



Honey Market Presentation

**Civil Dialogue Group
20 June 2018**



Overview of EU honey market (1)

- EU second world producer (approx 250 000 tons) after China
- Total number of beehives: 15.5 millions
- Total number of beekeepers decreasing: 600 000
- Small sector but essential for agriculture for pollinisation



Overview of EU honey market (2)

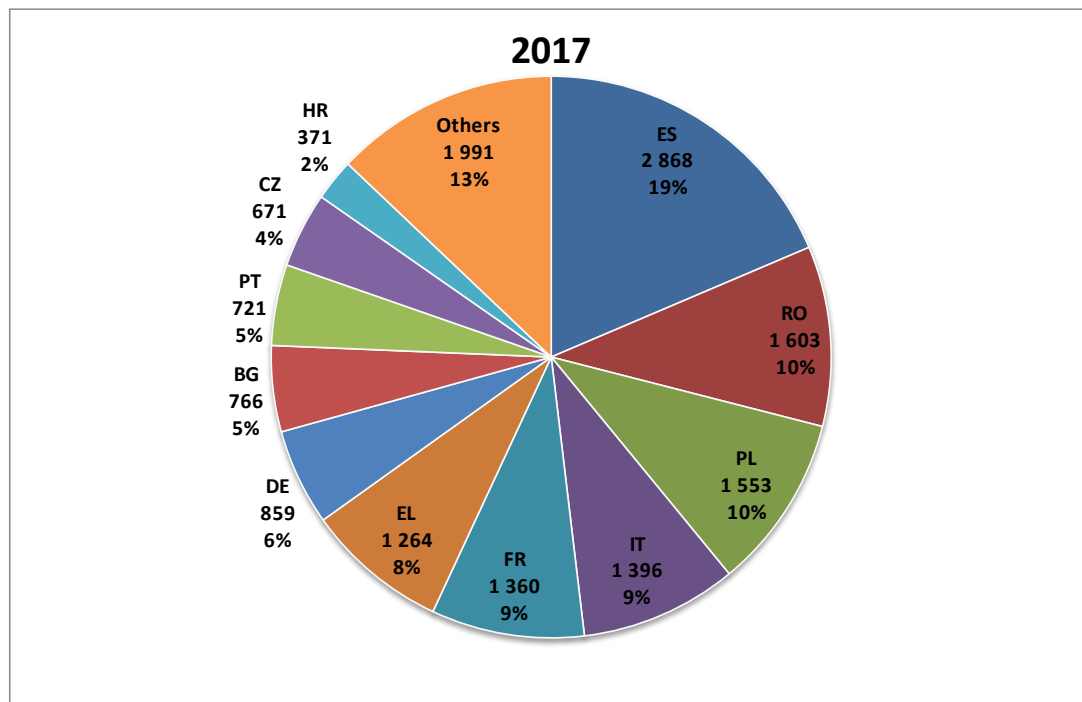
- EU is only 60% self-sufficient in honey
- Imports needed to cover EU domestic consumption
- Main supplier for imported honey: China (around 40% of EU imports)
- EU honey trade balance largely negative: Imports > Exports



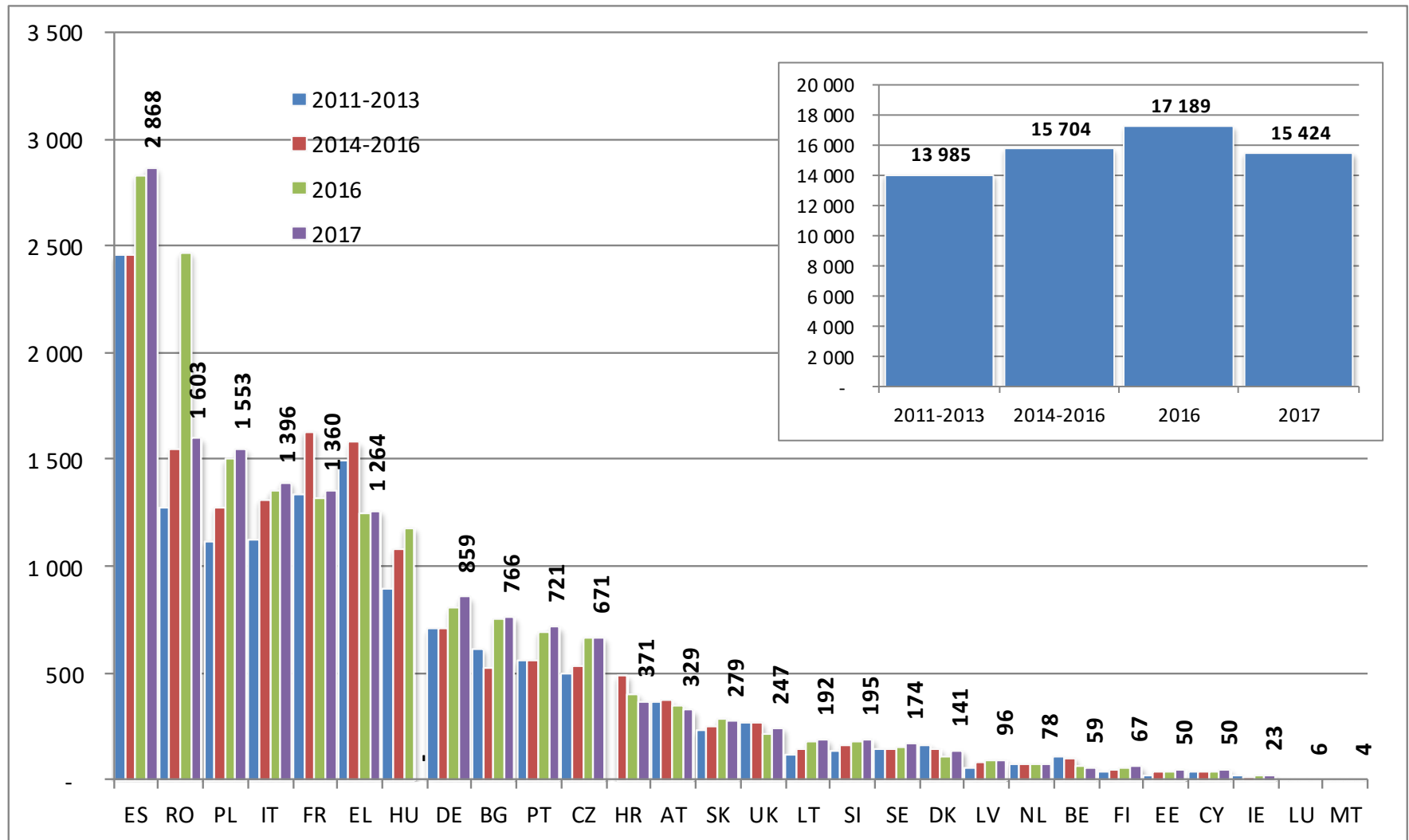
Number of hives



	2016	2017		
ES	2 834	2 868	↑	+1.2%
RO	2 472	1 603	↓	-35.2%
PL	1 505	1 553	↑	+3.2%
IT	1 356	1 396	↑	+3.0%
FR	1 322	1 360	↑	+2.8%
EL	1 248	1 264	↑	+1.3%
DE	807	859	↑	+6.4%
BG	754	766	↑	+1.5%
PT	700	721	↑	+3.1%
CZ	671	671	↓	-0.1%
HR	406	371	↓	-8.5%
AT	354	329	↓	-7.0%
SK	292	279	↓	-4.6%
UK	223	247	↑	+10.9%
SI	181	195	↑	+7.6%
LT	186	192	↑	+3.1%
SE	154	174	↑	+13.0%
DK	115	141	↑	+22.1%
LV	97	96	↓	-0.5%
NL	79	78	↓	-1.4%
FI	64	67	↑	+4.7%
BE	65	59	↓	-8.8%
EE	44	50	↑	+12.2%
CY	43	50	↑	+15.0%
IE	21	23	↑	+8.3%
LU	6	6	↑	+10.3%
MT	4	4	↑	+5.5%
HU	1 184	0	↓	-100.0%
EU	17 189	15 424	↓	-10.3%



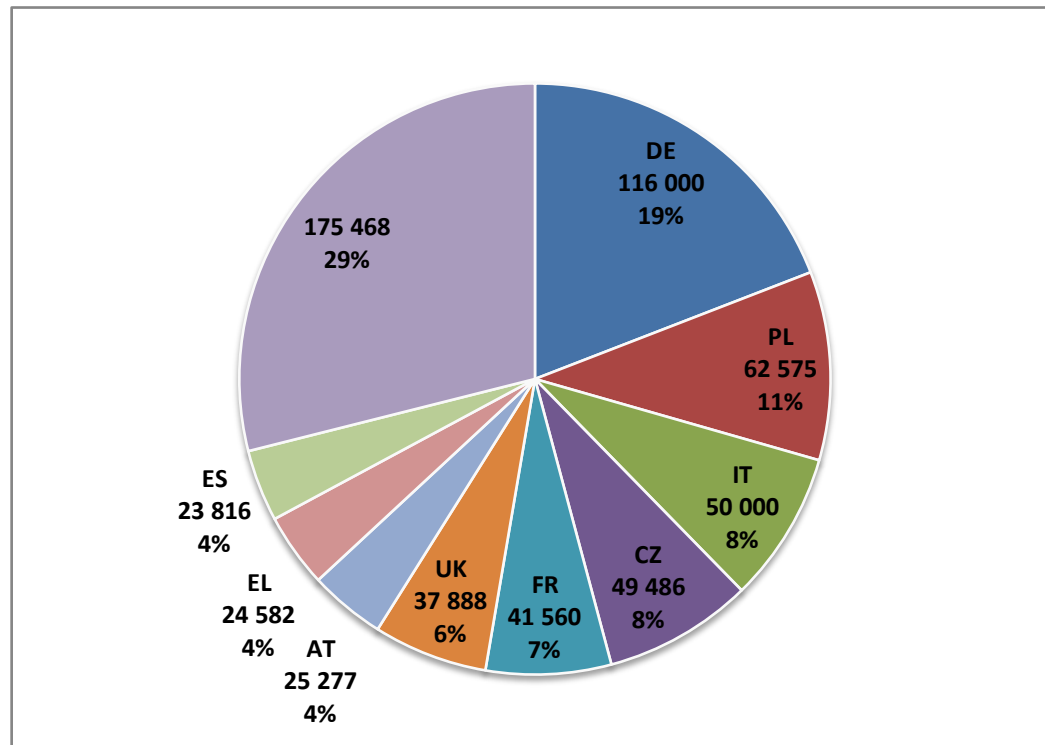
Number of hives (in thousand)



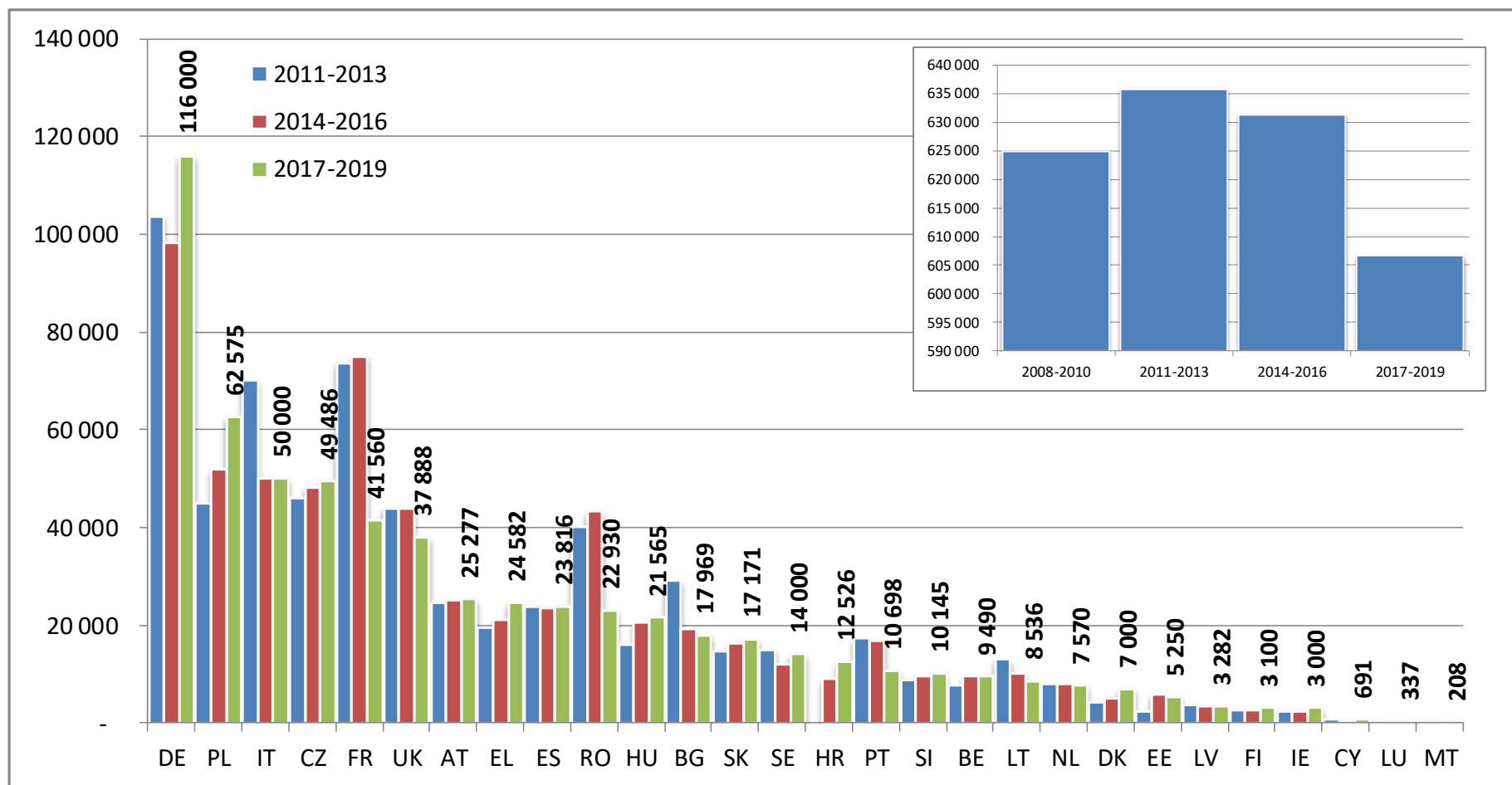
Number of beekeepers



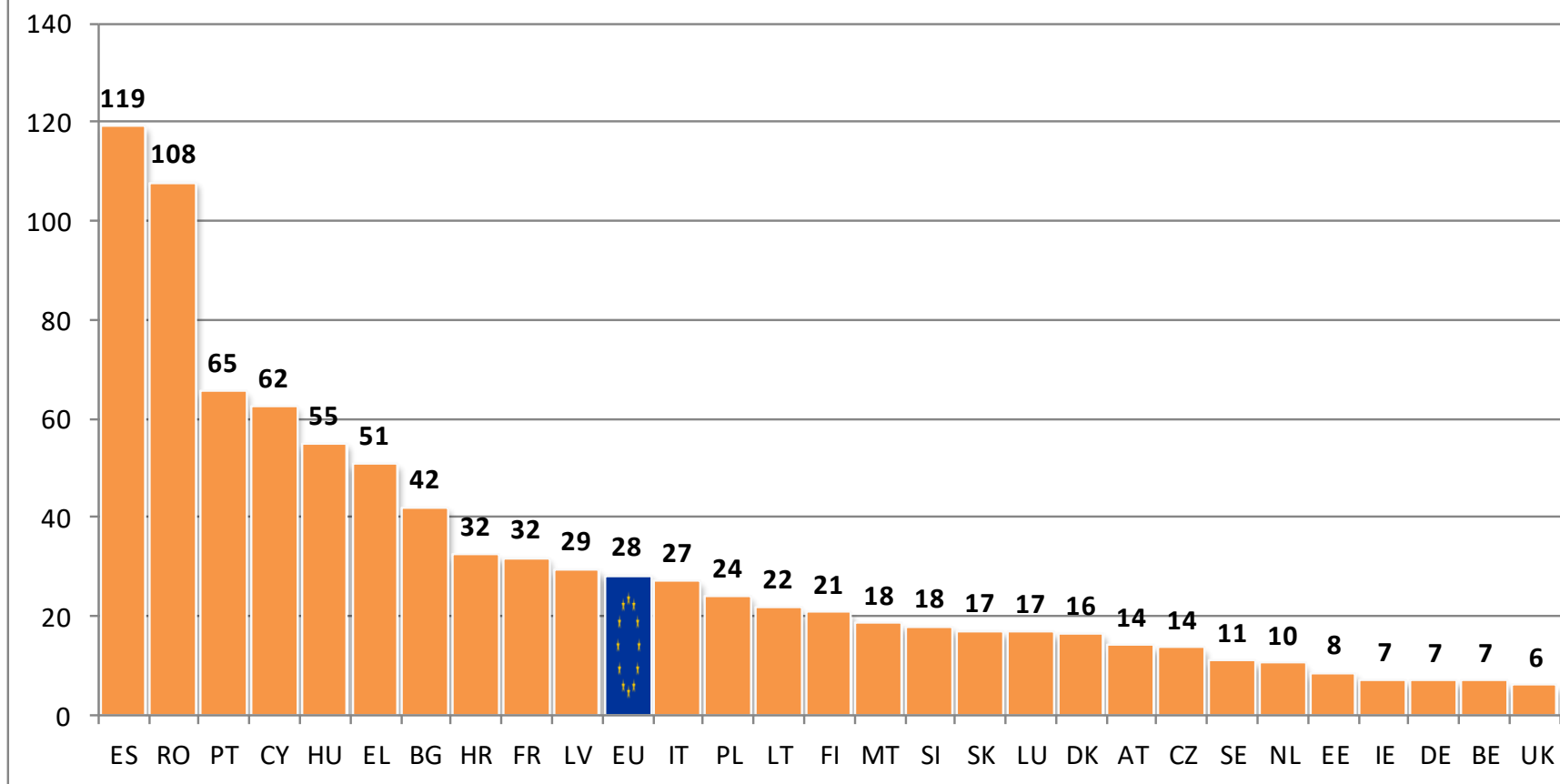
	2014-2016	2017-2019	
DE	98 297	116 000	↑ +18.0%
PL	51 778	62 575	↑ +20.9%
IT	50 000	50 000	→ +0.0%
CZ	48 132	49 486	↑ +2.8%
FR	75 000	41 560	↓ -44.6%
UK	43 900	37 888	↓ -13.7%
AT	25 099	25 277	↑ +0.7%
EL	21 031	24 582	↑ +16.9%
ES	23 473	23 816	↑ +1.5%
RO	43 200	22 930	↓ -46.9%
HU	20 410	21 565	↑ +5.7%
BG	19 179	17 969	↓ -6.3%
SK	16 338	17 171	↑ +5.1%
SE	12 000	14 000	↑ +16.7%
HR	8 953	12 526	↑ +39.9%
PT	16 774	10 698	↓ -36.2%
SI	9 638	10 145	↑ +5.3%
BE	9 500	9 490	↓ -0.1%
LT	10 132	8 536	↓ -15.8%
NL	8 000	7 570	↓ -5.4%
DK	5 000	7 000	↑ +40.0%
EE	5 934	5 250	↓ -11.5%
LV	3 346	3 282	↓ -1.9%
FI	2 700	3 100	↑ +14.8%
IE	2 326	3 000	↑ +29.0%
CY	550	691	↑ +25.6%
LU	331	337	↑ +1.8%
MT	215	208	↓ -3.3%
	631 236	606 652	↓ -3.9%



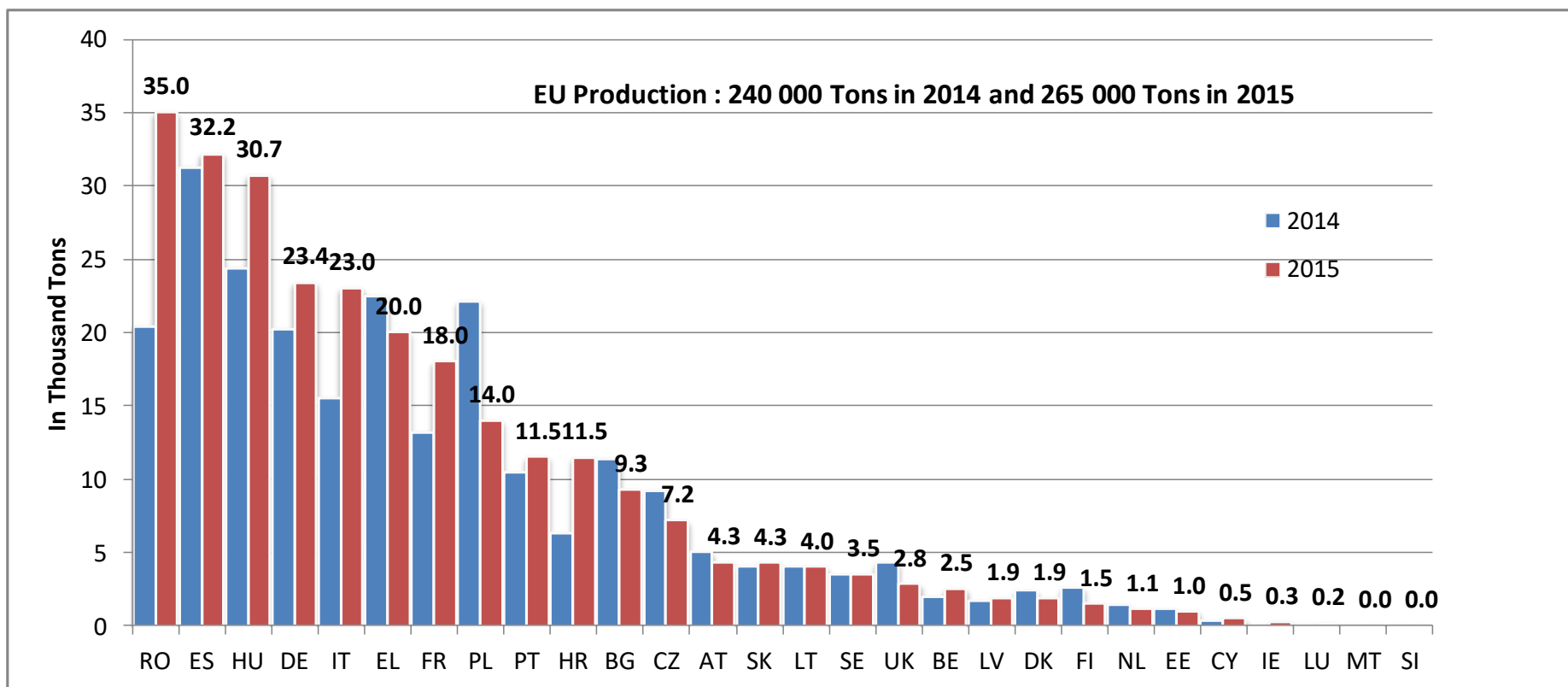
Evolution of the number of beekeepers



Average Number of hives per Beekeeper (2016)

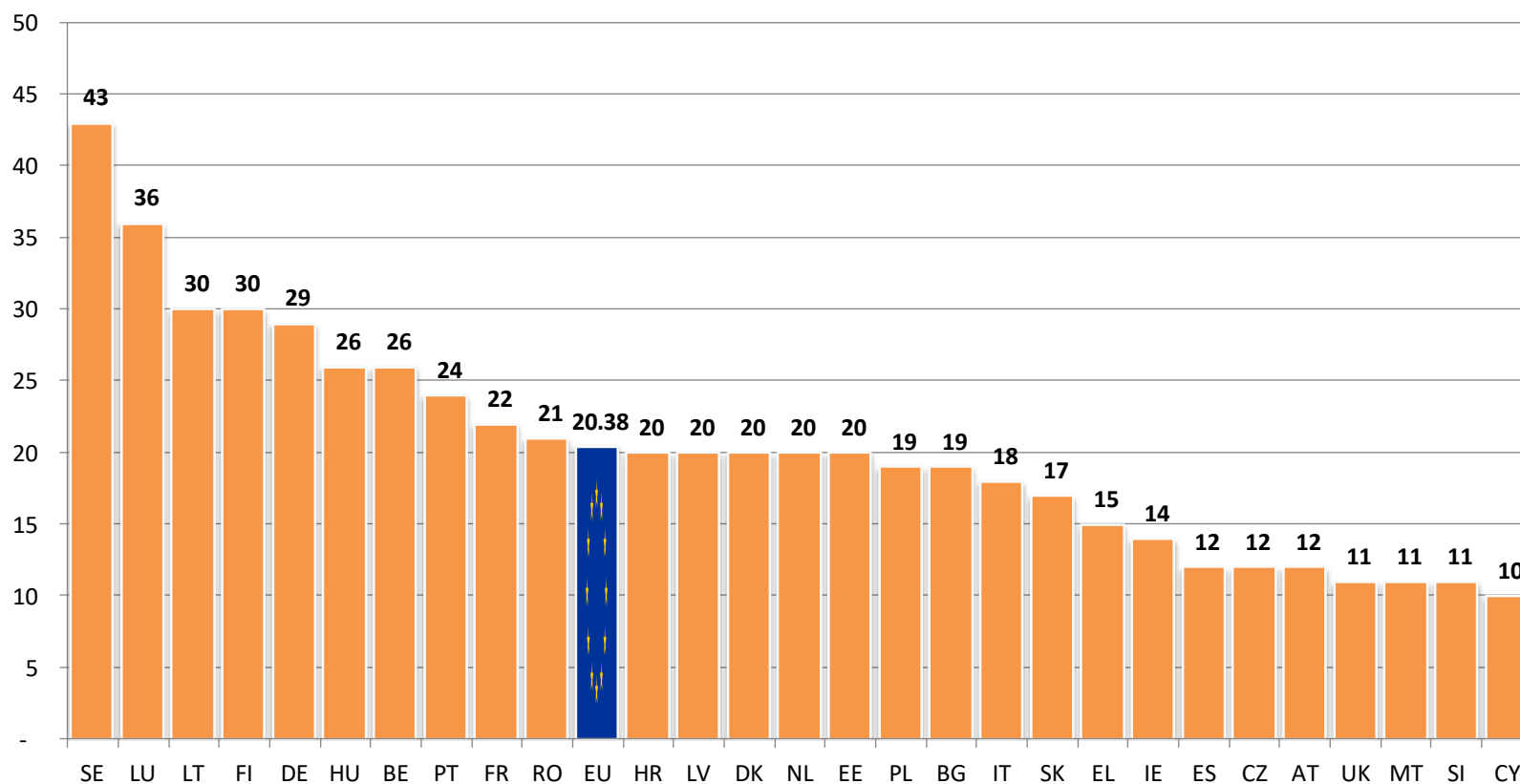


EU Honey Production



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The estimated average yield in kg of honey per beehive and per year in 2016

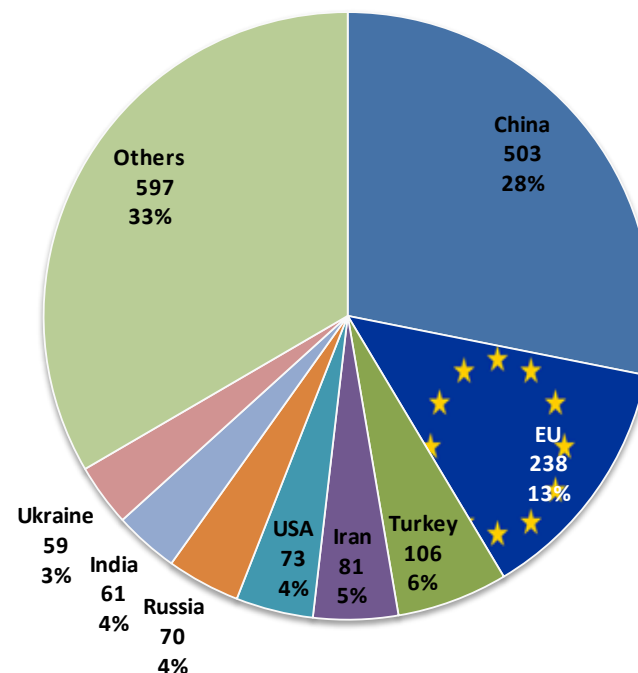


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World Production of Honey per Country (1 000 T)

	2014	2015	2016	Share of World Production
China	475	489	503	28%
EU	211	257	238	13%
Turkey	104	108	106	6%
Iran	78	79	81	5%
USA	81	71	73	4%
Russia	75	68	70	4%
India	61	61	61	3%
Ukraine	67	64	59	3%
Mexico	61	62	55	3%
Argentina	-	58	51	3%
Ethiopia	-	59	48	3%
Brazil	38	38	40	2%
Canada	41	40	39	2%
Tanzania	31	30	30	2%
Kenya	30	35	26	1%
Republic of Korea	24	24	24	1%
Angola	23	23	23	1%
Uruguay	20	19	20	1%
New Zealand	18	20	20	1%
Republic	16	17	17	1%
Viet Nam	14	15	17	1%
Australia	14	13	13	1%
Other	152	176	174	10%
20 June 2018	1 632	1 826	1 787	

Source : FAO

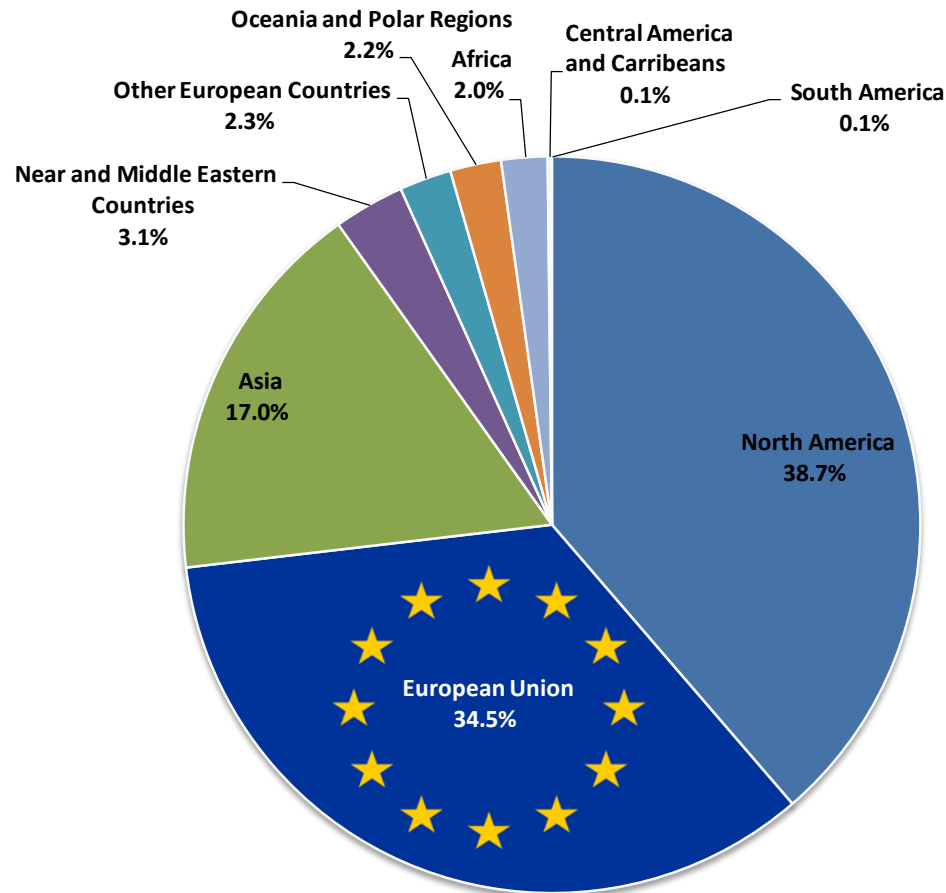


World Imports of Honey

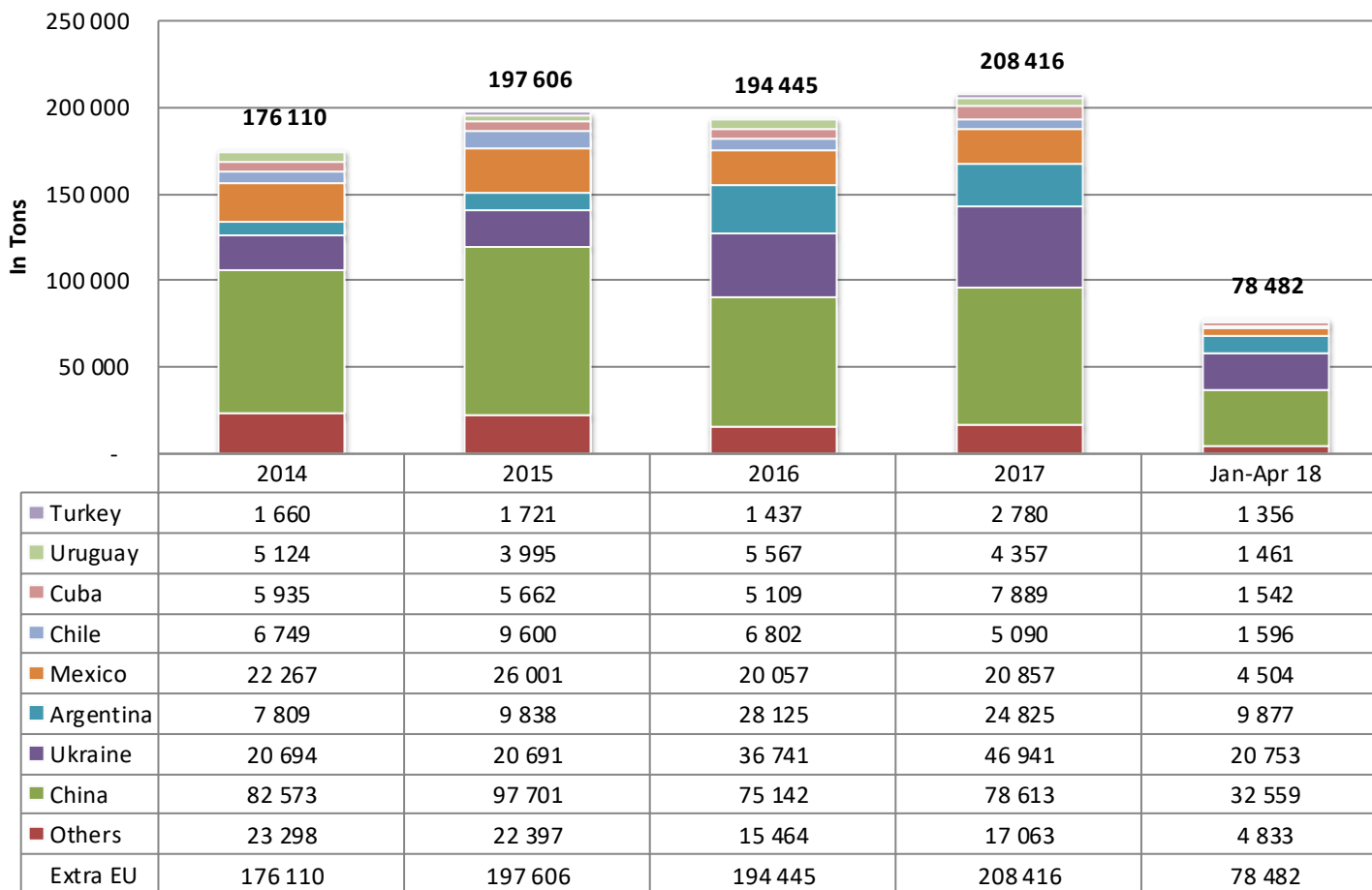
	2015		2016		Share of World Imports	
	Tons	1 000 €	Tons	1 000 €	Tons	1 000 €
European Union	194 375	432 853	208 361	456 822	41.5%	34.3%
North America	182 612	574 891	173 136	408 235	34.5%	30.7%
<i>of which USA</i>	175 203	545 316	166 477	381 718	33.2%	28.7%
Asia	79 182	306 988	76 168	311 452	15.2%	23.4%
<i>of which Japan</i>	36 222	106 032	48 445	142 477	9.7%	10.7%
<i>China</i>	6 517	67 442	6 032	65 739	1.2%	4.9%
Near and Middle Eastern Countries	31 499	104 194	13 922	49 871	2.8%	3.7%
Other European Countries	11 036	45 983	10 210	40 981	2.0%	3.1%
Africa	6 328	14 511	9 074	19 568	1.8%	1.5%
Oceania and Polar Regions	11 232	50 749	10 015	41 671	2.0%	3.1%
Central America and Carribeans	612	2 094	579	1 735	0.1%	0.1%
South America	268	816	246	599	0.0%	0.0%
Total	517 143	1 533 079	501 711	1 330 934		

Source : UN Comtrade

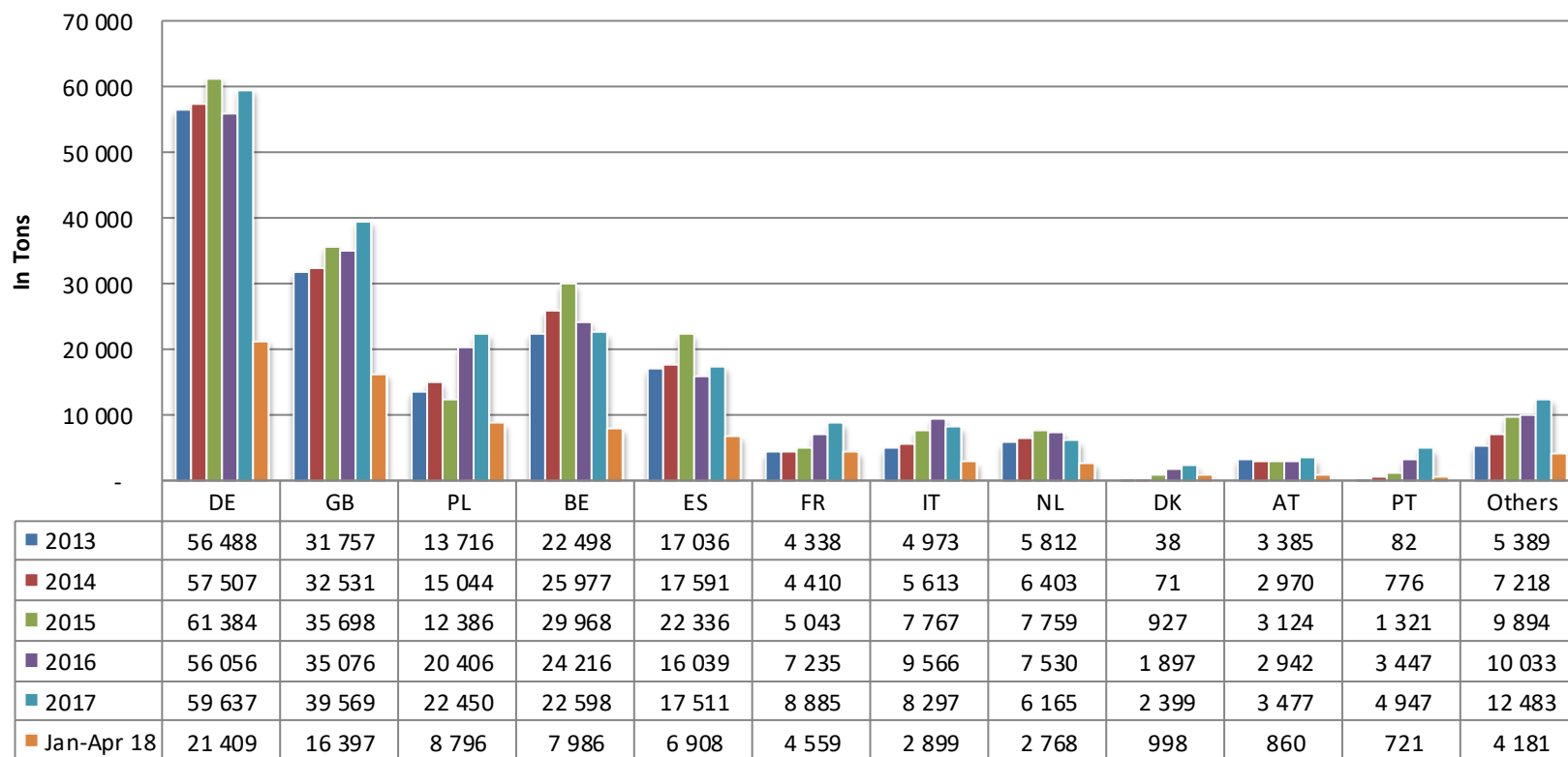
Share of Imports of Honey in 2016



EU Imports of Honey by Origin (in Tons)



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



Source : Eurostat Comext

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

	2015	2016	2017	2018		
China	1.64	1.58	1.47	1.30	↓	-11.6%
Ukraine	2.16	1.76	1.74	1.90	↑	+9.6%
Argentina	3.24	2.12	2.23	2.37	↑	+6.4%
Mexico	3.24	2.96	2.80	2.77	↓	-1.1%
Cuba	2.82	2.42	2.34	2.42	↑	+3.4%
Chile	3.72	2.77	2.90	2.78	↓	-4.1%
Moldova	3.04	2.59	2.49	2.53	↑	+1.6%
Uruguay	3.15	2.15	2.36	2.42	↑	+2.6%
Turkey	3.98	4.01	3.75	4.10	↑	+9.3%
New Zealand	16.14	24.10	23.36	23.56	↑	+0.8%
Vietnam	2.34	1.62	1.66	1.49	↓	-10.2%
Serbia	4.17	3.71	3.06	3.49	↑	+14.2%
Brazil	3.42	3.25	3.84	3.63	↓	-5.7%
El Salvador	3.53	2.23	2.21	2.56	↑	+16.1%
Guatemala	3.55	2.57	2.60	1.99	↓	-23.6%
Extra EU	2.52	2.23	2.19	2.03	↓	-7.4%

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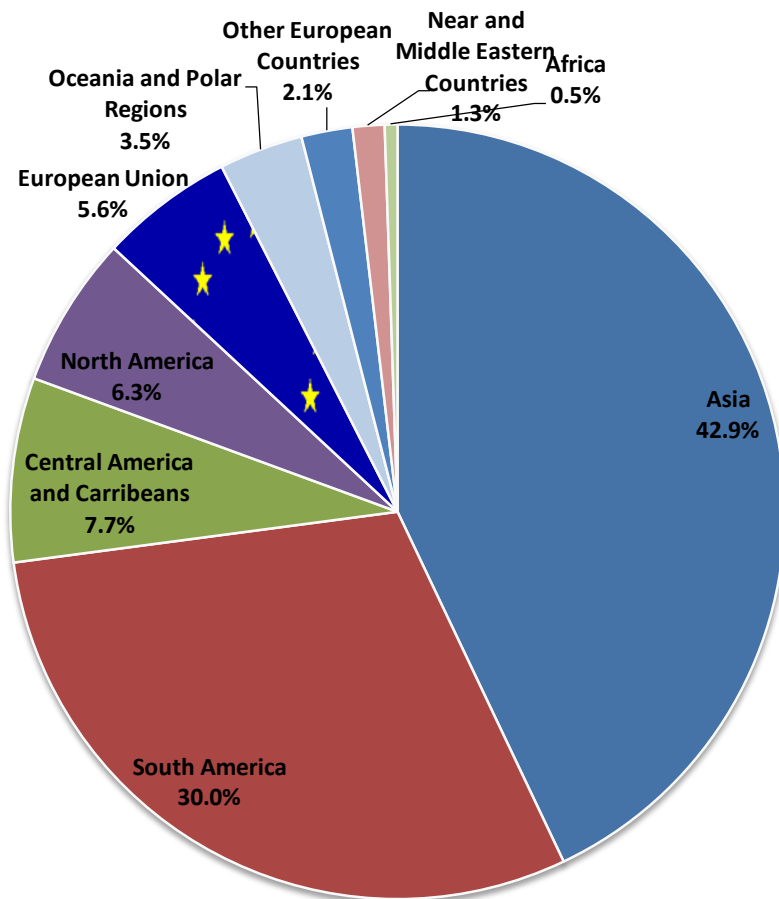
World Exports of Honey

	2015		2016		Share of World Imports	
	Tons	1 000 €	Tons	1 000 €	Tons	1 000 €
Asia	244 975	548 222	172 350	340 348	42.9%	26.3%
<i>of which China</i>	144 756	260 172	128 330	249 847	32.0%	19.3%
European Union	18 227	105 362	22 518	127 996	5.6%	9.9%
South America	89 860	293 387	120 240	270 038	30.0%	20.8%
Central America and Carribeans	48 946	161 535	30 877	88 320	7.7%	6.8%
Other European Countries	45 533	108 232	8 552	28 651	2.1%	2.2%
North America	18 438	68 313	25 355	72 768	6.3%	5.6%
<i>of which Canada</i>	11 979	46 978	17 954	49 316	4.5%	3.8%
<i>USA</i>	6 458	21 334	7 400	23 451	1.8%	1.8%
Oceania and Polar Regions	15 891	211 630	14 084	214 420	3.5%	16.5%
Near and Middle Eastern Countries	11 384	47 786	5 348	18 710	1.3%	1.4%
Africa	2 478	8 364	2 125	135 020	0.5%	10.4%
Total	495 732	1 552 833	401 449	1 296 271		

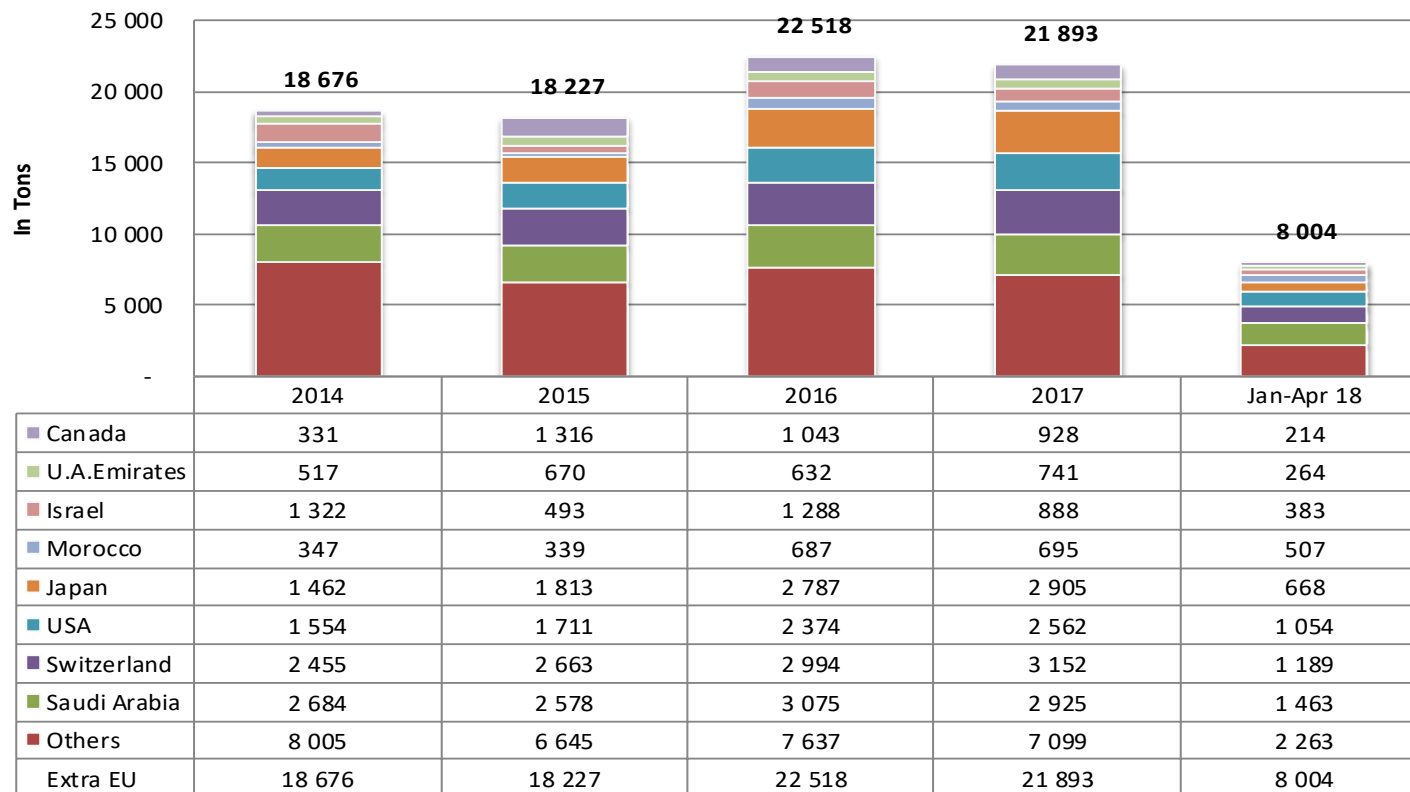
Source : UN Comtrade

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Share of Exports of Honey in 2016

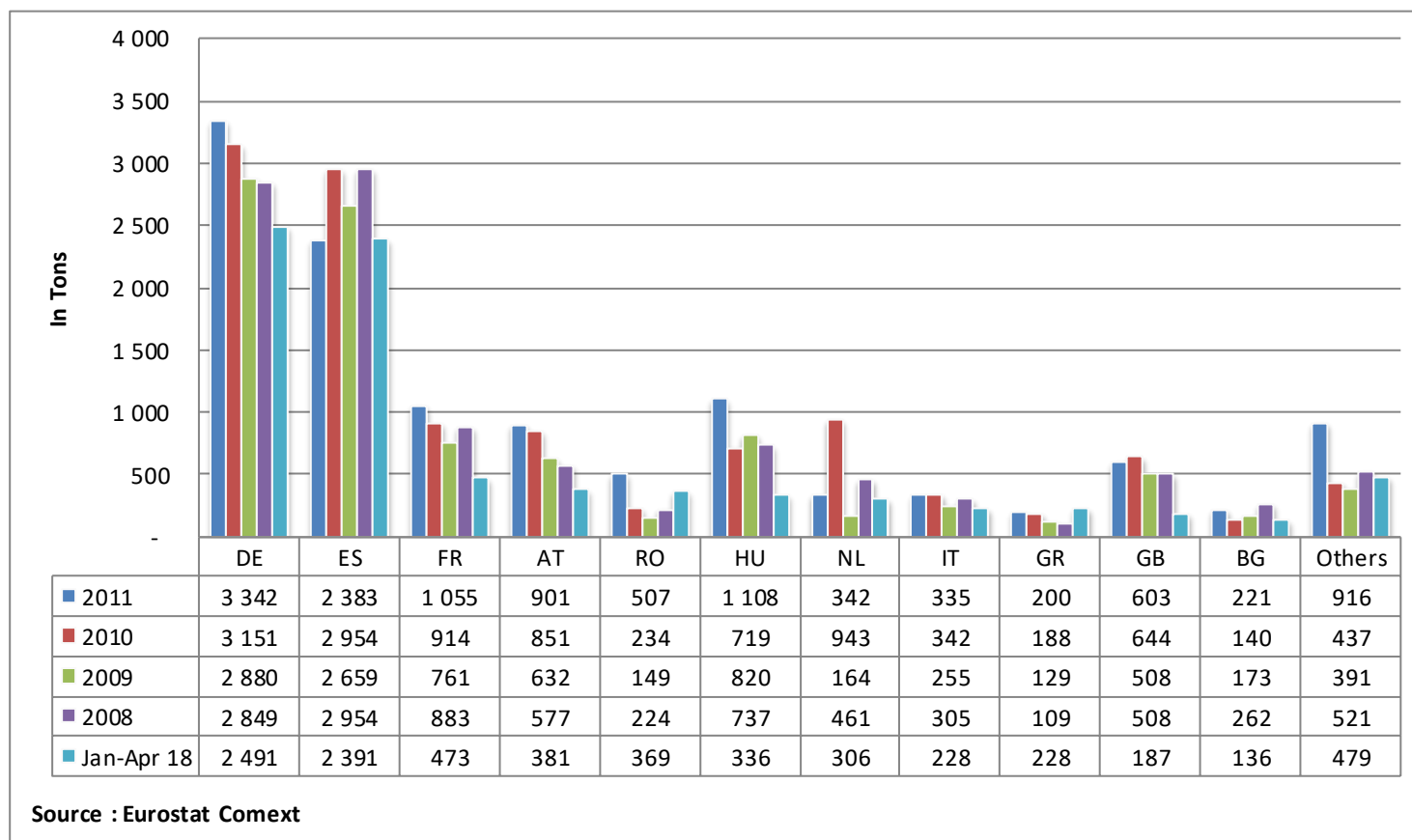


EU Exports of Honey by Destinations



Source : Eurostat Comext

Member States Share of Export to Third Countries



20 June 2018

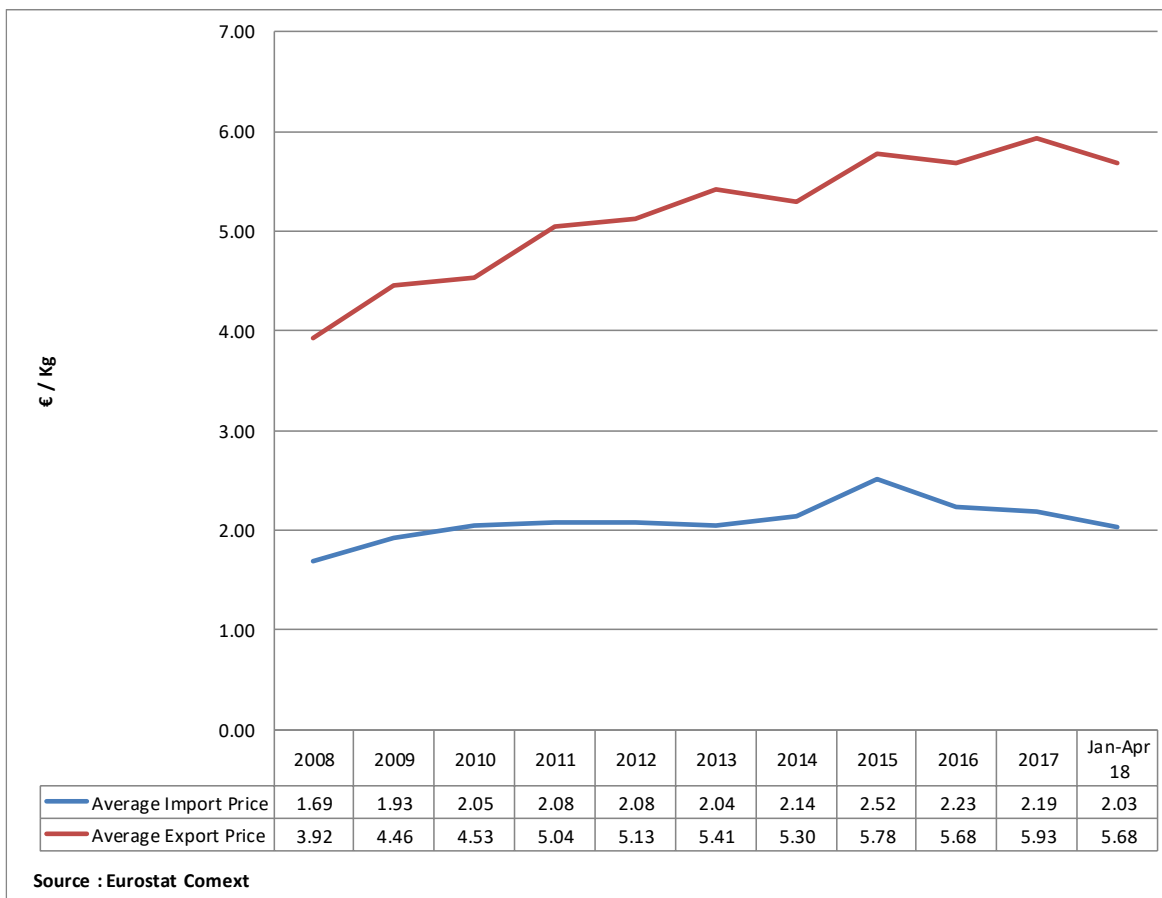
EU Average Unit Value for Exported Honey (€/kg) by Destination

	2015	2016	2017	2018		
Switzerland	5.47	5.52	5.56	5.51	↓	-0.9%
Saudi Arabia	6.97	7.61	7.84	7.44	↓	-5.0%
Japan	5.93	5.58	5.49	5.54	↑	+0.9%
USA	6.38	7.08	7.38	6.92	↓	-6.3%
China	6.62	5.53	5.79	4.91	↓	-15.2%
Canada	3.56	3.79	3.75	4.65	↑	+23.9%
Israel	3.01	2.93	2.93	2.96	↑	+1.1%
U.A.Emirates	8.30	8.44	8.36	7.92	↓	-5.3%
Morocco	2.83	2.13	1.98	1.72	↓	-13.4%
Hong Kong	6.77	6.52	6.51	7.15	↑	+9.8%
Algeria	5.54	4.66	5.46	3.47	↓	-36.4%
Jordan	6.48	5.11	4.86	4.87	↑	+0.2%
Iraq	6.45	5.96	5.48	6.39	↑	+16.7%
Pakistan	6.77	7.10	6.12	6.17	↑	+0.7%
Ceuta	3.08	2.58	3.36	3.58	↑	+6.4%
Extra EU	5.78	5.68	5.93	5.68	↓	-4.3%

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Source : Eurostat Comext

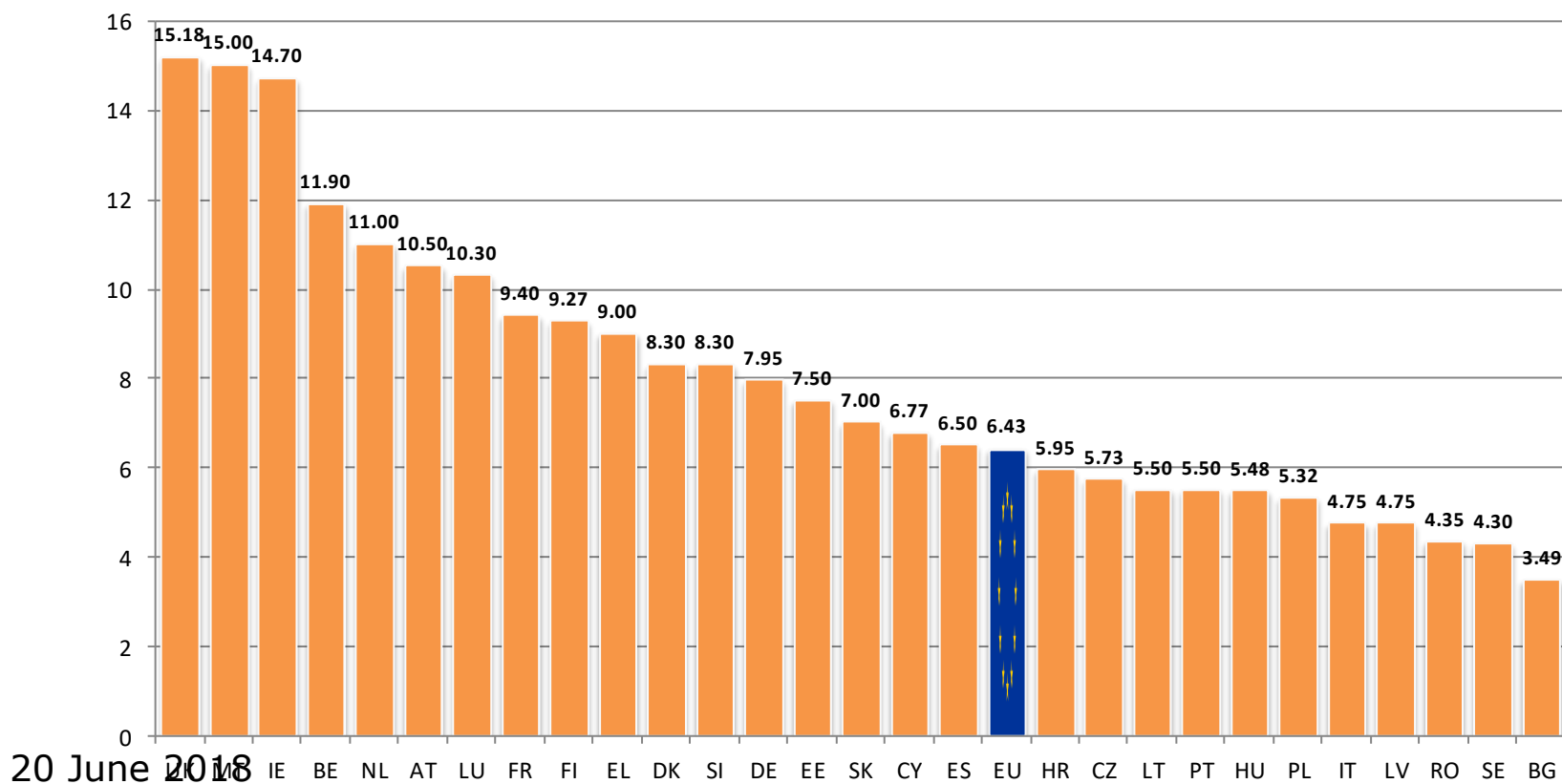
Average Import and Export Prices



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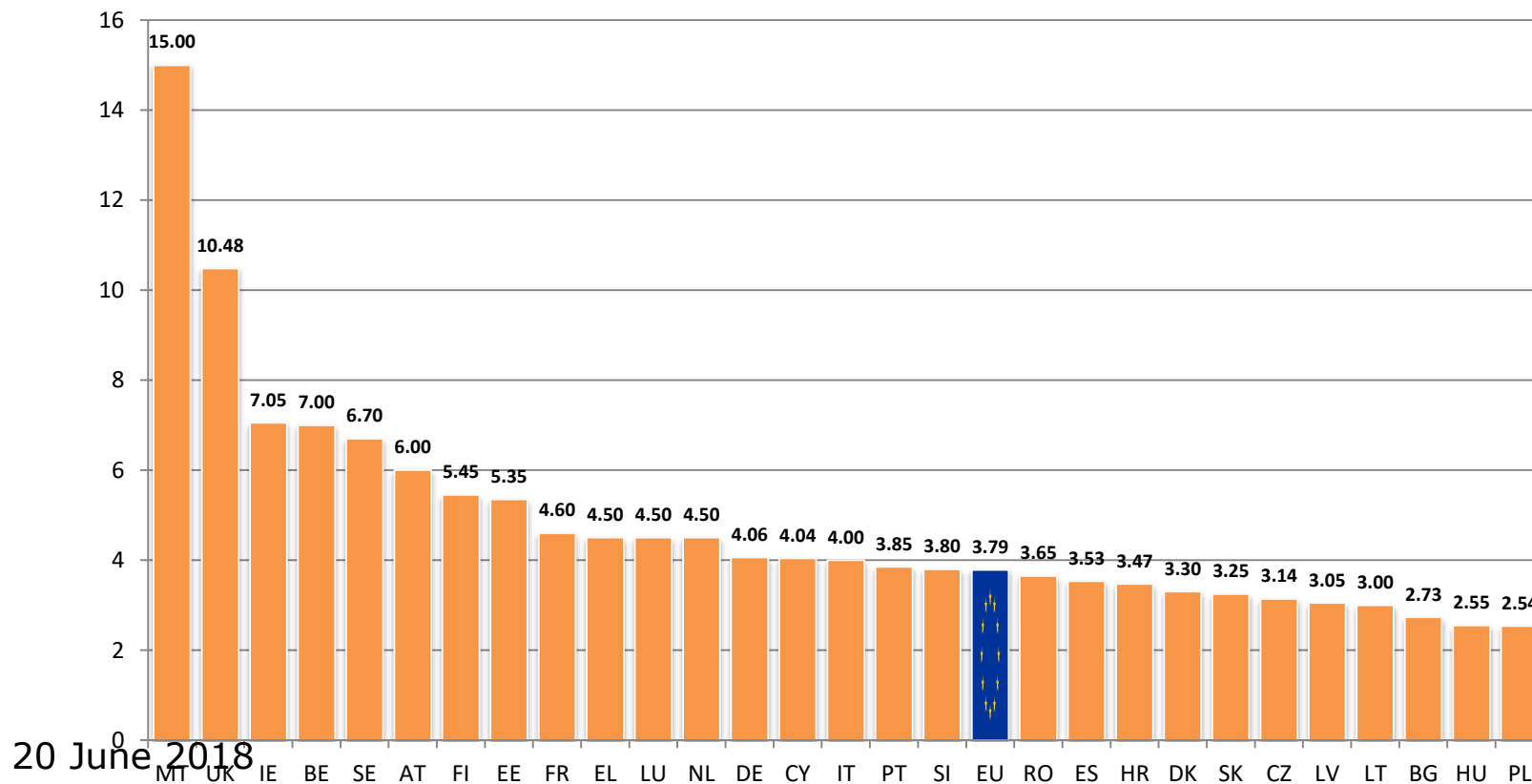
Honey Price

Price for multi-floral honey at the site of production
in Euro/Kg



Honey Price

Price for multi-floral honey in bulk at wholesalers
in Euro/Kg



Where to find data:

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