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Subject: Position Paper on the Affordability of Food in the European Union

With a Focus on the Honey Sector, Professional Beekeeping, and Pollination Services

Introduction

The affordability of food in the EU is determined by a complex interaction of political, economic, technological, and ecological factors. For the honey sector and for professional beekeepers, these factors are particularly relevant, as honey production and pollination services are increasingly affected by global market distortions, widespread food fraud, ecological decline, and climate instability.

With this position paper, the EPBA provides a structured assessment of the key drivers influencing food affordability and outlines essential policy measures needed to ensure long-term access to genuine, high-quality food while safeguarding the viability of European professional beekeeping and the health of honey bees.

1. Political and Institutional Drivers

1.1 GEOPOLITICAL INSTABILITY AND TRADE DISRUPTIONS

Global crises, wars, and trade fragmentation increase volatility across food supply chains.

In the honey sector, such disruptions redirect large volumes of low-quality or adulterated imports from regions with weak controls into the EU, amplifying risks of food fraud and distorting price formation to the detriment of EU producers.

1.2 LACK OF HARMONISED EU-WIDE QUALITY AND AUTHENTICITY STANDARDS

The absence of mandatory, modern analytical methods (e.g., DNA analysis, isotopes, NMR profiling) makes the EU market highly vulnerable to large-scale honey adulteration.

Artificially low prices resulting from food fraud undermine:

- true food affordability,
 - fair market competition,
 - and consumer trust.
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1.3 COMPETITION AND MARKET REGULATION

Concentrated retail markets exert buyer power that pushes purchase prices below real production costs.

This unbalanced competition structure not only forces producers out of the market, but also undermines the availability of authentic foods in the long term.

2. Economic and Market Drivers

2.1 DUMPING PRICES OF ADULTERATED HONEY AS A PRIMARY PRICE DRIVER

Large-scale honey fraud is the single biggest market distortion in the sector.

Adulterated "honey-like" products are imported at prices no European beekeeper can match.

Consequences include:

- artificially low consumer prices for fraudulent products,
 - disappearance of authentic honey from the market,
 - financial collapse of professional beekeeping businesses,
 - long-term price increases for genuine honey due to supply decline.
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2.2 RISING ENERGY, LABOUR, AND INPUT COSTS

Although costs increase sharply, genuine honey producers cannot pass these costs on due to the unfair competition created by cheap adulterated imports.

This undermines the economic sustainability of professional beekeeping.

2.3 MARKET CONCENTRATION ACROSS THE FOOD CHAIN

Upstream concentration (inputs): limited suppliers drive up prices.

Downstream concentration (processing, retail): dominant players favour the cheapest imports—often adulterated.

This suppresses fair pricing for authentic EU products.

3. Demographic Drivers

3.1 LABOUR SHORTAGES

Professional beekeeping is labour-intensive and requires skilled, seasonal work. Shortages increase production costs and constrain output.

3.2 LACK OF GENERATIONAL RENEWAL

The sector is ageing and failing to attract sufficient new entrants. Without young professionals, EU honey production and pollination services will decline, increasing import dependence and vulnerability.

4. Technology and Innovation Drivers

4.1 MODERN AUTHENTICITY ANALYSIS AS A CORNERSTONE OF FUTURE FOOD AFFORDABILITY

The single most impactful technological intervention is the adoption of advanced analytical tools to detect food fraud. The EPBA calls for:

- mandatory use of state-of-the-art authenticity testing (DNA, isotopes, NMR, marker profiling),
- an EU-wide reference database,
- mandatory testing for imports,
- harmonised enforcement.

This would stabilise markets, protect consumers, and restore fair pricing mechanisms.

4.2 DIGITALISATION AND TRACEABILITY

Digital tools can significantly improve transparency—if implemented consistently. However, online platforms often amplify the race to the lowest price and inadvertently support fraudulent imports.

4.3 SUSTAINABLE PRODUCTION SYSTEMS

Precision agriculture and improved logistics reduce risks and costs, indirectly benefiting pollinator-dependent sectors.

5. Environmental and Biophysical Drivers

5.1 CLIMATE CHANGE

Changing weather patterns disrupt flowering periods, nectar flow, and colony health. This increases production risk and drives up the cost of both honey and pollinator-dependent crops.

5.2 BIODIVERSITY LOSS AND THE POLLINATION CRISIS

Honey bees and wild pollinators are core agricultural production factors. Declines in pollinator populations directly raise production costs for fruit, vegetables, nuts, and oilseeds, reducing affordability.

5.3 LAND-USE PRESSURE AND SHRINKING FORAGE RESOURCES

Intensification, monocultures, and land sealing reduce floral resources. Lower forage availability weakens pollinator populations and reduces agricultural productivity, increasing food prices.

6. Sociocultural Drivers

6.1 SHIFTS IN CONSUMER PREFERENCES

Growing interest in natural, unprocessed foods supports demand for authentic honey. At the same time, economic pressure drives consumers toward ultra-cheap adulterated imports, reinforcing market distortions.

6.2 EROSION OF CONSUMER TRUST DUE TO FOOD FRAUD

Repeated scandals in the honey sector diminish confidence in food quality and challenge the credibility of regulatory systems. This affects purchasing behaviour and undermines fair market dynamics.

7. Key EPBA Policy Recommendations

7.1 ESTABLISH AN EU-WIDE SYSTEM TO COMBAT HONEY ADULTERATION

- Mandatory use of advanced authenticity analysis
- EU reference database for honey profiles
- Risk-based import testing
- Strict penalties for fraud
- Digital traceability across the supply chain

This is the single most important measure for restoring true food affordability.

7.2 STRENGTHEN EUROPEAN PROFESSIONAL BEEKEEPING

- Support schemes for labour, energy, and operational costs
 - Structured training and generational renewal programmes
 - Recognition of beekeeping as a strategic sector for food security
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7.3 PROTECT AND RESTORE BIODIVERSITY

- Pollinator-friendly agricultural policies

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- Expansion of forage areas and ecological focus zones
- Reduced pesticide dependency
- Incentives for habitat restoration

7.4 ENSURE FAIR TRADE AND TRANSPARENT MARKETS

- Enforcement of import controls based on modern science
 - Clear and mandatory origin labelling for honey
 - Regulation against unfair trading practices
 - Intervention tools to stabilise markets in times of crisis
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7.5 PROMOTE THE AFFORDABILITY OF AUTHENTIC FOOD

Food affordability must not be confused with “cheap food at any cost.” Artificially cheap adulterated imports may benefit short-term price levels but undermine:

- food quality,
- consumer trust,
- local production,
- and Europe’s long-term food security.

Authentic, nutritious food must remain accessible—not replaced by fraudulent substitutes.

Conclusion

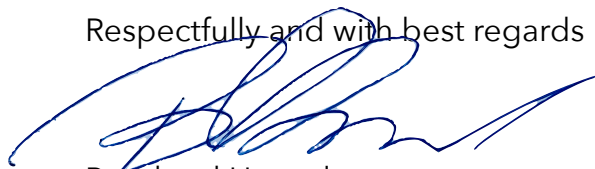
A sustainable, fair, and affordable food system in the EU is inseparable from a strong professional beekeeping sector and healthy pollinator populations.

The honey sector is a sentinel of systemic weaknesses in food markets – especially regarding fraud, market distortion, and ecological decline.

The EPBA calls upon EU institutions and Member States to adopt the measures outlined in this paper to:

- safeguard the affordability of genuine food,
- ensure the survival of European beekeeping,
- protect biodiversity,
- and secure Europe’s long-term food supply.

Respectfully and with best regards



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