EUROPEAN
COMMISSION

Brussels, 17.12.2019
COM(2019) 635 final

REPORT FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT AND THE COUNCIL

on the implementation of apiculture programmes

Contents

1. INTRODUCTION 2
2. METHODOLOGY 3
3. OVERVIEW OF THE EU APICULTURE SECTOR 3
3.1 Production and prices 3
3.2 Trade 5
4. IMPLEMENTATION OF NATIONAL APICULTURE PROGRAMMES 6
4.1 Legal basis 6
4.2 Objectives and Measures 7
4.3 Union Budget for national apiculture programmes and usage rate 8
4.4 Allocation of the Union contribution per Member State 9
4.5 Expenditure incurred per type of measures 10
5. METHODS TO DETERMINE THE NUMBER OF BEEHIVES 11
6. APICULTURE IN THE COMMON AGRICULTURAL POLICY BEYOND 2020 13
7. CONCLUSION 13

1. INTRODUCTION

As small as it can appear when compared to other agricultural sectors, apiculture plays an important role: in addition to providing honey and other apiculture products, it contributes to pollinating crops, fruits, wild plants, etc. There are several tools available in the Common Agriculture Policy (CAP) to support the apiculture sector, one being the apiculture programmes, set out in Regulation (EU) No 1308/2013[1] (the CMO).

According to Article 225(a) of the CMO, the Commission shall present a report to the European Parliament and the Council every three years 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 is pursuant to that provision. It is not accompanied by a legal proposal.

This report covers apiculture years 2017-2019, corresponding to the time period 1 August 2016 to 31 July 2019. These are the first apiculture years where new measures applied. The report includes information received in relation to previous apiculture years, as well as programmes planned for apiculture years 2020-2022, notified to the Commission by 15 March 2019.

This is the seventh report of the Commission to the European Parliament and the Council on the implementation of the apiculture programmes. The report does not include all elements relevant for beekeeping, but focuses on the implementation of the apiculture programmes. It does however also give a short overview of the apiculture sector in the EU and presents in short the Commission proposal for the apiculture sector for the future Common Agricultural Policy.

The EU has been supporting directly the beekeeping sector since 1997[2], giving Member States the possibility to draw up national programmes for their apiculture sector. The objective of these programmes is to improve general conditions for producing and marketing apiculture products: honey, royal jelly, pollen, propolis and beeswax.

The apiculture programmes are co-financed by the European Union at a 50% rate and last for three years. The programmes are voluntary, but all Member States have chosen to introduce them, showing the strong interest of Member States and the needs of the sector.

[1] Regulation (EU) No 1308/2013 of the European Parliament and of the Council establishing a common organisation of the markets in agricultural products OJ L 347, 20.12.2013, p.671.

[2] 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. METHODOLOGY

This report is based on the following sources of information:

- Information notified by Member States in accordance with Commission Delegated Regulation (EU) 2015/1366 with regard to aid in the apiculture sector[3], including the number of beehives in their territories.
- Information notified by Member States in accordance with Commission Implementing Regulation (EU) 2015/1368 with regard to aid in the apiculture sector[4], including the annual implementation reports, laid down in Article 10 of that regulation. Those annual reports include a summary of the expenditure incurred in euros during the apiculture year, broken down by measure, and the results based on performance indicators for each implemented measure. These indicators are however not harmonized at EU-level, and have not been used for drawing conclusions in the context of this report.
- Information received from Member States in accordance with Commission Regulation (EC) No 917/2004 on actions in the field of beekeeping[5], laying down the rules for the national apiculture programme until apiculture year 2016.
- Data on honey production and international trade from Eurostat[6], UN Comtrade[7] and the Food and Agriculture Organization of the United Nations (FAO)[8].

Detailed figures and summary tables on the honey market and on national apiculture programmes are available on the Commission website[9].

3. OVERVIEW OF THE EU APICULTURE SECTOR

3.1 Production and prices

Production

Figures notified in view of the 2020-22 programmes show that there were approximately 17.5 million hives in the EU, managed by 650 000 beekeepers. The number of beekeepers has increased compared with the notification received in 2016 for the 2017-19 programmes. It should however be noted that there is no harmonized method for the definition of beekeepers,

[3] Commission Delegated Regulation (EU) 2015/1366 of 11 May 2015 supplementing Regulation (EU) No 1308/2013 of the European Parliament and of the Council with regard to aid in the apiculture sector, *OJ L 211, 8.8.2015, p. 3–6.*

[4] Commission Implementing Regulation (EU) 2015/1368 of 6 August 2015 laying down rules for the application of Regulation (EU) No 1308/2013 of the European Parliament and of the Council with regard to aid in the apiculture sector, *OJ L 211, 8.8.2015, p. 9–16.*

[5] Commission Regulation (EC) No 917/2004 of 29 April 2004 on detailed rules to implement Council Regulation (EC) No 797/2004 on actions in the field of beekeeping, *OJ L 163, 30.4.2004, p. 83–87.*

[6] https://ec.europa.eu/eurostat

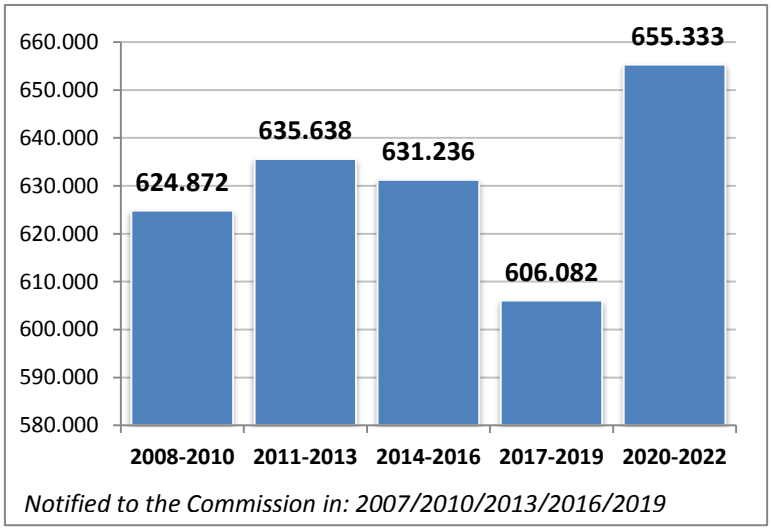
[7] https://comtrade.un.org/

[8] http://www.fao.org/home/en/

[9] https://ec.europa.eu/info/food-farming-fisheries/animals-and-animal-products/animal-products/honey_en

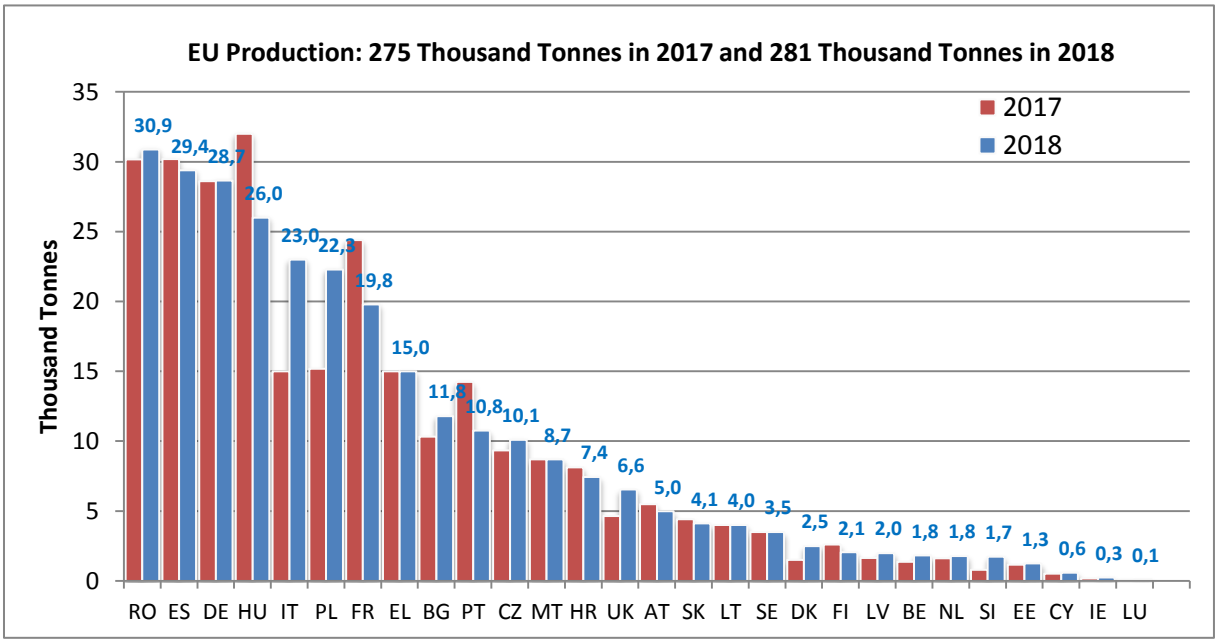
nor for how to estimate the number of beekeepers, and a change in that number does not necessarily reflect a general trend in the sector.

Figure 1: Number of beekeepers



The sector produced 280 000 tonnes of honey in 2018, making the EU the second largest honey producer after China (550 000 tonnes[10]). The EU production has increased by 16% since 2014, when it was 240 000 tonnes, but the EU still does not produce enough honey to cover its own consumption. In 2018, the rate of self-sufficiency[11] was around 60%, which is roughly at the same levels as in 2015. The main supplier for imported honey is China (40% of imports) followed by Ukraine (20% of imports).

Figure 2: EU honey production in 2017 and 2018



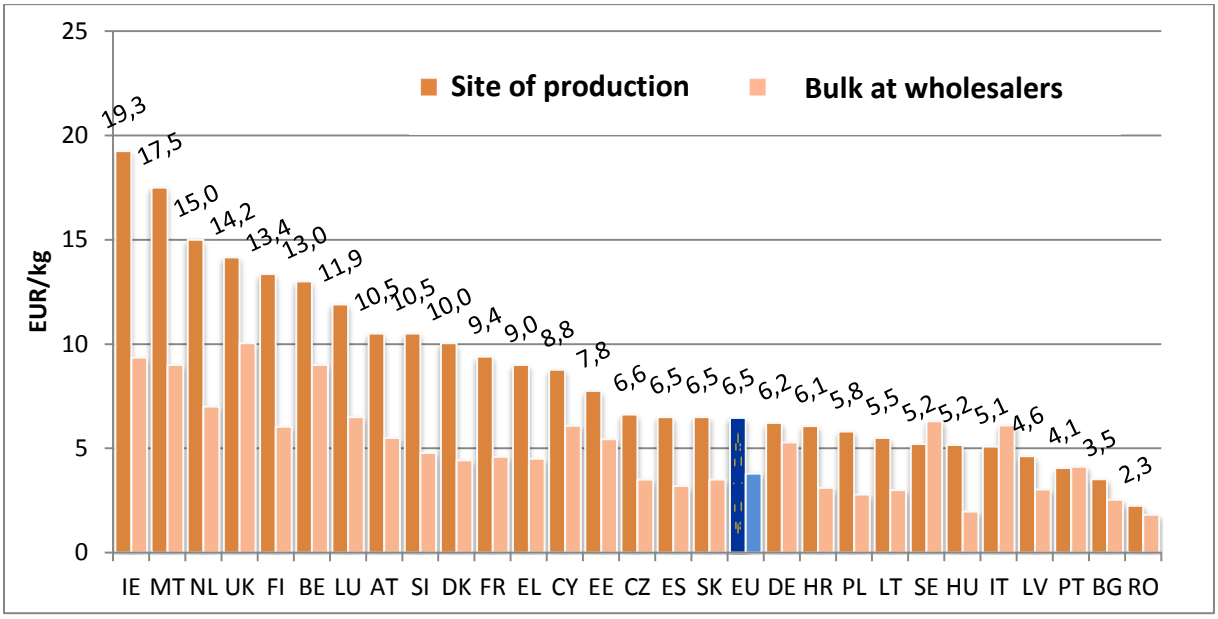
[10] Source: FAO

[11] Self-sufficiency rate = EU production/(production+imports-exports)

Prices

Prices for honey vary greatly between Member States, quality and point of sale. The EU average price for multi-floral honey at site of production in 2018 was EUR 6.46/kg. In most Member States the price is lower when sold in bulk at wholesalers, for which the average EU price in 2018 was EUR 3.79/kg. It is noteworthy that while these prices have barely changed since the previous received information in 2016, the average production cost has increased, from EUR 3.21/kg in 2015 to EUR 3.90/kg in 2018, possibly leaving a smaller margin per produced kg of honey. However, as Member States do not report how much of the produced honey is sold in bulk and at place of production, no firm conclusions can be drawn regarding the resulting profitability for producers.

Figure 3: Average prices for honey in 2018. MT: average of max/min price



3.2 Trade

Imports

The EU is only 60% self-sufficient in honey. In 2018, the EU imported 208 000 tonnes of honey with a total value of EUR 452 million. The EU is the first world importer of honey, with China as its main supplier. However, EU imports from China have decreased from close to 100 000 tonnes in 2015 to 80 000 tonnes in 2018[12]. During the same period, imports from Ukraine, the second main supplier, increased from 20 000 to 41 000 tonnes, while imports from the third and fourth suppliers, Argentina and Mexico remained at 25 000 respectively 20 000 tonnes.

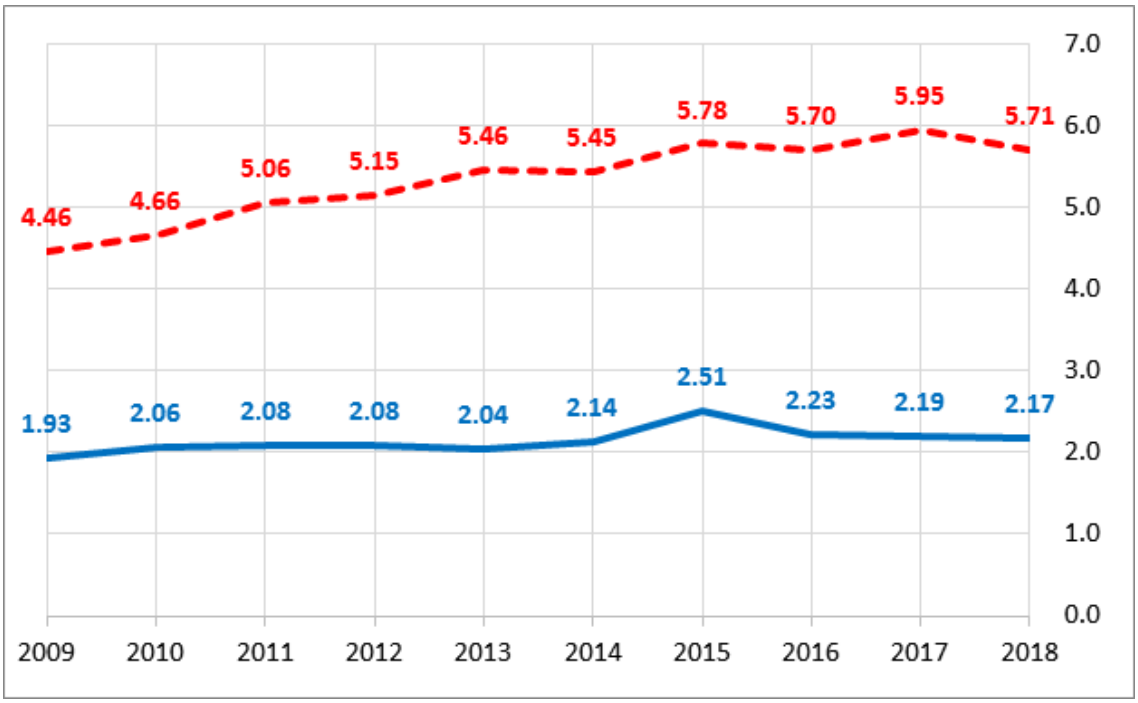
Honey imported from third countries is usually cheaper than honey produced in the EU, and for 2018, the average import price was just above EUR 2/kg.

[12] Source: Eurostat Comext, https://trade.ec.europa.eu/tradehelp/statistics

Exports

EU exports are negligible compared to imports, and in 2018, the EU exported around 21 000 tonnes of honey, representing in volume around 7% of EU production. The main markets for EU honey are Switzerland, Saudi Arabia, the USA and Japan. In 2018, the average export price was EUR 5.7/kg.

Figure 4: Average prices in EUR/kg for honey imported to (blue, solid) and exported from (red, broken) the EU during 2009-2018. Source: Eurostat Comext



4. IMPLEMENTATION OF NATIONAL APICULTURE PROGRAMMES

4.1 Legal basis

The legal basis for national apiculture programmes as of apiculture year 2017, starting on 1 August 2016, are articles 55 to 57 of the CMO, supplemented by:

- Commission Delegated Regulation (EU) 2015/1366[13], and
- Commission Implementing Regulation (EU) 2015/1368[14].

The programmes for apiculture years 2017-2019, and their financing, were approved through Commission Implementing Decision (EU) 2016/1102 of 5 July 2016[15].

[13] Commission Delegated Regulation (EU) 2015/1366 of 11 May 2015 supplementing Regulation (EU) No 1308/2013 of the European Parliament and of the Council with regard to aid in the apiculture sector, *OJ L 211, 8.8.2015, p. 3–6.*

[14] Commission Implementing Regulation (EU) 2015/1368 of 6 August 2015 laying down rules for the application of Regulation (EU) No 1308/2013 of the European Parliament and of the Council with regard to aid in the apiculture sector, *OJ L 211, 8.8.2015, p. 9–16.*

[15] Commission Implementing Decision (EU) 2016/1102 of 5 July 2016 approving the national programmes to improve the production and marketing of apiculture products submitted by the Member States under Regulation

The programmes for apiculture years 2020-2022, and their financing, were approved through Commission Implementing Decision (EU) 2019/974 of 12 June 2019[16].

4.2 Objectives and Measures

The objective of the programmes is to improve the general conditions for producing and marketing apiculture products in the Union. The 2013 CAP reform introduced some changes to the programmes. The main objectives of these changes were to adapt eligible measures to the needs of the sector, and 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. The resulting eligible measures are further described below.

(a) **technical assistance to beekeepers and beekeepers' organisations**: the wording of this measure changed from "groupings of beekeepers" to "beekeepers´ organisations". While many Member States include training, organisation of courses and printing of educational brochures under this measure, it may include a wide variety of actions. These include support to e.g. purchase of technical equipment for the primary processing and specific support to young beekeepers.

(b) **combating beehive invaders and diseases, particularly varroasis**: the scope of this measure has been extended from controlling varroasis to combat other beehives invaders and diseases, which may include e.g. Asian hornet (*Vespa velutina)* or Small Hive Beetle (*Aethina tumida*). However, most of the programmes that include this measure continue to focus on the control of varroasis. This is often achieved through supporting methods to decrease the parasitic load, but actions also include measures aiming at informing beekeepers on the importance of combating the varroa mite.

(c) **rationalisation of transhumance**; this action intends 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 measures such as identification of beehives and frames, a transhumance register, investment in material facilitating transhumance and mapping of flower varieties.

(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 has been extended from supporting analyses of the physico-chemical properties of honey, to include other apiculture products[17] such as royal jelly, pollen, propolis or beeswax. Furthermore, the CMO added that the measure should help beekeepers to market and increase the value of their products. The measure can be used for financing the testing of

(EU) No 1308/2013 of the European Parliament and of the Council *(notified under document C(2016) 4133), OJ L 182, 7.7.2016, p. 55–57*

[16] Commission Implementing Decision (EU) 2019/974 of 12 June 2019 approving the national programmes to improve the production and marketing of apiculture products submitted by the Member States under Regulation (EU) No 1308/2013 of the European Parliament and of the Council *(notified under document C(2019) 4177), OJ L 157, 14.6.2019, p. 28–30.*

[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.

e.g. the botanical origin of honey, as the precise knowledge of this may enable beekeepers to receive a higher price for their product.

(e) **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, purchasing of bee colonies or buying new hives.

(f) **cooperation with specialised bodies for the implementation of applied research programmes in the field of beekeeping and apiculture products**; this measure provides a possibility for Member States to support specific research projects. These may be aiming at improving the quality of honey, and/or disseminate the results of such projects.

(g) **market monitoring;** new measure which allows for the possibility to invest in monitoring apiculture products and prices. It can improve the conditions of production and supports national strategies for monitoring the market situation.

(h) **enhancement of product quality with a view to exploiting the potential of products on the market;** new measure introduced by the CMO which may be used for example to exploit the market potential of honey, but also of other apiculture products.

4.3 Union Budget for national apiculture programmes and usage rate

Union funds dedicated to the apiculture sector are relatively small but increased from EUR 36 million per year for the 2017-2019 apiculture programmes to EUR 40 million per year for the 2020-2022 apiculture programmes.

The Union contribution to apiculture programmes corresponds to 50% of the expenditure borne by the Member States. In concrete terms, it means that for the 2017 and 2018 apiculture years, EUR 72 million in total were available for the apiculture programmes each year. Although the funding was not fully utilised, the usage rate is high. For comparison, apiculture year 2016 is included in the table below.

Table 1: Union funding and usage rate for apiculture programmes

Union funds available per apiculture year	2016 apiculture year 2014-2016 programmes	2017 apiculture year 2017-2019 programmes	2018 apiculture year 2017-2019 programmes	2019 apiculture year 2017-2019 programmes	2020-2022 apiculture years
in EUR	33 100 000	36 000 000	36 000 000	36 000 000	40 000 000
Amount of Union funds used by Member States in EUR	31 102 215	32 372 777	33 974 000	Will be notified by 15 March 2020	Will be notified as of 15 March 2021
Usage rate	94%	90%	94%		

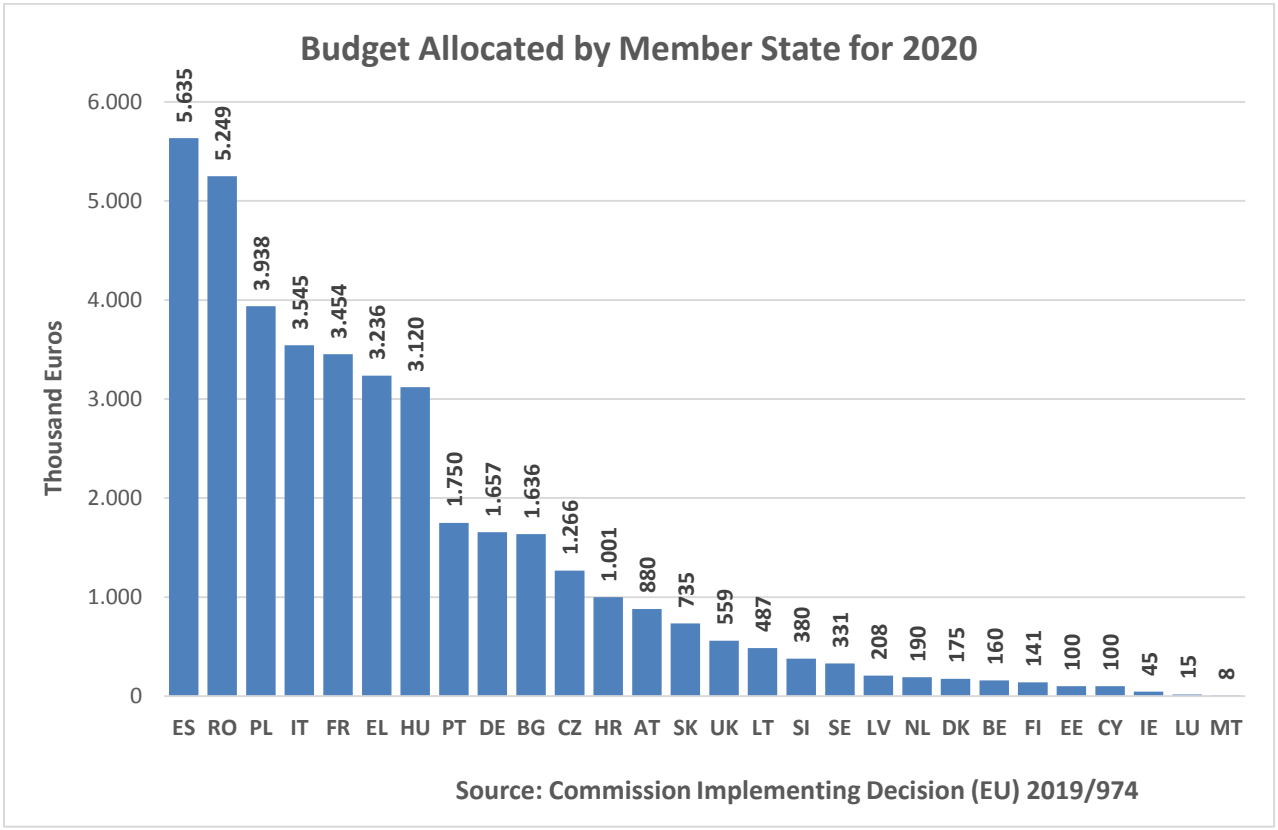
4.4 Allocation of the Union contribution per Member State

The rules for allocating the Union contribution to the apiculture programmes are laid down in Article 4 of Commission Delegated Regulation (EU) 2015/1366. The main factor for this allocation is the proportion of beehives in each Member State participating to the programme. This is one reason for the rules on the mandatory determination and notification by Member States of the number of beehives to the Commission, further described under heading 5 of this report.

The minimum Union contribution is EUR 25 000 per apiculture programme. Remaining Union funding is allocated depending on the proportion of beehives notified by Member States. However, if a Member States requests less than it would be entitled to on the basis of its proportion of beehives, remaining Union funding may be distributed to Member States that have requested more than their theoretical share of the funding.

In accordance with Article 8(2) of Regulation (EU) 2015/1368, the allocation of Union funds for the 2017-2019 apiculture programmes was made on the basis of the number of beehives communicated by Member States in 2013. For the 2020-2022 apiculture programmes, which were notified to the Commission in 2019, the allocation was based on the number of beehives notified in 2017 and 2018 (two calendar years immediately preceding the year of notification to the Commission of the national apiculture programmes).

Figure 5: Allocation of the Union contribution per Member State for the 2020-2022 apiculture years



4.5 Expenditure incurred per type of measures

In accordance with Article 10 of Regulation 2015/1368, Member States shall notify by 15 March each year an annual implementation report for the previous apiculture year. The first two annual reports, corresponding to the apicultural years 2017[18] and 2018[19], were notified in 2018 and 2019. The breakdown of expenditure per type of measure for apiculture year 2018 is shown in the pie chart below *(figure 6)*. For historical comparison, also the expenditure per type of measure for the apiculture year 2015 is included *(figure 7)*, showing that even though at that point the programmes could only contain six measures, the overall distribution, measured in percentage, remain similar.

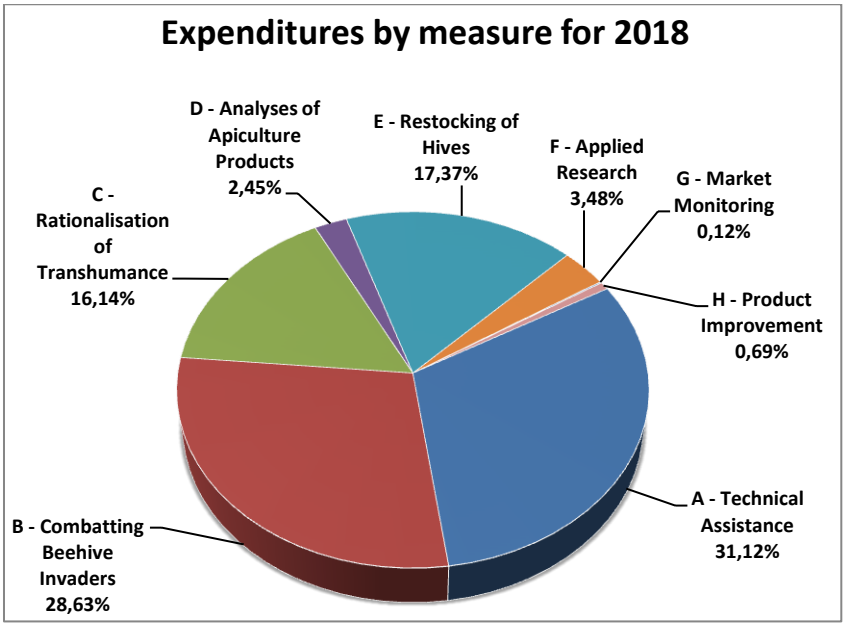
In 2018, as in previous years, the two measures **technical assistance** and **combating beehive invaders** receive most of the available funding, or close to 60% combined. This reflects the continuous need for the sector to invest in beekeeping equipment, update beekeeping practices in order to fight against diseases and beehives' invaders, and to provide training for beekeepers.

Also as in previous years, the two measures **restocking of beehives** and **rationalisation of transhumance** rank as the third and fourth most popular measures, accounting for more than 30% combined. 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.

Applied research and **analysis of honey** remained at the 5th and 6th place, receiving 3.48% respectively 2.45% of the available funding in 2018.

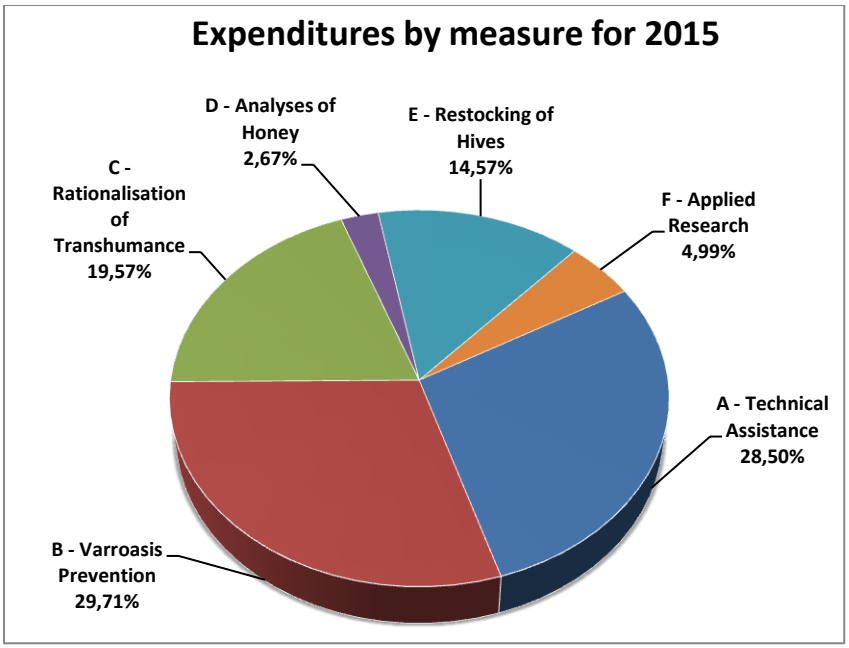
The two new measures, **product improvement** (0,69% of the total expenditure) and **market monitoring** together received less than 1% of the funding.

Figure 6: Expenditure in percentage per measure during apiculture year 2018



[18] Time period 1 August 2016 to 31 July 2017
[19] Time period 1 August 2017 to 31 July 2018

Figure 7: Expenditure in percentage per measure during apiculture year 2015



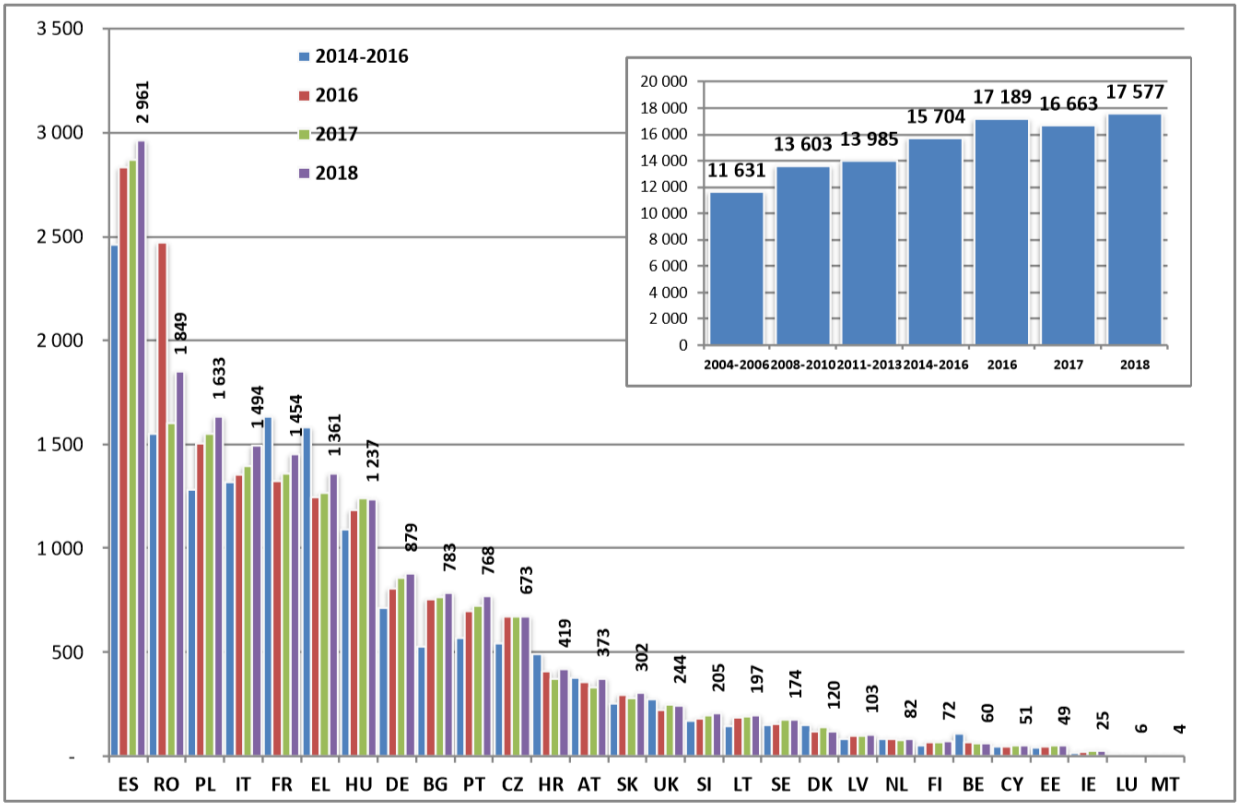
5. METHODS TO DETERMINE THE NUMBER OF BEEHIVES

As described under heading 4.2 of this report, changes were introduced 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. In accordance with the empowerment of Article 56(1)(b) of the CMO, the Commission adopted a delegated act laying down the basis for the allocation of the Union´s financial contribution to the Member States´ apiculture programmes, based on the number of beehives[20]. That delegated act introduced the definition of a beehive as *"... the unit containing a honeybee colony used for the production of honey, other apiculture products or honeybee breeding material, and all the elements necessary for its survival".* Furthermore, that act laid down the obligation for Member States submitting a national apiculture programme to have a reliable method to determine, between 1 September and 31 December each year, the number of beehives ready for wintering in their territory.

Given that there was no harmonized rule in relation to the matters described above before the application of that delegated act, the numbers of beehives notified before its application in 2017, should not be directly compared with the number of beehives notified as of March 2017. Nevertheless, the long-term historical trend indicates that the number of beehives in the European Union has increased over the last decade. This positive trend can be seen in almost all the Member States.

[20] Commission Delegated Regulation (EU) 2015/1366

Figure 8: Evolution of the number of beehives in the EU in thousands



According to Commission Implementing Regulation (EU) 2015/1368, Member States shall include in their national apiculture programmes a description of the method used to determine the number of beehives in their territories.

A total of 17 Member States are using mandatory methods for counting beehives including the Member States with the highest number of hives, such as ES, RO, IT, FR and EL. The mandatory methods may include the obligatory registration of beekeepers and/or beehives in a specific register, set up for that specific purpose, or the use of data from other mandatory registers such as veterinary information systems.

A total of 11 Member States are instead using other methods than mandatory registration. These include Member States with fewer beehives, such as SE, DK, IE and EE. These Member States may rely on information received from beekeepers´ organisations, surveys, censuses, or a combination of these methods.

In general, the mandatory registration of beehives is considered the most robust method but creates an 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.

The reliability of other 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.

6. APICULTURE IN THE COMMON AGRICULTURAL POLICY BEYOND 2020

In its proposal for a CAP beyond 2020[21], the Commission proposes to move the apiculture programmes from the Common Market Organisation Regulation to the CAP Strategic Plan Regulation[22]. This will increase the visibility of the apiculture sector and ensure that its contribution to the overall objectives of the Common Agricultural Policy is taken into account.

The proposal also includes an increase of the funding of the apiculture programmes, to EUR 60 million per year. This means that over the 7-year period of the future CAP, Union funding together with the Member States´ contributions, a total of EUR 840 million is available for the sector. A further change introduced by the proposal is that the annual funding to the Member States apicultural programmes is laid down in the basic act[23].

It continues to be necessary to know the number of beehives in Member States to be able to follow the trend, to evaluate the impact of support measures to the apiculture sector and to keep European citizens informed. Therefore, the Commission proposal includes the continued obligation for Member States to count the number of beehives and notify the result to the Commission.

While the apiculture programmes were voluntary under the CMO, the Commission proposes that they become mandatory in the Member States' CAP strategic plans.

7. CONCLUSION

Although the apiculture programmes have remained voluntary under the CMO, all Member States continue to introduce the programmes, developed in cooperation with the sector. The programmes vary between Member States, depending on the needs of that particular Member State, but the measures receiving most of the support - technical assistance and combating beehive invaders – have remained unchanged since the last report in 2016.

The funding to the sector has continued to increase over the last programming periods, and the uptake of the funding remains high, showing the relevance of the chosen measures.

The number of beehives is one indicator of the impact of the support measure and this number continues to increase. However, looking at the overall profitability of the sector, EU average prices have not increased, while production costs are increasing and import prices decreasing. This poses challenges for the sector and indicates a continued need for support, also considering the important role of bees for the environment and agriculture.

[21] https://ec.europa.eu/info/food-farming-fisheries/key-policies/common-agricultural-policy/future-cap_en

[22] https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=COM%3A2018%3A392%3AFIN

[23] Annex VIII of the Commission proposal for CAP beyond 2020.