
*A small industry with a **BIG** impact*

Honey bee industry dynamics *:what the future holds*

Danny Le Feuvre, CEO, AHBIC



Australian Almond Conference, 14 October 2026

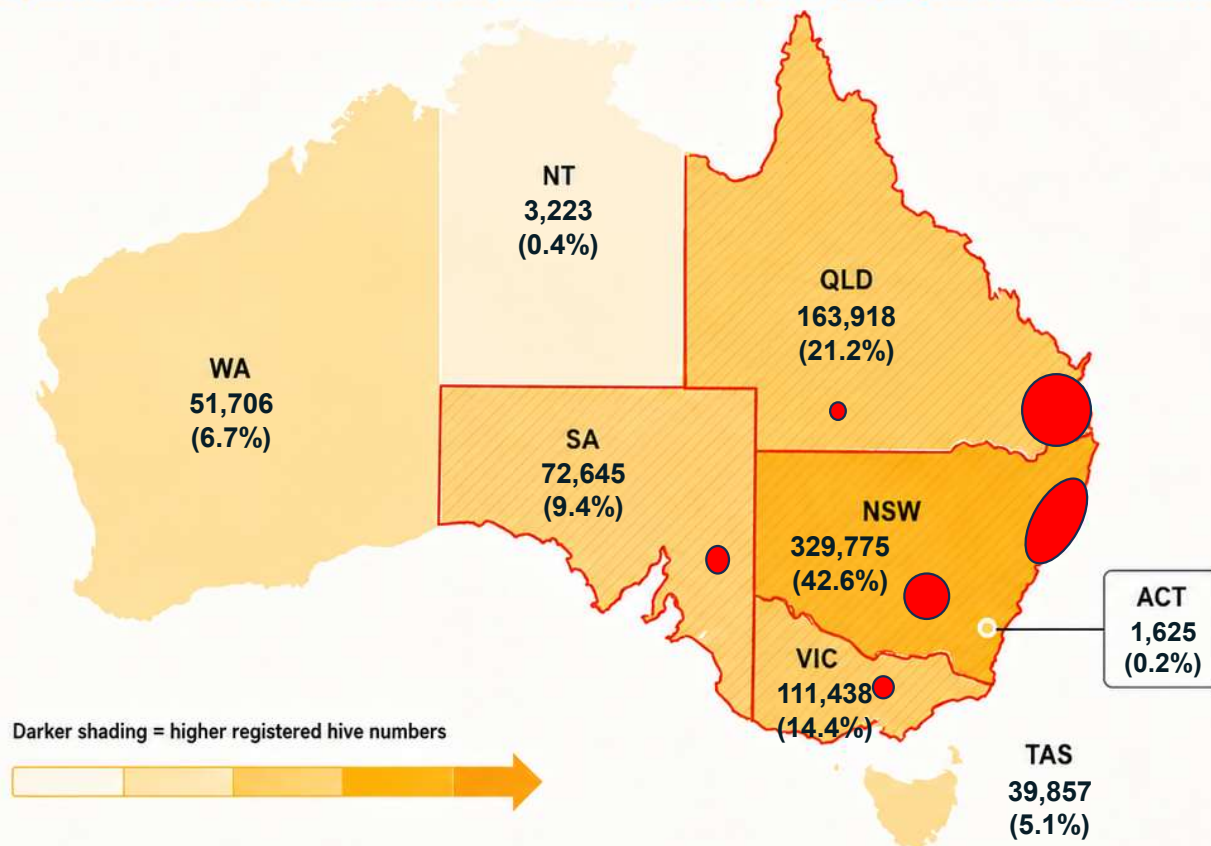
Why are we here....

- Globally significant honey bee pest
- Feeds bee fat bodies
 - Weakens immunity
 - Shortens life span
 - Spreads viruses
 - Eventually kills the colony
- Difficult to manage – few treatments
- Feral bees disappear



Where the hive base sits: Australia's registered hive concentration

Registered hive numbers are concentrated in a small number of states, amplifying regional shocks into national pollination risk.



Source: AHBIC, ALL BK and Hive Numbers National.xlsx, September 2026 compilation.
*WA hive counts carried from 2025. Registrations do not measure colony strength or pollination availability.

National registered hives (2026 compilation*)

774,187



NSW + QLD = 493,693 hives (64%)



NSW, QLD, VIC + SA =
677,776 hives (88%)



Hive capacity is heavily concentrated
in the eastern states and key
production regions.



This concentration means resistant
varroa impacts can quickly become
a national pollination constraint.



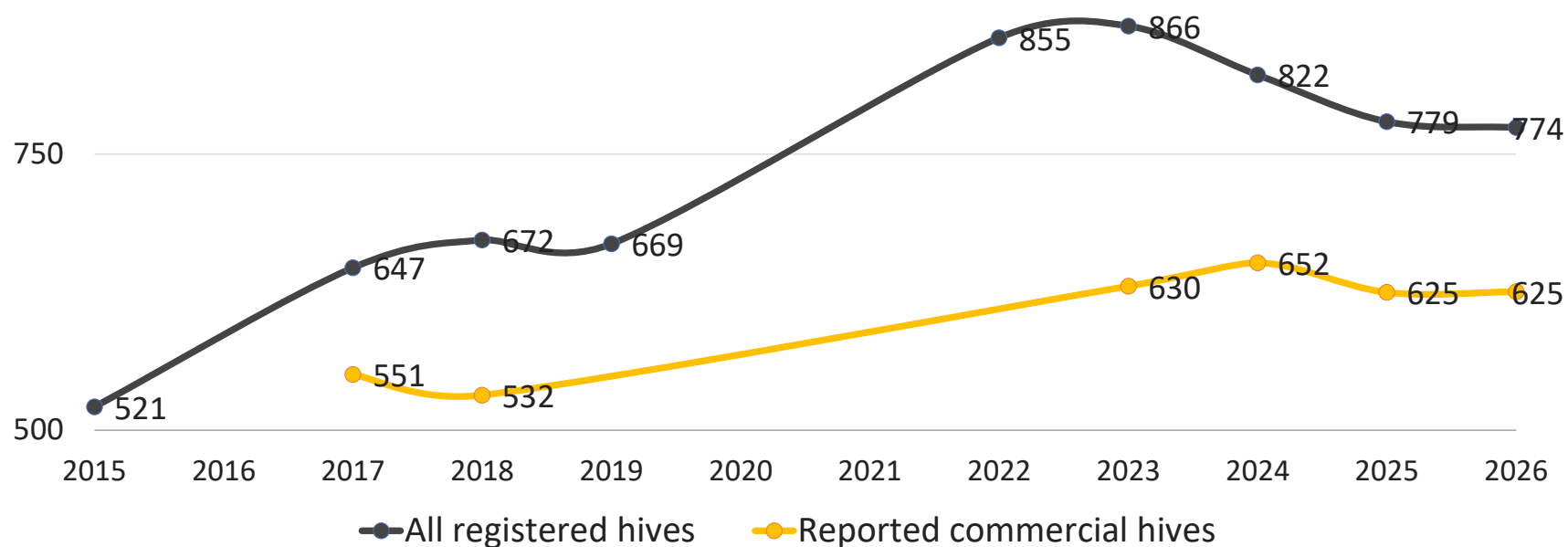
Current varroa spread
SA, QLD, VIC and NSW

These states also contain most of
Australia's hive capacity.

Looking back: hive numbers



Australian registered hives ('000), 2015–2026



Sources: Size and Scope (2024), AHBIC and PHA. Reported snapshots. Lines connect available data.
Commercial categories vary. 2023 commercial figure estimated. 2025 main-tab figures differ from comparisons.
2026 includes WA's 2025 hives. Registrations do not measure mortality or pollination-ready strength.

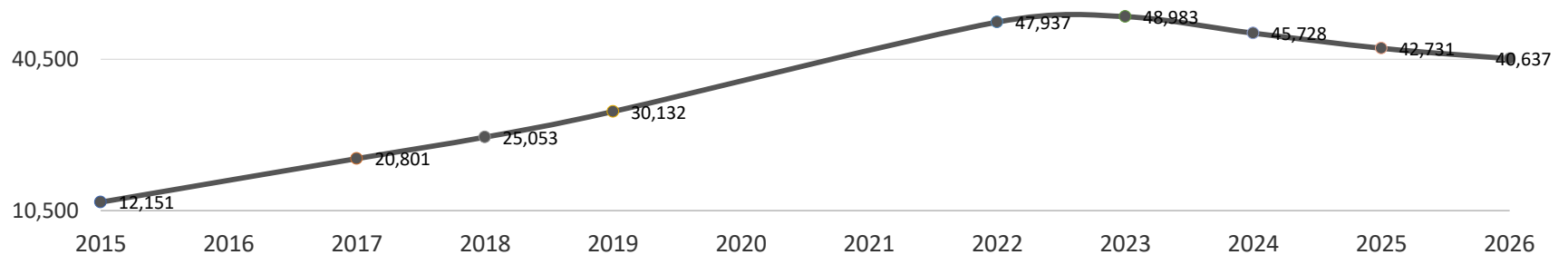


Looking back: beekeeper numbers

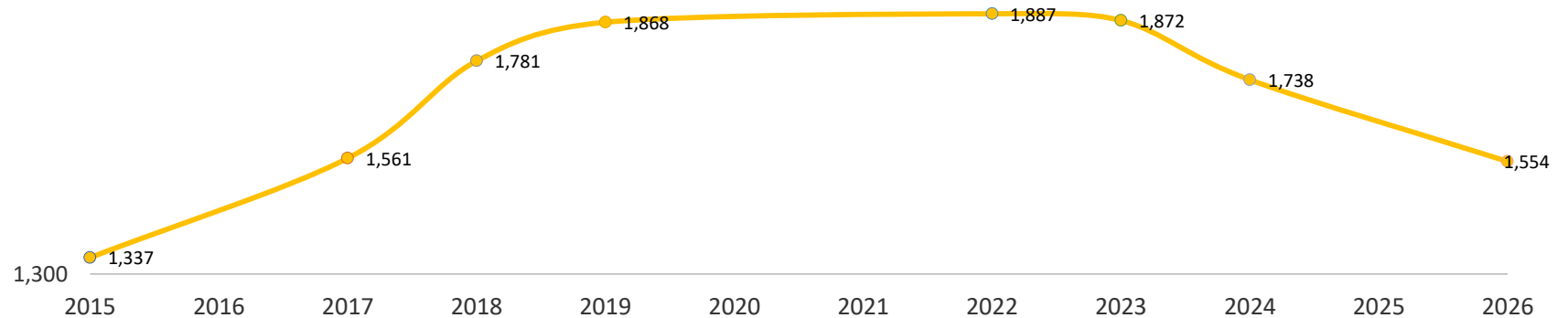


Rebuilding colonies depends on skilled beekeepers

All registered, including recreational



Reported commercial

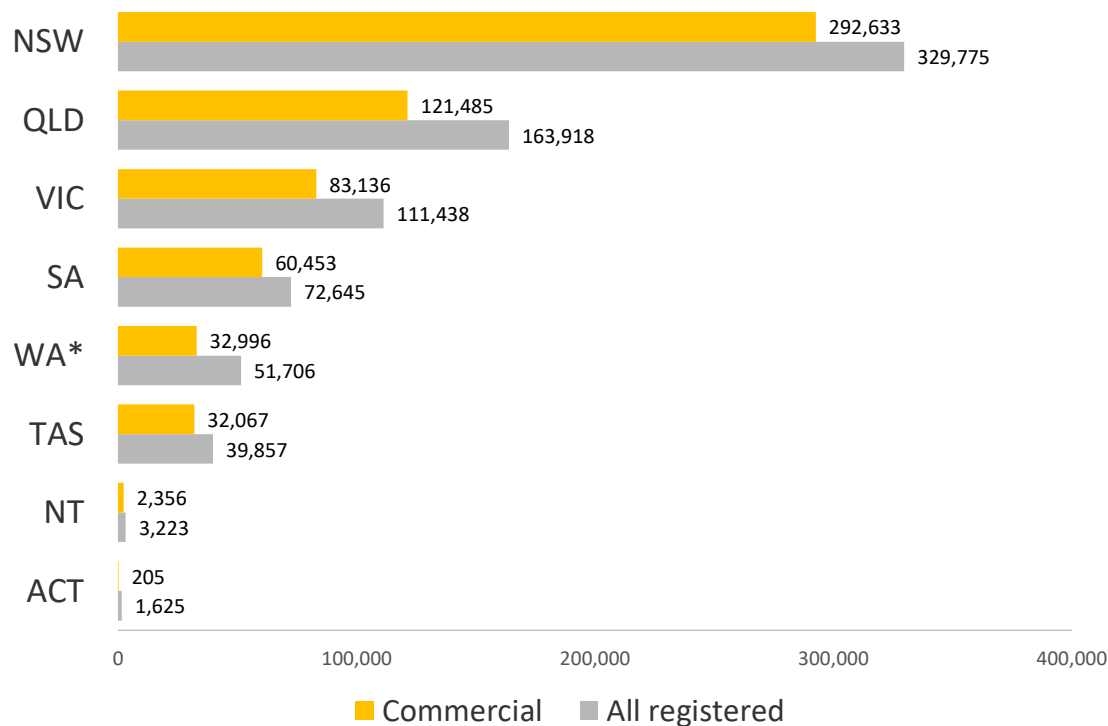




Now: the 2026 hive base



Registered hives by jurisdiction



AHBIC September 2026 compilation. Commercial category: intended 50+ hives.

*WA hive figures carried from 2025. Commercial hives are included within the all-registered total.

NSW + QLD + SA + VIC

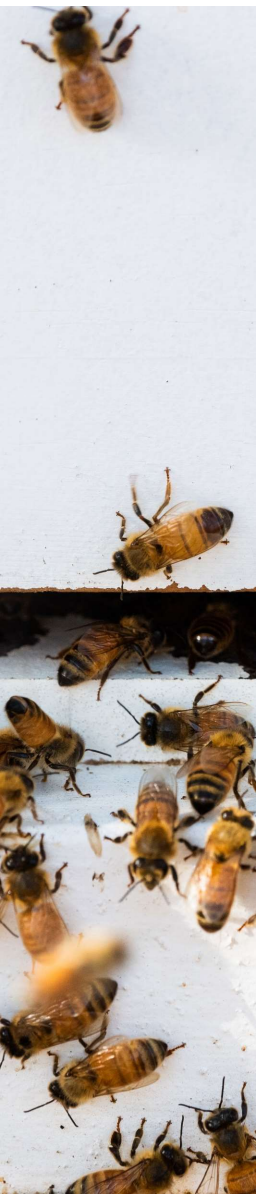
557,707

registered commercial hives
in the four-state pool

Theoretical pool for pollination

NSW + VIC + SA

436,222



Almond plantings and hive demand



Australian almond plantings

~75,000ha

hectares of total plantings

Almond pollination requirement

~300,000

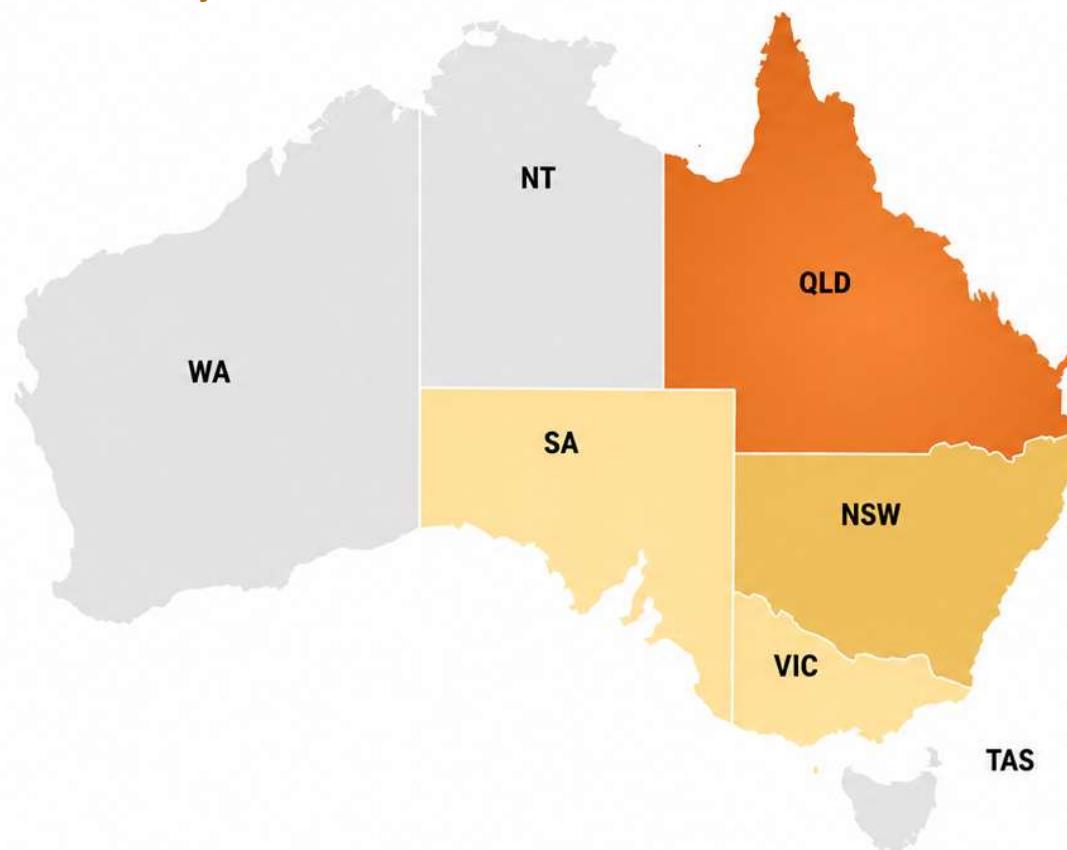
colonies required each
almond season

\$60 m+

estimated 2026
pollination spend

Varroa: different local stages

Indicative industry assessment • 7 October 2026



Earlier-established NSW areas

Some areas are past the first invasion peak.
Reinvasion and management continue.

Affected Queensland regions

Acute invasion and reinvasion pressure
in affected regions.

Victoria and South Australia

Spread is under way, with substantial
reinvasion risk ahead in later-affected areas.

Stages vary within states. Colours indicate broad phases, not measured mite load.
Grey: jurisdictions outside this comparison. Sources: AHBIC field reports, Nuffield (2025) and state biosecurity authorities.

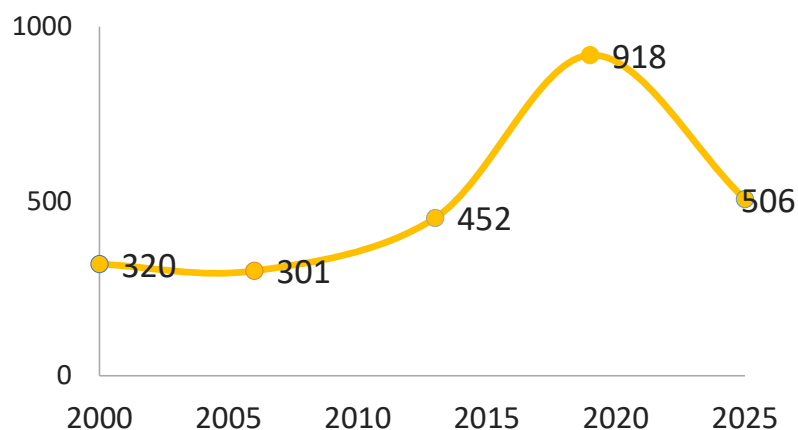


Looking ahead: New Zealand

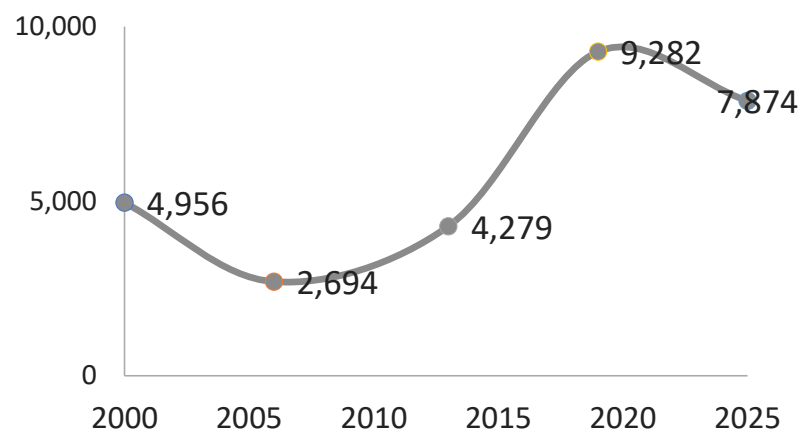


Selected snapshots: 2000, 2006, 2013, 2019, 2025

Registered hives (thousands)



Registered beekeepers



**Mānuka profits supported expansion after early adjustment.
Australia cannot assume the same profit lift.**

Sources: AgriQuality, MAF/MPI and NZBB. Later contraction reflects market pressure. Snapshot dates vary. Varroa detection: North Island 2000; South Island 2006.

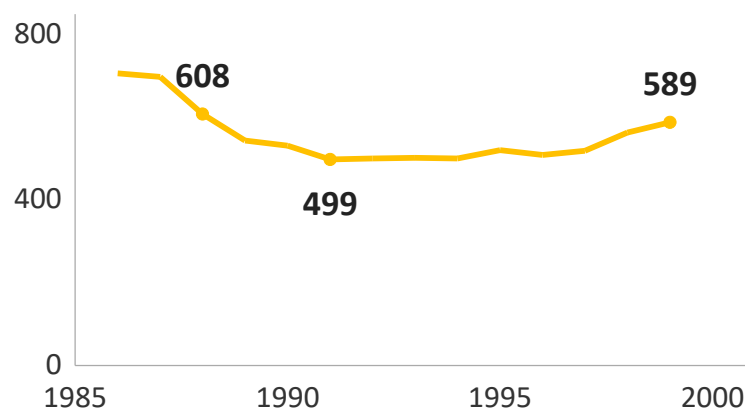


Looking ahead: Canada

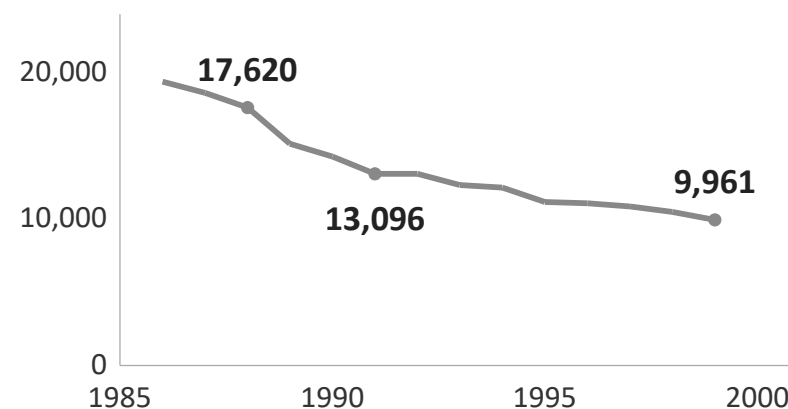


Annual estimates, 1986–1999

Colonies (thousands)



Beekeepers



1988–1999: beekeepers down 43.5%, colonies down 3.2%

Fewer beekeepers, despite colony numbers rebuilding

Later recovery: 2025 had 16,360 beekeepers and 854,653 colonies

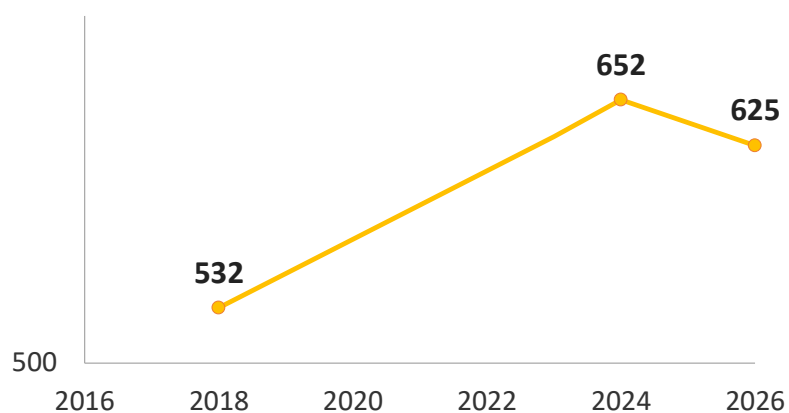
Source: Statistics Canada 32-10-0353-01, checked 12 Oct 2026. Excludes Newfoundland and Labrador.
Reported beekeepers; multiple causes. Decline predates local Varroa detection in 1989; not a causal estimate.



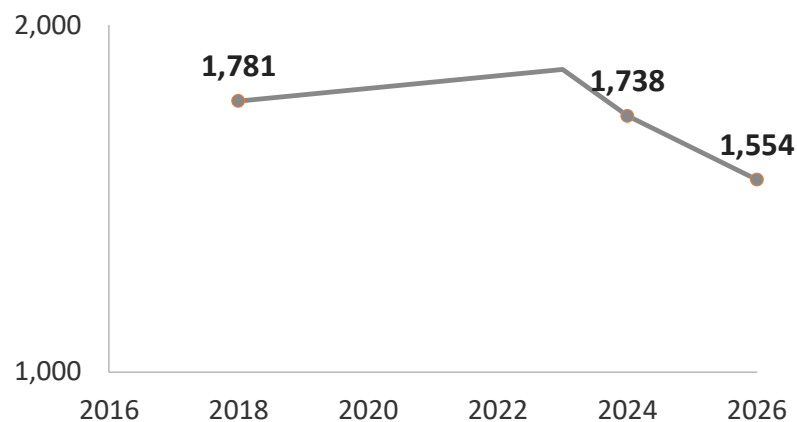
Australia: signs of restructuring

Selected commercial snapshots: 2018, 2023*, 2024, 2026

Commercial hives (thousands)



Commercial beekeepers



2024–2026: beekeepers down 10.6%, hives down 4.0%

A pattern consistent with restructuring

Sources: AHBIC and Size and Scope (2024). *2023 hives estimated. 2026 WA hives carried from 2025. Commercial thresholds vary (50+ / >50). AU, NZ and Canada series differ. Registrations do not establish exits or causes.



Viability shapes future supply



Australia cannot plan on a mānuka-style honey boom.

More work to keep each colony productive

Monitoring, treatment, nutrition and replacement become continuing business costs.

Pollination income matters to recovery

Capacity will depend on whether operators can retain people, rebuild colonies and keep investing.



Next August starts in autumn



Autumn

Agree numbers, colony strength, timing and terms.

Winter

Prepare colonies and flag changes in availability.

4–6 weeks before flowering

Reconfirm delivery, numbers and the inspection plan.

At delivery

Check a representative sample and resolve gaps early.



AHBIC's national work



Treatment coordination

AHBIC agreed to coordinate a national group with the relevant jurisdictions and parties.

Pollination supply and demand

AHBIC agreed to bring industries together to decide the next step, based on available data.

The wider agenda includes practical field advice, workforce capability and recovery resources.



The next season starts now

**Dependable pollination needs
strong colonies and viable
beekeeping businesses.**

An early, clear agreement gives both sides time to prepare.

Questions

