

Which trends offer opportunities on the European honey market?

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European consumers prefer low-calorie, natural and healthy sweeteners. They are focusing more on healthy alternatives to refined sugar, such as raw cane sugar, honey and palm sugar. They are also paying more attention to food safety issues and sustainable trade.

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1. Demand for low-calorie products

Sugar replacement offers many opportunities for suppliers of low-calorie sweeteners such as stevia, aspartame and sucralose. Food manufacturers can use these high-intensity sweeteners to maintain the sweetness of their products. They also use them to label their products as 'light' or 'with less sugar' and position them as healthier products than the original product.

European consumers are increasingly concerned about their health. In particular, obesity is one of the main health issues. As a result, consumers are trying to avoid products and ingredients with a high calorie level, such as refined white sugar.

According to projections by the European Union, sugar consumption in the European Union will decrease by about 5% in the next decade.

The decrease in sugar consumption will be stimulated by European governments that are also increasingly concerned about widespread obesity problems due to high calorie intake.

Governments of several countries have imposed a '[sugar tax](#)' (excise duties) on various products containing sugar, such as confectionery, ice cream and soft drinks. However, Denmark and Finland abandoned their sugar and fat tax due to negative economic and political side effects.

The United Kingdom will introduce [a sugar tax in 2018](#). Furthermore, the European Union has developed policies

to [ban sugar in fruit juices](#).

In line with this trend, food manufacturers are reducing the level of sugar in certain products. They often lower the sugar content of their products in small steps of around 30% and replace it with alternative low-calorie sweeteners.

This step-wise approach to sugar reduction limits the effect on taste of the products, as consumers can slowly adapt to the new tastes.

Tips:

- If you offer a low-calorie sweetener, provide information on the use of your sweetener for sugar replacement.
- Keep up-to-date about the latest European regulations and public campaigns within the sugar debate to anticipate changes in demand for alternative sweeteners. Useful sources include [European Parliament News](#) and [FoodNavigator](#).

2. Consumers prefer natural sweeteners

In addition to the reduction of sugar intake, consumer concerns about artificial sweeteners are also gaining substantial importance.

Artificial sweeteners are chemically synthesised and do not appear in nature. Examples include aspartame, sucralose and acesulfame K.

Due to multiple stories about the potentially negative health effects of artificial sweeteners, consumer demand for products without artificial ingredients has increased.

Consumers are looking for products with natural sweeteners instead. These are extracted from plants and have been processed with techniques which are considered to be close to nature, such as heating, distillation and filtering.

The exact definition of natural is still a subject of debate. Examples of natural sweeteners include palm sugar, stevia, yacon and lucuma. See our studies about [palm sugar](#), [yacon](#) and [lucuma](#) for more market information.

Tips:

- Promote the natural features of your product. Show the natural origin and explain the production process to clarify your definition of the term 'natural'.
- For more [information on use of the term 'natural'](#) on product labels, refer to this article by [Beveragedaily.com](#).

3. High interest in potential health benefit

In line with demand for low-calorie products and natural sweeteners, consumers are also interested in products with potential health benefits.

Examples of sweeteners with such perceived health benefits include raw sugars, which contain more nutrients

than refined white sugar.

Diabetic consumers also show interest in sweeteners with a low Glycaemic Index, such as coconut palm sugar.

Although several sweeteners, including honey, often have a traditional use as a medicinal or therapeutic product, their potential health benefits cannot be promoted in Europe. This requires scientific evidence for authorisation by European Union authorities, which is generally not available.

Tip:

- Promote the health properties of your product, but only claim health benefits which are backed up by scientific evidence. Access the European Union Register database for all [nutrition and health claims allowed in Europe](#).

4. Innovative use of honey and sweeteners

Many European consumers are interested in innovative products with new flavours. The food industry is constantly looking for new and alternative sweeteners that can be used in food products.

European consumers are particularly interested in new sweeteners which are low in calories, natural and healthy. One example is lucuma, a caramel-flavoured fruit from Peru that can be used in ice cream and other snacks. It is increasingly used by companies for its taste as well as its natural and vitamin-rich properties.

About 25% of the honey consumed in Europe is used as an ingredient in food products. Although honey is not an innovative ingredient in itself, food and drink manufacturers still innovate with honey as an ingredient in products such as salty-sweet snacks, ready-to-drink tea and cereals.

In recent years, honey has also become trendy as an addition to specialty drinks, flavoured spirits and distilled beverages.

In the table honey market, which constitutes the other 75% of the honey market, the squeeze bottle has been a major innovation. Introduction of the squeeze bottle has resulted in higher demand for liquid honey (with a high fructose/glucose ratio of >1.2).

Tips:

- In your promotion, show examples of innovative applications of your honey or sweetener.
- If you can offer industrial honey at low prices, target food and drink manufacturers to benefit from growth in this segment.
- In order to offer honeys for squeeze bottles and creamed honey separately, find out how long it takes for your different honeys to crystallise and send samples to a laboratory to determine the fructose/glucose ratio. Separate honeys that stay liquid for a long time from the ones that crystallise fast.
- Use marketing stories that focus on the honey's origin, taste, colour and other distinct characteristics, especially if you are targeting niche markets.

5. Restrictions on Genetically Modified Organisms (GMOs)

Many European consumers are afraid of the implications of GMO products. These products are therefore a

subject of debate in European politics, and the market will remain very restricted in the short term. This will limit possibilities for sweeteners from Genetically Modified (GM) crops.

Currently, GM cane sugar and any other GM sweeteners are not authorised to be sold in Europe. In the next three years, GM sweeteners are not expected to be authorised for sale either. Not a single authorisation procedure has been started for these products, and these procedures typically take a few years including all the preparatory work.

Specifically for honey, there has been a lot of attention on GMOs and many importers currently demand honey with a GMO-free certificate. In 2011, a German beekeeper complained to the authorities about the introduction of GM maize in the vicinity of his beehives, which would not allow him to market his honey because of European Union legislation on GM foods.

This complaint led to a discussion on labelling of honey from areas with GM crops. The outcome was positive for honey exporters: GM pollen has to be labelled only if it makes up more than 0.9% of the honey, which is practically never the case.

Tips:

- See our study about [European buyer requirements for the honey and sweeteners market](#).
- If you produce a GM sweetener, you cannot enter the European market in the short term. Authorisation procedures typically require expensive research costing up to hundreds of thousands of euros and are not economically feasible for SMEs.

6. Fairtrade certification on the rise

Consumers in Europe are increasingly concerned about suppliers on the other end of the supply chain. Consumers' purchasing behaviour is increasingly influenced by social factors, such as the working conditions of producers.

Some European consumers respond to this by switching to locally produced honey and sweeteners. Other consumers feel responsible for a fairer trade of products from the poorest producers in the world.

Currently, Fairtrade is the most popular certification scheme related to the conditions of producers. Fairtrade certified producers of cane and natural sweeteners can benefit from the Fairtrade premium that Fairtrade importers pay to profit from contribution funds managed by their producer organisations.

Tips:

- If you or your suppliers are organised in a Small Producer Organisation or beekeeper cooperative, you can implement standards of Fairtrade International for [honey](#), [cane sugar](#) or [other sweeteners](#).
- See our study about [European buyer requirements for the honey and sweeteners market](#) for more information about certification.

7. Environmental consumer awareness

European consumers are increasingly concerned about the impact of agricultural activities on the environment, and are looking for products with a small environmental impact.

This trend has stimulated the market for organic certified products. The organic market in Europe is increasingly becoming mainstream and is highly developed in Western European countries such as Germany, France and the United Kingdom.

The European Union has been actively promoting organic production by developing one harmonised standard and product logo for application in the entire European Union. The [Council Regulation \(EC\) No 834/2007](#) lays down all rules on the organic market in the European Union.

Tip:

- If your production system is organic by default or conversion requires little investment, apply for organic certification. See our study about [European buyer requirements for the honey and sweeteners market](#) for more information on the regulation for organic products on the European Union market.

8. Limited European production of alternative sweeteners

While alternative, natural sweeteners are becoming more popular, the supply to Europe is largely dependent on imports as most of these sweeteners are not produced in Europe. This is mainly due to the specific growing conditions that are needed to produce the crops used for these sweeteners.

For example, both lucuma and yacon (syrup) are only produced in the Andes region in Latin America. In addition, while the palm trees for palm sugar production can be grown in various regions, these are also not suitable for European production. Palm sugar is mainly produced in tropical and West Africa, Madagascar and Southern/Southeast Asia.

Tips:

- Take advantage of Europe's increasing need for imports, which creates many opportunities for exporters of sweeteners in developing countries.
- For more information about specific sweeteners, see our studies on [monofloral honey](#), [Fairtrade honey](#), [organic honey](#), [industrial honey](#), [palm sugar](#), [raw cane sugar](#), [yacon syrup](#) and [lucuma](#).

9. Decline in European production of honey

The production levels in Europe are decreasing. Currently, only 60% of the European honey market is self-sufficient, and that ratio is expected to decline even more in the long term.

Several factors contribute to the overall decline of the European beekeeping sector. These include intensive agriculture and pesticide use. The European Union has proposed a regulation against the use of certain pesticides ([Regulation \(EU\) No 485/2013](#)). The European Union's proposal targets pesticides used in the treatment of plants and cereals that are attractive to bees and pollinators.

The new regulation is expected to have a positive effect on bee health and bee populations in Europe. However, honey production is not likely to increase significantly as a result. Large-scale honey production is becoming less profitable due to increasing labour costs and the fact that pollination receives priority over honey production.

Tip:

- See our [study with trade statistics for honey](#) for data on the decline in European honey production.

10. More testing to counter honey laundering

Honey laundering refers to the re-labelling of honey from one origin to another, with the aim to improve the perceived quality by honey buyers. Sometimes honey exporters in countries which are not on the 'third country list' or which have a bad reputation cooperate with international traders to 'launder' honey.

In 2011, Chinese honey was shipped to Thailand and India and then re-labelled before it entered Europe and the US. Although China is on the 'third country list', the country has a bad reputation and many European importers avoid Chinese honey.

European buyers are increasingly testing imported honey on region-specific honey characteristics. This allows them to determine if a honey has been laundered and take counter-measures.

Tips:

- Urge the authorities in your country to prevent honey laundering by taking strict quality control measures on a national level. For more information on the ethical charter for the international honey trade, please refer to Apimondia's [report](#).
- See our [study on European buyer requirements for honey and sweeteners](#) for more information on the countries authorised to trade honey to Europe.

11. Monofloral honeys

Monofloral varieties such as acacia, clover, fir and pine are gaining popularity in the leading European honey markets. Consumption of these honeys and other monofloral honeys from outside Europe is increasing at annual rates of 5-15% and is expected to grow further compared to blended honeys.

However, there are differences between consumer preferences in different European countries. For example, the United Kingdom, Germany and France are among the European honey markets with the highest interest in monofloral honeys. In these countries, even supermarket chains focusing on mainstream products offer a range of monofloral honeys.

Tip:

- If your company offers monofloral honey varieties, stay informed about the different country preferences for honey. Make sure that the range of monofloral honey you can offer is clearly communicated to your buyers. Focusing on the flower origin and its natural features can be a great marketing story behind your product.
- See our [study on monofloral honey](#) for more specific information on this market.