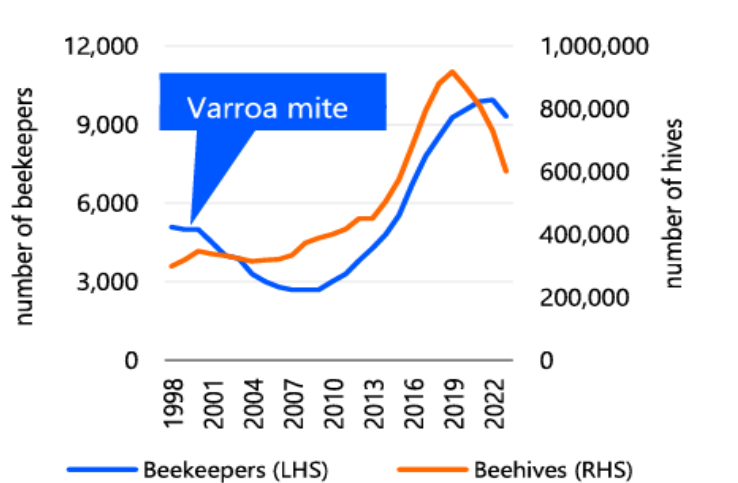
Reduced honey production due to treatment needs. Potentially some increase in honey production due to loss of feral bee populations.

Varroa outbreaks in other countries have led to substantial declines in the number of hives, especially among smaller operations

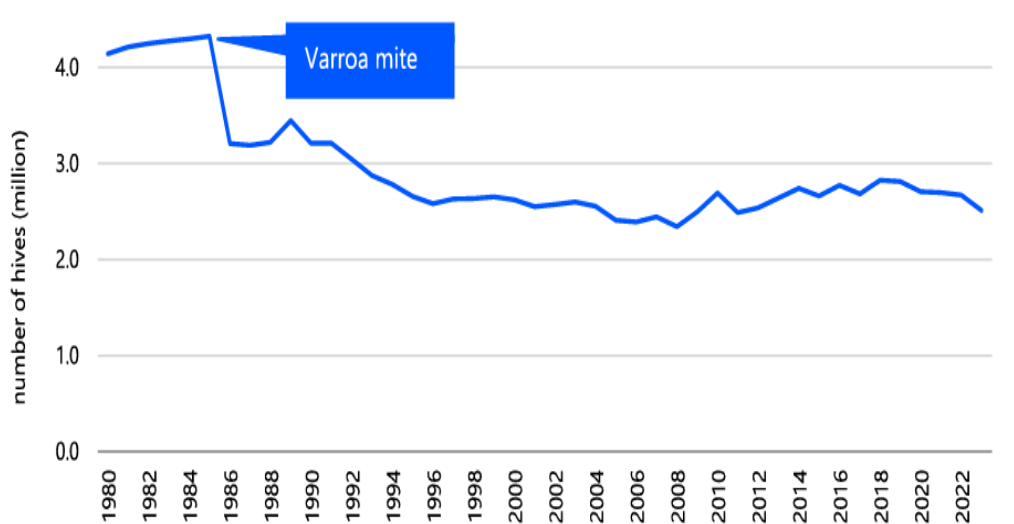
Canadian beekeepers and hives



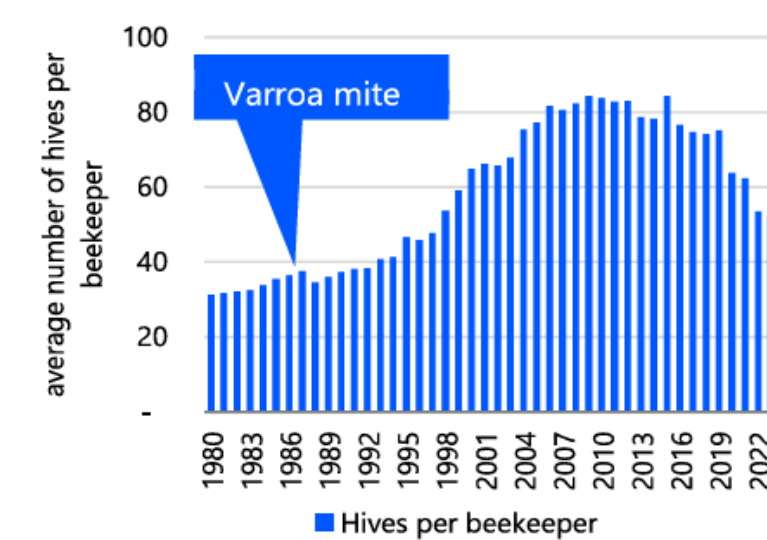
NZ beekeepers and hives



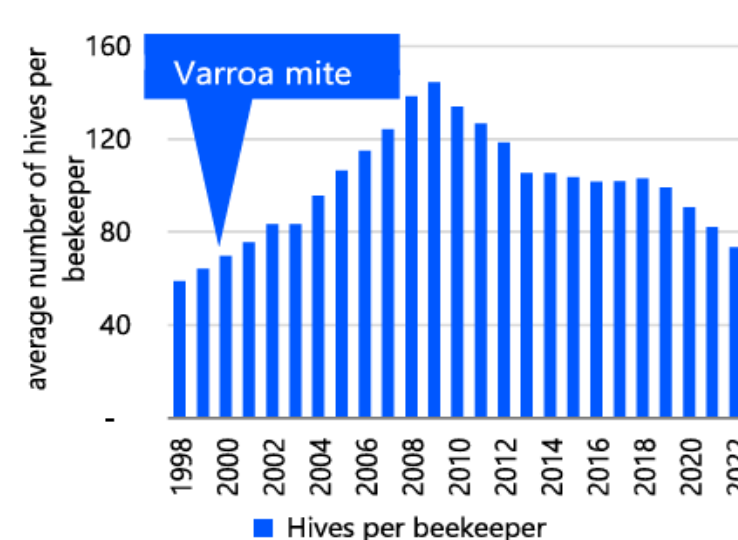
US number of hives



Canada hive numbers per keeper



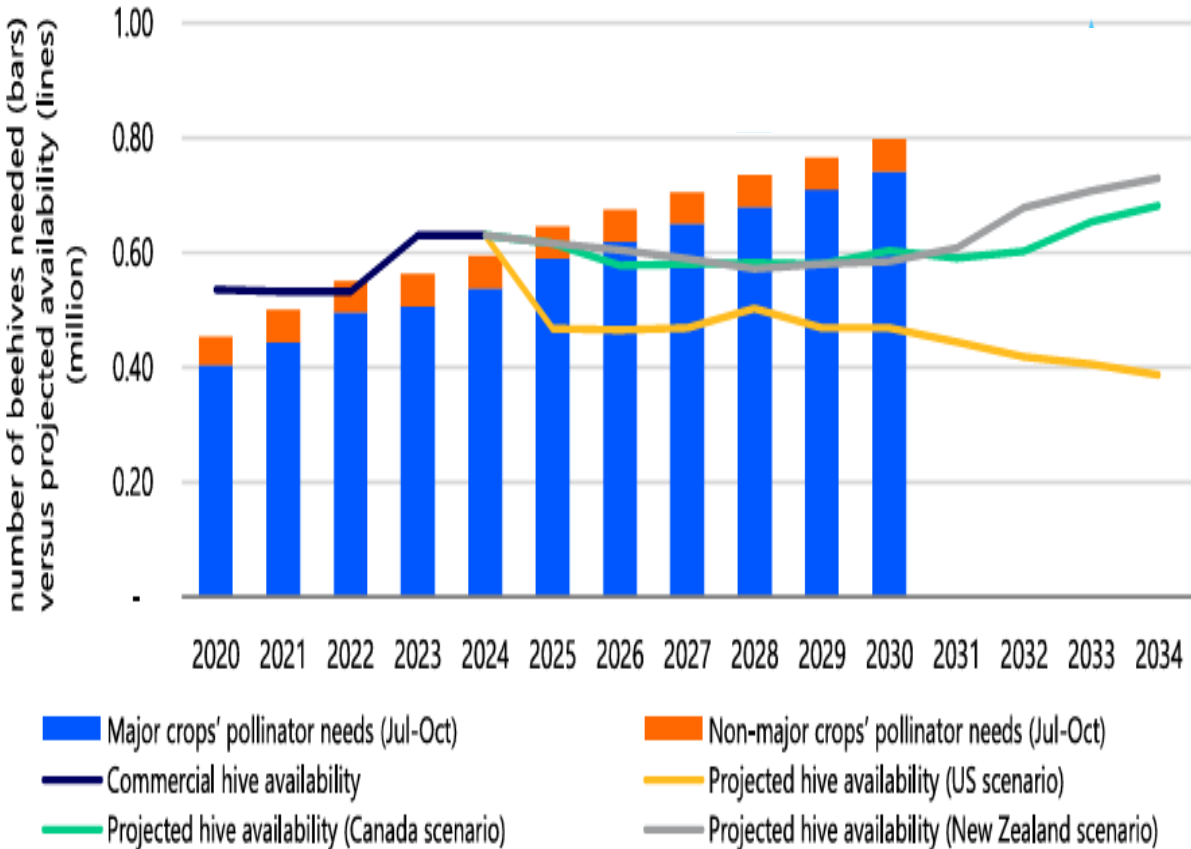
NZ hive numbers per keeper



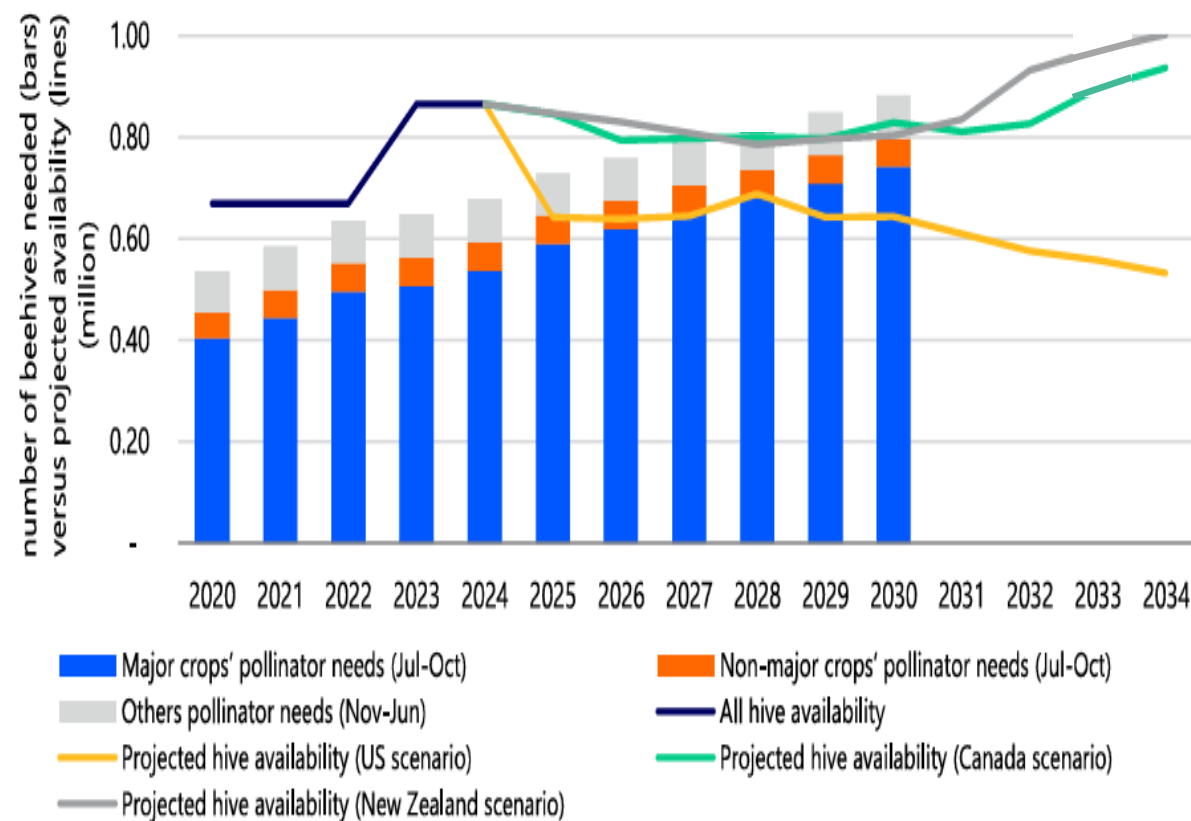
(Data on beekeeper numbers in the US not available)

Based on other countries' experience, the spread of varroa across Australia would have a severe impact on pollination-dependent crops

Commercial hive deficit in Australia during key pollination periods under different scenarios

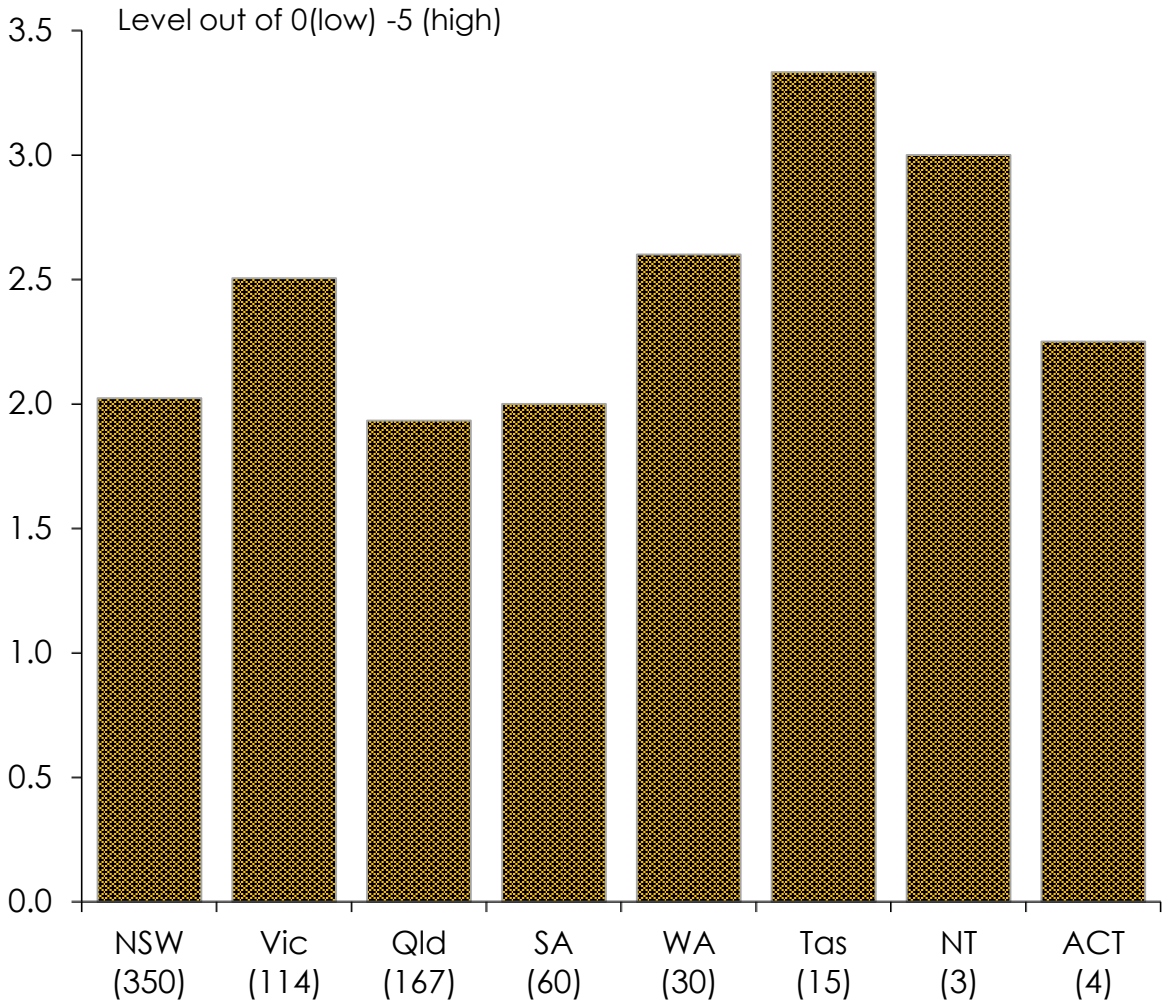


Commercial and recreational hive deficit in Australia during key pollination periods under different scenarios

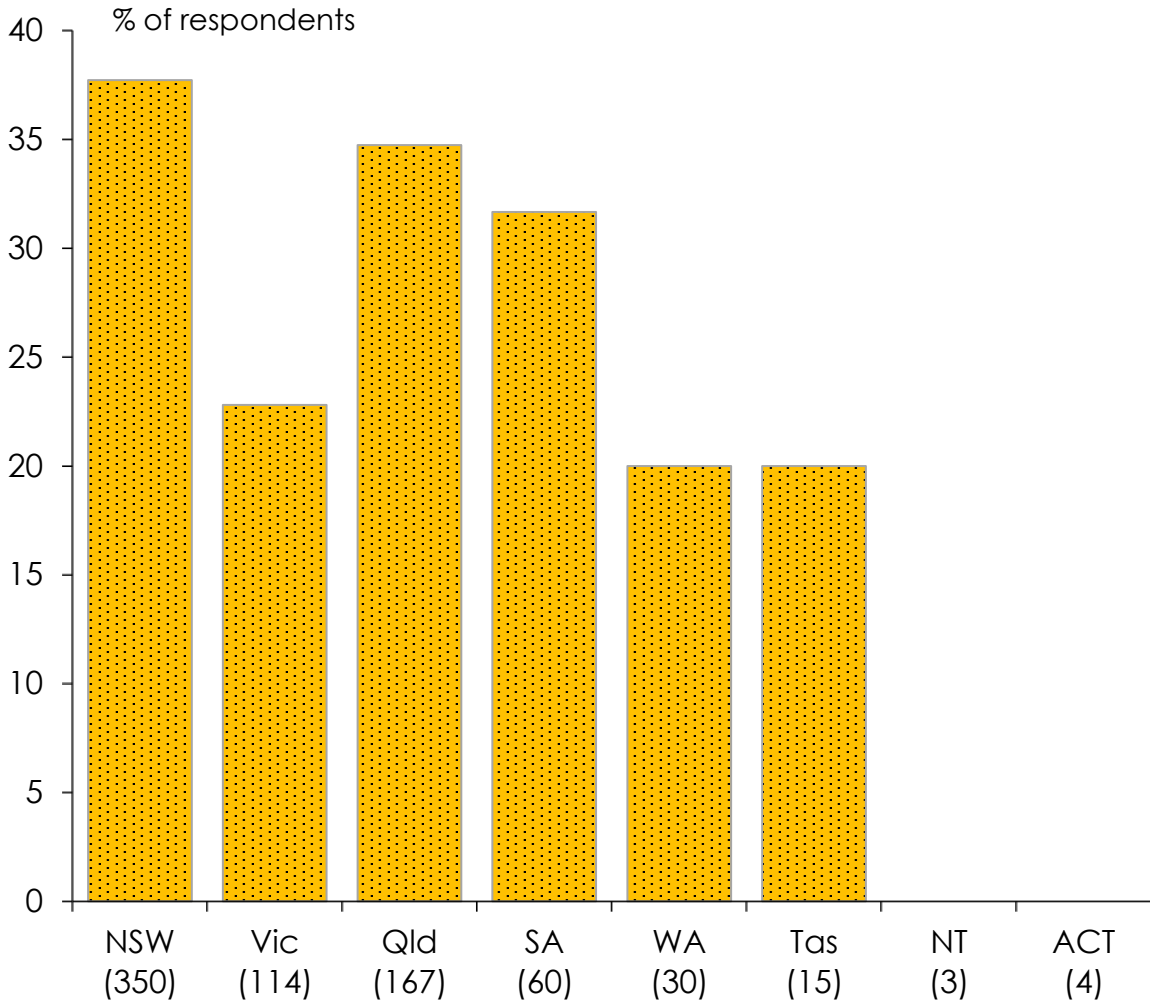


Tasmanian beekeepers are more confident, and less likely to leave the industry, than their mainland counterparts

Average level of confidence in profitability and sustainability of business



Percentage of beekeepers likely to exit the industry within five years



Source: Australian Honey Bee Industry Council (AHBIC), [Australian Beekeeping Industry Survey Snapshot](#), May 2026 (numbers in parentheses are the number of respondents to the survey in each state and territory).

Conclusions

- ❑ **Beekeeping is a small but important and growing part of Tasmania's agricultural sector**
 - Tasmania 'punches above its weight' in the production and export of honey
- ❑ **Tasmania also 'punches above its weight' in the production of horticultural (fruit and vegetable) crops which are partially or wholly reliant on pollination services – either 'free' (from nature) or commercial**
- ❑ **The arrival of varroa on the mainland represents a substantial, if not existential, threat to the viability of beekeeping and pollination services**
 - international experience with varroa suggests that it is highly likely to result in a very substantial decline in 'feral' bee populations, and a large and protracted decline in both recreational and commercial beekeeping
 - although there is also the potential of an expanded market for commercial pollination services for those industry participants who are able to survive
- ❑ **It's clearly in Tasmania's interests to keep varroa out of the state**
 - doing so will avoid potentially significant costs for beekeepers and potentially large hive losses
 - and enhance Tasmania's standing as a premium producer of 'niche' agricultural and horticultural products
- ❑ **Keeping varroa out of Tasmania would materially assist Tasmania to increase its presence in products which are wholly or partially dependent on pollination services, relative to mainland states affected by varroa**
 - and thus contribute to the achievement of the Government's objective of increasing the annual value of Tasmania agricultural production to \$10 billion by 2050
- ❑ **Investment in prevention, surveillance, preparedness and rapid response is thus a prudent economic safeguard for Tasmania's agriculture sector**
 - and it's likely to be a small cost relative to the potential losses if varroa were to establish in Tasmania

Questions and discussion

Important information

This document has been prepared by Saul Eslake on behalf of Corinna Economic Advisory Pty Ltd, ABN 165 668 058 69, whose registered office is located at Level 11, 114 William Street, Melbourne, Victoria 3000 Australia.

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