



Honey Market Presentation

Spring 2020



Overview of EU honey market (1)

- EU second world producer (280 000 tons) after China
- Total number of beehives: 18.5 millions in 2019 (+5.1% since 2018)
- Total number of beekeepers: 650 000
- Small sector but important for agriculture for pollinisation



Spring 2020

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 (just below 40% of EU imports), and Ukraine (just above 20% of EU imports)
- EU honey trade balance largely negative: Imports > Exports

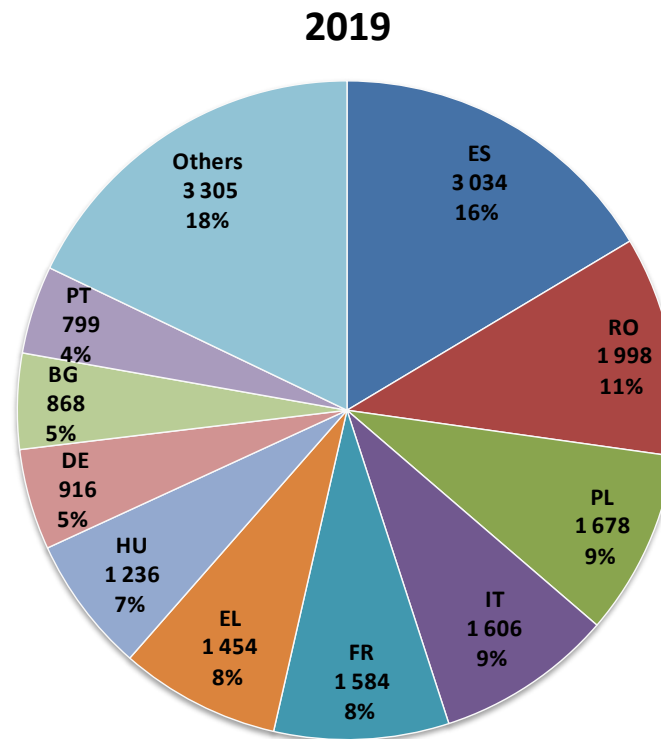


Spring 2020

Number of hives (in thousand)



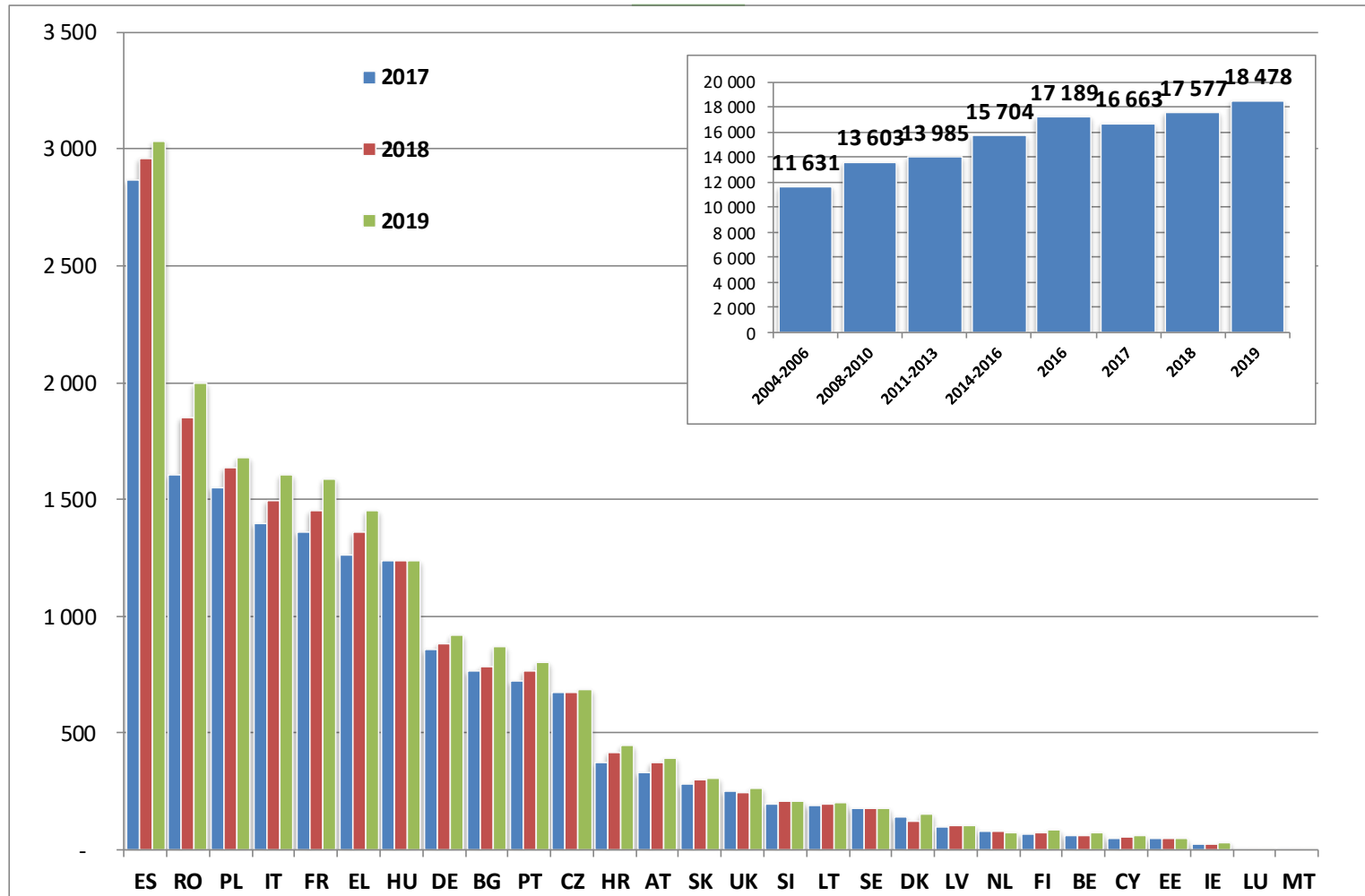
	2018	2019		
ES	2 961	3 034	↑	+2.4%
RO	1 849	1 998	↑	+8.1%
PL	1 633	1 678	↑	+2.7%
IT	1 494	1 606	↑	+7.5%
FR	1 454	1 584	↑	+9.0%
EL	1 361	1 454	↑	+6.9%
HU	1 237	1 236	↓	-0.0%
DE	879	916	↑	+4.2%
BG	783	868	↑	+10.8%
PT	768	799	↑	+4.1%
CZ	673	685	↑	+1.8%
HR	419	444	↑	+6.0%
AT	373	391	↑	+4.8%
SK	302	307	↑	+1.8%
UK	244	264	↑	+8.0%
SI	205	208	↑	+1.7%
LT	197	202	↑	+2.6%
SE	174	174	→	+0.0%
DK	120	153	↑	+27.3%
LV	103	103	↑	+0.3%
NL	82	75	↓	-8.1%
FI	72	84	↑	+16.0%
BE	60	70	↑	+17.6%
CY	51	57	↑	+12.2%
EE	49	49	↑	+1.2%
IE	25	27	↑	+10.1%
LU	6	7	↑	+11.2%
MT	4	4	→	+0.0%
EU	17 577	18 478	↑	+5.1%



Source: Member States National apiculture programmes 2020-2022, notified in March 2019 "MSs NAPs"

22 April 2020

Number of hives (in thousands)



22 April 2020

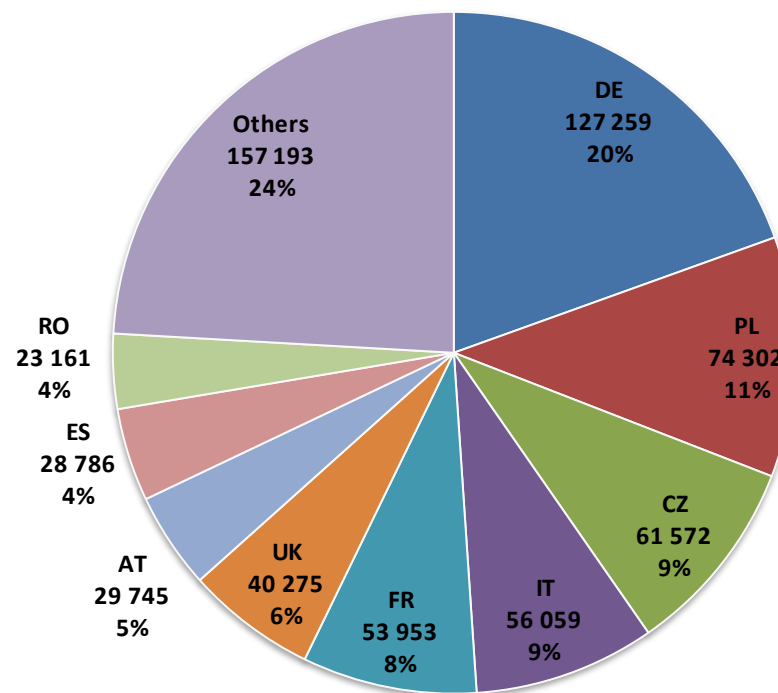
Source: MSs NAPs

Number of beekeepers



European
Commission

	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%



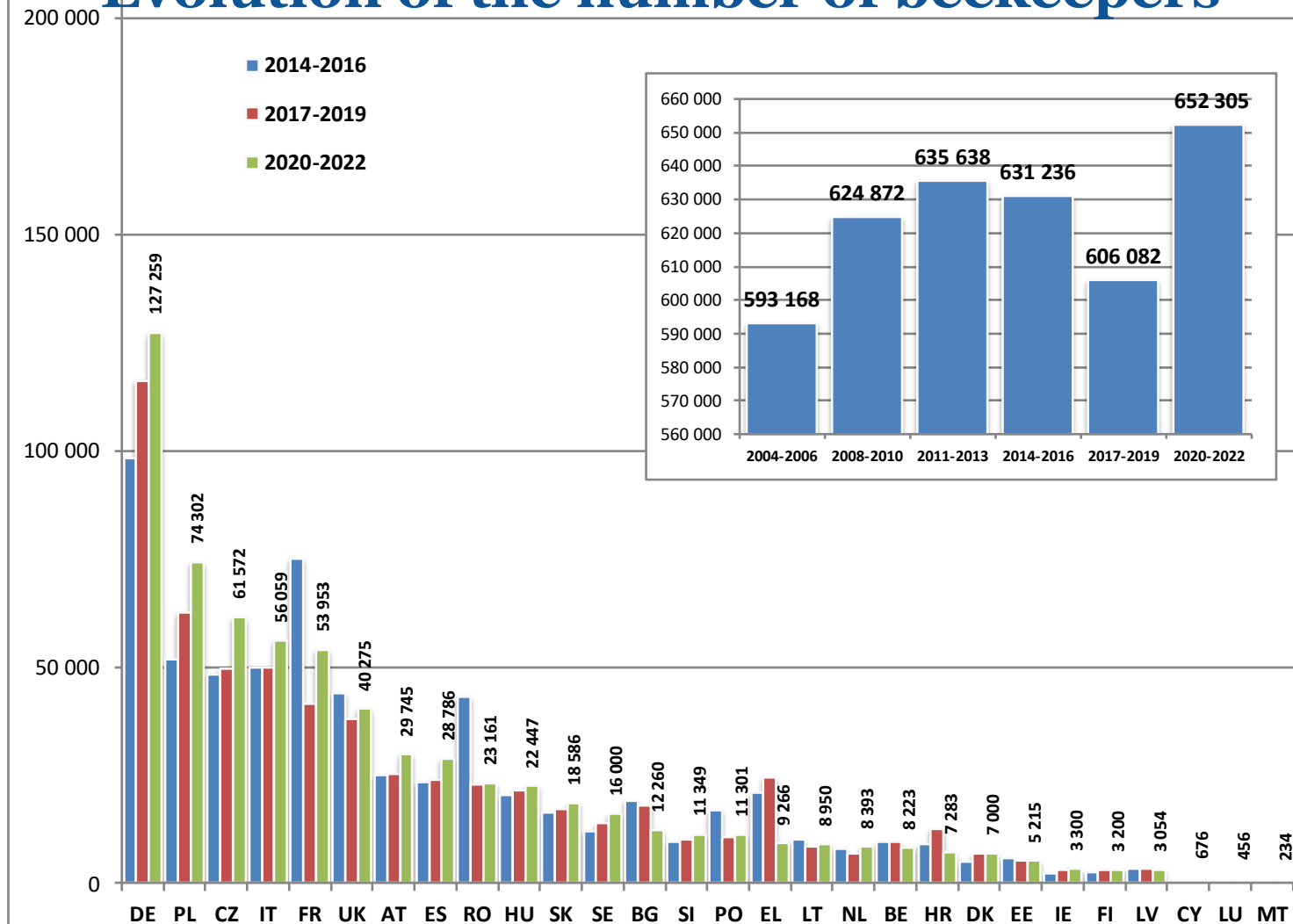
Source: MSs NAPs

Number of beekeepers

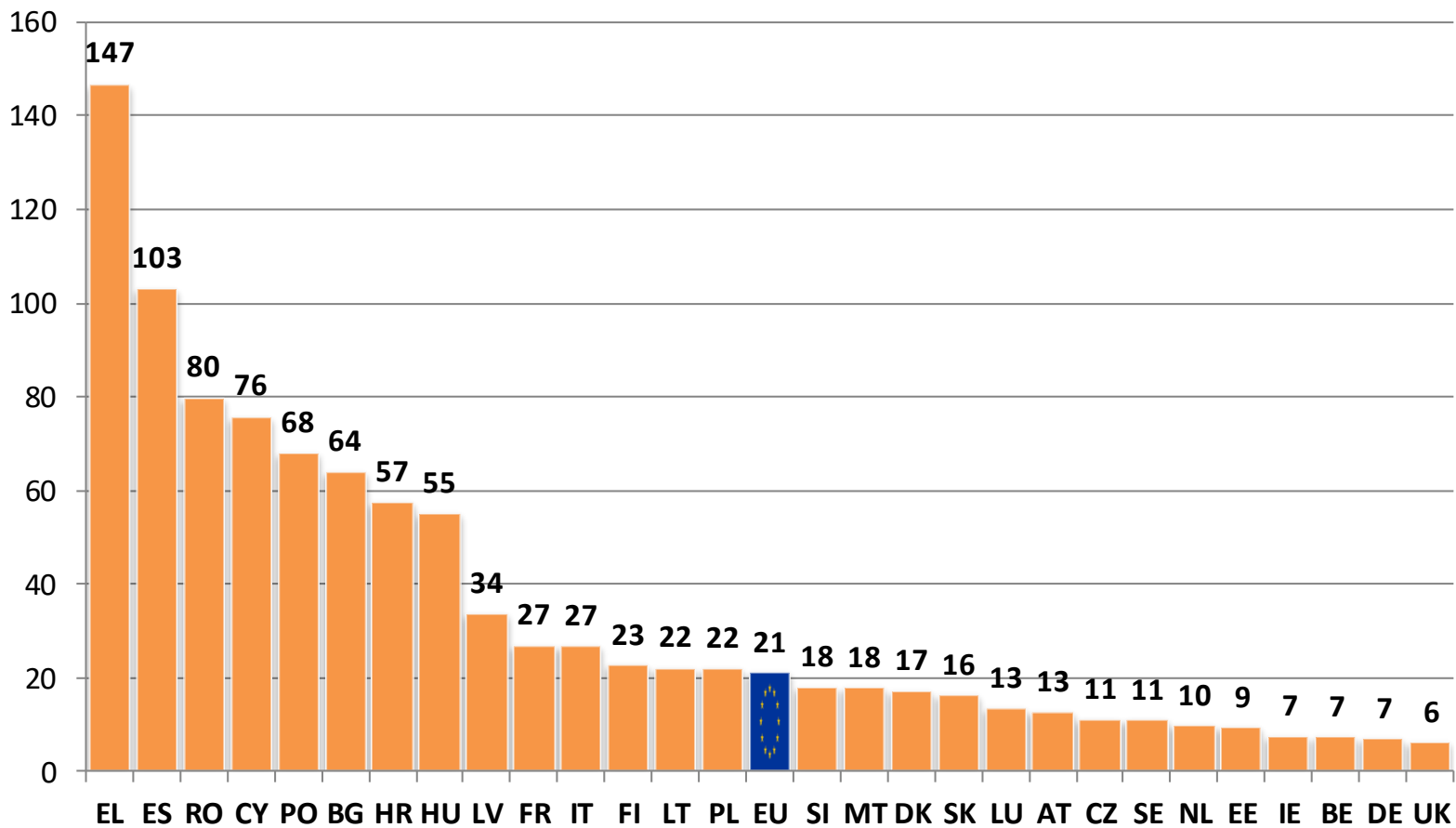
Source: MSs NAPs



Evolution of the number of beekeepers

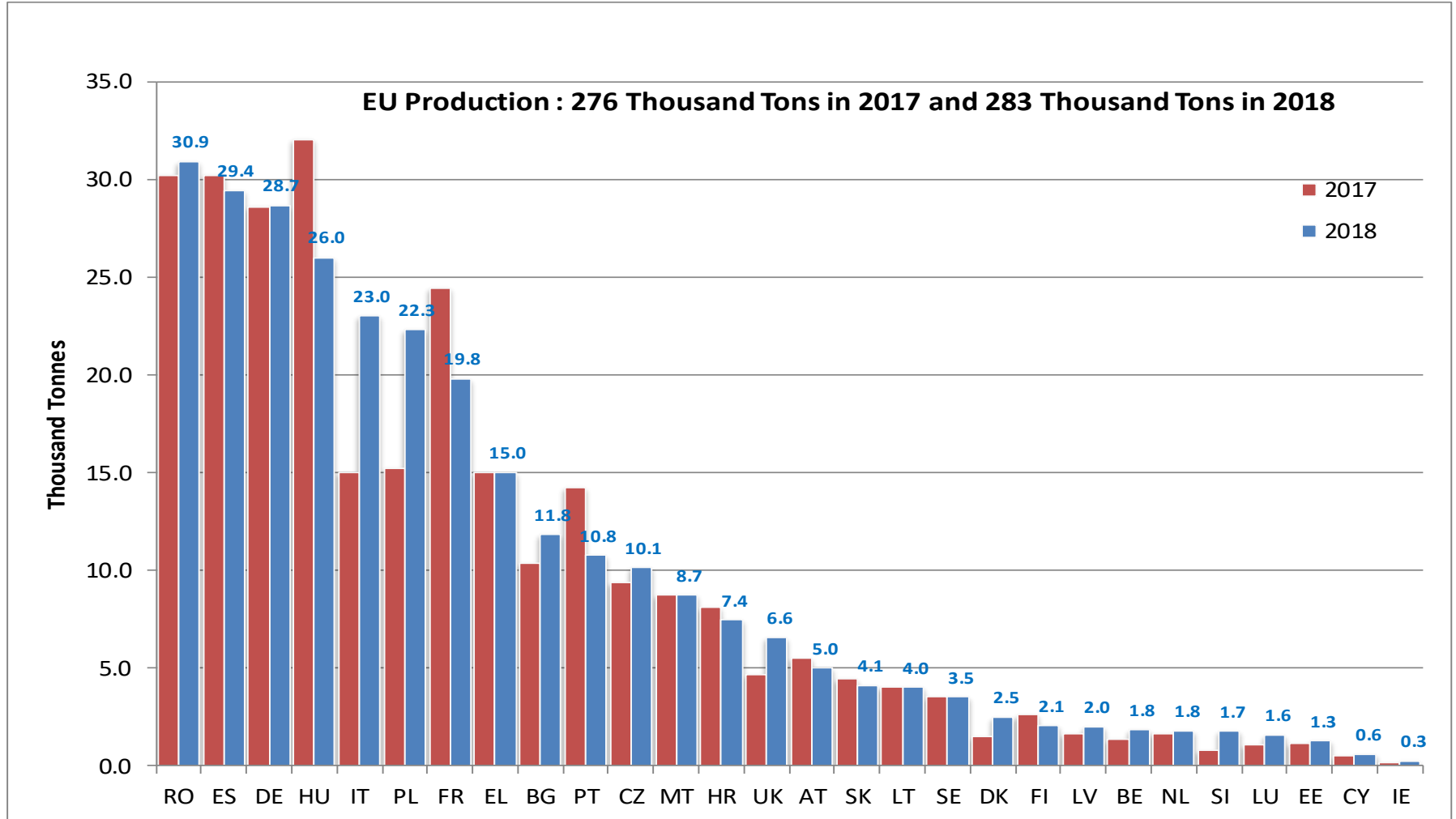


Average Number of Hives per Beekeeper (2018)



Source: MSS NAPS

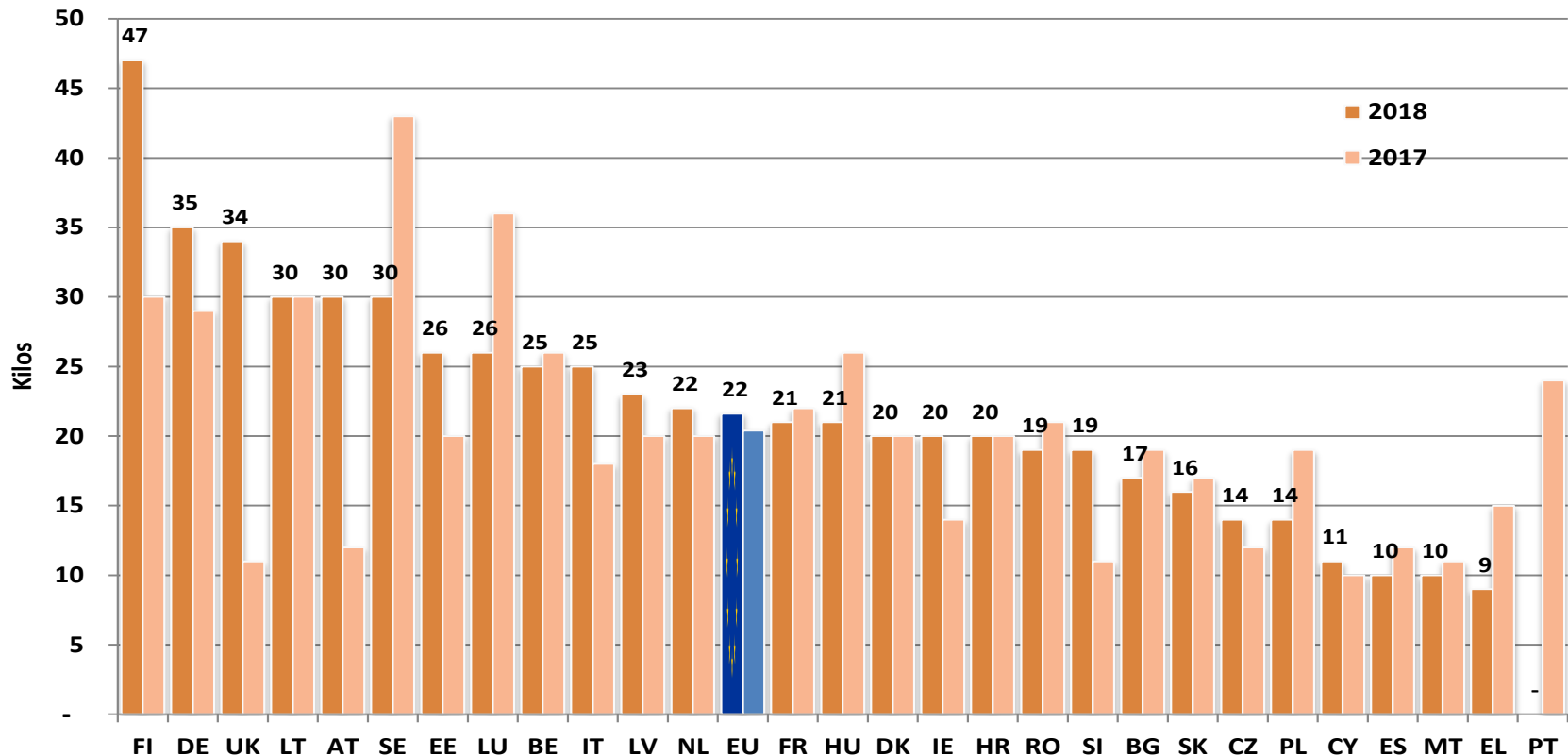
EU Honey Production UPDATED



Spring 2020

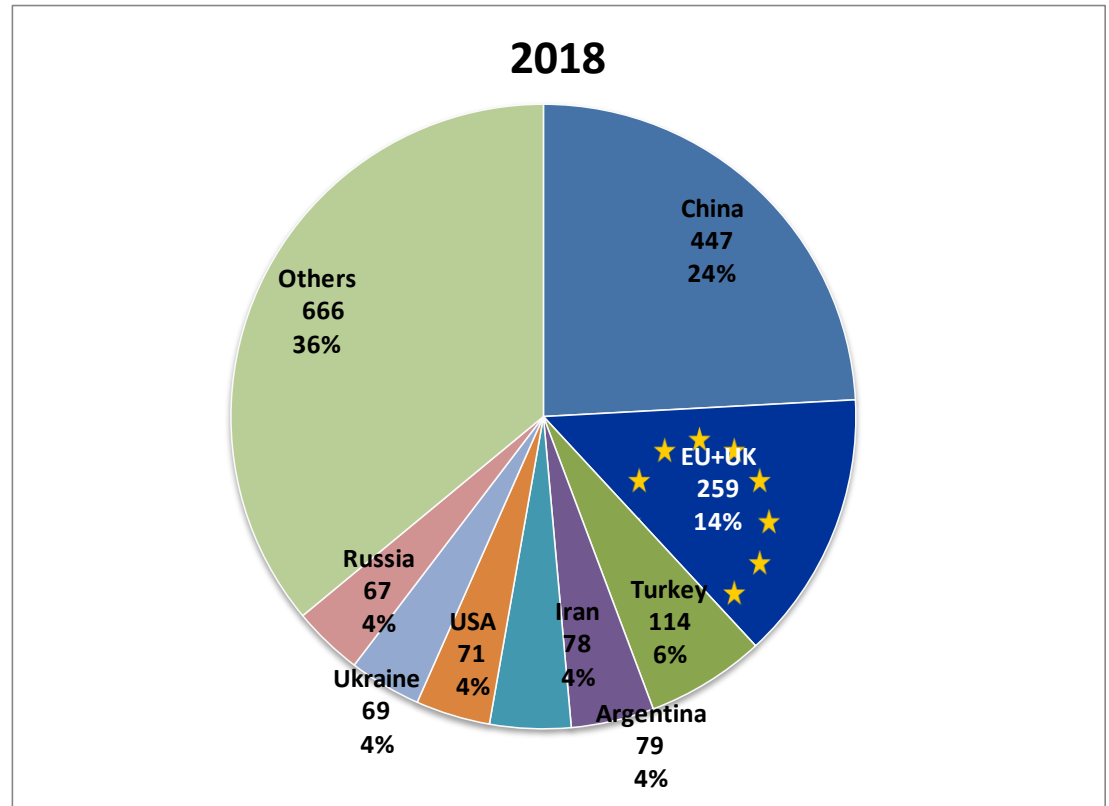
Source: MSs NAPs

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



World Production of Honey per Country (1 000 T)

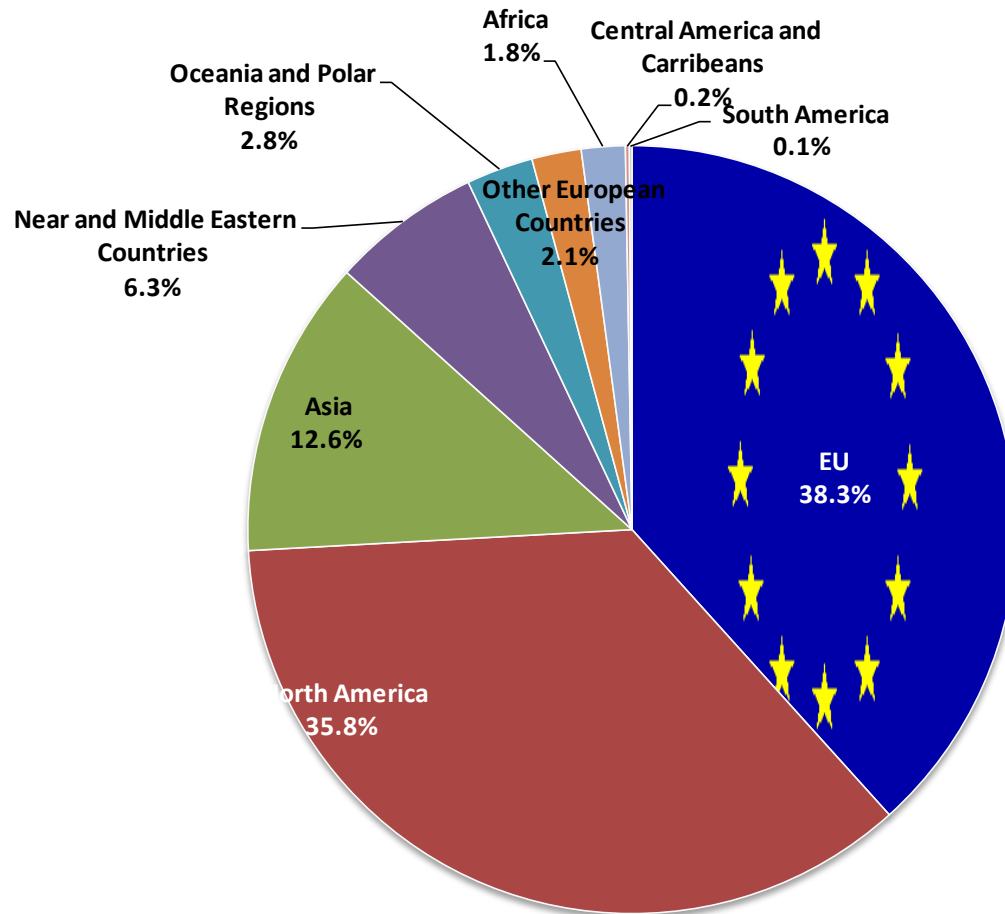
	2017	2018	Share of World Production
China	543	447	24%
EU	248	259	14%
Turkey	114	114	6%
Argentina	76	79	4%
Iran	71	78	4%
USA	66	71	4%
Ukraine	68	69	4%
Russia	66	67	4%
India	65	65	4%
Mexico	51	64	3%
Ethiopia	50	50	3%
Brazil	42	42	2%
Canada	39	39	2%
United Republic of	30	31	2%
Republic of Korea	26	27	1%
Angola	23	23	1%
Uruguay	18	21	1%
Viet Nam	20	20	1%
Kenya	19	20	1%
Central African Republic	15	20	1%
Mali	16	16	1%
New Zealand	12	13	1%
Australia	12	12	1%
Other	188	203	11%
	1 879	1 851	



Source : FAO

Spring 2020

Share of Imports of Honey in 2018



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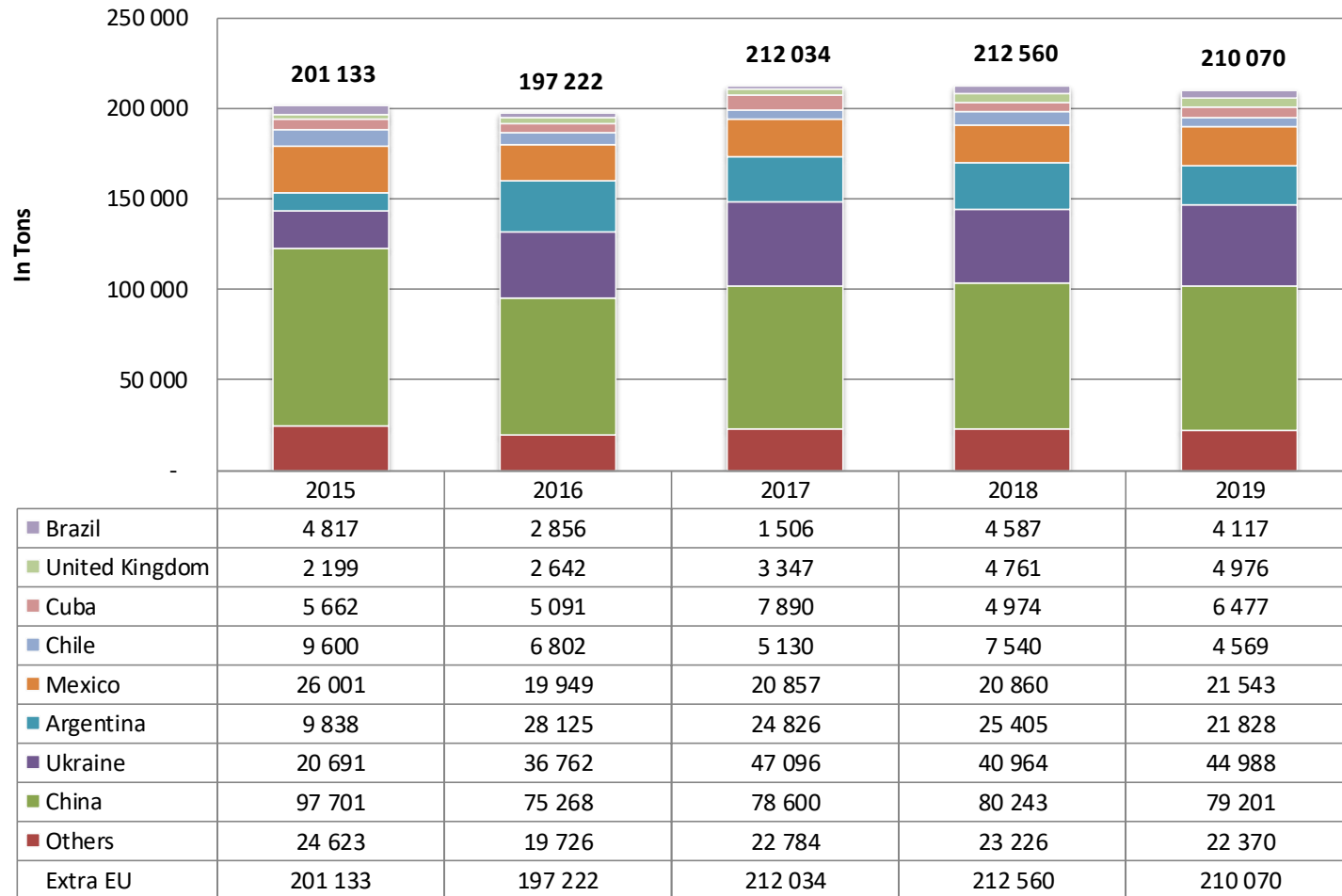
Source : UN Comtrade

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	197 867	421 395	36.7%	31.6%
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	3 824	59 362	0.7%	4.4%
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

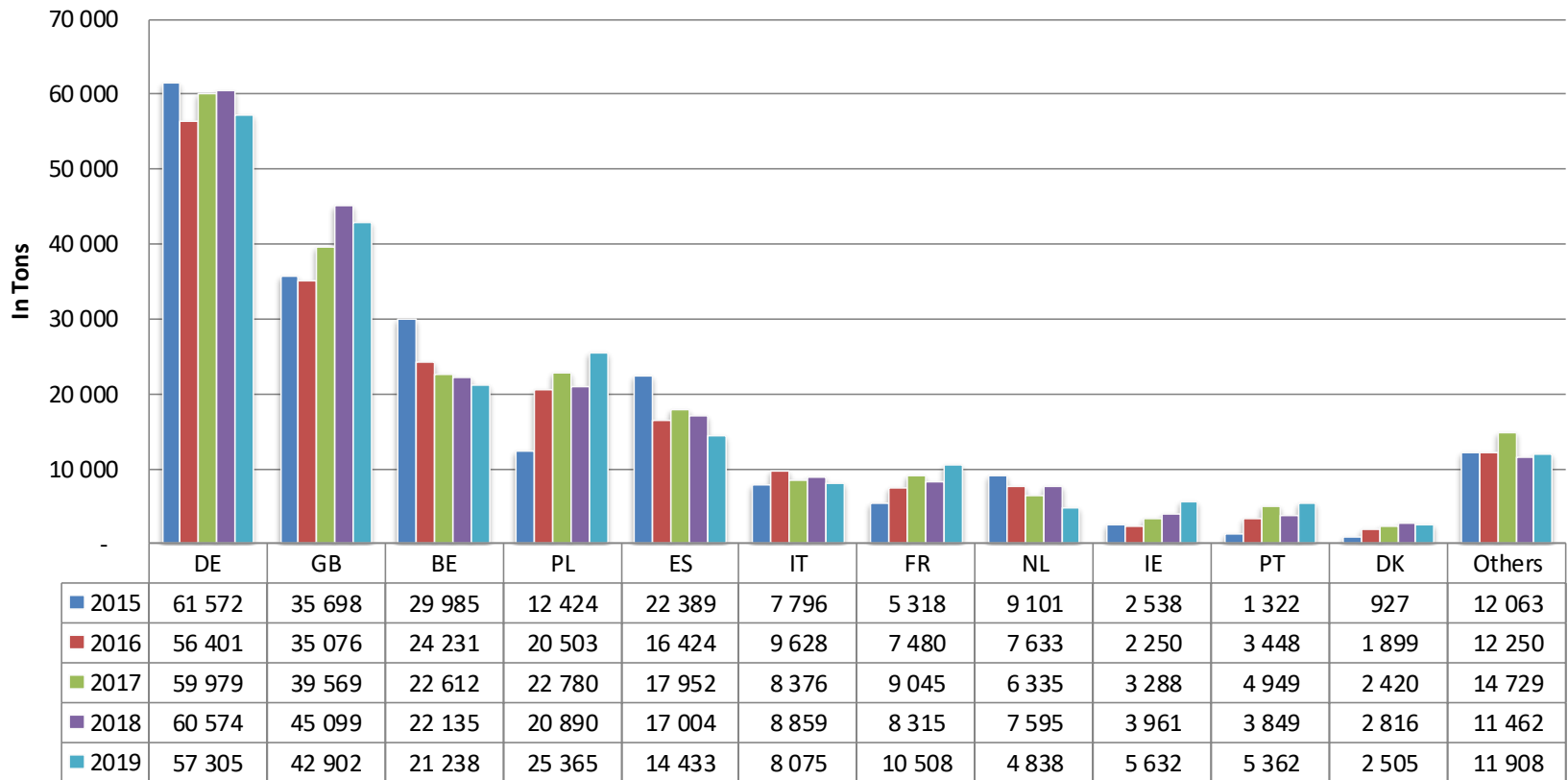
EU Imports of Honey by Origin (in Tons)



Source : Eurostat Comext

Spring 2020

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



Source : Eurostat Comext

Spring 2020

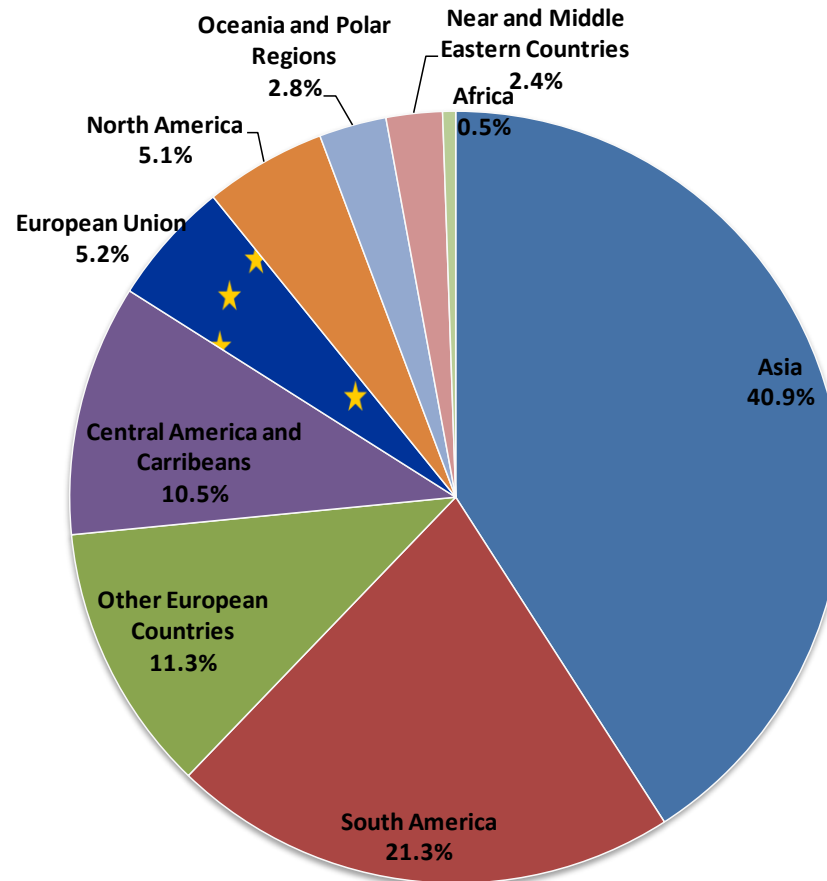
EU Average Unit Value for Imported Honey (€/Kg) by Origin

	2016	2017	2018	2019		
China	1.58	1.47	1.30	1.23	↓	-5.0%
Ukraine	1.76	1.74	1.84	1.68	↓	-8.5%
Argentina	2.12	2.23	2.34	2.27	↓	-2.9%
Mexico	2.96	2.80	2.82	2.48	↓	-12.2%
Cuba	2.42	2.34	2.40	2.11	↓	-12.2%
Uruguay	2.15	2.36	2.26	1.99	↓	-11.9%
United Kingdom	5.19	4.88	4.73	4.24	↓	-10.4%
Chile	2.77	2.89	2.96	2.71	↓	-8.2%
Brazil	3.25	3.84	3.34	2.62	↓	-21.7%
Moldova	2.59	2.49	2.47	2.69	↑	+8.9%
Turkey	4.01	3.76	3.87	3.46	↓	-10.8%
New Zealand	24.10	23.36	23.54	19.09	↓	-18.9%
Vietnam	1.62	1.64	1.42	1.37	↓	-3.5%
Serbia	3.71	3.06	3.74	3.51	↓	-6.1%
Guatemala	2.57	2.60	2.84	2.31	↓	-18.4%
Extra EU	2.27	2.24	2.23	2.05	↓	-7.9%
Extra EU (excl. NZ)	2.26	2.23	2.22	2.04	↓	-7.8%

Spring 2020

Source : Eurostat Comext

Share of Exports of Honey in 2018



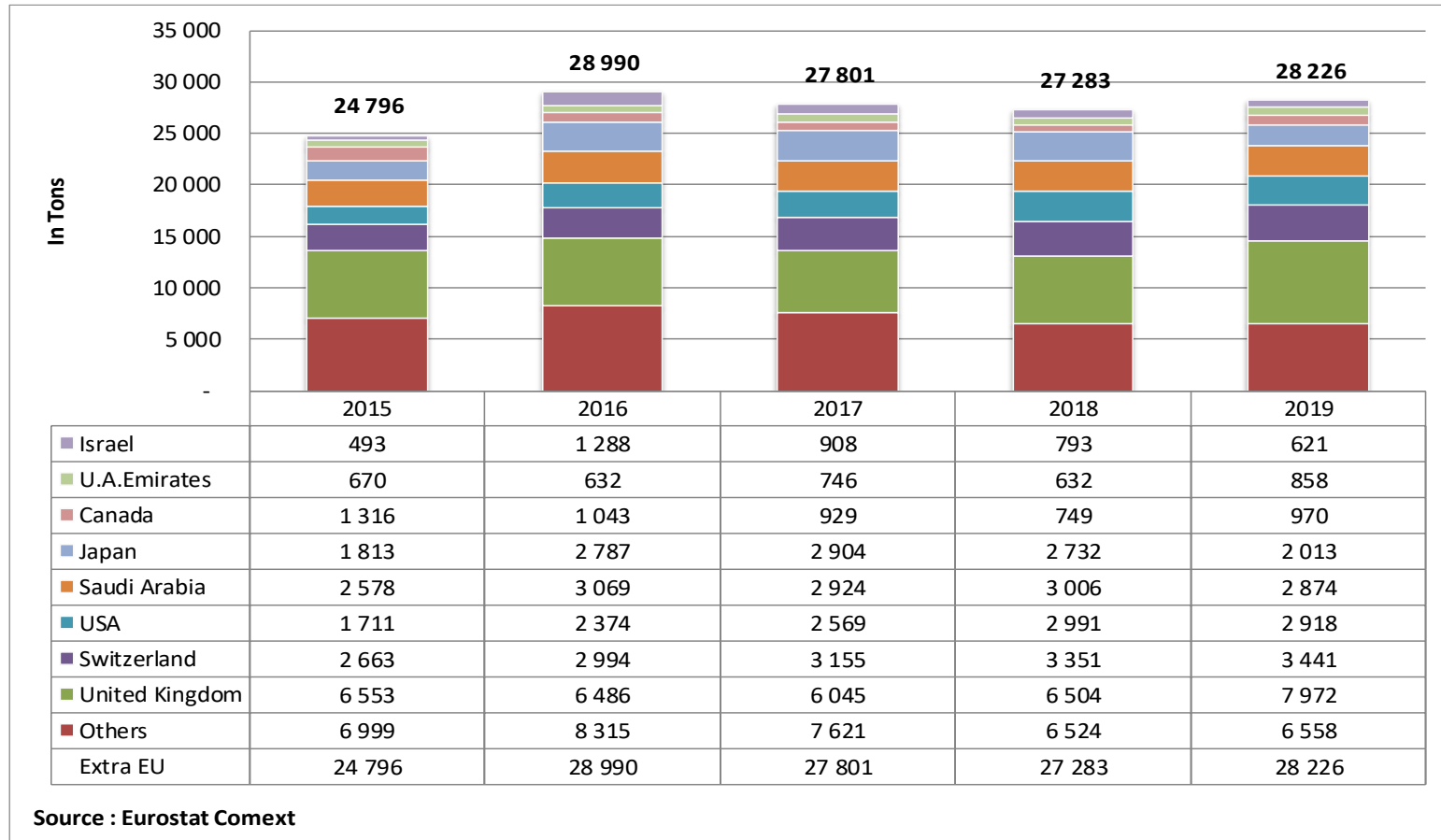
Source :UN Comtrade

World Exports of Honey

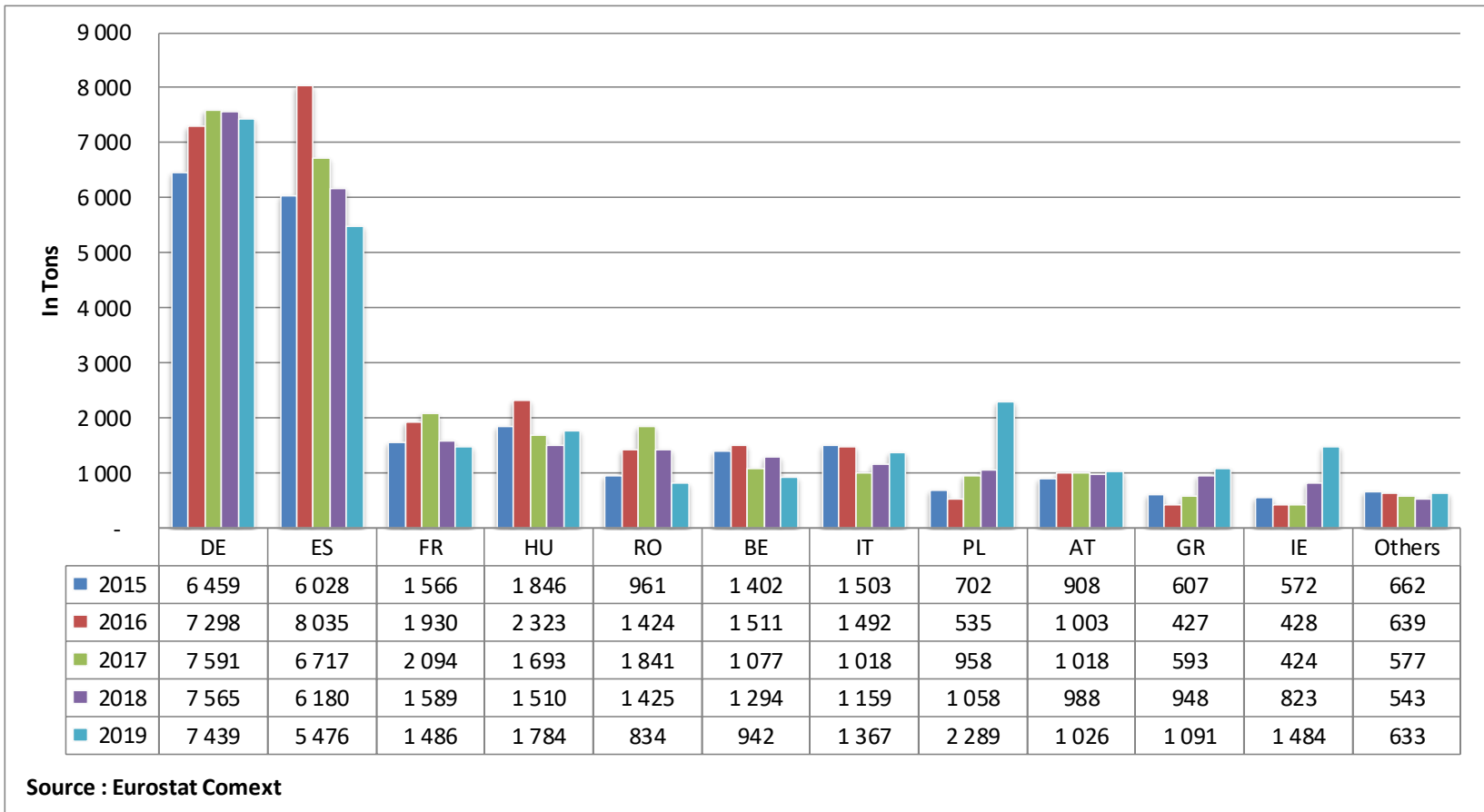
	2017		2018		Share of World Imports	
	Tons	1 000 €	Tons	1 000 €	Tons	1 000 €
Asia	219 909	441 525	214 336	398 202	40.9%	28.7%
<i>of which China</i>	129 260	239 570	123 477	211 027	23.6%	15.2%
European Union	27 801	160 047	27 283	150 078	5.2%	10.8%
South America	111 774	306 635	111 411	261 019	21.3%	18.8%
Other European Countries	78 342	152 542	59 049	113 847	11.3%	8.2%
Central America and Carribeans	31 523	102 681	55 170	100 105	10.5%	7.2%
North America	27 190	76 945	26 691	73 315	5.1%	5.3%
<i>of which Canada</i>	19 462	53 632	18 837	51 807	3.6%	3.7%
<i>USA</i>	7 728	23 313	7 853	21 508	1.5%	1.5%
Oceania and Polar Regions	13 433	264 420	14 782	235 405	2.8%	17.0%
Near and Middle Eastern Countries	15 221	61 479	12 337	46 267	2.4%	3.3%
Africa	2 695	8 765	2 843	9 640	0.5%	0.7%
Total	527 888	1 575 040	523 901	1 387 878		

Source : UN Comtrade

EU Exports of Honey by Destinations



Member States Share of Export to Third Countries



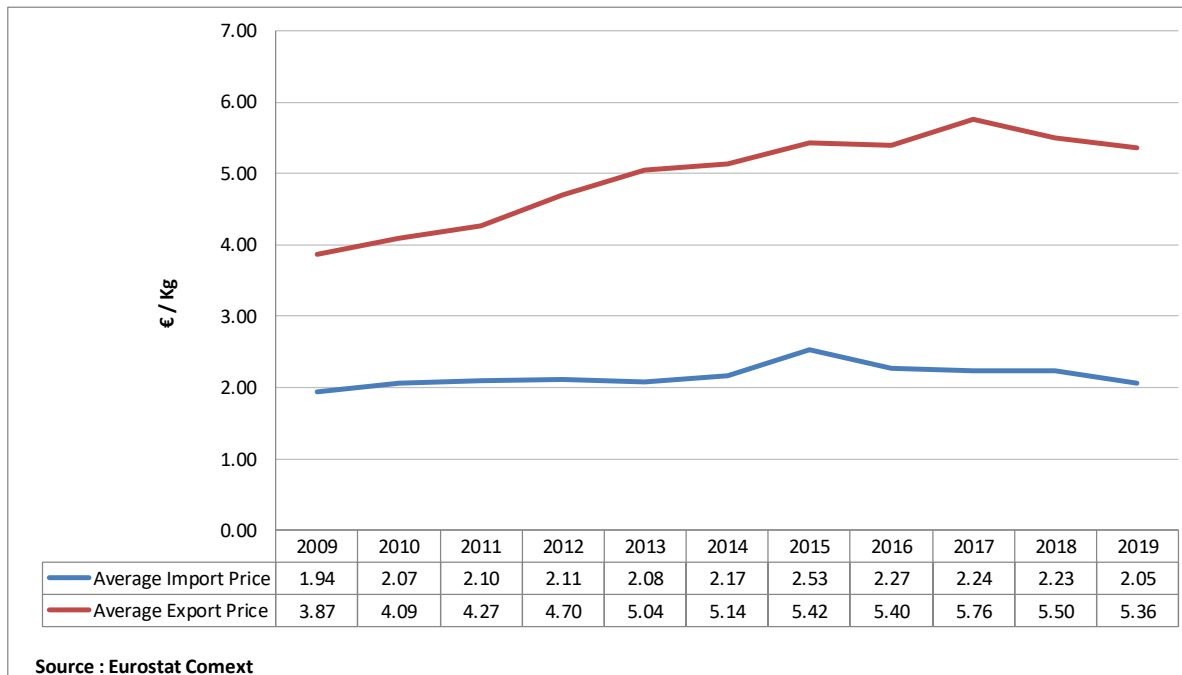
EU Average Unit Value for Exported Honey (€/kg) by Destination

	2016	2017	2018	2019	
United Kingdom	4.37	5.05	4.84	3.92	↓ -18.9%
Switzerland	5.52	5.57	5.55	5.42	↓ -2.2%
USA	7.08	7.37	6.44	6.69	↑ +4.0%
Saudi Arabia	7.61	7.84	6.91	7.75	↑ +12.1%
Japan	5.58	5.49	5.22	5.75	↑ +10.2%
Canada	3.79	3.75	4.15	3.90	↓ -6.1%
U.A.Emirates	8.44	8.37	7.97	7.80	↓ -2.1%
Israel	2.93	2.98	2.98	2.91	↓ -2.3%
Algeria	4.66	5.46	3.25	3.14	↓ -3.3%
China	5.53	5.80	6.01	6.27	↑ +4.3%
Norway	5.99	5.17	6.12	5.54	↓ -9.5%
South Africa	3.00	9.87	2.23	2.30	↑ +3.3%
Ceuta	2.58	3.35	3.97	3.48	↓ -12.2%
Hong Kong	6.52	6.51	7.08	7.24	↑ +2.2%
Iraq	5.96	5.48	6.39	6.06	↓ -5.1%
Extra EU	5.40	5.76	5.50	5.36	↓ -2.5%

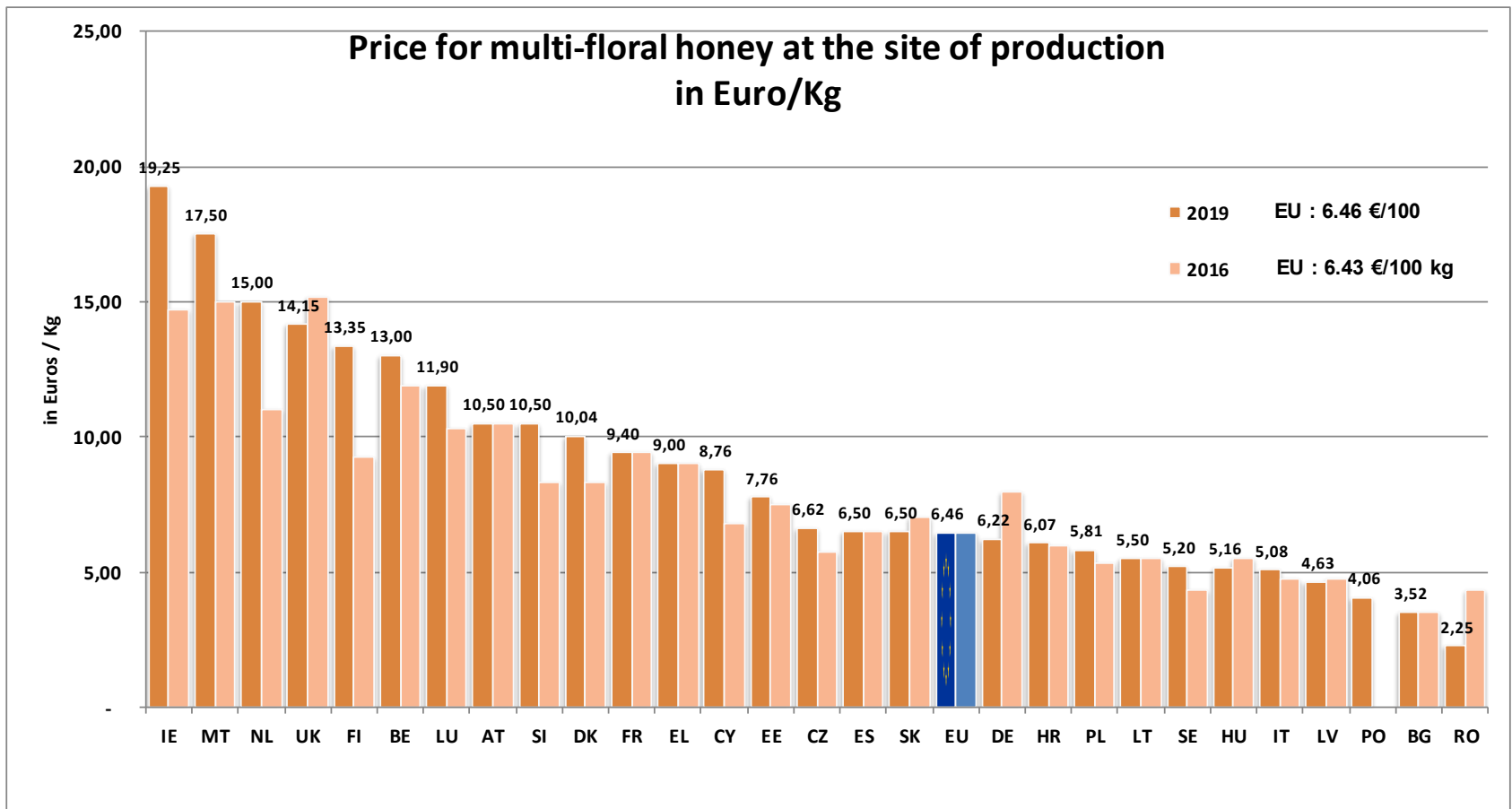
Spring 2020

Source : Eurostat Comext

Average Import and Export Prices



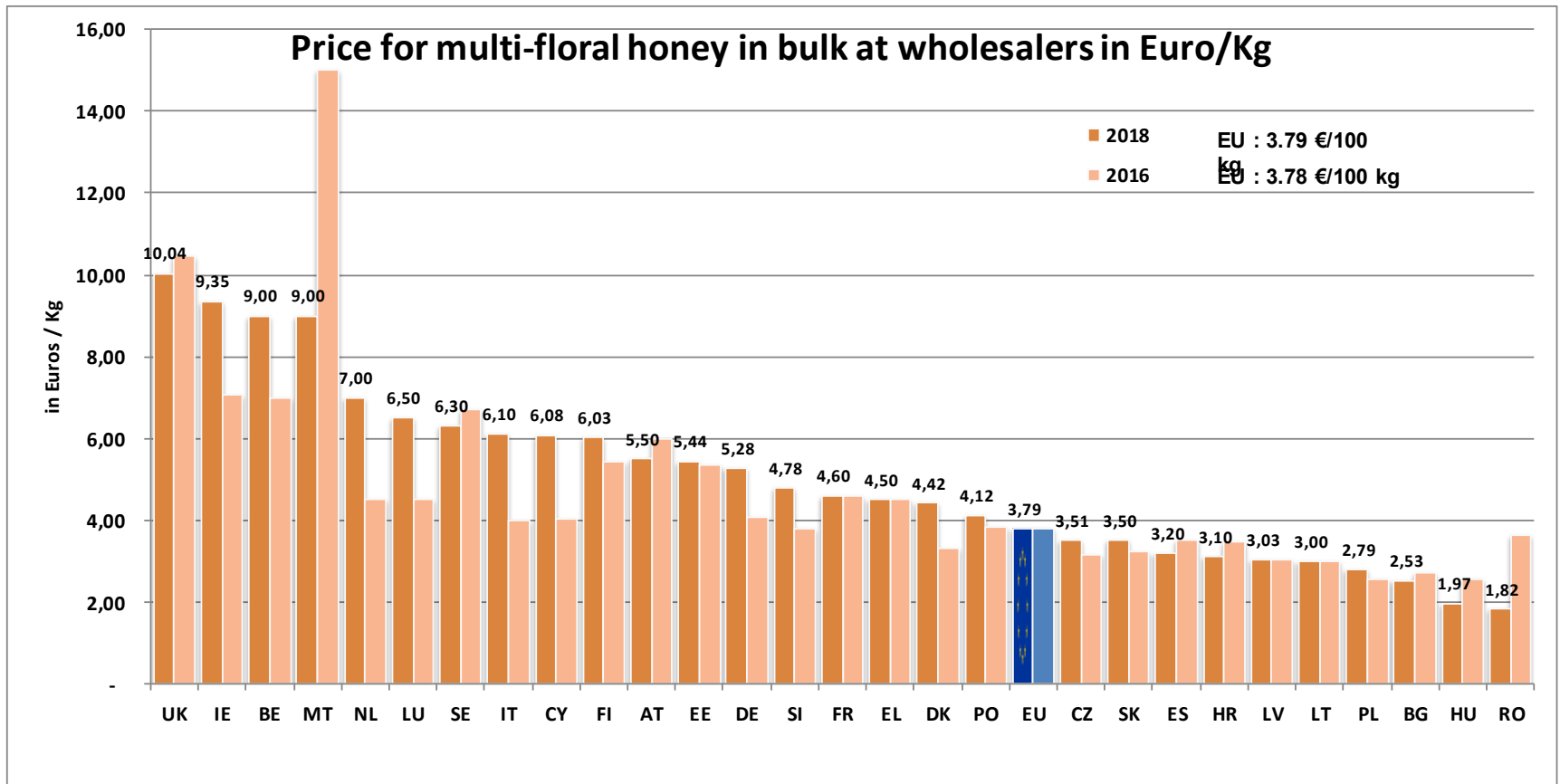
Honey Price



Spring 2020

Source: MSs NAPs

Honey Price



Spring 2020

Source: MSs NAPs



Where to find data:

New homepage

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