



Honey Market Presentation

***Civil Dialouge Group
6 November 2019***



Overview of EU honey market (1)

- EU second world producer (280 000 tons) after China
- Total number of beehives: 17.5 millions
- Total number of beekeepers: 650 000
- Small sector but important for agriculture for pollinisation



Overview of EU honey market (2)

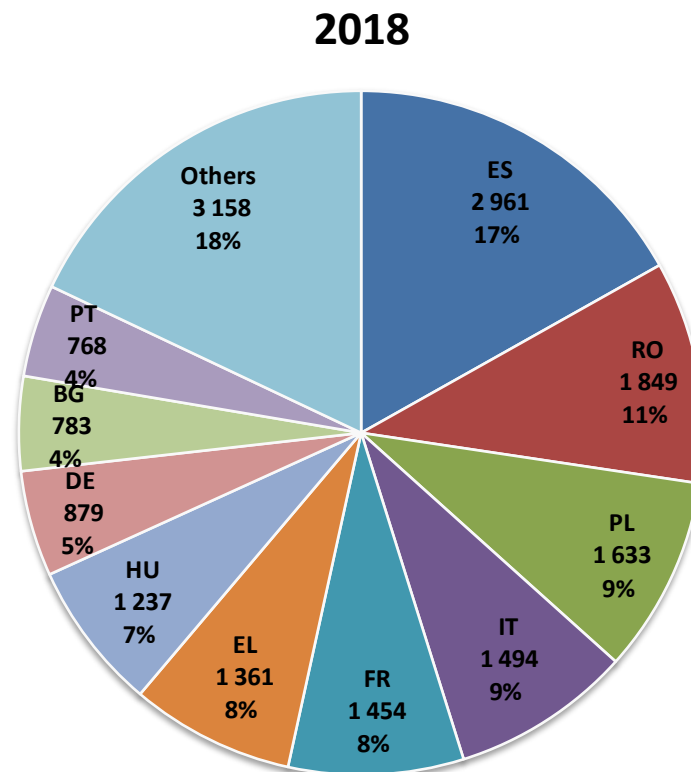
- EU is only 60% self-sufficient in honey
- Imports needed to cover EU domestic consumption
- Main supplier for imported honey: China (around 40% of EU imports), and Ukraine (20% of EU imports)
- EU honey trade balance largely negative: Imports > Exports



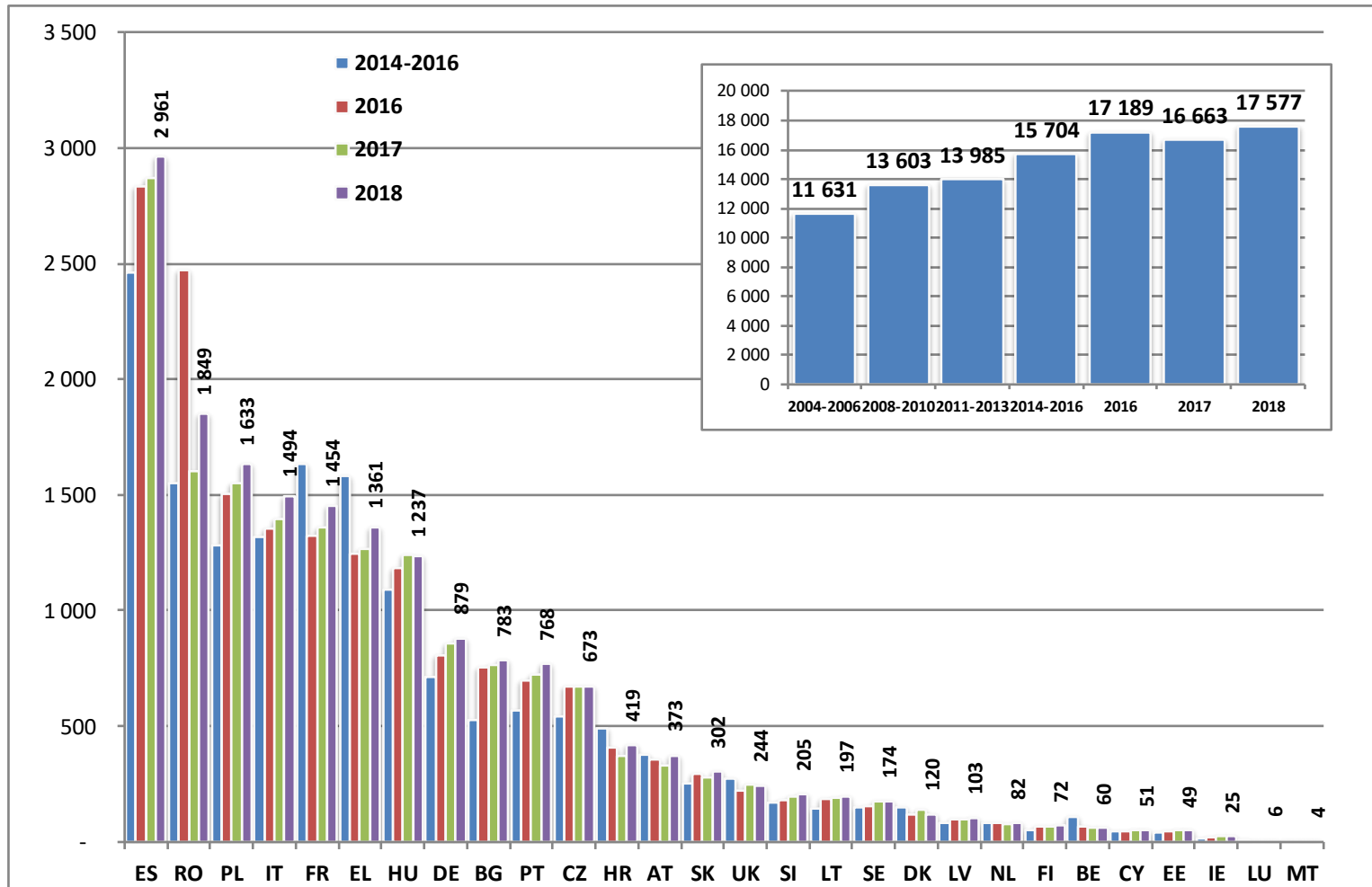
Number of hives (in thousand)



	2017	2018		
ES	2 868	2 961	↑	+3.2%
RO	1 603	1 849	↑	+15.3%
PL	1 553	1 633	↑	+5.2%
IT	1 396	1 494	↑	+7.0%
FR	1 360	1 454	↑	+6.9%
EL	1 264	1 361	↑	+7.6%
HU	1 239	1 237	↓	-0.2%
DE	859	879	↑	+2.3%
BG	766	783	↑	+2.3%
PT	721	768	↑	+6.4%
CZ	671	673	↑	+0.4%
HR	371	419	↑	+12.7%
AT	329	373	↑	+13.2%
SK	279	302	↑	+8.4%
UK	247	244	↓	-1.2%
SI	195	205	↑	+4.9%
LT	192	197	↑	+2.8%
SE	174	174	→	+0.0%
DK	141	120	↓	-14.9%
LV	96	103	↑	+6.8%
NL	78	82	↑	+4.6%
FI	67	72	↑	+7.9%
BE	59	60	↑	+0.8%
CY	50	51	↑	+3.2%
EE	50	49	↓	-2.4%
IE	23	25	↑	+5.8%
LU	6	6	↓	-1.5%
MT	4	4	↑	+2.8%
EU	16 663	17 577	↑	+5.5%



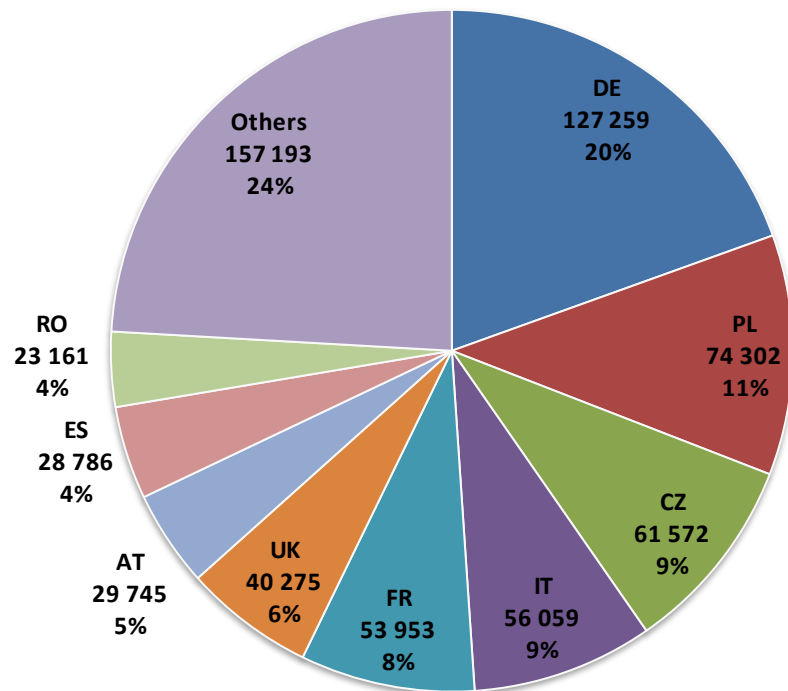
Number of hives (in thousand)



Number of beekeepers



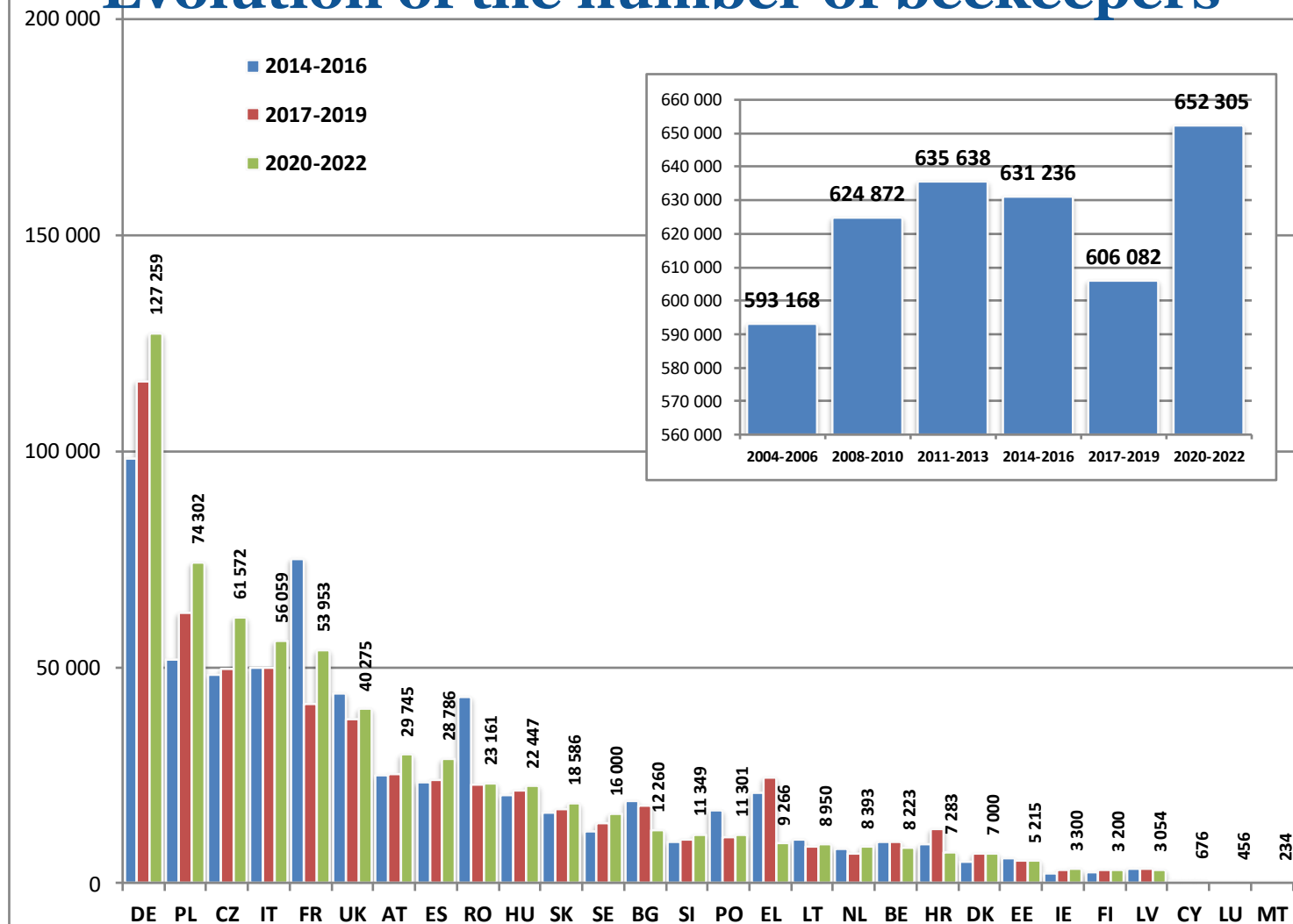
	2017-2019	2020-2022	
DE	116 000	127 259	↑ +9.7%
PL	62 575	74 302	↑ +18.7%
CZ	49 486	61 572	↑ +24.4%
IT	50 000	56 059	↑ +12.1%
FR	41 560	53 953	↑ +29.8%
UK	37 888	40 275	↑ +6.3%
AT	25 277	29 745	↑ +17.7%
ES	23 816	28 786	↑ +20.9%
RO	22 930	23 161	↑ +1.0%
HU	21 565	22 447	↑ +4.1%
SK	17 171	18 586	↑ +8.2%
SE	14 000	16 000	↑ +14.3%
BG	17 969	12 260	↓ -31.8%
SI	10 145	11 349	↑ +11.9%
PO	10 698	11 301	↑ +5.6%
EL	24 582	9 266	↓ -62.3%
LT	8 536	8 950	↑ +4.9%
NL	7 000	8 393	↑ +19.9%
BE	9 490	8 223	↓ -13.4%
HR	12 526	7 283	↓ -41.9%
DK	7 000	7 000	→ +0.0%
EE	5 250	5 215	↓ -0.7%
IE	3 000	3 300	↑ +10.0%
FI	3 100	3 200	↑ +3.2%
LV	3 282	3 054	↓ -6.9%
CY	691	676	↓ -2.2%
LU	337	456	↑ +35.3%
MT	208	234	↑ +12.5%
EU	606 082	652 305	↑ +7.6%



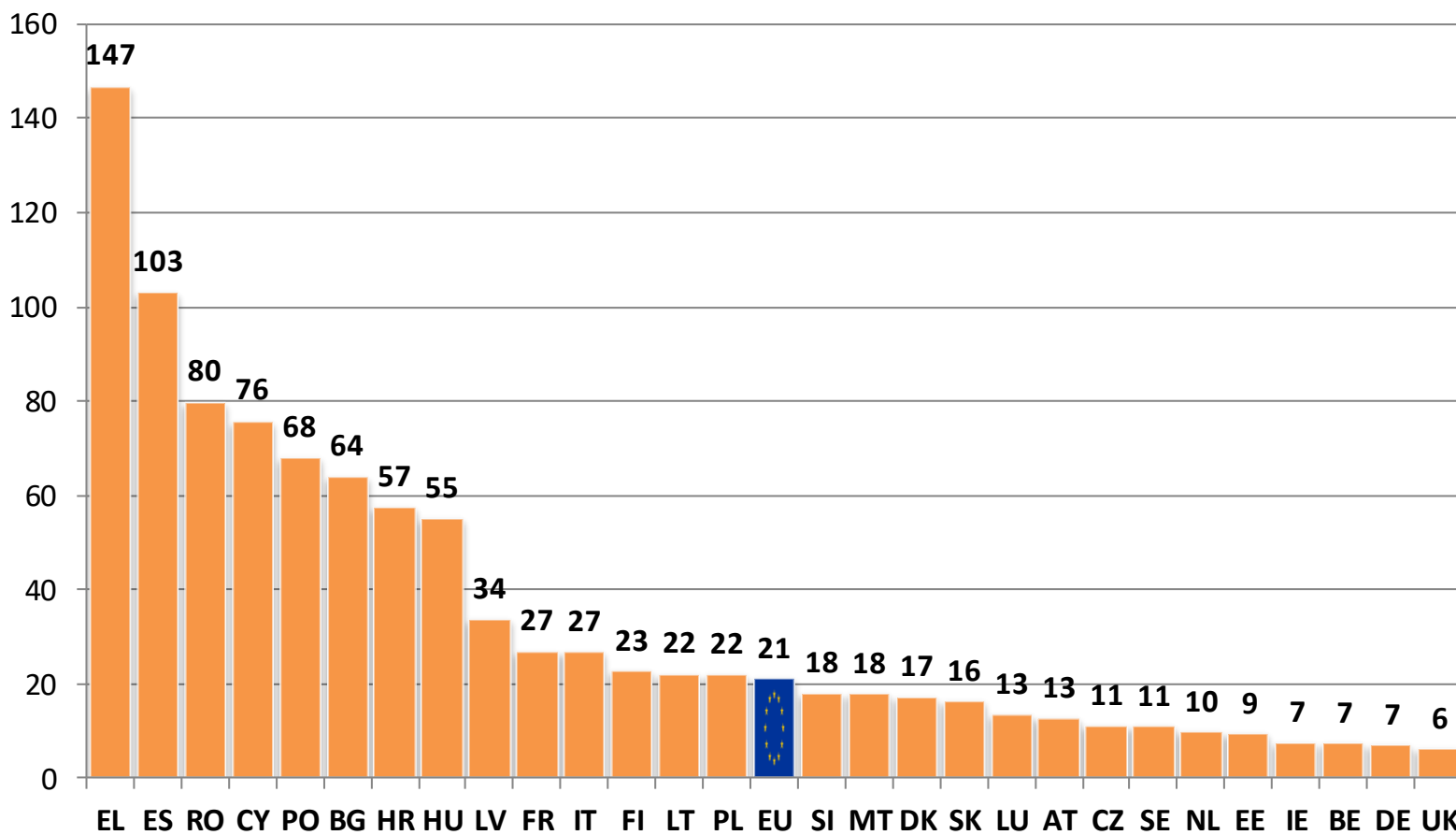
Number of beekeepers



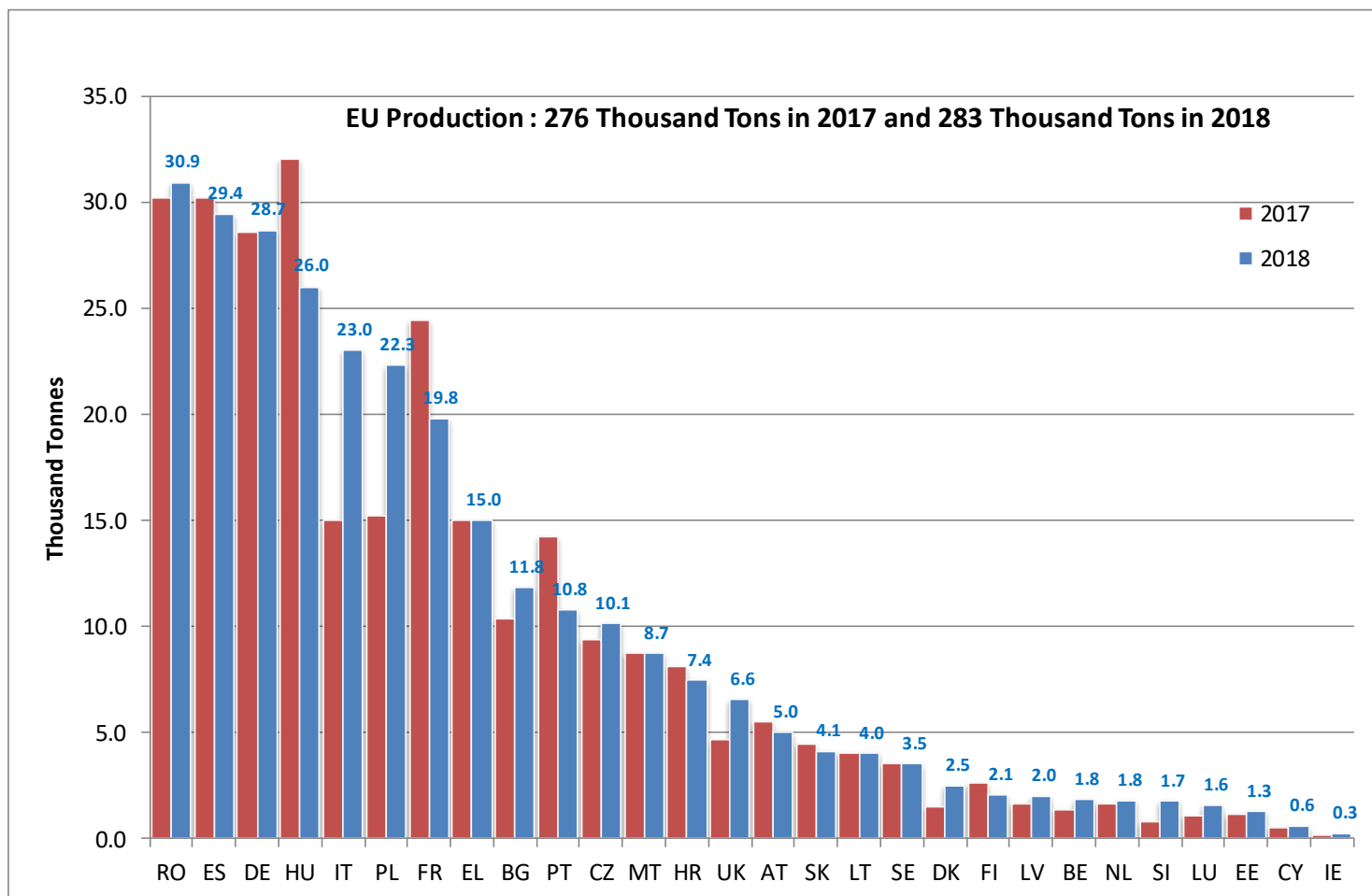
Evolution of the number of beekeepers



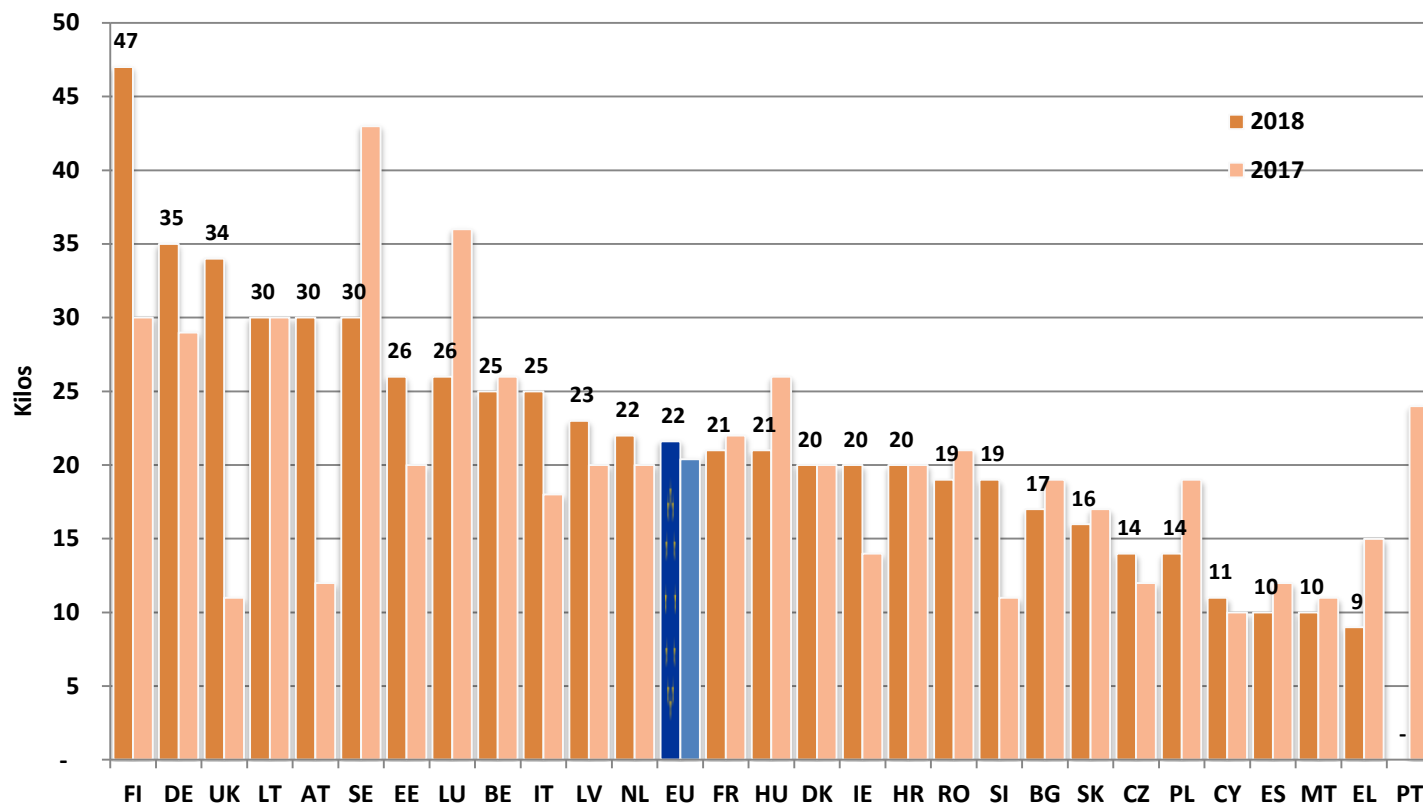
Average Number of Hives per Beekeeper (2018)



EU Honey Production



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

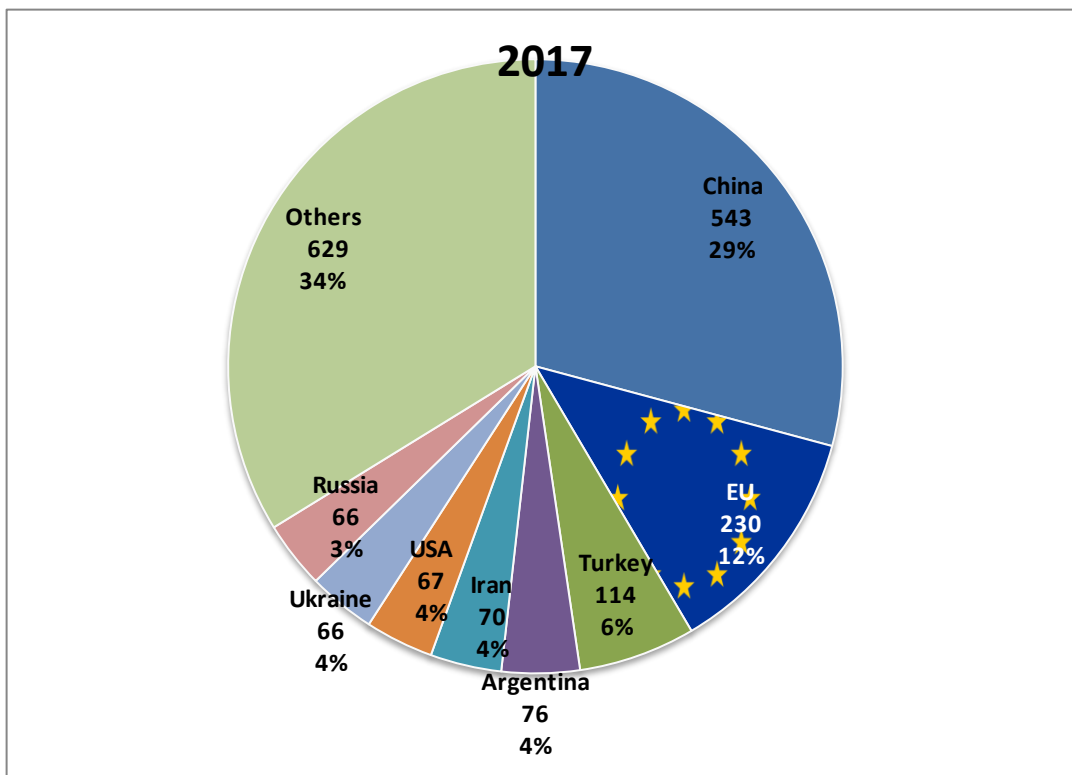


source: MS NAP

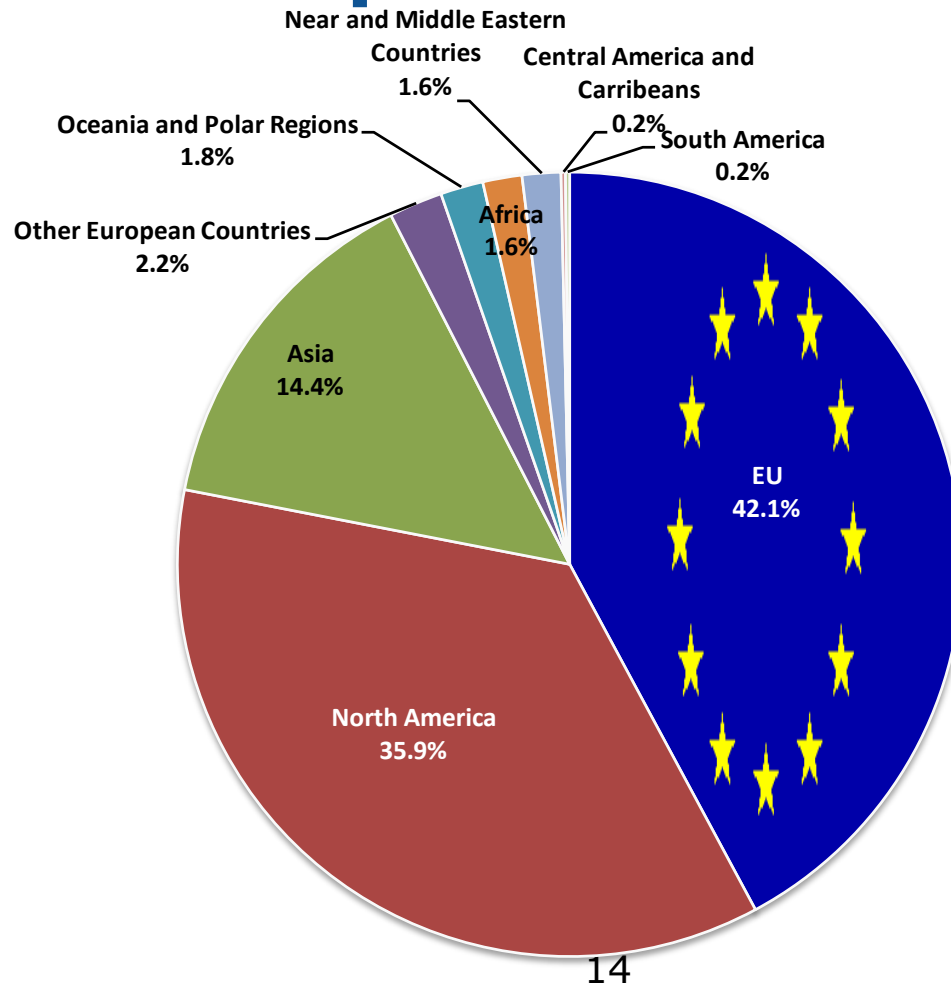
World Production of Honey per Country (1 000 T)

	2016	2017	Share of World Production
China	555	543	29%
EU	230	230	12%
Turkey	106	114	6%
Argentina	68	76	4%
Iran	68	70	4%
USA	73	67	4%
Ukraine	59	66	4%
Russia	70	66	4%
India	64	65	3%
Mexico	55	51	3%
Ethiopia	48	50	3%
Brazil	40	42	2%
Canada	39	39	2%
United Republic of	30	30	2%
Republic of Korea	26	27	1%
Angola	23	23	1%
Uruguay	20	20	1%
Viet Nam	17	19	1%
Kenya	26	18	1%
Central African	16	16	1%
Mali	11	15	1%
New Zealand	20	15	1%
Australia	13	13	1%
Other	182	186	10%
	1 859	1 861	

Source : FAO



Share of Imports of Honey in 2017



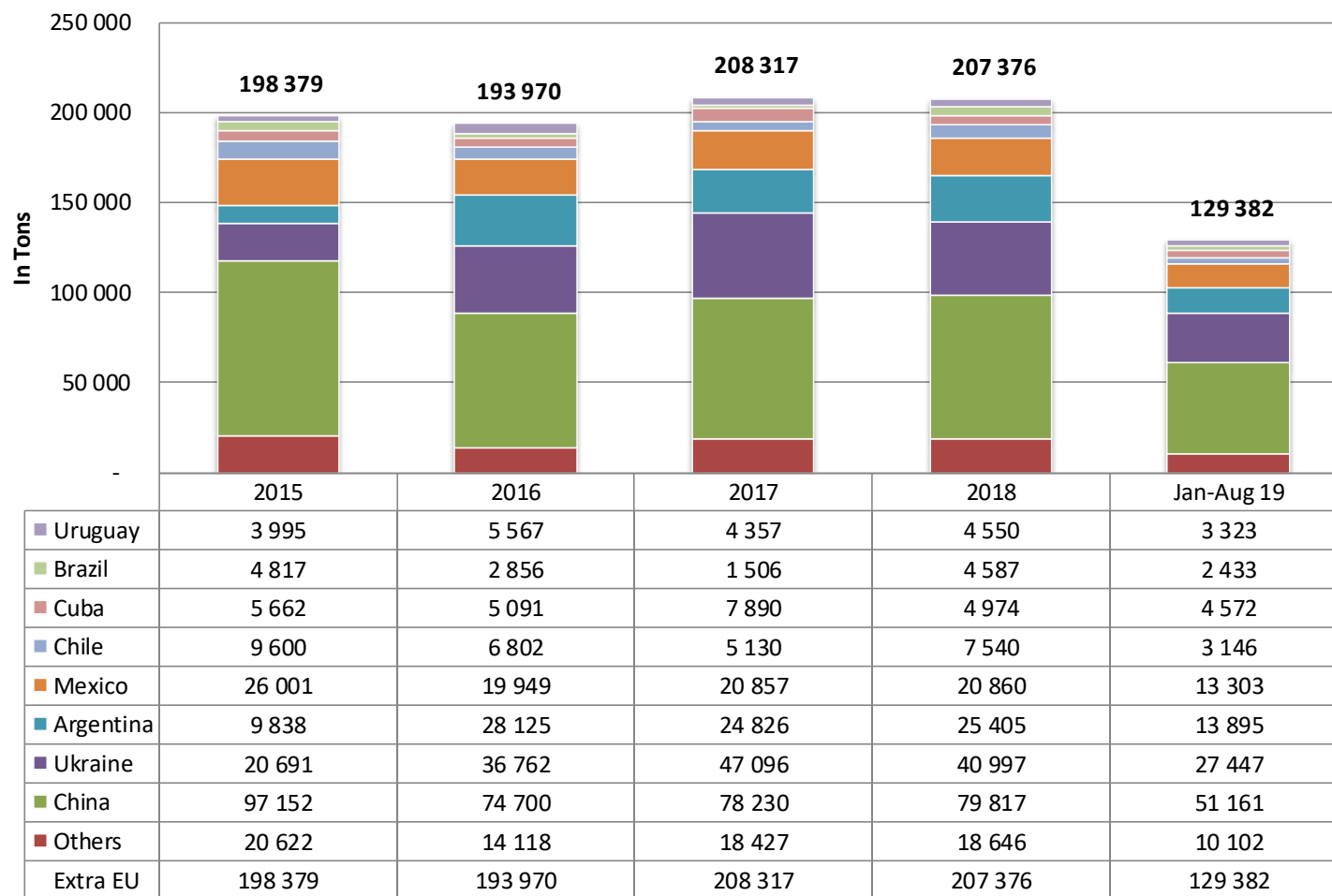
Source : UN Comtrade

World Imports of Honey

	2017		2018		Share of World Imports	
	Tons	1 000 €	Tons	1 000 €	Tons	1 000 €
European Union	208 317	457 218	207 376	451 085	38.5%	33.8%
North America	204 416	532 155	202 309	451 710	37.6%	33.8%
<i>of which USA</i>	202 565	503 411	201 577	426 854	37.4%	32.0%
Asia	72 134	319 544	62 333	211 508	11.6%	15.8%
<i>of which Japan</i>	42 821	126 573	44 521	123 068	8.3%	9.2%
<i>China</i>	5 682	80 896	-	-	0.0%	0.0%
Near and Middle Eastern Countries	33 582	112 904	31 827	116 741	5.9%	8.7%
Oceania and Polar Regions	8 713	41 777	15 588	45 500	2.9%	3.4%
Other European Countries	11 006	43 165	11 545	46 234	2.1%	3.5%
Africa	10 311	17 841	6 669	9 826	1.2%	0.7%
South America	840	2 205	610	1 562	0.1%	0.1%
Central America and Carribeans	912	2 374	272	701	0.1%	0.1%
Total	550 231	1 529 185	538 529	1 334 867		

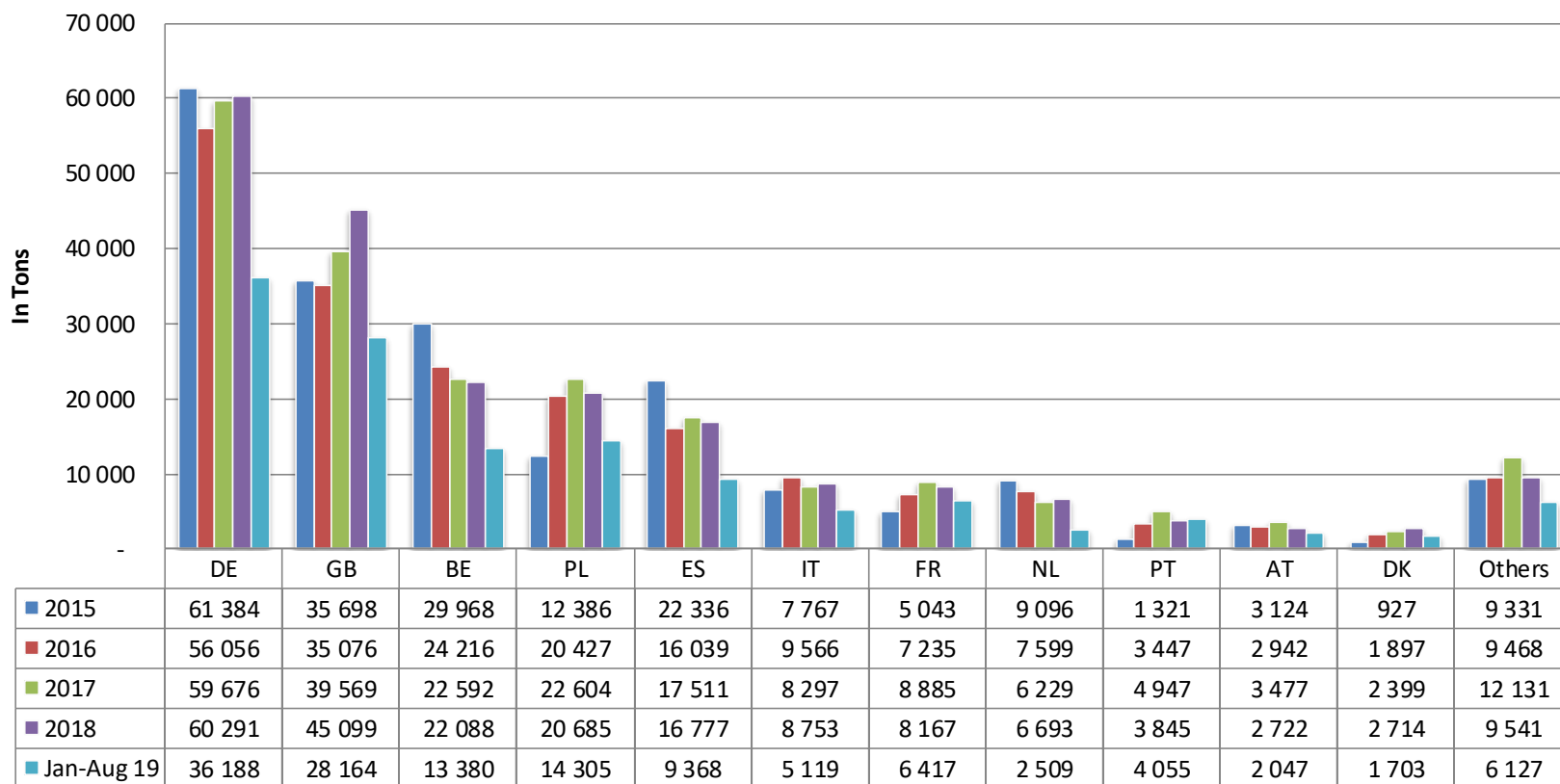
Source : UN Comtrade

EU Imports of Honey by Origin (in Tons)



Source : Eurostat Comext

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



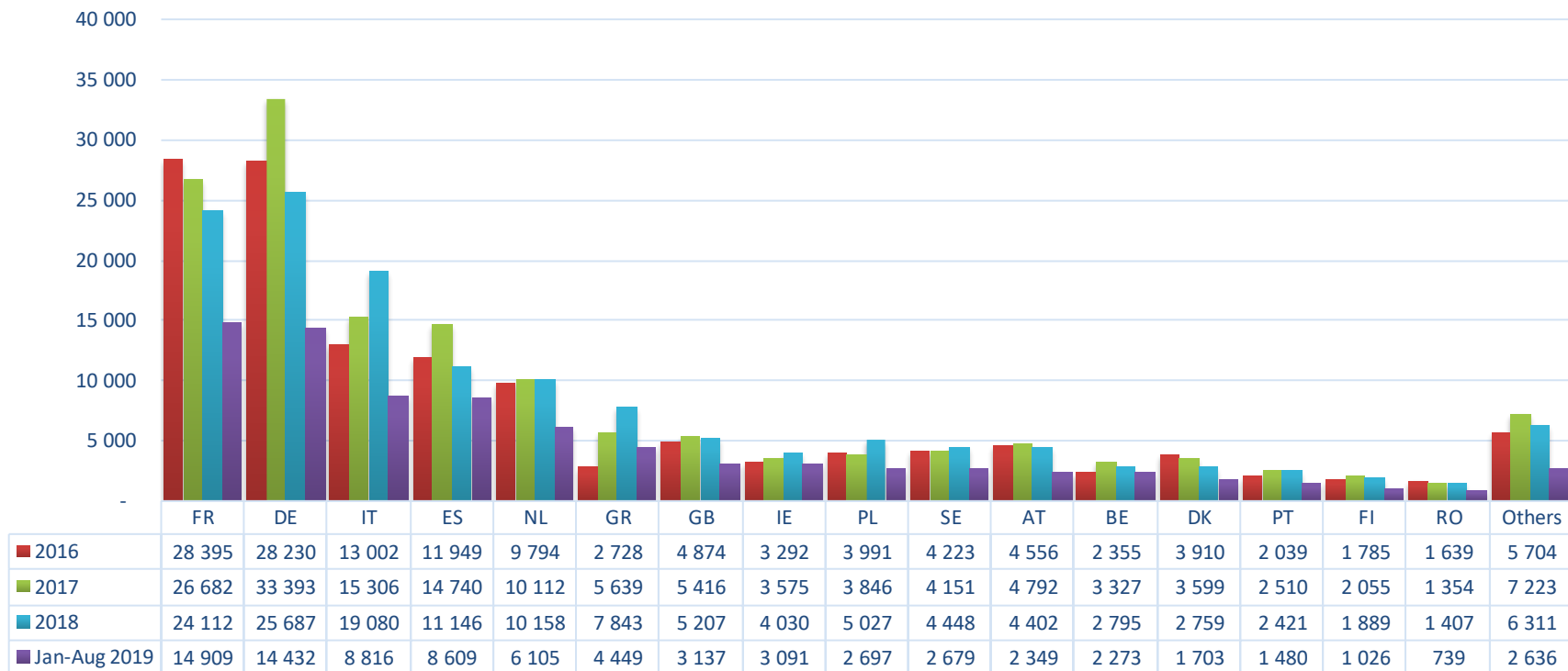
Source : Eurostat Comext

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

	2016	2017	2018	2019	
China	1.58	1.46	1.30	1.24	↓ -4.1%
Ukraine	1.76	1.74	1.83	1.69	↓ -8.1%
Argentina	2.12	2.23	2.34	2.30	↓ -2.0%
Mexico	2.96	2.80	2.82	2.59	↓ -8.3%
Cuba	2.42	2.34	2.40	2.05	↓ -14.7%
Uruguay	2.15	2.36	2.26	2.04	↓ -9.8%
Chile	2.77	2.89	2.96	2.72	↓ -8.1%
Brazil	3.25	3.84	3.34	2.82	↓ -15.8%
Moldova	2.59	2.49	2.47	2.75	↑ +11.3%
Turkey	4.01	3.76	3.87	3.28	↓ -15.2%
New Zealand	24.10	23.36	23.53	21.51	↓ -8.6%
Vietnam	1.62	1.64	1.42	1.37	↓ -3.5%
Serbia	3.72	3.06	3.73	3.18	↓ -14.8%
Nicaragua	3.68	3.82	3.89	3.09	↓ -20.5%
India	2.59	2.26	1.67	1.71	↑ +2.4%
Extra EU	2.23	2.19	2.18	2.03	↓ -6.8%
Extra EU (excl. NZ)	2.13	2.08	2.08	1.92	↓ -7.6%

Source : Eurostat Comext

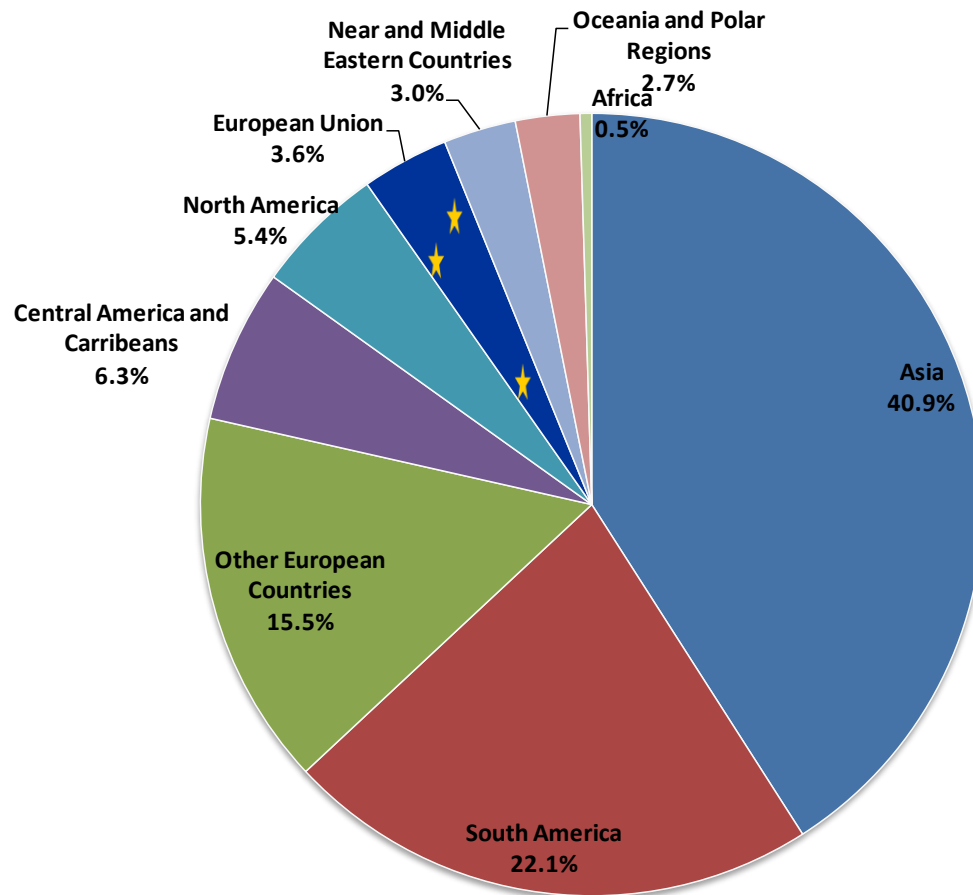
Intra EU Imports of Honey in Tons



Source : Eurostat Comext

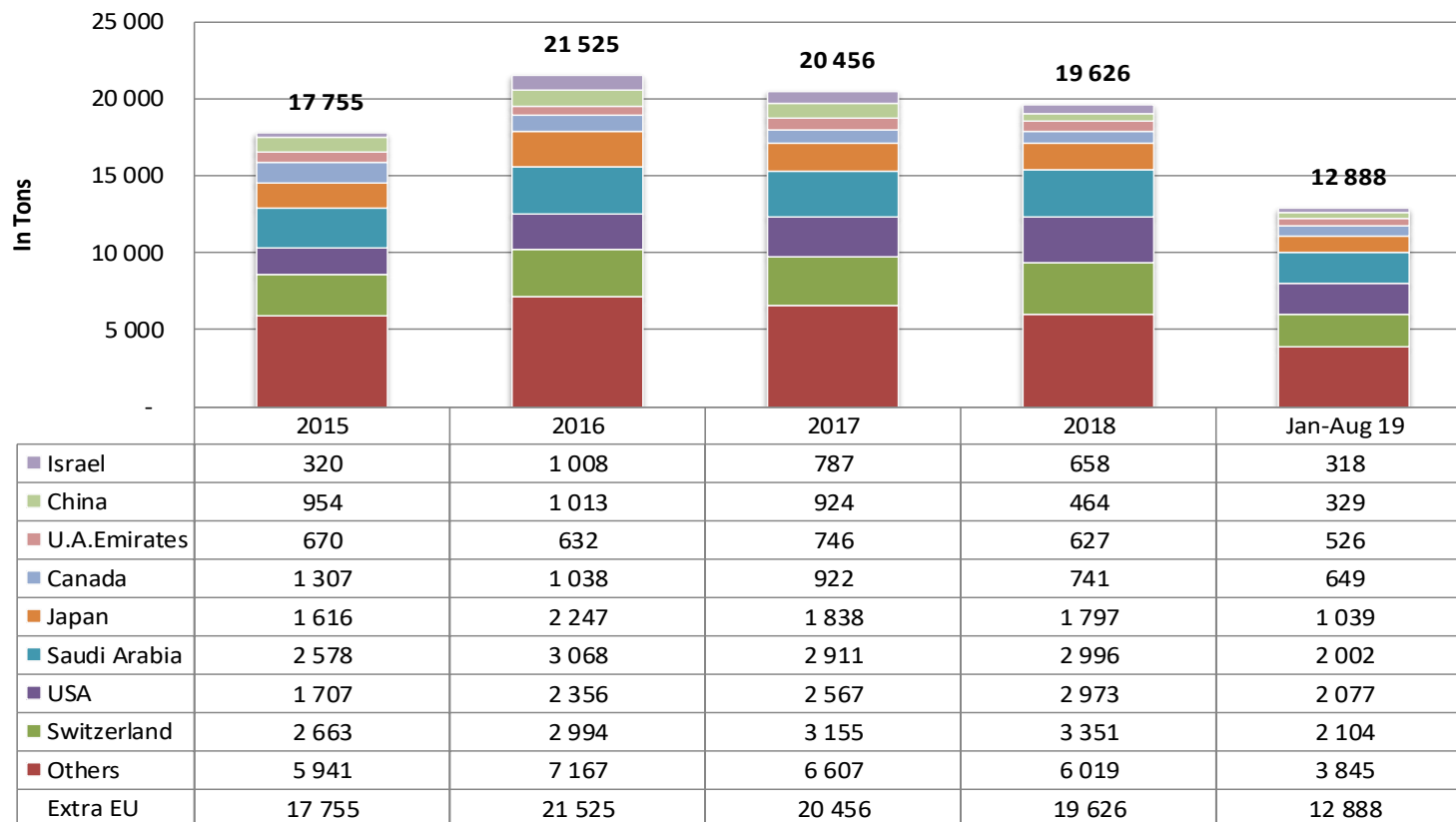
■ 2016 ■ 2017 ■ 2018 ■ Jan-Aug 2019

Share of Exports of Honey in 2017



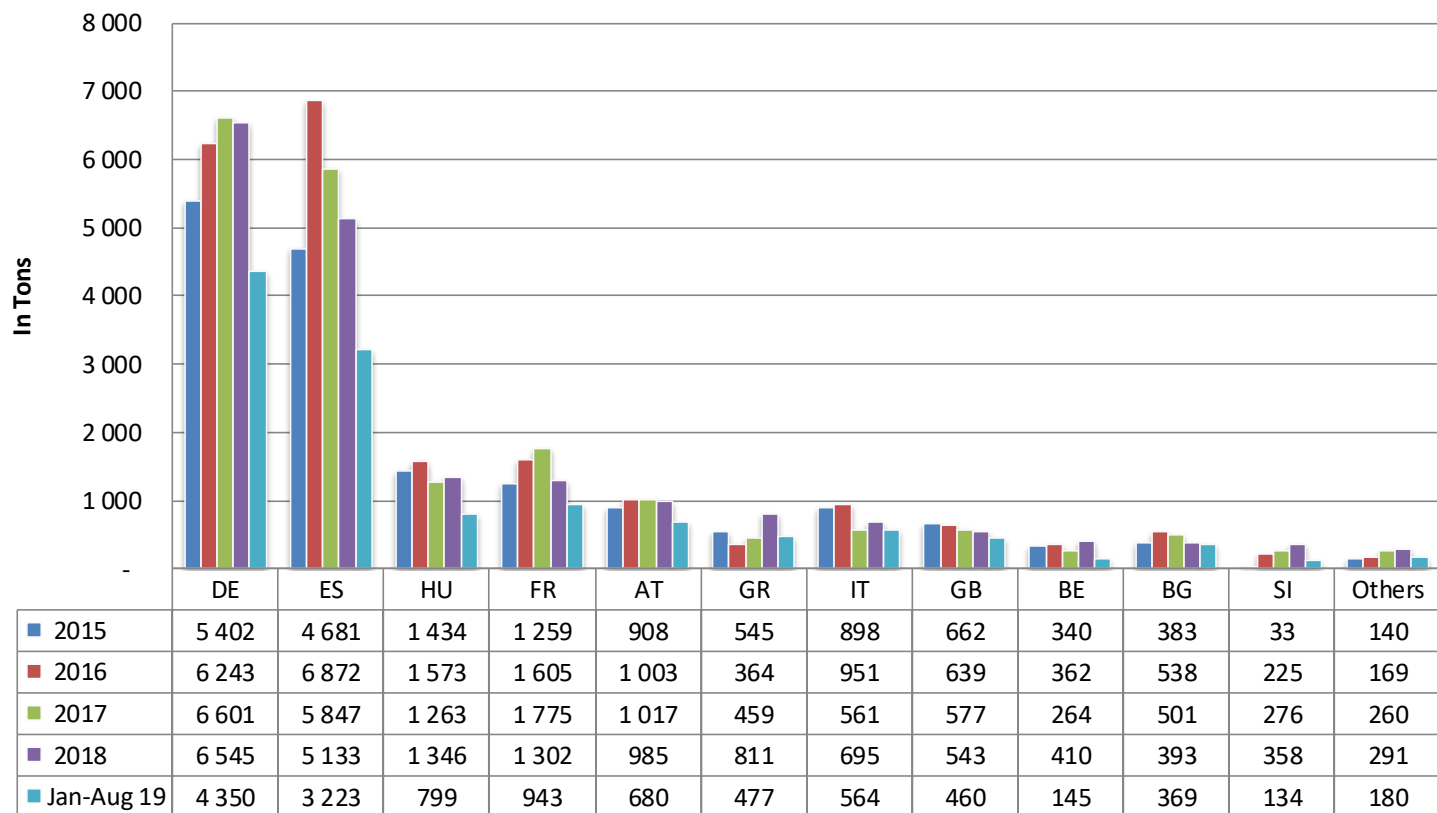
Source : UN Comtrade

EU Exports of Honey by Destinations



Source : Eurostat Comext

Member States Share of Export to Third Countries



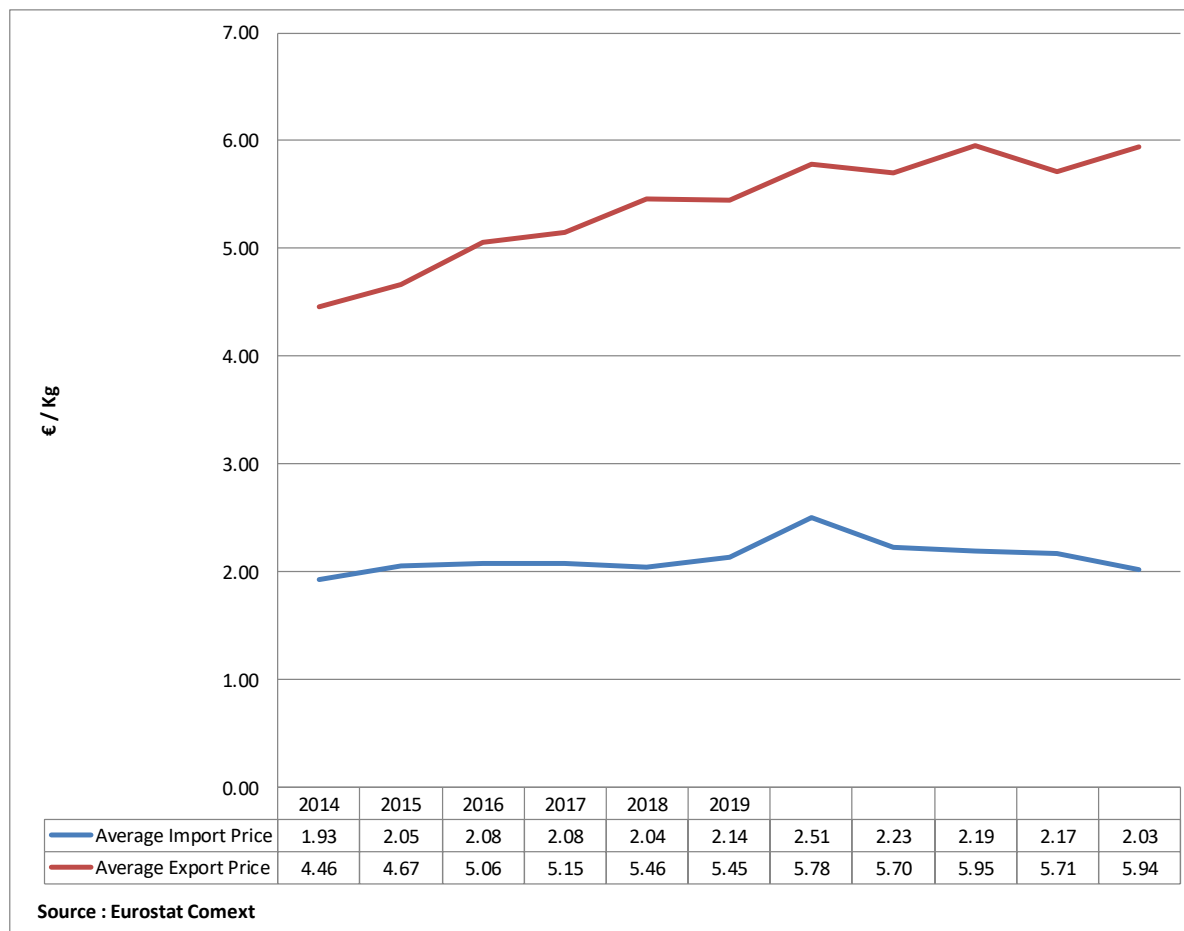
Source : Eurostat Comext

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

	2016	2017	2018	2019		
Switzerland	5.52	5.57	5.55	5.52	↓	-0.5%
USA	7.09	7.37	6.45	6.68	↑	+3.7%
Saudi Arabia	7.61	7.84	6.92	7.58	↑	+9.5%
Japan	5.53	5.66	5.55	5.84	↑	+5.1%
Canada	3.78	3.73	4.13	3.75	↓	-9.1%
U.A.Emir	8.44	8.37	7.95	7.79	↓	-2.0%
China	5.67	5.79	6.00	6.10	↑	+1.7%
Israel	2.90	3.03	3.02	3.12	↑	+3.5%
Algeria	4.66	5.46	3.25	3.36	↑	+3.5%
Morocco	2.13	1.98	1.97	2.60	↑	+32.0%
Norway	5.99	5.17	6.12	5.44	↓	-11.2%
Ceuta	2.58	3.35	3.97	3.29	↓	-17.1%
Iraq	6.08	5.48	6.39	6.42	↑	+0.5%
Hong Kong	6.52	6.51	7.08	7.17	↑	+1.2%
Jordan	5.11	4.86	5.11	5.15	↑	+0.8%
Extra EU	5.74	6.01	5.78	5.94	↑	+2.8%

Source : Eurostat Comext

Average Import and Export Prices



Where to find data:

New homepage

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