

## What is the demand for honey in Europe?

After several years of increasing international honey prices, prices dropped sharply in the second half of 2015. The balance between supply and demand has shifted, and exporters will need to adapt their prices to this new market equilibrium. In terms of volumes, European demand for honey remains strong and importers continue to look for new suppliers.

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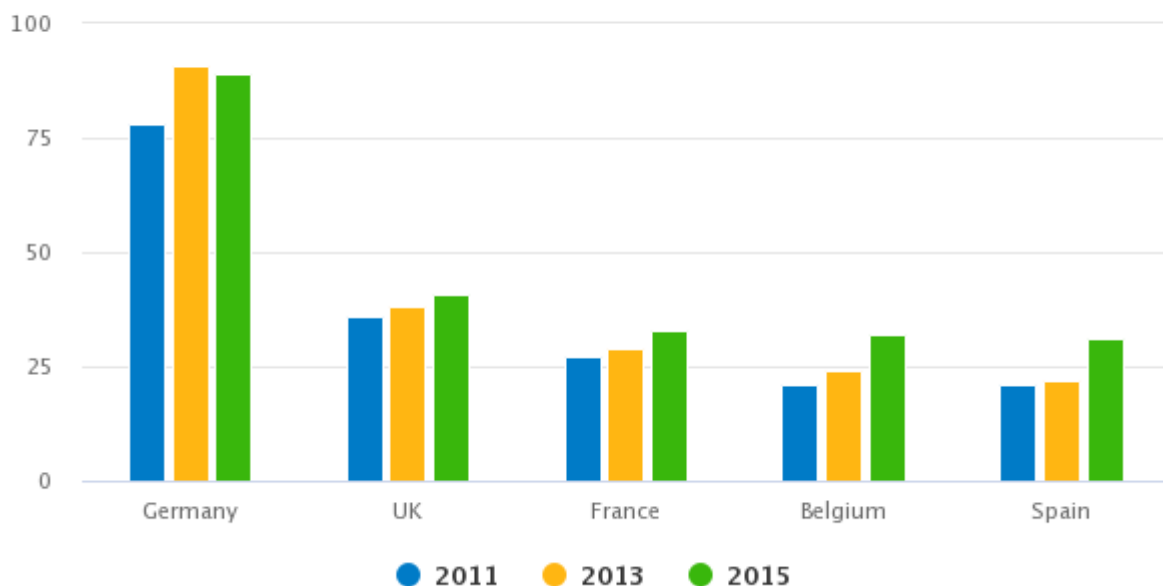
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## 1. How much honey is imported into Europe?

### European imports rising in volume

Europe is the second largest global producer of honey. However, it is not self-sufficient and is dependent on honey imports from other countries. In fact, around 40% of Europe's consumption needs are met through honey imports.

Figure 1: Leading European importers of natural honey  
in 1,000 tonnes



Source: Eurostat (2016)

European imports of honey increased considerably between 2011 and 2015, amounting to more than 339,000 tonnes in 2015.

The continuous increase of European honey imports is mostly attributed to the substantial decrease of the European beekeeping sector, but is also the result of various problems related to major honey sources in previous years, such as droughts.

Germany is the largest honey importer, representing a share of 26% of the total volume of European imports,

amounting to more than 88,000 tonnes in 2015.

The UK (12% of total imports), France (10%), Belgium (10%) and Spain (9%) are the other main European importers. Honey importers in these countries process the honey and sell it both domestically and abroad.

In the next five years, honey imports are expected to increase further in order to compensate for the continuous decline of the European production.

### Tip:

See our study about [trends for honey](#) for more information.

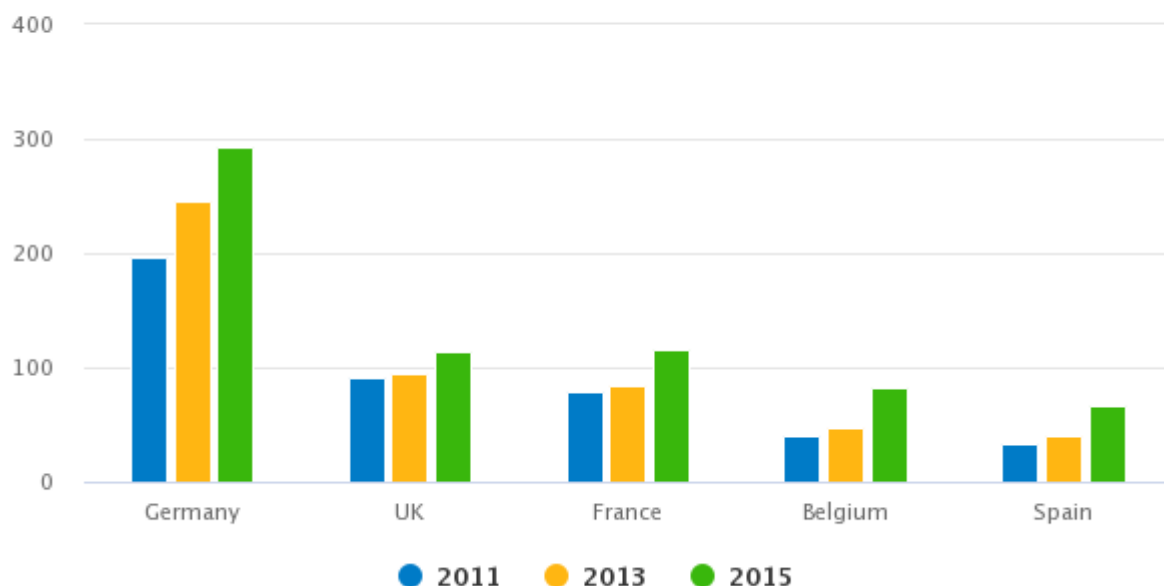
## European imports significantly increased in value

Between 2010 and 2015 the honey prices on the international market saw a continuous rise, with prices for Mexican and Argentinean honey reaching USD 3,400/tonne FOB and sometimes even up to USD 4,000/tonne. As a result, the overall European imports increased by 11% in value.

The two main European importers of honey – Germany and the United Kingdom – experienced a significant increase in value of 11% and 6% respectively. Countries with an even higher increase of imports in value include Hungary (+88%), Croatia (+66%) and Bulgaria (+44%).

Figure 2: European imports of natural honey

in ? 1,000,000



Source: Eurostat (2016)

Since the end of 2015, international honey prices have been dropping considerably to levels below USD 2,500/tonne FOB for Mexican and Argentinean honey.

This decrease is caused by a combination of an increased supply from traditional honey producers, good harvests worldwide and strong stock positions, which have resulted in a balance shift between demand and supply.

As a result of the decreasing prices, honey stocks in South America became quite high as importers stopped buying in anticipation of further price drops and an increase of supply options.

### **Tips:**

Anticipate lower price offers from buyers in 2016 than in previous years.

Work on price and cost reduction in the supply chain to remain price competitive in the new market situation with lower global market prices.

Diversify your customer base to prevent dependence on a small number of buyers or just one market.

### **Interesting European markets**

The markets of Germany, the UK and France account for around 50% of total European honey imports. Germany is the leading market, absorbing 26% of total imports.

It is interesting to note that imports are also increasingly directed to countries in Central and Eastern Europe. This development is mostly attributed to the shift of Ukrainian honey exports from Russia to the European Union. In fact, due to recent developments in relations between Ukraine and Russia, the European Union quadrupled imports of Ukrainian honey between 2011 and 2015.

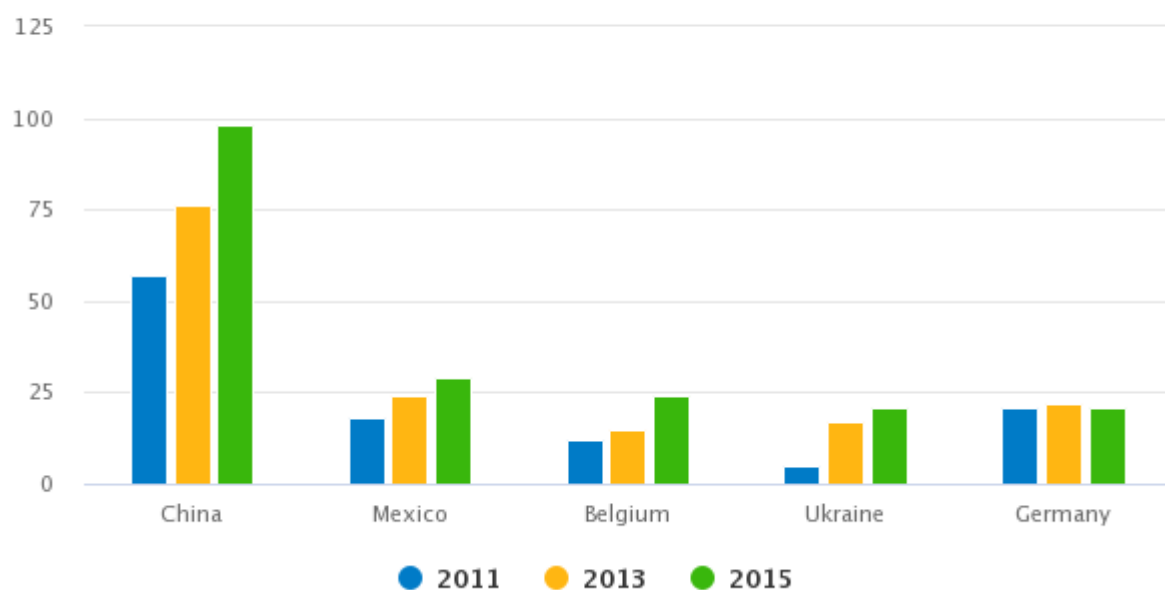
To strengthen trade relations with Ukraine, the European Union currently allows importers to source 5,000 tonnes of honey on a duty-free basis. Because of geographical proximity, Ukrainian exports are largely directed to countries such as Poland, Romania and Bulgaria.

### **Tip:**

Honey markets in Eastern European countries (such as Poland and Romania) are small but rapidly growing, offering opportunities to developing country exporters. However, markets in such countries are subject to harsh competition from informal markets and supplies from Ukraine.

Figure 3: Main suppliers of natural honey to the EU

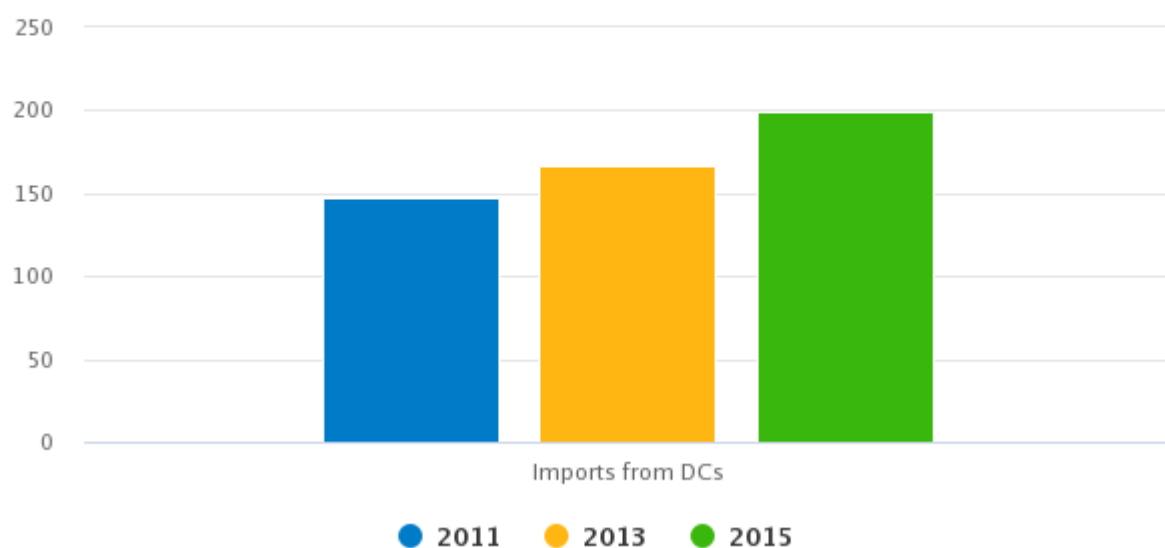
in 1,000 tonnes



Source: Eurostat (2016)

Figure 4: European imports of natural honey from developing countries

in 1,000 tonnes



Source: Eurostat (2016)

### Opportunities for new suppliers

Honey imports from developing countries increased significantly between 2011 and 2015, amounting to 199,000 tonnes (€ 466 million) and representing 59% of total honey imports directed to Europe.

The largest supplier of honey to the European market is China, with imports amounting to more than 98,000 tonnes. Imports from China represent 29% of total honey imports directed to Europe. Chinese honey supplies are stable and sufficient, while the prices for honey are low because of low labour costs.

Despite some quality issues with Chinese honey (mostly concerning residues), China remains the largest supplier of honey to Europe.

Other large developing country suppliers include Mexico (7% share), Argentina (3%) and Brazil (2%).

It is important to note that until recently, Argentina was at the forefront of supplying honey to Europe and until 2010 was the second largest supplier of honey to Europe. However, bad climate conditions and GMO pollen in Argentinian honey have caused a decline in Argentinian supplies to Europe.

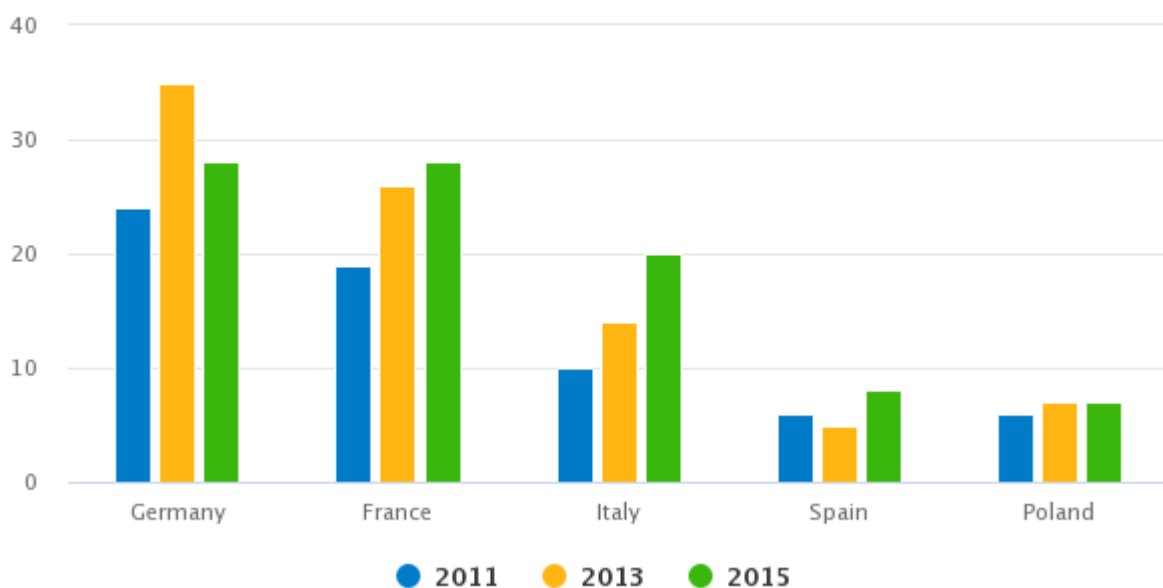
### Tip:

If you can provide GMO-free honey, take advantage of the low availability of honey with a GMO-free certificate from Argentina. Buyers who previously sourced in Argentina are generally looking for consistent quantities and competitive prices.

## 2. How much honey is exported from Europe?

Figure 5: Major destinations of EU natural honey exports

in 1,000 tonnes



Source: Eurostat (2016)

### Continuous increase of European exports

During the period between 2011 and 2015, European honey exports increased substantially (8.5% annual increase), amounting to more than 162,000 tonnes in 2015.

The main destinations for European honey exports are other mature European markets, mainly in Western Europe. More specifically, the most important export destination for 2015 was Germany, absorbing 18% of the total European honey exports.

The second largest destination is France, with a market share of 17%. France re-exports a large share of its

honey imports while consuming honey that is domestically produced.

Other major destinations for the European honey exports are Italy, Spain and Poland. An interesting trend is the gradual shift of the exports towards countries in Eastern Europe. In fact, between 2011 and 2015 there was a substantial increase in the honey volume absorbed by Eastern European countries such as Romania (19% annual increase), Bulgaria (35%) and Hungary (66%).

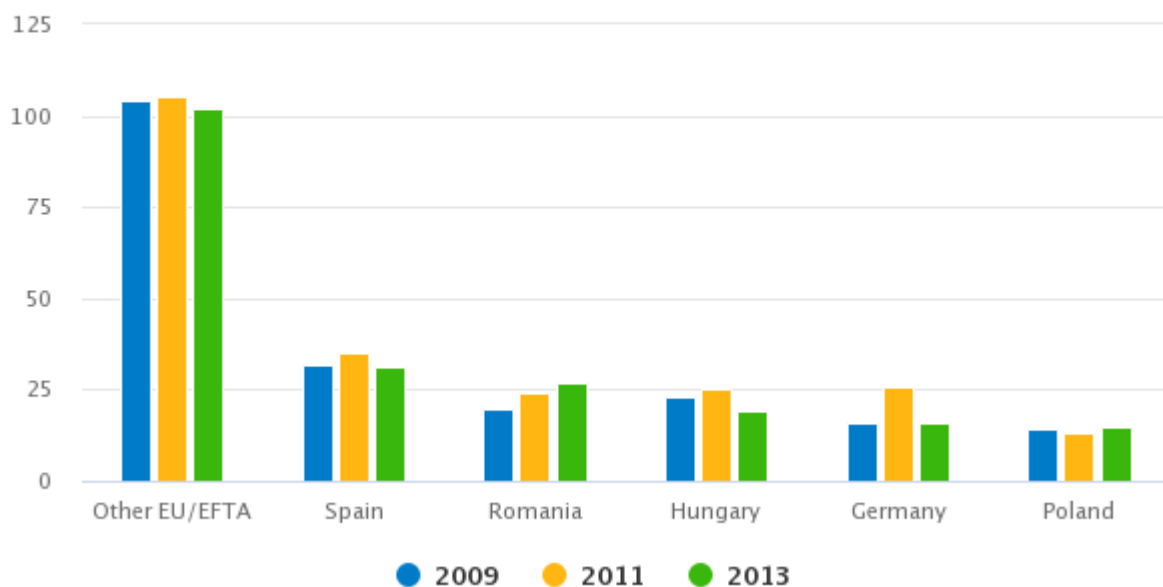
### Tip:

Germany and France are honey trade hubs. Consequently, you will find most big honey importers and processors in these countries. Please refer to the website of [FEEDM \(European Federation of Honey Packers & Distributors\)](#) where you can look for national beekeepers associations for these countries and search for potential buyers.

## 3. How much honey is produced in Europe?

Production data for the European Member States were extracted from FAOSTAT. Since data is not available for 2014 or 2015, the data extraction and the analysis is based on data from the years 2009, 2011 and 2013.

Figure 6: Major EU producers of natural honey  
in 1,000 tonnes



Source: FAOSTAT (2016)

### Decreasing beekeeping sector

In the last few years, Europe has produced around 234,000 tons of honey per year (Source: European Commission, 2016). Between 2009 and 2013 European honey production fluctuated somewhat, resulting in an almost equal production in 2013 as in 2009, amounting to 209,000 tonnes.

The decline in European production between 2011 and 2013 was mainly attributed to production decreases in Germany and Spain. However, production in other major European honey sources such as Romania, Hungary

and Poland was also under pressure.

The decrease in European production was mostly attributed to the decrease in bee colonies, which was largely the result of bee diseases and intensive use of chemicals in agriculture that are deadly for bees.

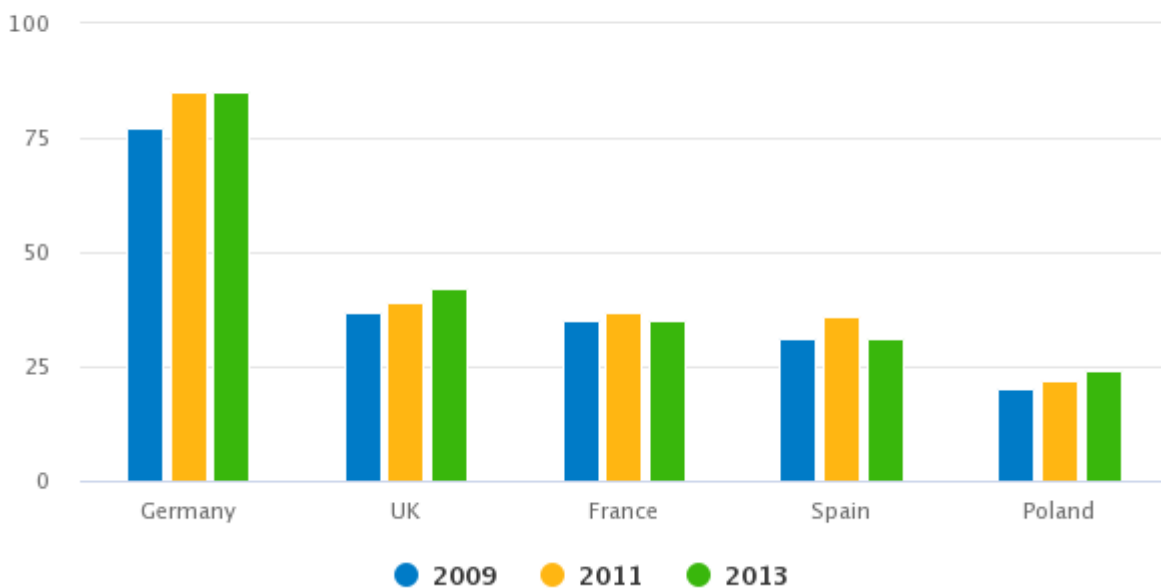
Since 2013, the amount of colonies has been stabilising. However, the threat of declining populations of bees is still a major concern as intensification of agriculture and use of pesticides continues. See our study on [trends for honey](#) for more information.

**Tip:**

The pressure on European honey production means that more opportunities will emerge for developing country exporters. Being able to guarantee a consistent quantity of honey will be essential for cooperation with European honey buyers.

## 4. How much honey is consumed in Europe?

Figure 6: Major European consumers of natural honey  
in tonnes



Source: Eurostat (2016), FAOSTAT (2016)

Apparent consumption was calculated using the formula:  $apparent\ consumption = production + imports - exports$ . Production data were extracted from FAOSTAT for the period 2009-2013. Import and export data were extracted from Eurostat for the period 2009-2013.

### Stabilisation of honey consumption

Europe is the largest global consumer of honey, being responsible for more than 20% of the total global consumption. China, the US and Turkey are the other major global honey consumers.

Between 2009 and 2013, consumption remained stable despite increasing prices on the global market. Apparent consumption only fluctuated slightly, amounting to almost 362,000 tonnes in 2013. After an increase

in consumption between 2009 and 2011, European honey consumption decreased slightly between 2011 and 2013.

Germany is the leading market for honey, representing 23% of total European honey consumption (around 85,000 tonnes). Other major consumers of honey in Europe are the UK (12% of total European consumption), France (10%), Spain (8%) and Poland (7%)

According to figures on growth rates of apparent consumption, the fastest growing consumption markets in the period 2009-2013 were Ireland (+26% annually), Latvia (+22% annually), Romania (+15% annually), Croatia (+14% annually), Estonia (+11% annually) and Malta (+11% annually).

### **Tips:**

Honey markets in Western Europe are the largest, and honey consumption is expected to remain high. These markets also offer the most opportunities for developing country exporters of niche honeys such as monofloral, organic and Fairtrade. See our study on [trends for honey](#) for more information.

Target your promotional efforts at the fast-growing Central and Eastern European markets as well. These markets offer more room for new suppliers and thus great opportunities for developing country exporters.