



EUROPEAN COMMISSION
DIRECTORATE-GENERAL FOR AGRICULTURE AND RURAL DEVELOPMENT
Directorate E – Markets
The Director (acting)

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MINUTES

Meeting of the CDG ON ANIMAL PRODUCTION - BEEKEEPING

18/09/2025

Chair: AGRI E.3 – Animal Products

Nature of the meeting: non-public - hybrid (Interactio)

1. List of points discussed

(1) Welcome and adoption of the agenda

After the chair's welcoming words, the agenda was approved.

(2) Honey market presentation

The Commission presented the honey market situation: after a long period of increase, the number of beehives came to a halt (~20 millions), while the number of beekeepers has increased. The proportion of beekeepers with more than 150 colonies remains very modest in Europe, accounting for 3% of the beekeeping population in 2022 and 4% in 2024. The EU remains the second world producer (~279 000 t, 2024) after China, and a major importer. Honey is mainly imported from China, Ukraine and Argentina. In terms of exports, the EU remains a relatively modest player, ranking sixth. Exports are mainly directed to the UK, the US and Switzerland, which together account for 53% of total EU exports.

CDG members emphasised the risk of fraudulent practices on imports from China and Ukraine and a worrying decreasing trend in the number of professional beekeepers.

Focus on intra-EU trade

The Commission gave an overview of intra-EU honey trade: internal dynamics between national markets show a heterogeneous but overall dynamic landscape (153 000 t worth EUR 480 million in 2024). A neighbourhood effect could be identified. The largest trade flows concern a few markets: trade surplus in Eastern MS and deficit in Western/Northern MS, with some exceptions (ES). Four distinct markets clusters could be identified: (1) major hubs, high imports and selling, globally in deficit except for ES

and RO, (2) honey consumption supported by imports, structurally in deficit, except for EL, (3) small markets, limited integration in EU trade flows, dependent on imports for consumption, and (4) trade surplus, limited integration in EU trade flows, except for HU.

(3) Information on the Honey Platform activity

The Commission reported on topics discussed in the first two meetings of the Honey Platform: composition criteria to prevent overheating, methods of analysis to ensure honey authenticity, criteria to ensure pollen is not removed from honey, and traceability of honey from producer to consumer.

CDG members generally welcomed the operation of the Honey Platform, and some suggested more frequent meetings.

(4) State of play of the JRC project for harmonisation and validation of analysis methods (HarmProject)

The Commission's Joint Research Centre (JRC) gave an overview of the project HarmHoney, a three-year project based on an Administrative Arrangement between the JRC and DG AGRI. The aim is the validation of methods for detecting honey adulteration, in particular new types of sugar-based adulterants in honey. Potential markers for honey adulteration were identified as a first step. A measurement method was developed and its interlaboratory validation is scheduled for the end of October. A second task is the collection of honey: more than 2 100 honey samples have been collected, comprising blossom as well as honeydew honeys, monofloral and polyfloral honeys, single country and blended honeys. Also, a limited number of syrups and bee feeding products have been collected. The project is to be completed by February 2027.

Questions were raised on the reliability of the ethanol-based isotope ratio mass spectrometry (IRMS) method and authentication methods based on genomics. The JRC reported that the company promoting the ethanol-IRMS will give a presentation to DG AGRI and the JRC to get a better view on reliability. According to the German and British authorities, genomics-based methods are promising but not validated yet; hence results must be taken with caution. On the suitability of the JRC-developed method for one particular marker, the upcoming interlaboratory comparison will show whether other laboratories achieve better quantification limits.

(5) The Invasive Hornet *Vespa velutina* is Spreading in Europe, Impacting Beekeeping: Insights from an EIP-AGRI project in Germany

An expert from the Landesbetrieb Landwirtschaft Hessen (LLH) Bieneninstitut Kirchhain presented an EIP-AGRI project, co-funded by the EU and the state of Hesse, concerning the invasive hornet *Vespa velutina*. The first nest was recorded in southern Europe in 2004, and since then, it has spread in all directions. The most recent cases have been in Ireland, Spain, Portugal, and Slovakia, as well as parts of Italy. In Hesse, the overall density is still quite low, with densities of more than 10, 12, or even 14 nests per square kilometres. However, beekeepers expect a significant increase in predation pressure because these are large nests, and the State's strategy for combating them is decreasing.

CDG members emphasized the risk of spread of *Vespa orientalis* (ES, CY, EL, IT) and the need for coordination to tackle such invasive species.

(6) International trade: update on Mercosur and Ukraine Free Trade Agreements

The Commission informed about the new legal framework for the EU-Mercosur trade agreement, proposed on September 3rd, including an interim trade agreement and the EU-Mercosur partnership agreement (EMPA). This framework aims to streamline the ratification process and clarify application. The interim agreement focuses on aspects under EU competence, allowing for tariff reductions and the protection of geographical indications. It will provisionally apply once ratified by the EU and Mercosur member countries. The EMPA covers political cooperation requiring national ratification across all EU Member States. A safeguard mechanism allows the temporary halt of imports if a surge threatens local sectors. As a unique feature, safeguards apply also to products within tariff rate quotas, ensuring broader protection. Constant market monitoring will allow identifying risk thresholds, such as a 10% increase in imports or price differentials, potentially triggering investigations.

The Commission also presented the outcome of the review of the EU-Ukraine Deep and Comprehensive Trade Area (DCFTA), which strikes a balance between protecting EU farmers' interests and continuing to support Ukraine's economy. Additional market access is conditioned by Ukraine aligning to a list of production standards by the end of 2028, and a robust safeguard measure was agreed on. In the ensuing discussion, CDG members emphasised the importance of the beekeeping sector for EU agriculture and expressed concerns over the quality and provenance of honey imports from Ukraine.

(7) AOB Commission Proposal on CAP post 2027 for the beekeeping sector

The Commission presented the CAP post 2027 proposal with a focus on beekeeping. The main support for beekeeping will remain through sectoral interventions together with other interventions such as coupled income support (CIS) extended to apiculture, agri-environment and climate actions, support for investments for farmers and risk management tools. Apiculture sectoral support remains mandatory for MS, with a similar broad scope of types of interventions available. National co-financing remains at a minimum of 50%, however MS will determine the Union budgetary allocation for the sector from the ring-fenced envelope for the CAP under the National and Regional Partnership Plan. CIS while mandatory, is up for MS to define the sectors supported with wide flexibility in design and implementation.

Comments focused on concerns that the EU budget for apiculture may drop, on beneficiaries to be defined by MS and on reduced environmental ambition. It was clarified that sectoral support remains mandatory for MS and the main beneficiaries remain beekeepers/beekeeper's associations. The new farm stewardship will ensure compliance with environmental objectives. The proposal is being discussed in Council and Parliament.

(8) Other AOB and end of the meeting

IFOAM brought as AOB the topic on forest fires in Portugal and Spain and their

economic and environmental impact on beekeeping (losses of beehives but also changes in ecosystems). IFOAM emphasized that the challenges - such as disrupted ecosystems and economic losses - are shared across Europe, affecting countries like Spain, France, Italy, and Greece. They advocate for unified European policies on beekeeping, forestry, and pesticide control, supporting the EU Commission's Pollinator Initiative. They stressed the need for collaborative European solutions rather than isolated national responses. While the meeting was technically focused, IFOAM highlighted the importance of political discussions to address these broader challenges effectively. They expressed hope for more time in future meetings to delve deeper into these important topics.

2. Next meeting

The next meeting is foreseen in the first half of 2026 (to be confirmed).

3. List of participants

All organisations were present (see the enclosed list), except:

AVEC, ANIMALHEALTHEUROPE, BEUC, BirdLife Europe, CELCAA, EAPA, EEB, EFA, EFFAB, EFFAT, EFNCP, EFPRA, ELPHA, EMB, EPHA, ERPA, FACEnetwork, FEFAC, FEFANA, FoodDrinkEurope, IPIFF, ORIGINEU and the European Economic and Social Committee as well as the Committee of the Regions.

List of participants– Minutes

CDG ON ANIMAL PRODUCTION BEEKEEPING AND SHEEP/GOATMEAT

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ORGANISATION
BEE LIFE
CEJA
COGECA
COPA
ECVC
EURAF
EUROCOMMERCE
FEEDM
FESASS
IFOAM

AD HOC EXPERT
Landesbetrieb Landwirtschaft Hessen (LLH) Bieneninstitut Kirchhain