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DIRECTORATE-GENERAL FOR AGRICULTURE AND RURAL DEVELOPMENT

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MINUTES

Meeting of the CDG ON ANIMAL PRODUCTION – SHEEPMEAT AND GOAT / BEEKEEPING

22 November 2023

Chair: DG AGRI E3 – Animal Products

The following organisations were represented: see Annex.

1. Nature of the meeting

Non – public / Online Interactio

2. List of points discussed

Morning session – Beekeeping

1. Welcome and adoption of the agenda

The agenda was adopted.

2. Honey market overview

The Commission presented an overview of the honey market situation based on the latest available data. Continuing a gradual increasing trend since 2017, the number of beehives in the EU reached 20.3 million in 2022 (+1.1% compared to 2021). The number of beekeepers in 2022 increased to more than 700 000 beekeepers (+15% compared to the latest reporting in 2019). EU honey production increased to 286 000t in 2022 (+25% compared to 2021). In January-August 2023, EU honey imports declined significantly to 106 000t (-18%) compared to the same period last year, with imports decreasing from all main origins. Main EU suppliers continue to be China and Ukraine. Over the same period, EU honey exports increased marginally (+1.2%) to 16 000t. The EU honey trade balance remained largely negative. Both, import and export unit values declined in the period January-August 2023 year-on-year, indicating an overall drop in world honey prices. The EU continued importing lower value honey and exporting higher value one.

Some stakeholders reported on decreasing market shares for EU honeys on the internal market, possibly attributable to a drop in consumption, especially for high quality honeys, but also to a loss of confidence in the product following recent reports on honey adulteration with sugar. Others point to an abundant global honey harvest in 2023 pushing world honey prices down (combined with an unfavourable exchange rate USD/EUR) as well as lower demand due to general inflationary environment. Several stakeholders report problems with honey sales, leading to an accumulation of stocks and related pressure on prices. There was a call from some stakeholders for further investigation of underlying causes for declining market share of EU honeys and for a common strategy of beekeepers, packers and importers to gain back consumer confidence.

3. Revised EU Pollinators initiative

The Commission presented an overview of the revised communication on the EU Pollinators Initiative - A new deal for pollinators followed by the four actions included in the communication relevant for agriculture and the CAP, as well as the actions to mitigate the risk of pesticides use on pollinators from section 6 of the revised Pollinators Initiative. Replying to a question, the Commission clarified which CAP interventions under CAP Strategic Plans are benefiting pollinators.

4. Emerging threat to honeybee population in the EU: Asian hornet (*Vespa velutina*)

a) Control of invasive species in the EU under the Invasive Alien Species Regulation

The Commission presented the EU policy framework to control invasive species under the Invasive Alien Species Regulation (Regulation (EU) 1143/2014). The Regulation includes a set of measures to be taken across the EU in relation to invasive alien species. The core of the Regulation is the list of Invasive Alien Species of Union concern, which includes Asian hornet. The species included on this list are subject to restrictions and measures set out in the Regulation. These include restrictions on keeping, importing, selling, breeding, growing and releasing listed species into the environment.

b) Threat of Asian hornet to honeybee populations – producer's perspective

Copa-Cogeca presented a comprehensive overview from the producers' standpoint regarding the growing threat of the Asian hornet (*Vespa velutina*) to honeybee populations in the EU. The severe consequences of this invasive species on beekeeping, agriculture and human health were explained as well as the current situation, emphasizing the distribution and impact of the Asian hornet across Europe and related national actions. Considering the escalating concern, Copa-Cogeca called the European Commission to take measures to manage potential future invasions and make sure provisions of Reg. 1143/2014 are implemented rigorously by Member States. A rigorous implementation of mandatory monitoring and centralized management is necessary, accompanied by an EU-wide coordination aiming at minimizing the impact on native biodiversity, beekeeping and agriculture, especially in regions where *Vespa*

velutina is endemic. Copa-Cogeca called for the creation of a user-friendly platform that would facilitate timely exchange of crucial contacts and data, thereby enabling swift and efficient communication between Member States, which would enhance collaboration and ensure a unified response to the threat posed by the Asian hornet.

5. Follow up on the EU coordinated action “From the hives”

a) Feedback on “From the hives” from third countries – next steps

The Commission informed about the planned publication in the EU Official Journal (on 28 November 2023) of Commission Delegated Regulation (EU) 2023/2652 which provides that consignments of honey and of other apiculture products intended for human consumption may only enter the Union if dispatched from, obtained and/or prepared in establishments that appear on lists drawn up and kept up to date in accordance with Article 127(3) of Regulation (EU) 2017/625. The text also provides for a transitional period of twelve months from its date of publication after which consignments originating from establishments not listed will be denied entry into the EU.

Some stakeholders enquired about concrete follow up actions by Member States’ competent authorities on the findings of suspicious honey consignments under the 2021-2022 EU Coordinated Action. The Commission clarified in the chat that all suspicions identified during the coordinated action led to follow-up actions by Member States’ authorities. When additional official controls and investigations confirmed suspicions, consignments were downgraded, others rejected at the border, or penalties imposed on the operators concerned. Not all suspicions were confirmed, in particular due to the lack of harmonised EU analytical methods on the subject.

b) Update on the JRC project on harmonisation of testing methods to determine exogenous sugars in honey – report from first technical roundtable with experts

The JRC presented the main objectives of the HarmHoney” project, which is the harmonisation of test methods to determine exogenous sugars in honey. This work will set reference methods to verify whether honey is compliant with the provisions of the EU Honey Directive and aims at increasing the capability of official control laboratories. After that, the JRC may write recommendations towards standardisation by Standard Development Organisations (such as CEN, ISO or AOAC International).

The JRC explained the main conclusions of the technical roundtable that was held in Geel in October, including the need to have the support and knowledge sharing of all stakeholders. It was clear that there will need to be a combination of several markers (some additional markers were proposed by the participants) with several analytical methods. Private laboratories showed willingness to share key parameters of their analytical methods, for the purpose of comparison with JRC protocols for possible improvements.

6. Revision of the Honey Directive- state of play

The Commission updated participants on the state of play of the Honey Directive 2001/110 review.

In the Council, the Commission's proposal has been discussed at 6 Working Parties and 4 meetings of the Special Committee for Agriculture (SCA). On 14 November, the SCA gave a negotiating mandate to the Council Presidency for entering in dialogues with the EP and Commission.

In the European Parliament, ComAGRI voted unanimously its opinion on 16 November. The Commission provided an overview of the main proposed amendments. The lead ComENVI was expected to vote on its report on 29 November.

7. AOB

No points raised.

Afternoon session – Sheep and Goat

1. EU sheep and goat market overview (production, prices, trade)

The Commission gave an overview of the market situation for sheep and goats. EU average lamb prices gained momentum last month, and are higher than usual seasonal quotations, thanks to limited domestic supply in most Member States. With new season lambs slower to come forward this year, the tighter marketplace has offered support to more EU imports of sheep meat from the UK and New Zealand and restrained exports to several traditional destinations. At world level, prices in Australia remain very competitive, thanks to its record sheep flock, and weighed on New Zealand traded quotations.

COPA-COGECA representatives advocated for a more prudent approach when analysing farmers' results following the recent spike in lamb prices and warned against the potential export capacity of Australia in the short term. IFOAM complained about the Commission's inaction to stop live trade with third countries.

2. New perspectives for fibre animals and derived products

a) Introduction to the Transition Pathway for the Textiles ecosystem

The Commission informed that the [transition pathway for the textiles ecosystem](#) was published on 6 June 2023. Through co-creation with stakeholders, the transition pathway identifies 50 specific actions to make the textiles ecosystem greener and more digital and to ensure its long-term resilience and competitiveness. Actions include promotion of circular and sustainability practices, support for SMEs to innovate and grow internationally, create more demand for sustainable products and onboard consumers in the green transition, foster innovation and research on sustainable manufacturing processes, as well as actions on up-and reskilling and implementing the EU Pact for Skills for the Textiles ecosystem. Stakeholders are encouraged to submit commitments to contribute to the implementation of the Pathway, via the ongoing [call for commitments](#). For more about the Transition Pathway, see [Textiles Ecosystem Transition Pathway cocreation process \(europa.eu\)](#).

b) Support of textiles to SMEs

The Commission explained that Enterprise Europe Network (EEN) and Erasmus for Young Entrepreneurs (EYE) provide support to SMEs in the areas of innovation and internationalisation, among other areas, such as resilience and skills. EEN can provide a complete service in all areas and sectors, from matchmaking, participation in trade fairs and sourcing new suppliers or markets in contexts of supply-chain disruptions, as well as innovative ways of using products (or by-products) originating from animal production across sectors. EYE can provide an opportunity to match new entrepreneurs (of all ages) with existing companies, in a mentoring scheme that can also foster new ways of working and using all outputs of animal production in alternative ways.

c) Global sheep and wool perspective

A representative of the International Wool Textile Organisation (IWTO) presented the global wool industry that encompasses a diverse array of sheep breeds around the world, supplying the world with wool for apparel and interiors. Wool is currently 1% of the overall global fibre market. Australia produces upwards of 80% of the world's Merino wool, the fine wool that is used primarily in apparel. All over the world, sheep and their wool are extremely important to the livelihood of small farmers and rural communities.

Wool is a uniquely constructed protein fibre, having many natural properties inherent to the fibre and which cannot be reproduced synthetically. Among other things, wool is naturally odour-resistant, naturally flame-resistant. Wool's strength is its elasticity, which provides its beautiful drape and the ability for wool clothing to regain its shape between wearings.

The applications for wool are limited only by the imagination and more are being developed every day.

The International Wool Textile Organisation, the IWTO, represents the interests of the wool textile value chain. Its 36 members in 24 countries cover the wool pipeline from sheep to shop.

IWTO's mission is to make sure the next generation inherits a thriving wool industry. One of the most important areas of IWTO's current work is to ensure that sustainability legislation, in the EU and elsewhere, is based on a solid understanding of the natural fibres industries and that sustainability methodology does not disadvantage natural fibres like wool.

d) Wool & hides situation from the producers and agri-cooperatives' perspective

The chairman of the Copa-Cogeca WP on Sheep & Goats made a detailed presentation on the subject:

- Context: the EU wool sector is currently facing a crisis, with wool and hides shifting from historical and sustainable by-products into costs for producers and agri-cooperatives. Common challenges across member states include

high production costs, small profits, lack of processing facilities, and difficulties accessing international markets.

- Case study – Spain: with an estimated wool production of 22,000 tonnes in 2022, Spain faces challenges like other MS. The decline in sheep censuses in Spain, along with a loss of wool quality, is attributed to factors like synthetic fibres reducing demand and eradicated diseases restricting exports.
- Main Conclusions: to address challenges in the wool sector, there is a need for the creation of a new category for wool in the classification of animal by-products where its actual sanitary risk is treated in a more accurate way than in current Regulation 1069/2009 (this would open the way to facilitate the movement of wool out of the farm). Other recommendations include the EU promoting its own wool certification for sustainability, launching promotional campaigns to highlight the values and benefits of wool, and conducting a study to identify and prevent the closure of processing industries in the EU.

Answering a request for a European programme to promote wool, the Commission pointed out that, according to Regulation (EU) 1144/2014 on information provision and promotion measures concerning agricultural products and notably its Article 5, wool is not among the eligible products under the current policy framework. However, in the context of a future revision of the promotion policy and during the consultation of stakeholders, wool was mentioned as a potential product to be included.

e) Wool is an underappreciated by-product: ways to increase its added value

COPA-COGECA and FESASS representatives presented the main outcomes of the “Schafwollkonvent 2023”, a joint conference on increasing the efficiency of German sheep wool utilization, that took place on 24 / 25th October in Leipzig. Major obstacles include the problems with export certification, the classification of wool as a “category 3” risk material and missing support for the development of alternative uses.

f) As regards trade in wool:

i. The scope of Animal by-products Regulation

The Commission shortly presented the scope of the legislation on animal by-products (Regulation (EC) No 1069/2009 and Implementing Commission Regulation (EU) No 142/2011) in parts applicable to wool and the role of operators, the Competent Authority and the Commission.

The legislation on animal by-products provides for rules for a safe use of wool as feed, organic fertilisers, or in the textile industry.

ii. The scope of Fertilising products Regulation (Regulation (EU) 2019/1009)

The Commission shortly presented the scope of the Fertilising Products Regulation (‘FPR’), which contrary to most of EU Regulations does not fully harmonises the market of fertilising products.

She noted that manufacturers of fertilising products have two options: a) follow the FPR rules and make available on the EU market of EU fertilising products, which bear the CE-marking or b) follow national rules to make available on respective Member States' markets of their fertilising products and then use mutual recognition rules to have these products sold on other national markets.

FPR sets out concrete requirements for the 7 categories of products' functions and for the 15 categories of component materials, which are covered by its scope.

Derived products from animal by-products (such as manure or wool) may be used as components in EU fertilising products, as long as:

- a) an end-point in the manufacturing chain should be determined for this materials under the animal by-products Regulation and
- b) this end-point should have been reached when the final EU fertilising products is made available on the market.

As regards wool, given that none of the above conditions are met for the moment, she asserted that wool may not be used in the manufacturing of EU fertilising products.

g) Research and Innovation activities in fibre animal production

The Commission gave an overview on the several EU funded research and innovation (R&I) activities (collaborative projects, networking activities, co-fund actions, bilateral and multilateral cooperation) on small ruminants. It was clarified that R&I on livestock, funded by the EU Framework Programme, do not focus on a specific sector (e.g. fibre animals) but try to be more effective by having a system approach, reflecting changes in societal concerns and the need for sustainable and resilient livestock farming practices. Projects on small ruminant embracing themes such as sustainability, GHG mitigation, circularity, grassland management, breeding, genetic, animal health and welfare were shortly presented. A few Horizon Europe open calls (WP 2024) of potential interest were brought to the attention.

h) The use of wool in/from Agroforestry systems

Two EURAF delegates presented good practices in the field of wool management in agroforestry systems - with a focus on case studies from Italy and Ireland. Agroforestry, with its integration of trees and crops or livestock, can offer a holistic approach to land management that benefits both the environment and farmers. Building on research evidence on the multiple uses of wool (e.g. textile, mulching material, tree protection), farmers managing/establishing agroforestry systems have the possibility to diversify their sources of income and shorten agricultural supply chains.

3. AOB and end of the meeting

The representatives of the German breeders' association had a written question about concerns on the interpretation of EU Regulations N 1069/2009 and 142/2011 regarding classifying wool as category 3 when placing it on the market.

The Commission replied that any product of animal origin not intended for human consumption is categorised according to the ABP legislation with very limited exemptions of derived products that reached an end point in the manufacturing chain.

Since wool is considered as category 3 material, i.e low-risk material, it may be used for the manufacture of derived products and be placed on the market applying the principles of safe sources, safe treatment and safe end uses (Art. 36 to 39 of Regulation (EC) No 1069/2009). Besides, wool, which fulfils the specific requirements for the end point set out in point B of Chapter VII of Annex XIII to Regulation (EU) No 142/2011, may be placed on the market without restrictions in accordance with this Regulation.

Additionally, Member States may authorise the placing on the market of untreated wool from farms or from establishments or plants which have been registered in accordance with Article 23 of Regulation (EC) No 1069/2009 or approved in accordance with Article 24(1)(i) of the same Regulation on their territory without restrictions in accordance with this Regulation, if they are satisfied that no unacceptable risks to public and animal health arise from the wool.

A question posted in the chat from CEJA on *Brucella Ovis* was shared with DG SANTE responsible for the field (i.e. the DG SANTE G2) that provided a reply in writing after the meeting.

3. Next meeting

Scheduled in spring 2024.

4. List of participants

See annex.

(e-signed)

Pierre BASCOU

List of participants– Minutes
Meeting of the Civil Dialogue group on
ANIMAL PRODUCTION - SHEEPMET AND GOAT / BEEKEEPING
22 November 2023

| <i>Association</i> |
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| AnimalhealthEurope |
| Bee Life - European Beekeeping Organisation |
| CEJA - Conseil Européen des Jeunes Agriculteurs / European Council of Young Farmers |
| CELCAA - European Liaison Committee for the Agricultural and AGRI-Food Trade |
| COGECA - European agri-cooperatives / General Confederation of Agricultural Co-operatives of the European Union |
| COPA - "European farmers / Committee of Professional Agricultural Organisations of the European Union |
| EURAF - European Agroforestry Federation |
| ECVC - European Coordination Via Campesina |
| FEEDM - Fédération Européenne des Emballeurs et Distributeurs de Miel |
| FACEnetwork - Farmhouse and Artisan Cheese and Dairy Producers' European Network |
| FESASS - Fédération Européenne pour la Santé Animale et la Sécurité Sanitaire |
| FoodDrinkEurope |
| IFOAM - International Federation of Organic Agriculture Movements European Regional Group |
| International Wool Textile Organisation (IWTO) |

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