TASMANIAN BEEKEEPERS ASSOCIATION INC.

www.tasmanianbeekeepers.org.au
email: secretary@tasmanianbeekeepers.org.au

Submission: Draft Economic Diversification and Investment Strategy

1. Overall response

TBA supports the draft Strategy's recognition of agriculture, food, biosecurity, regional capability, premium branding and natural resources as areas of Tasmanian comparative advantage. We also welcome the emphasis on innovation, traceability, regional planning, infrastructure and measurable outcomes.

However, the draft does not recognise the apiary industry's biological and natural-resource infrastructure that makes agricultural growth possible. Pollination is absent, bee biosecurity is not developed as an investment-protection priority, and floral resources are not identified in regional or land-use planning. Beekeeping appears only indirectly through agriculture, food and emerging technologies.

This omission matters.

Tasmania cannot diversify or materially expand high-value horticulture, seed production and other pollination-dependent industries without sufficient healthy honey bee colonies and queen bees, a viable commercial beekeeping sector, and dependable access to floral resources.

Pollination should therefore be treated as enabling economic infrastructure, not simply as an output of the apiary industry.

2. About the TBA

The Tasmanian Beekeepers Association is the peak industry body representing Tasmania's commercial apiary sector. Our members produce premium honey and other bee products, provide essential managed pollination services and support businesses and employment across regional Tasmania.

TBA provides a coordinated industry voice on the issues affecting the viability and future of commercial beekeeping. These include bee health and biosecurity, access to floral resources and apiary sites, pollination capacity, skills and workforce development, transport, food production, regulation, research and market development.

The Association works with government, agricultural industries, researchers and other stakeholders to strengthen the resilience and capability of the sector. In doing so, TBA supports not only apiary businesses but the wider agricultural industries that depend upon healthy honey bee colonies and reliable pollination services.

Tasmanian beekeepers also contribute to the State's reputation for clean, high-quality food and agricultural production.

Protecting Tasmania's distinctive floral resources and strong biosecurity status is therefore central to both the future of the apiary industry and Tasmania's broader agricultural growth.

3. About the Tasmanian apiary industry

The Tasmanian Government's 2025 beekeeping industry survey[i] estimated that Tasmania's commercial sector manages approximately 22,405 hives and produces about 1,200 tonnes of honey annually. Direct apiary production, pollination and other services were valued at approximately $17.6 million. This direct value, however, substantially understates the industry's importance to Tasmania's wider economy.

Agriculture is one of Tasmania's most important economic sectors. The Tasmanian Agri-Food Scorecard[ii] recorded gross farm-gate agricultural production of $2.83 billion in 2023/2024, an increase of 15 per cent from the previous year.

More recent ABS State Accounts[iii] show that agriculture, forestry and fishing grew by 6.7 per cent in 2024/2025 and contributed 0.5 percentage points of Tasmania's total 1.0 per cent growth in Gross State Product. In other words, the sector generated approximately half of the State's economic growth during that year.

Within this agricultural economy, 14,869 hives were used to provide pollination services in 2023/24. Tasmanian fruit and vegetable crops wholly or partly reliant on honey bee pollination were worth almost $570 million in 2024/2025 - equivalent to approximately 20 per cent of the State's total gross farm-gate agricultural value. This estimate also excludes several relevant crops for which comparable production data were unavailable.

Applying the methodology used in a 2024 AgriFutures study, economist Saul Eslake estimated that the contribution attributable specifically to honey bee pollination was approximately $203 million.[iv] This is equivalent to just over 7 per cent of Tasmania's gross farm-gate agricultural value and is more than 11 times the apiary industry's directly recorded output.

These figures demonstrate the exceptional economic leverage of Tasmania's apiary industry. Investment in bee health and biosecurity does not protect only a $17.6 million beekeeping sector: it protects an estimated $203 million annual contribution to agricultural production and supports crops worth almost $570 million. This wider value should be central to government decisions about investment in varroa prevention, surveillance, preparedness and rapid response.

4. Summary of recommendations

- Recognise commercial pollination as enabling infrastructure for agricultural diversification and growth.
- Treat Tasmania's varroa-free status and bee biosecurity capability as strategic economic assets requiring sustained investment.
- Incorporate floral resources and apiary access into regional, forestry, fire, conservation and land-use planning.
- Strengthen commercial beekeeping workforce capability, skills, safety and succession planning.

- Support innovation in bee health, hive monitoring, traceability, provenance and pollination planning.
- Ensure transport, infrastructure and regulatory reforms reflect the practical operation of mobile pollination businesses.
- Include pollination capacity, biosecurity preparedness and floral-resource security in the Strategy's indicators and action plans.

5. Detailed comments

5.1 Recognise pollination as economic infrastructure

Tasmania's agriculture, food and beverage sectors are central to the draft Strategy, yet their dependence on managed pollination is not acknowledged.

Honey bees support the production, yield and quality of many fruit, vegetable, seed and nut crops.

Pollination demand is also highly seasonal and location-specific, requiring commercial operators to maintain healthy colonies, specialist equipment, skilled labour and the capacity to move hives safely and efficiently.

Both demand and the commercial response are growing. Between 2018/2019 and 2023/2024, the number of hives used for pollination rose from 11,323 to 14,869, while the reported value of pollination services increased from $1.8 million to $2.8 million - more than 55 per cent.[v] Nationally, estimated pollination demand has tripled over the past three decades and has grown much faster than hive numbers.

The Government's target of growing the farm-gate value of agriculture to $10 billion by 2050 will significantly increase demand for pollination. Unless pollination capacity is planned alongside new crops, land, water, skills and freight, it may become a constraint on investment rather than an assumed input available on demand.

Recognising pollination also improves investment decisions. The economic value created by a hive used in crop production is not captured in the beekeeper's service fee alone; much of it appears in the value of the crop. Conventional sector measures therefore understate both the contribution of beekeeping and the consequences of inadequate capacity.

The opportunity is especially significant for Tasmania.

In 2024/2025, the State produced almost $570 million of fruit and vegetable crops using pollination services and accounted for around 34 per cent of Australian Rubus berry production, 31 per cent of cherries and 22 per cent of onions.

Reliable pollination capacity therefore supports not only individual farm businesses but industries in which Tasmania already holds a nationally significant position.

Recommendation: Identify managed pollination as enabling agricultural infrastructure under Priorities 2, 4 and 6. Future action plans should map current and projected pollination demand and capacity, identify regional constraints and integrate pollination into agricultural investment and land-use planning.

5.2 Protect Tasmania's bee biosecurity advantage

The draft correctly identifies geographic remoteness and biosecurity as advantages of growing strategic importance. Tasmania's freedom from varroa mite is a practical example. It supports colony health and productivity, reduces production costs, protects pollination capacity and strengthens the clean and natural reputation of Tasmanian honey and agricultural products.

That advantage cannot be taken for granted. Varroa is established in mainland Australia, and movements of people, vehicles, freight, vessels, bees, bee products and apiary equipment create ongoing pathways. A biosecurity failure would impose costs across the apiary sector and pollination-dependent agriculture, including treatment, surveillance, colony losses, lower productivity and increased management requirements.

National research and modelling illustrate the potential scale of the threat. The 2024/2025 Australian Colony Loss Survey[vi] found that beekeepers in New South Wales were already spending an average of $21 and an additional 23.5 minutes per hive on varroa management and treatment. ABARES modelling in 2012[vii] estimated that the unhindered spread of varroa could cause losses of between $0.63 billion and $1.31 billion to producers and consumers of pollination-dependent crops over 30 years. Obviously, these costs will have increased considerable since then.

Although these are national findings rather than Tasmania-specific forecasts, they demonstrate why prevention is a prudent economic investment rather than merely a biosecurity expense. Biosecurity expenditure should consequently be understood as protecting existing private investment and future agricultural growth, not merely as a regulatory service or emergency cost.

Maintaining varroa freedom is also an economic opportunity. As mainland producers face higher management costs and reduced feral pollination, Tasmania can strengthen its relative position in premium, pollination-dependent products and materially assist progress towards the Government's target of $10 billion in annual agricultural production by 2050.

Recommendation: Make maintenance of Tasmania's varroa-free status a strategic economic priority. Actions should include a contemporary Import Risk Analysis, sustained specialist bee biosecurity capability, risk-based border and pathway surveillance, effective traceability and diagnostics, clear response planning, and genuine industry-government partnership through the Varroa Taskforce.

5.3 Secure floral resources and apiary access

Tasmania's premium honey industry depends on access to natural flowering resources, particularly leatherwood and other native species. The 2025 beekeeping industry survey[viii] indicates that more than 70 per cent of honey production relies on public-land resources. These resources also allow colonies to build strength before and recover after pollination services.

Forestry operations, planned burns, wildfire, conservation decisions, road closures, competing land uses and changes to access arrangements can cumulatively affect hive nutrition, honey yields and business viability. Yet floral resources are rarely treated as productive assets in economic, forestry, or regional planning.

This does not require every floral resource to be reserved from other uses. It requires the economic value of apiary access to be visible, affected businesses to be consulted early, and cumulative impacts and practical alternatives to be considered before decisions are made.

Recommendation: Include floral-resource mapping, apiary access and the cumulative effect of land-management decisions in regional prospectuses and planning mechanisms. Establish structured consultation with TBA on forestry, fire, conservation, road-access and other public-land decisions affecting commercial apiaries.

5.4 Build workforce capability and business resilience

Commercial beekeeping is skilled, physically demanding and safety-critical work. It combines animal husbandry, pest and disease recognition, heavy vehicle and machinery operation, food production, remote-area work, business management and rapidly changing biosecurity obligations. Pollination movements also require operators to work long and irregular hours within narrow crop and weather windows.

The industry faces an ageing workforce, limited formal pathways, high barriers to entry and significant succession challenges. Generic small-business or agricultural programs do not always fit apiary businesses, which are typically mobile, seasonal, and reliant on public as well as private land.

Recommendation: Recognise commercial beekeeping within workforce and skills planning. Develop industry-supported pathways covering bee health and biosecurity, pollination management, transport and work health and safety, digital capability, business resilience and succession, with delivery accessible to regional operators.

5.5 Support innovation, data and premium market development

TBA welcomes the draft's identification of precision agriculture, agtech, traceability, provenance and biosecurity technologies as emerging domains. These have direct applications to beekeeping through remote hive monitoring, disease detection, pollination scheduling, movement records, crop–beekeeper coordination and authentication of honey origin.

Tasmania's premium brand also offers opportunities to increase value rather than volume alone. Distinctive botanical origins, additive-free production, clean biosecurity status and credible provenance can support market differentiation. Commercialisation assistance should be available to established small businesses and industry collaborations, not only technology start-ups.

Better data is essential. Current information on hive numbers, pollination demand, floral resources and production is incomplete and often assembled through ad hoc industry effort. Poor visibility increases the risk that agricultural and infrastructure decisions assume capacity that does not exist.

Recommendation: Support industry-research commercialisation projects in bee health, monitoring, traceability and provenance; improve public and industry data on pollination and floral resources; and ensure trade and premium-branding initiatives include Tasmanian honey and pollination-enabled produce.

5.6 Align transport, infrastructure and regulation with industry operations

Reliable roads, ports, communications and fuel and freight services are important to apiary businesses, particularly in regional and remote locations. Digital connectivity is increasingly needed for compliance, traceability, safety and remote monitoring, but should be accompanied by systems that remain workable in areas of poor coverage.

TBA supports simpler and more consistent regulation where this can be achieved without weakening biosecurity, food safety, environmental protection or worker safety. Regulatory reviews must nevertheless understand the practical realities of mobile pollination. Rules framed around fixed farms, conventional freight or a single point of production can inadvertently exclude legitimate apiary activity or add costs without improving outcomes.

Recommendation: Consult the apiary industry when transport, heavy-vehicle, public-land, planning, food, traceability and biosecurity settings are reviewed. Regulatory impact assessments should test mobile, multi-site and seasonal pollination scenarios and avoid shifting administrative burdens onto small businesses without demonstrated benefit.

5.7 Translate recognition into measurable action

The draft proposes rolling action plans and public implementation updates. TBA supports this approach, provided actions have clear ownership, resources, targets and timeframes. Broad references to agriculture or biosecurity will not be sufficient to ensure that pollination capacity and bee health are considered in investment decisions.

Relevant indicators could include commercial pollination capacity relative to projected demand; varroa surveillance and response readiness; access to productive floral resources; adoption of traceability and monitoring tools; workforce entry and succession; and the value of pollination-dependent production.

Recommendation: Include pollination capacity, bee biosecurity preparedness and floral-resource security in the Strategy's indicators and action plans. TBA should be included in implementation and review mechanisms wherever agriculture, biosecurity, regional planning, innovation or infrastructure affects the apiary sector.

6. Conclusion

Tasmania's apiary industry should not be assessed solely by its $17.6 million in directly recorded output. Its far greater economic significance lies in the agricultural production it enables. Managed honey bee pollination supports Tasmanian crops worth almost $570 million annually, with an estimated $203 million directly attributable to pollination - more than eleven times the apiary industry's recorded output.

Pollination is therefore essential economic infrastructure for Tasmania's agricultural growth, regional employment and premium food production.

Tasmania's freedom from varroa mite is also a scarce and increasingly valuable competitive advantage.

With varroa now established on mainland Australia, sustained investment in prevention, surveillance and preparedness is not simply assistance to the beekeeping industry or a routine biosecurity expense.

It is prudent protection of the State's productive capacity, agricultural investment and reputation for clean, high-quality produce. The cost and disruption of an incursion would be borne well beyond the apiary sector, particularly by Tasmania's horticultural industries and regional communities.

The final Strategy should therefore explicitly recognise managed pollination, bee biosecurity and secure access to floral resources as foundations of agricultural diversification. This recognition must be translated into funded actions, measurable indicators and clear responsibility for implementation. Without it, Tasmania risks pursuing ambitious agricultural growth targets while overlooking one of the critical inputs upon which that growth depends. With it, the State can protect its existing agricultural value, strengthen its competitive advantage and build the pollination capacity required to support the Government's goal of a $10 billion agricultural industry by 2050.

TBA stands ready to work in partnership with the Tasmanian Government to ensure these priorities are incorporated into the final Strategy and its implementation.

---

[i] 2025 Tasmanian Beekeeping Survey Report, Department of Natural Resources and Environment Tasmania

[ii] Tasmanian Agri-Food Scorecard 2023/2024, Department of Natural Resources and Environment Tasmania

[iii] Australian Bureau of Statistics, *Australian National Accounts: State Accounts, 2024/25*; Australian Bureau of Statistics, *Australian Agriculture: Horticulture, 2024/25*

[iv] The Economic Importance of Tasmania's Apiary Industry, Saul Eslake - presentation to the TBA Annual Conference, 10 July 2026. This research draws on data from NRE Tasmania, ABS, AgriFutures, and RaboResearch.

[v] 2025 Tasmanian Beekeeping Survey Report, Department of Natural Resources and Environment Tasmania

[vi] Australian Honey-Bee Pollination Industry National Colony Loss Survey 2024/2025, Agrifutures Australia

[vii] A benefit-cost framework for responding to an incursion of Varroa, Australian Bureau of Agricultural and Resource Economics and Sciences, 2012

[viii] 2025 Tasmanian Beekeeping Survey Report, Department of Natural Resources and Environment Tasmania