



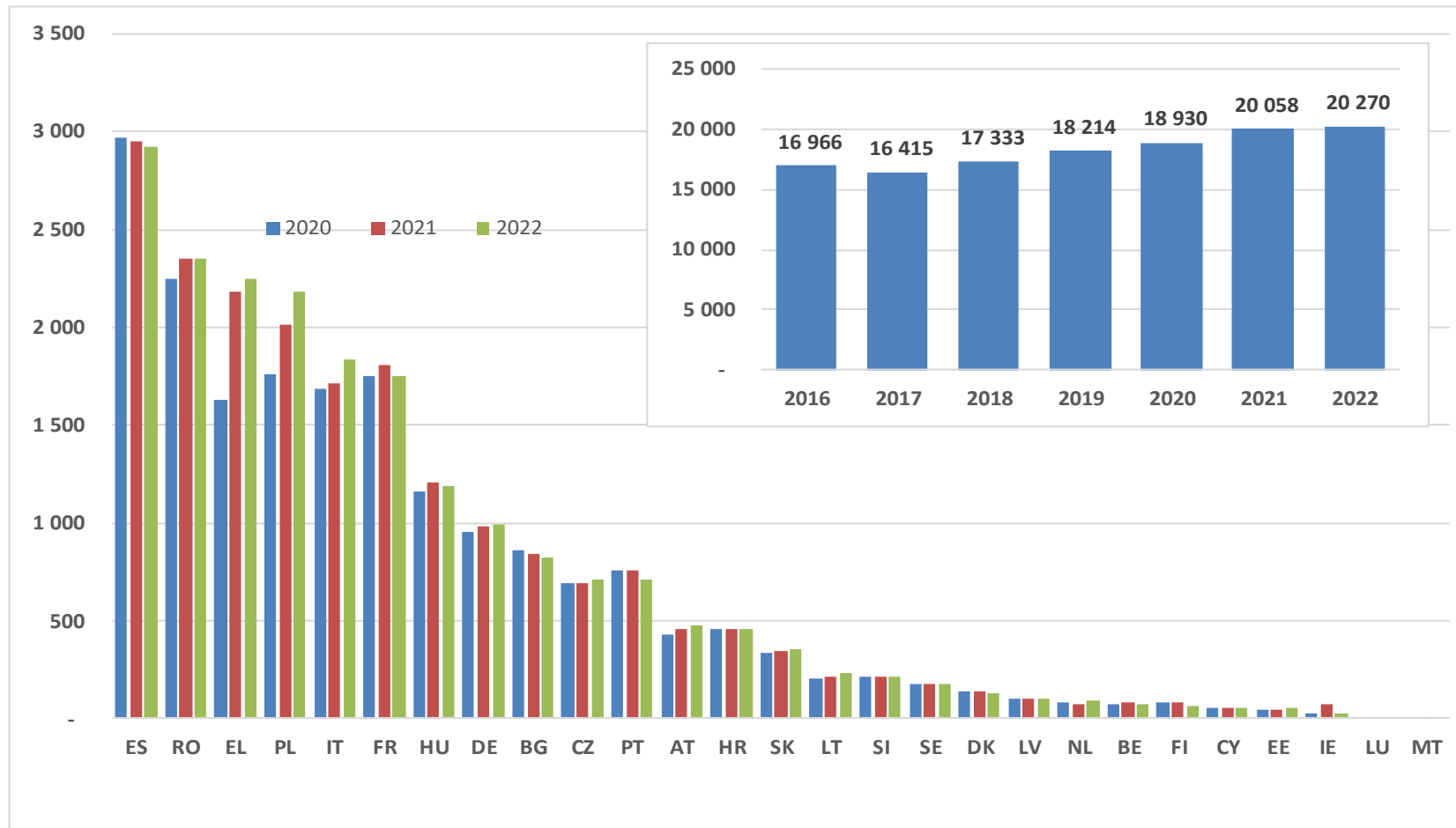
Honey Market Presentation

Expert Group for Agricultural Markets

23 November 2023



Evolution of the number of hives (in thousand)



Source : Commission Implementing Regulation (EU) 2022/1475

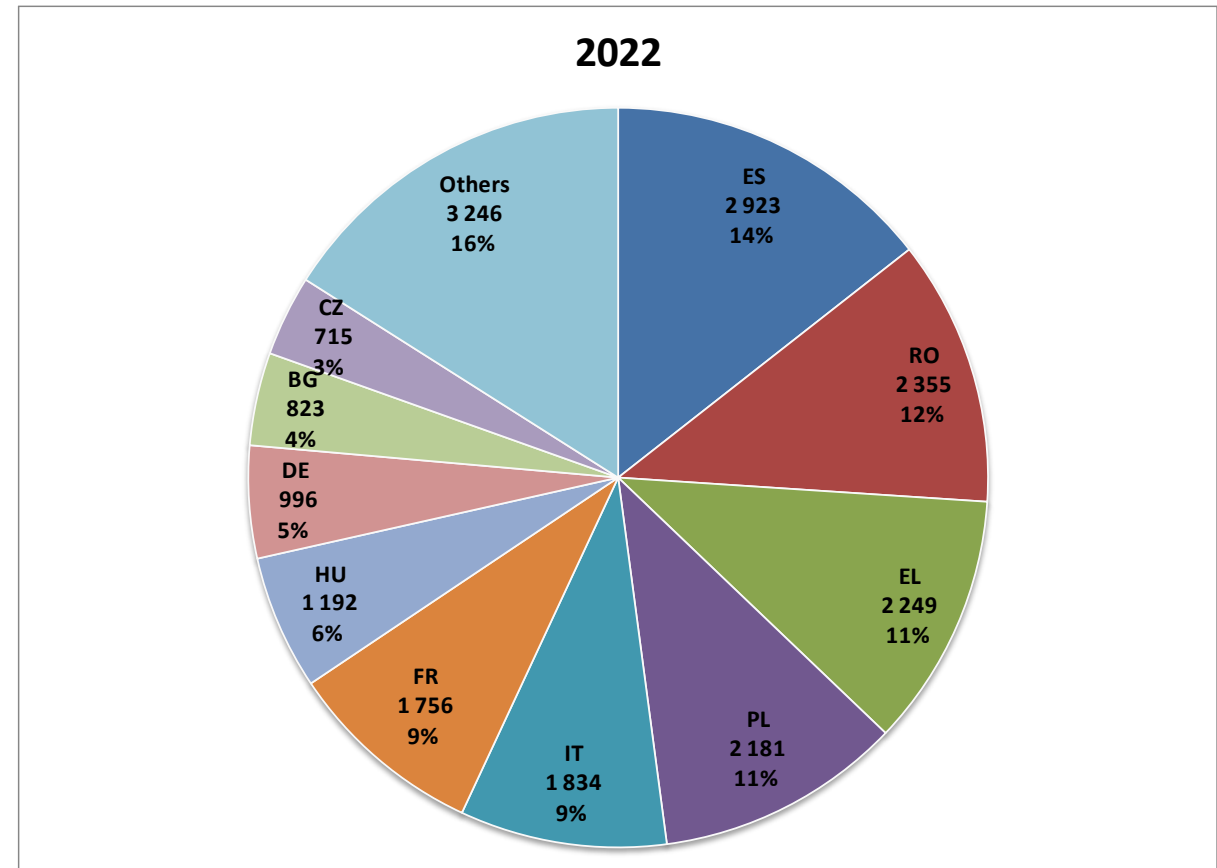


Number (in thousand) and share of beehives per MS



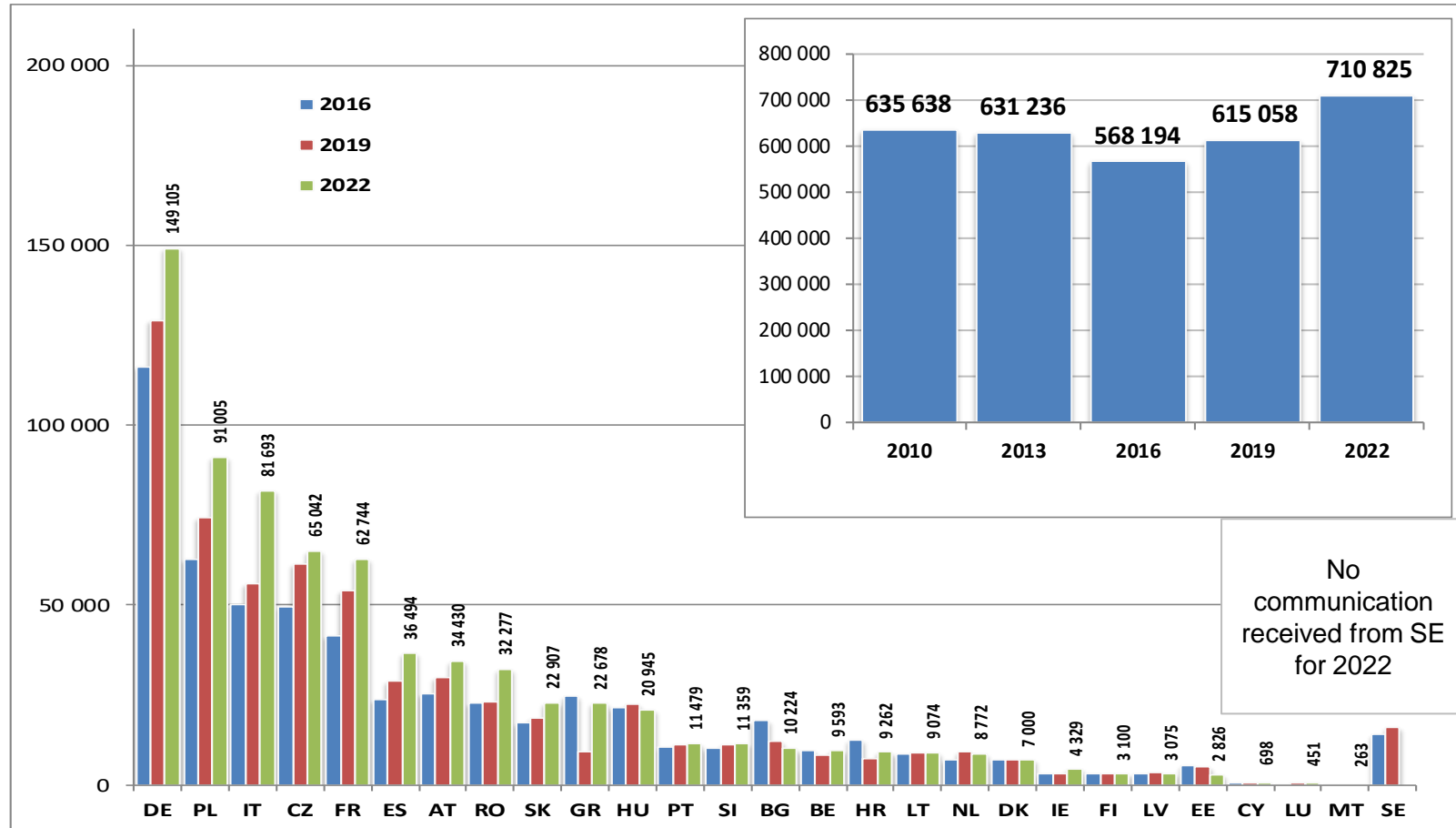
In thousand hives	2020	2021	2021/2020	2022	2022/2021
ES	2 967	2 953	↓ -0.5%	2 923	↓ -1.0%
RO	2 247	2 353	↑ +4.7%	2 355	↑ +0.1%
EL	1 631	2 183	↑ +33.8%	2 249	↑ +3.0%
PL	1 766	2 013	↑ +14.0%	2 181	↑ +8.3%
IT	1 687	1 717	↑ +1.8%	1 834	↑ +6.8%
FR	1 751	1 808	↑ +3.3%	1 756	↓ -2.9%
HU	1 163	1 207	↑ +3.8%	1 192	↓ -1.3%
DE	951	982	↑ +3.3%	996	↑ +1.4%
BG	863	838	↓ -2.9%	823	↓ -1.8%
CZ	694	695	↑ +0.1%	715	↑ +3.0%
PT	754	758	↑ +0.5%	710	↓ -6.3%
AT	426	456	↑ +7.0%	480	↑ +5.2%
HR	461	460	↓ -0.1%	461	↑ +0.3%
SK	335	344	↑ +2.6%	355	↑ +3.2%
LT	209	216	↑ +3.4%	230	↑ +6.4%
SI	214	213	↓ -0.2%	213	↑ +0.2%
SE	179	179	→ +0.0%	179	→ +0.0%
DK	144	140	↓ -2.6%	126	↓ -10.3%
LV	104	104	↓ -0.0%	105	↑ +1.2%
NL	80	78	↓ -2.3%	90	↑ +15.5%
BE	76	82	↑ +8.1%	75	↓ -9.1%
FI	82	86	↑ +4.0%	78	↓ -8.4%
CY	58	55	↓ -5.8%	57	↑ +3.6%
EE	48	50	↑ +4.8%	55	↑ +9.6%
IE	27	27	↑ +0.5%	27	↑ +0.1%
LU	8	7	↓ -16.8%	8	↑ +16.6%
MT	5	6	↑ +17.6%	6	↓ -0.6%
EU	18 930	20 011	↑ +5.7%	20 280	↑ +1.3%

Source : Commission Implementing Regulation (EU) 2022/1475





Evolution of the number of beekeepers

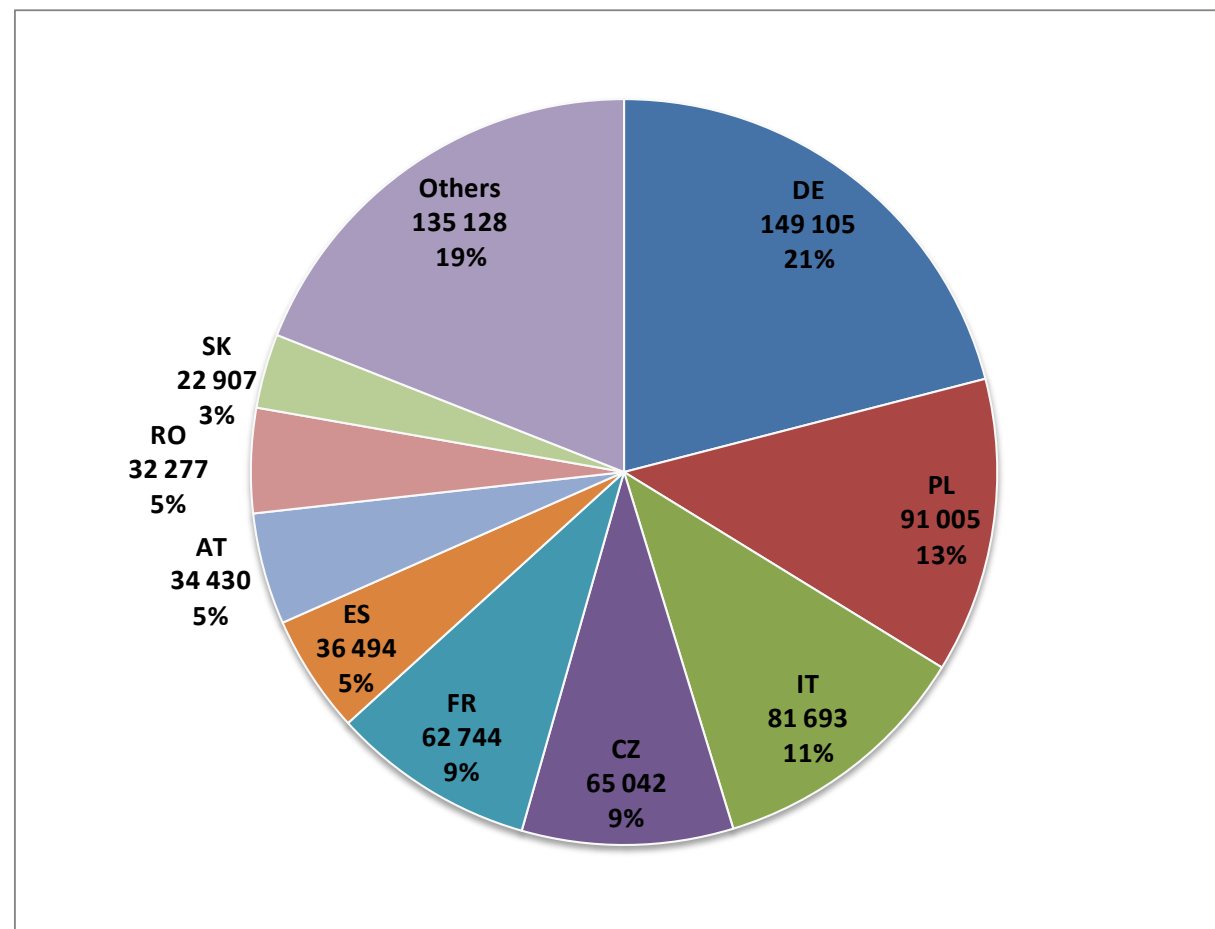


Source: Before 2019 – Commission Implementing Regulation (EU)2015/1368; after 2022 – Commission Implementing Regulation (EU)2022/1475

Number of beekeepers

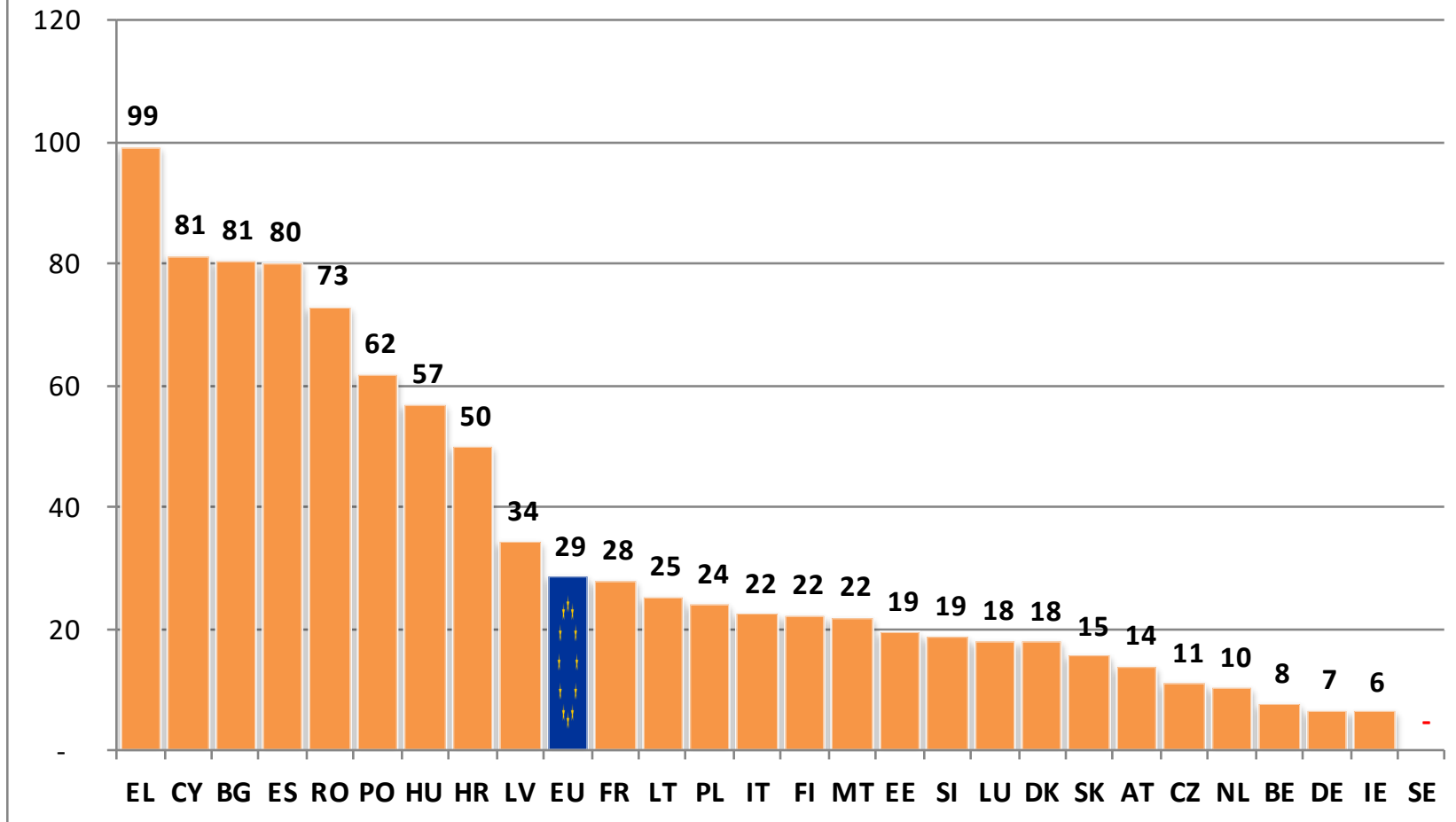


	2019	2022		
DE	129 048	149 105	↑	+15.5%
PL	74 302	91 005	↑	+22.5%
IT	56 059	81 693	↑	+45.7%
CZ	61 572	65 042	↑	+5.6%
FR	53 953	62 744	↑	+16.3%
ES	28 786	36 494	↑	+26.8%
AT	29 745	34 430	↑	+15.8%
RO	23 161	32 277	↑	+39.4%
SK	18 586	22 907	↑	+23.2%
GR	9 266	22 678	↑	+144.7%
HU	22 447	20 945	↓	-6.7%
PT	11 301	11 479	↑	+1.6%
SI	11 349	11 359	↑	+0.1%
BG	12 260	10 224	↓	-16.6%
BE	8 223	9 593	↑	+16.7%
HR	7 283	9 262	↑	+27.2%
LT	8 950	9 074	↑	+1.4%
NL	9 345	8 772	↓	-6.1%
DK	7 000	7 000	→	+0.0%
IE	3 300	4 329	↑	+31.2%
FI	3 200	3 100	↓	-3.1%
LV	3 341	3 075	↓	-8.0%
EE	5 215	2 826	↓	-45.8%
CY	676	698	↑	+3.3%
LU	456	451	↓	-1.1%
MT	234	263	↑	+12.4%
SE	16 000	#N/A		#N/A
EU	615 058	710 825	↑	+15.6%



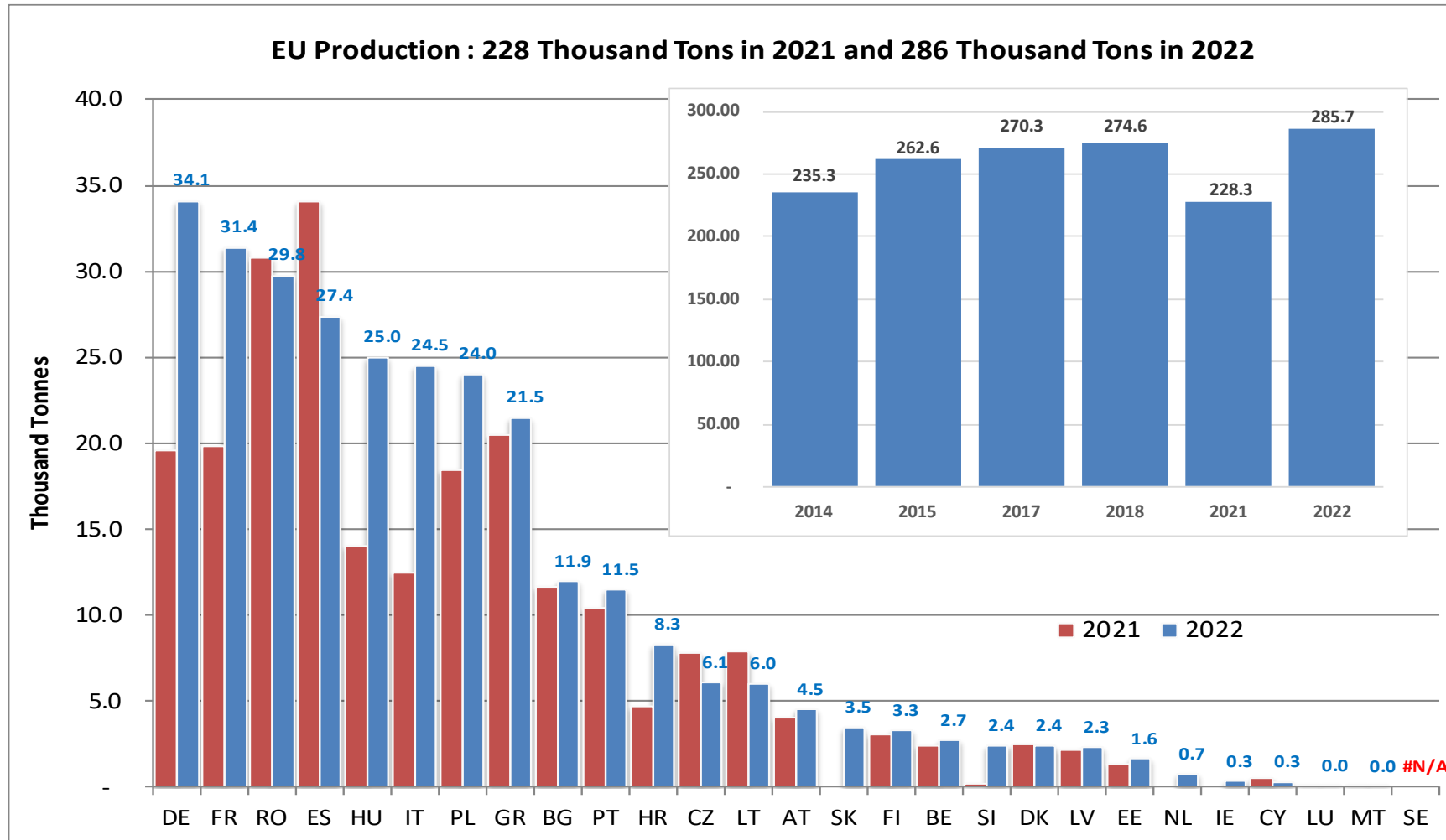
Source: Before 2019 – Commission Implementing Regulation (EU)2015/1368; after 2022 – Commission Implementing Regulation (EU) 2022/1475

Average Number of Hives per Beekeeper (2022)



Source: Commission Implementing Regulation (EU)2022/1475

EU Honey Production



Data for 2021 and 2022 are preliminary – may be subject to change !

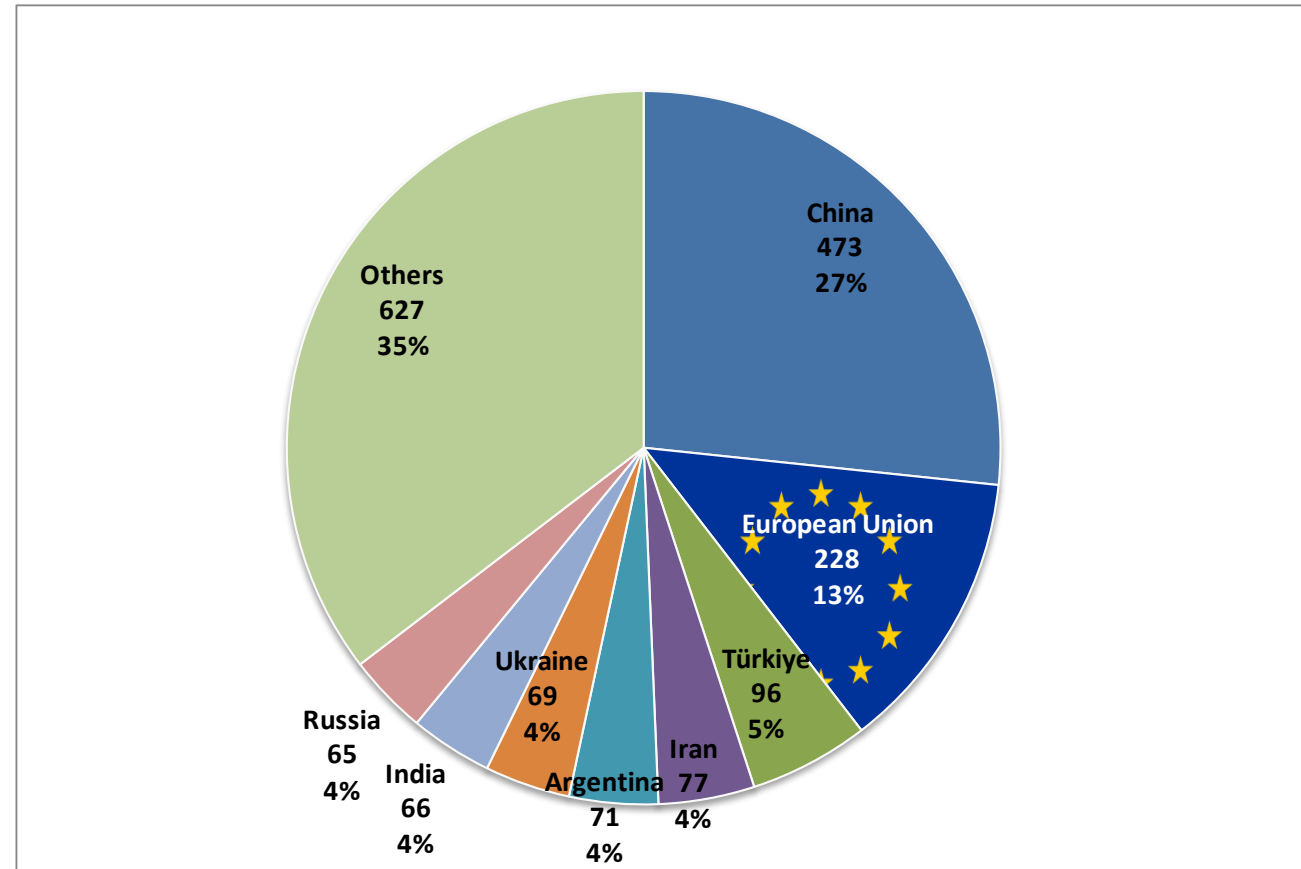


World Production of Honey per Country (1 000 T)

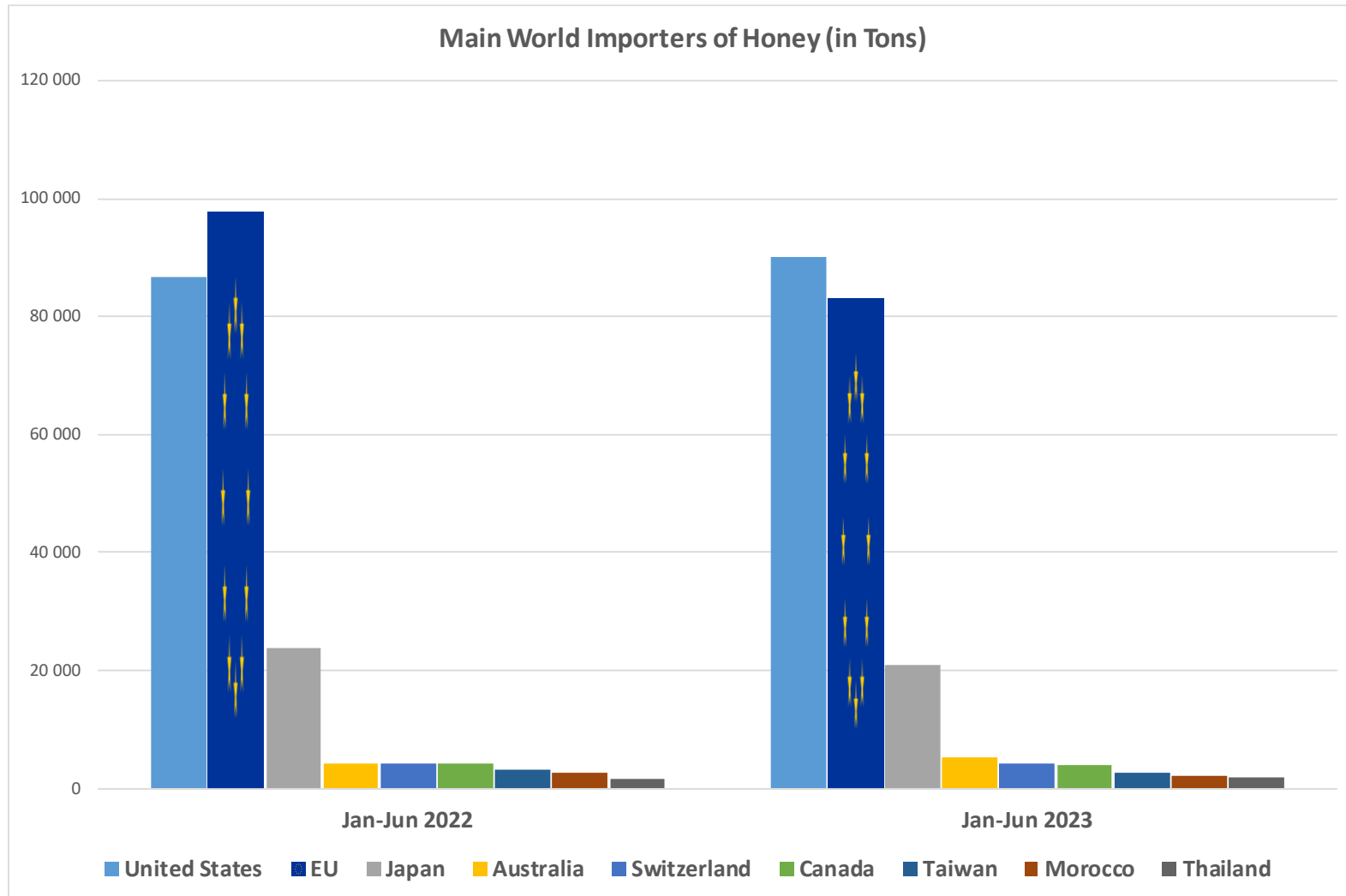


	2020	2021	Share of World Production
China, mainland	458	473	27%
European Union (27)	230	228	13%
Türkiye	104	96	5%
Iran (Islamic Republic of)	74	77	4%
Argentina	72	71	4%
Ukraine	68	69	4%
India	65	66	4%
Russian Federation	66	65	4%
Mexico	54	62	4%
United States of America	67	57	3%
Brazil	52	56	3%
Canada	38	41	2%
United Republic of Tanzania	31	32	2%
Republic of Korea	30	30	2%
Angola	23	23	1%
Viet Nam	21	22	1%
New Zealand	27	21	1%
Kenya	18	17	1%
Central African Republic	17	17	1%
Uzbekistan	13	14	1%
Ethiopia	13	13	1%
Uruguay	14	13	1%
Thailand	12	12	1%
Other	197	198	11%
	1 766	1 772	

Source : FAO



Main World Importers of Honey



Source : Global Trade Atlas



EU Imports of Honey by Origin (in Tons)



In tons

	2020		2021		2022		Jan-Aug 2023		Compared to Jan-Aug 2022	
	% Extra EU		% Extra EU		% Extra EU		% Extra EU			
China	36 790	21.0%	48 139	27.7%	68 421	35.9%	41 574	38.9%	↓	-12.8%
Ukraine	54 802	31.3%	53 836	31.0%	46 094	24.2%	27 366	25.6%	↓	-11.1%
Argentina	22 816	13.0%	14 396	8.3%	19 446	10.2%	12 460	11.7%	↓	-10.3%
Mexico	17 393	9.9%	15 486	8.9%	13 797	7.2%	7 332	6.9%	↓	-12.1%
Turkey	3 186	1.8%	4 676	2.7%	7 472	3.9%	1 547	1.4%	↓	-70.9%
Cuba	6 993	4.0%	7 052	4.1%	6 571	3.5%	3 861	3.6%	↓	-27.2%
Brazil	6 079	3.5%	7 934	4.6%	5 760	3.0%	2 189	2.0%	↓	-52.7%
Vietnam	598	0.3%	924	0.5%	6 383	3.4%	2 993	2.8%	↓	-18.8%
Others	26 256	15.0%	21 068	12.1%	16 502	8.7%	7 509	7.0%	↓	-32.8%
Extra EU	174 912		173 511		190 444		106 830		↓	-18.3%
% Change			↓ -0.8%	↑ +9.8%						

Source : Eurostat Comext

EU Imports of Honey by Origin (in Thousand Euros)



	2020		2021		2022		Jan-Aug 2023		Compared to Jan-Aug 2022	
	% Extra EU		% Extra EU		% Extra EU		% Extra EU			
Ukraine	83 696	23.3%	101 595	25.0%	121 080	24.0%	61 755	25.6%	↓	-23.3%
China	50 613	14.1%	65 739	16.2%	108 353	21.5%	58 054	24.1%	↓	-23.4%
Argentina	50 121	13.9%	39 412	9.7%	64 276	12.7%	31 894	13.2%	↓	-29.3%
Mexico	38 600	10.7%	44 634	11.0%	50 597	10.0%	23 294	9.7%	↓	-21.7%
New Zealand	30 759	8.5%	32 663	8.0%	32 618	6.5%	13 002	5.4%	↓	-37.1%
Brazil	13 209	3.7%	21 982	5.4%	20 791	4.1%	7 249	3.0%	↓	-55.7%
Cuba	12 806	3.6%	14 653	3.6%	17 464	3.5%	10 324	4.3%	↓	-25.8%
Turkey	10 623	3.0%	11 830	2.9%	19 643	3.9%	5 642	2.3%	↓	-57.8%
Others	69 534	19.3%	74 296	18.3%	69 537	13.8%	29 750	12.3%	↓	-33.2%
Extra EU	359 961		406 804		504 357		240 962		↓	-29.1%
% Change			↑ +13.0%		↑ +24.0%					

EU Imports from Third Countries by Member State (in Tons)



	2021		2022		Jan-Aug 2023		Compared to Jan-Aug 2022	
	% Extra EU		% Extra EU		% Extra EU			
DE	51 886	29.9%	52 034	27.3%	27 323	25.6%	↓	-28.3%
BE	25 645	14.8%	33 245	17.5%	21 126	19.8%	↓	-0.9%
PL	32 114	18.5%	27 348	14.4%	14 796	13.9%	↓	-12.6%
ES	14 480	8.3%	18 158	9.5%	10 384	9.7%	↓	-21.3%
PT	7 079	4.1%	10 115	5.3%	7 196	6.7%	↓	-3.6%
FR	6 771	3.9%	6 475	3.4%	4 468	4.2%	↑	+15.8%
NL	5 035	2.9%	9 750	5.1%	3 841	3.6%	↓	-52.4%
IT	4 301	2.5%	7 079	3.7%	3 122	2.9%	↓	-20.0%
IE	2 467	1.4%	4 319	2.3%	2 478	2.3%	↓	-23.8%
RO	4 126	2.4%	3 795	2.0%	2 364	2.2%	↓	-10.1%
GR	683	0.4%	1 233	0.6%	1 805	1.7%	↑	+252.8%
Others	2 000	1.2%	16 894	8.9%	7 927	7.4%	↓	-31.4%
EU	173 511		190 444		106 830		↓	-18.3%

Source : Eurostat Comext

EU Imports of Honey from Ukraine by Member State (in Tons)

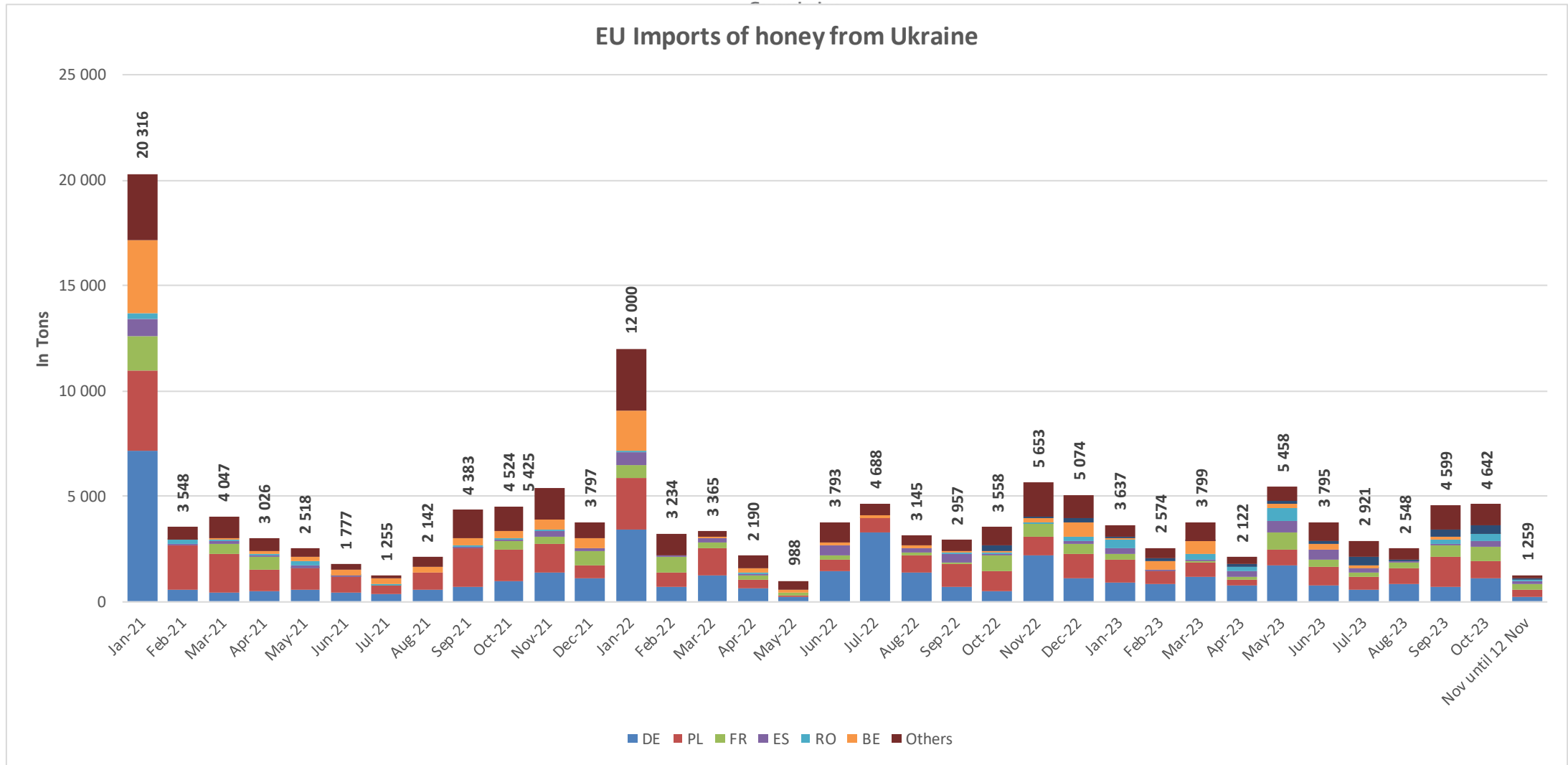


	2019		2020		2021		2022		Jan-Aug 2023		% change	
		% of EU		% of EU		% of EU		% of EU		% of EU	Jan-Aug	
DE	11 108	24.9%	11 692	21.3%	11 692	21.7%	11 739	25.5%	7 282	26.6%	↓	-23.2%
PL	12 597	28.3%	21 677	39.6%	16 918	31.4%	10 591	23.0%	5 549	20.3%	↓	-16.6%
FR	6 085	13.7%	4 203	7.7%	4 337	8.1%	4 298	9.3%	2 169	7.9%	↓	-7.7%
ES	1 420	3.2%	1 246	2.3%	1 863	3.5%	2 280	4.9%	1 961	7.2%	↑	+19.5%
BE	6 911	15.5%	6 160	11.2%	6 225	11.6%	3 850	8.4%	1 620	5.9%	↓	-42.6%
RO	23	0.1%	2 094	3.8%	1 169	2.2%	536	1.2%	1 547	5.7%	+++	
HU	0	0.0%	0	0.0%	1 806	3.4%	1 842	4.0%	1 490	5.4%	↑	+63.1%
IT	869	2.0%	959	1.8%	1 294	2.4%	2 371	5.1%	1 392	5.1%	↑	+19.3%
GR	0	0.0%	0	0.0%	0	0.0%	516	1.1%	1 094	4.0%		
DK	1 727	3.9%	1 797	3.3%	1 614	3.0%	1 082	2.3%	887	3.2%	↑	+9.0%
BG	323	0.7%	421	0.8%	518	1.0%	973	2.1%	646	2.4%	↑	+24.9%
CZ	1 174	2.6%	1 074	2.0%	2 673	5.0%	2 412	5.2%	458	1.7%	↓	-72.8%
AT	501	1.1%	630	1.1%	428	0.8%	435	0.9%	450	1.6%	↑	+3.6%
SK	812	1.8%	1 015	1.9%	996	1.9%	1 441	3.1%	248	0.9%	↓	-56.7%
NL	0	0.0%	0	0.0%	432	0.8%	721	1.6%	207	0.8%	↓	-71.3%
LT	792	1.8%	1 483	2.7%	1 630	3.0%	885	1.9%	201	0.7%	↓	-73.6%
HR	0	0.0%	41	0.1%	123	0.2%	62	0.1%	122	0.4%	+++	
SI	62	0.1%	40	0.1%	41	0.1%	41	0.1%	41	0.1%	↑	+100.0%
LV	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%		
EE	121	0.3%	270	0.5%	79	0.1%	20	0.0%	0	0.0%	↓	-100.0%
IE	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%		
EU	44 523		54 802		53 836		46 094		27 366		↓	-11.1%

Source : Eurostat Comext

EU Imports from Ukraine by Member State (in Tons)

recent preliminary data



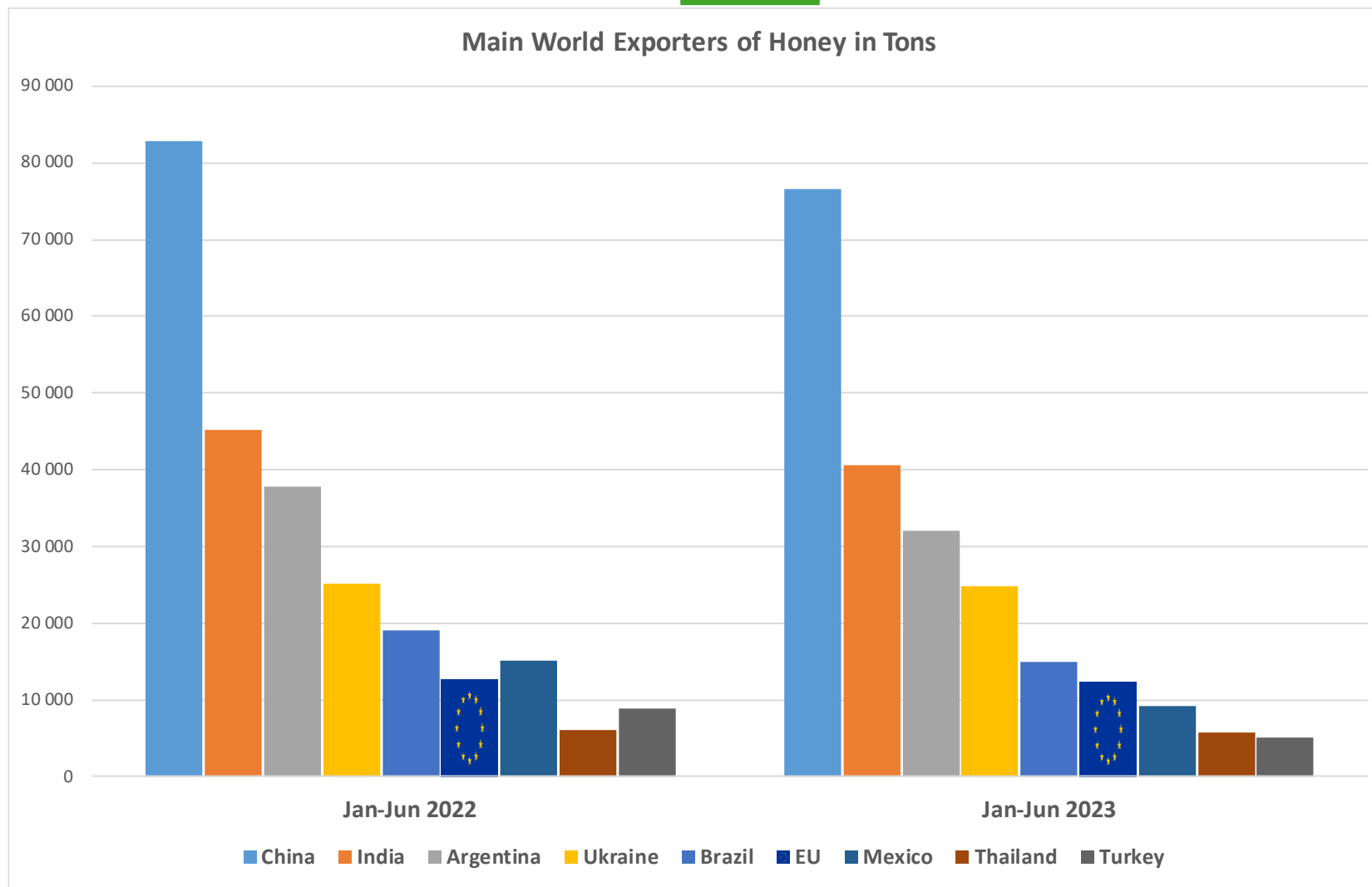
EU Average Unit Value of Imported Honey (€/Kg) by Origin



	2019	2020	2021	2022	Jan-Aug 2023	compared to Jan-Aug 2022
China	1.40	1.38	1.37	1.58	1.40	↓ -12.1%
Ukraine	1.68	1.53	1.89	2.63	2.26	↓ -13.8%
Argentina	2.28	2.20	2.74	3.31	2.56	↓ -21.2%
Mexico	2.56	2.22	2.88	3.67	3.18	↓ -10.9%
Cuba	2.11	1.83	2.08	2.66	2.67	↑ +1.8%
Vietnam	1.39	1.33	1.71	2.01	1.78	↓ -8.7%
Brazil	2.67	2.17	2.77	3.61	3.31	↓ -6.3%
Chile	2.71	2.72	3.50	4.03	3.13	↓ -20.7%
Turkey	3.46	3.33	2.53	2.63	3.65	↑ +44.8%
Moldova	2.69	2.26	3.24	3.57	3.44	↑ +1.7%
United Kingdom	4.29	4.23	4.13	4.36	4.40	↑ +4.3%
Uruguay	1.99	1.78	2.69	3.27	2.47	↓ -22.9%
Nicaragua	3.06	2.75	3.13	3.92	3.55	↓ -8.4%
New Zealand	28.52	29.13	28.10	21.06	27.59	↑ +31.3%
Russia	2.21	2.11	2.11	2.07	1.89	↓ -4.2%
Extra EU	2.13	2.06	2.34	2.65	2.26	↓ -13.2%
Extra EU (excl. NZ)	2.02	1.89	2.17	2.50	2.14	↓ -12.9%

Source : Eurostat Comext

Main World Exporters of Honey



Source : Global Trade Atlas



EU Exports of Honey by Destination (in Tons)



In tons

	2020		2021		2022		Jan-Aug 2023		Compared to Jan-Aug 2022	
	% Extra EU		% Extra EU		% Extra EU		% Extra EU			
United Kingdom	8 016	25.5%	4 576	18.0%	4 549	18.2%	2 881	17.9%	↑	+10.3%
Saudi Arabia	3 817	12.1%	3 306	13.0%	2 432	9.7%	2 129	13.2%	↑	+26.0%
Switzerland	4 034	12.8%	3 908	15.4%	3 894	15.6%	2 114	13.1%	↓	-19.5%
USA	3 408	10.8%	2 793	11.0%	3 183	12.7%	2 066	12.8%	↓	-4.0%
Japan	2 154	6.9%	2 131	8.4%	2 810	11.2%	1 750	10.9%	↑	+7.5%
Israel	680	2.2%	613	2.4%	980	3.9%	780	4.8%	↑	+35.5%
U.A.Emirates	1 201	3.8%	932	3.7%	912	3.6%	597	3.7%	↓	-16.0%
Morocco	565	1.8%	516	2.0%	560	2.2%	565	3.5%	↑	+31.2%
Others	7 563	24.1%	6 648	26.1%	5 701	22.8%	3 223	20.0%	↓	-7.8%
Extra EU	31 437		25 423		25 024		16 104		↑	+1.2%
% Change			↓	-19.1%	↓	-1.6%				

Source : Eurostat Comext

EU Exports of Honey by Destination (in Thousand Euros)



	2020		2021		2022		Jan-Aug 2023		Compared to Jan-Aug 2022	
		% Extra EU		% Extra EU		% Extra EU		% Extra EU		
United Kingdom	30 028	18.3%	22 579	15.4%	23 375	15.4%	14 736	15.5%	↑	+6.5%
Saudi Arabia	24 550	15.0%	19 975	13.6%	17 161	11.3%	14 584	15.4%	↑	+23.4%
Switzerland	22 902	14.0%	22 756	15.5%	24 648	16.2%	13 968	14.7%	↓	-9.7%
USA	19 664	12.0%	18 634	12.7%	20 580	13.5%	12 949	13.6%	↓	-6.2%
Japan	14 068	8.6%	14 658	10.0%	18 488	12.2%	10 545	11.1%	↓	-7.1%
U.A.Emirates	9 270	5.7%	7 547	5.2%	7 447	4.9%	4 855	5.1%	↓	-16.4%
Canada	3 795	2.3%	5 478	3.7%	5 969	3.9%	2 414	2.5%	↓	-20.1%
Israel	1 916	1.2%	1 719	1.2%	3 032	2.0%	2 066	2.2%	↑	+16.2%
Others	37 578	22.9%	33 096	22.6%	31 294	20.6%	18 768	19.8%	↓	-8.5%
Extra EU	163 770		146 443		151 994		94 885		↓	-2.6%
% Change			↓ -10.6%		↑ +3.8%					

EU exports to Third Countries by Member State (in Tons)



	2021		2022		Jan-Aug 2023		Compared to Jan-Aug 2022	
	% Extra EU		% Extra EU		% Extra EU			
ES	6 923	27.2%	6 789	27.1%	4 408	27.4%		-2.3%
DE	6 302	24.8%	5 191	20.7%	3 660	22.7%		+1.4%
RO	916	3.6%	1 349	5.4%	1 184	7.4%		+37.5%
HU	1 756	6.9%	2 242	9.0%	1 026	6.4%		-26.6%
EL	1 160	4.6%	1 268	5.1%	929	5.8%		+38.0%
FR	1 749	6.9%	1 604	6.4%	879	5.5%		-21.8%
PL	980	3.9%	1 598	6.4%	823	5.1%		+57.9%
AT	925	3.6%	853	3.4%	596	3.7%		+8.7%
IT	762	3.0%	1 007	4.0%	583	3.6%		-16.3%
BG	707	2.8%	547	2.2%	310	1.9%		-15.5%
BE	723	2.8%	402	1.6%	301	1.9%		+30.2%
Others	9 443	37.1%	2 174	8.7%	1 406	8.7%		+2.1%
EU	25 423		25 024		16 104			+1.2%

Source : Eurostat Comext

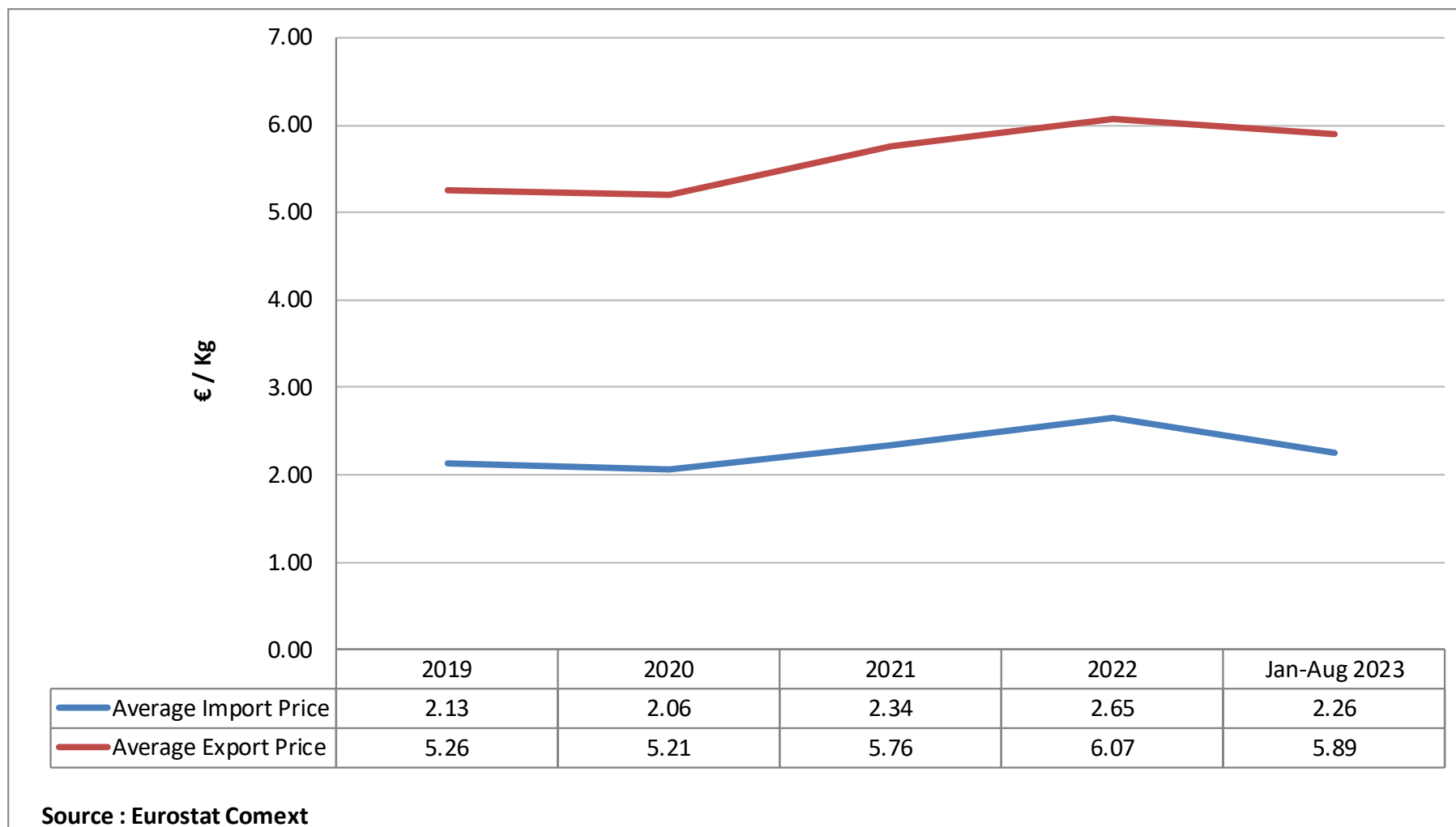
EU Average Unit Value of Exported Honey (€/kg) by Destination



	2019	2020	2021	2022	Jan-Aug 2023	Compared to Jan-Aug 2022
Switzerland	5.41	5.68	5.82	6.33	6.61	↑ +12.1%
United Kingdom	3.98	3.75	4.93	5.14	5.12	↓ -3.4%
USA	6.29	5.77	6.67	6.47	6.27	↓ -2.2%
Saudi Arabia	7.53	6.43	6.04	7.06	6.85	↓ -2.0%
Japan	5.75	6.53	6.88	6.58	6.03	↓ -13.6%
U.A. Emirates	7.51	7.72	8.10	8.16	8.14	↓ -0.4%
Canada	3.89	3.86	4.08	4.61	4.78	↓ -6.7%
Israel	2.84	2.82	2.81	3.09	2.65	↓ -14.2%
Morocco	2.80	2.57	3.43	4.00	3.15	↓ -19.1%
Norway	5.39	5.27	5.74	6.47	5.43	↓ -15.4%
Hong Kong	6.99	6.79	6.62	7.66	7.79	↑ +1.8%
Bosnia-Herz.	4.78	4.58	4.07	4.22	5.10	↑ +28.0%
China	7.44	6.32	5.87	6.99	5.10	↓ -26.9%
Philippines	6.01	5.89	6.37	6.11	7.11	↑ +12.4%
India	5.78	5.35	5.97	6.16	6.11	↓ -0.4%
Extra EU	5.26	5.21	5.76	6.07	5.89	↓ -3.7%

Source : Eurostat Comext

Import and Export Unit Values



Summary of EU honey market situation (1)



- EU remains second world producer (~285 000 tons, 2022) after China
- EU honey production increased in 2022 compared to 2021 harvest
- Longer term increase in number of beehives slowed down (20,3 millions, 2022)



Summary of EU honey market situation (2)



- EU remains only ~63% self-sufficient in honey
- Imports needed to cover EU domestic consumption
- China and Ukraine remain key suppliers
- EU honey trade balance keeps largely negative: Imports>Exports



Where to find data:



EUROPA SITE MARKETS

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

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Thank you



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