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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 Regulation
(EU) No 1308/2013 of the European Parliament and of the Council establishing a
common organisation of the markets in agricultural products**

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1. INTRODUCTION

The European Union (EU) apiculture sector is small compared to other agricultural sectors but provides part of pollination services to EU agriculture.

EU beekeepers have to face many challenges in order to maintain their beehives and honey production. Increasing costs, strong competition with cheap honey imports from third countries, bees' colonies losses, diseases, beehives' invaders combined with a deteriorating forage environment are putting pressure on the sector.

Several tools are available in the Common Agriculture Policy (CAP) to support the apiculture sector and mitigate the negative impact that some agricultural activities might have on managed pollinators.

The EU has been supporting directly the beekeeping sector since 1997¹. Successive Market Regulations gave the possibility for Member States to draw up national programmes for their apiculture sector. The objective of these programmes is to improve general conditions for production and marketing apiculture products, which include not only honey but also royal jelly, pollen, propolis or beeswax. The programmes are co-financed by the European Union at a 50% rate and last for three years.

Article 225 (a) of Council Regulation (EU) No 1308/2013 of the European Parliament and of the Council establishing a common organisation of the markets in agricultural products² states that the Commission shall present a report to the European Parliament and the Council every three years and for the first time by 21 December 2016 on the implementation of the measures concerning the apiculture sector as set out in Articles 55, 56 and 57, including on the latest developments on beehive identification systems.

This report meets that obligation, covering apiculture years 2013, 2014 and 2015³. As national apiculture programmes run for three years, these apiculture years correspond to the last year of the previous triennial apiculture programmes (2011-2013) and the first two years of the current programme (2014-2016). This is the sixth report of the Commission to the European Parliament and the Council on the implementation of the apiculture programmes⁴.

All Member States notified a national apiculture programme for the periods 2011-2013 and 2014-2016. This shows the strong interest of Member States and the needs of the sector.

During the three apiculture years covered by this report, Council Regulation (EC) No 1234/2007 establishing a common organisation of agricultural markets and on specific provisions for certain agricultural products (Single CMO Regulation)⁵ was still in force; therefore the changes introduced regarding the apiculture sector by the reform of the CAP in

¹ Council Regulation (EC) No 1221/97 of 25 June 1997 laying down rules for the application of measures to improve the production and marketing of honey, OJ L 173, 1.7.97, p. 1.

² OJ L 347, 20.12.2013, p. 671.

³ Apiculture years 2013, 2014, and 2015 correspond respectively to the 12 months period starting 1.9.2012 ending 31.8.2013, starting 1.9.2013 ending 31.8.2014, and starting 1.9.2014 ending 31.8.2015.

⁴ The previous report was published on 16.8.2013, COM(2013) 593 final.

⁵ OJ L 299, 16.11.2007, p. 1.

2013 were not yet implemented. Nevertheless, this report presents the main legislative changes introduced by the reform of the CAP as well as the latest information available regarding the developments on beehive identification systems.

2. METHODOLOGY

This report is based on the following sources of information:

- National apiculture programmes notified to the Commission by the Member States for the periods 2011-2013, 2014-2016 and 2017-2019. Each national apiculture programme must include a study carried out by the Member State on the production and marketing structure of the beekeeping sector in its territory;
- Expenditures of the Member States relating to the measures taken under their national apiculture programmes notified to the Commission⁶;
- Data on honey production and international trade from EUROSTAT, COMEXT, and FAO.

Detailed figures and summary tables on the honey market and on national apiculture programmes are available on the Commission website⁷.

3. OVERVIEW OF THE EU APICULTURE SECTOR

3.1 Production and prices

With a production of around 250 000 tonnes/year the **EU is the second world producer of honey after China.**

The EU does not produce enough honey to cover its own consumption. In 2015, the rate of self-sufficiency⁸ was around 60%.

Member States with the largest honey production (RO, ES, HU, DE, IT) are located mainly in the Southern part of the Union where climatic conditions are more favourable to beekeeping.

Overall, EU honey production has been increasing slowly with annual variations depending on climatic conditions. However, keeping this level of production may be becoming harder for beekeepers due to the challenges they face in terms of bees' health and habitat loss as a result of agricultural intensification. Conditions of production are deteriorating, costs of production are increasing and growing imports of cheaper honey from third countries create a situation of increasing competition.

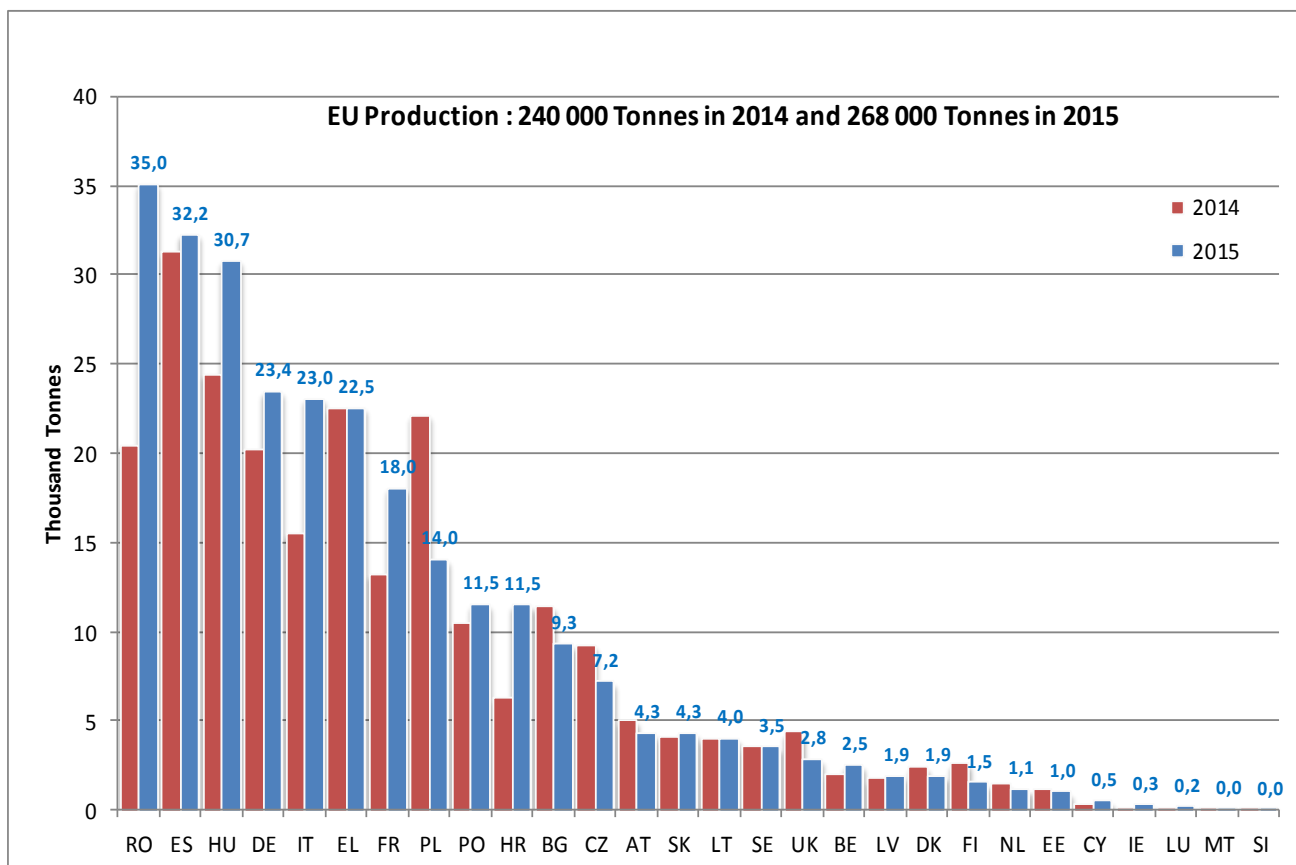
Prices of honey vary greatly according to quality and point of sale. For multi-floral honey, the range of prices go from 2.54€/kg in Poland for multi-floral honey sold in bulk at wholesalers to 15.18€/kg for honey sold at the site of production in the United Kingdom.

Figure 1: EU honey production in 2014 and 2015

⁶ As notified by the Member States to the Commission in accordance with Article 6 of Commission Regulation (EC) No 917/2004 of 29 April 2004 on detailed rules to implement Council Regulation (EC) No 797/2004 on measures improving general conditions for the production and marketing of apiculture products, OJ L 163, 30.4.2004, p. 83.

⁷ http://ec.europa.eu/agriculture/honey/index_en.htm

⁸ Self-sufficiency rate = The ratio of domestic honey production as ratio of total consumption
= EU production/year divided by (EU imports/year+ EU production/year – EU exports/year)



Source: Member States' studies notified in the 2017-2019 national apiculture programmes

3.2 Trade

Imports

The **EU** is the **first world importer** of honey. EU imports have been increasing year after year.

In 2015, the EU imported around 200 000 tonnes of honey, representing in volume around 75% of EU total production. **Half of these imports came from China** (around 100 000 tonnes). The other two main suppliers were Mexico and Ukraine. Honey imported from third countries is much cheaper than honey produced in the EU. In 2015, the average import unit price for Chinese honey was 1.64€/kg while the average EU price of multi-floral honey sold in bulk at wholesalers was 3.78€/kg. Due to higher production costs EU producers can hardly compete with imported honey.

Exports

EU Exports are negligible compared to imports.

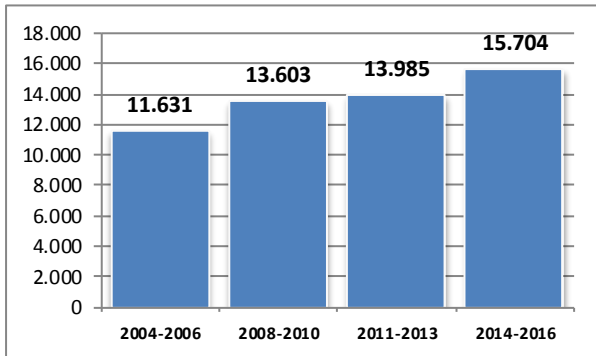
In 2015, the EU exported around 20 000 tonnes of honey, representing in volume around 8% of EU total production. The EU exports mainly to markets looking for high quality honey in Switzerland, Saudi Arabia, Japan, the USA and Canada. In 2015, the average export unit price was 5.77€/kg of honey.

3.3 Census of beehives

According to data provided in the 2014-2016 programmes, there were around 16 millions beehives in the EU. The five Member States with the largest numbers of beehives are mainly located in the South of the EU: Spain, France, Greece, Romania and Italy.

The Commission does not have new data on the number of beehives compared to the last report. Updated figures will not be available before 2017.

Figure 2: Evolution of the number of beehives in the EU

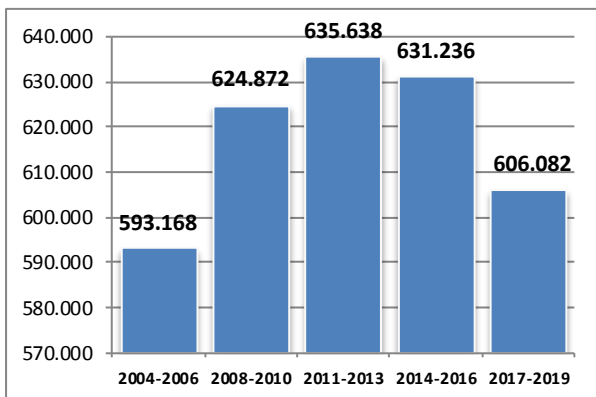


Source: Member State studies notified in national apiculture programmes

3.4 Census of beekeepers

According to data provided in the 2017-2019 programmes, there were around 600 000 beekeepers in the Union. **The number of EU beekeepers has been decreasing.** Many beekeepers who leave the sector for reasons of age are not replaced by newcomers.

Figure 3: Evolution of the number of beekeepers in the EU



Source: Member States' studies notified in the national apiculture programmes

The situation differs greatly across Member States. Germany is one of the few Member States who managed to stop the decline in the number of beekeepers. The German Beekeepers' Association prioritized a recruitment strategy of beekeepers and offered beginners' courses which led to an increase in the number of active beekeepers. Part of these actions were funded by the measure "technical assistance" of the programmes.

In 2015, 96% of European beekeepers managed less than 150 beehives, the threshold until which an apiary is regarded as "non-professional"; only 4% of beekeepers in the EU had more than 150 beehives and could be classified as "professional" beekeepers. This threshold is, however, contested by some beekeeping associations that consider 40 hives as more appropriate.

A large majority of EU beekeepers (72%) are members of Beekeeping Associations.

4. IMPLEMENTATION OF NATIONAL APICULTURE PROGRAMMES

4.1 Legal basis

During the 2013, 2014 and 2015 apiculture years that are covered by this report, Council Regulation (EC) No 1234/2007 was still in force; **therefore the changes introduced regarding the apiculture sector by the reform of the CAP in 2013 were not yet implemented.**

The provisions of Articles 55 to 57 of the new Regulation (EU) No 1308/2013 replace and repeal the provisions of Articles 105 to 110 of Regulation (EC) No 1234/2007. However, Article 231 of Regulation (EU) No 1308/2013 states that all multiannual programmes adopted before 1 January 2014 shall continue to be governed by the relevant provisions of Regulation (EC) No 1234/2007 until those programmes come to an end. The Legislator introduced this transitional provision to ensure continuity in on-going programmes. As the 2011-2013 and 2014-2016 apiculture programmes were adopted before 1 January 2014, they were still governed by the provisions of Regulation (EC) No 1234/2007 and Commission Regulation (EC) No 917/2004 on detailed rules to implement Council Regulation (EC) No 797/2004 on measures improving general conditions for the production and marketing of apiculture products⁹.

4.2 Objectives and Measures

The objective of the programmes is to improve the general conditions for production and marketing apiculture products in the Union.

Six measures are eligible for aid and can be included in national apiculture programmes.

When drawing their programmes, Member States consult their beekeeping organisations and choose among a list of eligible measures the actions that they consider the most relevant. For example, for the 2014 and 2015 apiculture years, The Netherlands chose to implement only one measure: applied research.

The six measures eligible have not changed since the latest report of the Commission in 2013 and are the following:

⁹ OJ L 163, 30.4.2004, p. 83.

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

Aid for the **rationalisation of transhumance** is intended to assist with managing the movement of beehives in the Union and with providing locations for beekeepers during the flowering season. Transhumance management can be facilitated by such measures as identification of beehives and frames, a transhumance register, investment in material facilitating transhumance and mapping of flower 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 **analysis of honey** are intended to improve the marketing of honey. Analysis 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 honey¹⁰; analysis on the botanical origin of honey provides beekeepers with precise knowledge of harvested honey, 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 beehives** makes it possible to compensate partially for losses of bees, and therefore avoid drops of production; this can include funding activities to promote queens' production or purchasing of bee colonies.

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

¹⁰ OJ L 10, 12.1.2002, p. 47.

4.3 Union Budget for national apiculture programmes and usage rate

Union funds dedicated to the apiculture sector are relatively small but increased every three years in order to take into account the growing needs of the sector, the good uptake of the programmes and the successive enlargements of the Union. For the 2017-2019 apiculture programmes, Union funds available will be increased to EUR 36 million per apiculture year.

Table 1: Union funds available for national apiculture programmes

Union funds available <u>per apiculture year</u>	2013 apiculture year 2011-2013 programmes	2014 apiculture year 2014-2016 programmes	2015 apiculture year 2014-2016 programmes
EUR	32 000 000	33 100 000	33 100 000
Amount of Union funds used by Member States in EUR	29 160 781	30 430 265	30 874 274
Usage rate	91%	92%	93%

All Member States¹¹ notified a national apiculture programme for the periods 2011-2013 and 2014-2016.

The Union contribution to the apiculture programmes corresponds to 50% of the expenditure borne by the Member States. Concretely, it means that for the 2013 apiculture year EUR 64 million in total were available for the apiculture sector: EUR 32 million from the Union budget and EUR 32 million from the Member States' national budget. For the 2014 and 2015 apiculture years, EUR 66.2 million in total were available for each year: EUR 33.1 million from the Union budget and EUR 33.1 million from the Member States' national budget.

As in previous years, Member States used almost all available Union funds for these programmes. The EU average usage rate is excellent : it was respectively 91%, 92% and 93% for the 2013, 2014 and 2015 apiculture years.

4.4 Allocation of the Union contribution per Member State

The key factor for the allocation of the Union contribution per Member State is the number of beehives on its territory.

On the basis of Member States' expenditure forecasts notified in their programmes, Union funds are distributed in accordance with each Member State's share in the total number of beehives in the Union.

¹¹ 27 Member States had a national apiculture programme in place for 2011-2013. After Croatia joined the European Union on 1 July 2013, 28 Member States had a national apiculture programme in place for 2014-2016.

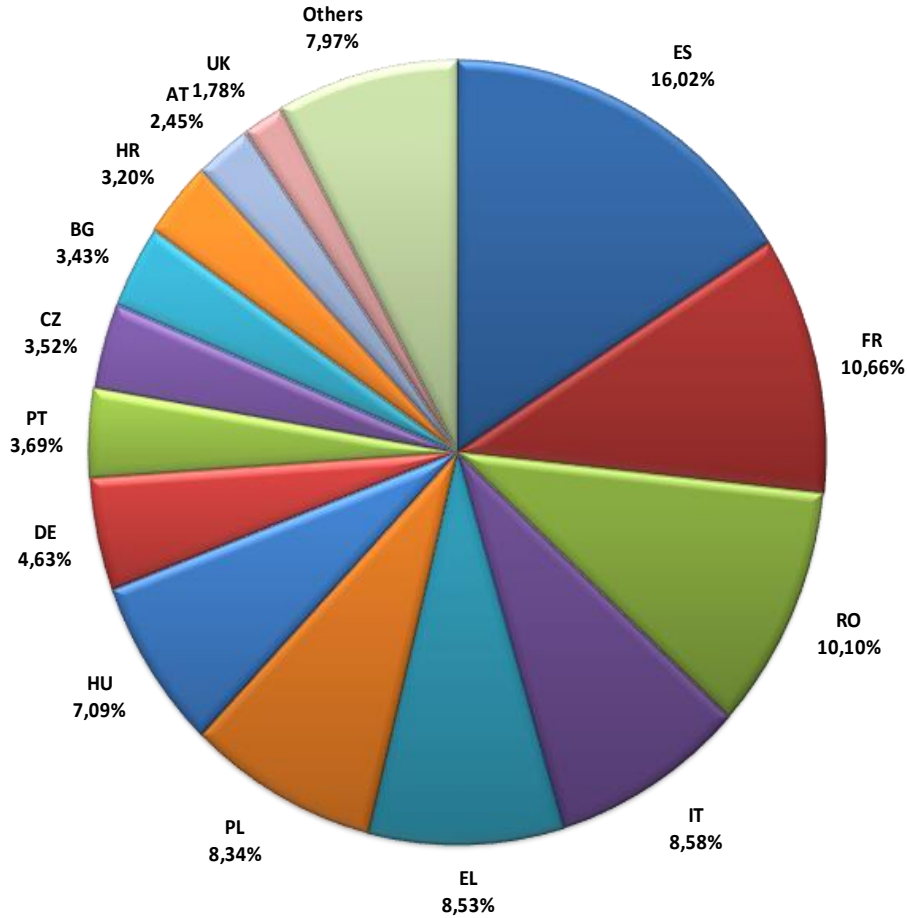
Member States communicate the number of beehives present on their territory at the time of the submission of the apiculture programmes to the Commission. The number and breakdown of beehives per Member State and in the Union is published in a Commission Implementing Regulation amending Annex I to Regulation (EC) No 917/2004¹².

The number of beehives in each Member State, calculated as a percentage of the total number of beehives in the EU, determines the theoretical maximum percentage of the budget to which each Member State is entitled. In case a Member State forecasts less expenditure than the maximum budget to which it is entitled, the amounts not requested by this Member State are redistributed between the others.

As a result, Member States with the largest number of beehives are those getting the largest share of Union funds. For 2013, 2014 and 2015 apiculture years, Spain, the Member State with the largest number of beehives in the Union was allocated the largest share of Union funds. The five Member States with the largest number of beehives (Spain, France, Greece, Romania and Italy) were allocated around half of total EU funds for the 2013, 2014 and 2015 apiculture years.

¹² For the 2014-2016 programmes, see Commission Implementing Regulation (EU) No 768/2013 amending Regulation (EC) 914/2004 on detailed rules to implement Council Regulation (EC) No 797/2004 on measures improving general conditions for the production and marketing of apiculture products, OJ L 214, 9.8.2013, p. 7.
For the 2011-2013 programmes, see Commission Regulation (EU) No 726/2010 of 12 August 2010 amending Regulation (EC) No 917/2004 on detailed rules to implement Council Regulation (EC) No 797/2004 on measures improving general conditions for the production and marketing of apiculture products, OJ L 213, 13.8.2010, p. 29.

Figure 4: Allocation of the Union contribution per Member State for the 2015 apiculture year



4.5 Expenditure incurred per type of measures

At the end of each apiculture year, in line with Article 6 of Commission Regulation (EC) No 917/2004, Member States notify to the Commission their expenditure per type of measures.

The breakdown of expenditure per type of measures for the 2013, 2014 and 2015 apiculture years has basically not changed compared to the last report of the Commission.

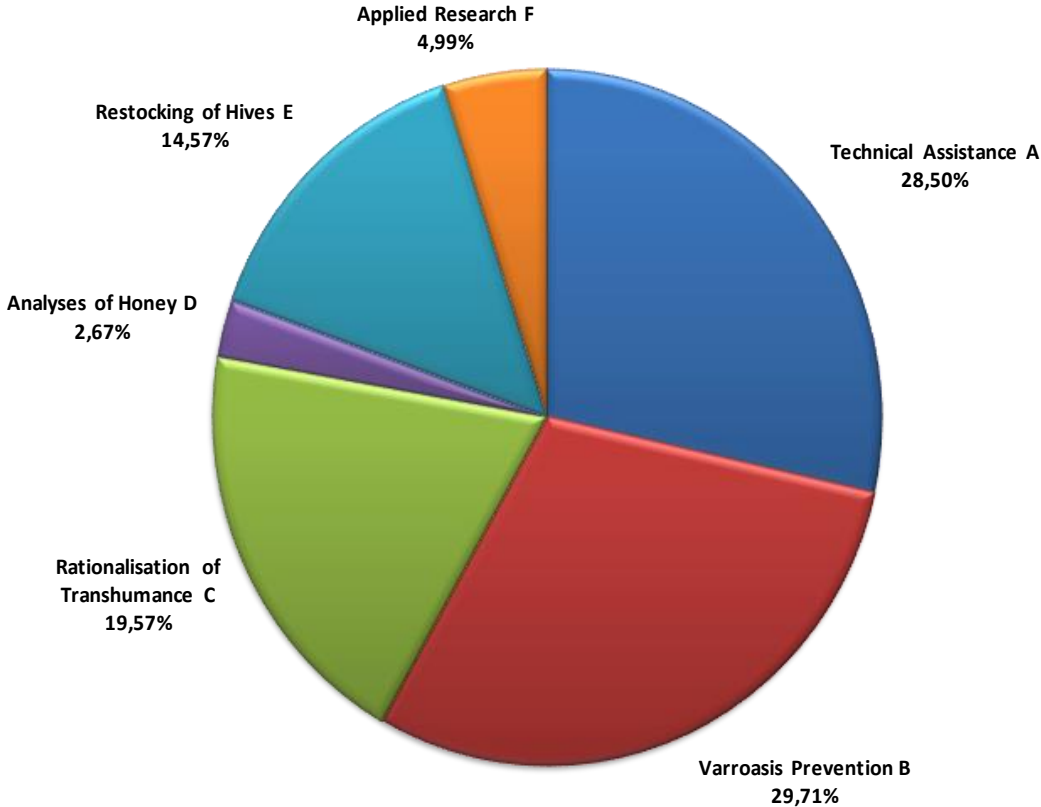
Combating varroasis and technical assistance to beekeepers and beekeepers' organisations (which accounted each for around 29% of total expenditure) were the two main used measures. This reflects the needs for the sector to continue to invest in beekeeping equipment, to constantly update beekeeping practices in order to fight against diseases and beehives' invaders, and to train new beekeepers.

Rationalisation of transhumance accounted for around 19 % of the total expenditure and was the third measure. In several Member States, transhumance is an essential beekeeping

practice, necessary to cover the nutritional needs of honeybees during the whole beekeeping season and to provide pollination services.

Restocking of beehives accounted for around 15% of total expenditure and was the fourth measure, followed in the fifth place by **applied research** (around 5% of total expenditure) and in the sixth place by **analysis of honey** (around 3% of total expenditure).

Figure 5: Expenditure incurred by type of measures for the 2015 apiculture year



5. MAIN CHANGES INTRODUCED BY THE REFORM OF THE CAP IN 2013

The reform of the CAP in 2013 introduced significant changes in relation to apiculture programmes. These changes are reflected in Articles 55 to 57 on aid in the apiculture sector of Regulation (EU) No 1308/2013 which replace Articles 105 to 110 on apiculture of Regulation (EC) No 1234/2007. Commission Delegated Regulation (EU) 2015/1366¹³ supplements Regulation (EU) No 1308/2013 on apiculture and Commission Implementing Regulation

¹³ OJ L 211, 8.8.2015, p. 3.

(EU) 2015/1368¹⁴ lays down the rules for the application of Regulation (EU) No 1308/2013 with regard to aid in the apiculture sector.

The main objectives of the CAP reform for the apiculture sector were:

- to adapt eligible measures to the needs of the sector;
- to ensure a sounder allocation of the EU budget by improving the methods used by the Member States to determine the number of beehives on their territories.

5.1 Eligible measures

Article 55(4) of Regulation (EU) No 1308/2013 modifies the list of eligible apiculture measures; it extends the scope of several measures and adds two new measures.

With the reformed CAP, there are now eight eligible measures for apiculture:

- (a) **technical assistance to beekeepers and beekeepers' organisations;**
- (b) **combating beehive invaders and diseases, particularly varroasis;** the scope of this measure was extended to take into account the needs of the sector to fight against the progression of Asian hornet (*Vespa velutina*)¹⁵, Small Hive Beetle (*Aethina tumida*)¹⁶ but also bees' diseases other than varroasis such as nosemosis or foolbrood.
- (c) **rationalisation of transhumance;**
- (d) **measures to support laboratories for the analysis of apiculture products with the aim of helping beekeepers to market and increase the value of their products;** the scope of this measure was extended to the analysis of other apiculture products¹⁷ such as royal jelly, pollen, propolis or beeswax. This is important to support the development of quality apiculture products and provide an additional source of income for beekeepers.
- (e) **measures to support the restocking of beehives in the Union;**
- (f) **cooperation with specialised bodies for the implementation of applied research programmes in the field of beekeeping and apiculture products;**
- (g) **market monitoring;** this is a new measure which could be used for example to monitor honey and apiculture products' production and prices.
- (h) **enhancement of product quality with a view to exploiting the potential of products on the market;** this is a new measure which could be used for example to exploit the potential of royal jelly or pollen.

5.2 Method to determine the number of beehives and allocation of the EU budget

¹⁴ OJ L 211, 8.8.2015, p. 9.

¹⁵ <http://presse.inra.fr/en/Resources/Press-releases/rapid-expansion-of-Asian-hornet>

¹⁶ http://ec.europa.eu/food/animals/live_animals/bees/small_hive_beetle_outbreaks/index_en.htm

¹⁷ Apiculture products covered by the apiculture programmes are listed in Part XXII of Annex I to Regulation (EU) No 1308/2013 and are honey, royal jelly, propolis and beeswax.

As mentioned before, the **key factor for the allocation of the Union contribution per Member State** is the **number of beehives** on its territory.

The 2013 CAP reform maintained that principle but the rules for determining the number of beehives were harmonized (to the extent possible considering the wide disparities of the beekeeping sector between Member States); in accordance with Article 4 of Commission Delegated Regulation (EU) 2015/1366, the Union contribution will be allocated in proportion to the **average total number of beehives during the two calendar years immediately preceding the notification to the Commission of the national apiculture programmes.**

Up to the 2014-2016 programmes, Member States had only the obligation to notify to the Commission the number of beehives on their territories, every three years, when submitting their national apiculture programmes. There were significant differences in the way Member States collected the information on their number of beehives in particular in relation to the types of beehives taken into account, the period and the years when the information was collected and finally the method used to determine the numbers. This situation needed to be addressed in order to ensure a sounder allocation of Union funds.

Articles 1, 2 and 3 of Commission Delegated Regulation (EU) 2015/1366 define the term "beehives", require that Member States have a **reliable method to determine, between 1 September and 31 December each year, the number of beehives ready for wintering present in their territory** and finally oblige Member States to notify each year their number of beehives starting from 2017.

In accordance with Article 2 and point (2) of the Annex to Commission Implementing Regulation (EU) 2015/1368, Member States submitted in their 2017-2019 national apiculture programmes a description of the method used to determine the number of beehives in their territories.

The description of the method used in each Member State is available in the 2017-2019 apiculture programmes published on the website of the Commission. A summary of the methods is presented in table 2. 18 Member States will use a mandatory registration system while 10 Member States will use a statistical method to estimate the number of beehives based on sampling beekeepers registered by beekeeping organisations.

In general, the mandatory registration of beehives is considered the most robust method but creates more administrative burden for beekeepers and Member States; beekeepers are obliged by national law to register their activity and declare their number of beehives to an administration. It is important to note that the six Member States with the largest number of beehives (ES, FR, EL, RO, IT, PL) chose mandatory registration of beehives whereas Member States with a less important apiculture sector opted for a statistical estimation method.

The reliability of the statistical methods for estimating the number of beehives depends on the quality of the database kept by beekeeping organisations and on the representativeness of the sample of beekeepers selected to provide information on their number of beehives.

Member States will notify to the Commission their number of beehives using the new methods for the first time on 15 March 2017. In accordance with Article 13 of Commission Implementing Regulation (EU) 2015/1368, the Commission will then make publicly available on its website aggregated data on the number of beehives notified by the Member States. These data will be updated every year and this will lead to a better monitoring of the number of beehives in the Union.

Table 2: Summary of the methods used by the Member States to determine the number of beehives on their territories in the 2017-2019 national apiculture programmes

Member States	Registration by the Competent Authorities of the Member States	Statistical method/Sampling based on databases kept by beekeeping organisations or voluntary registration
Belgium		X
Bulgaria		X
Czech Republic	X	
Denmark		X
Germany		X
Estonia		X
Ireland		X
Greece	X	
Spain	X	
France	X	
Croatia	X	
Italy	X	
Cyprus	X	
Latvia	X	
Lithuania	X	
Luxembourg	X	
Hungary	X	
Malta	Exhaustive count	
Netherlands		X
Austria	X	
Poland	X	
Portugal	X	
Romania	X	
Slovenia	X	
Slovakia	X	
Finland		X
Sweden		X
United Kingdom		X
EU-28	18 Member States	10 Member States

6. CONCLUSION

With the reform of the CAP in 2013, the legal basis for supporting the EU beekeeping sector via national apiculture programmes was improved. Eligible measures were adapted to the changing needs of the sector and the methods to allocate EU funds to the Member States on the basis of the number of beehives were streamlined. The first concrete effects of the reform

will be seen with the implementation of the 2017-2019 apiculture programmes which started in August 2016. No further legal proposal accompanies this report.

On the basis of the factual findings of the present report that shows that all Member States have national apiculture programmes in place and that more than 90% of Union funds made available were used, it can be concluded that the European market measures for the apiculture sector are operating satisfactorily. The next report -due in three years- will allow for assessing the impact of the new regulatory provisions introduced by the 2013 CAP reform.