

2025 Tasmanian Beekeeping Survey Report



SURVEY FAST FACTS | 2023 - 24



- ▶ **1,867 registered beekeepers.**
- ▶ **42,613 registered hives.**
- ▶ **77% of registered hives were owned by commercial beekeepers.**
- ▶ **Total number of registered hives forecast to increase by 8% over 2025-26.**



- ▶ **1,200 tonnes of honey produced.**
- ▶ **At least 70% of honey produced was sourced from public land.**
- ▶ **The farm gate value of honey was \$14.1 million**



- ▶ **October and January are the busiest months for pollination services.**
- ▶ **14,869 hives supplied pollination services, up 45% from 2020-21**
- ▶ **\$2.8 million earned from pollination services provided, up 40% from 2020-21: underpins pollination-dependent crops with an estimated value up to \$400 million.**



- ▶ **48% of respondents spent \$25 to \$50 per hive on maintenance.**
- ▶ **A farm gate value of \$719,553 for other bee products including wax, nucleus hives, honeycomb, queens and packaged bees.**
- ▶ **Total value of industry was \$17.6 million, up 15% from 2020-21.**

Introduction

In 2019 and 2021, the Department of Natural Resources and Environment Tasmania (NRE Tas) surveyed Tasmanian beekeepers to improve understanding of the size, value and future needs of the Tasmanian beekeeping industry. The results of the previous surveys are available at: <https://nre.tas.gov.au/agriculture/beekeeping-and-honey/tasmanian-beekeeping-survey>.

In March 2025, NRE Tas conducted a survey focusing on **commercial beekeepers** - apiarists with 50 or more hives as defined by The Department of Agriculture, Fisheries and Forestry (DAFF) and the Australian Honey Bee Industry Code of Practice. This Report summarises the findings of the survey. This Report provides an update on the size and value of the Tasmanian beekeeping industry and reports on changes since the last survey in 2020-21.

Sampling

The 2025 survey sample differs from previous survey years (which sampled both recreational and commercial beekeepers) but, where appropriate, comparisons have been made with other survey years. Accordingly, some new questions have been incorporated into this updated survey (including follow up consultations) and some questions previously used in the 2021 survey were adjusted.

At the time of data collection, there were 59 registered commercial beekeepers who were requested to respond to the survey.

Of the total who received a survey invitation, 24 (41%) responded. Thirteen out of the 24 had more than 400 hives and represented major pollination service providers through to specialised honey producers.

AgriGrowth Tasmania, on behalf of NRE Tas, would like to thank all the participants of the survey for their valuable contribution. We appreciate the time it took to provide information and participate in follow up consultations.

AgriGrowth Tasmania would also like to acknowledge the guidance and support of the Tasmanian Beekeepers Association (TBA) and our colleagues in the Biosecurity Tasmania apiary team throughout the process.

All photographs in this report were taken by Wildbonde Photography, courtesy of Tasmanian Beekeepers Association.

Hives

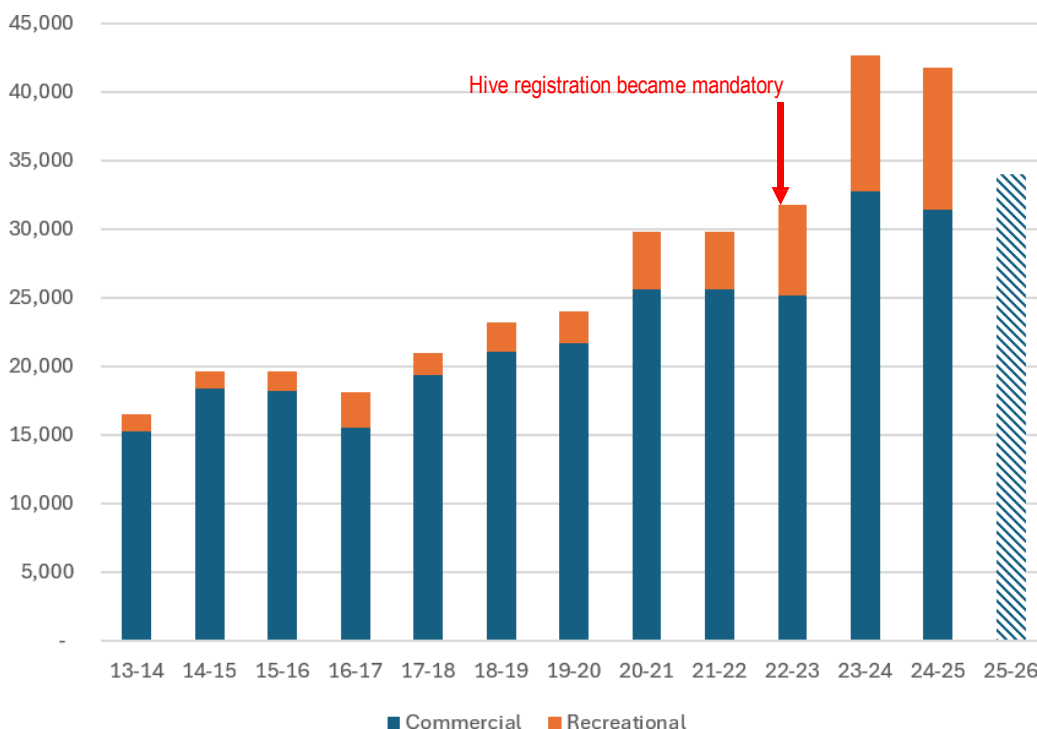
There are 42,613 registered hives in Tasmania according to Biosecurity Tasmania's online registration system [BeeTas](#). In 2023-24, commercial beekeepers owned 32,701 of Tasmania's registered hives, accounting for 77% of all registered hives (BeeTas). Survey respondents owned 22,885 hives, approximately 54% of all registered hives, and collectively employed 85 FTE.

Amongst survey respondents, 22% (5 businesses) spent less than \$25 per hive per year on hive upkeep, 48% (11 businesses) spent between \$25-\$50 and 26% (7 businesses) spent more than \$50 per hive per year on hive upkeep.

Regarding future intentions, 45% of respondents (11 businesses) planned to maintain their current number of hives over the next 12 months, while 21% (5 businesses) planned to reduce and 33% (8 businesses) planned to increase their hive numbers, with an indicated net increase among respondents' of 1800 hives (an increase of approximately 8% in the number of hives).

Reasons given for increasing hive numbers included to increase income, meet increased demand for pollination, building a buffer bee population should an incursion of varroa mite occur and generating employment. Main reasons given for decreasing hive numbers were shortage of skilled staff and lack of demand for honey.

Number of registered hives over time (financial year)



Note: 2025-26 shows projection for commercial hive numbers only (Source: BeeTas 2024-25).

Honey

Respondents reported that in 2023-24 they produced a total of 708 tonnes of honey from 22,405 hives, for an overall yield of 31.6 kg per hive. Extrapolating to the whole industry, it can be estimated that 1,200 tonnes of honey was produced for 2023-24¹.

Amongst survey respondents, more than seventy percent of the honey was reported as being produced from flora in public land. Leatherwood was the main type of honey produced and 91.3% of honey produced was processed and packaged in-house.

Apiarists whose sole focus is on honey production start placing hives as early as September and start bringing hives back to their “overwintering²” location towards the end of May. Beekeepers who also provide pollination services generally allocate hives to service crops first and then move to honey crops, before overwintering.

Aggregated hive allocation/movement timeline for honey crops

Crops	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Bush												
Gum*												
Kunzea												
Prickly box												
Manuka												
Leatherwood												

Filled in blocks indicate hive presence. Each colour band represents a different crop. *Gum flowers once every 5-7 years.

Red line indicates when honey flow stops. Hives beyond this point are either left to collect honey on site for logistical reasons or other business decisions.

Data source: Follow-up consultations with survey respondents.

Survey respondents reported a total farm gate value of \$8.4 million from 708 tonnes for an average price of \$11.87 per kg of honey. Extrapolating to the whole industry, the farm gate value was estimated to be \$14.1 million for 2023-24.



¹Honey tonnes estimation took into allowance differences in yield between commercial and recreational beekeepers reported in the previous survey (2020-21). Tonnage has been rounded to the nearest 100.

²Overwintering is the process of helping a bee colony survive through winter. Bees cluster to generate heat and reduce activity during cold months. Beekeepers ensure the hive has enough food, proper insulation, and ventilation while protecting it from moisture, drafts, and pests.

Pollination services

Sixty-six percent (66%) of the survey respondents (16 businesses) reported providing pollination services in 2023-24 and collectively owned 76% of hives reported in this survey. Survey respondents reported a total of 14,869 hives were used for pollination. This is 45% higher than the number reported in 2020-21, which may partially reflect greater coverage of commercial pollination providers in the survey process.

The average value of pollination services was \$188 per hive and across the industry this equates to \$2.8 million in pollination services, up 40% from 2020-21 with these services playing a critical role in underpinning pollination-dependent crops which have an estimated value of up to \$400 million.

Respondents identified a range of crops for which they provided pollination services. The first crop to be serviced is either plums or apricots, kicking off the season in August (see table below).

Fennel, chicory and berry crops are among the latest crops to be pollinated, with berry pollinators (not being moved onto other crops) often overwintering at the pollination sites.

Based on responses received, the peak period for pollination services is October to February, October and January being the busiest months.

Aggregated hive allocation/movement for pollination serviced crops

Crops	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Plums		█	█	█	█							
Apricots		█	█	█	█							
Apples			█	█	█	█	█					
Cherries			█	█	█	█	█	█				
Brassica s.				█	█	█	█	█				
Blueberries				█	█	█	█	█				
Canola s.				█	█	█	█	█	█			
Raspberries				█	█	█	█	█	█	█	█	█
Strawberries				█	█	█	█	█	█	█	█	█
Blackberries					█	█	█	█	█	█	█	█
Clover s.					█	█	█	█	█			
Carrot s.						█	█	█	█			
Onion s.						█	█	█				
Chicory s.							█	█	█	█		
Fennel s.								█	█	█		

"s." denotes seed crops. Filled in blocks indicate hive presence. Each colour band represents a different crop.

Data source: Follow-up consultations with survey respondents.



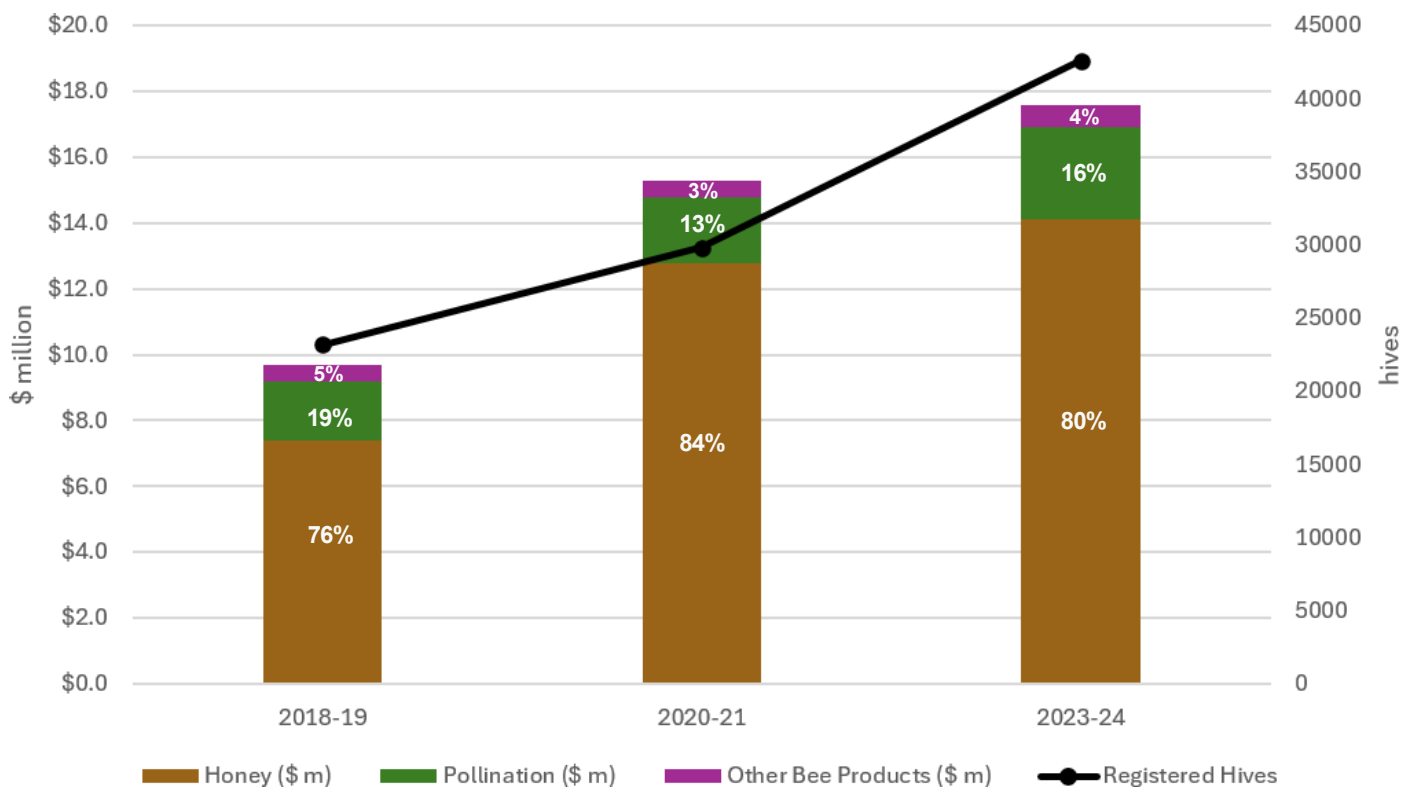
Other bee products

Respondents reported a total 11,255 kg of beeswax was produced in 2023-24 with an estimated worth of \$278,024. A value of \$276,032 was reported for other bee products including nucleus hives, honeycomb, queens and package bees. The highest value products were honeycomb (\$115,000), foodstuffs such as mead (\$90,000), cosmetics (\$50,000) and nucleus hives (\$13,500).

The total value of other bee products and beeswax reported for 2023-24 was \$554,056. Extending this across the industry, the value of other bee products can be estimated at \$719,553³. This represents an increase of 33% in the value of other bee products compared to the value reported in 2020-21.

Survey responses indicated that prior to the ban on the importation of bees into Tasmania, 58% of commercial apiarists (14 businesses) imported queen bees at an average cost of \$14,564 per year per commercial beekeeper. Following the importation ban, 96% of respondents reported that they breed their own queens and 13% purchase queens from local breeders, noting that some respondents indicated that they both purchase queens and breed their own⁴.

Total value of Industry 2018-19 to 2023-24 by total registered



³Based on extrapolating the reported value to all registered hives in 2023-24.

⁴A limitation of the survey data is that it does not relay whether sufficient queens are available in Tasmania.

Other themes

The themes of access to the leatherwood resource, biosecurity and skill shortages were identified in the feedback, consistent with the findings of the 2020-21 survey.

- The availability of access to the leatherwood resource continues to be a challenge for the industry. The West Coast fire in February 2025 caused minimal damage to hives but impacted some leatherwood resources. Climate variability also is impacting inflorescence and nectar abundance, which is having a flow-on impact on leatherwood honey yield.

Under the 2018-19 Bee Industry Futures budget initiative, the Tasmanian Government provided \$349,000 for 20 projects to maintain vehicle tracks leading to hive sites in remote rainforest areas for registered beekeepers to access leatherwood resources, which have now been completed. This work typically involved fixing potholes, clearing encroaching vegetation, unblocking culverts and grading roads.

- Biosecurity is a constant priority for the industry. Since the previous survey in 2021, the bee industry has faced several biosecurity challenges. In 2023, there was an incursion of small hive beetle in Tasmania which was successfully eradicated by April 2024. Varroa mite (*Varroa destructor*) has been detected in New South Wales (NSW), Queensland, Victoria and South Australia. Varroa was first detected in NSW in June 2022 and in September 2023 it was determined that eradication was not feasible nationally and the strategy moved to management. At the time of writing of this report varroa mite has not been detected in Tasmania.

According to the [National Varroa Mite Management Program](#), the impact of Varroa on pollination dependent industries will likely be as follows:

- Up to 97% of feral honey bee colonies are expected to be lost within a short period of time.
- The original estimate (2024) for loss of managed hives was about 2-5% loss, however, it is anticipated to be greater than that, pending additional data.
- Reduced hive health and the loss of feral colonies may reduce the effectiveness of pollination.
- Increased management costs to beekeepers will have a flow on affect to pollination reliant industries.
- Reduction in feral and managed hives will increase the demand for pollination services.

Biosecurity Tasmania has released [Tasmania's Varroa Mite Action Plan 2024 – 2034](#), following substantial consultation with stakeholders (including commercial and recreational beekeepers as well as pollination dependent industries). Due to the increased risk of incursion, Tasmania has implemented a ban on the import of queen bees and other potentially infected materials such as used hives and equipment. More information relating to the import/export of bee products can be found by contacting [Biosecurity Tasmania](#).

- Shortage of skilled staff continues to be a challenge for industry. Lack of skilled workers is limiting growth potential, and some apiarists indicated they may need to consider scaling down their operation to ensure business sustainability.



Background economic, policy and environmental context

The Tasmanian Government's approach to supporting the bee industry has been informed by the [Bee Industry Futures Report \(2019\)](#) which outlined headwinds and opportunities for beekeepers. Since then, more than \$750,000 in assistance has been provided to the industry to implement key actions identified in the report.

Industry development activities funded from the Bee Industry Futures Report commitment include a \$120,000 Emergency Winter Feed Program in 2019, \$90,000 towards a \$478,000 Agricultural Development Fund hoverfly pollination project, support for the University of Tasmania (UTAS) to maintain a honey library to validate provenance of Tasmanian honey products (\$20,000) and \$10,000 for a Tasmanian Institute of Agriculture (TIA)/UTAS study into the medicinal and other benefits of leatherwood honey as part of the Cooperative Research Centre for Honey Bee Products.

The industry is also experiencing challenging market conditions, with some reports of beekeepers holding stock, which is impacting the profitability of the industry. This in turn creates cashflow issues for some businesses, culminating in decisions to reduce hive numbers. Climate change impacts on honey production are becoming more evident, with flowering patterns and abundance changing, impacting honey yields per hive. Flowering resources, such as leatherwood, are not only important for honey production but also important for bees to maintain enough food reserves (honey and pollen) to overwinter.

Despite these challenges, the industry has opportunities for growth. Pollination services, though smaller in value relative to honey value, will grow as the agri-food sector aims to lift Tasmania's farm gate value to \$10 billion by 2050. Key growth sectors such as pasture and vegetable seed will potentially drive increased demand for pollination services. After a period of growth in the berry fruit sector, that industry has entered a period of consolidation. There is potential for increased demand for pollination services if further growth eventuates over time.

Leatherwood honey is a unique product produced by the Tasmanian bee industry. If the industry can achieve the profile garnered by Manuka honey, of which New Zealand exports approximately \$245 million, leatherwood honey could grow both the farm gate value and export value of the honey industry. To this end, the Leatherwood Market Development and Promotion project (\$147,000) seeks to improve returns to apiarists from Tasmania's unique leatherwood honey by building its market prestige and brand presence, through promotional campaigns and developing new international markets for this product.



Conclusion

This survey provided an update on information about the size and value of the Tasmanian beekeeping industry and reports on trends since the last survey in 2020-21.

The industry faces ongoing challenges, including variable leatherwood yields arising from climate impacts, a shortage of skilled workers limiting business growth and sustainability, and the potential for the incursion or establishment of Varroa mite to significantly impact the Tasmanian beekeeping sector.

There are growth opportunities for the industry and actions being undertaken to ensure the industry's resilience. Potential expansion of pollination dependent industries will likely see demand for increased pollination services. Furthermore, some beekeepers are already planning to increase their hive numbers to offset potential hive losses from a possible varroa incursion and to meet increased pollination demand created by the loss of feral bee colonies.

Leatherwood is unique to Tasmania. Growth of the Leatherwood market internationally will offer increased income for the honey sector.

In summary, the Tasmanian beekeeping industry's resilience, proactive approach to growth and progress towards best practice biosecurity offer optimism. With strategic planning and adaptation to emerging opportunities, the industry is poised for growth and resilience despite challenges.



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