



# 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)

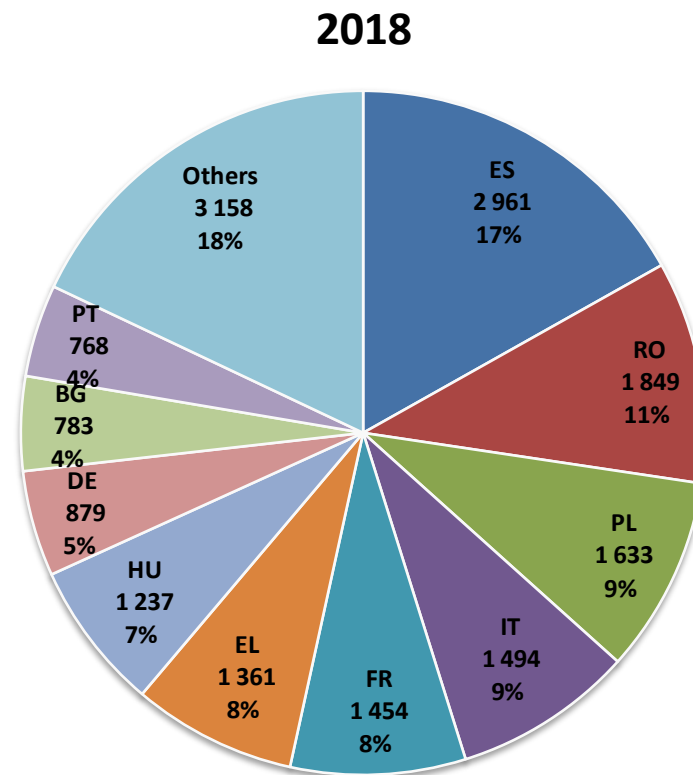
- EU is only 60% self-sufficient in honey
- Imports needed to cover EU domestic consumption
- Main supplier for imported honey: China (around 40% of EU imports), and Ukraine (20% of EU imports)
- EU honey trade balance largely negative: Imports > Exports



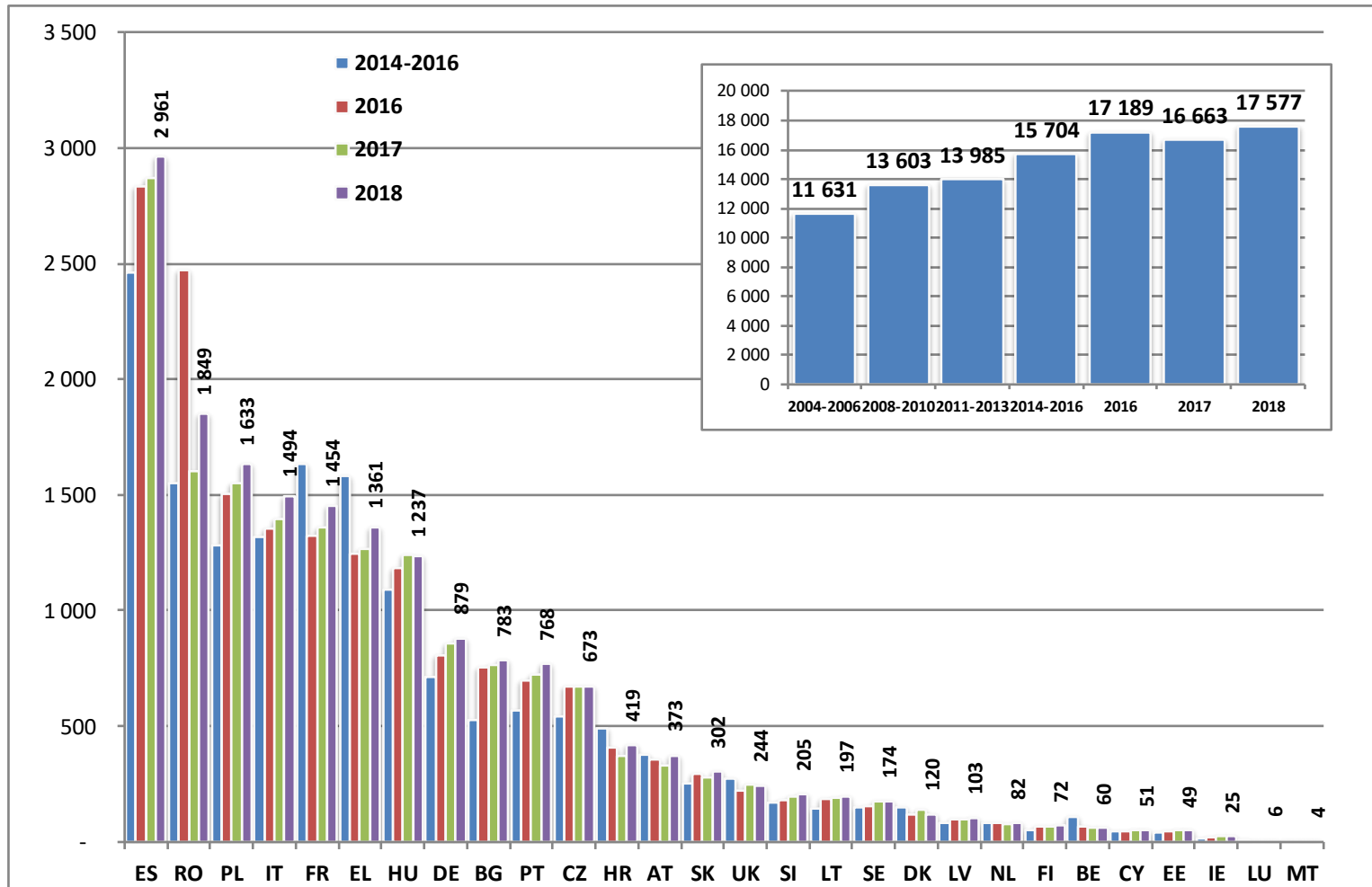
# Number of hives (in thousand)



	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%



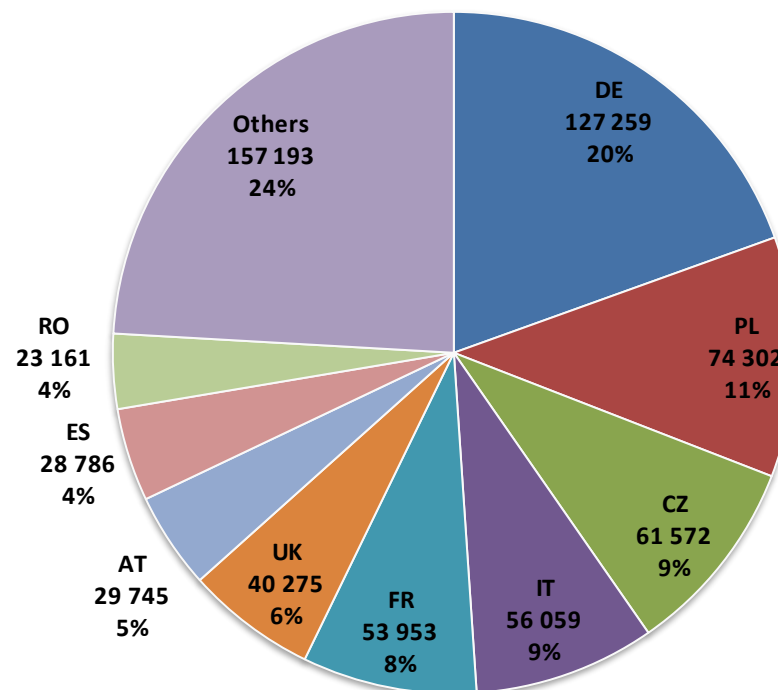
# Number of hives (in thousand)



# 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%

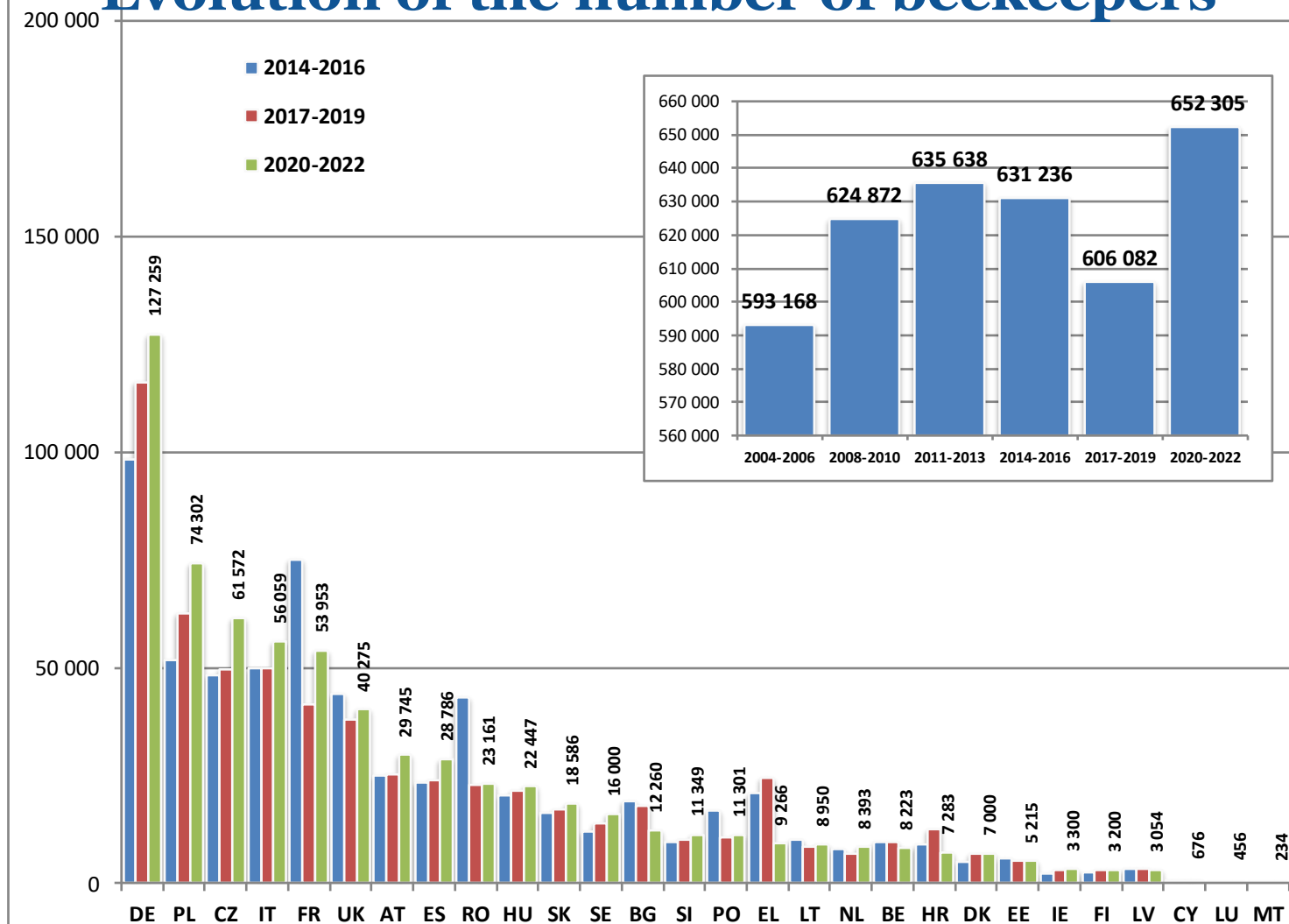




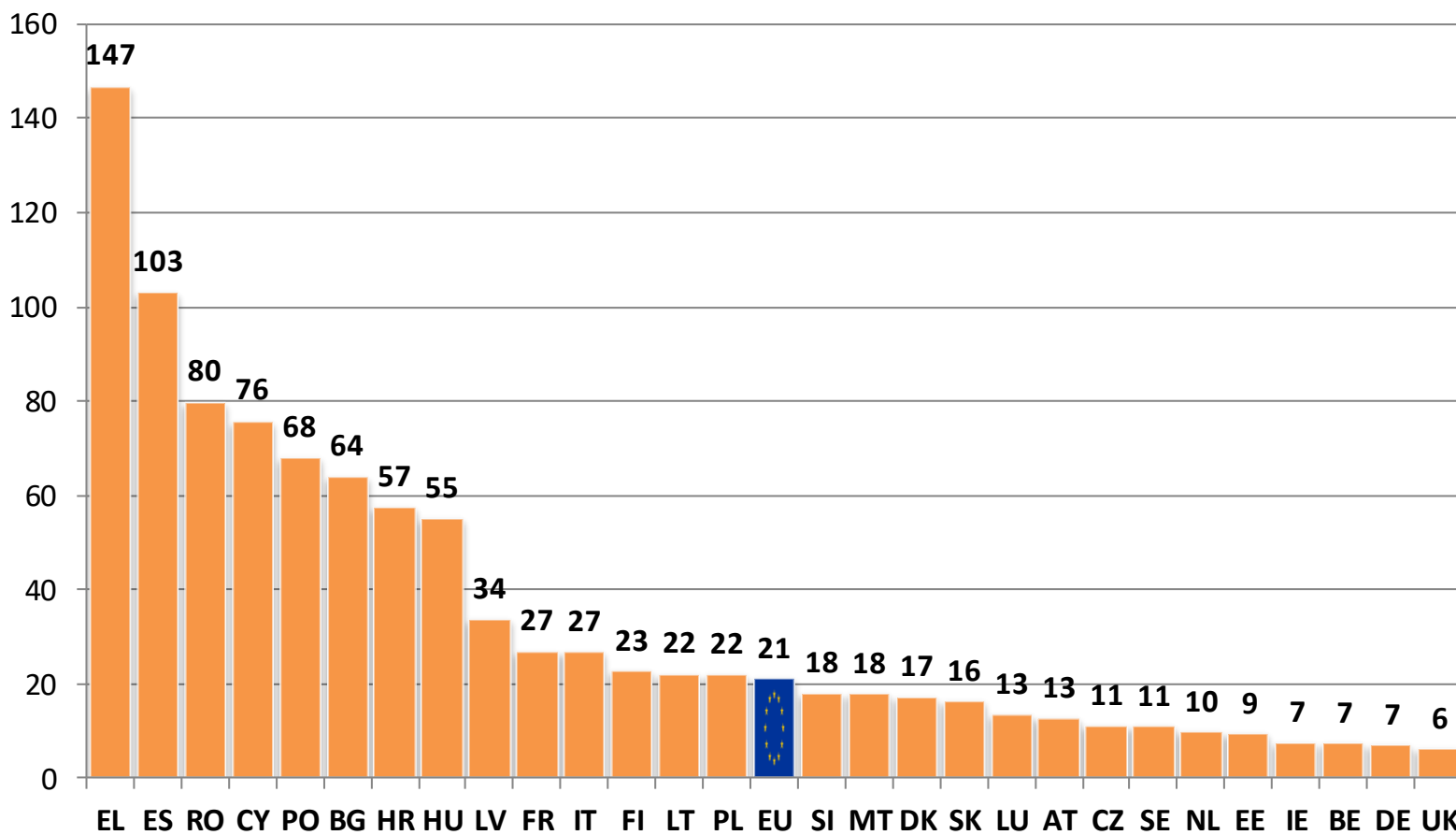
# Number of beekeepers



## Evolution of the number of beekeepers

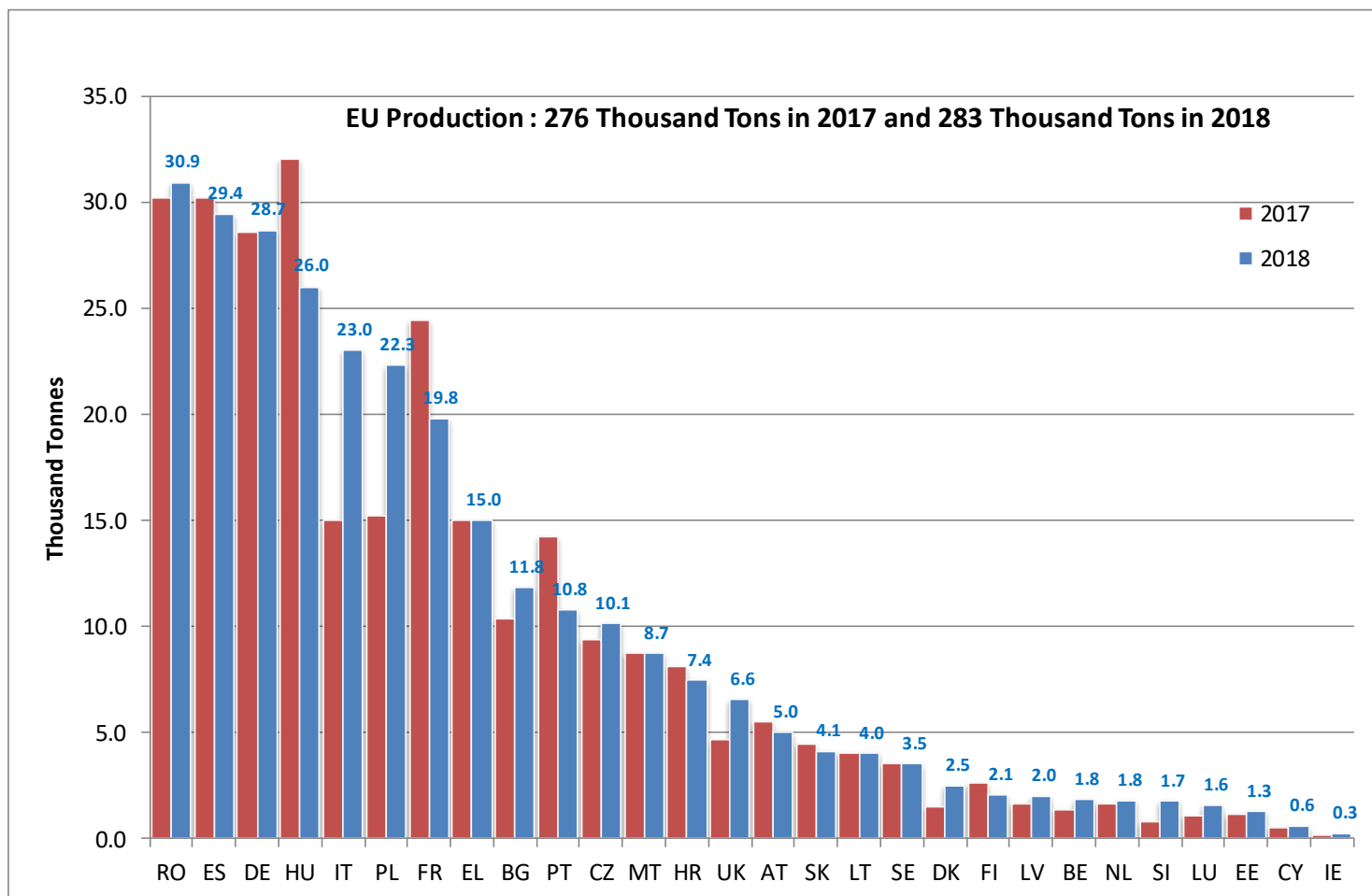


## Average Number of Hives per Beekeeper (2018)

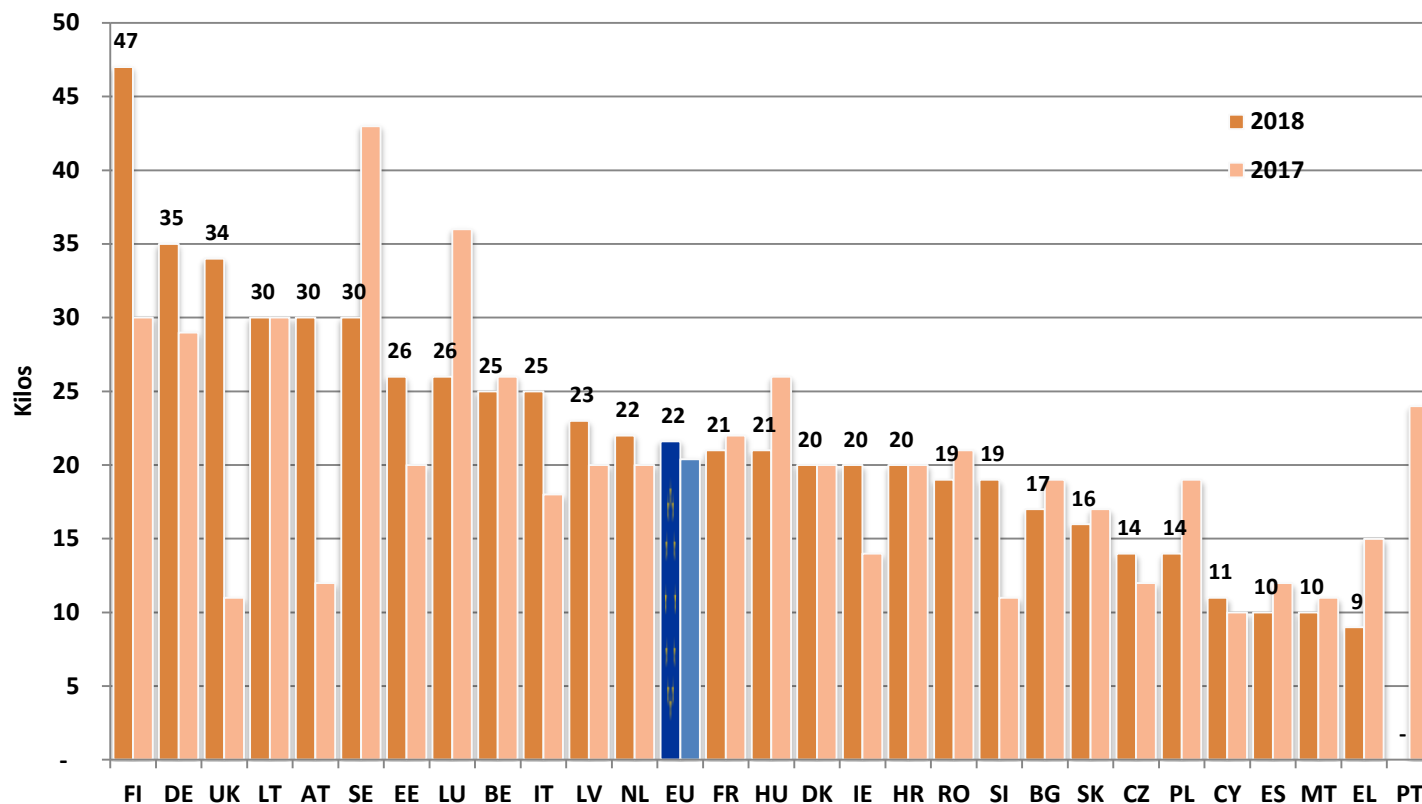




# EU Honey Production



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

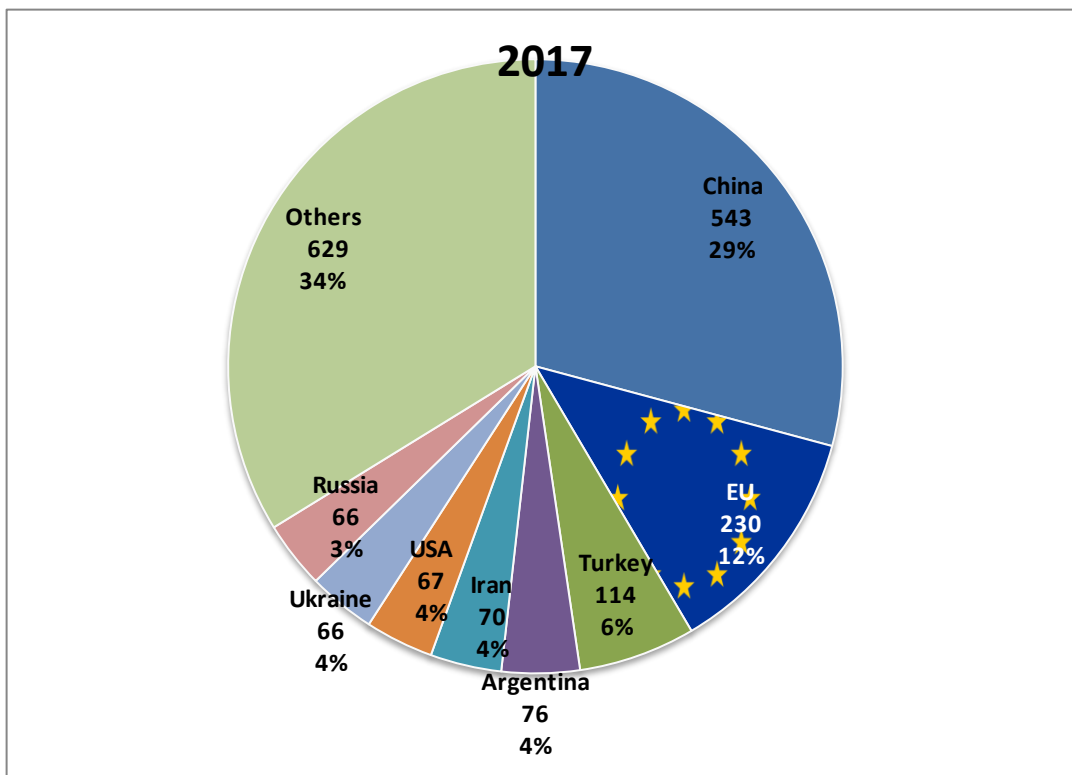


source: MS NAP

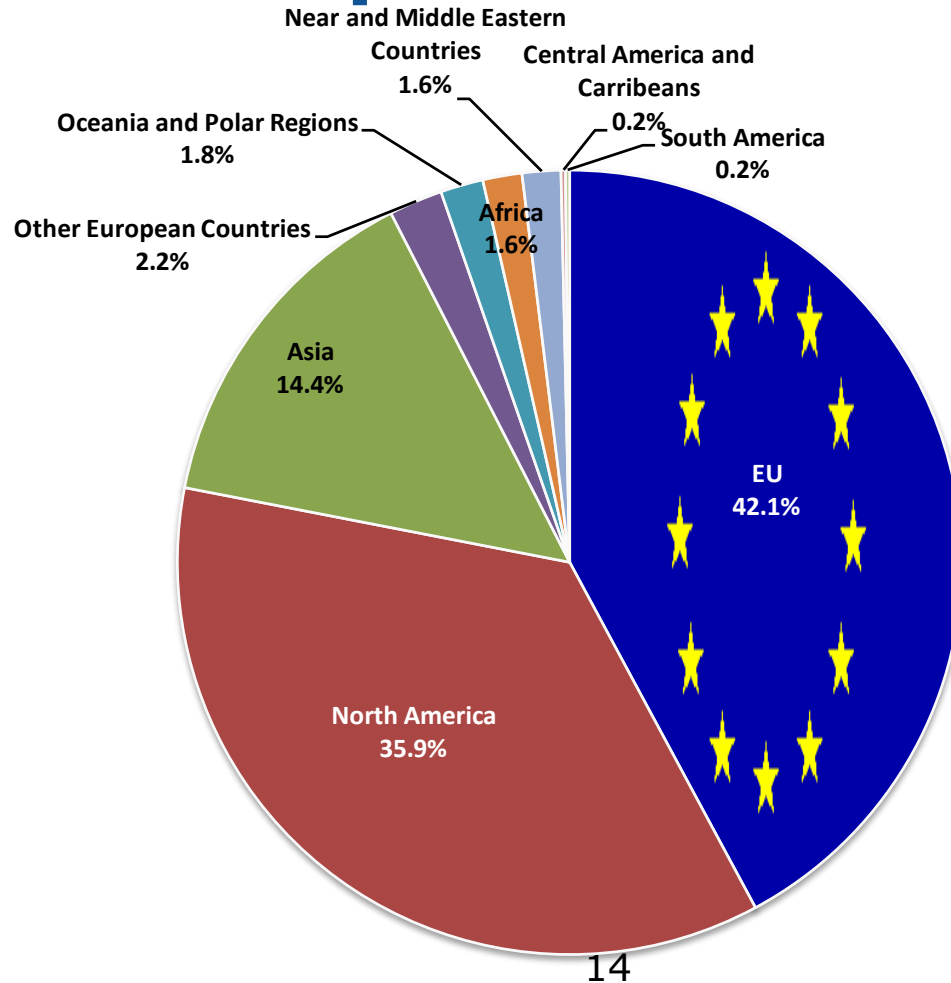
# World Production of Honey per Country (1 000 T)

	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 Republic of Korea	30	30	2%
Angola	26	27	1%
Uruguay	23	23	1%
Viet Nam	20	20	1%
Kenya	17	19	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



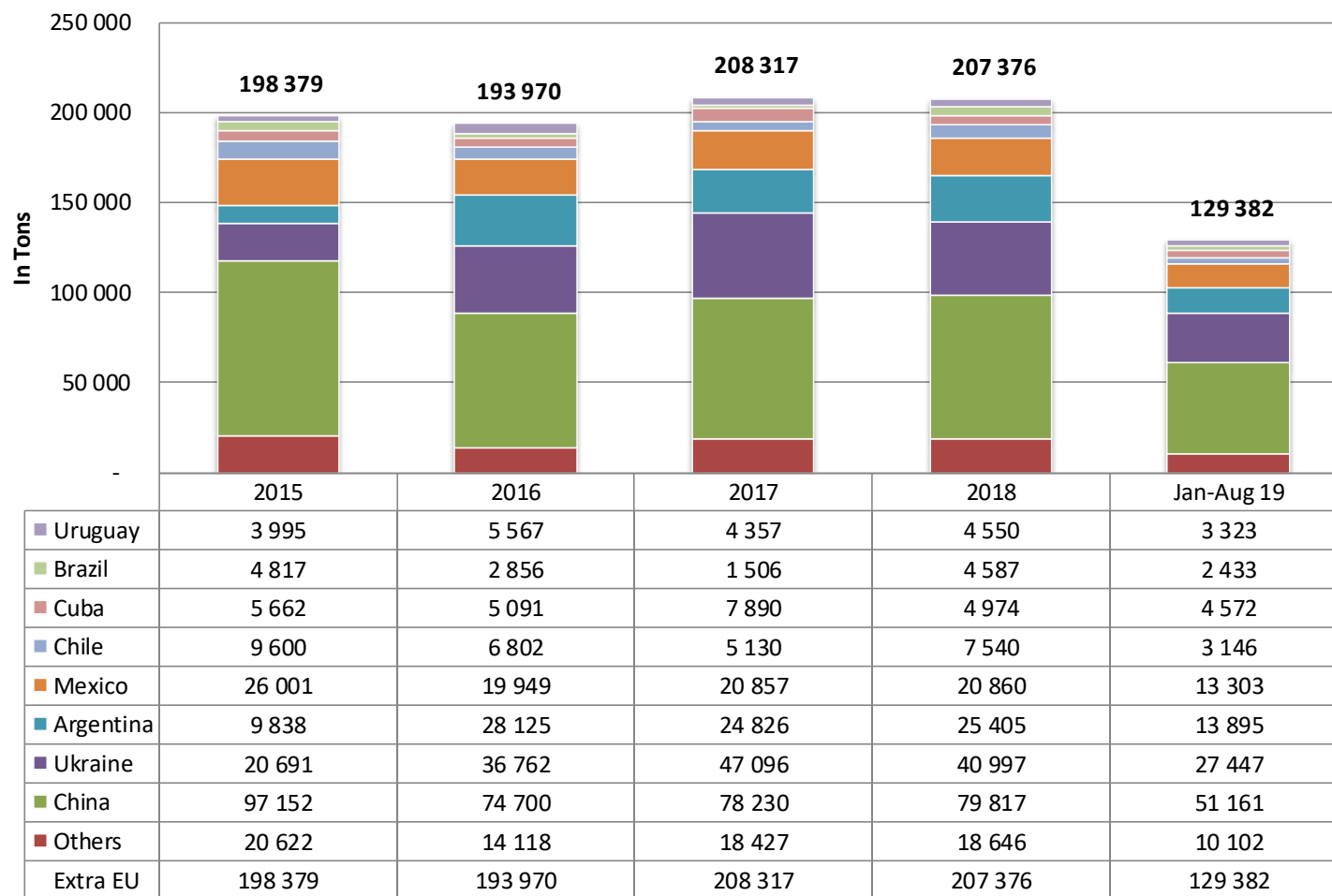
Source : UN Comtrade

# World Imports of Honey

	2017		2018		Share of World Imports	
	Tons	1 000 €	Tons	1 000 €	Tons	1 000 €
<b>European Union</b>	208 317	457 218	207 376	451 085	38.5%	33.8%
<b>North America</b>	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%
<b>Asia</b>	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%
<b>Near and Middle Eastern Countries</b>	33 582	112 904	31 827	116 741	5.9%	8.7%
<b>Oceania and Polar Regions</b>	8 713	41 777	15 588	45 500	2.9%	3.4%
<b>Other European Countries</b>	11 006	43 165	11 545	46 234	2.1%	3.5%
<b>Africa</b>	10 311	17 841	6 669	9 826	1.2%	0.7%
<b>South America</b>	840	2 205	610	1 562	0.1%	0.1%
<b>Central America and Carribeans</b>	912	2 374	272	701	0.1%	0.1%
<b>Total</b>	<b>550 231</b>	<b>1 529 185</b>	<b>538 529</b>	<b>1 334 867</b>		

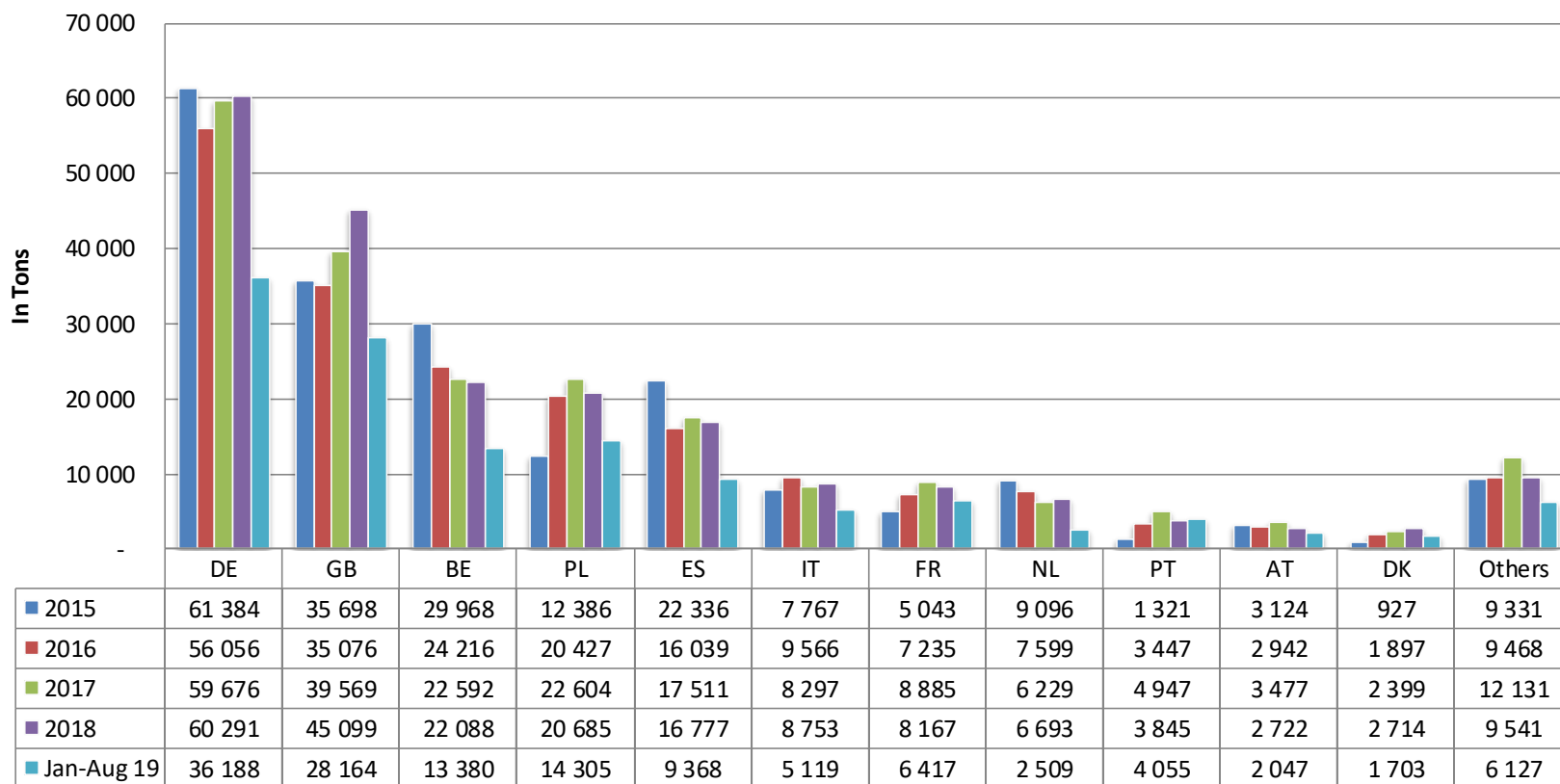
Source : UN Comtrade

# EU Imports of Honey by Origin (in Tons)



Source : Eurostat Comext

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



Source : Eurostat Comext

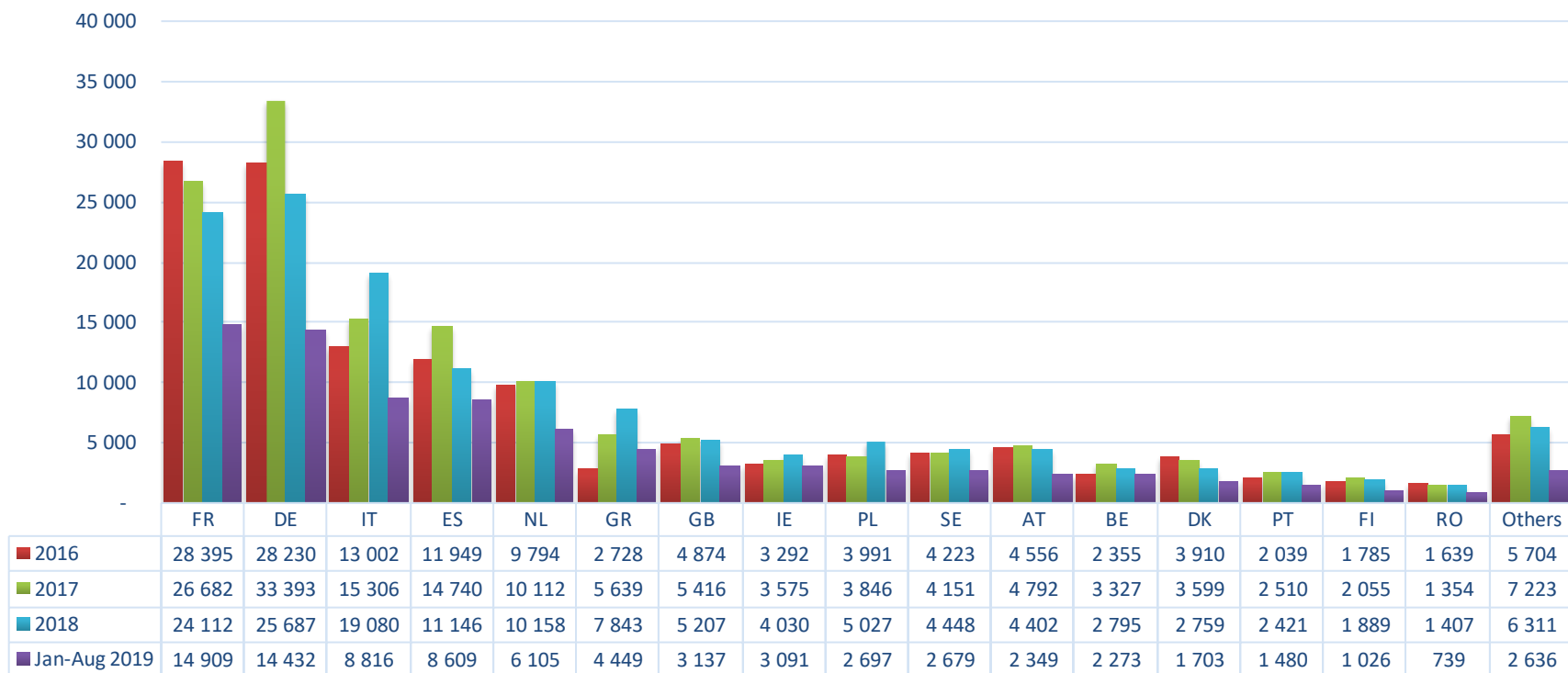


## EU Average Unit Value for Imported Honey (€/Kg) by Origin

	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

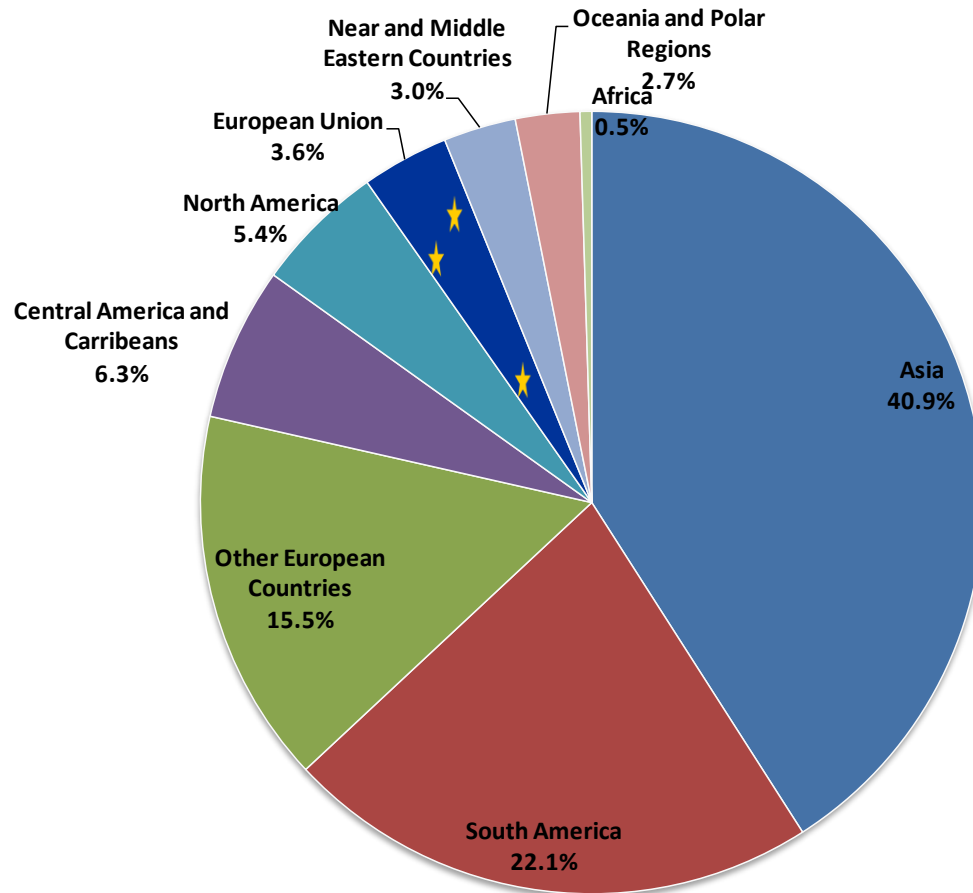
## Intra EU Imports of Honey in Tons



Source : Eurostat Comext

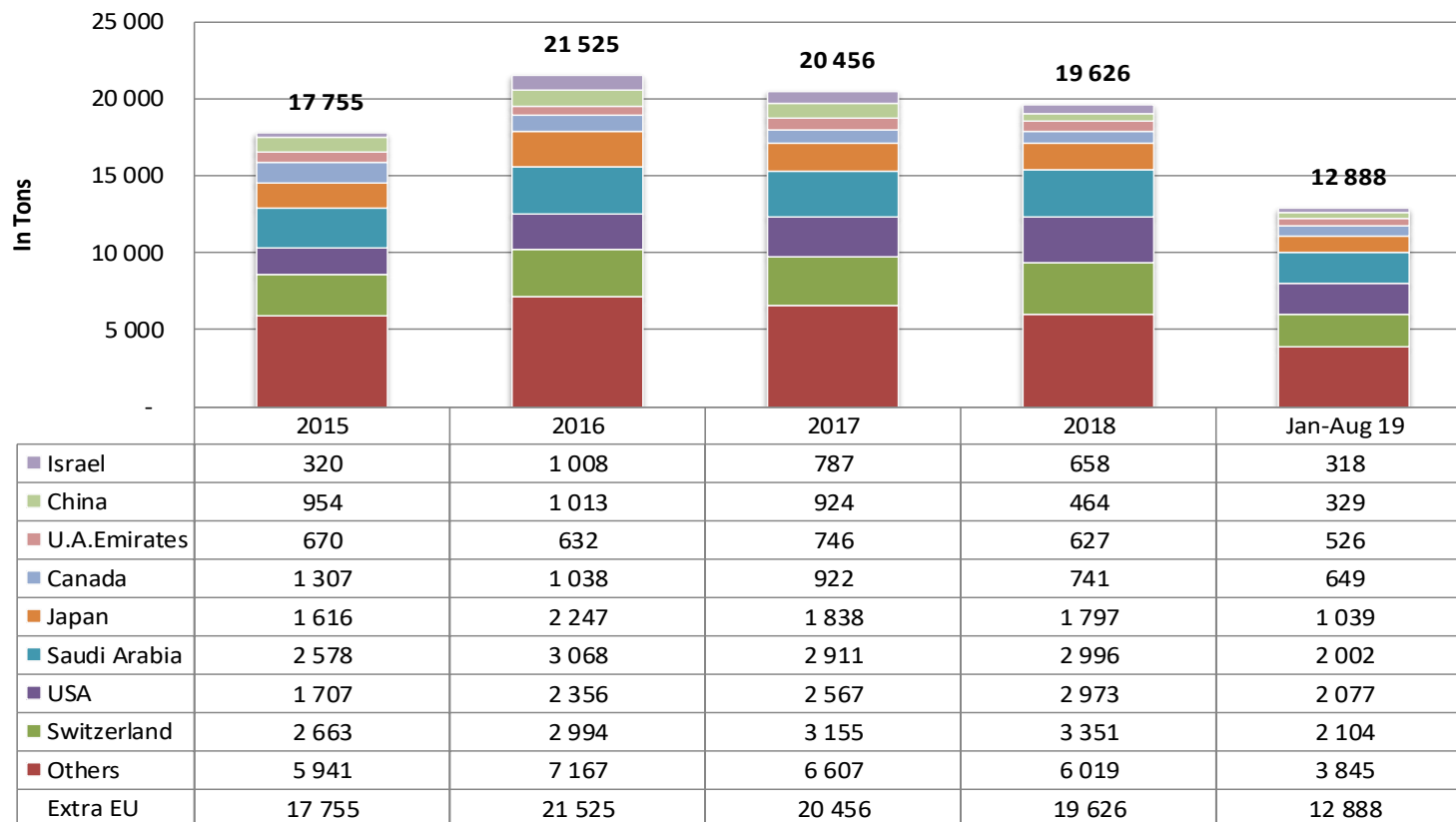
2016 2017 2018 Jan-Aug 2019

# Share of Exports of Honey in 2017



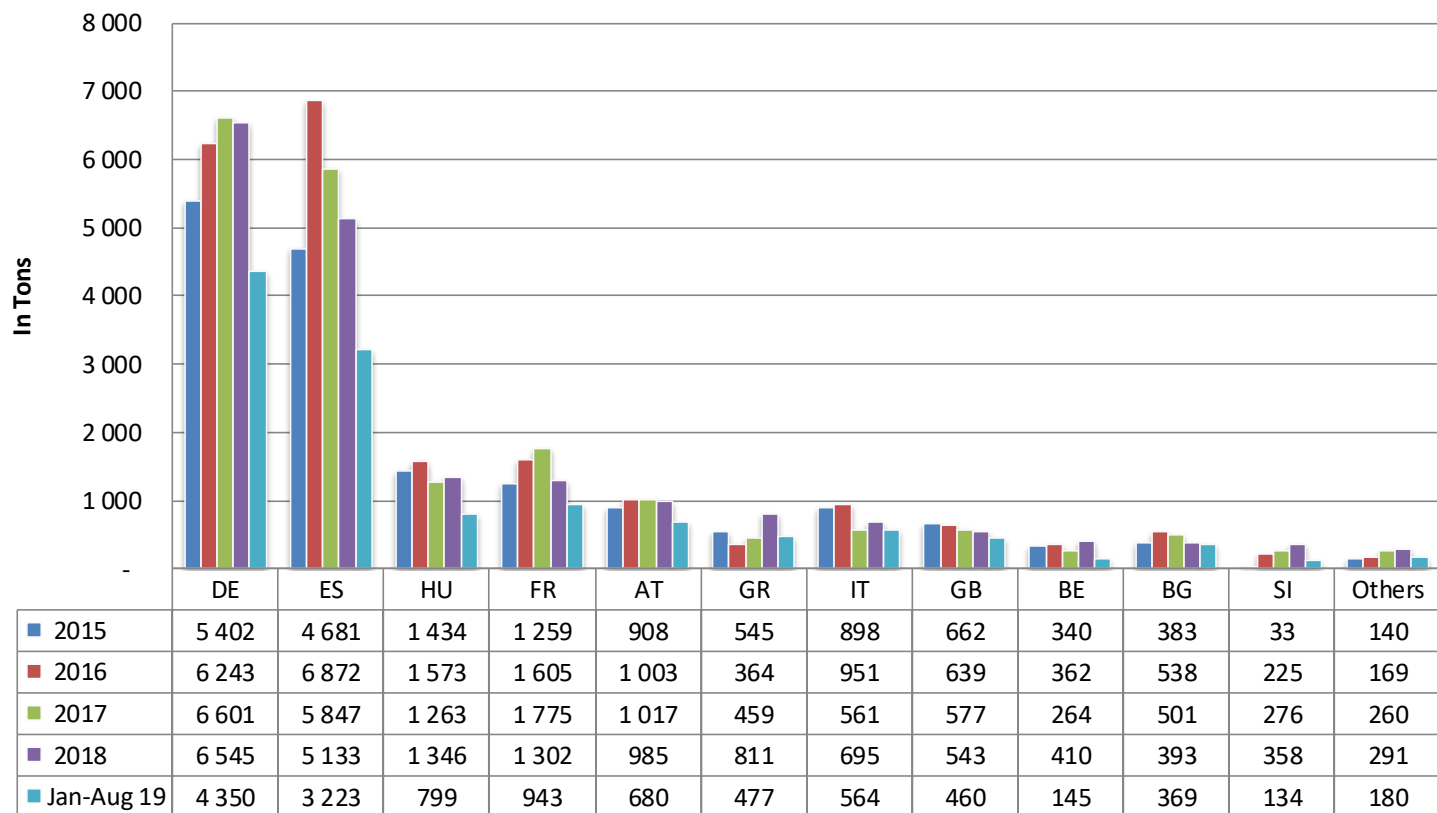
Source : UN Comtrade

# EU Exports of Honey by Destinations



Source : Eurostat Comext

## Member States Share of Export to Third Countries



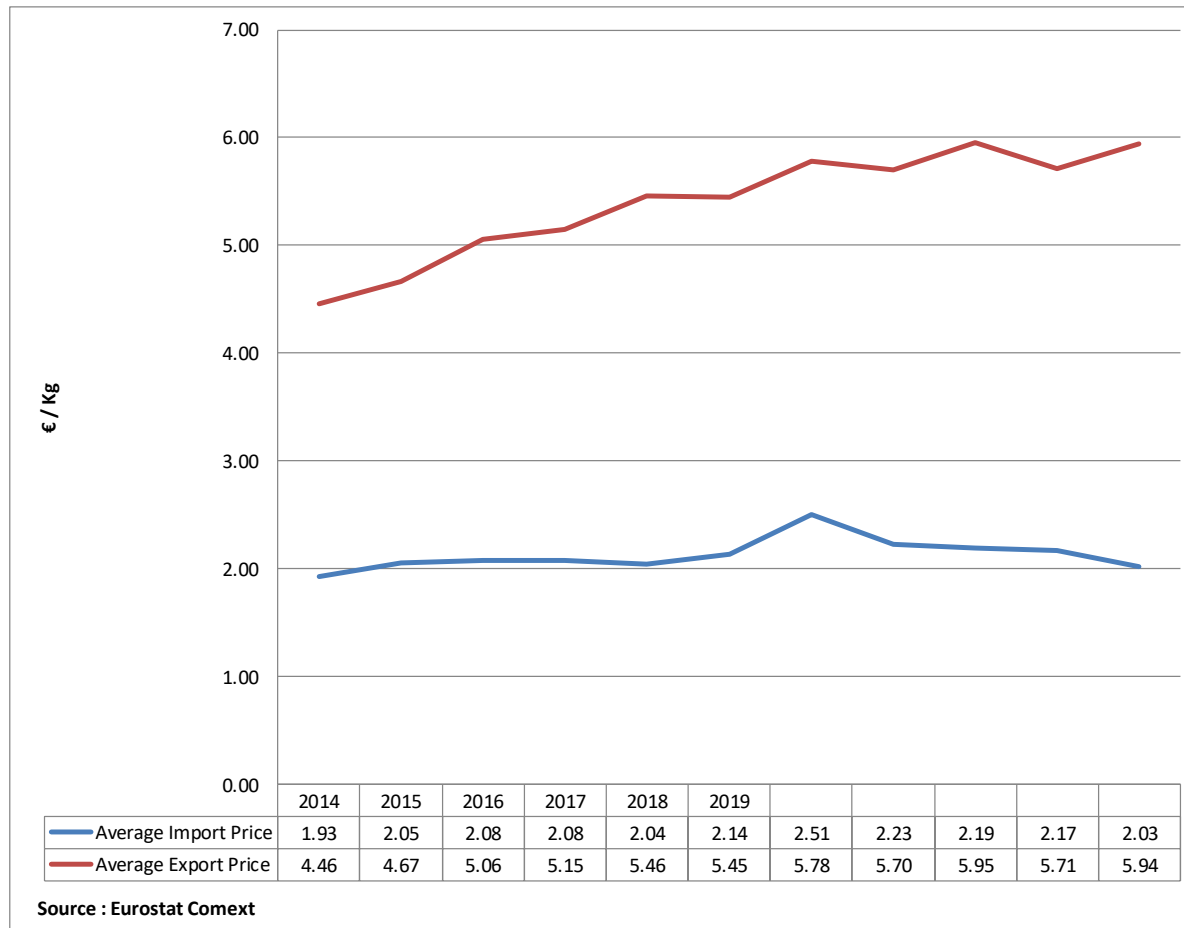
Source : Eurostat Comext

## 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%
<b>Extra EU</b>	<b>5.74</b>	<b>6.01</b>	<b>5.78</b>	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](https://ec.europa.eu/info/food-farming-fisheries/animals-and-animal-products/animal-products/honey_en)