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**REPORT FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT AND
THE COUNCIL**

**on the implementation of the measures concerning the apiculture sector of Council
Regulation (EC) No 1234/2007**

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1. INTRODUCTION

Article 184 of Council Regulation (EC) No 1234/2007 establishing a common organisation of agricultural markets and on specific provisions for certain agricultural products (single CMO Regulation)¹ states that a report is to be submitted every three years to the European Parliament and the Council on the implementation of the measures concerning the apiculture sector, as provided for in Articles 105 and following of that Regulation.

This report meets that obligation, covering the years 2009/2010, 2010/2011 and 2011/2012. They correspond to the last year of the previous triennial apiculture programmes (2008-2010) and the first two years of the current programme (2011-2013). This is the fifth report of the Commission on the implementation of national apiculture programmes in the Member States. The fourth report COM(2010)267 final² was adopted in May 2010 and covered the previous three years of implementation of Council Regulation (EC) No 1234/2007.

All Member States notified a national apiculture programme in respect of the periods 2008-2010 and 2011-2013. This shows the strong interest of Member States as well as the needs of European apiculture, a small sector dominated by non-professional beekeepers that faces serious challenges due in particular to bee colony losses, increased production costs and cheap imports.

In 2012, the Commission asked for an external evaluation of the measures for the apiculture sector. This report includes the main outcomes of this evaluation.

2. METHODOLOGY

This report is based on the following sources of information:

- The national apiculture programmes notified by the 27 Member States to the Commission for the periods 2008-2010 and 2011-2013 as provided for under Article 105 of the single CMO Regulation and Article 1 of Commission Regulation (EC) No 917/2004³ on detailed rules to implement Council Regulation (EC) No 1234/2007 on measures improving general conditions for the production and marketing of apiculture products. National programmes include a study on the structure of the apiculture sector as laid down by Articles 1 and 9 of Regulation (EC) No 917/2004.
- The expenditures of the Member States relating to the measures taken under the apiculture programmes as provided for under Article 108 of the single CMO Regulation.

¹ OJ L 299, 16.11.2007, p. 1.

² <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2010:0267:FIN:EN:PDF>.

³ OJ L 163, 30.4.2004, p. 83.

- Data on honey production and international trade extracted from EUROSTAT, COMEXT and FAO databases.
- Contributions from Member States and the European apiculture sector.
- The study carried out by an external consultant on the evaluation of measures for the apiculture sector⁴.

Detailed figures and summary tables on the honey market and on the apiculture programmes are available on the Commission website⁵.

3. MARKET SITUATION OF THE APICULTURE SECTOR

3.1. The world market

3.1.1. Production

In 2011, honey world production accounted for 1 636 000 tonnes according to the FAO. The production has been increasing slowly but regularly in the last ten years with two exceptions in 2007 and 2009.

China is the first honey producer with 446 000 tonnes accounting for 27.3 % of the world total, followed by the EU with 217 000 tonnes (13.3 %). Other main honey producers are Turkey with a steady output increase, Ukraine and the United States of America. The share of South and Central America has decreased due in particular to a significant drop of production in Argentina since 2005.

3.1.2. Trade

Around one fifth of honey world production is traded on the international market according to data from the FAO and COMEXT.

World exports have been oscillating between 300 000 and 360 000 tonnes for several years; in 2011, they were around 335 000 tonnes. China has increased its exports and has been the world's biggest exporter for the last four years with approximately 100 000 tonnes in 2011. Argentina is the second exporter but the quantities exported have been decreasing and were approximately 72 000 tonnes in 2011.

EU and the US are the two main importers of honey.

3.2. EU market

3.2.1. Production

According to EUROSTAT, honey production in the EU was 217 366 tonnes in 2011. EU production has increased slightly in the last ten years (+6% since 2010) with negative and positive annual variations depending on weather conditions.

Honey sale price depends on the type and the quality of honey and the commercial channel; table honey (85% of honey sold in the EU) reaches higher prices than industrial honey and mono-floral honeys fetch higher prices.

As for the commercial channel, beekeepers receive the highest price when selling directly to consumers; the second best option is selling conditioned honey to retailers and in the third place come the sales to packers and distributors.

⁴ http://ec.europa.eu/agriculture/evaluation/market-and-income-reports/index_en.htm.

⁵ http://wcmcom-ec-europa-eu-wip.wcm3vue.cec.eu.int:8080/agriculture/honey/index_en.htm

Most of EU honey is sold directly to consumers by beekeepers; this is related also to the large non-professional nature of beekeeping in most of Member States. However there is a certain disparity of commercial channels in the EU; for example, in Spain, a preponderant part of the production is sold to the processing/packing sector in line with the higher professionalization of the sector there.

3.2.2. *Trade*

The EU is a net importer of honey as the EU production covers only 61.6 % of its consumption. The level of consumption has been quite stable over the years with an average of around 0.70 kg/head.

The three main honey producers in the Union are Spain, Germany and Romania with a respective output in 2011 of 34 000, 25 831 and 24 127 tonnes. Other important producing Member States are Hungary (19 800 tonnes), France (16 000 tonnes), Greece (14 300 tonnes), Poland (13 369 tonnes).

EU imports of honey range between 120 000 and 150 000 tonnes since 2000. In 2012, the European Union imported 149 248 tonnes of honey, mainly from China with 63 961 tonnes (43 % of the total) followed by Argentina (22 344 tonnes). The share of Chinese imports has increased constantly since 2008 due to very low prices while, in parallel, the share of Argentinian imports decreased. Mexico is the third supplier with 21 249 tonnes and Ukraine the fourth one with 8 949 tonnes.

Germany is the main importing Member State with more than one third of the total in 2012.

Average honey import unit value in the EU increased since 2010 and attained 2.08 €/kg in 2012. Chinese honey has the lowest unit value at 1.44 €/kg. Average honey import unit values for other EU main suppliers are: 1.83 €/kg for Ukraine, 2.23 €/kg for Argentina and 2.44 €/kg for Mexico.

Exports from the Union have increased since 2010 to reach 14 275 tonnes in 2012 (+ 33%). However, they are still limited to less than 7 % of the production. The main destinations of EU exports have not changed since 2010: Switzerland, Japan, Saudi Arabia and the United States of America.

Germany and Spain are the main EU exporters; these two Member States account together for more than half of the Union exports.

Average honey export unit value from the Union constantly increased since 2010 and reached 5.14 €/kg in 2012. As a consequence, the gap between import and export unit values has grown substantially broader and is approximately of 3 €/kg. This value differential can be explained by the fact that EU exports mainly consist of high quality packed honey while imports include large volumes of cheaper honey in bigger containers used for blending and the food industry.

4. IMPLEMENTATION OF NATIONAL APICULTURE PROGRAMMES

4.1. Objectives and eligible measures

The overall goal of the programme is to improve the general conditions for the production and marketing of apiculture products in the Union.

Six measures with specific objectives are eligible for aid and can be included in the national apiculture programmes of the Member States; they are listed in Article 106 of the single CMO Regulation and have not changed since the last report.

Technical assistance is designed to enhance the efficiency of production and marketing by introducing better techniques. It includes the organisation of basic courses for new entrants and continuing education for experienced beekeepers and those responsible for groupings or cooperatives; training courses relate in particular to areas such as breeding and disease prevention, collection and packaging, storage and transport of honey and marketing. Teaching apiaries and the network of beekeeping consultants/technicians allow for the dissemination of practical technical knowledge. The measure can also be used to support the modernisation of the sector through the purchase of extraction equipment by beekeepers.

The aim of **varroasis prevention** is to control the infestation of hives by this endemic parasite. Varroasis is caused by a mite that is weakening the bees' immune system and increases bees' secondary infections by viruses. Varroasis is severely diminishing the honey yield in the EU, leading to the loss of bee colonies if not treated. As varroasis cannot be completely eradicated, the only way to avoid its consequences is to treat hives with approved methods and products. Some financial contribution is necessary to help producers to afford the expenditure incurred in treating hives appropriately (products, equipment such as covering meshes).

Aid for the **rationalisation of transhumance** is intended to assist with managing the movement of hives in the Union and with providing locations for beekeepers during the flowering season. Transhumance management can be facilitated by such measures as identification of hives and frames, a transhumance register, investment in material facilitating transhumance and mapping of honey varieties. In several Member States, transhumance is crucial to meet the nutritional needs of bees and ensure pollination of plants.

Support measures for carrying out **analyses of honey** are intended to improve the marketing of honey. Financing of analyses of honey allow beekeepers to ensure that honey put on the market meets the physico-chemical characteristics laid down in Council Directive 2001/110/EC relating to honey⁶; analyses on the botanical origin of honey provide beekeepers with precise knowledge of the honey harvested, enabling them to get a higher price for their product. The financial support for honey analysis is essential for making this service accessible to a large number of beekeepers.

The **restocking of hives** makes it possible to compensate for losses of bees, and therefore avoid losses of production; this can include funding activities to promote queens' production or purchasing of bee colonies.

The opportunity provided by the Regulation for including specific **applied research** projects for improving honey quality in the honey programmes, and dissemination of the results of such projects, can help to increase producers' knowledge on specific practices of beekeeping.

4.2. **Census of beehives and beekeepers**

In accordance with Articles 1 and 9 of Regulation (EC) No 917/2004, Member States provided information on the structure of the apiculture sector in the context of the 2011-2013 programmes.

According to these, the total number of beekeepers in the Union in 2010 was 506 038, of whom only 5.2% (26 318) were considered to be professional beekeepers (over 150 hives).

⁶ OJ L 10, 12.1.2002, p. 47.

In 2010, the total number of hives in the EU was of some 14 million (13 985 091), around 6 million (5 659 551) of which belong to professional beekeepers who therefore have 40 % of hives. It should be noted that since there is no legal obligation at EU level to register beehives, the collection of data on the total number of hives is not harmonized between Member States and can lack precision. Although the percentages of professional beekeepers and the number of hives they manage have increased since 2007 (33% of hives), the sector still largely consists of non-professional beekeepers. The professionalization rate is generally low in the EU but can vary greatly between Member States; for instance, in Germany, more than 99% of beekeepers are non-professional while in Spain 23% of beekeepers are professional.

The number of hives in the EU has increased by 3% (382 372) in 2010 compared to the 2007 census. According to beekeepers, this increase is necessary in order to compensate for bee mortality. However, it involved also an increase of honey production equivalent to 6% in the same period.

The five Member States with the highest number of hives are: Spain (19.3%), Greece (11.8%), France (10.5%), Romania (10%) and Italy (8.8%). However, countries with the higher number of hives are not always countries with the higher honey production. This can be explained by environmental differences (climate, nectar quantities, densities of bee colonies, etc.) as well as by the lack of a harmonized method at EU level to monitor the number of hives, which leads to dramatic differences in yield per hive between Member States (between 9 to 51 kg in 2010 in the EU). As a result, Germany has a lower number of hives (5.6%) than Greece, Italy, France and Romania but produces more honey than any of these countries due to higher yields (up to 37.2 kg per hive in 2011). Hungary has also high average yields per hive (27.4 kg in 2010) and is therefore the fourth EU producer in the EU although it only has 7.1% of hives.

4.3. Allocation of expenditure

4.3.1. Budget per Member State

In line with Article 108 of the single CMO Regulation, the Union provides part-financing for the apiculture programmes equivalent to 50% of the expenditure borne by Member States.

It should be noted that the Union annual funds dedicated to the apiculture sector have increased since 2007 in order to take into account of the rising numbers of bee hives and the growing needs of the apiculture sector. In 2011, the budget rose to € 32 million per year.

Member States notify their national apiculture programmes to the Commission before 15 April once every three years as required by Article 2 of Regulation (EC) No 917/2004 (the submission in 2010 related to the programmes covering years 2011, 2012 and 2013).

On the basis of the Member States' expenditure forecasts laid down in their national apiculture programmes, the Union funds available (€ 32 million per year for the period 2011-2013) are distributed according to each Member State's share in the total number of hives in the Union but allocated funds cannot be higher than 50% of programmed expenditure for each Member State. When half of expenditure in the national programme is lower than the amount corresponding to the number of hives, the remaining available funds are redistributed among Member States for which the

expected expenditure exceeds their proportional share of the budget (in accordance to Art. 3 of Regulation (EC) No 917/2004).

The total numbers of hives in each Member State and in the Union are updated and published every three years in Annex I of Regulation (EC) No 917/2004.

In 2011, six Member States (Bulgaria, Denmark, Germany, Greece, Finland and Sweden) forecasted expenditures below their respective budget in function of the number of hives. The corresponding amount of EU funds was redistributed among the rest of Member States.

In 2011, the five Member States with the largest number of hives got a combined allocation for 55 % of the available EU budget. The Member States with the largest number of hives are therefore the largest users of the programme.

4.3.2. *Execution of the budget*

According to the figures communicated by the Member States on the implementation of the budget per type of measure, overall usage rates in the 27 Member States are very high (93% in 2010, 89% in 2011 and 89% in 2012). The decrease in the execution rate from 2010 to 2011 can be explained by the fact that the budget allocated to apiculture programme increased from 26.3 million to 32 million between these 2 years. In general, the rate tends to be lower the first year of the programme and increases towards year three.

In 2010 and 2011, the greatest beneficiaries (Spain (93%, 84%), Greece (97%, 92%), France (90%, 88%), Italy (96%, 92%), and Romania (100%, 85%) were very effective in their use of the budgets. This was also the case in 2012 (Greece (97%), France (92%), Italy (93%), and Romania (98%) with the exception of Spain where only 69% of budget was used.

4.4. **Expenses incurred by type of action per Member State**

The analysis of expenses incurred is based on the figures provided by Member States each year as required by Article 6(2) of Regulation (EC) No 917/2004. For the period 2010-2012, the two more widely supported measures were control of varroasis and technical assistance. Expenses for these 2 measures were systematically the largest and have been relatively stable over the successive programmes, accounting on average for 27-30% for the control of varroasis and 24-28% for technical assistance.

More in particular, **varroasis control measures** have been used by all Member States in 2010; this reflects the fact that varroasis is endemic in the Union and is perceived as the main threat for bees' survival according to the answers to a questionnaire launched by the EU Reference Laboratory for Bee Health⁷. It is also due to the relative high cost of treatments against varroa, estimated to represent between 10 to 20% of production costs according to beekeepers. Member States making the largest use of this measure were Spain, Hungary and Poland. However, it should be noted that Greece ceased to use this measure in 2011 and 2012 due to the inflation of treatment costs, the resistance of varroa to treatments, the risk of residues' presence in apiculture products and the hot climatic conditions which are favourable to the development of brood all year around and the persistence of varroa.

⁷ http://ec.europa.eu/food/animal/liveanimals/bees/eu_ref_lab_bee_health_en.htm.

Technical assistance measures are used by the vast majority of Member States. Considering the number of non-professional beekeepers and the changing conditions of the sector, there is a need for continuous action focused on dissemination of information. Both the beekeeping sector and Member States consider the technical assistance measures as having highly beneficial effects on production. The main users of this measure in 2011 and 2012 were Italy, Greece, France, Germany, Czech Republic, Poland and Spain. It should be noted that there were changes in the allocation per Member State of expenses for technical assistance between the two apiculture programmes: in 2010, the Netherlands, Bulgaria and Romania did not use this measure at all, while in 2011 and 2012 Bulgaria and Romania started using it. Poland increased six times its expenses for technical assistance between 2010 and 2011-2012. Spain almost doubled its expenses between 2010 and 2011-2012.

Measures designed to ensure **rationalisation of transhumance** continues to be the third most common supported measures, accounting for 16-20% of expenditure. Mostly Southern European countries such as Greece, Spain and Romania with diversified vegetation and a long period of flowering are using this measure. Other Member States such as Germany supports transhumance because of its importance for pollination.

Hive restocking measures came in fourth place. The use of this measure represented 19% of expenditure in 2010 and decreased to 16% in 2012. Romania, Bulgaria and Poland are the main users. Beekeeping organisations, which are involved in the preparation of the programmes, are very interested in these measures to offset the loss of bee colonies and rising prices of swarms. Nevertheless the beekeeping sector feels that supporting the restocking of hives is, to a certain extent, only a short-term solution and that the causes of bee mortality should be further researched and acted upon.

Measures on **applied research** came in the fifth place (4-6 % expenditure). France continues to be the Member State allocating the largest budget to applied research, with approximately 1.4 million in 2012; this represents more than half of the total sum allocated to this measure in the Union. For example, applied research measures were used in France to carry out a study on exposure of honey bees to a neonicotinoid systemic pesticide⁸.

Finally expenses for **honey analysis** are the least used by the Member States and decreased. In 2010, they represented 6% of the expenses then they decreased to 4% in 2011 and to 3% in 2012. Spain, which was one of the countries with the highest budget for honey analyses between 2007 and 2009, decreased its expenses in 2010 and again in 2011 and 2012. Poland also reduced its expenses between 2010 and 2011 while Bulgaria increased its expenses in 2011 and 2012 compared to 2010. These variations could be due to the fact that once a network of laboratories is established, expenses are less important. It should be noted that the support of laboratories' analyses is particularly appreciated by honey packers and distributors as it enables beekeepers to internalise this cost.

⁸ "A common pesticide decreases foraging success and survival in honey bees" in Scienceexpress/<http://sciencemag.org/content/early/recent/29March2012/> Page 1/10.1126/science.1215039.

5. EVALUATION OF MEASURES FOR THE APICULTURE SECTOR

In 2012, the Commission charged an external consultant to perform an evaluation of measures for the apiculture sector.

The study evaluated:

- To what extent the six measures of the apiculture programmes affected the production, marketing and trade of honey as well as the keeping and trade of live bees.
- To what extent the measures contributed to support economic activity and the income of professional beekeepers.
- To what extent the measures contributed to price stability for honey.

The study was finalized in July 2013.

The study concluded that the national apiculture programmes have contributed to stabilise honey production levels in the EU in a context of rising production costs, threats to bee survival and fierce international competition by honey imports from third countries.

The measures contributed to curbing the surge in production costs (in particular for varroa treatments and restocking of hives) and therefore limited the impact of these costs on the income of beekeepers. The six measures are complementary to each other; conclusions on the effect of each individual measure should be interpreted carefully and should take into account the synergies existing between the measures.

Beekeeping activity was rendered more productive by inducing structural improvements into the sector through technical assistance, rationalisation of transhumance, control of varroasis, modernisation and mechanisation of beekeeping activity, trainings and dissemination of information.

The measures allowed for the support of the production of EU high-quality of honey as well as ensure that lower-end production remains competitive. The high-quality and added value of the honey produced in the EU allows for the wide gap between average export unit value of EU honey and the average import unit value of honey from third countries.

Furthermore the measures have had an indirect positive impact on both rural development and the environment. By reducing costs, inducing structural improvements and supporting the income of beekeepers the measures have helped to maintain the beekeeping activity in rural areas which is essential for pollination and hence for agriculture. The measures also encouraged more sustainable beekeeping practices particularly for the control of varroasis.

Finally, the study highlighted that the beekeeping sector, the honey industry and Member States all agree to consider that the national apiculture programmes are very useful to support the sector.

Nevertheless the study concluded that further progress could be made by optimising the use of the existing measures in order to promote honey, encourage further the cooperation between beekeepers, improve the dissemination of information on applied research projects and diversify the sources of income of beekeepers through the development of high value apiculture products such as royal jelly, pollen and propolis.

In view of the sector's needs and the national disparities among the Member States, the contractor recommended also a clearer direction from the Union on apiculture programmes since the choice of the concrete measures is currently made at national or even regional level. Synergies between the Union research programmes and national applied research should also be found to ensure a better link between fundamental and applied research and also avoid potential overlaps.

6. SUGGESTIONS BY MEMBER STATES AND THE SECTOR

In October 2012, the Commission required Member States and the sector representatives to provide their views on the apiculture programmes for the purpose of preparing this report.

Overall, as shown by the evaluation study, Member States expressed their satisfaction with the way the programmes are run and pleaded for their continuation as they consider these measures a great help for beekeeping and honey production.

The following suggestions for adjusting the measures were expressed by Member States:

- Germany and Luxemburg suggested aligning the apiculture year with the calendar year. Currently, the annual exercises of the apiculture programmes are established from 16 October each year to 15 October of the following year (Article 2(2) of Regulation (EC) No 917/2004) while the measures eligible for co-financing must have been implemented by 31 August of the year in question (Article 2(3) of Regulation (EC) No 917/2004); it is therefore difficult to finance actions implemented during the month of September and first half of October. For the 2014-2016 apiculture programmes, the Commission intends to address this issue by proposing to amend the dates of the implementation of the measures in Regulation (EC) No 917/2004 in order to ensure that apiculture measures can be implemented all year round.

- Germany asked for the simplification of the administration and control measures as the control effort required seems disproportionate. Member States are responsible to monitor and assess the programmes. Regulation (EC) No 917/2004 obliges Member States to notify these measures according to a precise timeframe but leaves a lot of flexibility to the Member States to implement the controls in accordance with the general principle of subsidiarity and risk assessment. For the apiculture programmes 2014-2016, the notifications to the Commission are simplified and entered directly through the Information System for Agricultural Market Management and Monitoring.

- Germany suggested supporting additional measures relating to beekeeping, improving bee health, controlling the damage resulting from varroasis, honey marketing and honey flora. All these measures can already be supported to a certain extent by the current apiculture programmes. Additional specific measures to improve bee health⁹ are funded by the EU outside the apiculture programmes.

- Regarding technical assistance, Germany asked for a clearer description of the eligibility for support of equipment for beekeepers, e.g. in the form of a Commission list of goods eligible for support. The Commission considers that a fixed list of goods would remove some of the flexibility necessary to take into account the variability of

⁹ http://ec.europa.eu/food/animal/liveanimals/bees/bee_health_en.htm.

the structures of the sector across Member. Moreover, investments by beekeepers can be financed already within rural development programmes containing measures for modernisation and innovation of agricultural holdings.

Finally, Lithuania suggested providing support to enable small beekeepers to renew their equipment for extraction of honey and making combs. Such support can already be provided under the measure for technical assistance.

The Commission did not receive any written comments from the sector following its request in October 2012. However, the external evaluator consulted the sector comprehensively via case studies carried out in four Member States¹⁰, interviews and web-based surveys, and concluded that the support provided by the measures was highly appreciated by the beekeepers and beekeepers' associations as it allowed to reduce production costs in a sector under pressure. However, beekeepers and their associations highlighted the need to develop more effective treatments to fight varroa and to curb their costs. They also noted that although the measure for restocking of hives allow to compensate partly for bee colonies" loss, this is only a short term solution and the causes of bee mortality should be researched and acted upon.

7. CONCLUSION

The national apiculture programmes aim to improve the production and marketing of honey in the European Union. In all Member States, they provide direct support to apiculture, one small sector in terms of output but essential for agriculture through pollination.

Both from the point of view of the Member States and the operators, the national apiculture programmes have been beneficial for the beekeeping sector. The measures allow for the maintenance of the production of high quality honey in the EU despite a difficult context with rising production costs, threats to bee survival and fierce international competition by cheap honey imports from third countries.

In light of the information presented in this report and the outcomes of the evaluation of the apiculture measures, the Commission does not envisage to modify the list of measures eligible for apiculture in Council Regulation (EC) No 1234/2007. However, the Commission will propose to amend the implementing Regulation (EC) No 917/2004 in order to ensure that apiculture measures can be applied and funded all year round and to improve their management.

In addition, the Commission will work towards a better coordination between the national applied research projects and the Union research projects in order to optimize the use of their results and to improve their dissemination to the beekeeping sector.

Finally, the Commission will seek to improve further the efficiency of the existing measures by looking for potential synergies between the apiculture measures and the rural development programmes. This could involve rural development measures such as supporting young beekeepers' installation and modernisation of holdings as well as the use of agro-environmental measures to increase the availability of melliferous plants for honey bees.

¹⁰ Spain, Germany, Hungary and Greece.