



# Honey Market Presentation

***Spring 2021***



# Overview of EU honey market (1)

- EU second world producer (280 000 tons) after China
- Total number of beehives: 18.9 millions in 2020 (+3.9% since 2019)
- Total number of beekeepers: 615 058
- Small sector but important for agriculture for pollinisation



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# 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: Ukraine (just below 30% of EU imports), and China (just above 20% of EU imports)
- EU honey trade balance largely negative: Imports > Exports



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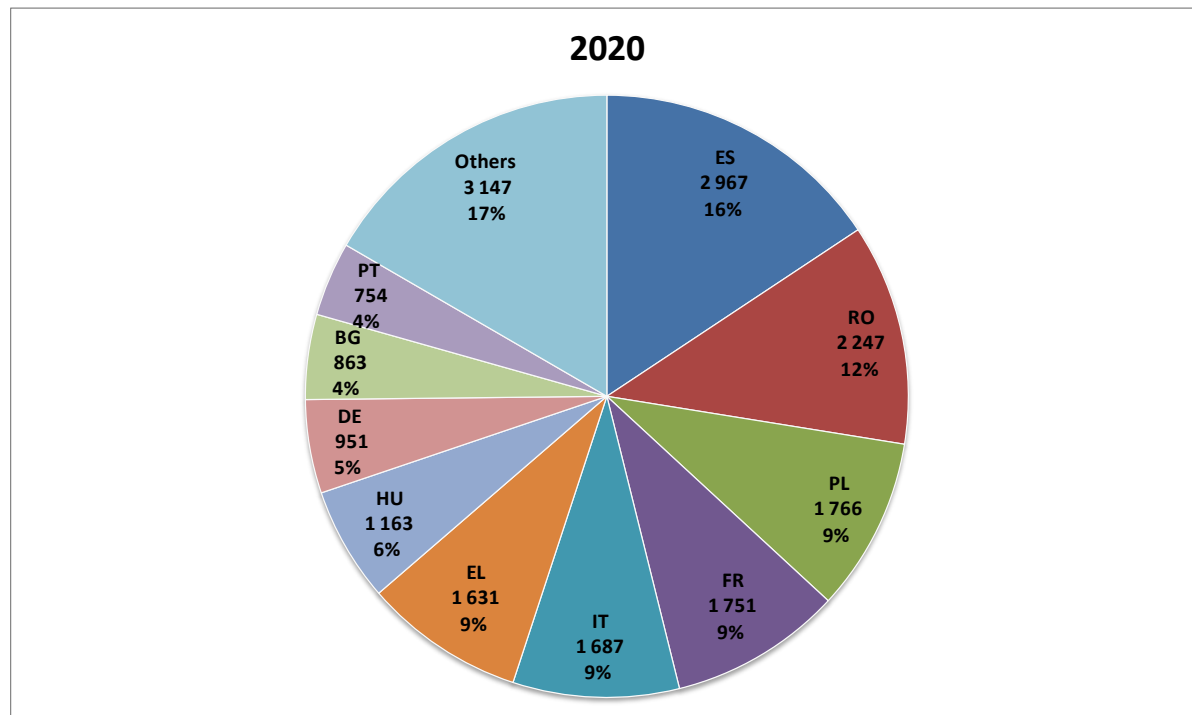
# Number of hives (in thousand)



|    | 2019   | 2020   |          |
|----|--------|--------|----------|
| ES | 3 034  | 2 967  | ↓ -2.2%  |
| RO | 1 998  | 2 247  | ↑ +12.5% |
| PL | 1 678  | 1 766  | ↑ +5.2%  |
| FR | 1 584  | 1 751  | ↑ +10.5% |
| IT | 1 606  | 1 687  | ↑ +5.0%  |
| EL | 1 454  | 1 631  | ↑ +12.2% |
| HU | 1 236  | 1 163  | ↓ -5.9%  |
| DE | 916    | 951    | ↑ +3.8%  |
| BG | 868    | 863    | ↓ -0.5%  |
| PT | 799    | 754    | ↓ -5.7%  |
| CZ | 685    | 694    | ↑ +1.3%  |
| HR | 444    | 461    | ↑ +3.7%  |
| AT | 391    | 426    | ↑ +9.1%  |
| SK | 307    | 335    | ↑ +9.1%  |
| SI | 208    | 214    | ↑ +2.6%  |
| SE | 174    | 179    | ↑ +2.9%  |
| DK | 153    | 144    | ↓ -5.7%  |
| LV | 103    | 104    | ↑ +1.1%  |
| FI | 84     | 82     | ↓ -2.0%  |
| NL | 75     | 80     | ↑ +6.4%  |
| BE | 70     | 76     | ↑ +7.8%  |
| CY | 57     | 58     | ↑ +1.3%  |
| EE | 49     | 48     | ↓ -2.8%  |
| IE | 27     | 27     | ↑ +0.9%  |
| LU | 7      | 5      | ↓ -23.0% |
| MT | 4      | 5      | ↑ +18.6% |
| LT | 202    | 209    | ↑ +3.4%  |
| EU | 18 214 | 18 926 | ↑ +3.9%  |

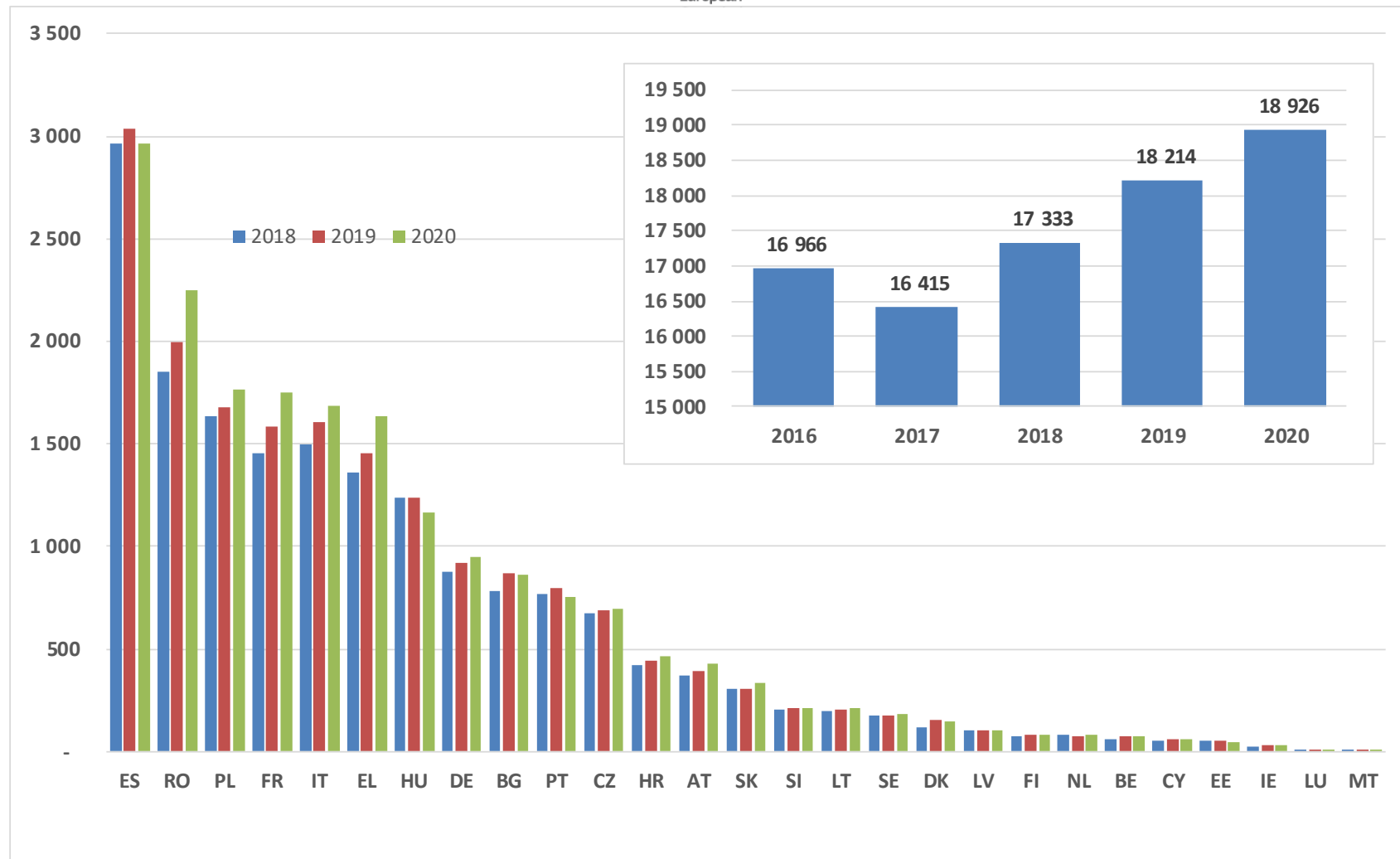
Source : MS notifications

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**Source: Member States National apiculture programmes 2020-2022, notified in March 2021 "MSs NAPs"**

# Number of hives (in thousands)

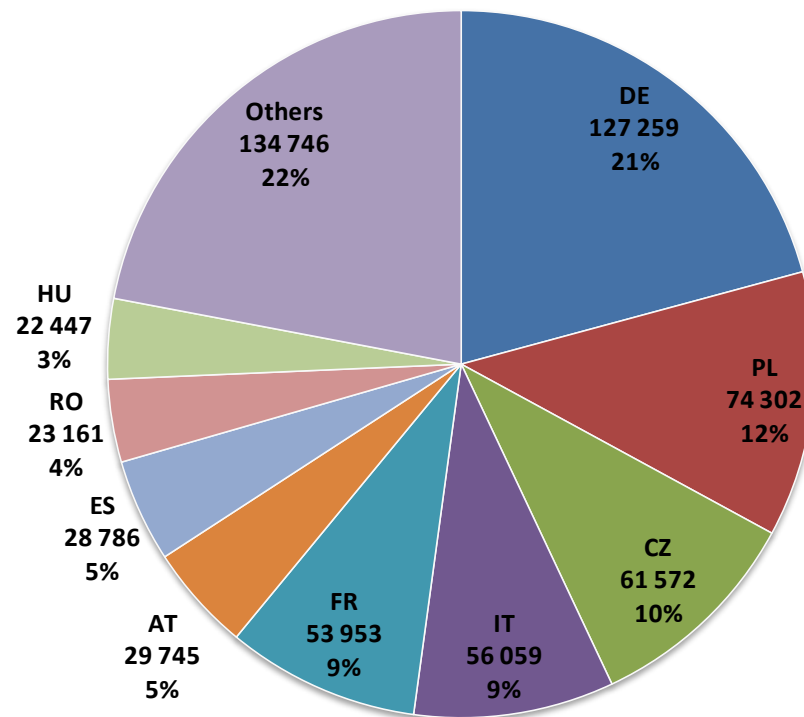


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# Number of beekeepers



|    | 2017-2019 | 2020-2022 |          |
|----|-----------|-----------|----------|
| DE | 116.000   | 129.048   | ↑ +11,2% |
| 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% |
| 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     | 9.345     | ↑ +33,5% |
| 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     | 3.341     | ↑ +1,8%  |
| CY | 691       | 676       | ↓ -2,2%  |
| LU | 337       | 456       | ↑ +35,3% |
| MT | 208       | 234       | ↑ +12,5% |
| EU | 568.194   | 615.058   | ↑ +8,2%  |



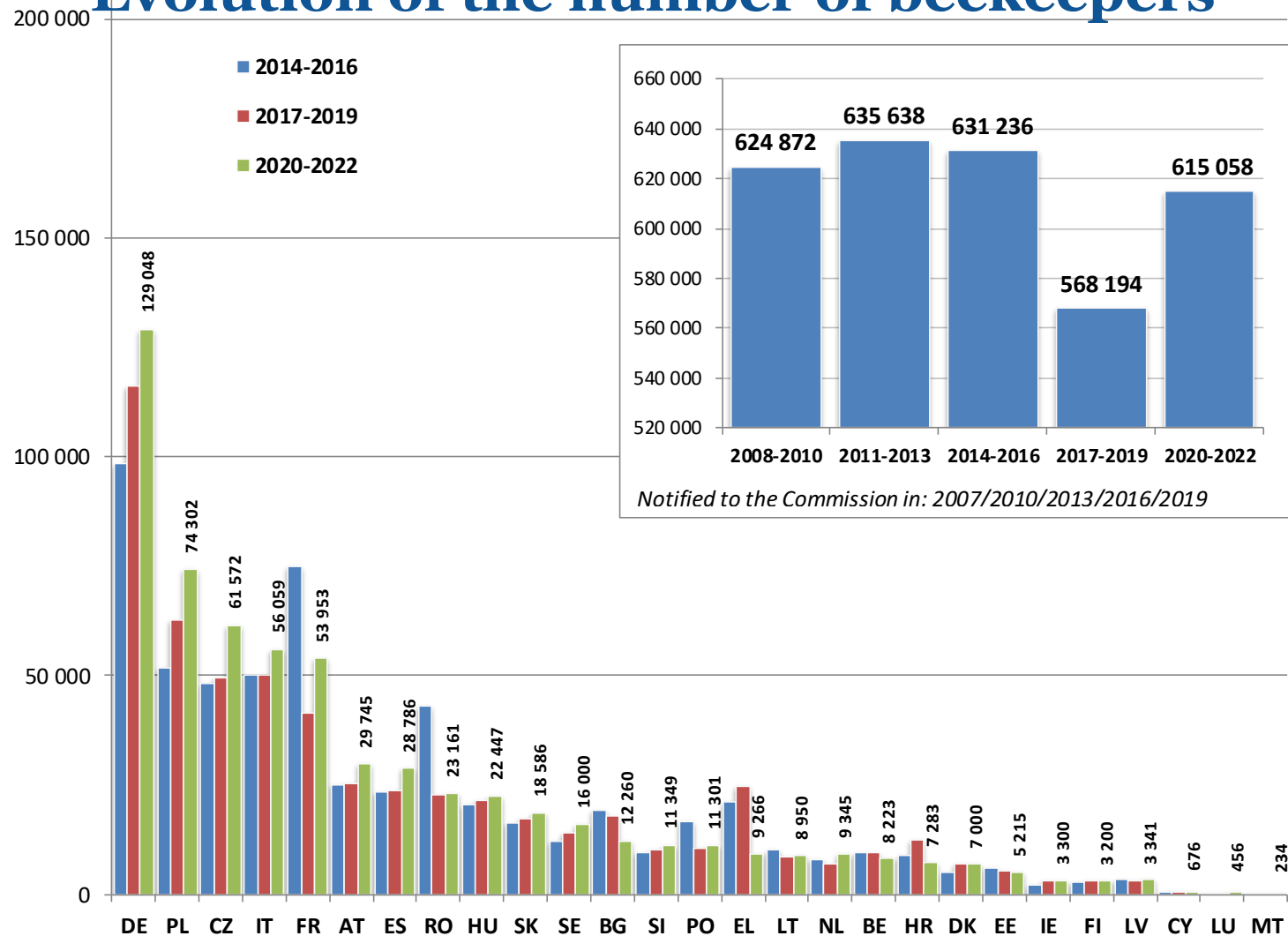
Source: MSs NAPs

# Number of beekeepers

Source: MSs NAPs

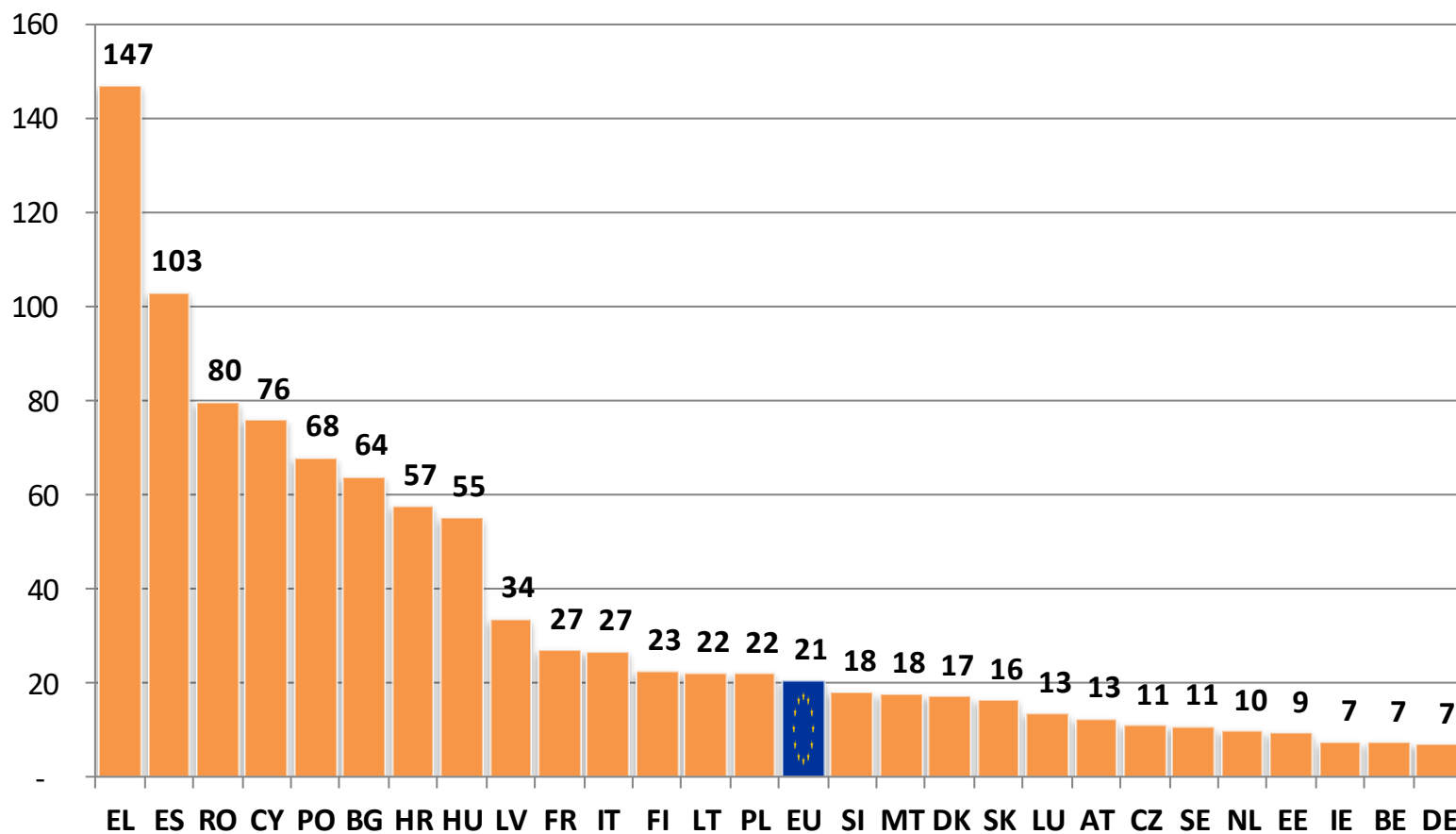


## Evolution of the number of beekeepers



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## Average Number of Hives per Beekeeper (2018)

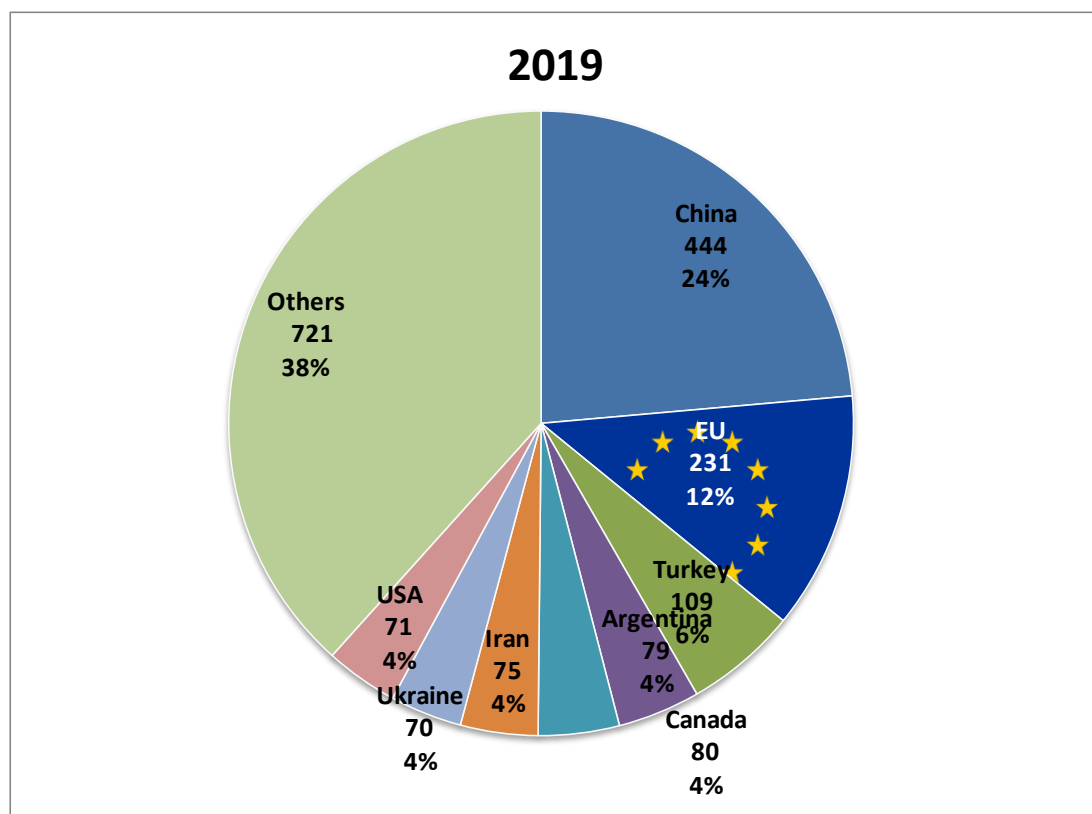


# World Production of Honey per Country (1 000 T)

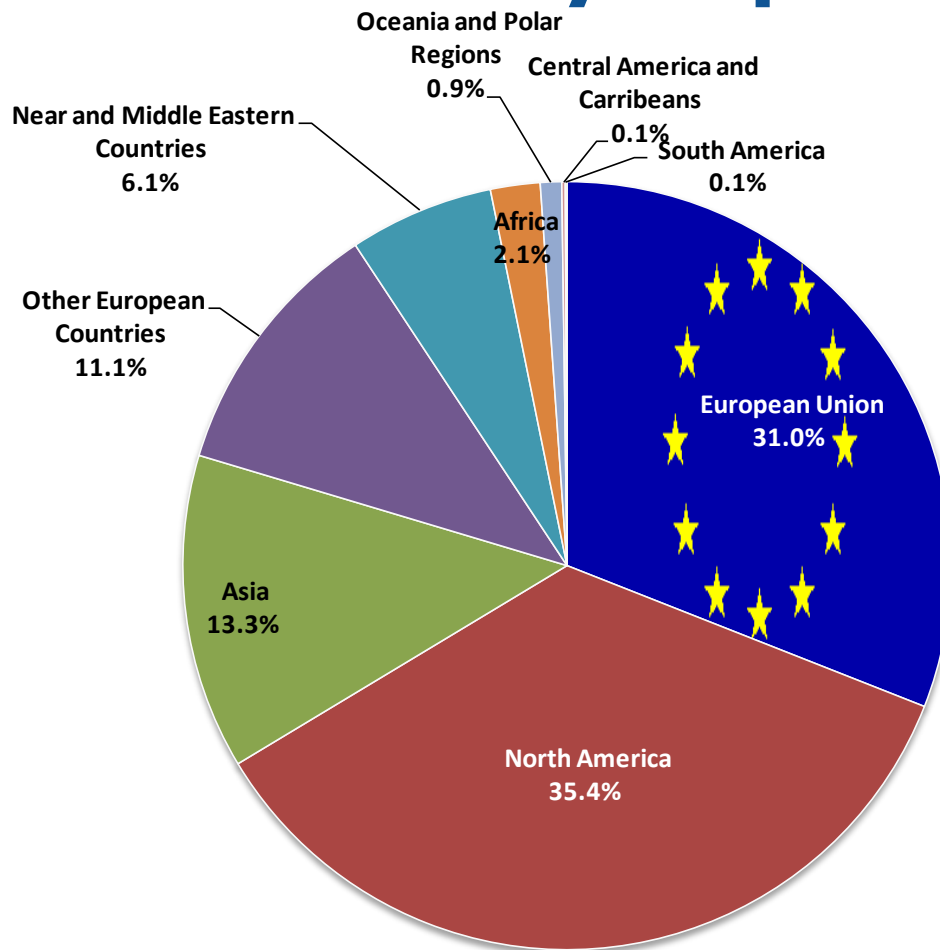
|                          | 2018  | 2019  | Share of World<br>Production |
|--------------------------|-------|-------|------------------------------|
| China                    | 447   | 444   | 24%                          |
| European Union           | 240   | 231   | 12%                          |
| Turkey                   | 108   | 109   | 6%                           |
| Canada                   | 95    | 80    | 4%                           |
| Argentina                | 79    | 79    | 4%                           |
| Iran                     | 76    | 75    | 4%                           |
| Ukraine                  | 71    | 70    | 4%                           |
| USA                      | 70    | 71    | 4%                           |
| India                    | 68    | 67    | 4%                           |
| Russian Federation       | 65    | 64    | 3%                           |
| Mexico                   | 64    | 62    | 3%                           |
| Ethiopia                 | 50    | 54    | 3%                           |
| Brazil                   | 42    | 46    | 2%                           |
| Tanzania                 | 31    | 31    | 2%                           |
| Republic of Korea        | 26    | 30    | 2%                           |
| Angola                   | 23    | 23    | 1%                           |
| Uruguay                  | 21    | 22    | 1%                           |
| Kenya                    | 21    | 14    | 1%                           |
| Viet Nam                 | 20    | 22    | 1%                           |
| New Zealand              | 20    | 23    | 1%                           |
| Central African Republic | 16    | 16    | 1%                           |
| Uzbekistan               | 13    | 13    | 1%                           |
| Chile                    | 12    | 12    | 1%                           |
| Other                    | 249   | 224   | 12%                          |
|                          | 1 926 | 1 882 |                              |

Source : FAO

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# The World's Honey importers (2019)

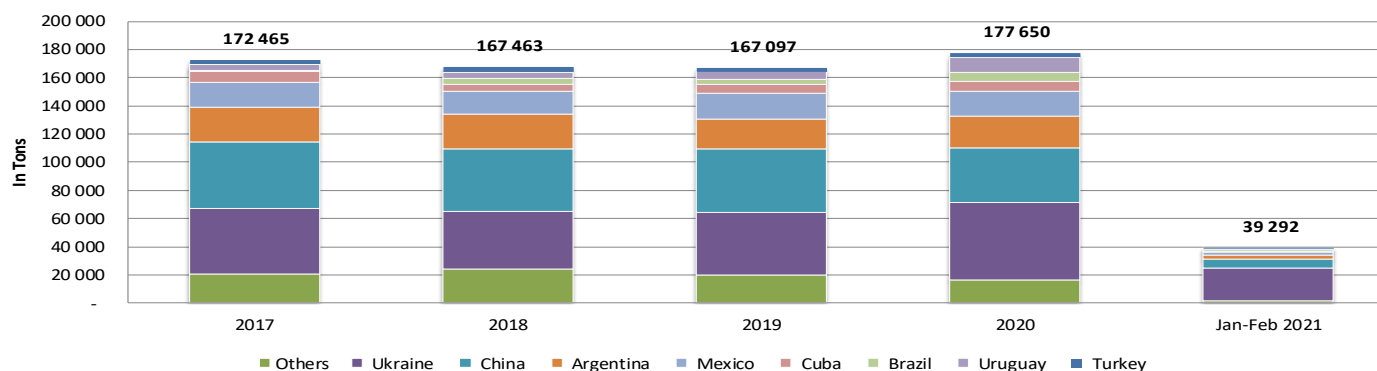


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Source : UN Comtrade

# EU Imports of Honey by Origin (in Tons)

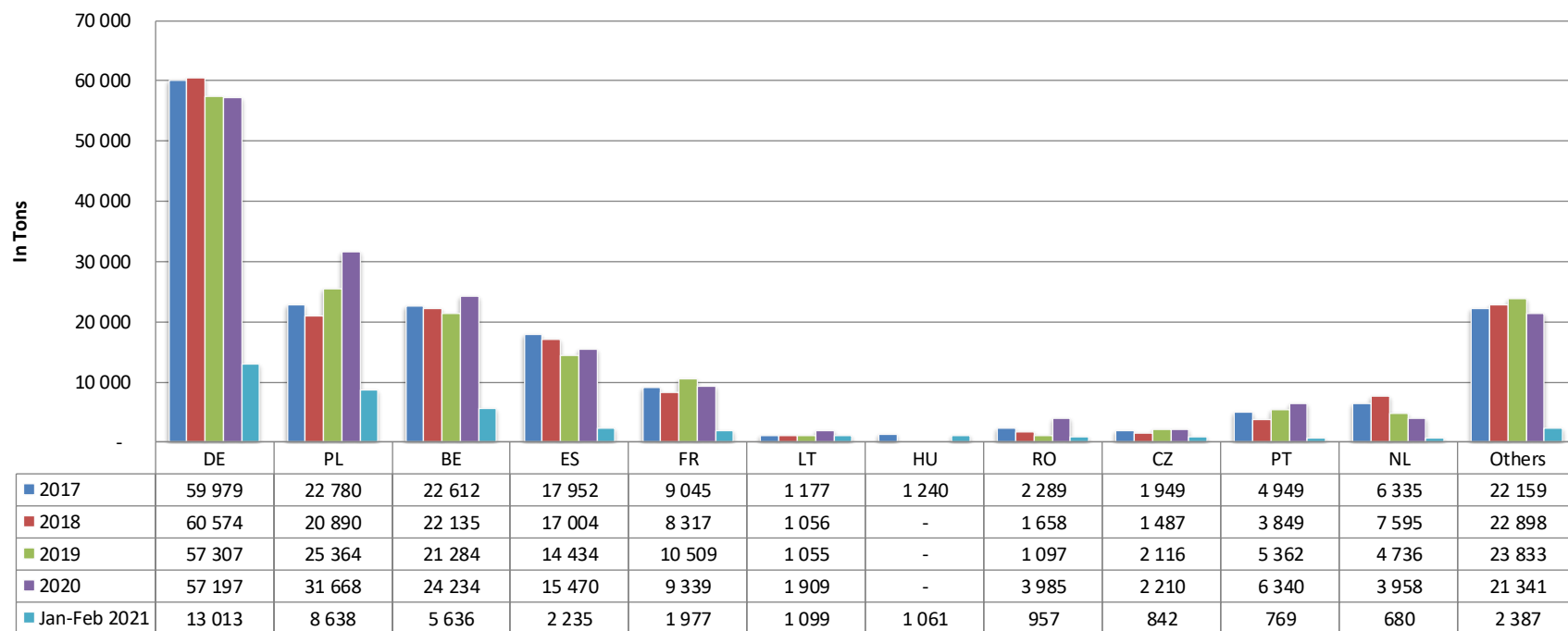
|           | 2018       |       | 2019       |       | 2020       |       | Jan-Feb 2021 |       | Compared to Jan-Feb |
|-----------|------------|-------|------------|-------|------------|-------|--------------|-------|---------------------|
|           | % Extra EU |       | % Extra EU |       | % Extra EU |       | % Extra EU   |       |                     |
| Ukraine   | 40 636     | 24.3% | 44 523     | 26.6% | 54 946     | 30.9% | 23 367       | 59.5% | ↑ +80.9%            |
| China     | 44 680     | 26.7% | 45 108     | 27.0% | 39 027     | 22.0% | 6 615        | 16.8% | ↑ +22.6%            |
| Argentina | 24 485     | 14.6% | 21 269     | 12.7% | 22 841     | 12.9% | 2 599        | 6.6%  | ↓ -25.3%            |
| Mexico    | 16 309     | 9.7%  | 18 205     | 10.9% | 17 476     | 9.8%  | 1 967        | 5.0%  | ↓ -38.8%            |
| Cuba      | 4 974      | 3.0%  | 6 477      | 3.9%  | 7 065      | 4.0%  | 1 069        | 2.7%  | ↓ -21.9%            |
| Brazil    | 4 201      | 2.5%  | 3 562      | 2.1%  | 6 259      | 3.5%  | 928          | 2.4%  | ↑ +53.2%            |
| Uruguay   | 4 423      | 2.6%  | 5 382      | 3.2%  | 10 623     | 6.0%  | 819          | 2.1%  | ↓ -15.1%            |
| Turkey    | 3 481      | 2.1%  | 2 977      | 1.8%  | 3 186      | 1.8%  | 518          | 1.3%  | ↓ -14.9%            |
| Others    | 24 274     | 14.5% | 19 594     | 11.7% | 16 228     | 9.1%  | 1 410        | 3.6%  | ↓ -37.4%            |
| Extra EU  | 167 463    |       | 167 097    |       | 177 650    |       | 39 292       |       | ↑ +27.6%            |
| % Change  | ↓ -2.9%    |       | ↓ -0.2%    |       | ↑ +6.3%    |       |              |       |                     |



Source : Eurostat Comext

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



Source : Eurostat Comext

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

|        | Jan-Feb 2020 |       | Jan-Feb 2021 |        | Compared to |           |
|--------|--------------|-------|--------------|--------|-------------|-----------|
|        | % Extra EU   |       | % Extra EU   |        | Jan-Feb 21  |           |
| DE     | 10 682       | 34.7% | <div></div>  | 13 013 | 42.2%       | ↑ +21.8%  |
| PL     | 3 514        | 11.4% | <div></div>  | 8 638  | 28.0%       | ↑ +145.8% |
| BE     | 3 496        | 11.3% | <div></div>  | 5 636  | 18.3%       | ↑ +61.2%  |
| ES     | 2 693        | 8.7%  | <div></div>  | 2 235  | 7.3%        | ↓ -17.0%  |
| FR     | 2 274        | 7.4%  | <div></div>  | 1 977  | 6.4%        | ↓ -13.1%  |
| LT     | 1 034        | 3.4%  | <div></div>  | 1 099  | 3.6%        | ↑ +6.2%   |
| HU     | -            | 0.0%  | <div></div>  | 1 061  | 3.4%        |           |
| RO     | 337          | 1.1%  | <div></div>  | 957    | 3.1%        | ↑ +184.1% |
| CZ     | 424          | 1.4%  | <div></div>  | 842    | 2.7%        | ↑ +98.7%  |
| PT     | 1 635        | 5.3%  | <div></div>  | 769    | 2.5%        | ↓ -53.0%  |
| NL     | 859          | 2.8%  | <div></div>  | 680    | 2.2%        | ↓ -20.8%  |
| Others | 3 853        | 12.5% | <div></div>  | 2 387  | 7.8%        | ↓ -38.1%  |
| EU     | 30 800       |       | <div></div>  | 39 292 |             | ↑ +27.6%  |

Source : Eurostat Comext

## Member States Imports of Honey from United Kingdom (in Tons)

|          | 2019    |       | 2020    |       | % change<br>19/18 | Jan-Feb 2020 |       | Jan-Feb 2021 |       | % change<br>Jan-Feb<br>2021/2020 |
|----------|---------|-------|---------|-------|-------------------|--------------|-------|--------------|-------|----------------------------------|
|          | % of EU |       | % of EU |       |                   | % of EU      |       | % of EU      |       |                                  |
| NL       | 384     | 8.0%  | 645     | 12.9% | ↑ +67.9%          | 47           | 7.1%  | 211          | 57.2% | ↑ +349.6%                        |
| IE       | 3 628   | 75.2% | 3 358   | 67.4% | ↓ -7.5%           | 501          | 76.0% | 153          | 41.4% | ↓ -69.5%                         |
| GR       | 2       | 0.0%  | 3       | 0.1%  | ↑ +25.0%          | 0            | 0.0%  | 4            | 0.9%  | ↑ +1650.0%                       |
| DE       | 95      | 2.0%  | 33      | 0.7%  | ↓ -65.7%          | 14           | 2.2%  | 1            | 0.3%  | ↓ -92.3%                         |
| DK       | 22      | 0.4%  | 0       | 0.0%  | ↓ -100.0%         | 0            | 0.0%  | 0            | 0.1%  |                                  |
| BE       | 8       | 0.2%  | 4       | 0.1%  | ↓ -54.5%          | 0            | 0.0%  | 0            | 0.0%  | ↓ -100.0%                        |
| LV       | 0       | 0.0%  | 0       | 0.0%  |                   | 0            | 0.0%  | 0            | 0.0%  |                                  |
| LT       | 0       | 0.0%  | 0       | 0.0%  |                   | 0            | 0.0%  | 0            | 0.0%  |                                  |
| Others   | 687     | 14.2% | 942     | 18.9% | ↑ +37.2%          | 97           | 14.7% | 0            | 0.0%  | ↓ -100.0%                        |
| Total EU | 4 825   |       | 4 983   |       | ↑ +3.3%           | 659          |       | 369          |       | ↓ -44.0%                         |

Source : Eurostat Comext

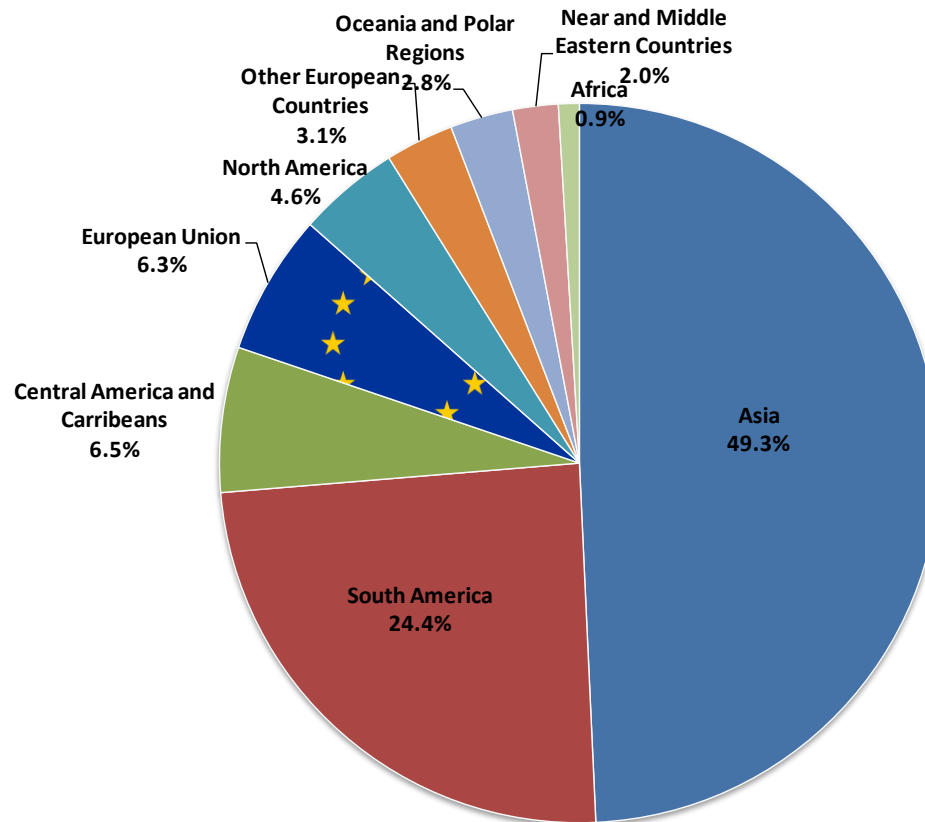
## EU Average Unit Value for Imported Honey (€/Kg) by Origin

|                     | 2017  | 2018  | 2019  | 2020  | 2021  | 2021/2020<br>% |
|---------------------|-------|-------|-------|-------|-------|----------------|
| Ukraine             | 1.74  | 1.83  | 1.68  | 1.53  | 1.61  | ↑ +5.2%        |
| China               | 1.63  | 1.51  | 1.40  | 1.37  | 1.27  | ↓ -7.3%        |
| Argentina           | 2.23  | 2.35  | 2.28  | 2.20  | 2.27  | ↑ +3.4%        |
| Mexico              | 2.83  | 2.89  | 2.56  | 2.22  | 2.18  | ↓ -1.6%        |
| Cuba                | 2.34  | 2.40  | 2.11  | 1.83  | 2.01  | ↑ +9.6%        |
| Brazil              | 3.84  | 3.38  | 2.67  | 2.16  | 2.32  | ↑ +7.0%        |
| Uruguay             | 2.35  | 2.25  | 1.99  | 1.78  | 1.79  | ↑ +0.8%        |
| Turkey              | 3.75  | 3.87  | 3.46  | 3.33  | 3.19  | ↓ -4.2%        |
| United Kingdom      | 4.88  | 4.73  | 4.28  | 4.27  | 2.79  | ↓ -34.7%       |
| Serbia              | 3.06  | 3.74  | 3.51  | 5.28  | 7.00  | ↑ +32.5%       |
| Moldova             | 2.49  | 2.47  | 2.69  | 2.28  | 2.48  | ↑ +8.8%        |
| New Zealand         | 27.45 | 30.70 | 28.52 | 29.04 | 23.52 | ↓ -19.0%       |
| Chile               | 2.89  | 2.96  | 2.71  | 2.72  | 3.03  | ↑ +11.3%       |
| India               | 2.18  | 1.65  | 1.66  | 1.70  | 1.69  | ↓ -0.6%        |
| Russia              | 1.36  | 1.92  | 2.21  | 2.11  | 2.08  | ↓ -1.4%        |
| Extra EU            | 2.24  | 2.33  | 2.13  | 2.05  | 1.84  | ↓ -10.2%       |
| Extra EU (excl. NZ) | 2.13  | 2.23  | 2.02  | 1.89  | 1.75  | ↓ -7.3%        |

Source : Eurostat Comext

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# The World's Honey exporters (2019)

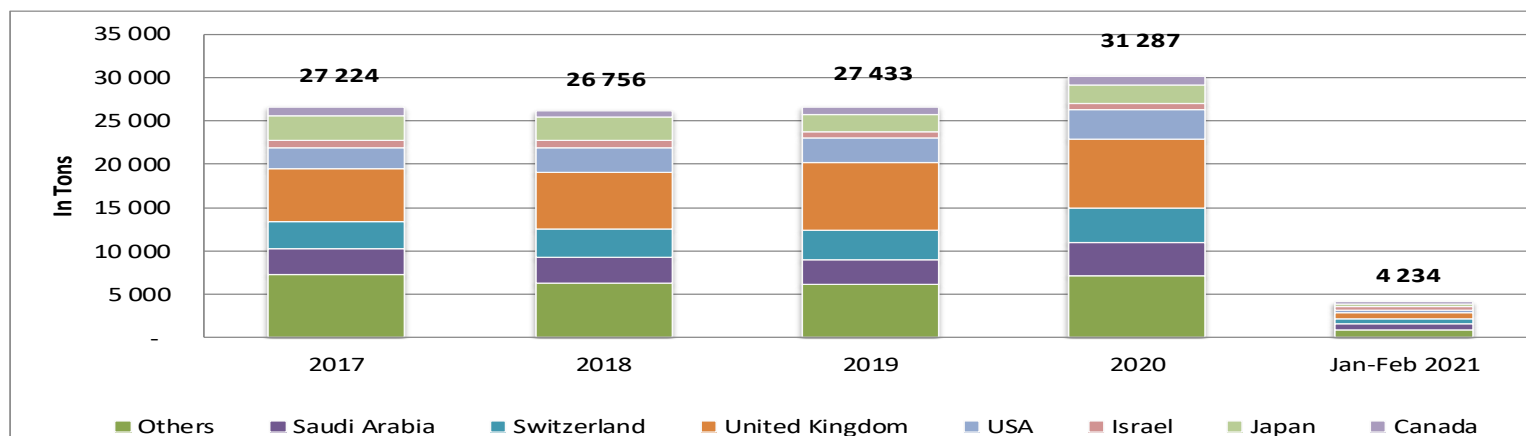


Source :UN Comtrade

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# EU Exports of Honey by Destinations

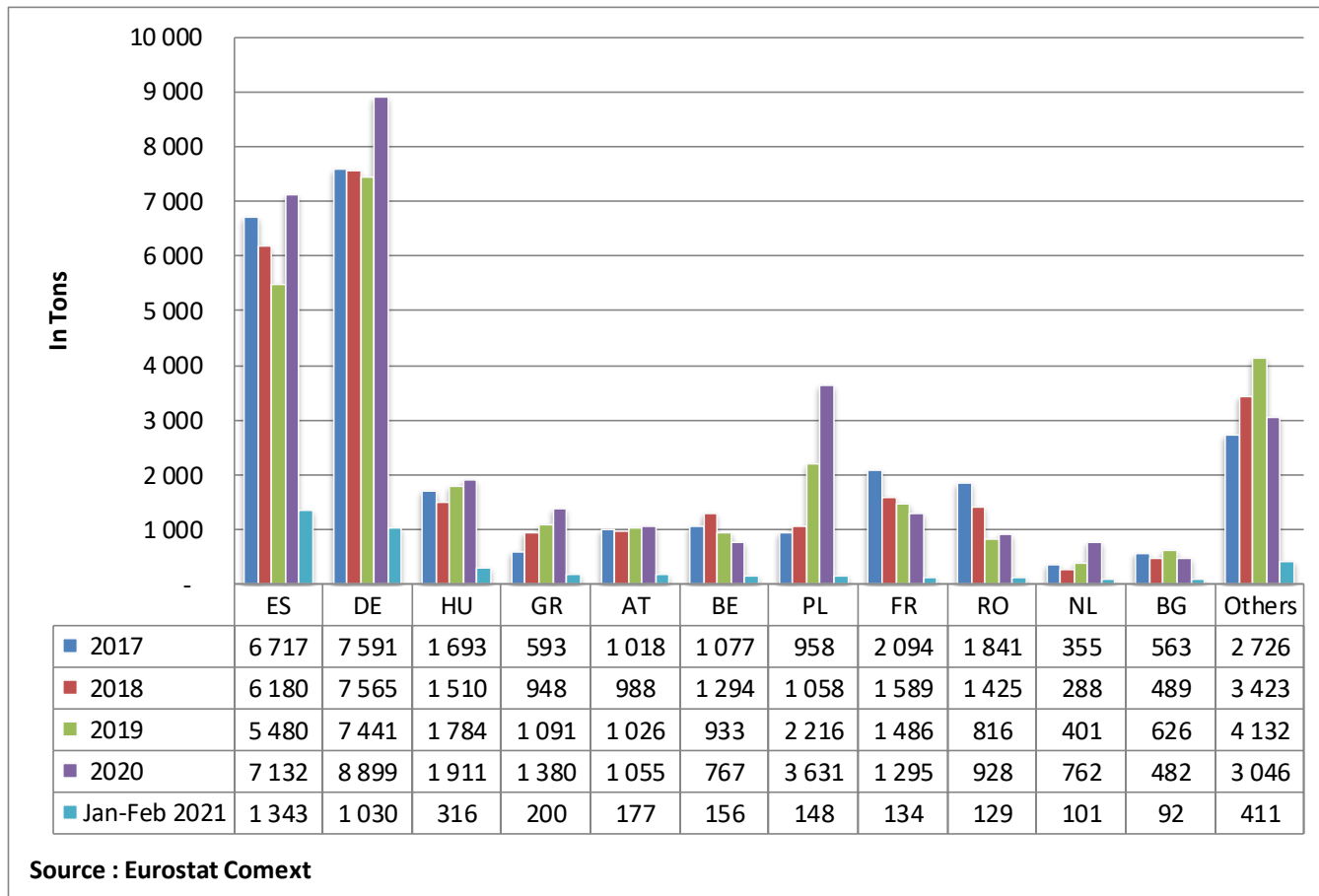
|                | 2018       |       | 2019       |       | 2020       |       | Jan-Feb 2021 |       | Compared to Jan-Feb |
|----------------|------------|-------|------------|-------|------------|-------|--------------|-------|---------------------|
|                | % Extra EU |       | % Extra EU |       | % Extra EU |       | % Extra EU   |       |                     |
| Saudi Arabia   | 2 956      | 11.0% | 2 815      | 10.3% | 3 817      | 12.2% | 706          | 16.7% | ↑ +91.1%            |
| Switzerland    | 3 348      | 12.5% | 3 438      | 12.5% | 4 034      | 12.9% | 623          | 14.7% | ↓ -8.5%             |
| United Kingdom | 6 521      | 24.4% | 7 833      | 28.6% | 7 859      | 25.1% | 599          | 14.1% | ↓ -52.3%            |
| USA            | 2 889      | 10.8% | 2 825      | 10.3% | 3 408      | 10.9% | 384          | 9.1%  | ↓ -0.8%             |
| Israel         | 790        | 3.0%  | 620        | 2.3%  | 680        | 2.2%  | 364          | 8.6%  | ↑ +34.7%            |
| Japan          | 2 712      | 10.1% | 1 992      | 7.3%  | 2 154      | 6.9%  | 295          | 7.0%  | ↑ +26.4%            |
| Canada         | 748        | 2.8%  | 969        | 3.5%  | 984        | 3.1%  | 240          | 5.7%  | ↑ +83.0%            |
| U.A.Emirates   | 561        | 2.1%  | 815        | 3.0%  | 1 201      | 3.8%  | 130          | 3.1%  | ↓ -63.1%            |
| Others         | 6 231      | 23.3% | 6 127      | 22.3% | 7 150      | 22.9% | 894          | 21.1% | ↓ -3.2%             |
| Extra EU       | 26 756     |       | 27 433     |       | 31 287     |       | 4 234        |       | ↓ -8.0%             |
| % Change       | ↓ -1.7%    |       | ↑ +2.5%    |       | ↑ +14.0%   |       |              |       |                     |



Source : Eurostat Comext

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## Member States Share of Export to Third Countries



## Member States Share of Export to Third Countries

|        | Jan-Feb 2020<br><i>% Extra EU</i> |       | Jan-Feb 2021<br><i>% Extra EU</i>                                                          |       | Compared to<br>Jan-Feb 20                                                             |        |
|--------|-----------------------------------|-------|--------------------------------------------------------------------------------------------|-------|---------------------------------------------------------------------------------------|--------|
| ES     | 997                               | 21.7% |  1 343    | 29.2% |    | +34.6% |
| DE     | 1 234                             | 26.8% |  1 030    | 22.4% |    | -16.6% |
| HU     | 384                               | 8.3%  |  316      | 6.9%  |    | -17.7% |
| GR     | 224                               | 4.9%  |  200      | 4.3%  |    | -11.0% |
| AT     | 195                               | 4.2%  |  177      | 3.8%  |    | -9.0%  |
| BE     | 87                                | 1.9%  |  156      | 3.4%  |    | +79.1% |
| PL     | 609                               | 13.2% |  148      | 3.2%  |    | -75.8% |
| FR     | 214                               | 4.6%  |  134      | 2.9%  |    | -37.3% |
| RO     | 124                               | 2.7%  |  129      | 2.8%  |    | +3.7%  |
| NL     | 52                                | 1.1%  |  101     | 2.2%  |   | +93.1% |
| BG     | 66                                | 1.4%  |  92     | 2.0%  |  | +39.0% |
| Others | 1 414                             | 30.7% |  411    | 8.9%  |  | -71.0% |
| EU     | 4 603                             |       |  4 234 |       |  | -8.0%  |

## Member States Exports of Honey to United Kingdom (in tons)

|          | 2019    |       | 2020    |       | % change<br>19/18 | Jan-Feb 2020 |       | Jan-Feb 2021 |       | % change<br>Jan-Feb<br>21/20 |
|----------|---------|-------|---------|-------|-------------------|--------------|-------|--------------|-------|------------------------------|
|          | % of EU |       | % of EU |       |                   | % of EU      |       | % of EU      |       |                              |
| PL       | 2 058   | 26.3% | 2 803   | 35.7% | ↑ +36.2%          | 550          | 43.8% | 118          | 19.6% | ↓ -78.6%                     |
| BE       | 670     | 8.6%  | 469     | 6.0%  | ↓ -30.0%          | 58           | 4.6%  | 95           | 15.8% | ↑ +63.8%                     |
| DE       | 970     | 12.4% | 1 234   | 15.7% | ↑ +27.3%          | 133          | 10.6% | 62           | 10.4% | ↓ -53.1%                     |
| RO       | 368     | 4.7%  | 437     | 5.6%  | ↑ +18.8%          | 61           | 4.9%  | 59           | 9.9%  | ↓ -3.3%                      |
| IE       | 1 448   | 18.5% | 646     | 8.2%  | ↓ -55.4%          | 85           | 6.8%  | 53           | 8.8%  | ↓ -37.9%                     |
| ES       | 890     | 11.4% | 1 030   | 13.1% | ↑ +15.7%          | 139          | 11.0% | 52           | 8.6%  | ↓ -62.8%                     |
| HU       | 198     | 2.5%  | 123     | 1.6%  | ↓ -38.3%          | 6            | 0.5%  | 47           | 7.9%  | ↑ +686.7%                    |
| GR       | 282     | 3.6%  | 273     | 3.5%  | ↓ -3.2%           | 74           | 5.9%  | 41           | 6.8%  | ↓ -44.4%                     |
| Others   | 949     | 12.1% | 845     | 10.8% | ↓ -10.9%          | 151          | 12.0% | 73           | 12.1% | ↓ -52.0%                     |
| Total EU | 7 833   |       | 7 859   |       | ↑ +0.3%           | 1 256        |       | 599          |       | ↓ -52.3%                     |

Source : Eurostat Comext

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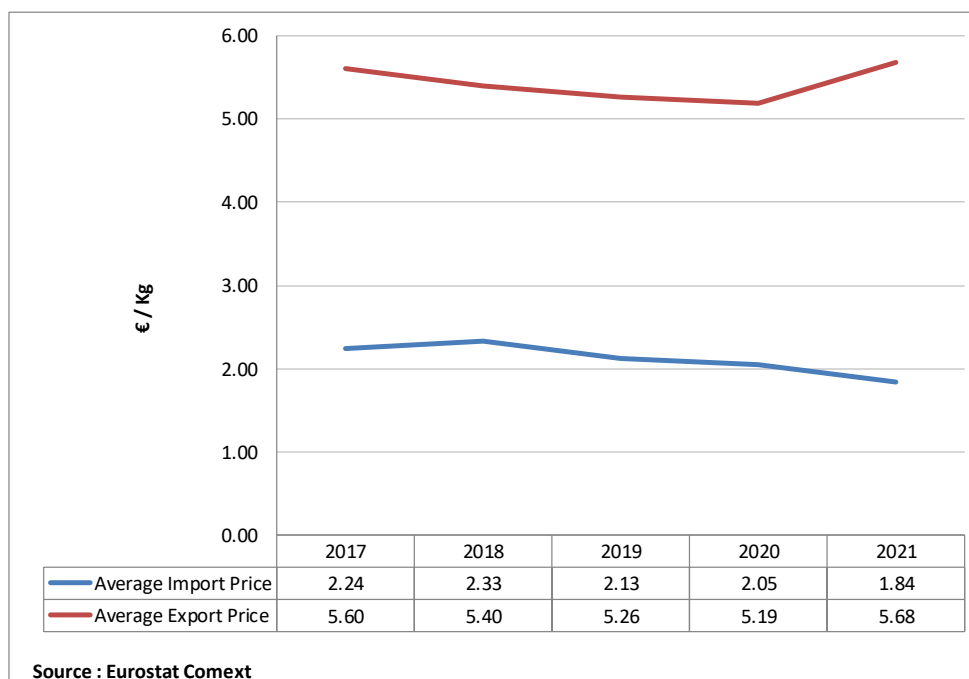
## EU Average Unit Value for Exported Honey (€/kg) by Destination

|                 | 2017        | 2018        | 2019        | 2020        | 2021        | 2021/2020<br>% |
|-----------------|-------------|-------------|-------------|-------------|-------------|----------------|
| Saudi Arabia    | 7.83        | 6.88        | 7.53        | 6.43        | 6.58        | ↑ +2.3%        |
| Switzerland     | 5.56        | 5.53        | 5.41        | 5.68        | 6.18        | ↑ +8.9%        |
| United Kingdom  | 5.05        | 4.83        | 3.98        | 3.64        | 4.62        | ↑ +26.7%       |
| USA             | 6.30        | 5.89        | 6.29        | 5.77        | 6.64        | ↑ +15.1%       |
| Israel          | 2.97        | 2.96        | 2.84        | 2.82        | 2.79        | ↓ -0.9%        |
| Japan           | 5.50        | 5.22        | 5.75        | 6.53        | 7.29        | ↑ +11.5%       |
| Canada          | 3.74        | 4.15        | 3.89        | 3.86        | 3.32        | ↓ -14.0%       |
| U.A.Emirates    | 7.60        | 7.65        | 7.51        | 7.72        | 7.75        | ↑ +0.4%        |
| Norway          | 5.04        | 5.99        | 5.39        | 5.27        | 6.02        | ↑ +14.3%       |
| Morocco         | 1.98        | 1.97        | 2.80        | 2.57        | 2.82        | ↑ +9.7%        |
| Jordan          | 4.82        | 5.04        | 4.85        | 4.79        | 5.75        | ↑ +19.9%       |
| Hong Kong       | 6.39        | 6.98        | 6.99        | 6.79        | 6.66        | ↓ -2.0%        |
| Bosnia-Herz.    | 4.08        | 4.53        | 4.78        | 4.58        | 4.11        | ↓ -10.3%       |
| China           | 5.73        | 6.02        | 7.44        | 6.33        | 6.66        | ↑ +5.3%        |
| Algeria         | 5.46        | 3.25        | 3.14        | 3.85        | 3.88        | ↑ +0.9%        |
| <b>Extra EU</b> | <b>5.60</b> | <b>5.40</b> | <b>5.26</b> | <b>5.19</b> | <b>5.68</b> | ↑ +9.5%        |

Source : Eurostat Comext

20 May 2021

# 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)