

DG AGRI

“Evaluation of measures for the apiculture sector”



Table of contents

1. Objectives of the evaluation

2. Methodology recap

3. Main findings

4. Recommendations

Objectives of the evaluation

The aim of the evaluation was to assess the impacts of the implementation of the provisions in articles 105 to 110 of Council Regulation (EC) No 1234/2007 relating to measures improving the general conditions for the production and marketing of apiculture products.

The measures covered are:

1. Technical assistance to beekeepers and groupings of beekeepers;
2. Control of varroasis;
3. Rationalisation of transhumance;
4. Measures to support laboratories carrying out analyses of the physic-chemical properties of honey;
5. Measures to support the restocking of hives in the Community;
6. Cooperation with specialised bodies for the implementation of applied research programmes in the field of beekeeping and apiculture products.

Objectives of the evaluation

Descriptive part:

- **The evaluation included an overview of the apiculture sector, which covered:**
 - The EU apiculture sector;
 - The world market for honey;
 - The main EU honey production systems;
 - The marketing structures of EU honey producing beekeepers;
 - The CAP measures previously mentioned.

Evaluation part:

- **The evaluation assessed:**
 - The effectiveness, efficiency and relevance of the implementation of the CAP measures, as well as unintended side effects and deadweight;
 - The coherence of Council Regulation (EC) No 1234/2007 with rural development measures, bee health initiatives, sanitary measures and EU research programmes, relevant information provision and promotion measures, and measures of the Member States and of private actors in the sectors.

Table of contents

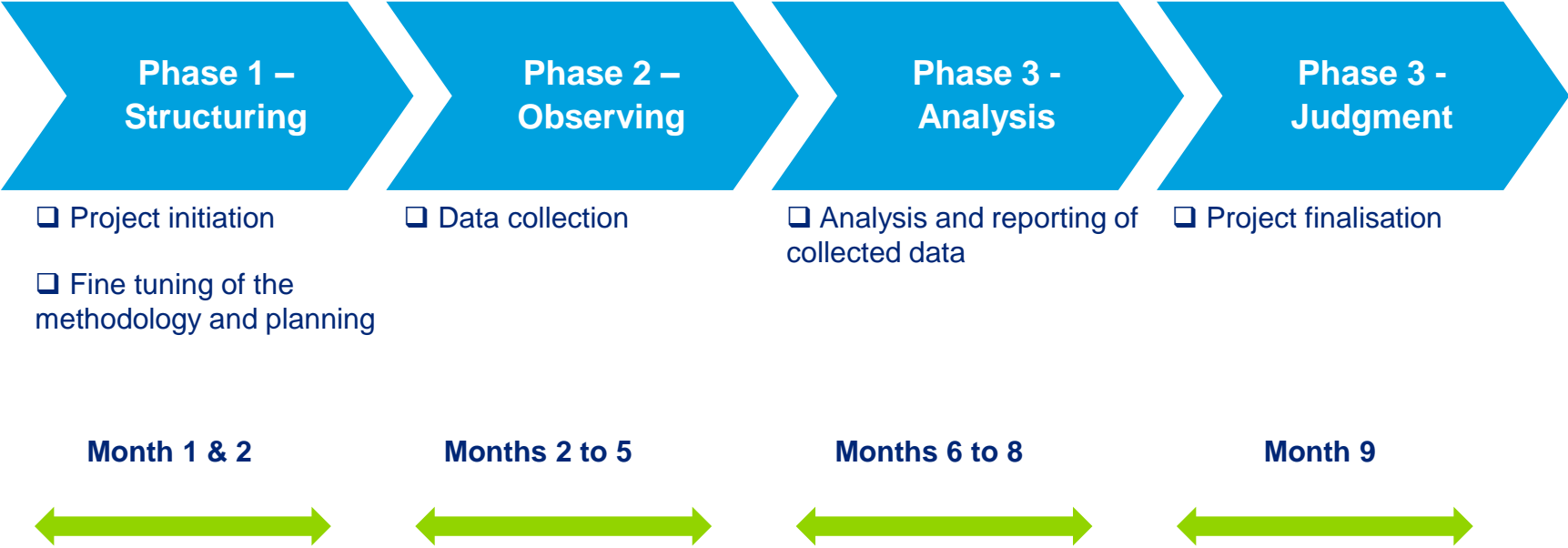
1. Objectives of the evaluation

2. Methodology

3. Main findings

4. Recommendations

Methodology



Methodology

- Desk research
 - Various reports
 - National apiculture programmes
 - Databases (FAOSTAT, Eurostat, UN Comtrade)
- Interviews with key stakeholders at EU level (16 interviews)
- Fieldwork and case studies (DE, EL, ES, HU) (29 interviews)
 - National experts
 - Face to face interviews with key stakeholders
 - Desk research
- Web based surveys
 - Survey for national and regional administrations (58 responses)
 - Survey for beekeepers and beekeeping associations (1023 responses)
 - EU-wide survey in English
 - Country surveys in local language (DE, EL, ES, HU)

Table of contents

1. Objectives of the evaluation

2. Methodology recap

3. Main findings

4. Recommendations

Main findings

Theme I: Effects on production, marketing and trade

Honey production

Quantity of honey

- Positive contribution to stabilising honey production levels in the EU despite rising production costs, price-competitive honey imports from third countries and threats from diseases.
- Technical assistance measure has contributed to productivity and quality gains through dissemination of technical information and facilitation of acquisition of more efficient production equipment.
- Positive impact of the varroa control measure, as varroa remains a major threat. However, in some countries the take-up of the measures was limited.
- The rationalisation of transhumance measure was highly valued in the case study countries Greece and Spain, in which there are high proportions of professional beekeepers. The measure was hardly used elsewhere in the EU.
- Where applied, the restocking of hives received general support from beekeepers and they assess the effect on production as clearly positive.
- Stakeholders consulted in the evaluation expressed unanimously their belief in the potential importance for honey production of the applied research measure.
- The measure to support laboratories carrying out analyses of the physico-chemical properties of honey has contributed to the quality of honey.

Main findings

Theme I: Effects on production, marketing and trade

Honey production

Quality of honey

- Positive contribution to ensuring the quality of the honey produced in the EU.
- Greatest contribution provided by the support to laboratories carrying out physico-chemical analysis of honey and the technical assistance measures.

Marketing of honey

- No noticeable effect on the consumption of honey (stable in the EU over the last 15 years).
- Limited impact on production structures in the EU. E.g: All the honey produced in Germany continued to be sold locally and through direct sale, while around 50% of the honey produced in Spain is still sold to wholesalers.
- Positive but limited (in the view of beekeepers) contribution of the support to the analysis of the physico-chemical properties of honey.
- General view is that there is significant margin for improvement. Examples of successful initiatives supported by the measures include DIB's quality label in Germany and OMME's Hungarian producers honey jar.
- Market structure and more concretely high bargaining power of wholesalers outlined as the major obstacles for beekeepers.

Main findings

Theme I: Effects on production, marketing and trade

Trade of honey

- Both intra-EU and trade with third countries have remained stable since 2008.
- In principle, by favouring the maintenance of EU domestic production, the measures may have contributed to stimulating honey exports and containing imports. However, direct substitution between the different types of honey produced in the EU and imported honey is limited.
- Positive trade effects of the measures at the local level arising from quality promotion.
- The overall maintenance of high quality levels in EU honey production has been a factor contributing to a widening (positive) gap between the average honey export price and the average honey import price.

Keeping and trade of live bees

- Moderate positive effect of the measures.
- Trade in live bees remained largely local and limited.
- Beekeepers breed their own queens and swarms to restock their hives to cover losses suffered during the winter and due to other causes.

Main findings

Theme I: Effects on production, marketing and trade

Support to economic activity and income of professional beekeepers

Curbing the increase in production costs

- Strong rise in beekeepers' production costs in recent years due to increased mortality rates in some regions which has impacted price of colonies, rising fuel costs (for transhumance), rising varroa medication costs, and the increase in the cost of non-natural feeding products.
- Increase in production cost has hit the income of beekeepers and of farmers, since higher costs have not been matched by corresponding increases in selling prices.
- The measures have limited the impact of the higher costs by supporting the purchase of varroa medication, production related equipment and the restocking of hives.

Diversification of income sources

- The measures have sporadically encouraged the diversification of beekeepers' income by raising awareness on the potential of other apicultural products such as wax or royal jelly, when included in the national apiculture programmes.

Honey price stability

- Honey prices have on average risen over the last few years, but with relevant yearly variations. The prices of low-quality honey are largely determined by the world honey market. Higher-quality honey prices vary more locally, and are critically affected by national market structures in the EU.
- By contributing to stability of production, it can be argued that the apiculture measures have made a contribution to price stability, since 60% of EU consumption is domestic.

Main findings

Theme II: Effects on the structures of production

- Measures targeting individual beekeepers have enabled beekeepers, particularly professionals, to acquire modern production equipment, spurring the mechanisation of the beekeeping activity and enhancing productivity in the sector.
- Access to modern equipment enables beekeepers to treat varroasis more efficiently.
- Collective measures have also spurred productivity increases, for both professionals and non-professionals, through the dissemination of information (adequate varroa treatment, pollination potential of a specific area) helping beekeepers to produce more efficiently.
- Informing beekeepers of adequate varroa treatment practices is particularly useful and necessary for non-professionals to limit one of the negative externalities of beekeeping: the spread of varroa.
- The measures have had some impact on increasing the number of professional beekeepers, in part because eligibility for the measures was restricted to professionals in some countries.
- Overall, the measures have contributed to rendering beekeeping more productive and have led to structural improvements in the sector.

Main findings

Theme III: Effects on the downstream sector

- Needs of the downstream sector mirror those of consumers: their price-sensitivity is related to the type of honey which they purchase (consumers are willing to pay a higher price for specialist honey, but not for honey mixes).
- Honey mixes enable the downstream sector to blend different types of honey, and to change the mix if the price of a particular honey increases. Market for this type of honey is extremely competitive.
- As honey is an international market, price development related to climatic events or regional crises have a greater impact on the downstream sector than the measures. Moreover, as the EU's self-sufficiency ratio is rather low (60%), imports are inevitable to meet overall household and industrial demand in terms of quantity.
- By curbing production costs the measures have helped standard honeys to remain competitive.
- For high-end honey, the measures have provided beekeepers with tools to adapt to market developments, as well as stabilise the market and increase prices.
- Overall, the measures contributed to ensuring that the downstream sector has access to high-end honey, and lower-end quality honey at a competitive price from within the EU.

Main findings

Theme IV: Effects on rural areas and the environment

Effects on rural development

- By contributing to enhancing the economic viability of the sector, the measures have contributed to maintaining beekeeping which remains predominantly a rural activity. Positive externalities, in terms of local employment and activity, are also produced for the entire honey production value chain.
- Greatest contribution in terms of local employment lies in the externalities created through pollination, without which numerous crop and plant producers couldn't carry out their activity.

Effects on the environment

- The measures have an indirect positive impact on the environment, notably by limiting factors causing bee mortality. Measures such as technical assistance, varroa control, and the restocking of hives have been identified as particularly relevant in this respect.
- The measures have to some extent rendered beekeeping practices more sustainable, by encouraging more adequate varroa treatment. Large discrepancies between the practices of professional and non-professional beekeepers remain.

Main findings

Theme V: Efficiency, management and administration

Implementation cost

- Drawing up the apiculture programmes with the measures was not found to be an especially onerous requirement.
- Bureaucracy was not generally identified as a major drawback at national level, though there were Member States where the paperwork and the time taken to decide on applications were felt to be excessive.

Simplification and effectiveness of management

- National and regional Administrations, as well as beekeepers, outlined the need to increase the online availability of procedures, as well as to reduce the time elapsed between finalising the application and actually receiving the support.
- Decentralised management of the measures at regional level in some Member States appeared to have created inefficiencies in the implementation of the measures: differences existed between regions regarding the acceptance of different types of varroasis control products and equipment.

Main findings

Theme VI: Overall coherence with CAP objectives and other measures

Coherence with the CAP as a whole

- The measures are coherent with the CAP as a whole in the sense that they –and the concrete actions undertaken under them at national level- are consistent with the CAP objectives;
- Measures have contributed positively to productivity and earnings of beekeepers, to stabilising markets and assuring availability of supply for the downstream sector and for consumers as well as to ensuring supply at reasonable prices.

Coherence with the agri-environmental measures

- The apiculture support measures are generally coherent with the agri-environmental measures and contribute to the achievement of 2nd CAP pillar objectives.
- Regarding plant protection practices that are considered to be harmful for bees the European Council decided on a temporary ban for neonicotinoids in April 2013.

Coherence with EU programmes on research and initiatives on bee health

- A wide range of EU bodies (including four EC DGs, an EU Agency and the ANSES) have competencies linked to beekeeping and participate in research projects and bee health initiatives.
- No major incoherencies among the policies of these bodies were found.
- There is room for a stronger coordination and larger dissemination of the results of the beekeeping research projects funded by the EU.

Main findings

Theme VI: Overall coherence with CAP objectives and other measures

Coherence with national policies related to bees and private actions

- The CAP measures supporting apiculture are coherent with national policies related to bees, in as much as the later are mainly developed on the basis of the former (little support is provided aside from the National Apiculture Programmes).

Relevance of the measures given the needs as expressed in the Regulation

- The objectives of the Regulation remain broad (“improving the general conditions for the production and marketing of apiculture products”), and the six support measures are wide in potential scope.
- This makes it possible to take into account the diversity of production conditions and yields across EU countries, as well as the dispersion and variety of economic operators, both at the production and marketing stages.

Table of contents

1. Objectives of the evaluation

2. Methodology recap

3. Main findings

4. Recommendations

Recommendations

- Maintain the current six support measures as they are effective as a group and cover the main needs of the sector.
- The formulation of the objectives at EU level must be clearer in order to bring about a more holistic policy approach to the apiculture sector. The different national conditions do need to be taken into account, but clearer and more specified objectives at the EU level will improve the effectiveness and coherence of the measures.
- Greater synergies should be realised between the various bee-related research initiatives funded by the EU. Applied research funded through the CAP apiculture measures must be coherent with other research on bees funded by the EU.
- Marketing efforts promoting honey sales in those Member States where local honey quality is insufficiently valued should be scaled up.
- With a view to providing reliable evidence for decision making, further efforts should be pursued to monitor bee colonies in the EU.
- Promotion of cooperation among beekeepers through the apiculture measures should be strengthened. This would not only centralise resources and reduce costs, but also increase knowledge sharing and the effectiveness and relevance of the apiculture measures.



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