



NSW APIARISTS' ASSOCIATION INC.

ABN: 89 417 216 326

NSW Apiarists Association submission to the request from the House Standing Committee on Agriculture and Water Resources Inquiry into growing Australian agriculture to \$ 100 billion by 2030.

Preamble

This submission from the NSW Apiarists Association (NSWAA) welcomes the opportunity to provide constructive feedback to the Inquiry into "Growing Australian agriculture to \$100 billion by 2030" outlining opportunities and impediments to the beekeeping industry sector.

The NSWAA supports the challenge provided by Mr Rick Wilson MP, Chair of the Agriculture and Water Resources Committee in his statement on 3 September 2019 requesting from the Inquiry opportunities that will increase the efficiency, sustainability, and productivity of farms that will drive growth in Australian agricultural businesses.

The NSW beekeeping industry provides this submission as the nation's leader in the production of honey and its ownership of hives that account for 40 – 45% of the national honey crop. The Association is of the firm belief that increasing and improving honey bee pollination along with education of the importance of pollination and its productivity benefits across pollination dependant crops will be one of the keys for growing Australian agriculture to \$100 billion by 2030.

1. Background to respondent organisation.

The NSWAA is the peak industry body for NSW's 839 commercial apiarists and has provided over a century of service to its members. The NSWAA represents a majority of the state's commercial beekeepers and the NSW apiary industry is characterised by:-

- Contributing \$36 million annually to the NSW economy from the value of honey and associated bee products.
- Contributing to \$94 million of national gross value of honey and associated bee products.
- Providing the greatest number of commercial pollination hives nationally that service the 35 agricultural industries dependant on honey bees for their production. On a national basis a conservative economic value of the pollination of agricultural industries is estimated to be in a range of \$4 - \$6 billion, however this contribution continues to be scaled upwards towards \$ 8 to 12 billion as the value of horticultural and agricultural crops increase.
- Being the nation's leader in production of honey and ownership of hives accounting for 40 – 45% of the national honey crop.
- Having approximately 8,600 registered beekeepers accounting for 293,833 registered hives (1).

2. Opportunities and Impediments to Beekeeping in Australia

The following two tables summarise the current opportunities and impediments for the beekeeping industry in NSW and Australia (2).



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Table 1- Opportunities for the Australian beekeeping industry :-

OPPORTUNITIES -			
Business / Financial	Production & marketing	Human	Environment
Increased fees for pollinators.	Improved queen bee breeding program based on imported genetics and develop opportunities to import superior genetic resistant material.	Better cooperation within the beekeeping industry nationally.	Containment program for <i>apiscerana</i> .
Development of a pollination pricing regime and contracts that will provide confidence, stability and the willingness to invest and grow.	Coordinated industry approach to marketing and industry promotion and communicate to consumers the non chemical disease control methods used by the industry.	Continued research for productivity gains.	An industry developed and driven national strategy to gain increased access to native forests and public lands.
Educate beekeepers on the advantages of enterprise diversification as a business strategy including pollination.	Develop a database of prioritised research areas of need that are aligned with a benefit :cost analysis for promotion to the research and development providers.	Beneficial outcomes from constructive communication and collaboration between beekeeper pollinators and horticulture and other pollination dependant industries.	Development of a national strategic plan to support an Australian apiary industry that is inclusive of beekeepers / pollinators and pollination dependant industries.
Explore and promote the range of funding and networking opportunities for the national body the Australian Honey Bee Industry Council (AHBIC) and industry participants.	Identify opportunities for the highest value add possibilities available to honey and its by products (<i>medi honeys / health food and beauty aids</i>) and promote these,	Develop a communication / media strategy to address advocacy needs through to the development of linkages with agribusiness and potential investors in pollination dependant industries.	
Grow the industry through promotion of the honey bee industry to amateurs and others from a whole of supply chain perspective.	Develop a price margin over imported product pricing and international competitors derived from the promotion and marketing of the unique characteristics of Australian honey as value to the domestic and international markets.	Development of a succession planning program to support the maintenance of current production levels with the intention of industry growth.	
	Further strengthening of biosecurity to maintain our market / comparative advantage over competitor nations.		

Table 2: - Impediments to the Australian beekeeping industry :-

Impediments			
Business / Financial	Production & marketing	Human	Environment
Poor business knowledge and skills in the beekeeping industry. Historically beekeepers have rejected attempts to lift financial / business management skills.	Beekeeper mobility provides the potential for the spread of pests and disease.	Loss of critical mass of beekeeper expertise and training / mentoring though an ageing industry. The accumulated knowledge held by the current generation of beekeepers has not been successfully transferred to the next generation of beekeepers.	Locking up of / barriers to floral resources especially public and private native forests combined with an inability to effectively lobby Government for access to public lands for bees.
Limited data and a resultant lack of key performance indicators for industry. No national / state business or industry benchmarking projects in place.	Government and the agricultural industry underestimates the value of the pollination service and the strategic importance of the honey bee industry.	The Australian honey bee industry is fragmented. Lack of a detailed and comprehensive national plan to address and give a clear position on areas such as biosecurity risk, imports, ageing industry participants, external challenges to production, research and development and mechanisms to grow the industry.	Apparent lack of will and commitment on the part of Government to adequately support biosecurity measures to protect the Australian honey bee industry.
Likely pollination demand and predicted returns for beekeepers is not available or hard to obtain.	Limited or no control of the application of pesticides with spray drift risk adjacent to areas of bee activity.	Beekeepers must compete for limited floral resources where such competition creates / encourages limited communication between beekeepers.	Beekeepers are reliant on access to resources on public and private lands owned by others - therefore as non landholders they have limited control.
Difficulty in accurately identifying returns to beekeepers / pollinators from pollination activities.	Lack of support and understanding of pollination practice from the broad pollination dependant industries. Lack of education and understanding by industries that benefit from pollination of the financial and environmental benefits of using bees for pollination.	The attraction of an independent lifestyle, a nomadic type existence and the need for secrecy around floral resource locations provides a profile that clashes with the position description required for a 21 st century beekeeper / pollinator.	Concerns regarding the adequacy of preparation to deal with an anticipated varroa incursion and other exotic pests harmful to bees.

	Impediments - continued		
Business / Financial	Production & marketing	Human	Environment
Levy funds for R & D are declining due to lower honey production.	The bio-security system is inadequate against exotic pests and diseases.	The role of a beekeeper is physically demanding while confronted with constant workplace health and safety issues and time away working that is not family friendly	Available bee sites on public and private lands are rare. Sites are securely held by other beekeepers and are difficult to obtain.
Beekeepers are price takers.	Marketing and supply chain management is not well understood by beekeepers.	Loss of beekeepers and associated production / pollination through retirement.	Bushfires, droughts, floods and storms / cyclones, land clearing and eradication of weeds all reduce the availability of floral resources combined with a lack of acknowledgement of the threat posed by climate change to production and key resources.
AHBIC, the national body, lacks a sustainable financial base from the challenges associated with long term funding.	The number of hives available cannot meet the demand from pollinators.	A lack of understanding and knowledge of pollination and honeybees by farm advisors for example agronomists.	Threat of backyard/amateur beekeepers to biosecurity in the event of a disease outbreak.
Lowering of profitability as a result of increased supermarket buying power.	Imported honey substitution.		Government policies that restrict beekeepers access to public lands.
Cost price squeeze for beekeepers.	Perceptions of quality especially maintenance of clean green claims.		Logging practices that leave few mature trees and also alter the species mix of the forest.



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3. Concluding comments

As Australian agriculture plans for the next decade they cannot do this in the absence of consideration of the honey bee *apis mellifera*. Without the honey bee Australian agriculture, whether it be livestock or plant industries, would cease to be profitable however for too long the needs of the honey bee industry have been neglected by both Government and agricultural industries generally. The recent decline in hive numbers has now ascribed a value to pollination services by many of the pollination dependant industries and this has generated both a demand and a value for pollination services.

Honey bees in their role as pollinators are significant contributors to agricultural production. In fact honey bees are key to measureable productivity gains through yield increases wherever they pollinate. The potential for greater productivity is currently stalled by the limited access to public lands in NSW and the floral resources therein that underwrite honey bee health and vigour necessary for pollination activities. One horticultural industry, the almond industry, will require the placement of 270,850 hives in almond orchards by 2025 or 60 % of Australia's current total number of commercial hives. Almonds are completely dependent on honey bees and they achieved a farm gate value of approximately \$750 million from February 28, 2018 to March 1, 2019 (3). Almond exports in the 2017 / 2018 marketing year accounted for \$ A 429 million (4).

NSW and Australia are uniquely placed to capitalise on the significant opportunities that will be created by the global communities increased demand for food. The honey bee industry can contribute through its pollination function to efficiency, sustainability and productivity through wider recognition, support and increased adoption by the relevant agricultural industries.

However to be able to expand pollination services access to floral resources provided by Australia's unique multi species, multi layered eucalypt forests is essential. Floral resources are more significant to commercial beekeepers than any other issue – including biosecurity. The NSWAA lists as key priority number 1 in its current business plan " fair and secure access to essential floral resources held within public lands". This position is consistent with the Australian Honey Bee Industry Council's (AHBIC) strategic plan 2018 - 2023 that lists as number 1 high priority issue " improving floral resource access". Without access to a range of flowering species capable of delivering floral rewards in the form of nectar and pollen, a honey bee colony will perish.

The NSW and Australian honey bee industries are a key component to any developments involving the growth of Australian agriculture towards 2030. The beekeeping industry stand ready to assist this Federal Government initiative in any way requested with the expectation that sound policy development favouring the growth of the honey bee industry and thereby agriculture is an outcome. The NSWAA Executive would welcome an opportunity to contribute in person to the House Standing Committee on Agriculture and Water Resources Inquiry into growing Australian agriculture to \$ 100 billion by 2030.

The NSWAA is hopeful that this response will be made publicly available.

Stephen Targett CSM
President NSWAA

Source

1. NSW Department of Primary Industries - Honey Bee Industry Team report to NSWAA Annual Conference. 16 - 17 May 2019. *Statistics current at 29 March 2019.*
2. Personal communication - members of the AHBIC Strategic Planning Workshop, Melbourne, March 2018.
3. Spence A. **Record crop to drive Australian almond exports.** The Lead - News leads from South Australia.
4. Almond Insights 2017 - 2018. Almond Board of Australia.