



# Honey Market Presentation

***CDG 17 May 2019***



# Overview of EU honey market (1)

- EU second world producer (230 000 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)

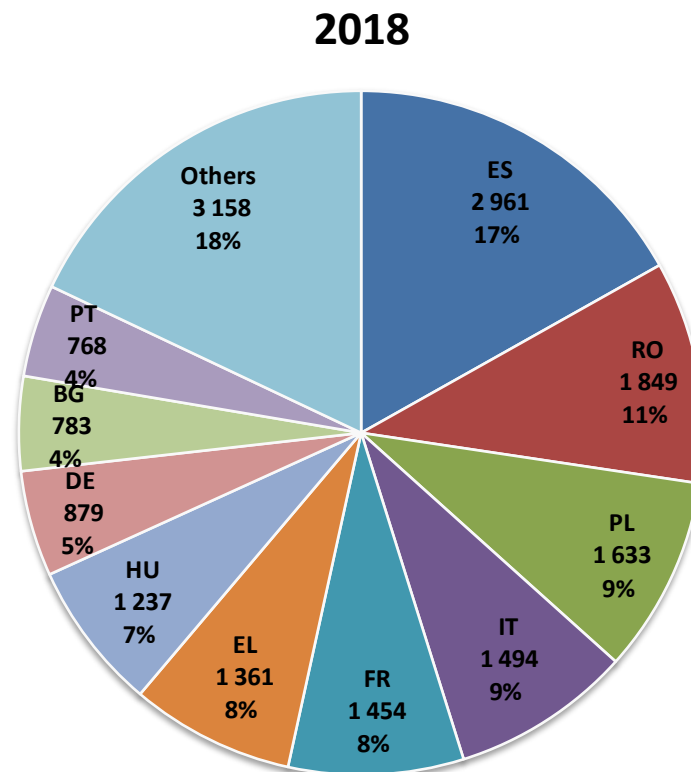
- EU is only 60% self-sufficient in honey
- Imports needed to cover EU domestic consumption
- Main supplier for imported honey: China (around 40% of EU imports), and Ukraine (20% of EU imports)
- EU honey trade balance largely negative: Imports > Exports



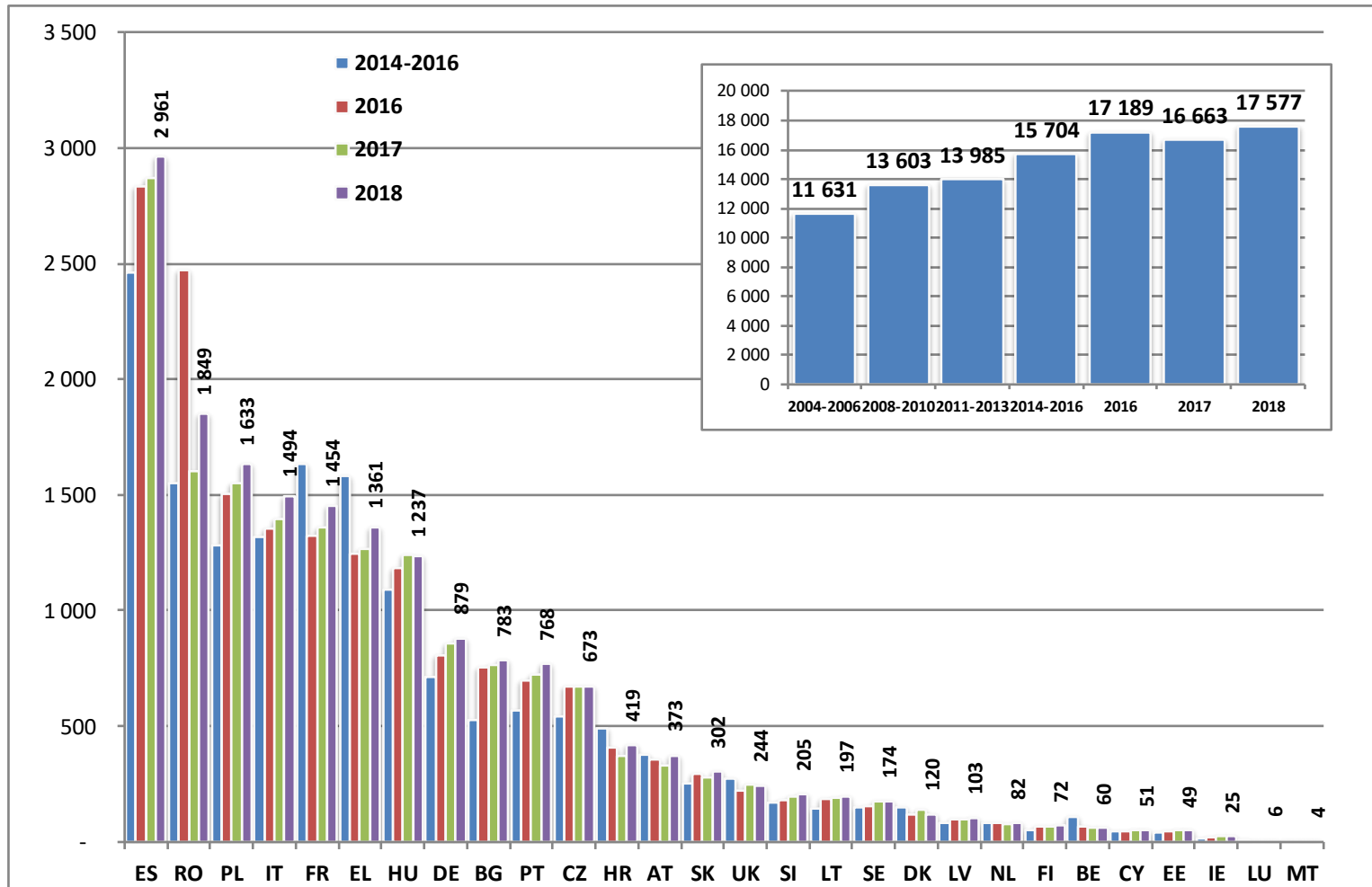
# Number of hives (in thousand)



	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%



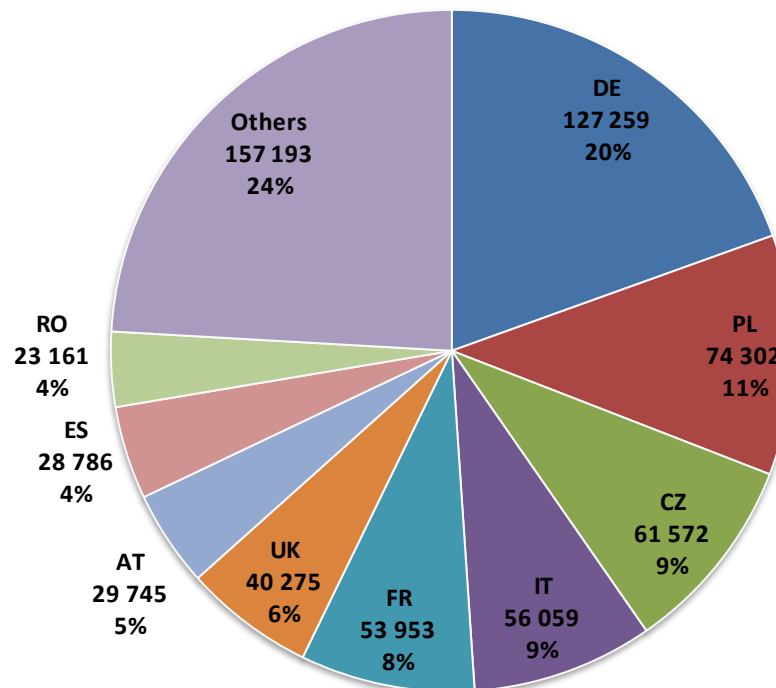
# Number of hives (in thousand)



# 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%

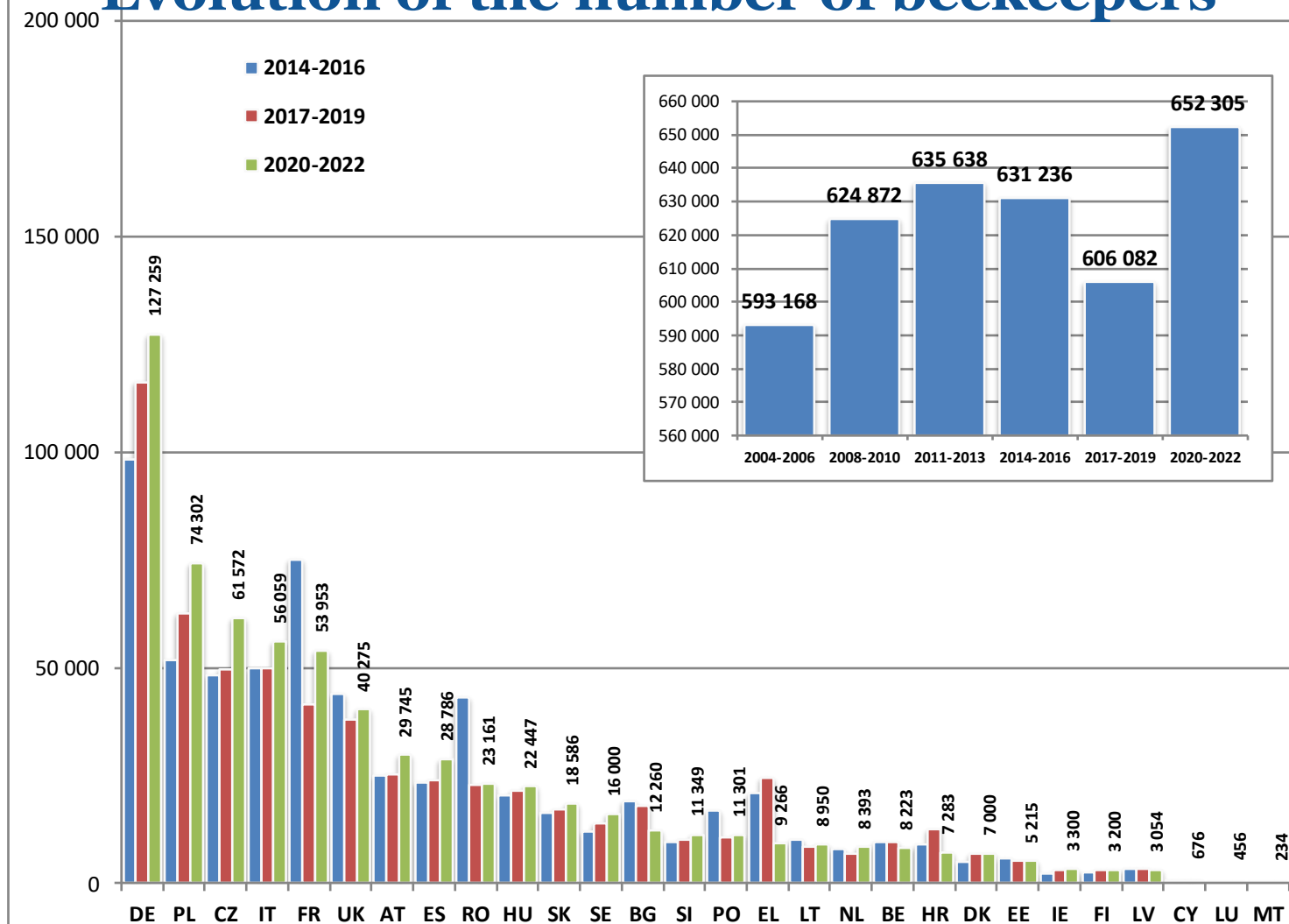




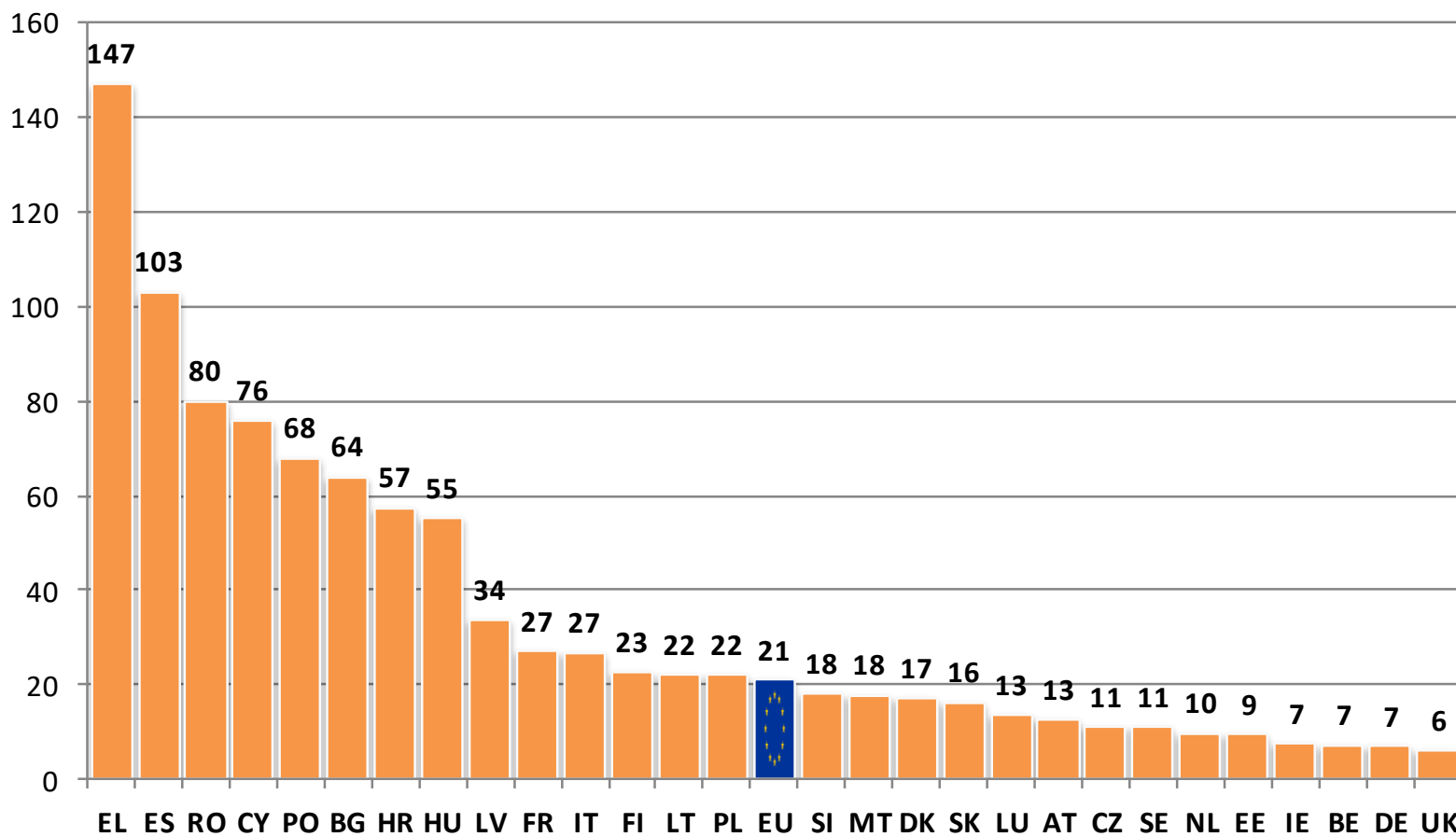
# Number of beekeepers



## Evolution of the number of beekeepers

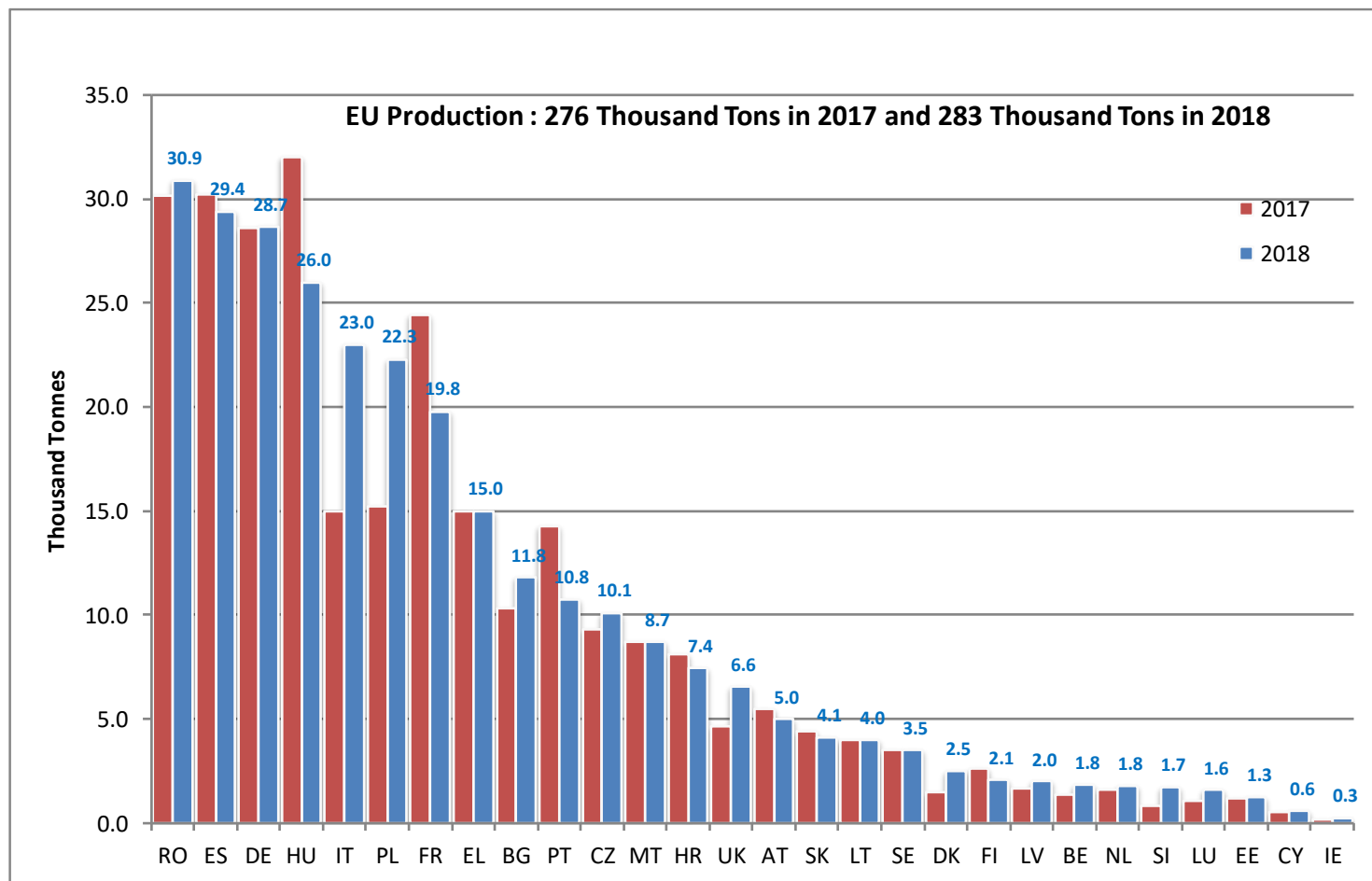


## Average Number of Hives per Beekeeper (2018)

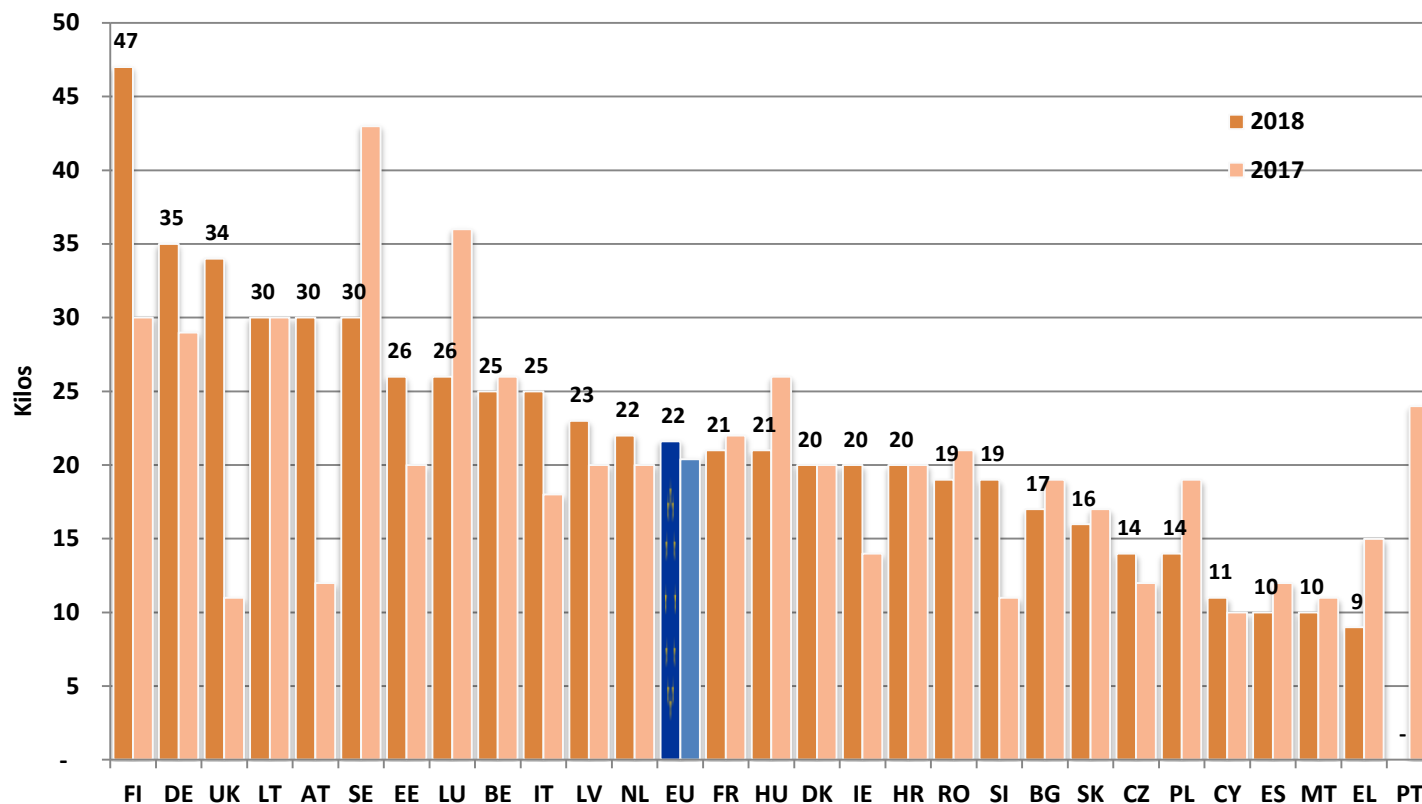




# EU Honey Production



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

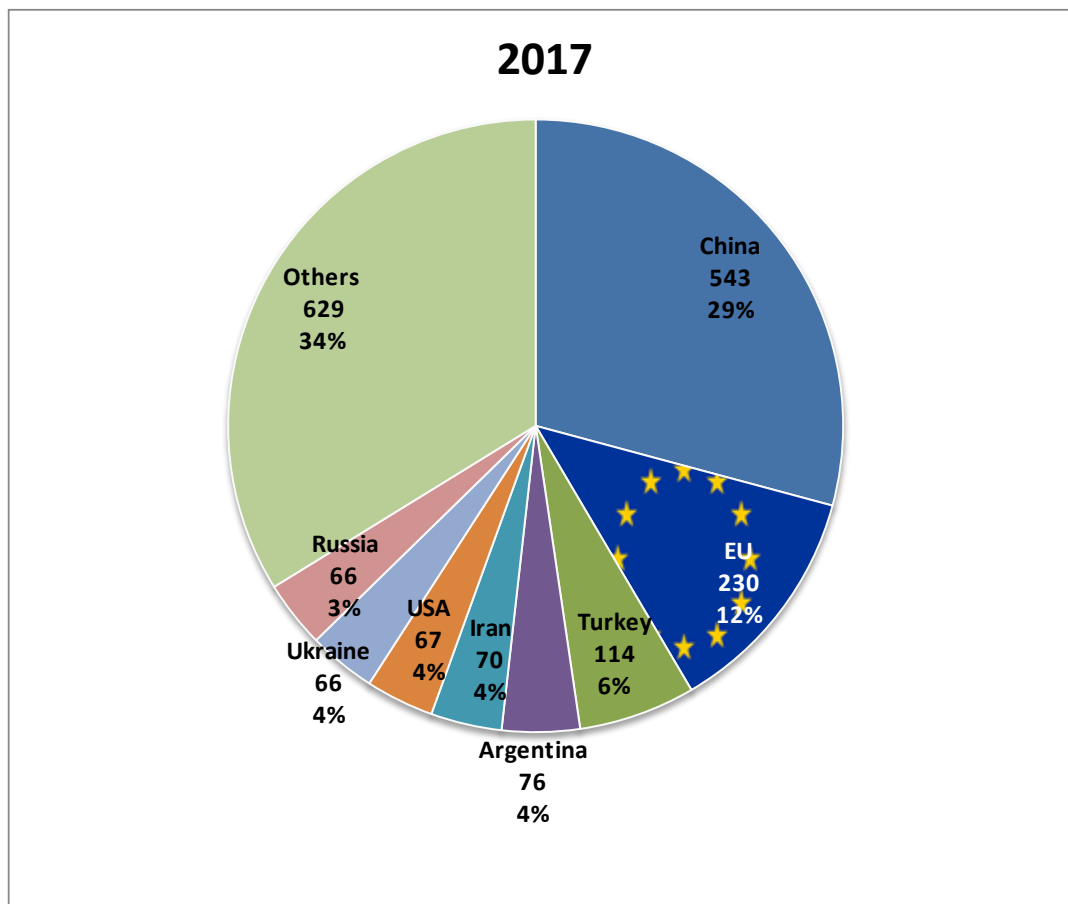


source: MS NAP

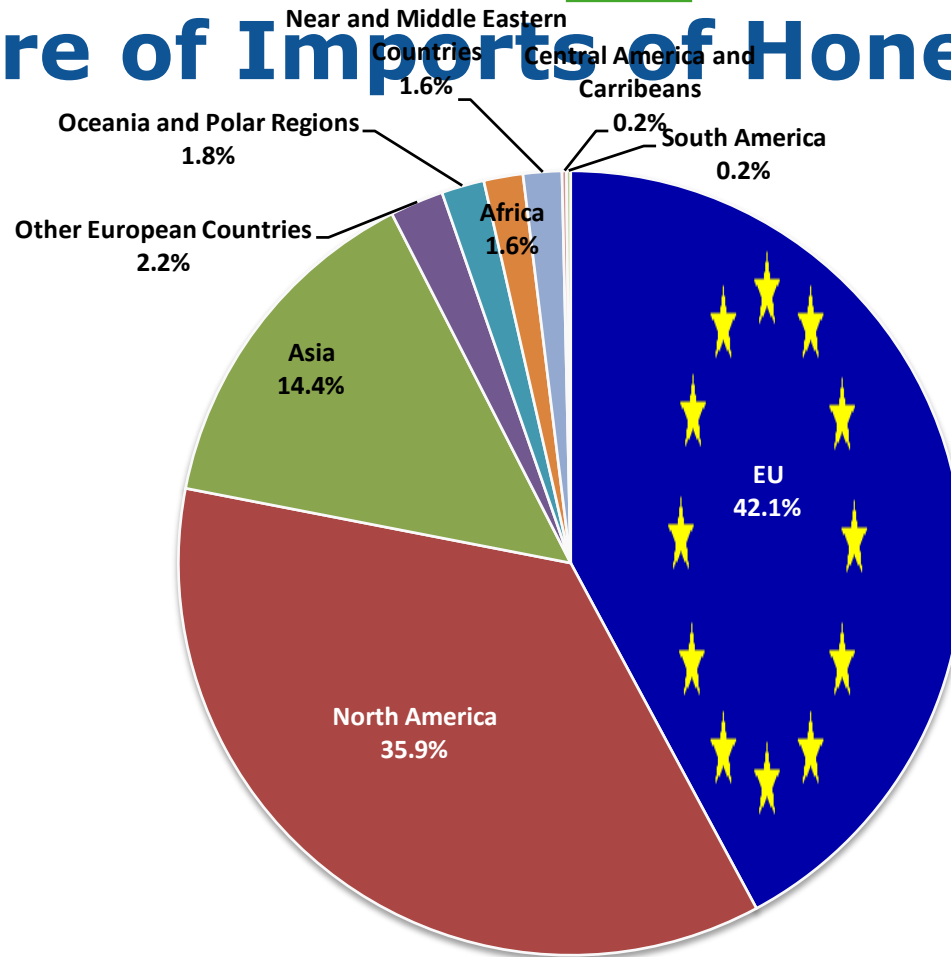
# World Production of Honey per Country (1 000 T)

	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%
Tanzania	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%
Republic	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



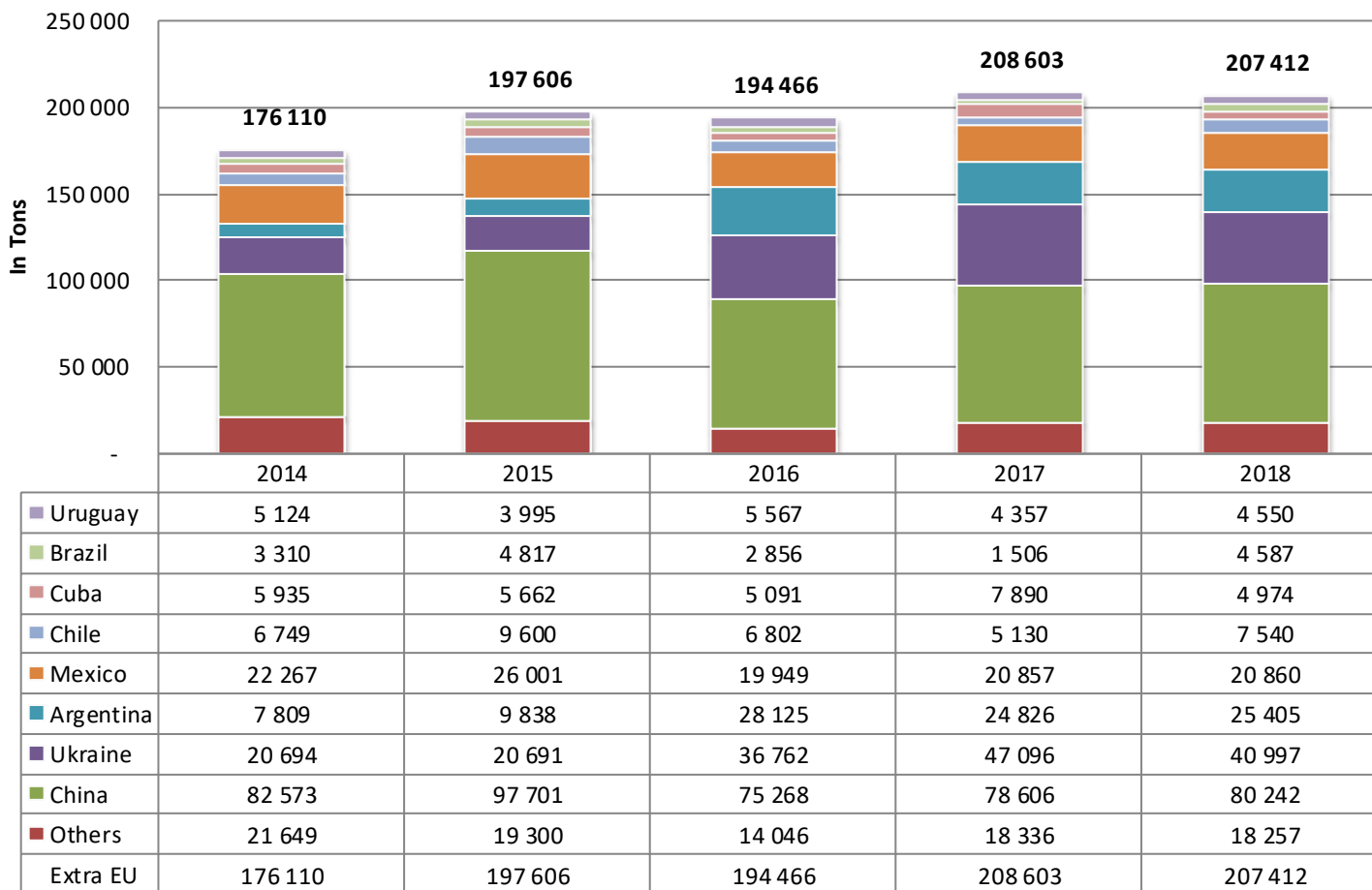
Source : UN Comtrade

# World Imports of Honey

	2016		2017		Share of World Imports	
	Tons	1 000 €	Tons	1 000 €	Tons	1 000 €
<b>European Union</b>	194 466	433 103	208 603	457 163	42.1%	31.8%
<b>North America</b>	173 136	408 214	177 689	532 014	35.9%	37.0%
<i>of which USA</i>	166 477	381 698	175 866	503 442	35.5%	35.0%
<b>Asia</b>	78 875	317 970	71 367	315 992	14.4%	22.0%
<i>of which Japan</i>	48 445	142 477	42 821	126 573	8.7%	8.8%
<i>China</i>	6 032	65 739	5 682	80 896	1.1%	5.6%
<b>Other European Countries</b>	10 327	41 254	10 939	42 828	2.2%	3.0%
<b>Oceania and Polar Regions</b>	10 054	41 737	8 713	41 777	1.8%	2.9%
<b>Africa</b>	9 546	19 941	7 992	13 412	1.6%	0.9%
<b>Near and Middle Eastern Countries</b>	16 174	102 337	7 875	29 728	1.6%	2.1%
<b>Central America and Carribeans</b>	895	2 443	905	2 348	0.2%	0.2%
<b>South America</b>	490	1 088	844	2 205	0.2%	0.2%
<b>Total</b>	<b>493 964</b>	<b>1 368 087</b>	<b>494 924</b>	<b>1 437 467</b>		

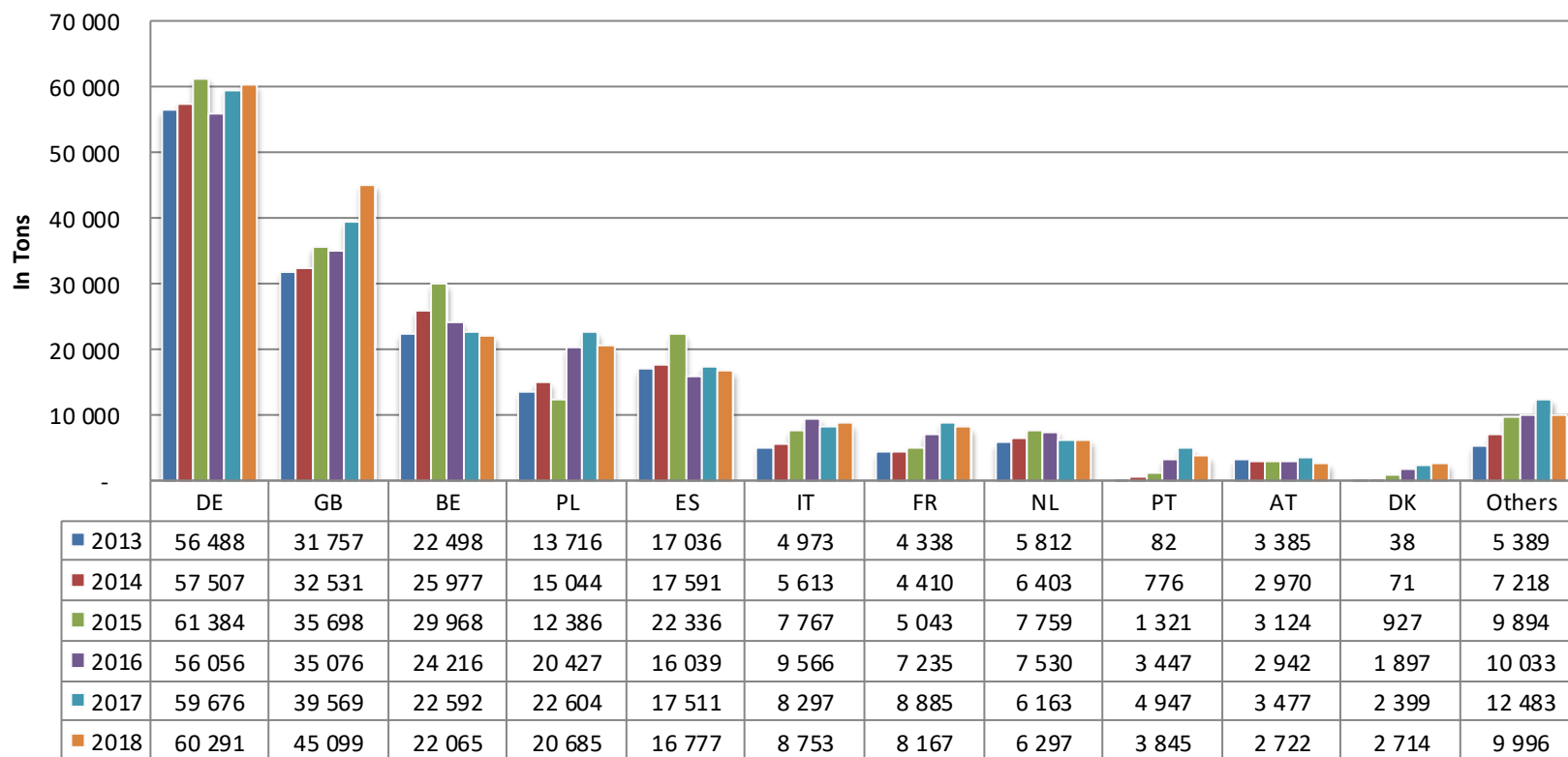
Source : UN Comtrade

# EU Imports of Honey by Origin (in Tons)



Source : Eurostat Comext

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



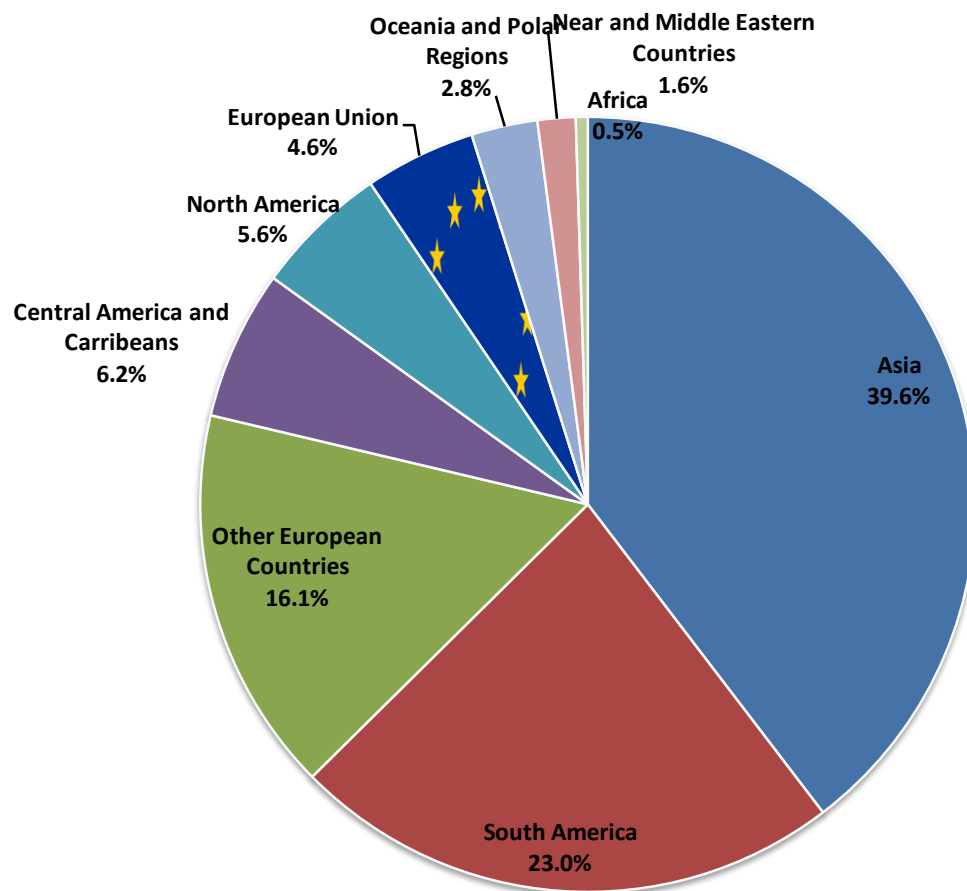
Source : Eurostat Comext



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

	2015	2016	2017	2018		
China	1.64	1.58	1.47	1.30	↓	-11.5%
Ukraine	2.16	1.76	1.74	1.83	↑	+5.5%
Argentina	3.24	2.12	2.23	2.34	↑	+5.2%
Mexico	3.24	2.96	2.80	2.82	↑	+0.8%
Cuba	2.82	2.42	2.34	2.40	↑	+2.8%
Chile	3.72	2.77	2.89	2.96	↑	+2.1%
Moldova	3.04	2.59	2.49	2.47	↓	-0.7%
Uruguay	3.15	2.15	2.36	2.26	↓	-4.0%
Turkey	3.98	4.01	3.75	3.87	↑	+3.2%
New Zealand	16.14	24.10	23.36	23.54	↑	+0.8%
Vietnam	2.34	1.62	1.66	1.43	↓	-13.8%
Serbia	4.17	3.71	3.06	3.74	↑	+22.2%
Brazil	3.42	3.25	3.84	3.34	↓	-13.0%
El Salvador	3.53	2.23	2.21	2.61	↑	+18.4%
Guatemala	3.55	2.57	2.60	2.84	↑	+9.1%
Extra EU	2.52	2.23	2.19	2.17	↓	-0.8%

# Share of Exports of Honey in 2017



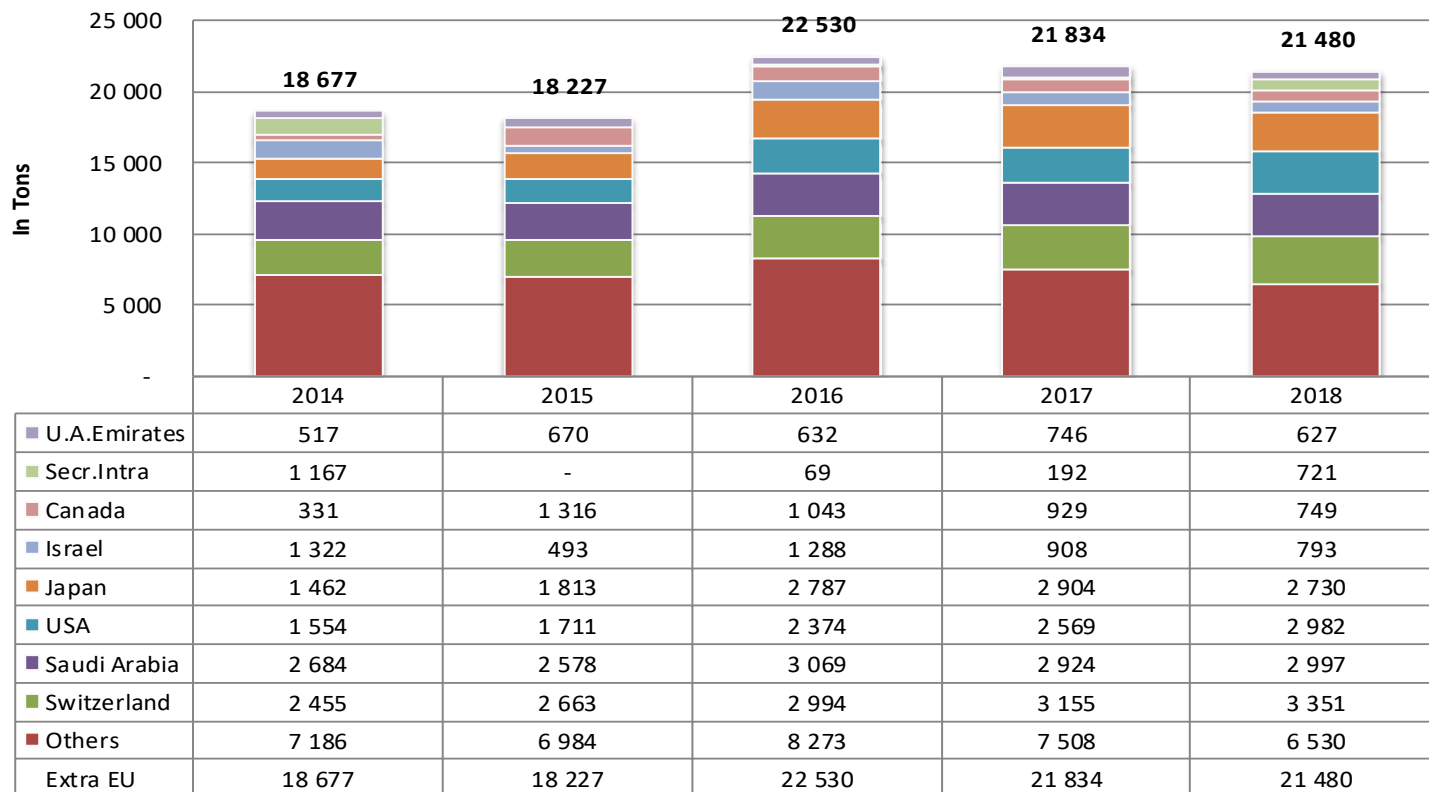
Source :UN Comtrade

# World Exports of Honey

	2016		2017		Share of World Imports	
	Tons	1 000 €	Tons	1 000 €	Tons	1 000 €
<b>Asia</b>	197 876	197 875 657	192 790	192 789 686	39.6%	41.5%
<i>of which China</i>	128 330	128 329 582	129 260	129 260 491	26.6%	27.8%
<b>European Union</b>	18 227	105 362	22 530	128 066	4.6%	0.0%
<b>South America</b>	120 240	120 239 969	111 774	111 773 603	23.0%	24.1%
<b>Central America and Carribeans</b>	33 409	33 409 170	30 341	30 340 978	6.2%	6.5%
<b>Other European Countries</b>	65 521	65 520 748	78 342	78 341 957	16.1%	16.9%
<b>North America</b>	25 353	25 353 418	27 225	27 225 379	5.6%	5.9%
<i>of which Canada</i>	17 954	17 954 499	19 485	19 484 861	4.0%	4.2%
<i>USA</i>	7 399	7 398 884	7 740	7 740 488	1.6%	1.7%
<b>Oceania and Polar Regions</b>	14 084	14 083 715	13 433	13 432 764	2.8%	2.9%
<b>Near and Middle Eastern Countries</b>	5 629	5 628 889	7 714	7 713 964	1.6%	1.7%
<b>Africa</b>	2 196	2 195 885	2 420	2 419 622	0.5%	0.5%
<b>Total</b>	<b>482 535</b>	<b>464 412 813</b>	<b>486 568</b>	<b>464 166 019</b>		

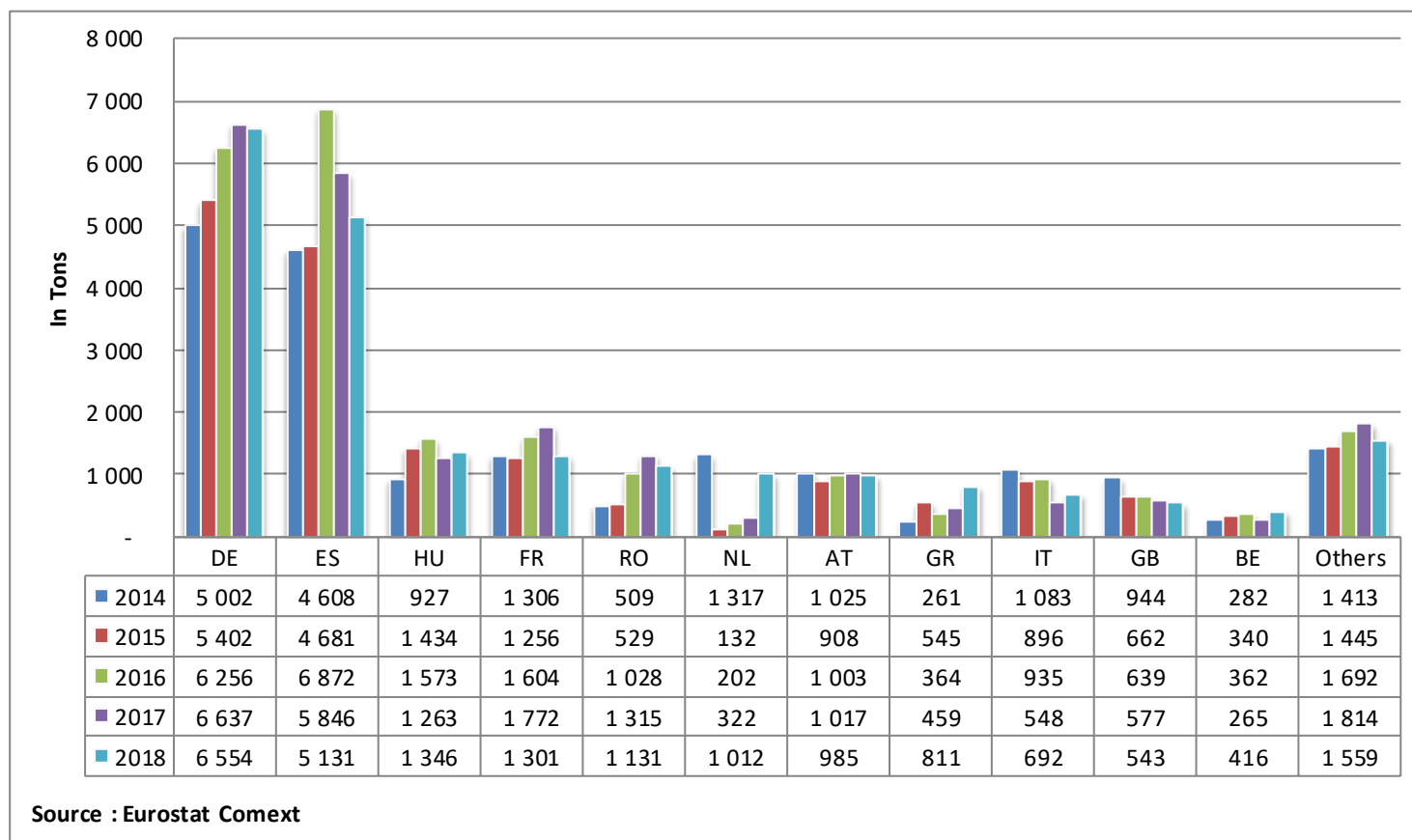
Source : UN Comtrade

# EU Exports of Honey by Destinations



Source : Eurostat Comext

## Member States Share of Export to Third Countries

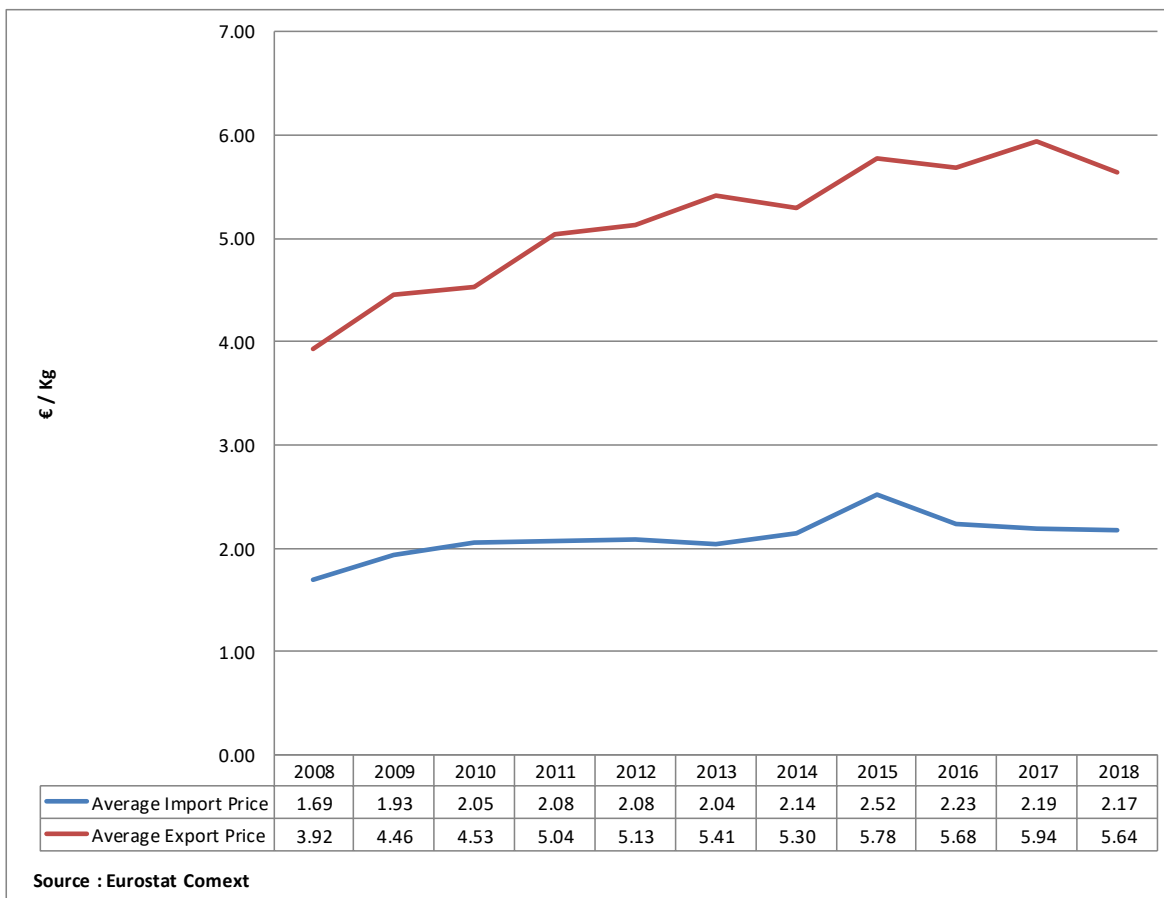


## EU Average Unit Value for Exported Honey (€/kg) by Destination

	2015	2016	2017	2018		
Switzerland	5.47	5.52	5.57	5.55	↓	-0.4%
Saudi Arabia	6.97	7.61	7.84	6.92	↓	-11.7%
Japan	5.93	5.58	5.49	5.22	↓	-4.9%
USA	6.38	7.08	7.37	6.45	↓	-12.5%
China	6.62	5.53	5.80	6.01	↑	+3.6%
Canada	3.56	3.79	3.75	4.15	↑	+10.8%
Israel	3.01	2.93	2.98	2.98	↑	+0.1%
U.A.Emirates	8.30	8.44	8.37	7.95	↓	-5.0%
Morocco	2.83	2.13	1.98	1.97	↓	-0.7%
Hong Kong	6.77	6.52	6.51	7.08	↑	+8.8%
Algeria	5.54	4.66	5.46	3.25	↓	-40.5%
Jordan	6.48	5.11	4.86	5.11	↑	+5.2%
Iraq	6.45	5.96	5.48	6.39	↑	+16.6%
Pakistan	6.77	7.10	6.12	6.13	↑	+0.1%
Ceuta	3.08	2.58	3.35	3.97	↑	+18.4%
<b>Extra EU</b>	<b>5.78</b>	<b>5.68</b>	<b>5.94</b>	5.64	↓	-5.1%

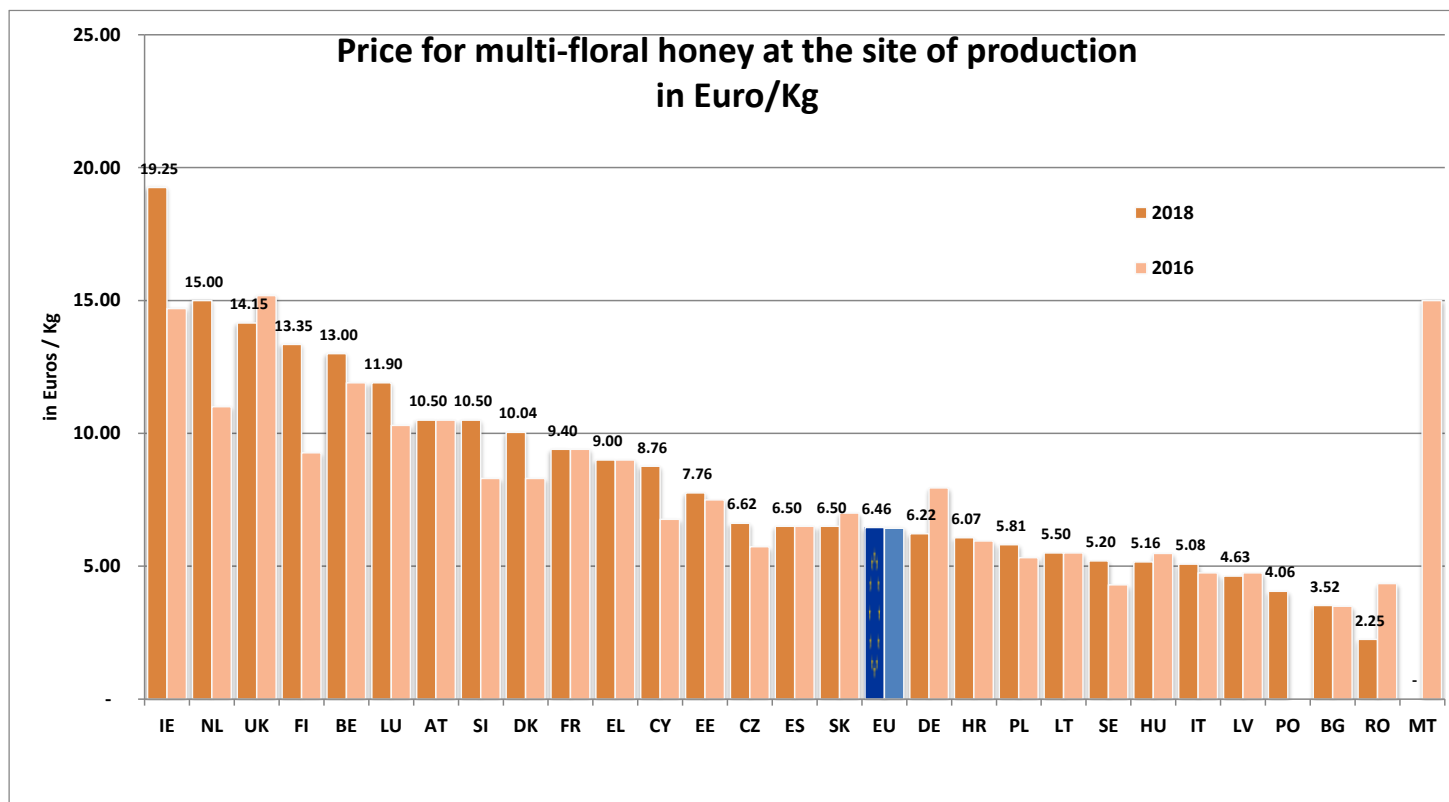
Source : Eurostat Comext

# Average Import and Export Prices

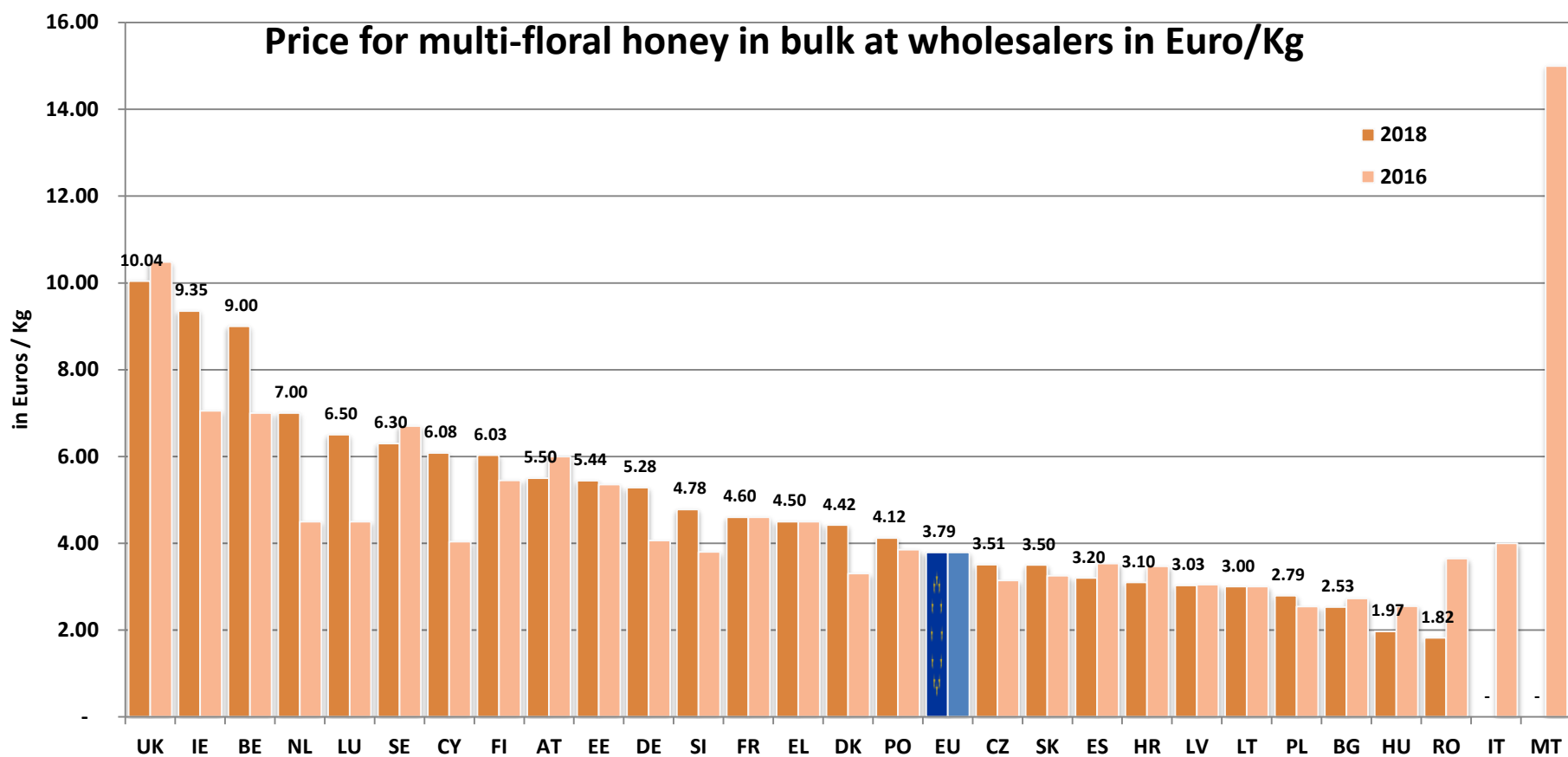




# Honey Price



# Honey Price



## 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**