

Honey Bee Industry Emergency Roundtable

Technical Workshop Pre-read Paper

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Purpose

This paper provides a shared evidence base for the technical workshop and supports development of an agreed action pathway for industry and government decision-makers. It synthesises evidence on the current resistant Varroa challenge, the impacts on beekeepers and pollination-dependent industries, the market failure case for intervention, and a consolidated set of proposed actions to be tested and refined in the workshop.

Scope note

This document is designed as a workshop pre-read. It is intentionally action-oriented and should be read as a basis for discussion, not as a final government or industry position. Proposed actions require testing against legislative authority, funding pathways, implementation feasibility and jurisdictional responsibilities.

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1. Background

Australia's honey bee and pollination system is entering a critical structural transition period. The establishment of *Varroa destructor* (Varroa) has shifted from a contained biosecurity incursion to an endemic management challenge, with the added complication of new treatment-resistant mite population. The issue is no longer confined to beekeeping. It is a cross-sector agricultural, biosecurity and food security risk.

European honey bees are a critical biological input for Australian agriculture. AgriFutures Australia has estimated that crops worth approximately \$12.9 billion are at least partially reliant on honey bee pollination, with an estimated \$4.6 billion in economic contribution attributable to honey bee pollination (Gillespie, Clarke and Frost, 2024). These crops include horticultural, broadacre, seed and pasture systems. Their reliance on pollination is not limited to yield; pollination also affects fruit set, quality, size, shelf life and market value.

The national Varroa response has already moved through eradication and transition-to-management phases. The transition plan included industry upskilling through 110 face-to-face workshops, management guides, updates to the Biosecurity Code of Practice and Biosecurity Manual for Beekeepers, pathways for alternative Varroa control products, strengthened diagnostics, harmonised movement conditions, a national colony loss survey and exploration of a national data system.

Since then, the risk profile has escalated. Miticide resistance to pyrethroid and formamidine-based treatments has been reported across multiple jurisdictions, compromising key synthetic treatment options relied upon by beekeepers. While integrated pest management has always been central to Varroa control, the loss of effective synthetic chemical tools substantially increases the effort, cost and complexity required to maintain basic colony health. Beekeepers are increasingly forced to rely on more labour-intensive monitoring regimes, non-chemical interventions and organic treatments, which may provide less consistent control and place additional pressure on business viability. The technical workshop should therefore proceed from the premise that Australia is managing a combined biosecurity, agricultural production and market transition problem. The task is not simply to improve beekeeper knowledge. The system requires coordinated action across governments, regulators, industry bodies, research organisations, pollination-dependent sectors and commercial beekeepers.

2. Impacts

2.1 Impacts on the honey bee industry

It is recognised that insufficient data (or incomplete information) constrains effective planning and decision-making around assessing the current state of the industry. However, a combination of anecdotal, early hive registration data and empirical industry survey data is providing early indications of the impacts of varroa.

The impacts on commercial beekeepers are severe and uneven. NSW registration data shows a 35% fall in registered commercial beekeepers since the shift from eradication to management in late 2023. A May 2026 AHBIC industry pulse survey found that a further 39% of NSW commercial respondents expect to leave the industry within the next 12–24 months. In Queensland, where the impacts are not yet reflected in registration data, 47% of commercial beekeeper respondents said they are considering exiting over the same period.

Beekeepers are experiencing an escalating and unprecedented crisis, with treatment-resistant Varroa affecting business operations, increasing treatment and labour costs, and contributing to livestock losses occurring over days to weeks in some cases.

The economic shock is driven by both direct colony losses and changed operating requirements. Organic and non-synthetic treatments are more labour intensive and can be more costly to apply, while treatment resistance increases the risk that beekeepers only identify a problem after treatment failure and elevated mite loads. These costs are landing on businesses already exposed to low honey prices, rising input costs, labour constraints, drought, biosecurity compliance obligations and declining access to floral resources.

The industry's underlying structural position was already fragile before the recent identification of treatment resistance in Feb 2026. The AgriFutures size and scope report notes falling honey production per commercial hive, pressure on farmgate honey prices and a transition toward higher reliance on paid pollination income (Clarke and Le Feuvre, 2024). This transition requires viable businesses, skilled labour, secure floral resources and functioning treatment options.

2.2 Impacts on pollination-dependent industries

The Pollination Security Status Report 2026 identifies Varroa as the most immediate and significant threat to Australia's pollination security because of its likely impact on both feral and managed honey bee populations (Wheen Bee Foundation, 2026). The report models a range of scenarios comparing commercial hive supply with the demand generated by 40 pollination-dependent crops during peak periods.

Under a severe Varroa-related impact scenario, where feral honey bees decline and managed commercial hives fall by 60% (as per US experience), modelling indicates a potential shortage of approximately 290,000 hives once varroa is established during the August peak pollination period across NSW, Victoria, Queensland and South Australia (Wheen Bee Foundation, 2026). Whilst this is the 'worst case' scenario, without collective intervention it is a plausible trajectory.

The system is particularly vulnerable because Australia has historically relied on feral honey bees as an unpaid or free pollination service. International experience suggests Varroa can completely decimate feral honey bee populations. The loss of this background pollination service is expected to expose gaps between realised pollination and required pollination, particularly in crops and regions that have historically depended on unmanaged pollination.

Rabobank modelling also highlights the emerging supply-demand imbalance. It reports that hive demand in Australia has tripled since 1990, while the number of commercially managed hives has barely grown, and that all modelled Varroa scenarios indicate pollinator shortfalls within three to five years due to combined hive reductions and growth in horticultural acreage (RaboResearch, 2025).

2.3 Impacts on food security, regional economies and resilience

Reduced pollination capacity is unlikely to present as a single catastrophic failure. More likely, impacts will appear as higher pollination prices, reduced hive strength, more variable crop yields, reduced harvest quality, lower pack-out rates, supply volatility and higher production costs. These impacts may then flow through to regional economies, consumers and export markets.

Pollination needs to be framed as a critical national agricultural input comparable to water, fuel or fertiliser, but one that is not yet treated as such in policy frameworks. It identifies the immediate risk as a combination of biological pressure on honey bees, economic fragility within beekeeping businesses, and underdeveloped market and governance systems.

The risk is broader than hive numbers alone. Australia risks losing skilled operators, pollination logistics capability, queen breeding capacity, regional business infrastructure and hard-won knowledge that cannot be rebuilt quickly. Once commercial beekeepers exit, the market may not be able to restore capacity in time to meet seasonal pollination demand.

3. Market Failure

The current Varroa situation meets multiple criteria for market failure and justifies targeted government intervention. The case for intervention is strongest where it is designed to correct market, coordination and information failures, preserve critical capability, and support an orderly transition to endemic Varroa management.

3.1 Public benefit and private cost mismatch

Pollination produces substantial public and cross-sector benefits that are not fully captured by beekeepers. Beekeepers bear the direct costs of Varroa management, labour, treatments, supplementary

feeding, hive replacement, compliance and lost honey production. However, the broader value of pollination flows to crop producers, food supply chains, regional economies and consumers. This creates a structural underpayment problem: the market does not currently return enough value to the sector that maintains the pollination asset.

3.2 Loss of an unpriced ecosystem service

Australia has relied on an unpriced ecosystem service: feral honey bee pollination. The loss of this background pollination safety net is likely to increase demand for managed hives, but the commercial pollination market is not yet mature enough to efficiently absorb that demand. This is a classic externality problem. The cost of losing feral pollination will be borne by growers and consumers, while the capacity to replace it depends on commercial beekeepers who are already under financial and operational stress.

3.3 Coordination failure

Pollination supply is national and mobile, while regulatory settings, movement controls, land access, chemical permits, surveillance systems and emergency support are split across jurisdictions. No single actor can solve the system problem alone.

3.4 Information failure

Australia lacks sufficiently integrated national data on hive strength, hive availability, treatment resistance, colony losses, feral bee decline, pollination demand and pollination service quality. Poor information leads to delayed investment, inadequate risk pricing and insufficient preparedness by growers and governments.

3.5 Thin market and regulatory bottlenecks

Effective Varroa management depends on a small number of approved products, several of which are now affected by resistance or practical limitations. This creates a thin-market and regulatory bottleneck in treatment access. It limits beekeeper capacity to respond quickly, especially where resistant mites are identified after treatment failure has already occurred.

3.6 Capability failure risk

Commercial beekeeping is not a commodity input that can be rapidly imported or rebuilt. It requires skilled labour, queen supply, equipment, disease management, logistics, public and private land for resource access and pollination relationships. Once operators exit, replacement is slow and uncertain. This creates an argument for temporary stabilisation support to preserve productive capacity while the market transitions to a post-Varroa operating model.

Government intervention should therefore be targeted, time-limited where appropriate, and designed to correct market, coordination and information failures rather than permanently replace market signals. The aim is not to shield industry from all adjustment. The aim is to prevent disorderly collapse of pollination capacity before new treatment systems, market settings and policy frameworks can mature.

4. Proposed Actions

The following proposed actions consolidate themes directly from beekeepers, AHBIC, industry associations, AgriFutures literature and policy work, the Pollination Security Status Report, Rabobank modelling and industry correspondence. They are presented for technical workshop testing, refinement and allocation of owners.

4.1 Immediate industry stabilisation and financial support

Problem: Commercial beekeepers are absorbing rapid cost increases, treatment failures, livestock losses and labour demands before pollination markets can reprice risk.

	Action	Proposed lead	Supporting partners	Timing
4.1.1	Develop a time-limited emergency support package for affected commercial beekeepers that provide, or are capable of providing, pollination services, beyond existing RIC products.	Commonwealth and states	AHBIC, state associations, rural finance agencies	Immediate
4.1.2	Provide treatment cost support, including bulk purchasing or subsidised supply of legally available treatments.	States and Commonwealth	Suppliers, AHBIC	Immediate
4.1.3	Provide reimbursement or subsidy for Varroa management equipment, PPE and consumables, including vaporisers, batteries, respirators, cartridges and gloves.	States	State associations, AHBIC	Immediate
4.1.4	Provide subsidised access to rapid virus testing allowing beekeepers and queen breeders to monitor viruses.	States	AHBIC, Diagnostic labs	Immediate
4.1.4	Provide support for supplementary feeding, hive sterilisation, freight and hive replacement where losses are linked to resistant Varroa and associated disease pressure.	States	Rural assistance authorities, AHBIC	Immediate to short term
4.1.5	Establish concessional loans or government-backed recovery loans for viable commercial businesses facing cash-flow shocks.	Commonwealth and states	Rural finance agencies	Immediate to short term
4.1.6	Provide access to business resilience, financial management and mental health support through trusted industry delivery channels.	States	AHBIC, state associations	Immediate to short term

4.2 Treatment access, APVMA pathways and supply chain security

Problem: Resistance has reduced the effectiveness of key synthetic treatments, while current permits and product supply chains do not yet provide the flexibility needed for Australian operating conditions.

	Action	Proposed lead	Supporting partners	Timing
4.2.1	Convene an urgent APVMA-industry-jurisdiction technical pathway meeting to identify priority permit amendments, label inconsistencies and new product access pathways.	APVMA, NSW DPIRD and DAFF	States, AHBIC, permit holders	Immediate
4.2.2	Review current emergency use permits for dosage, frequency, temperature constraints, brood conditions and practical use across northern and southern production systems.	NSW DPIRD, APVMA	Permit holders, technical experts	Immediate
4.2.3	Fast-track lawful access pathways for existing global Varroa treatments where residue, safety and efficacy requirements can be met.	APVMA	Registrants, states, AHBIC	Immediate to short term
4.2.4	Establish practical applied research field trial pathways for regionalised treatment regimes under Australian conditions, including resistant mite scenarios.	RDCs and states	Universities, commercial operators, AHBIC	Immediate to short term
4.2.5	Develop a national Varroa treatment supply chain plan, including demand forecasting, bulk purchasing options and supplier engagement.	Commonwealth and states	AHBIC, suppliers	Immediate to short term
4.2.6	Map international developments, including RNAi technologies, and assess Australian regulatory and commercialisation pathways.	RDCs and APVMA	Research institutions, industry	Short to medium term

4.3 National resistance surveillance, diagnostics and transparent reporting

Problem: Resistant mites are often detected after treatment failure, when mite loads may already be beyond economic control.

	Action	Proposed lead	Supporting partners	Timing
4.3.1	Establish a coordinated national miticide resistance surveillance program using agreed sampling protocols, genetic testing and rapid reporting.	DAFF and states	PHA, AHBIC, laboratories	Immediate
4.3.2	Increase laboratory capacity and turnaround times for resistance and virus confirmation, including approved private laboratory pathways where appropriate.	States	Private labs, DAFF	Immediate
4.3.3	Develop a national resistance map or dashboard that protects commercially sensitive information while providing actionable regional risk intelligence.	DAFF and states	AHBIC	Immediate to short term
4.3.4	Require or strongly encourage post-treatment monitoring and reporting of suspected treatment failure.	States	AHBIC, State associations	Immediate
4.3.5	Align resistance reporting with existing systems such as Bee 123, colony loss surveys and jurisdictional surveillance platforms.	States and DAFF	PHA, AHBIC	Short term

4.4 Extension, advisory support and beekeeper capability

Problem: Beekeepers need practical, trusted and sound advice that can keep pace with treatment resistance, changing permits and regional operating conditions.

	Action	Proposed lead	Supporting partners	Timing
4.4.1	Maintain and expand Varroa Development Officer and Bee Biosecurity Officer functions beyond the transition-to-management period.	States and DAFF	AHBIC	Immediate
4.4.2	Support non-government technical applied extension through trusted industry bodies and universities.	AHBIC and state associations	RDCs, states	Immediate
4.4.3	Develop region-specific integrated pest management guidance for northern, subtropical, temperate and migratory beekeeping systems.	States, Researchers and AHBIC	Commercial beekeepers	Immediate to short term
4.4.4	Establish rapid technical bulletins following resistance detections, permit changes or treatment failures.	AHBIC and states	APVMA, technical experts	Immediate
4.4.5	Build peer-to-peer learning networks using experienced commercial beekeepers and biosecurity champions.	State associations	AHBIC, states	Short term
4.4.6	Develop grower-facing guidance on protecting bee health during pollination, including chemical use, water, site placement, access tracks and timing of sprays.	RDCs and crop bodies	Hort Innovation, AHBIC	Short term

4.5 Pollination security and market development

Problem: Australia's managed pollination market is not yet mature enough to replace declining feral pollination and absorb Varroa-driven operating costs.

	Action	Proposed lead	Supporting partners	Timing
4.5.1	Establish a national pollination supply-and-demand forecasting process before each major pollination season.	AHBIC, Crop industries	RDCs, states	Immediate
4.5.2	Create an annual pollination risk statement for major pollination-dependent industries, including almonds, macadamias, berries, avocados, apples, pears, cherries, cucurbits and seed crops.	AHBIC and crop bodies	Wheen Bee Foundation, Hort Innovation, RDCs	Immediate to short term
4.5.3	Improve pollination contracts so they reflect hive quality, biosecurity risk, treatment cost, logistics and grower responsibilities for those crops where it is not already established.	Industry-led	Legal support, RDCs	Short term
4.5.4	Develop contingency planning for August/September peak pollination, including priority crop demand, hive movement logistics and protocols for shortages.	States and AHBIC	Crop bodies, brokers	Immediate
4.4.5	Encourage pollination-dependent industries to co-invest in beekeeper capacity, surveillance, treatment access, research and extension.	Crop industries and RDCs	Commonwealth, states, AHBIC	Immediate to medium term

4.6 Workforce, skills and business capability

Problem: The industry is labour constrained, ageing and facing a loss of technical expertise at the same time that Varroa management increases labour demand.

	Action	Proposed lead	Supporting partners	Timing
4.6.1	Develop a national honey bee and pollination workforce strategy.	AHBIC and Hort Innovations	Jobs and Skills Australia, states, RTOs	Short term
4.6.2	Review skilled and semi-skilled migration pathways, including PALM scheme suitability and relevant occupation shortage listings.	Commonwealth	AHBIC, state associations	Immediate to short term
4.6.3	Establish beekeeper training and traineeship pathways focused on commercial operations, pollination logistics and Varroa integrated pest management.	RTOs and states	AHBIC, industry	Short to medium term
4.6.4	Support business coaching, succession planning and productivity tools for commercial beekeepers.	States and RDCs	AHBIC, state associations	Short term
4.6.5	Develop labour-saving technology and equipment adoption grants where they directly improve Varroa management or pollination capacity.	States and RDCs	Commercial operators, suppliers	Short to medium term

4.7 Research, development and innovation

Problem: Existing research activity is valuable but fragmented, and current industry destabilisation may occur before long-term solutions are commercially available.

	Action	Proposed lead	Supporting partners	Timing
4.7.1	Establish a coordinated 10-year national Varroa and pollination resilience R&D framework.	Commonwealth, states and RDCs	AHBIC, universities	Short term
4.7.2	Establish a coordinated long-term varroa tolerance breeding program.	Commonwealth, states and RDCs	AHBIC, AQBBA	Short to long term
4.7.3	Establish a dedicated research and screening program for experimental and novel miticides to identify new control tools, mitigate the impacts of synthetic treatment resistance, and strengthen the long-term sustainability of varroa management in Australia	RDCs, Commonwealth, States, universities		Immediate
4.7.4	Prioritise applied field research into treatment efficacy under Australian conditions, including resistance, reinvasion pressure, continuous brood cycles and northern climate constraints.	RDCs and states	Universities, commercial operators	Immediate
4.7.5	Fund virus surveillance and research on Varroa-vectored disease, colony collapse dynamics and interactions with small hive beetle, AFB, nutrition and pesticide exposure.	AgriFutures and Hort Innovation	Universities, states, AHBIC	Immediate to medium term
4.7.6	Progress domestic queen breeding and genetic improvement for hygienic traits and Varroa tolerance.	Queen breeders and RDCs	Universities, AHBIC	Medium to long term
4.7.7	Investigate agrochemical exposure and bee health during pollination events, particularly in high-density pollination systems.	Hort Innovation and AgriFutures	Crop bodies, researchers	Short term

4.8 Honey market integrity and imported product

Problem: Low honey prices and concerns about imported product integrity reduce beekeeper profitability, weakening the sector's capacity to absorb Varroa costs.

	Action	Proposed lead	Supporting partners	Timing
4.8.1	Fast-track work on imported honey border and post-border testing, authenticity and labelling reforms.	Commonwealth	Food regulators, AHBIC	Immediate to short term
4.8.2	Strengthen residue, provenance and quality assurance systems for Australian honey.	AHBIC and packers	Regulators, state associations	Short term
4.8.3	Assess whether current market settings are undermining domestic pollination capacity by reducing beekeeper viability.	Commonwealth	AHBIC, economists, crop bodies	Short term
4.8.4	Align honey market integrity reforms with pollination security messaging: profitable beekeepers underpin food production.	AHBIC	Crop industries, retailers	Immediate

4.9 Floral resource access, movement and operational logistics

Problem: Beekeepers require reliable access to floral resources to build and recover hives for pollination, but access is constrained by land tenure, drought, fires, development, biosecurity zones and inconsistent movement rules.

	Action	Proposed lead	Supporting partners	Timing
4.9.1	Harmonise movement conditions and risk-based zoning protocols across jurisdictions to support safe business continuity.	States and DAFF	AHBIC, PHA	Immediate
4.9.2	Develop a national floral resource access policy framework, including public land access, forest access and disaster recovery access.	States	AHBIC, DCCEEW, land managers	Short term
4.9.3	Identify critical pre-pollination build-up and post-pollination recovery landscapes for priority protection.	States and researchers	AHBIC, land managers	Short term
4.9.4	Integrate pollinator needs into land-use planning, fire management and environmental management frameworks.	States and DCCEEW	Land managers, AHBIC	Medium term
4.9.5	Provide emergency flexibility for access to alternative sites during drought, fire, flood or biosecurity disruption.	States and land managers	State associations	Immediate to short term

4.10 Governance, accountability and pathway forward

Problem: Many actions are already known, but responsibility, sequencing, funding and accountability remain unclear.

	Action	Proposed lead	Supporting partners	Timing
4.10.1	Convert the technical workshop outputs into an action register with named owners, deliverables, dependencies, funding pathway and timeframe.	AHBIC and Queensland biosecurity department	Workshop participants	Immediate
4.10.2	Use the decision-makers forum to secure commitments from Commonwealth, state and territory governments, RDCs, crop industries and AHBIC.	AHBIC and Queensland biosecurity department	Decision-makers forum participants	Immediate
4.10.3	Establish a time-limited National Pollination Resilience Taskforce or equivalent coordination mechanism.	Commonwealth and states	AHBIC, RDCs, crop industries	Immediate to short term
4.10.4	Align actions with the Australian Pollination Strategy and existing biosecurity structures rather than creating duplicated governance.	Wheen Bee Foundation and AHBIC	Governments, RDCs	Short term
4.10.5	Report progress to industry on a fixed schedule to rebuild trust and demonstrate visible action.	AHBIC and governments	State associations	Immediate
4.10.6	Review the action plan after the next major pollination season and adjust based on evidence.	Agreed governance group	AHBIC, states, crop industries	Short term

5. Proposed Technical Workshop Output

The technical workshop should aim to produce a concise action register for the decision-makers forum. Each proposed action should be tested against the following criteria:

1. Problem addressed
2. Evidence base
3. Action required
4. Lead agency or organisation
5. Supporting partners
6. Funding or regulatory pathway
7. Timeframe
8. Risks and dependencies
9. Decision required at the decision-makers forum

The desired final outcome is a coordinated, practical pathway that stabilises commercial beekeeping capacity, protects pollination-dependent industries and builds a resilient national pollination system under endemic Varroa conditions.

Draft action register template

Action	Lead	Partners	Decision required	Timing	Status

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