Dear Brokers,

Thank you for completing the pollinator availability survey. The Bee Informed Partnership appreciates your continued participation and patience. We hope to continue providing valuable information to the beekeeping community through all of our surveys, including the pollinator availability survey. Attached are the initial results of this year’s pollinator availability survey. This marks the 5th year of the survey. A full multi-year analysis of the results will be forthcoming. If you have any questions or concerns about the survey results, please feel free to contact Jai Holt at (502)554-6088 or jaiholt2@illinois.edu.

Sincerely,

The Bee Informed Partnership Team

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In March and April of 2014, 17 brokers responded to the Tier 6 Pollinator Availability survey. These brokers collectively placed 352,972 colonies. This sample represents about half of the 30-40 estimated brokers in the industry. The number of colonies collectively placed by the brokers who responded to the survey represents 14.1% of the 2.5 million colonies the USDA estimates are managed in the U.S. Of the colonies placed about 18.5% were managed in California exclusively. The average broker placed 20,763 colonies, worked for 13 beekeepers, and 23 almond growers.

The simple average[[1]](#footnote-1) rental price of these placed colonies was $175.47. The lowest rental price for a colony was $145 and the highest price was $201. When the sizes of the brokers’ operations are taken into account, the estimated average price is $181.90[[2]](#footnote-2). This finding suggests that on average, brokers who placed more colonies charged a higher price for those colonies. About 29.4% of the brokers surveyed rewarded beekeepers for providing high grade colonies. Of the brokers who did not include grade premiums in their contracts, several stated that it is too much extra work to provide grade premiums for high grade colonies.

The simple average grade of the colonies placed was 9.41 frames. When operation size was accounted for, the average grade of a placed colony was 10.52 frames. Of the 17 brokers surveyed 14 brokers had all of their colonies graded. However, most often brokers elected to grade their colonies themselves rather than hire an agency to do it for them. The average number of colonies placed per acre was about 2, with brokers placing as few as 0.5 colonies per acre and as many as 3.5.

The brokers surveyed worked for a total of 218 beekeepers. Only 32 of those beekeepers were short (14.8%). Collectively those beekeepers were short 16,448 colonies representing 4.7% of the colonies placed. The brokers estimated that they could have placed about 49,400 more colonies (14.1% of total colonies placed). Only 29.4% of brokers said they could have placed colonies for an additional 100 acre farm. The brokers surveyed collectively placed colonies for 392 almond growers.

**Multi-year Comparison**

Of the 17 brokers surveyed 12 responded in all 5 years. For the multiyear analysis we compared the responses of these 12 brokers over the survey period in order to indirectly measure changes in the supply and demand for honey bee colonies for almond pollination.

The supply of colonies provided by the subsample of beekeepers has leveled off over the period from 2012-2014 (figure 1). However, the demand was projected to increase over the survey period. The USDA projected that almond bearing acreage would expand up to 810,000 acres in 2013. A projected estimate of almond bearing acres for 2014 has not yet been published by the USDA.

As illustrated in figure 2, the simple average colony rental price rose nearly $37 over the 5 year survey period. Between 2013 and 2014, the rental price increased about $20. The average colony grade fluctuated over the survey period. Among the subsample of brokers, the average colony grade was the highest in 2014 at 9.7 frames (figure 3). The number of shortages was lowest in 2014 (figure 4). In the past, fewer shortages have been reported in years that coincided with lower overwintering loses[[3]](#footnote-3) as occurred in 2012.

The overwintering loss results for the winter of 2013-2014 have not been published; however, based on the shortage estimates this year, it is likely the overwinter losses were lower on average this past winter than in the previous winter. Furthermore, with the average reported colony grade being higher in 2014 than in 2013 it appears that the 2013-2014 winter must have been a mild one. Despite the mild winter, the supply of colonies by the brokers decreased since the previous year. It is likely that the sharp increase in price colony rental price between 2013 and 2014 is a result of increased demand for colonies as almond bearing acreage continues to expand.

Figure 1

Figure

Figure 3

Figure

1. The simple average was calculated by averaging the responses across brokers. In other words, the average price responses from each broker were added together and the sum was divided by the number of respondents. [↑](#footnote-ref-1)
2. Operation size is taken into account by calculating a weighted average. Each response is weighted by the number of colonies the broker placed. [↑](#footnote-ref-2)
3. Overwintering loss data was sources from the Bee Informed Partnership Annual Winter Loss reports. [↑](#footnote-ref-3)