



# Honey Market Presentation

**Civil Dialogue Group  
13 November 2018**



# 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)

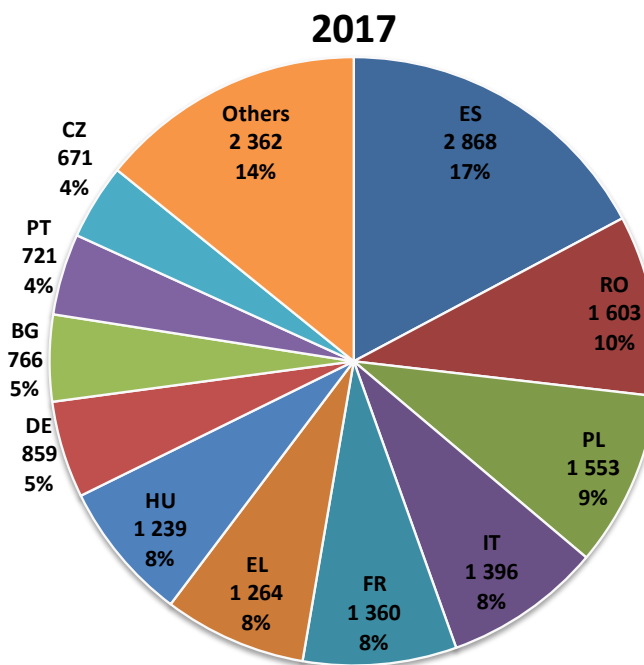
- EU is only 60% self-sufficient in honey
- Imports needed to cover EU domestic consumption
- Main supplier for imported honey: China (around 40% of EU imports)
- EU honey trade balance largely negative: Imports > Exports



# Number of hives (in thousand)



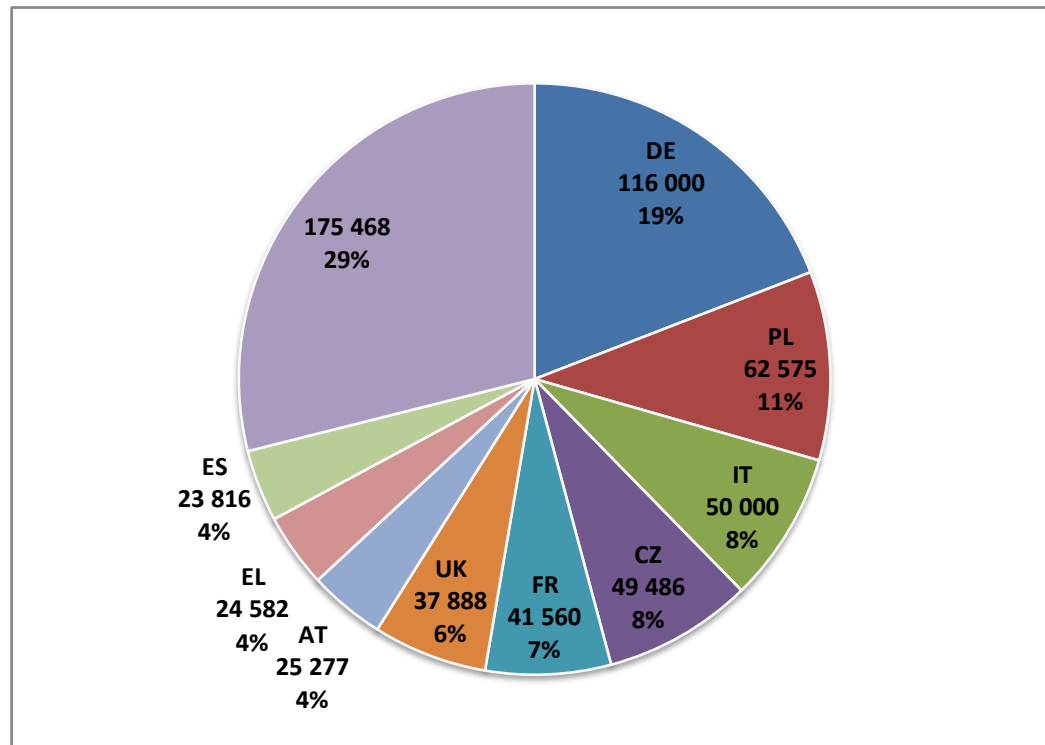
	2016	2017		
ES	2 834	2 868	↑	+1.2%
RO	2 472	1 603	↓	-35.2%
PL	1 505	1 553	↑	+3.2%
IT	1 356	1 396	↑	+3.0%
FR	1 322	1 360	↑	+2.8%
EL	1 248	1 264	↑	+1.3%
HU	1 184	1 239	↑	+4.6%
DE	807	859	↑	+6.4%
BG	754	766	↑	+1.5%
PT	700	721	↑	+3.1%
CZ	671	671	↓	-0.1%
HR	406	371	↓	-8.5%
AT	354	329	↓	-7.0%
SK	292	279	↓	-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%
EU	17 189	16 663	↓	-3.1%



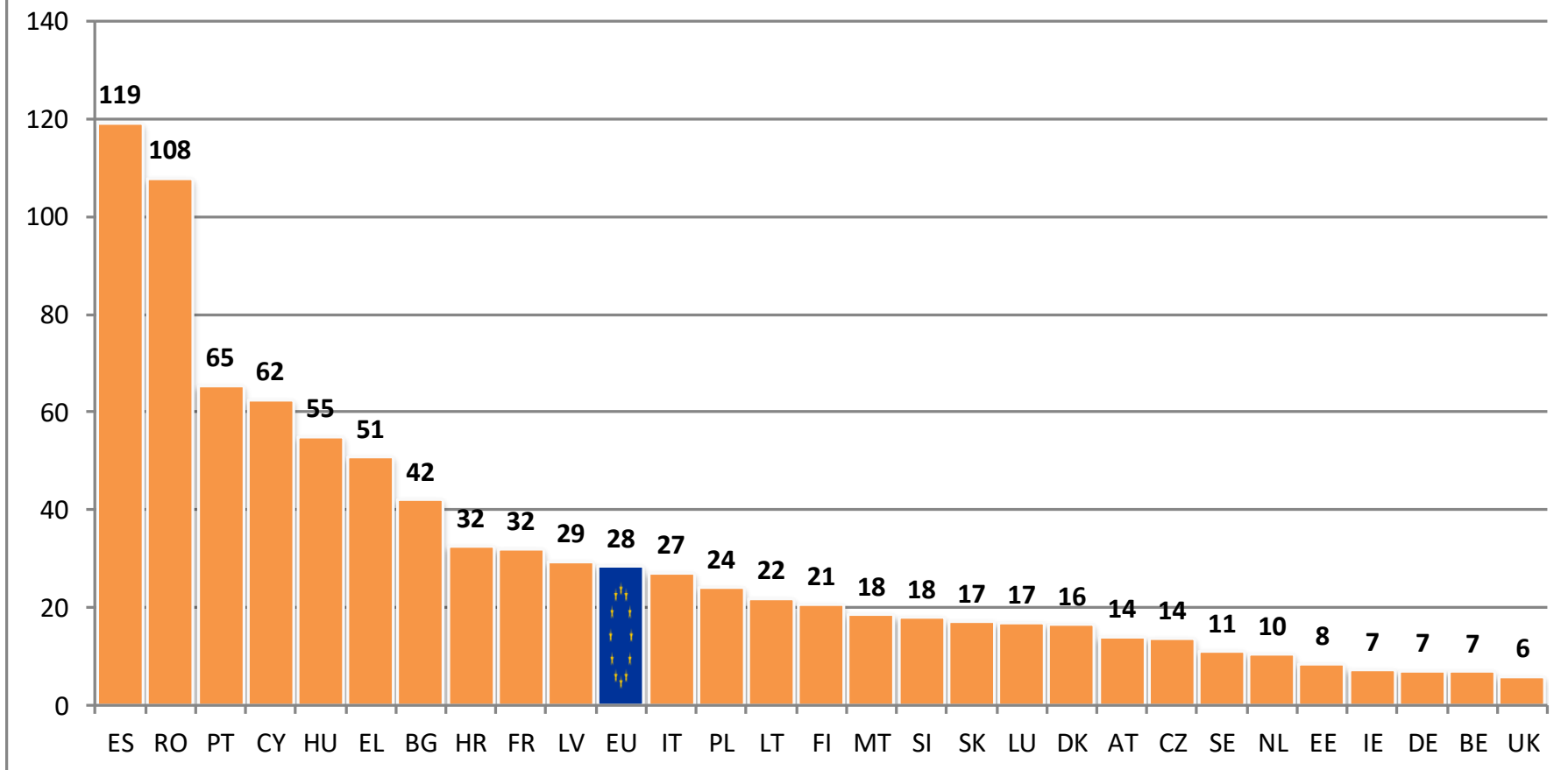
# Number of beekeepers



	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%

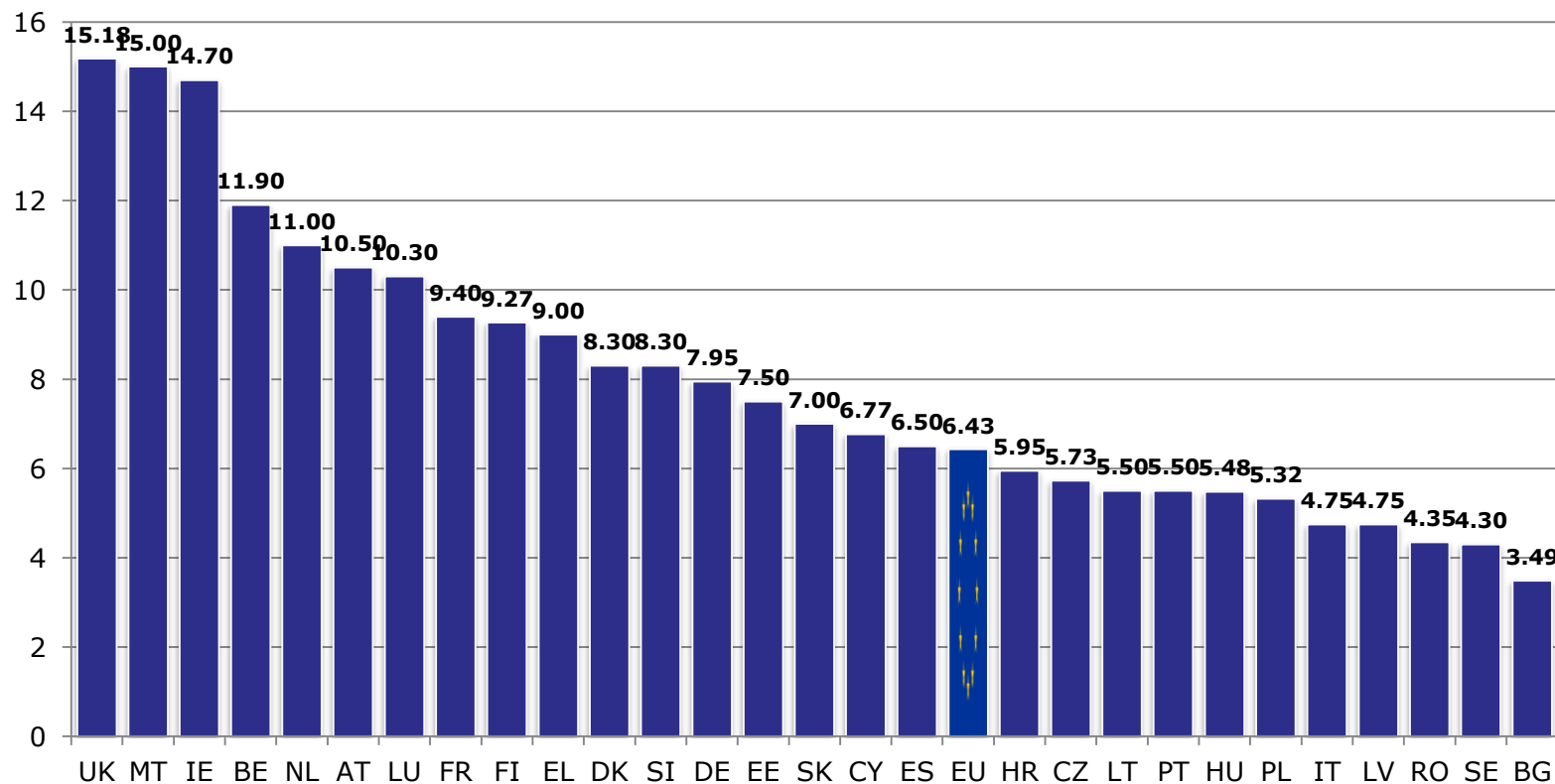


## Average Number of hives per Beekeeper (2016)

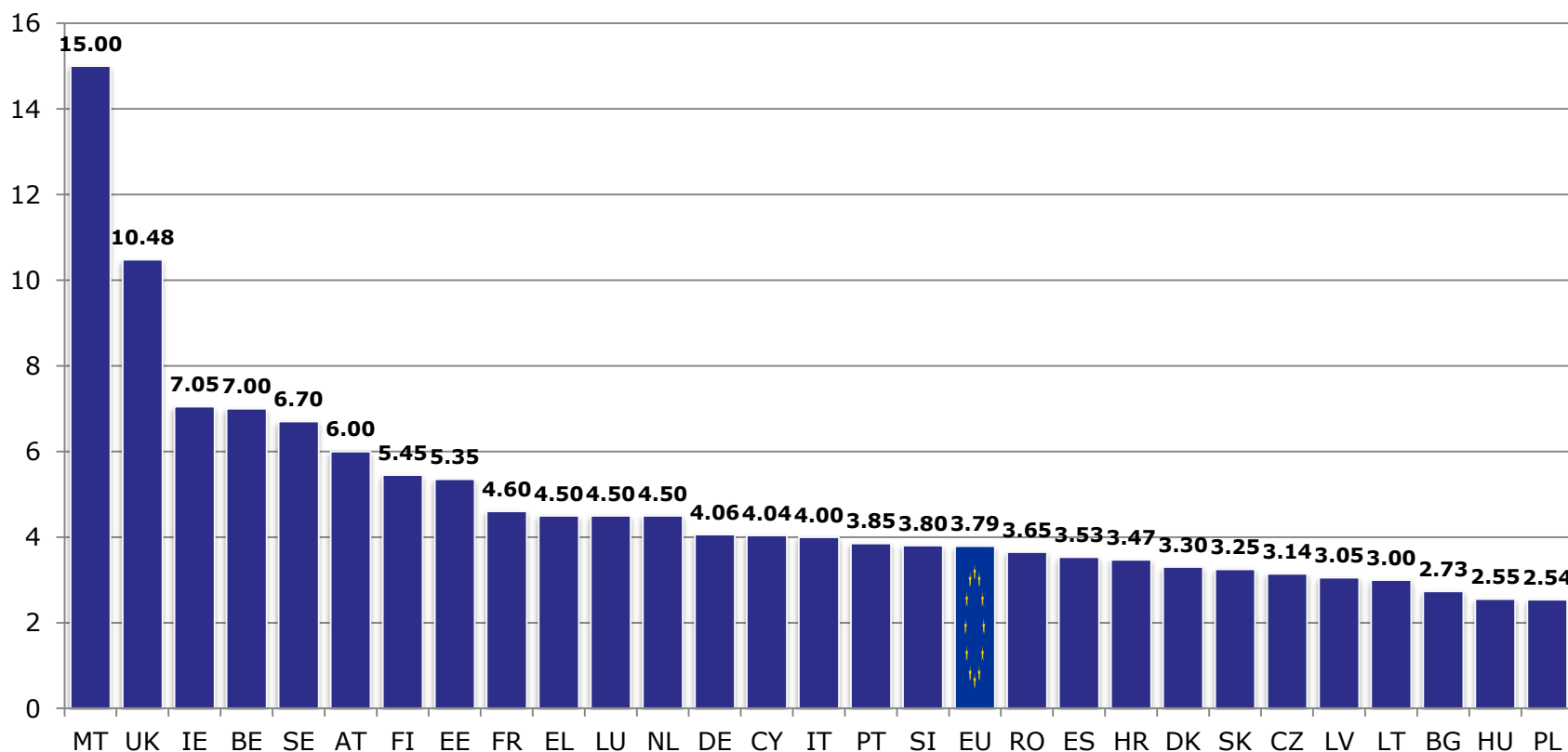




## Price for multi-floral honey at the site of production in Euro/Kg (2014, MS NAP)

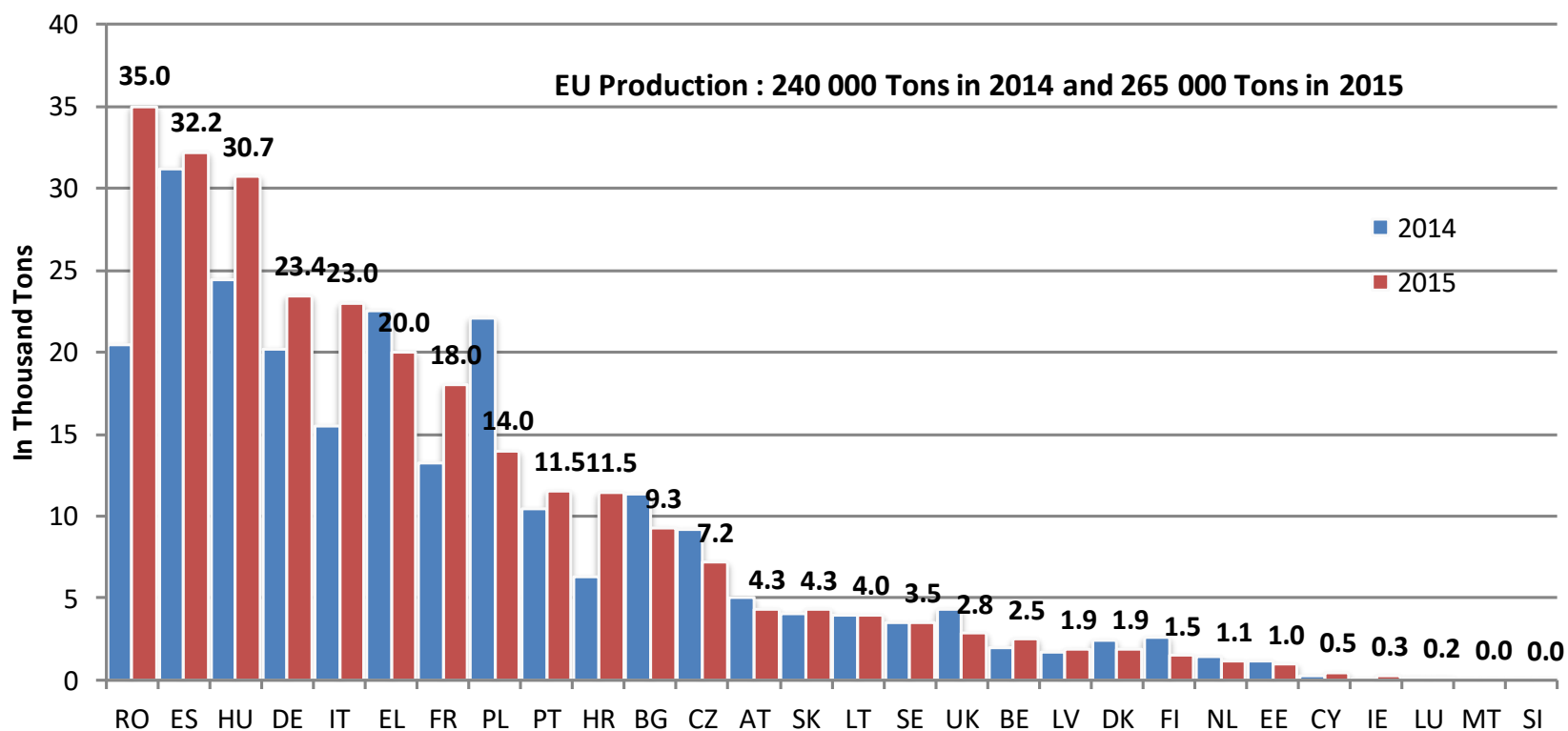


## Price for multi-floral honey in bulk at wholesalers in Euro/Kg (2014, MS NAP)





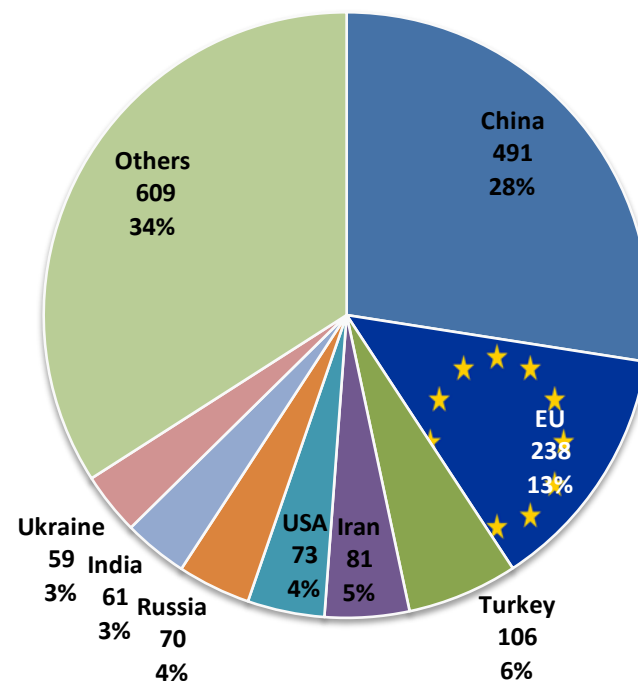
# EU Honey Production



# 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%
	1 632	1 826	1 787	

Source : FAO

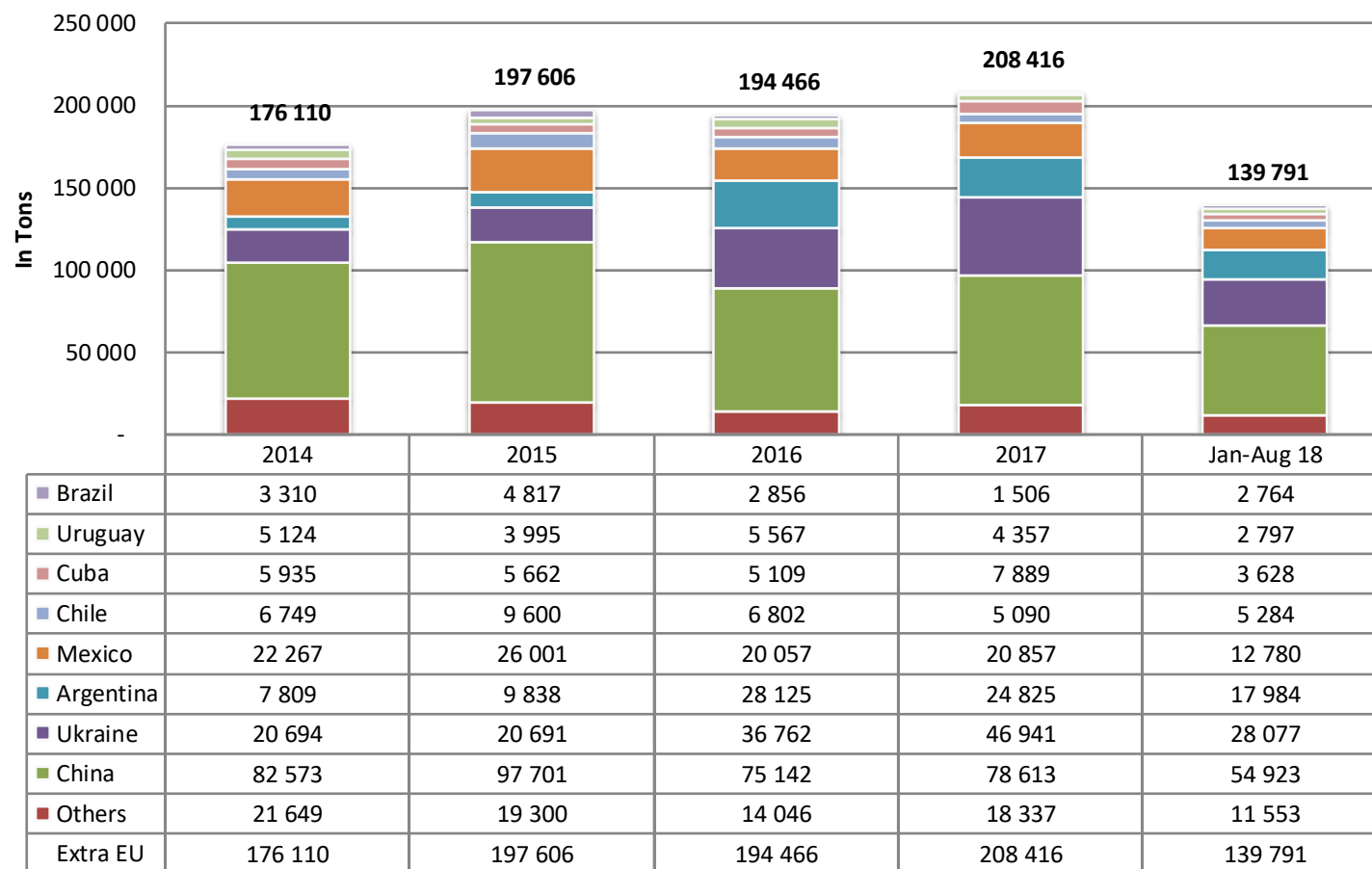


# World Imports of Honey

	2016		2017		Share of World Imports	
	Tons	1 000 €	Tons	1 000 €	Tons	1 000 €
<b>Africa</b>	9 546	19 941	7 865	13 113	1.6%	0.9%
<b>Asia</b>	78 555	316 963	65 429	303 271	13.4%	21.3%
<i>of which USA</i>	166 477	381 698	175 866	503 442	36.0%	35.4%
<b>Central America and Carribeans</b>	895	2 443	525	1 361	0.1%	0.1%
<i>of which Japan</i>	48 445	142 477	42 821	126 573	8.8%	8.9%
<i>China</i>	6 032	65 739	5 682	80 896	1.2%	5.7%
<b>European Union</b>	194 466	433 103	208 416	456 925	42.7%	32.2%
<b>Near and Middle Eastern Countries</b>	28 373	99 375	7 540	27 507	1.5%	1.9%
<b>North America</b>	173 136	408 214	177 689	532 014	36.4%	37.4%
<b>Oceania and Polar Regions</b>	10 054	41 737	8 713	41 777	1.8%	2.9%
<b>Other European Countries</b>	10 327	41 254	10 939	42 828	2.2%	3.0%
<b>South America</b>	490	1 088	844	2 205	0.2%	0.2%
<b>Total</b>	<b>505 842</b>	<b>1 364 117</b>	<b>487 959</b>	<b>1 421 002</b>		

Source : UN Comtrade

# EU Imports of Honey by Origin (in Tons)

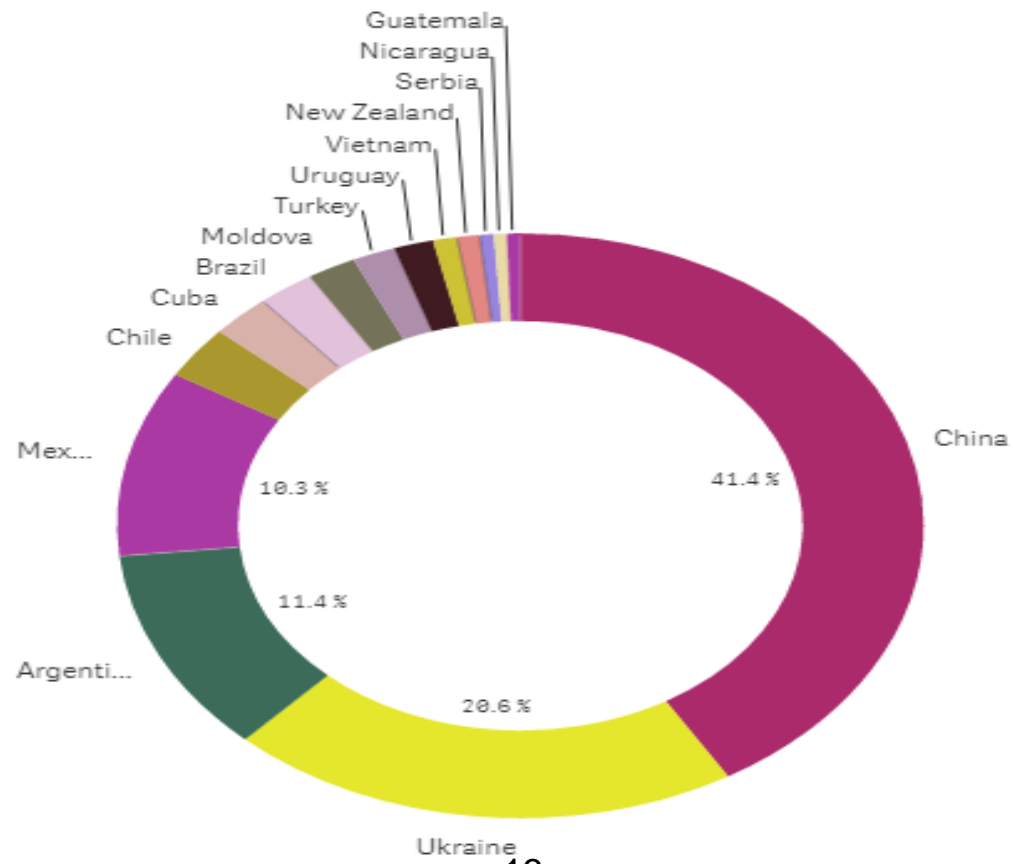


Source : Eurostat Comext

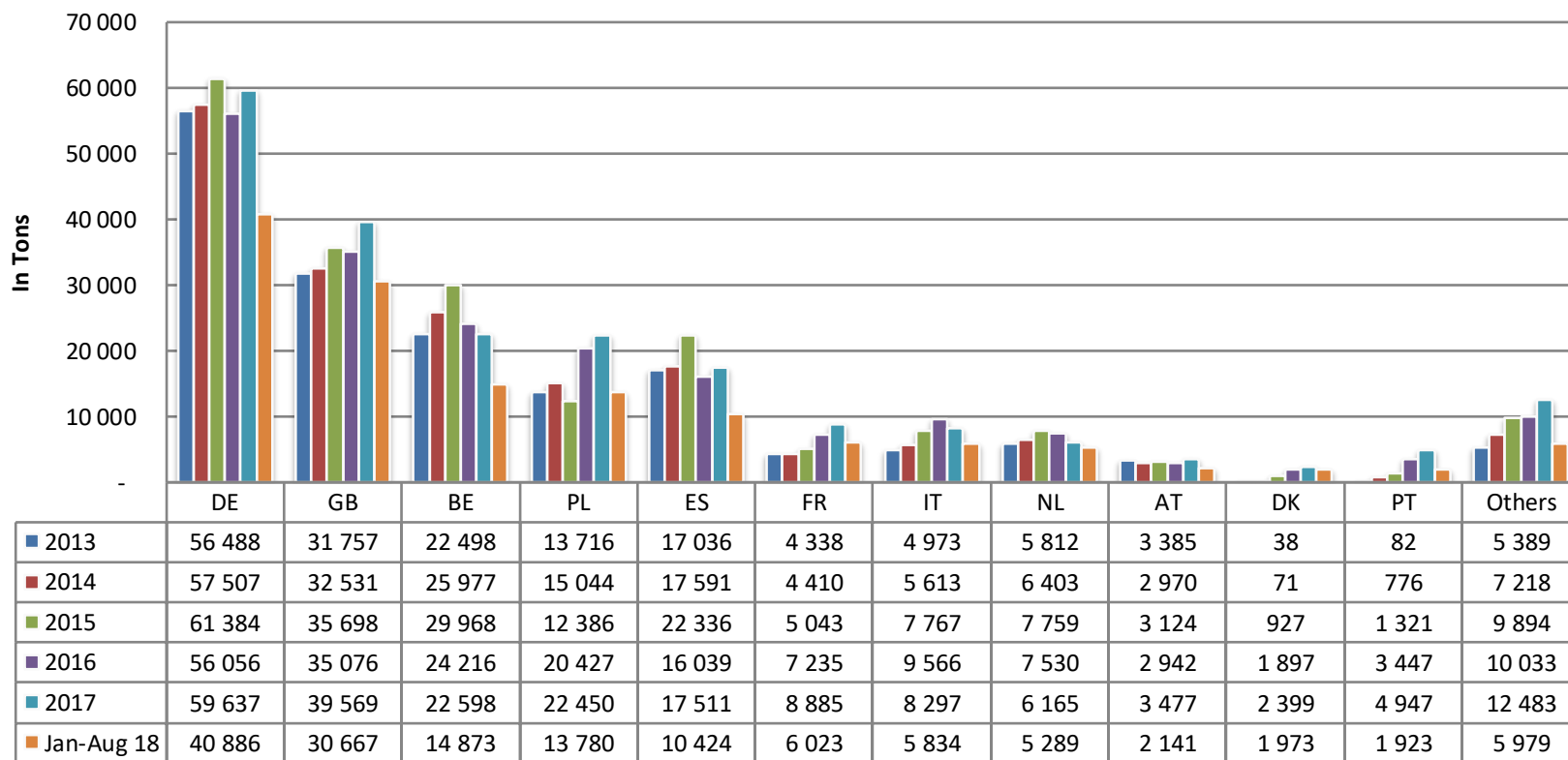


European  
Commission

Third Country



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



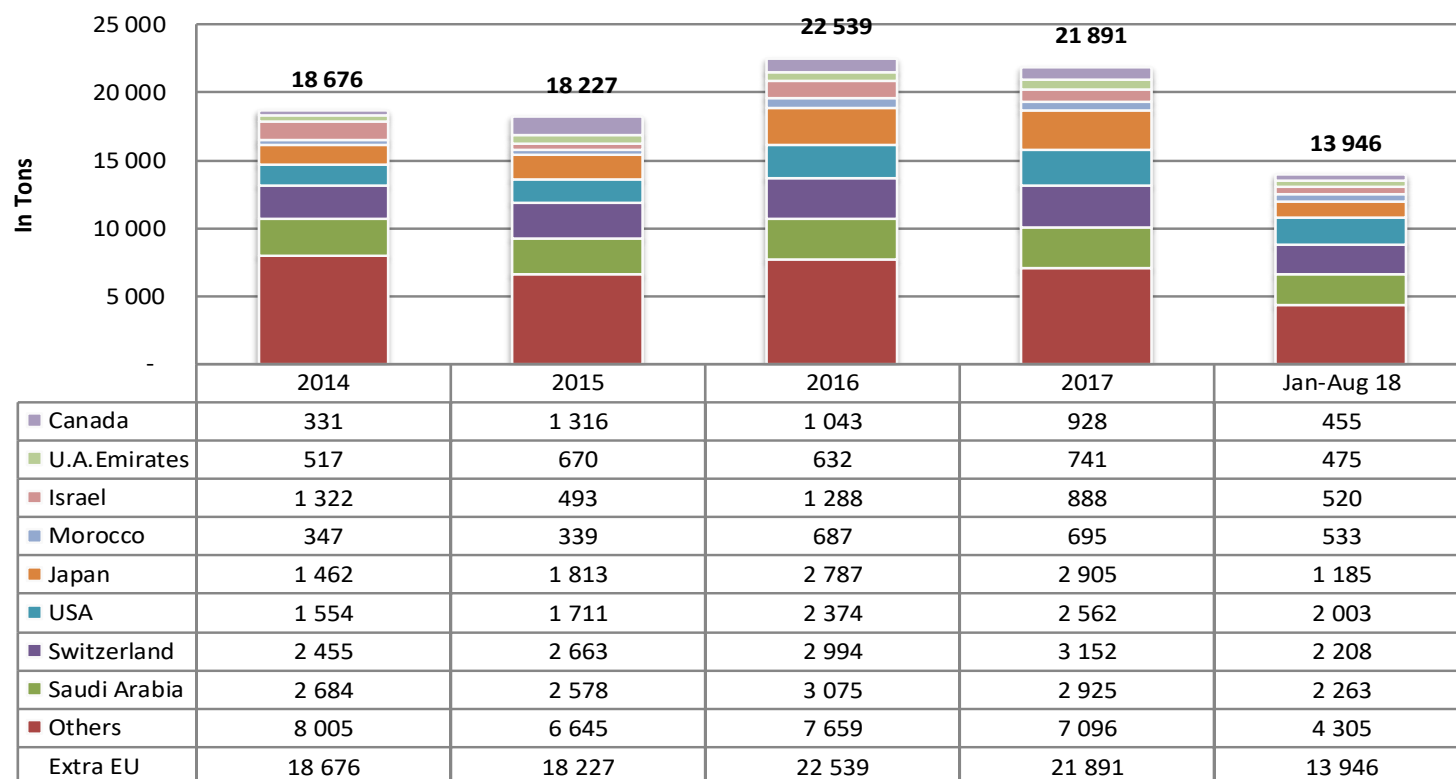
Source : Eurostat Comext

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

	2015	2016	2017	2018	
China	1.64	1.58	1.47	1.30	↓ -11.2%
Ukraine	2.16	1.76	1.74	1.88	↑ +8.0%
Argentina	3.24	2.12	2.23	2.36	↑ +6.2%
Mexico	3.24	2.96	2.80	2.83	↑ +1.2%
Cuba	2.82	2.42	2.34	2.46	↑ +5.3%
Chile	3.72	2.77	2.90	2.92	↑ +0.8%
Moldova	3.04	2.59	2.49	2.68	↑ +7.8%
Uruguay	3.15	2.15	2.36	2.37	↑ +0.4%
Turkey	3.98	4.01	3.75	3.99	↑ +6.4%
New Zealand	16.14	24.10	23.36	22.32	↓ -4.5%
Vietnam	2.34	1.62	1.66	1.44	↓ -13.3%
Serbia	4.17	3.71	3.06	3.82	↑ +24.8%
Brazil	3.42	3.25	3.84	3.43	↓ -10.7%
El Salvador	3.53	2.23	2.21	2.67	↑ +21.1%
Guatemala	3.55	2.57	2.60	2.81	↑ +8.0%
Extra EU	2.52	2.23	2.19	2.15	↓ -1.9%



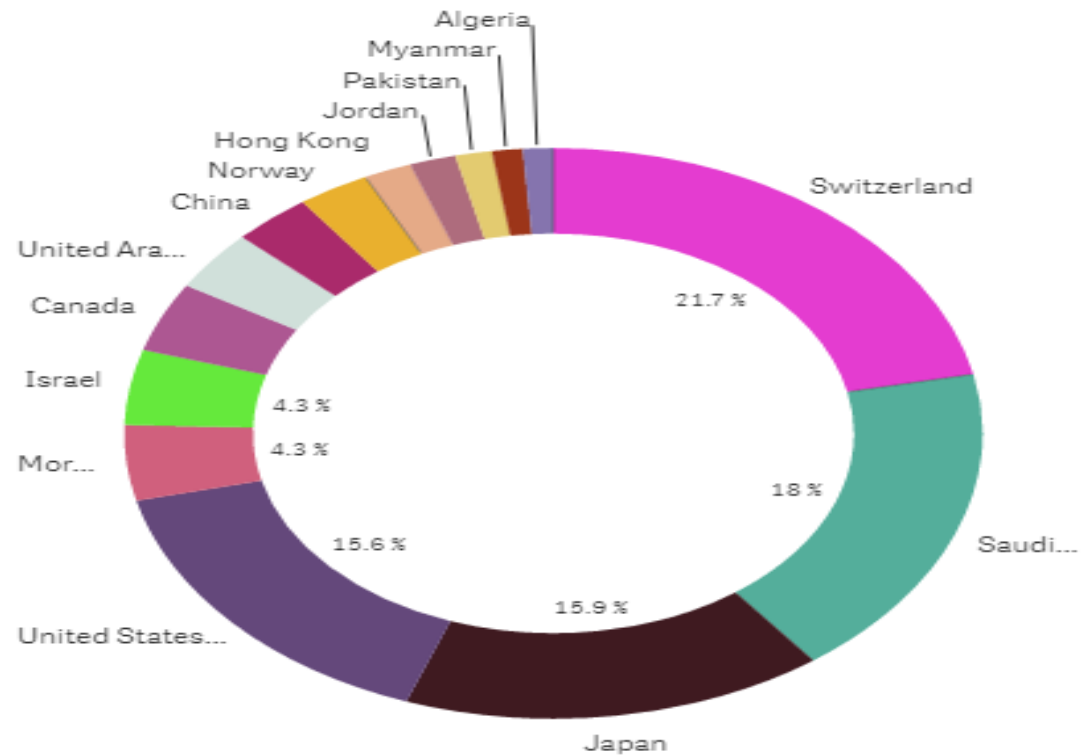
# EU Exports of Honey by Destinations



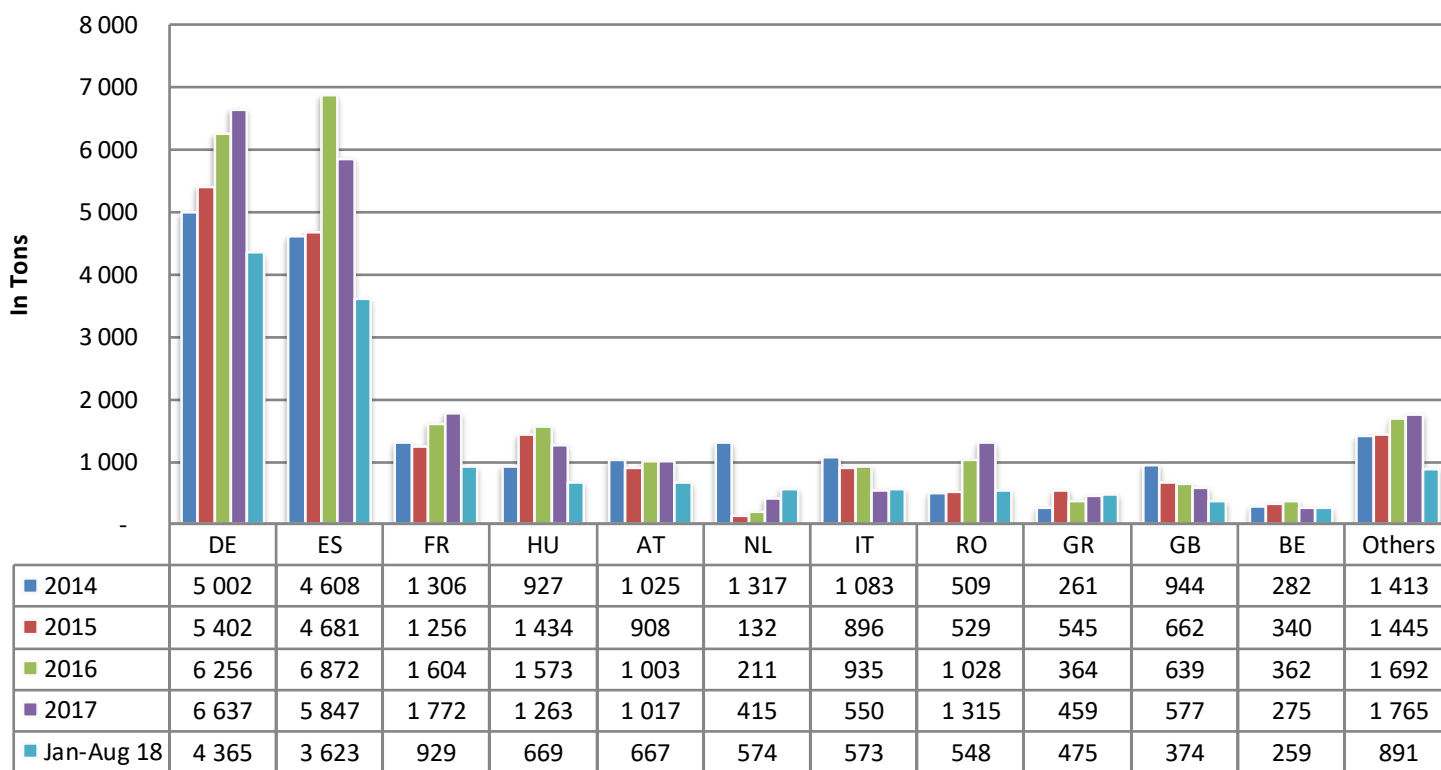
Source : Eurostat Comext



European  
Third Country



## Member States Share of Export to Third Countries



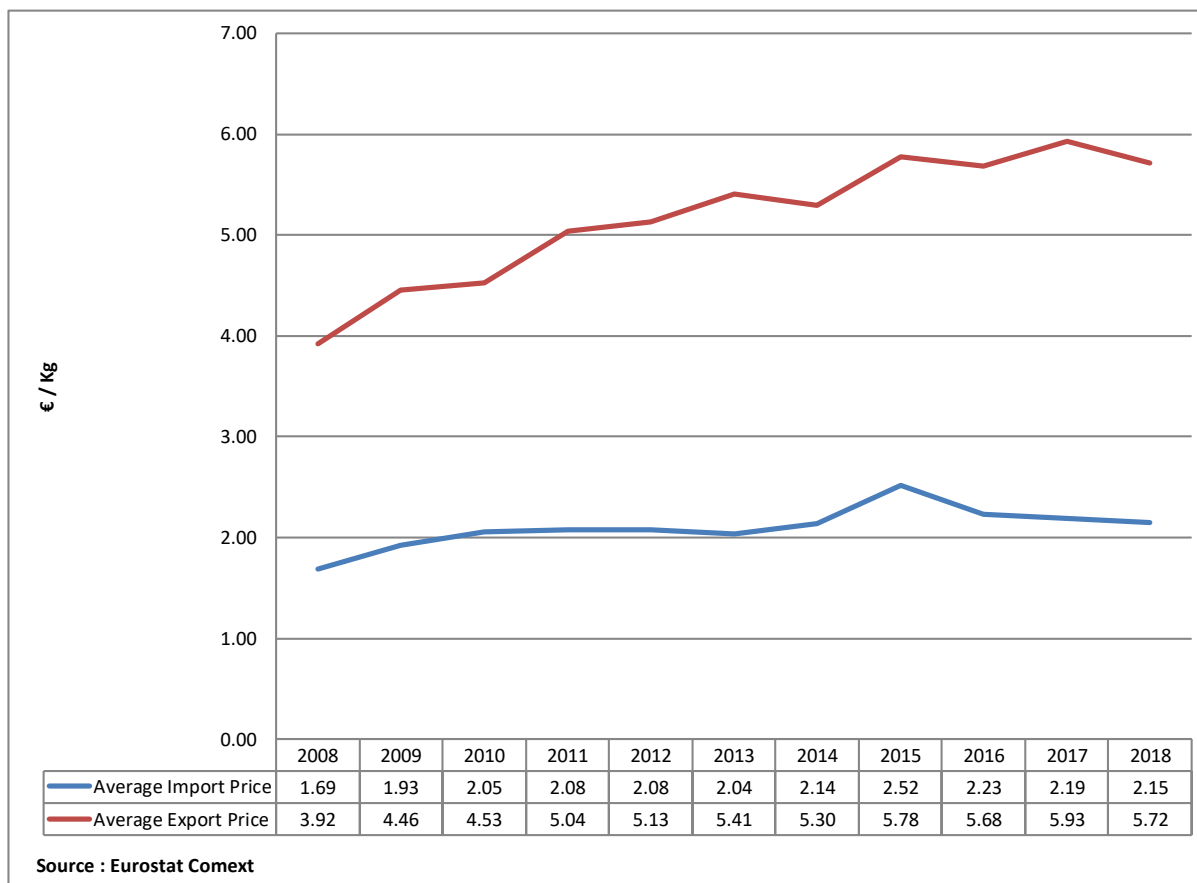
Source : Eurostat Comext

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

	2015	2016	2017	2018		
Switzerland	5.47	5.52	5.56	5.39	↓	-3.0%
Saudi Arabia	6.97	7.61	7.84	7.15	↓	-8.7%
Japan	5.93	5.58	5.49	5.70	↑	+3.9%
USA	6.38	7.08	7.38	6.82	↓	-7.6%
China	6.62	5.53	5.80	5.77	↓	-0.5%
Canada	3.56	3.79	3.75	4.15	↑	+10.6%
Israel	3.01	2.93	2.93	2.96	↑	+1.1%
U.A. Emirates	8.30	8.44	8.36	7.97	↓	-4.7%
Morocco	2.83	2.13	1.98	1.87	↓	-5.7%
Hong Kong	6.77	6.52	6.51	7.20	↑	+10.6%
Algeria	5.54	4.66	5.46	3.25	↓	-40.5%
Jordan	6.48	5.11	4.86	5.24	↑	+7.9%
Iraq	6.45	5.96	5.48	5.95	↑	+8.7%
Pakistan	6.77	7.10	6.12	5.99	↓	-2.2%
Ceuta	3.08	2.58	3.35	3.86	↑	+15.2%
<b>Extra EU</b>	<b>5.78</b>	<b>5.68</b>	<b>5.93</b>	5.72	↓	-3.6%

Source : Eurostat Comext

# Average Import and Export Prices



## Where to find data:

- [http://ec.europa.eu/agriculture/markets/index\\_en.htm](http://ec.europa.eu/agriculture/markets/index_en.htm)
- **Click on link: Honey**