



Honey Market Presentation

**Civil Dialogue Group
21 November 2017**



Overview of EU honey market (1)

- EU second world producer (250 000 tons) after China
- Total number of beehives: 17 millions
- Total number of beekeepers decreasing: 600 000
- Small sector but essential for agriculture for pollinisation



Overview of EU honey market (2)

- EU is only 60% self-sufficient in honey
- Imports needed to cover EU domestic consumption
- Main supplier for imported honey: China (around 40% of EU imports)
- EU honey trade balance largely negative: Imports > Exports

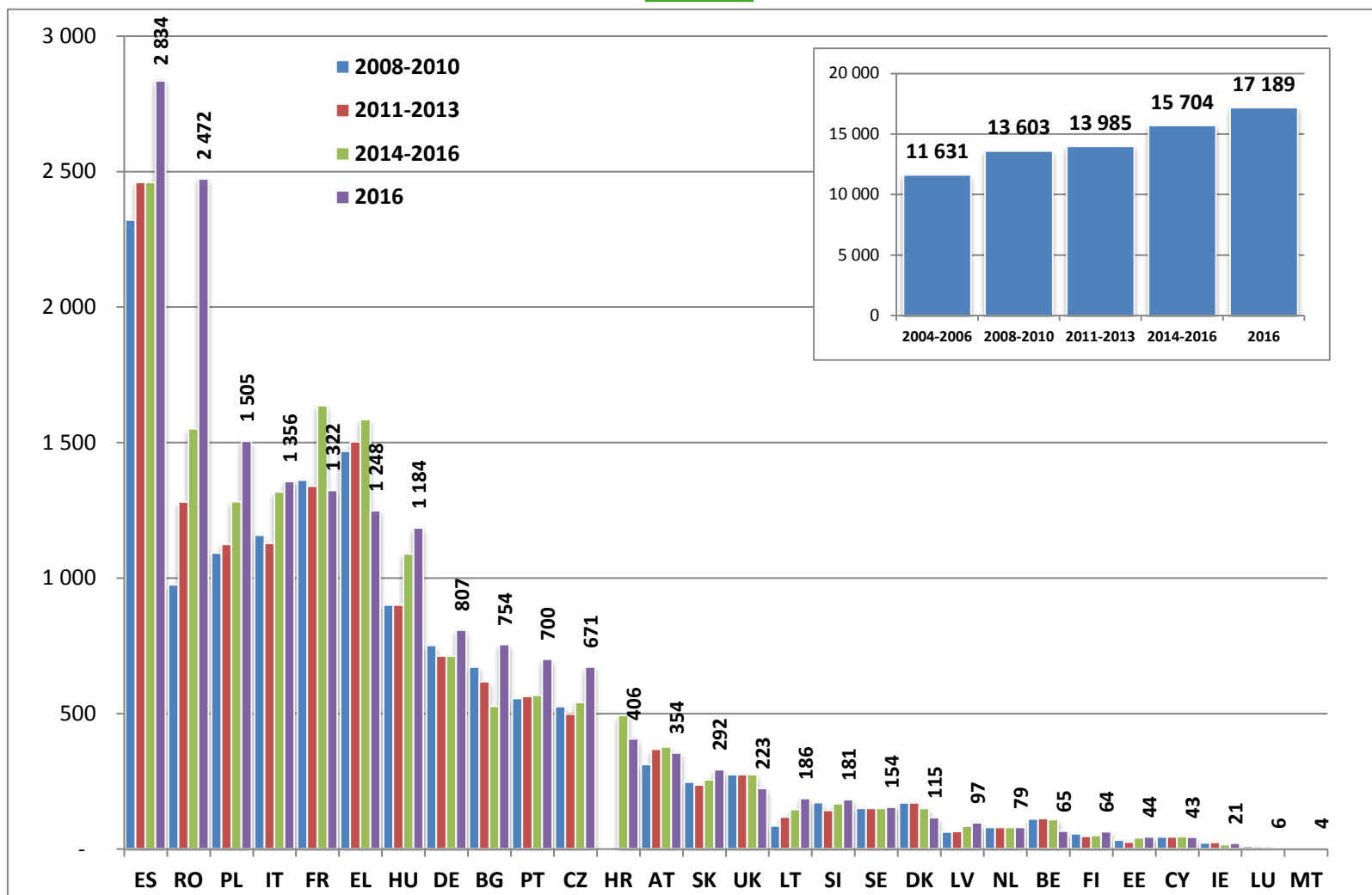


Number of hives



	2003	2004-2006	2008-2010	2011-2013	2014-2016	2016	
ES	2 398	2 465	2 321	2 459	2 459	2 834	+15.2%
RO			975	1 280	1 550	2 472	+59.5%
PL		949	1 092	1 123	1 281	1 505	+17.5%
IT	1 100	1 100	1 157	1 128	1 317	1 356	+3.0%
FR	1 297	1 150	1 361	1 339	1 636	1 322	-19.2%
EL	1 380	1 388	1 468	1 502	1 584	1 248	-21.2%
HU		873	900	900	1 089	1 184	+8.8%
DE	900	893	751	712	711	807	+13.5%
BG		-	672	617	526	754	+43.4%
PT	633	590	555	563	567	700	+23.5%
CZ		478	526	498	541	671	+24.1%
HR	-	-	-	-	492	406	-17.5%
AT	344	327	311	368	376	354	-6.0%
SK		192	246	236	255	292	+14.6%
UK	274	274	274	274	274	223	-18.5%
LT		84	85	118	145	186	+28.4%
SI		143	171	143	167	181	+8.7%
SE	145	145	150	150	150	154	+2.7%
DK	155	160	170	170	150	115	-23.1%
LV		54	62	64	84	97	+15.4%
NL	80	80	80	80	80	79	-1.1%
BE	100	111	110	112	108	65	-39.6%
FI	42	47	56	46	50	64	+28.0%
EE		51	33	25	41	44	+7.4%
CY		46	44	44	45	43	-4.0%
IE	20	20	22	24	16	21	+36.2%
LU	10	11	9	8	8	6	-27.4%
MT		2	2	3	3	4	+22.1%
EU 15/25/27/28	8 877	11 631	13 603	13 985	15 704	17 189	+9.5%

Number of hives (in thousand)

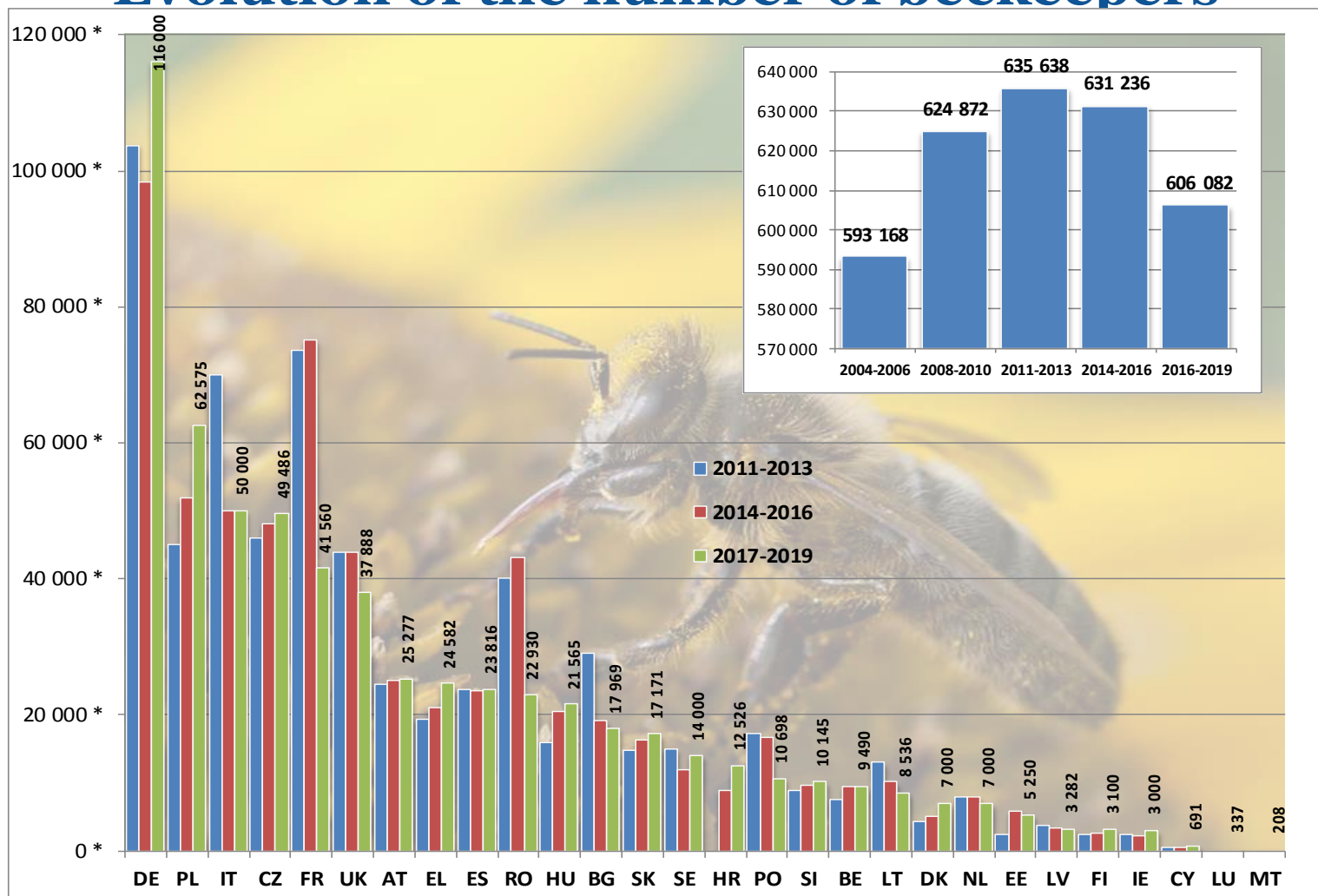


Number of beekeepers

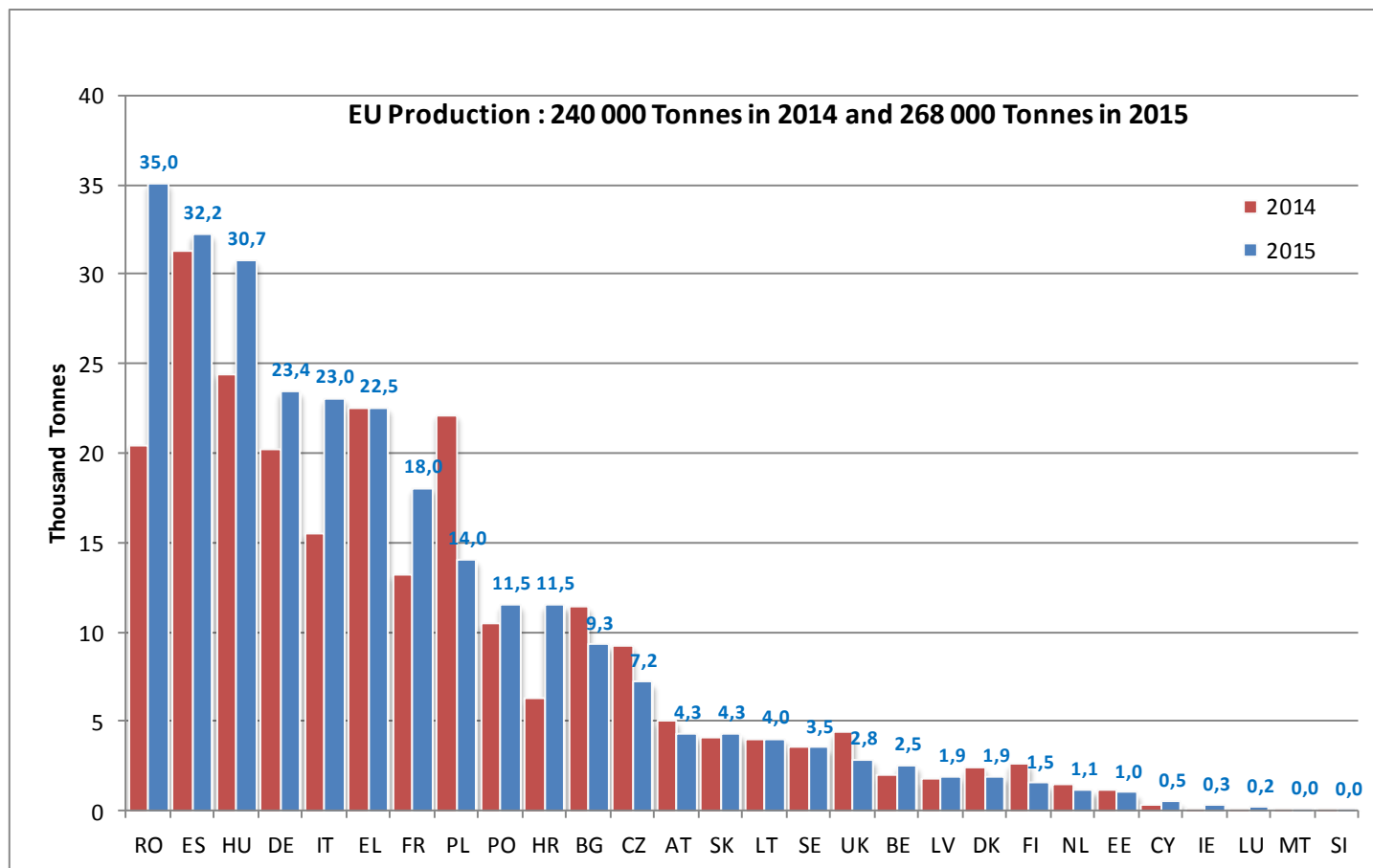


	2003	2004-2006	2008-2010	2011-2013	2014-2016	2017-2019
DE	103 600	103 600	103 600	103 600 *	98 297	116 000
PL		42 800	39 410	44 999	51 778	62 575
IT	75 000	50 000	70 000	70 000	50 000	50 000
CZ		49 734	48 678	46 033	48 132	49 486
FR	100 000	100 000	69 600	73 500	75 000	41 560
UK	43 600	43 600	43 900	43 900	43 900	37 888
AT	25 027	24 421	23 000	24 451	25 099	25 277
EL	22 000	19 560	19 814	19 392	21 031	24 582
ES	27 420	24 606	23 265	23 816	23 473	23 816
RO			36 800	40 000 *	43 200	22 930
HU		15 302	16 000	16 000	20 410	21 565
BG			29 097 *	29 097	19 179	17 969
SK		18 123	14 339	14 699	16 338	17 171
SE	14 000	14 000	15 000	15 000	12 000	14 000
HR					8 953	12 526
PO	26 000	22 000	15 267	17 291	16 774	10 698
SI		7 955	7 620	8 838	9 638	10 145
BE	11 000	7 715	7 000	7 600	9 500	9 490
LT		11 000	10 923	13 000	10 132	8 536
DK	6 000	5 000	4 278	4 300	5 000	7 000
NL	10 000	10 000	10 000	8 000	8 000	7 000
EE		7 600	7 400	2 416	5 934	5 250
LV		8 300	3 300	3 700	3 346	3 282
FI	4 200	4 200	3 300	2 500	2 700	3 100
IE	2 300	2 200	2 200	2 388	2 326	3 000
CY		634	544	588	550	691
LU	650	650	369	348	331	337
MT		168	168	182	215	208
EU	470 797	593 168	624 872	635 638	631 236	606 082

Evolution of the number of beekeepers



EU Honey Production

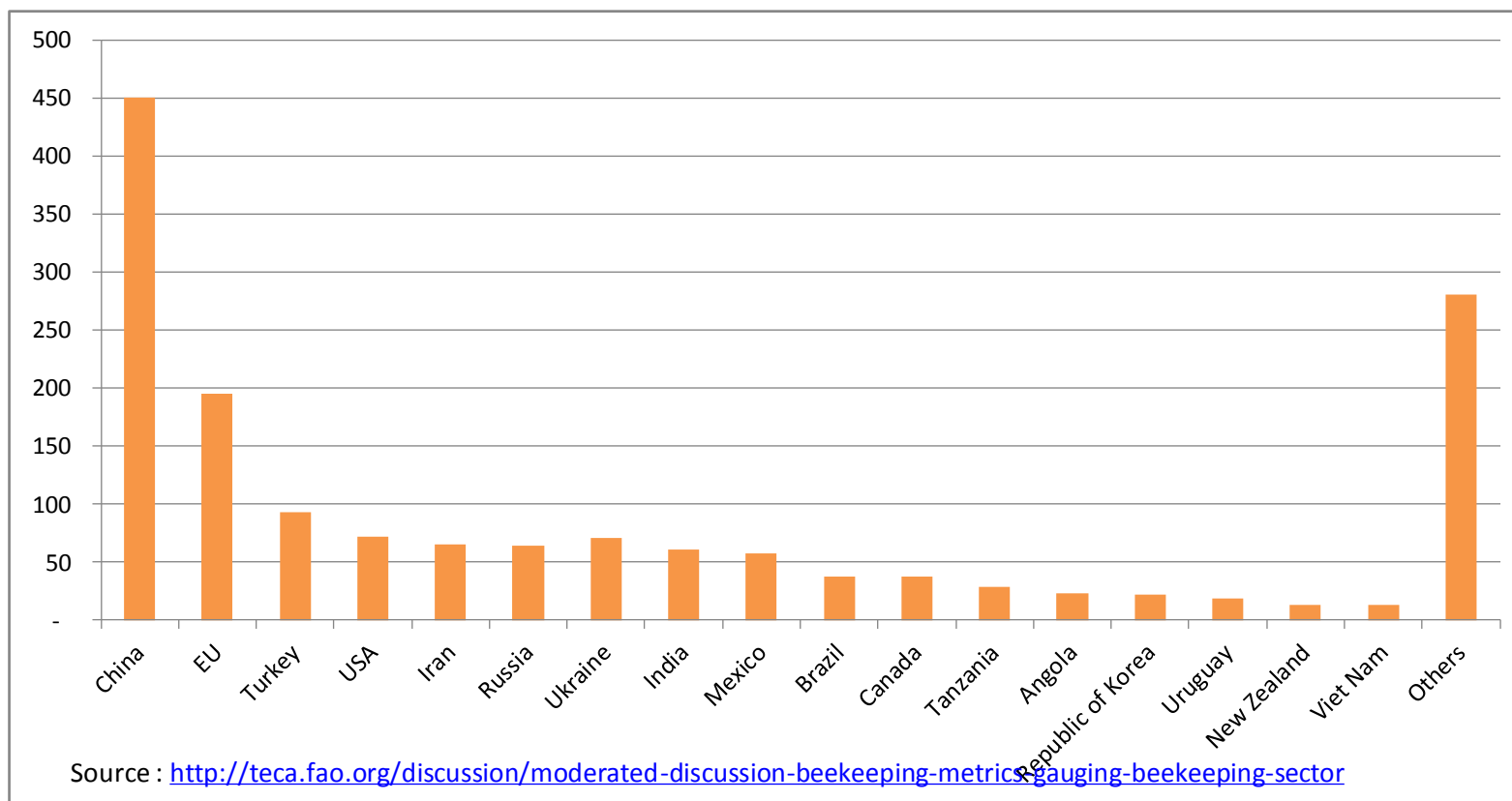


World Production of Honey per Country (1 000 T)

	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
China	254	268	295	298	300	338	357	407	407	409	446	462	463	474
EU	182	178	200	187	182	191	195	189	194	180	225	195	212	161
Turkey	60	75	70	74	82	84	74	81	82	81	94	89	95	104
USA	84	78	82	83	73	70	67	74	66	80	67	65	68	81
Iran	27	28	15	29	35	36	47	41	46	51	51	71	75	76
Russia	53	49	48	53	52	56	54	57	54	52	60	65	68	75
Ukraine	60	51	54	58	71	76	68	75	74	71	70	70	74	67
India	52	52	52	52	52	52	51	55	55	60	60	60	61	62
Mexico	59	59	57	57	51	56	55	60	56	56	58	59	57	61
Brazil	22	24	30	32	34	36	35	38	39	38	42	34	35	38
Canada	35	37	35	34	36	48	31	29	32	37	36	41	35	37
Tanzania	27	27	27	28	28	28	28	27	28	29	28	29	30	31
Angola	24	23	23	23	24	23	23	23	23	23	23	23	23	23
Republic of Korea	22	20	18	16	24	23	26	26	28	23	18	22	22	23
Uruguay	10	10	10	13	10	13	16	10	8	15	19	20	20	20
New Zealand	9	5	12	9	10	10	10	12	13	13	9	10	18	18
Viet Nam	7	11	13	11	14	17	16	10	12	12	12	12	13	14
Australia	19	18	16	17	17	18	18	18	16	15	10	12	14	13
Bulgaria	5	5	9	8	11	10	6	11	10	11	10	9	10	9
Uzbekistan	2	3	2	2	2	2	2	3	3	3	4	5	7	9
Thailand	4	4	4	4	5	4	8	8	8	8	8	8	9	9
Cuba	7	6	7	6	4	7	6	5	5	5	7	7	7	8
Other	200	237	237	244	283	294	265	249	238	241	267	300	275	109
	1 224	1 267	1 314	1 337	1 398	1 492	1 458	1 509	1 496	1 510	1 624	1 669	1 689	1 520

Source : FAO

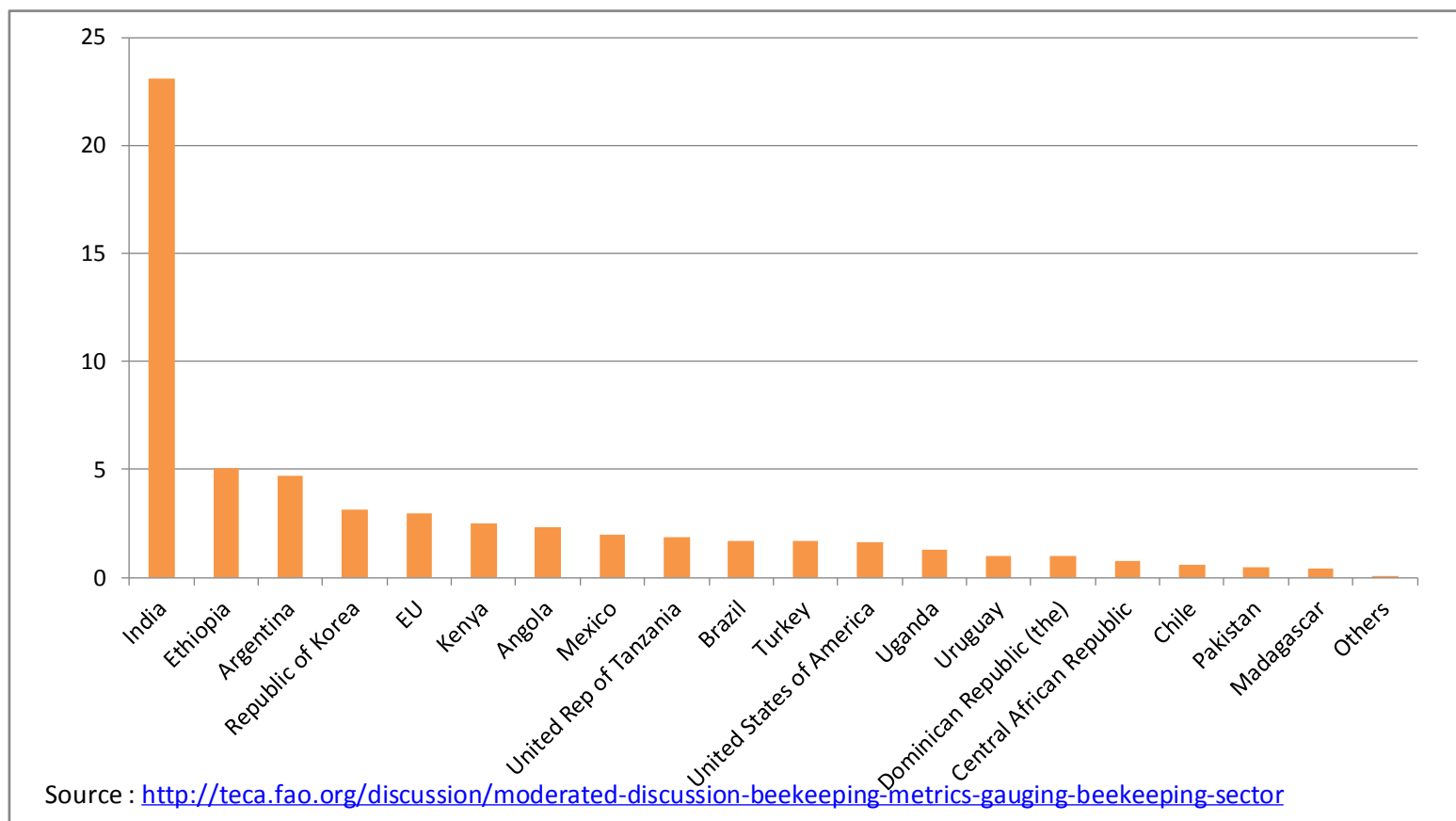
World Production of Honey Average 2010-2014 (1 000 T)



World Production of Beewax - per Country (in Tons)

	2009	2010	2011	2012	2013	2014
India	21.200	23.000	23.000	23.100	23.200	22.550
Ethiopia	4.600	5.150	5.000	5.000	5.000	5.344
Argentina	4.700	4.700	4.700	4.700	4.814	4.960
Turkey	4.385	4.148	4.235	4.222	4.241	4.053
Republic of Korea	3.976	3.396	3.063	3.063	3.063	4.018
EU	3.654	3.737	3.727	3.661	3.918	3.948
Kenya	2.510	2.500	2.500	2.500	2.500	2.500
Angola	2.300	2.300	2.300	2.300	2.300	2.303
Tanzania	1.830	1.830	1.830	1.850	1.870	1.869
Mexico	2.218	2.016	1.966	1.868	2.010	1.862
Brazil	1.750	1.700	1.850	1.650	1.650	1.700
USA	1.600	1.600	1.600	1.605	1.610	1.613
Uganda	1.220	1.250	1.300	1.352	1.282	1.289
Dominican Republic	960	959	1.038	1.050	1.070	1.090
Uruguay	1.000	1.000	1.000	1.057	1.084	1.071
Central African Republic	735	750	775	799	781	790
Chile	600	600	600	605	611	614
Pakistan	462	462	462	462	463	560
Madagascar	405	405	410	410	405	409
Senegal	290	300	300	310	310	319
Cameroon	290	300	300	300	298	299
Australia	320	307	299	292	286	280
New Zealand	263	261	268	268	273	274
Jamaica	250	250	250	250	250	250
El Salvador	210	215	215	217	218	217
South Sudan				180	180	180
Burundi	175	175	175	175	175	176
Paraguay	150	150	150	153	157	157
Egypt	173	169	180	175	163	151
Sierra Leone	130	132	132	135	138	141
Guinea	125	130	132	134	137	138
Syria	127	132	129	131	134	136
Guinea-Bissau	100	100	100	100	100	100
Ecuador	90	90	90	91	94	94
Costa Rica	84	85	85	86	87	86
Mozambique	80	80	82	80	80	82
Venezuela	80	80	80	80	77	78
Guatemala	71	72	73	73	75	70
Haiti	69	69	69	69	69	69
Tunisia	67	62	62	63	65	65
Mali	70	70	70	65	64	65
Morocco	100	100	100	83	64	65
Rwanda	41	41	41	46	48	47
Timor-Leste	40	40	40	40	40	40
Zambia	25	25	25	30	35	36
Honduras	19	19	20	20	14	15
World	63.723	65.136	65.003	64.900	65.503	66.173

World Production of Beeswax Average 2009-2013 (1 000 T)

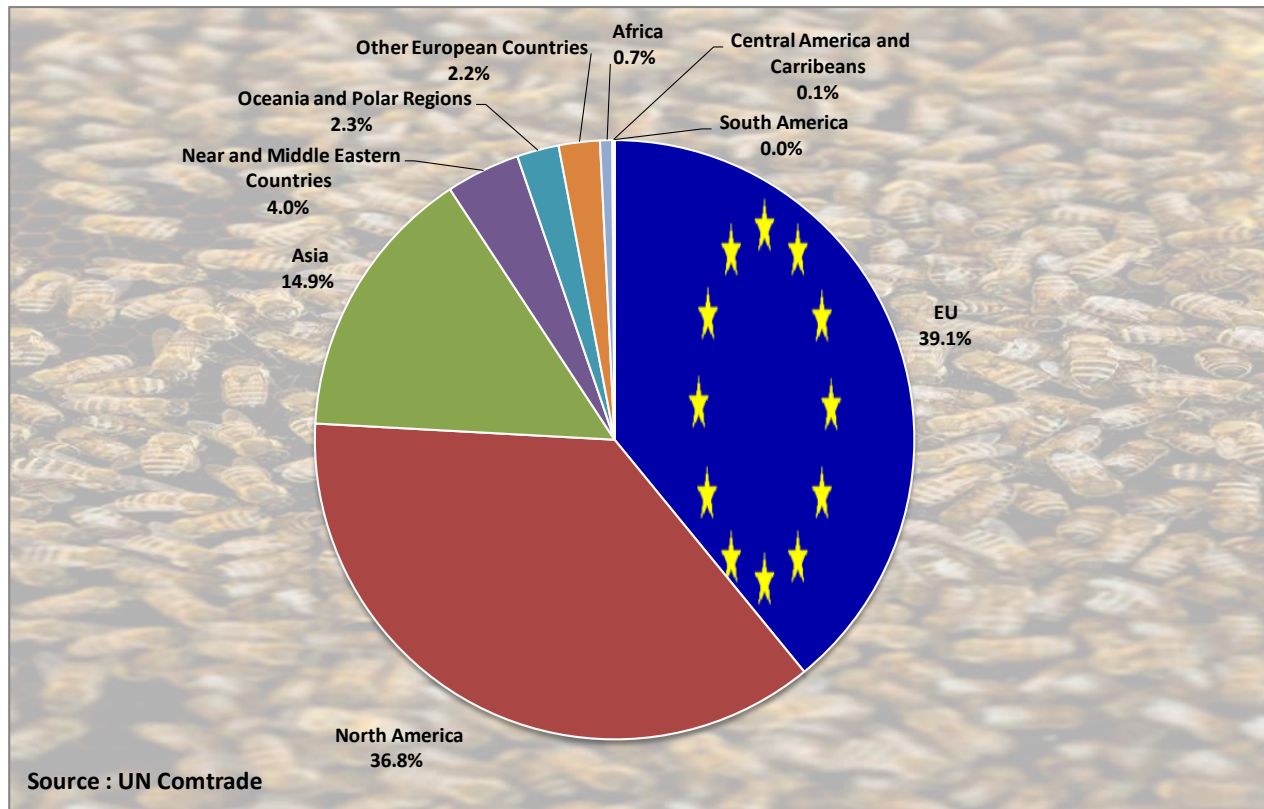


World Imports of Honey

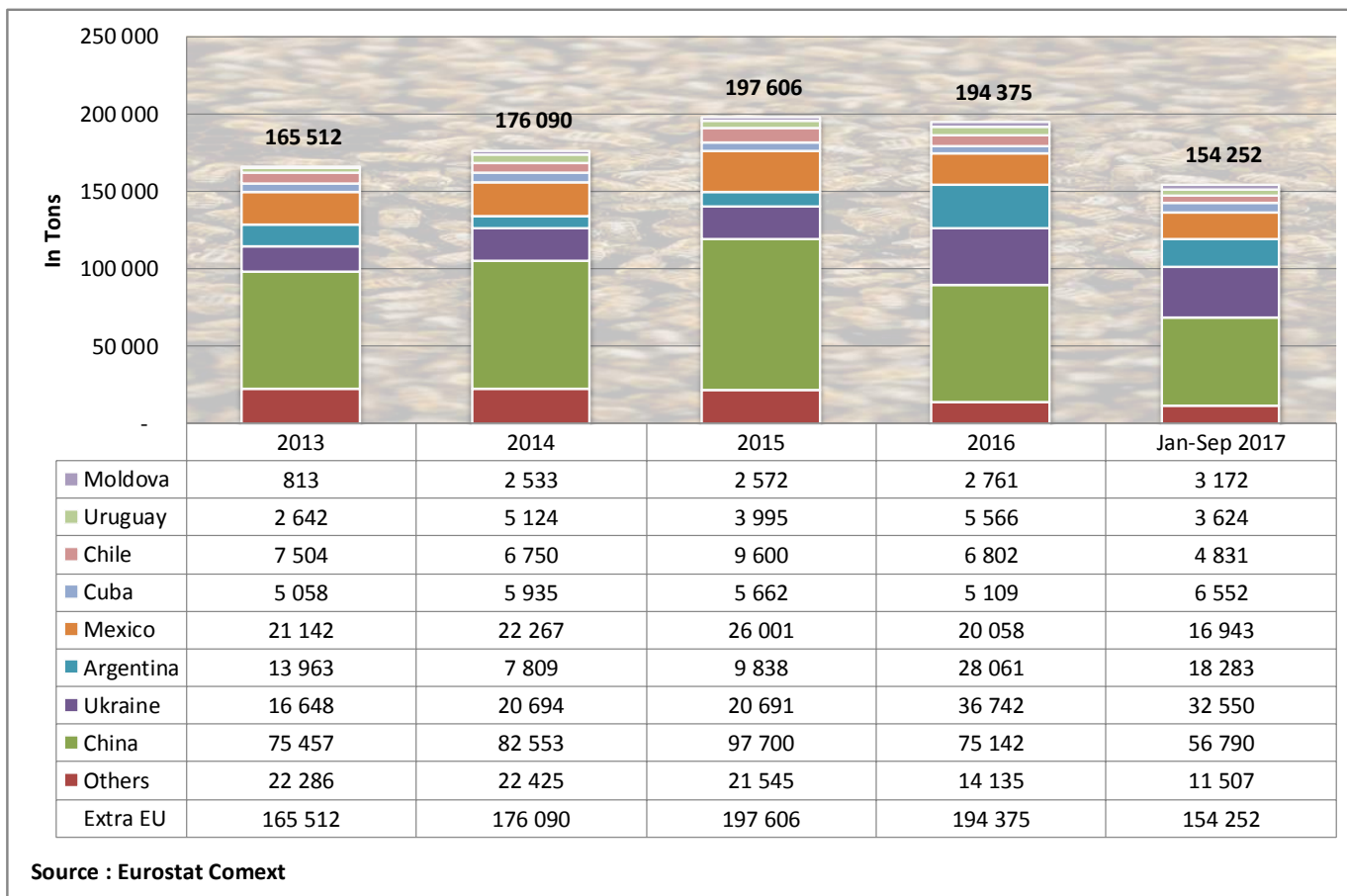
	2009		2010		2011		2012		2013		2014		2015		2016	
	Tons	1 000 €	Tons	1 000 €	Tons	1 000 €	Tons	1 000 €	Tons	1 000 €	Tons	1 000 €	Tons	1 000 €	Tons	1 000 €
European Union	148 227	304 291	147 101	305 402	149 340	310 537	165 512	337 667	176 090	377 332	197 606	497 879	194 375	432 853	154 252	343 965
North America	100 350	178 707	117 460	240 867	133 433	298 176	144 474	346 597	158 628	394 945	172 349	460 554	182 612	574 891	173 136	408 235
<i>of which</i> USA	95 473	165 548	114 127	230 017	130 494	288 200	141 016	334 671	153 065	375 585	165 945	438 269	175 203	545 316	166 477	381 718
Asia	69 711	109 376	81 429	146 765	64 958	148 696	64 832	178 815	68 936	199 310	77 630	232 123	79 182	306 988	76 168	311 452
<i>of which</i> Japan	36 919	62 543	39 950	75 617	40 584	84 529	36 823	82 022	39 030	87 545	37 870	90 474	36 222	106 032	48 445	142 477
China	2 420	3 817	2 189	7 310	2 468	9 271	3 368	20 398	4 857	32 326	5 792	44 129	6 517	67 442	6 032	65 739
Near and Middle Eastern Countries	16 985	42 293	17 577	52 724	18 633	52 693	25 208	75 849	28 078	85 614	34 610	114 180	31 499	104 194	13 922	49 871
Other European Countries	11 403	32 552	15 224	44 897	14 505	43 701	13 262	40 972	11 860	39 270	11 035	40 597	11 036	45 983	10 210	40 981
Africa	5 181	7 325	7 207	9 126	8 154	7 966	7 737	12 602	7 695	10 253	7 899	13 541	6 328	14 511	9 074	19 568
Oceania and Polar Regions	5 213	13 571	3 789	11 828	3 625	13 180	4 403	15 669	2 956	15 626	7 776	30 276	11 232	50 749	10 015	41 671
Central America and Carribeans	665	1 410	785	1 798	765	1 655	646	1 593	405	1 115	689	1 786	612	2 094	579	1 735
South America	389	919	599	1 334	473	1 085	581	1 371	387	942	319	832	268	816	246	599
Total	358 124	690 444	391 171	814 742	393 886	877 689	426 655	1 011 135	455 036	1 124 408	509 914	1 391 767	517 143	1 533 079	447 602	1 218 077

Source : UN Comtrade

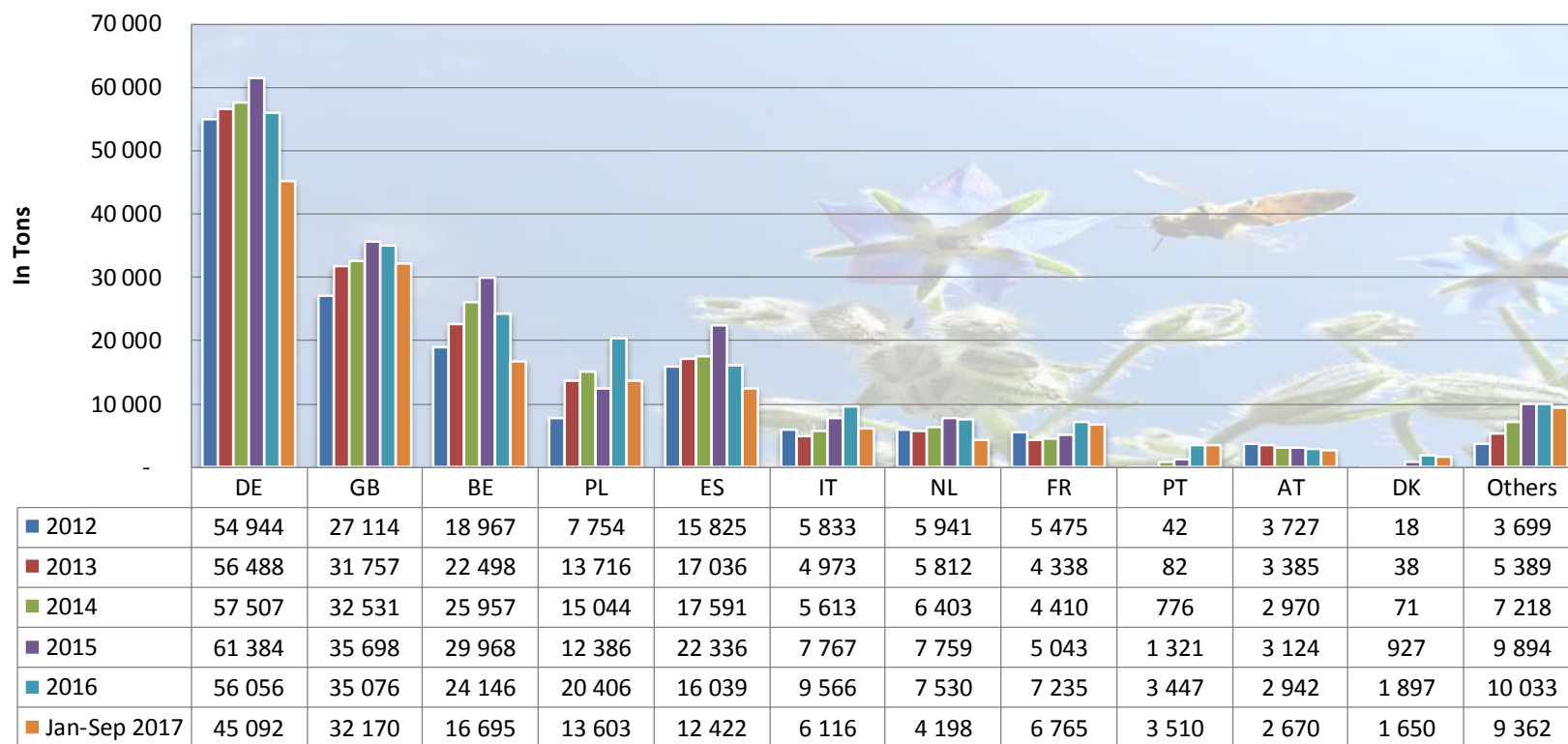
Share of Imports of Honey in 2016



EU Imports of Honey by Origin (in Tons)



Member States' Share of Imports from Third Countries (in Tons)



Source : Eurostat Comext

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

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
China	1.00	1.12	1.24	1.26	1.34	1.44	1.37	1.40	1.64	1.58	1.49
Ukraine	1.11	1.87	1.70	2.02	1.96	1.83	1.82	1.93	2.16	1.76	1.67
Argentina	1.26	1.69	2.00	2.24	2.24	2.23	2.35	2.75	3.24	2.12	2.17
Mexico	1.38	1.67	2.14	2.35	2.47	2.44	2.53	2.72	3.24	2.96	2.80
Cuba	1.22	1.30	1.92	2.08	2.25	2.32	2.29	2.38	2.82	2.42	2.33
Chile	1.36	1.77	2.19	2.57	2.70	2.59	2.62	2.97	3.72	2.77	2.89
Uruguay	1.22	1.73	1.97	2.15	2.15	2.26	2.50	2.64	3.15	2.15	2.37
Moldova	1.13	1.51			2.43	2.27	2.46	2.82	3.04	2.59	2.50
Turkey	4.24	5.53	3.85	2.79	4.74	4.90	3.51	3.86	3.98	3.99	3.67
Vietnam	1.02	1.08	0.99	1.31	3.99	3.53	1.69	1.87	2.34	1.62	1.68
New Zealand	5.06	5.13	4.49	6.77	7.55	8.83	9.21	14.29	16.14	24.10	23.88
El Salvador	1.37	1.91	2.27	2.55	2.44	2.33	2.42	2.67	3.53	2.23	2.20
Serbia	1.90	1.99	2.25	3.02	3.35	3.43	3.33	3.37	4.17	3.71	3.10
Guatemala	1.53	1.85	2.06	2.54	2.35	2.42	2.43	2.67	3.55	2.57	2.60
Brazil		1.91	2.02	2.21	2.34	2.51	2.44	2.86	3.42	3.25	4.01
Extra EU	1.37	1.69	1.93	2.05	2.08	2.08	2.04	2.14	2.52	2.23	2.23

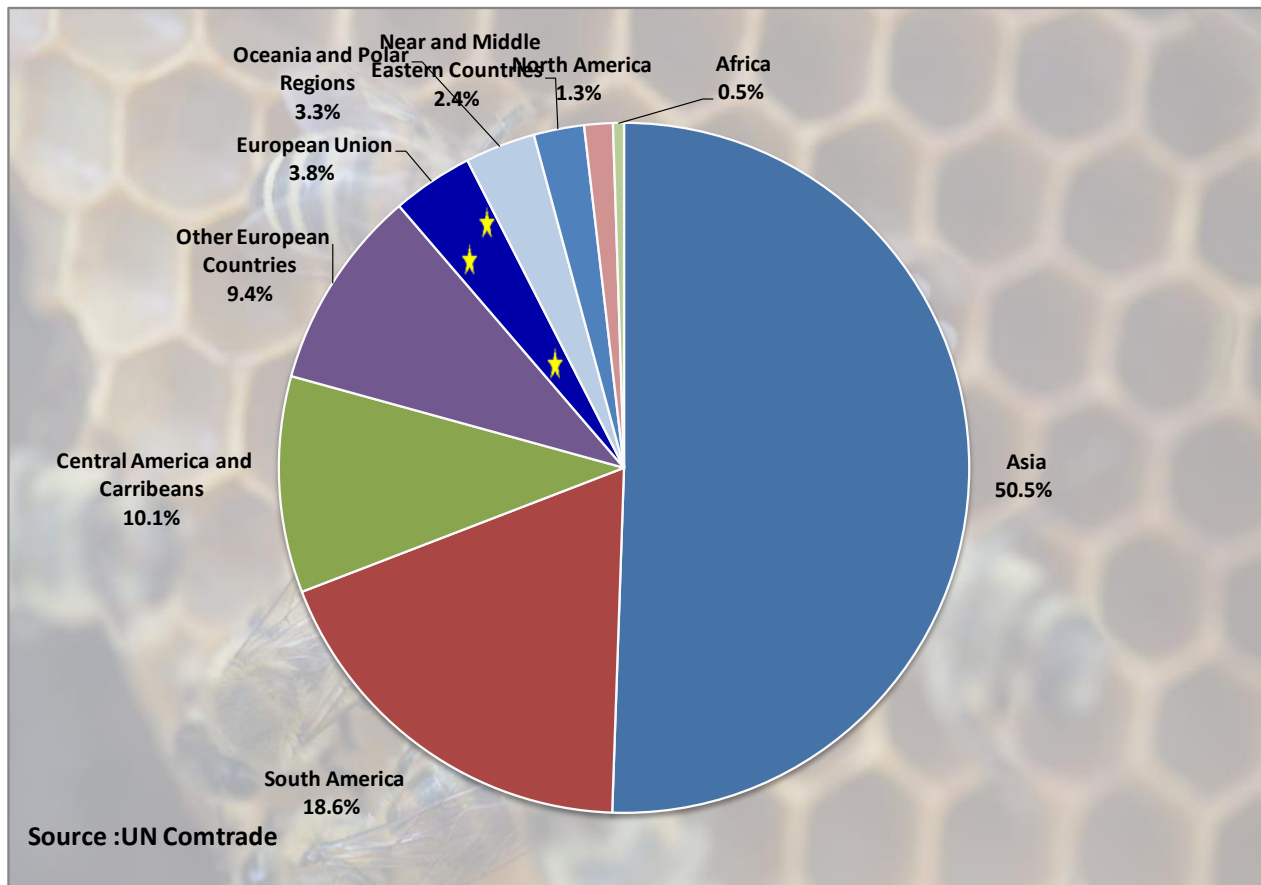
Source : Eurostat Comext

World Exports of Honey

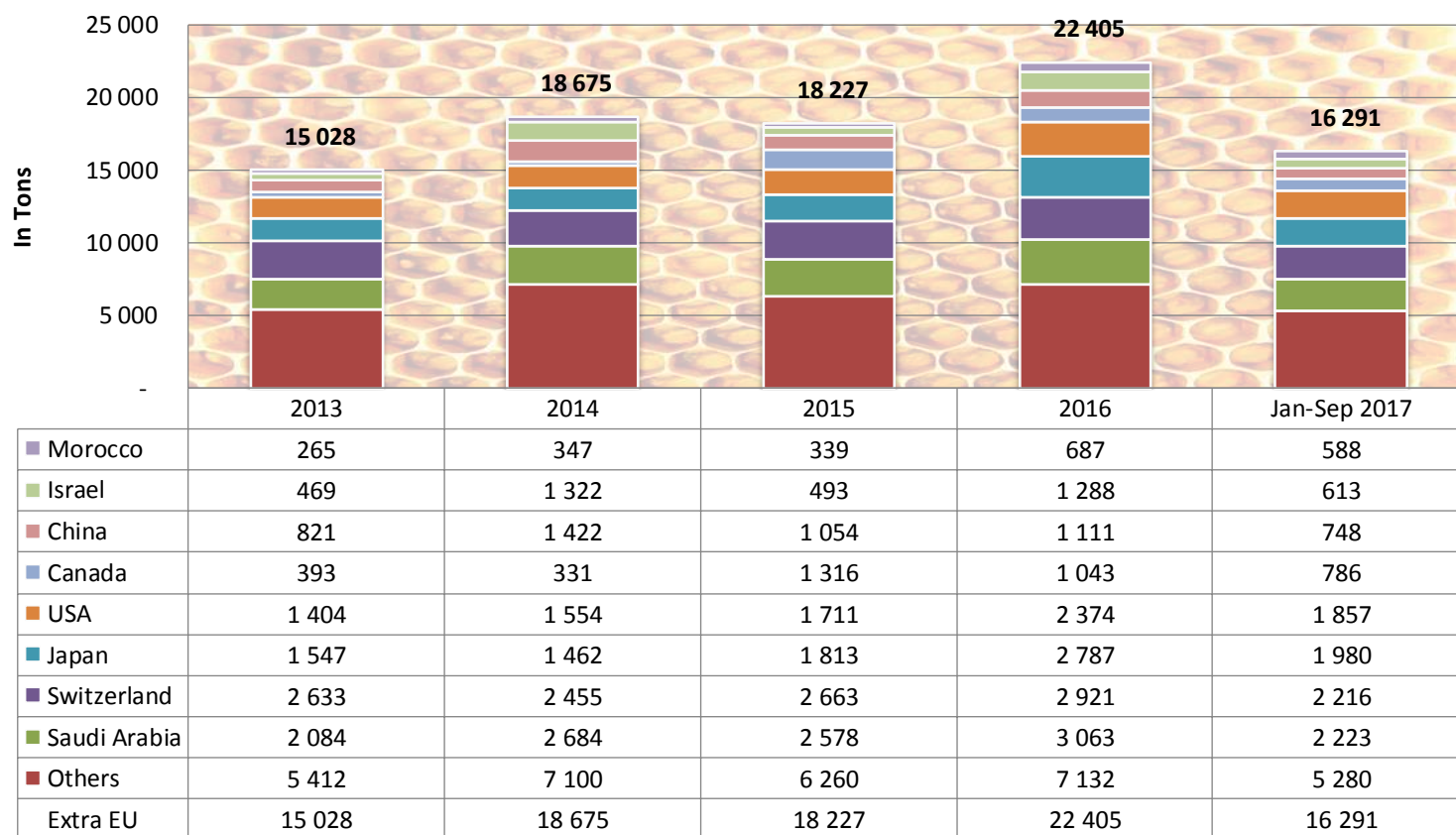
	2009		2010		2011		2012		2013		2014		2015		2016	
	Tons	1 000 €	Tons	1 000 €	Tons	1 000 €	Tons	1 000 €	Tons	1 000 €	Tons	1 000 €	Tons	1 000 €	Tons	1 000 €
Asia	120 846	166 965	164 400	254 843	166 182	283 088	153 182	303 532	202 665	358 389	223 149	416 755	244 975	548 222	172 350	340 348
<i>of which China</i>	71 831	90 117	101 138	137 670	99 968	144 646	110 157	167 376	124 897	185 633	129 822	195 903	144 756	260 172	128 330	249 847
European Union	9 520	42 452	11 516	52 140	11 913	60 031	14 415	73 928	15 028	81 334	18 675	98 958	18 227	105 362	22 405	127 466
South America	100 130	195 209	92 564	211 352	116 897	262 842	111 322	251 152	101 897	250 716	97 541	277 709	89 860	293 387	120 240	270 038
Central America and Caribbeans	30 573	64 976	30 980	73 271	31 482	74 190	37 370	90 180	40 207	98 590	45 350	125 024	48 946	161 535	30 877	88 320
Other European Countries	9 392	19 491	10 341	27 469	12 217	29 703	18 018	42 033	27 327	60 114	42 918	92 569	45 533	108 232	8 552	28 651
North America	16 931	41 265	26 143	61 473	15 959	43 600	24 097	73 126	18 469	60 845	15 563	50 829	18 438	68 313	25 355	72 768
<i>of which Canada</i>	12 162	30 125	15 145	42 379	9 569	28 302	18 339	57 488	12 266	44 498	9 456	34 620	11 979	46 978	17 954	49 316
<i>USA</i>	4 769	11 140	10 997	19 094	6 390	15 297	5 757	15 637	6 203	16 346	6 107	16 208	6 458	21 334	7 400	23 451
Oceania and Polar Regions	18 515	65 774	12 535	72 276	13 574	80 021	13 620	99 931	14 947	125 637	13 914	146 933	15 891	211 630	14 084	214 420
Near and Middle Eastern Countries	4 851	19 223	7 399	27 185	7 251	30 548	7 809	34 436	9 347	35 540	11 251	45 157	11 384	47 786	5 348	18 710
Africa	1 784	3 712	3 356	6 123	3 127	6 949	3 162	6 446	2 853	6 496	3 593	6 827	2 478	8 364	2 125	135 020
Total	312 544	619 067	359 234	786 132	378 602	870 972	382 994	974 764	432 740	1 077 660	471 955	1 260 762	495 732	1 552 832	401 337	1 295 741

Source : UN Comtrade

Share of Exports of Honey in 2016

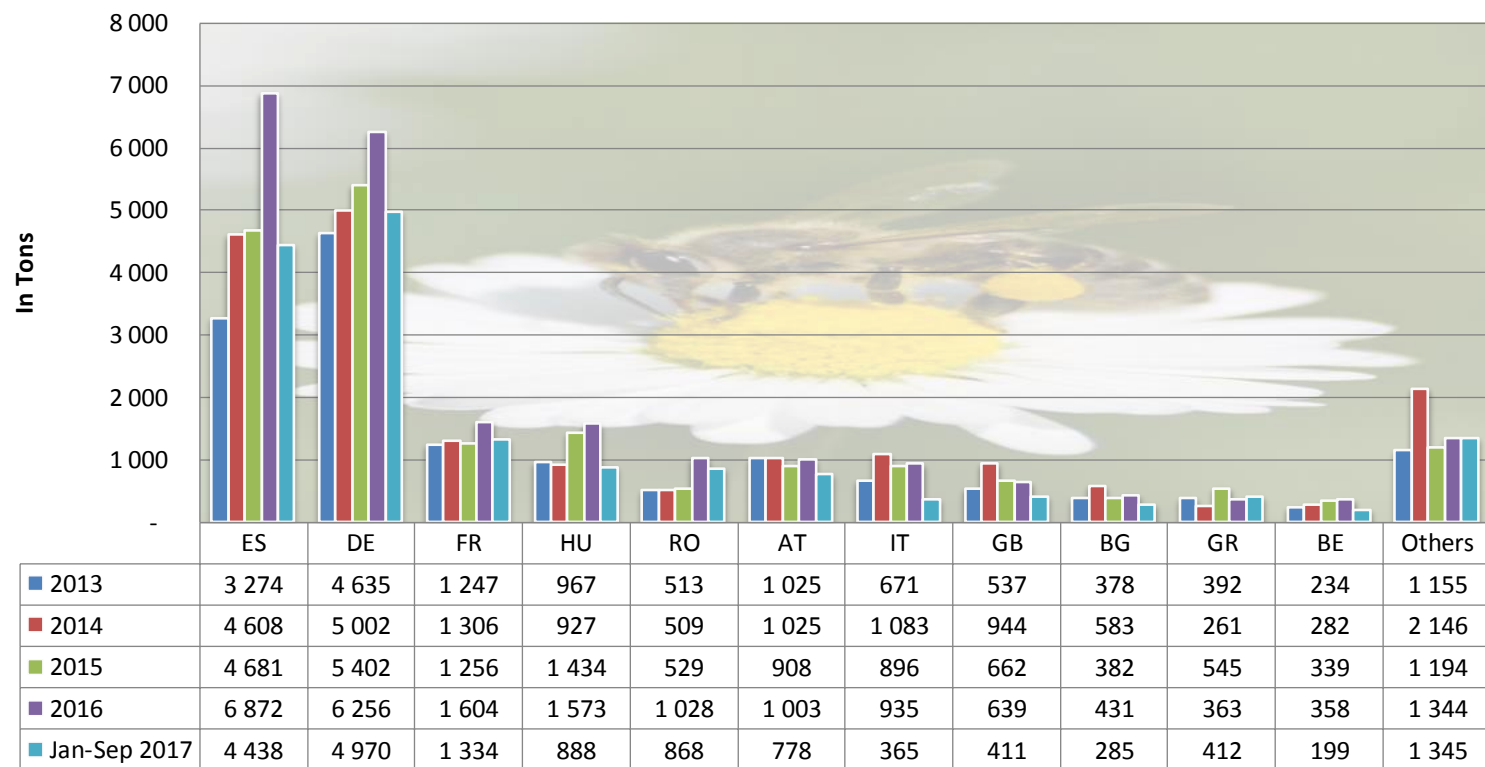


Eu Exports of Honey by Destinations



Source : Eurostat Comext

Member States Share of Export to Third Countries



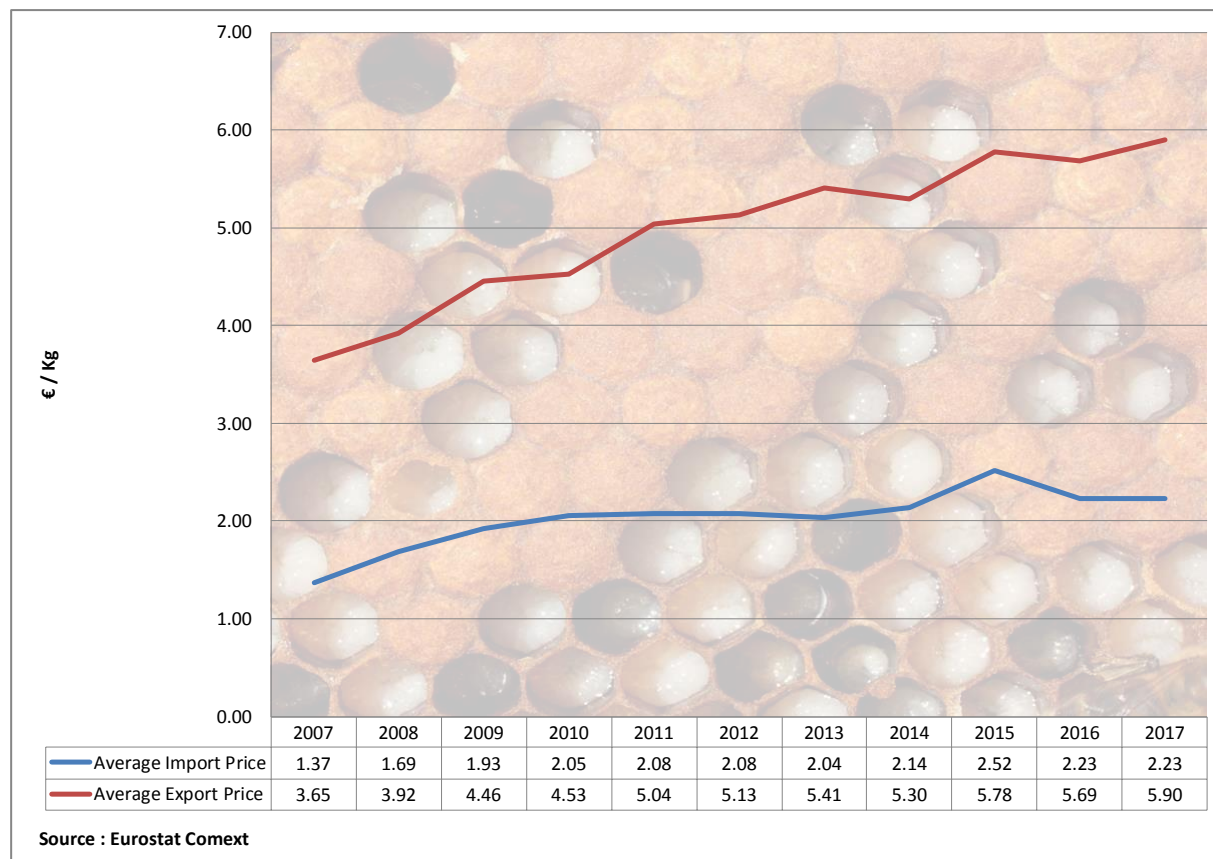
Source : Eurostat Comext

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

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Saudi Arabia	5.29	5.48	6.92	6.94	7.83	7.97	7.61	7.28	6.97	7.62	8.07
Switzerland	4.05	4.20	4.44	4.62	4.76	4.80	4.83	5.18	5.47	5.54	5.49
Japan	4.72	3.89	4.40	4.83	4.67	5.03	5.24	6.15	5.93	5.58	5.46
USA	4.11	4.27	4.24	4.33	4.03	4.66	5.21	5.17	6.38	7.08	7.34
Canada	3.80	4.57	6.10	5.06	4.58	4.87	4.36	4.28	3.56	3.79	3.71
China	5.22	6.28	5.73	5.05	5.28	5.87	6.20	4.86	6.62	5.55	5.81
Israel	2.04	2.53	2.74	2.98	3.09	2.93	2.88	2.73	3.01	2.93	2.91
Morocco	1.25	1.16	1.13	1.45	1.52	2.38	2.23	2.55	2.83	2.13	1.96
U.A.Emirates	5.30	5.86	6.54	6.83	7.71	7.80	7.66	8.05	8.30	8.43	8.89
Algeria	3.58	3.40	3.59	3.52	4.36	3.95	4.28	4.18	5.54	4.66	4.70
Hong Kong	5.03	4.93	5.86	5.66	6.26	6.49	5.96	6.24	6.77	6.53	6.47
Ceuta	3.19	3.35	3.73	3.47	4.04	4.78	4.42	2.85	3.08	2.58	3.11
Iraq	3.83	3.92	4.02	4.18	5.44	5.81	5.27	5.81	6.45	5.96	5.42
Jordan	3.15	3.30	4.41	5.32	5.45	5.95	5.86	5.49	6.48	5.11	4.70
Norway	3.88	4.12	4.58	5.51	4.84	5.75	5.40	4.97	6.26	5.98	5.04
Extra EU	3.65	3.92	4.46	4.53	5.04	5.13	5.41	5.30	5.78	5.69	5.90

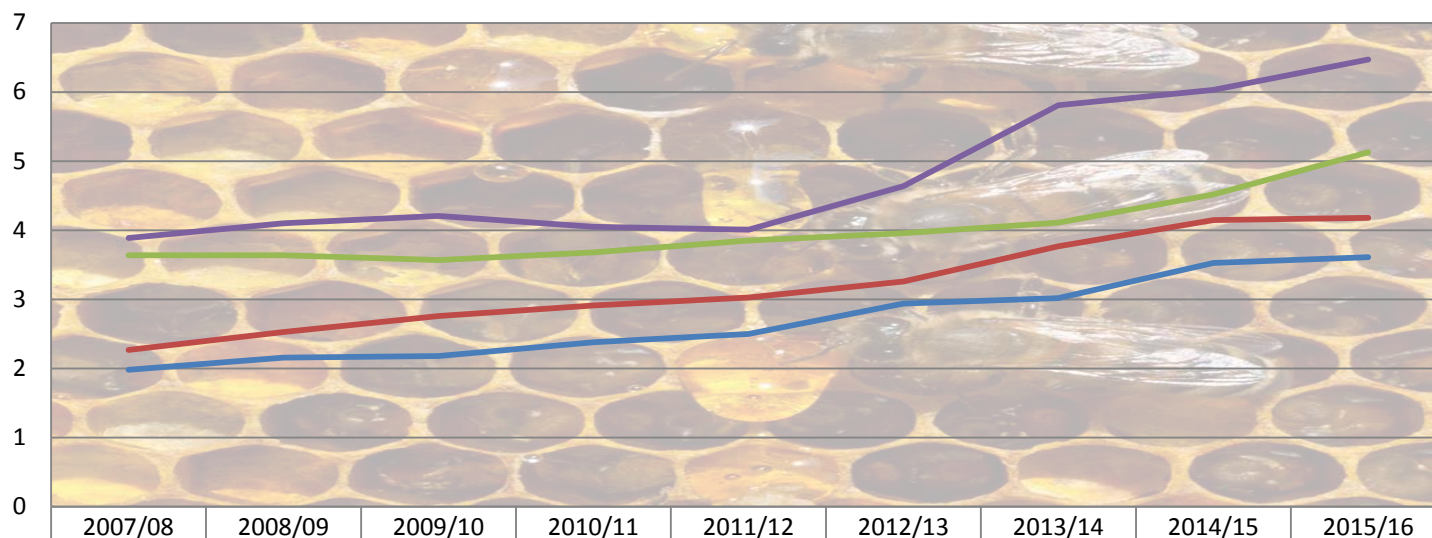
Source : Eurostat Comext

Average Import and Export Prices



Honey Price Evolution in Spain

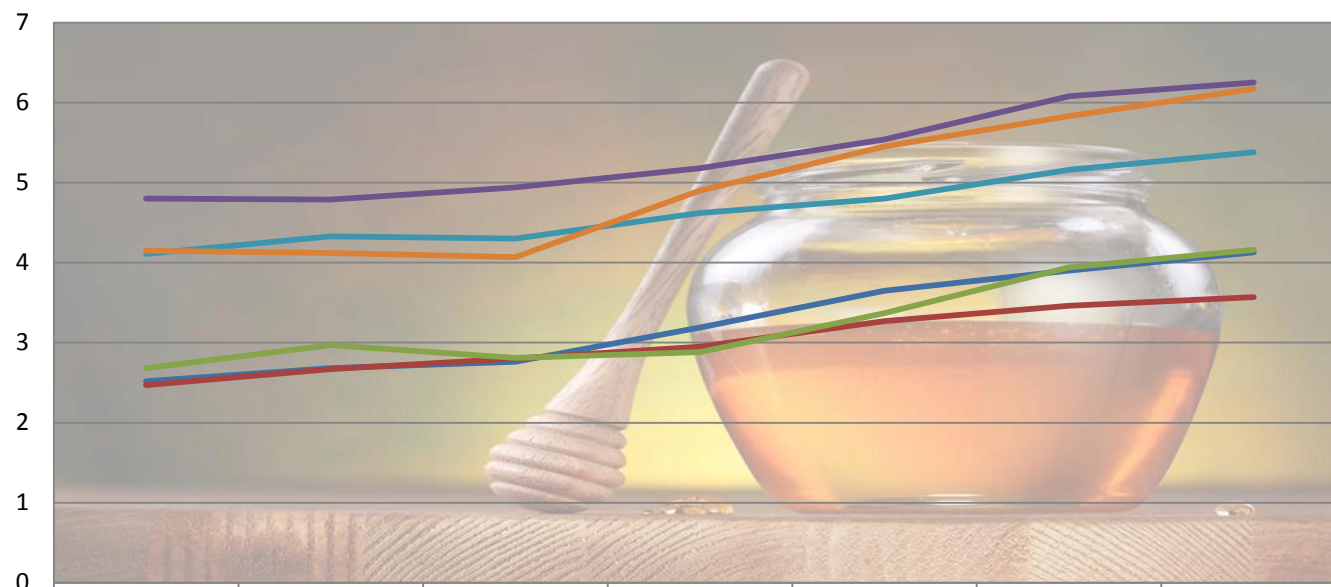
Honey Price Evolution 2007-2016 (euros/kg)



Source : Gobierno de España - ministerio de agricultura, alimentacion y medio ambiente

Honey Price Evolution in Spain

Honey Price Evolution (euros/kg)

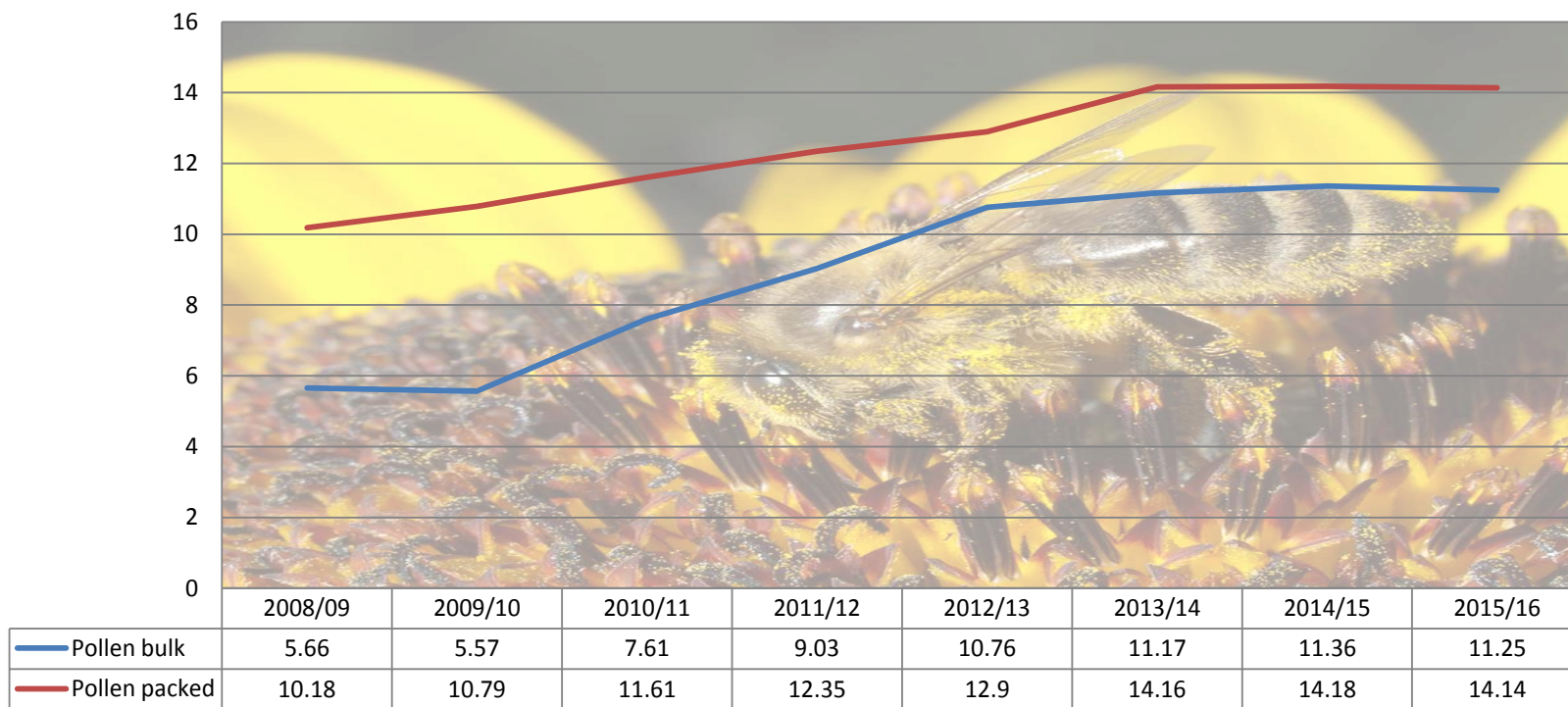


	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16
Blossom Honey bulk	2.52	2.68	2.76	3.19	3.65	3.9	4.13
Eucalyptus Honey bulk	2.47	2.67	2.8	2.95	3.27	3.46	3.57
Rosmary honey bulk	2.68	2.97	2.81	2.88	3.37	3.94	4.16
Blossom Honey packed	4.8	4.79	4.94	5.18	5.54	6.08	6.25
Eucalyptus Honey packed	4.11	4.33	4.3	4.62	4.8	5.16	5.38
Rosmary honey packed	4.15	4.12	4.07	4.9	5.45	5.83	6.17

Source : Gobierno de España - ministerio de agricultura, alimentacion y medio ambiente

Honey Price Evolution in Spain

Pollen Price Evolution (euros/kg)



Source : Gobierno de España - ministerio de agricultura, alimentacion y medio ambiente

Where to find data:

- http://ec.europa.eu/agriculture/markets/index_en.htm
- **Click on link: Honey-Beekeeping**