



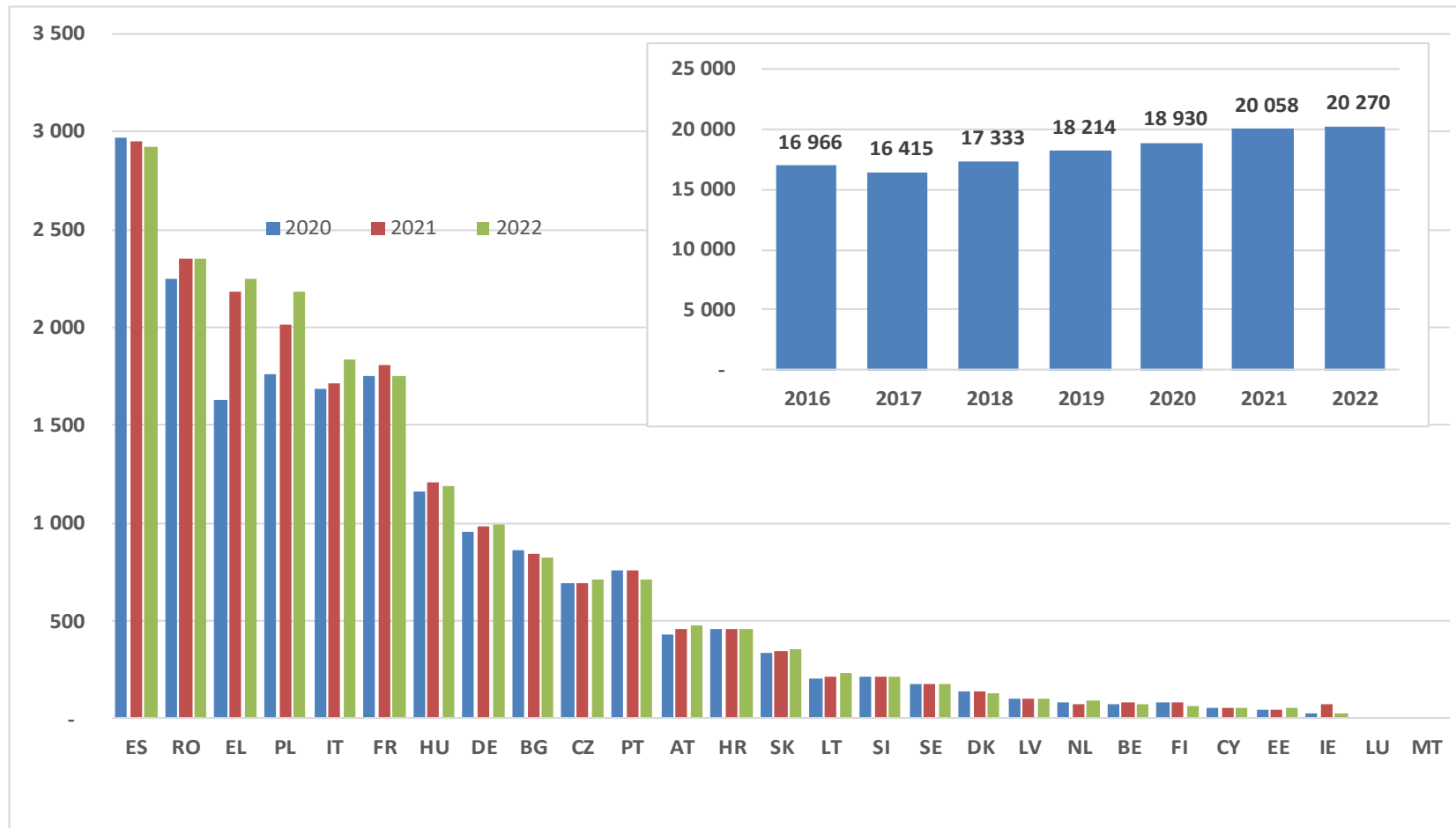
Honey Market Presentation

Expert Group for Agricultural Markets

18 April 2024



Evolution of the number of hives (in thousand)

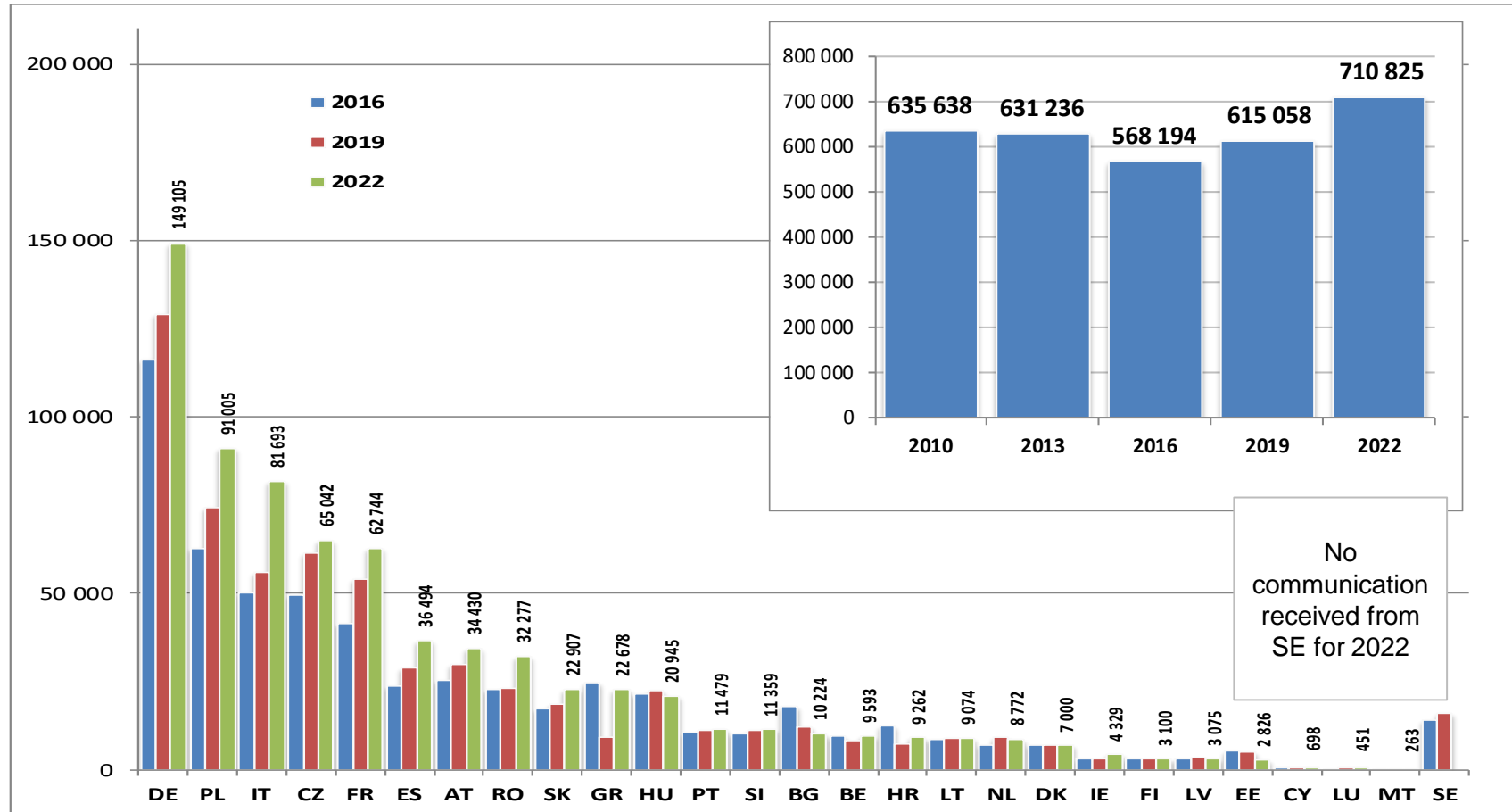


Source : Commission Implementing Regulation (EU) 2022/1475





Evolution of the number of beekeepers

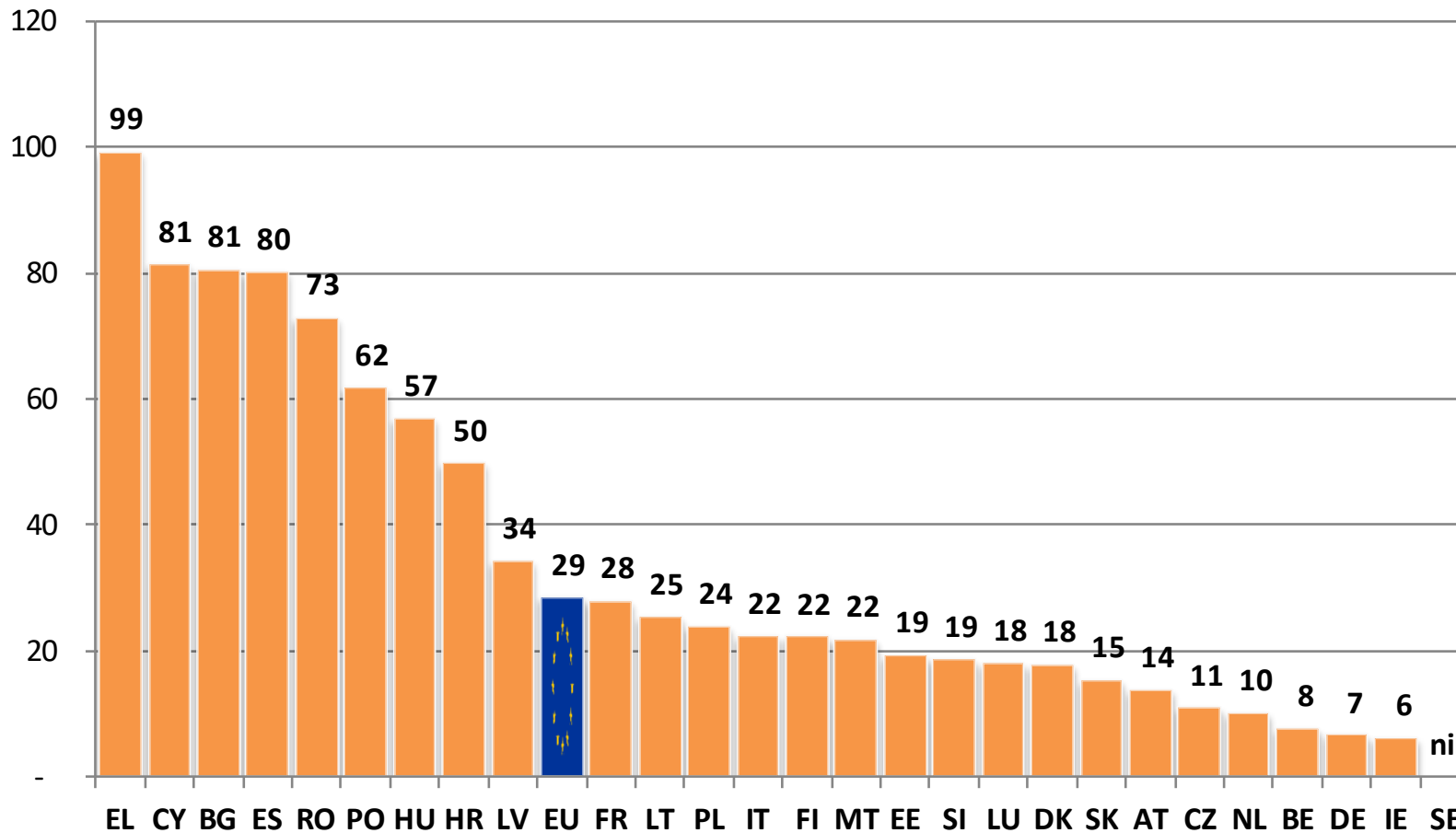


Source: Before 2019 – Commission Implementing Regulation (EU)2015/1368; after 2022 – Commission Implementing Regulation (EU)2022/1475

Number of hives per beekeeper



Average Number of Hives per Beekeeper (2022)

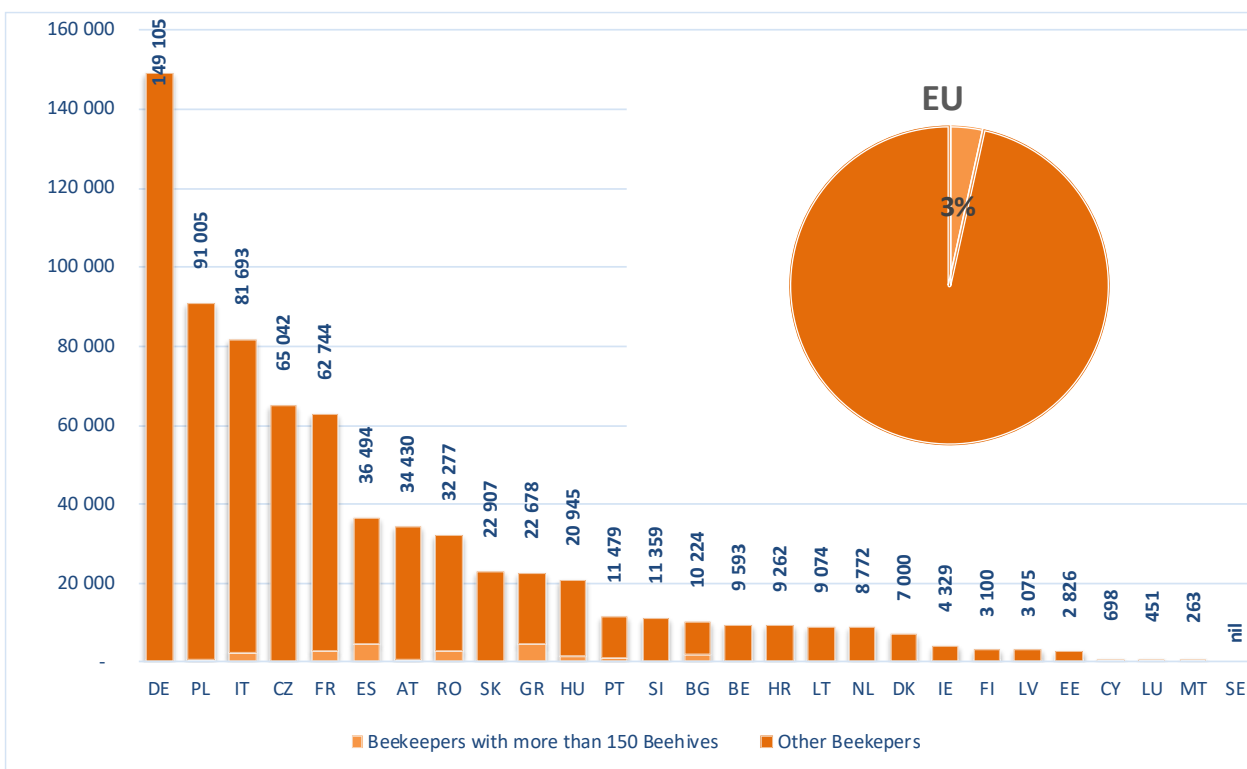


Source: Commission Implementing Regulation (EU)2022/1475

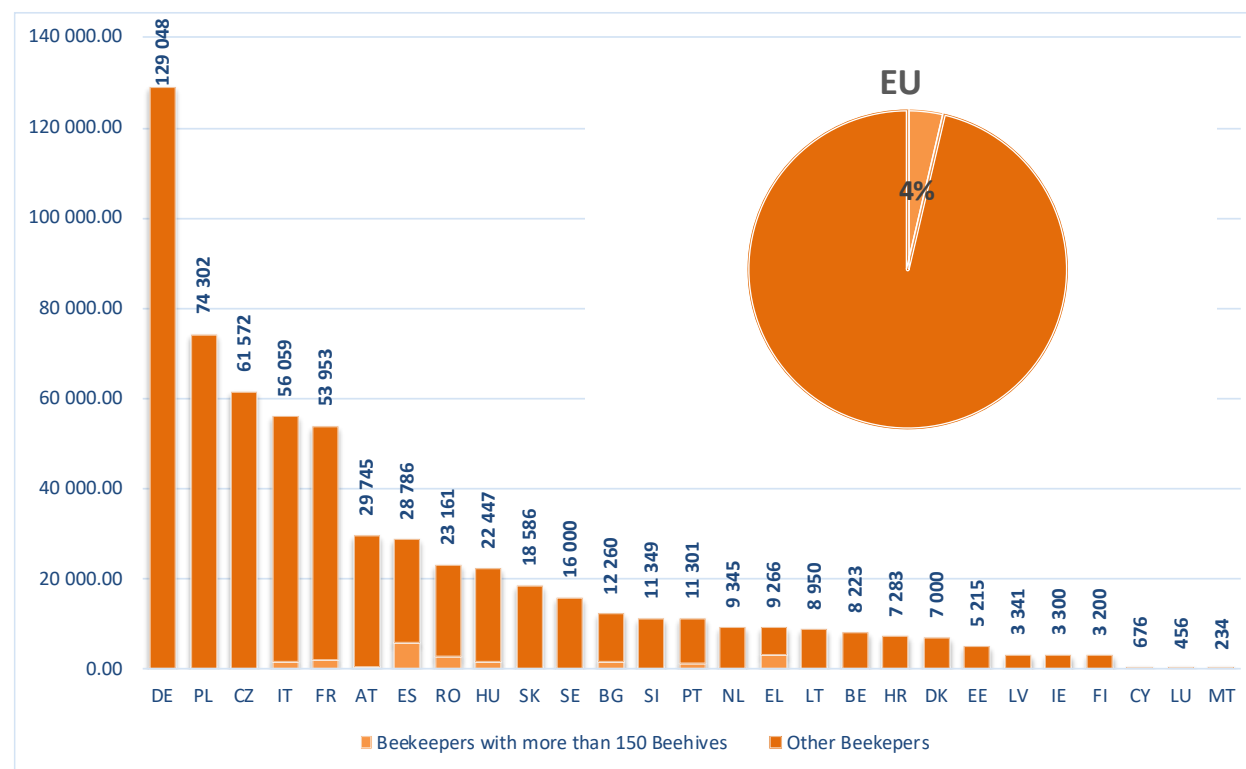
Share of beekeepers with more than 150 beehives



Share of beekeepers with more than 150 Beehives (2022)

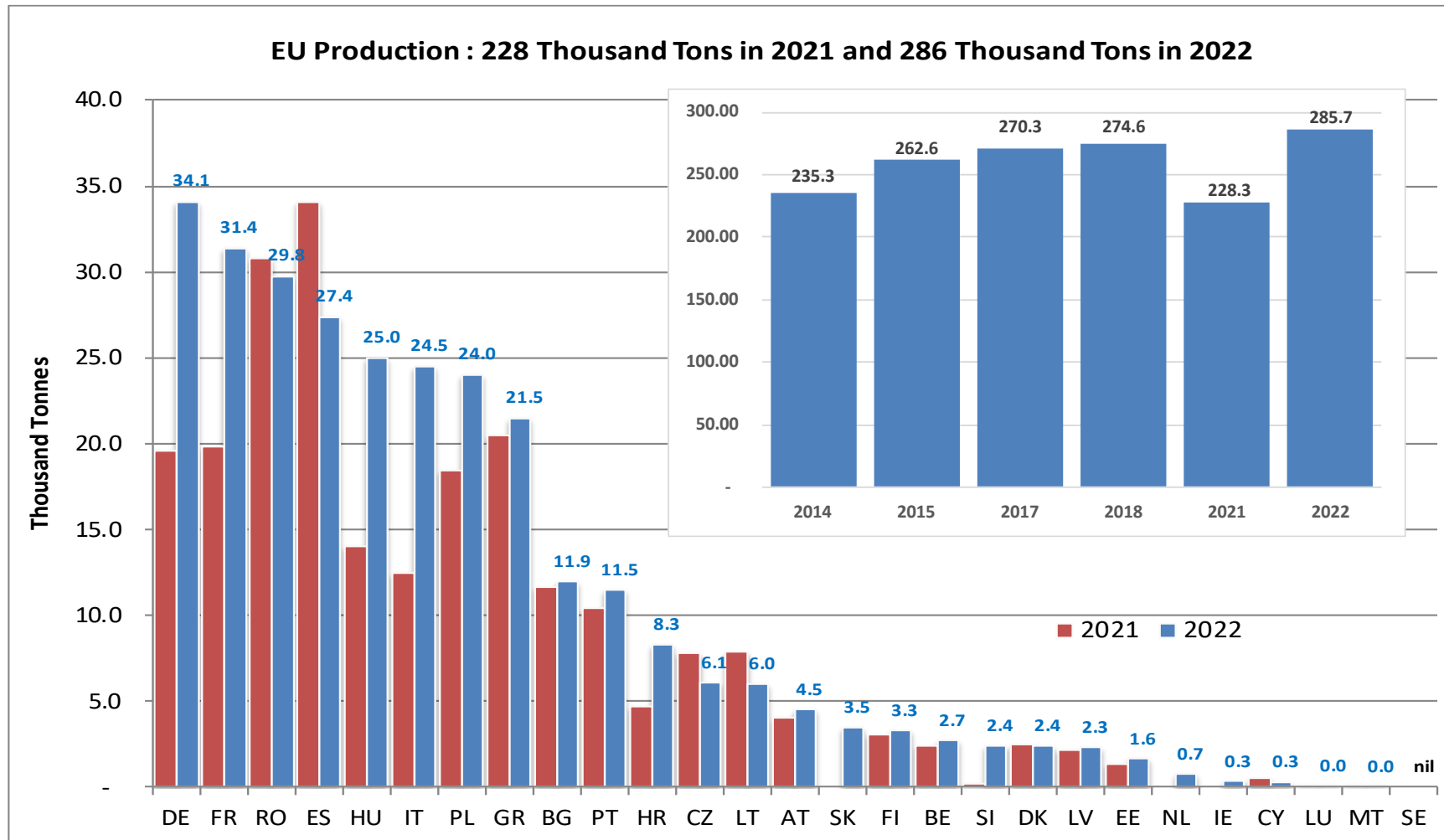


Share of beekeepers with more than 150 Beehives (2018)



Source : Commission Implementing Regulation (EU)2022/1475

EU Honey Production



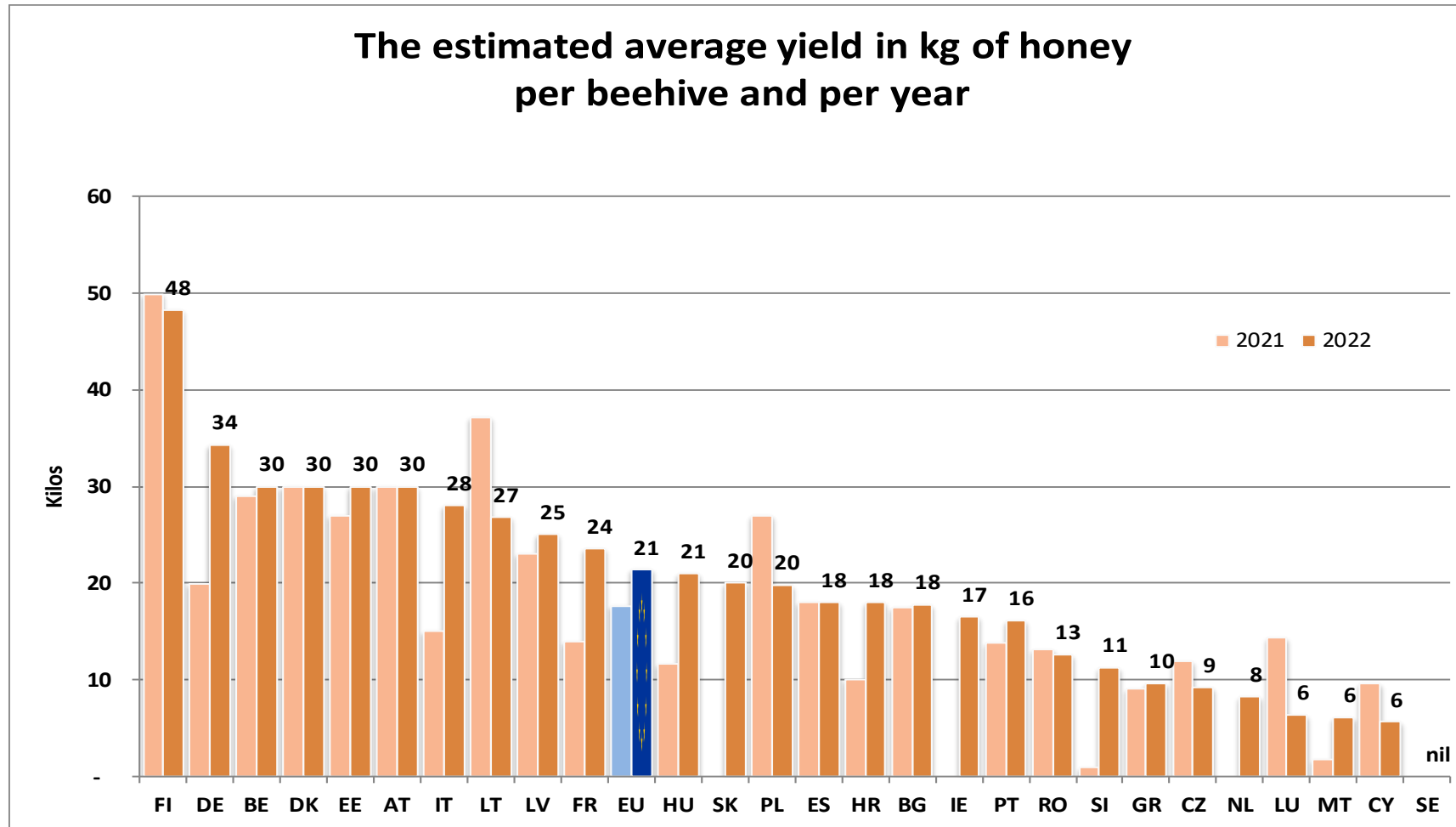
Source: Before 2019 – Commission Implementing Regulation (EU)2015/1368; after 2022 – Commission Implementing Regulation (EU)2022/1475



Estimated yield per beehive



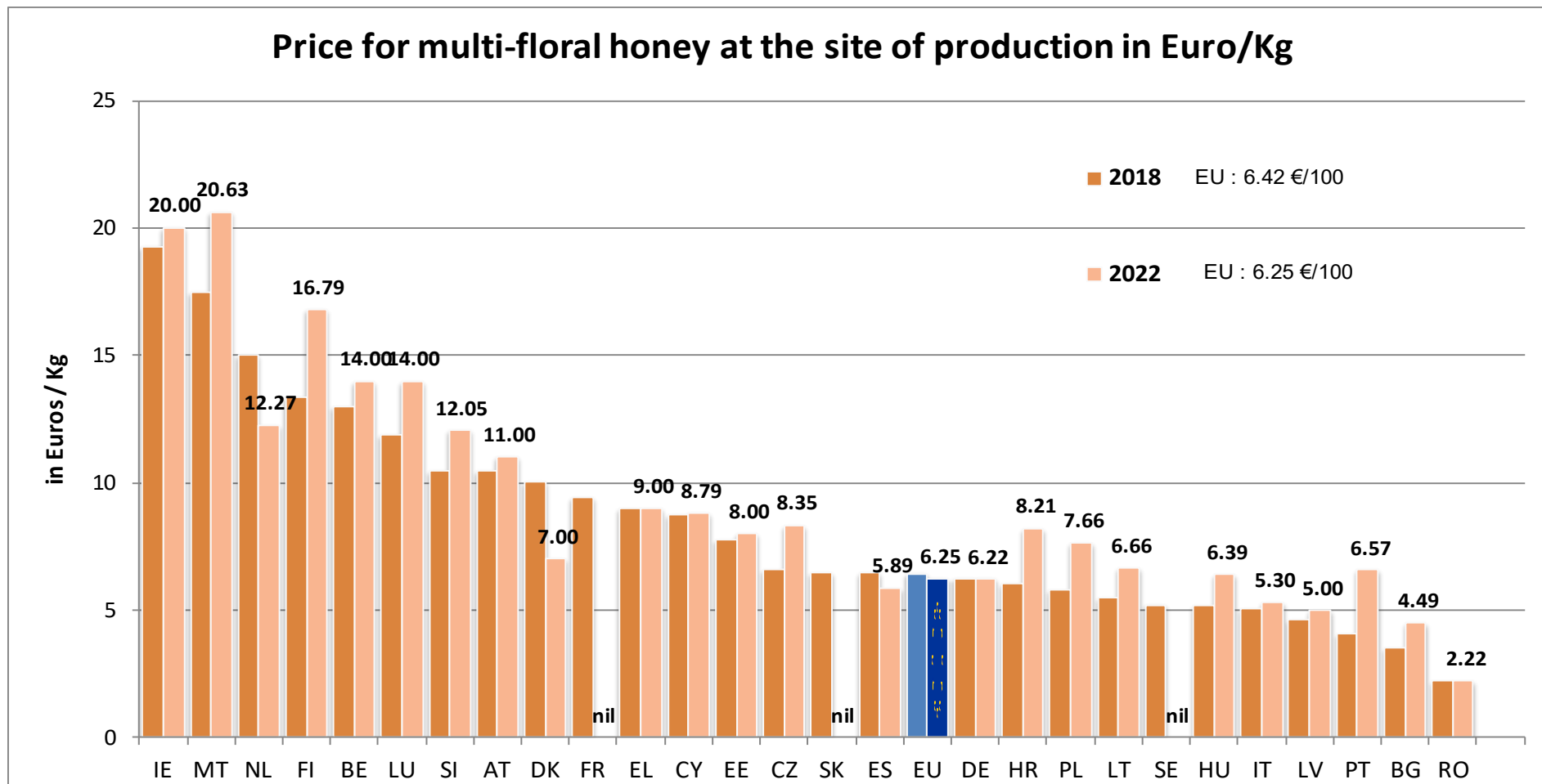
The estimated average yield in kg of honey per beehive and per year



Source : Commission Implementing Regulation (EU)2022/1475



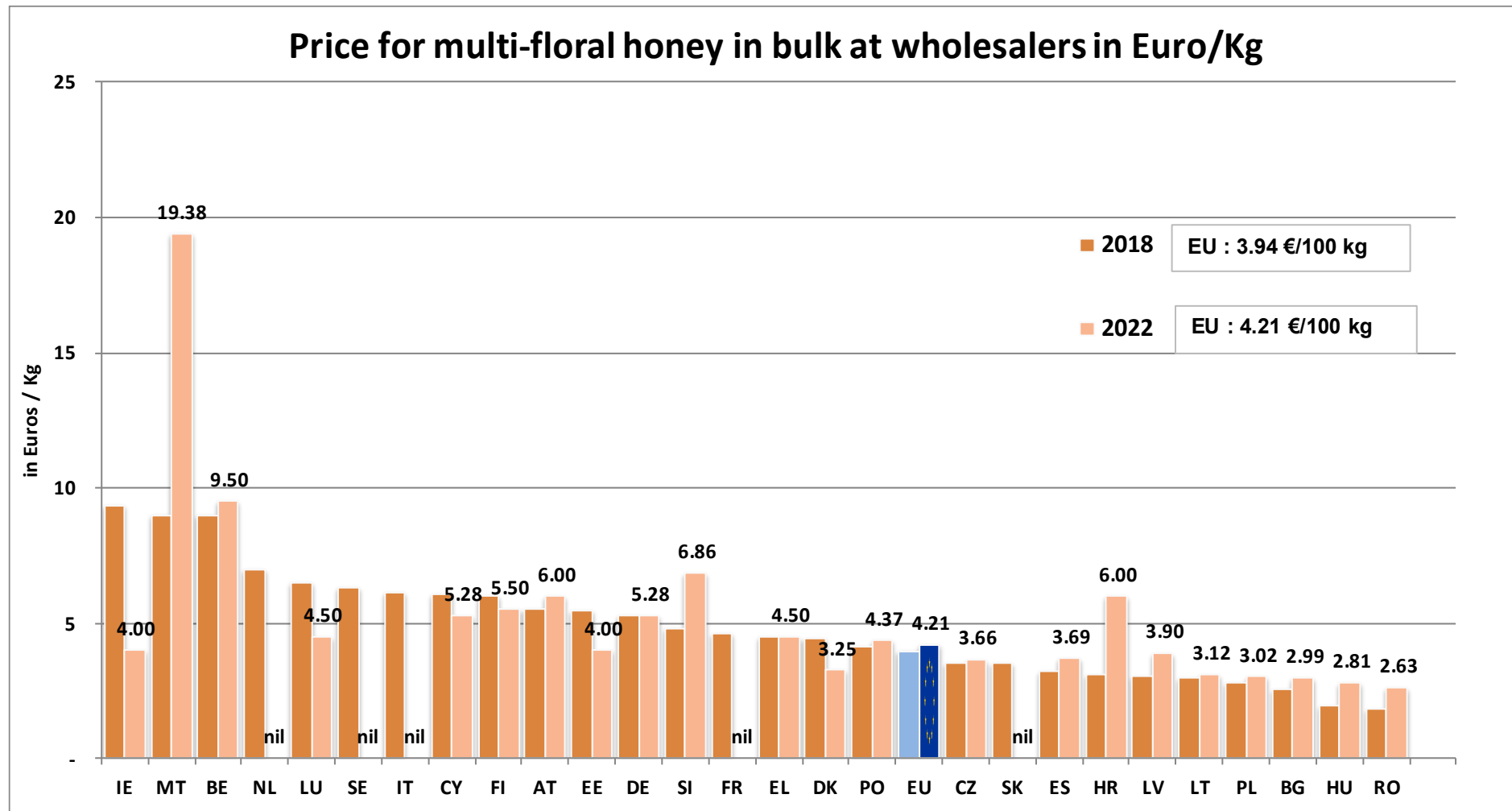
Honey price at production site



Source : Commission Implementing Regulation (EU)2022/1475



Honey price at wholesalers



Source : Commission Implementing Regulation (EU)2022/1475

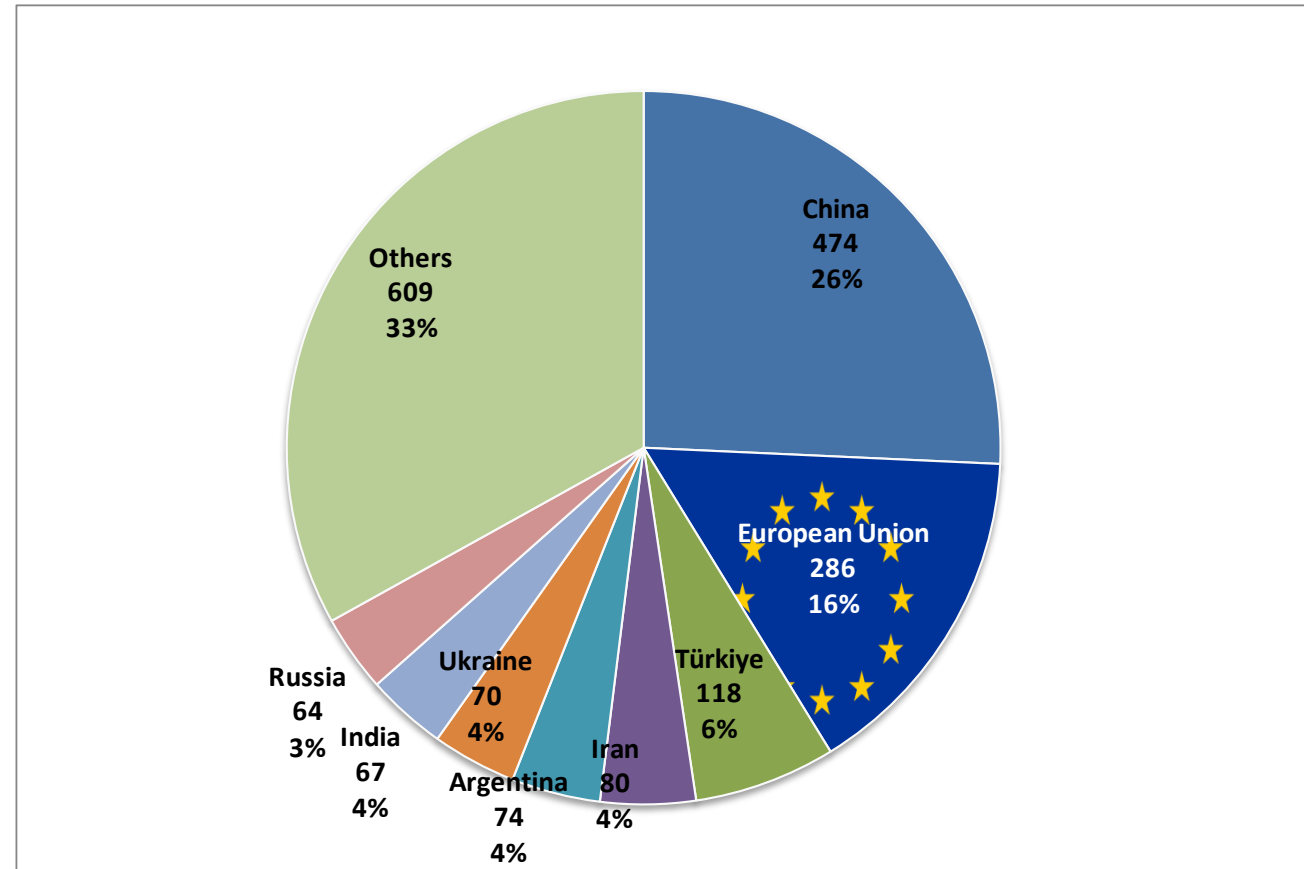


World Production of Honey per Country (1 000 T)



	2021	2022	Share of World Production
China	486	474	26%
European Union (27)	228	286	16%
Türkiye	96	118	6%
Iran (Islamic Republic of)	77	80	4%
India	74	74	4%
Argentina	71	70	4%
Russian Federation	65	67	4%
Mexico	62	64	3%
Ukraine	69	63	3%
Brazil	56	61	3%
United States of America	57	57	3%
Canada	40	34	2%
United Republic of Tanzania	32	31	2%
Republic of Korea	30	30	2%
Viet Nam	21	24	1%
Angola	23	23	1%
New Zealand	21	22	1%
Ethiopia	13	18	1%
Central African Republic	17	17	1%
Kenya	17	17	1%
Uzbekistan	14	15	1%
Serbia	7	14	1%
China, Taiwan Province of	13	12	1%
Other	209	171	9%
	1 799	1 843	

Source : FAO



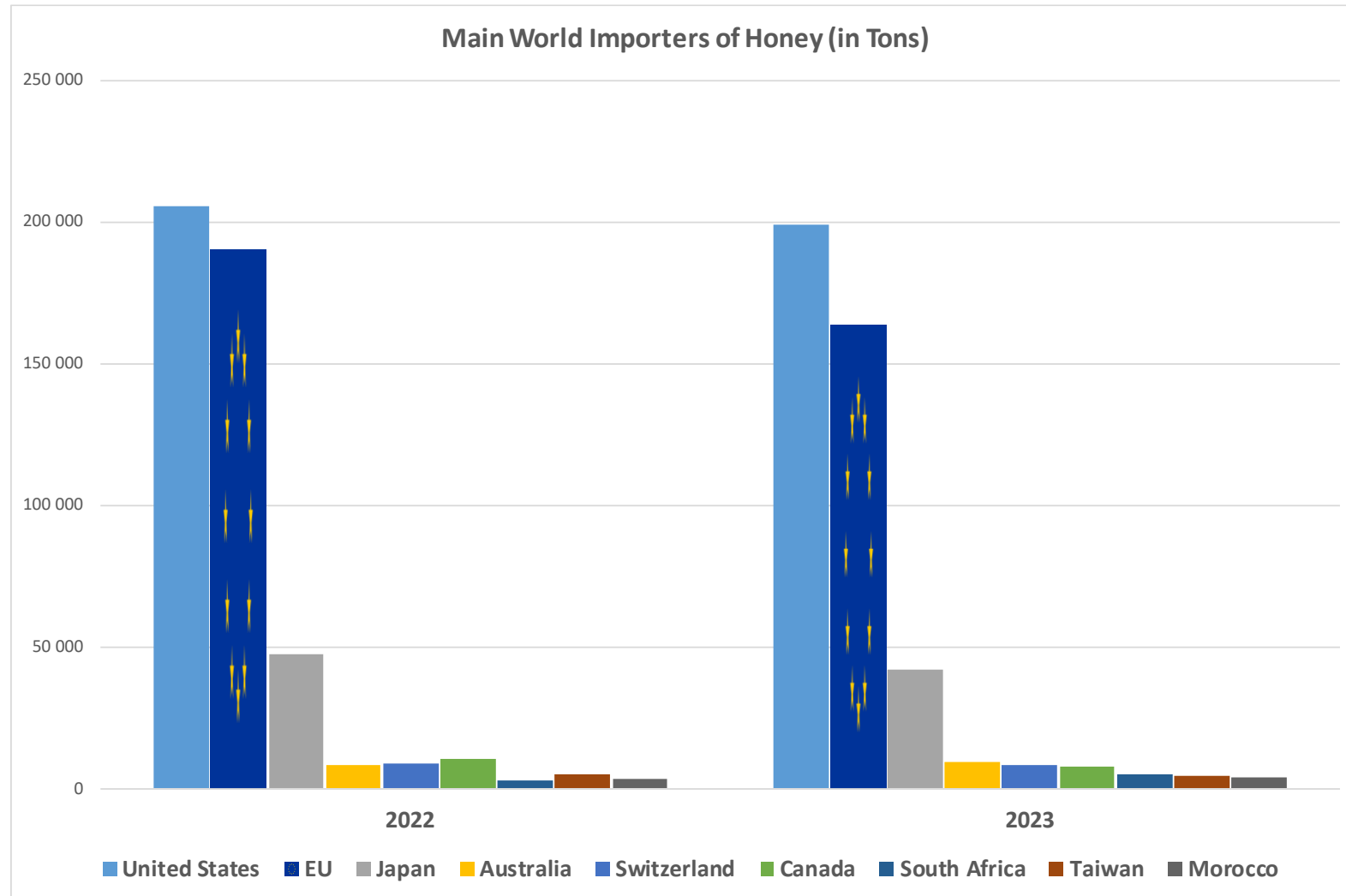
World Imports of Honey by Region



	2021		2022		Share of World Imports in 2022	
	Tons	1 000 €	Tons	1 000 €	Tons	1 000 €
European Union	173 511	406 806	190 444	504 380	33.9%	26.4%
North America	228 496	595 904	215 824	808 658	38.5%	42.3%
<i>of which USA</i>	220 232	563 566	205 160	754 268	36.6%	39.4%
Asia	81 985	350 151	80 643	351 739	14.4%	18.4%
<i>of which Japan</i>	47 132	143 515	47 277	159 205	8.4%	8.3%
<i>China</i>	3 105	20 841	3 734	67 746	0.7%	3.5%
Near and Middle Eastern Countries	43 807	153 907	26 209	82 766	4.7%	4.3%
Other European Countries	59 775	167 722	19 135	83 766	3.4%	4.4%
Africa	18 977	27 540	18 952	34 646	3.4%	1.8%
Oceania and Polar Regions	8 035	31 339	7 987	40 240	1.4%	2.1%
Central America and Carribeans	1 424	4 584	1 422	5 614	0.3%	0.3%
South America	989	2 849	599	2 094	0.1%	0.1%
Total	616 999	1 740 801	561 215	1 913 903		

Source : UN Comtrade

Main World Importers of Honey (2023/2022)



Source : Global Trade Atlas



EU Imports of Honey by Origin (in Tons)



In tons

	2020		2021		2022		2023		Compared to 2022	
	% Extra EU		% Extra EU		% Extra EU		% Extra EU			
China	36 790	21.0%	48 139	27.7%	68 428	35.9%	60 177	36.8%	↓	-12.1%
Ukraine	54 802	31.3%	53 836	31.0%	46 094	24.2%	45 822	28.0%	↓	-0.6%
Argentina	22 816	13.0%	14 396	8.3%	19 446	10.2%	20 450	12.5%	↑	+5.2%
Mexico	17 393	9.9%	15 486	8.9%	13 797	7.2%	10 731	6.6%	↓	-22.2%
Cuba	6 993	4.0%	7 052	4.1%	6 571	3.5%	4 744	2.9%	↓	-27.8%
Vietnam	598	0.3%	924	0.5%	6 383	3.4%	4 697	2.9%	↓	-26.4%
Brazil	6 079	3.5%	7 934	4.6%	5 760	3.0%	2 967	1.8%	↓	-48.5%
Chile	2 182	1.2%	3 063	1.8%	3 609	1.9%	2 541	1.6%	↓	-29.6%
Others	27 259	15.6%	22 680	13.1%	20 358	10.7%	11 575	7.1%	↓	-43.1%
Extra EU	174 912		173 511		190 444		163 705			
% Change			↓ -0.8%		↑ +9.8%		↓ -14.0%			

Source : Eurostat Comext

EU Imports of Honey by Origin (in Thousand Euros)



	2020		2021		2022		2023		Compared to 2022	
	% Extra EU		% Extra EU		% Extra EU		% Extra EU			
Ukraine	83 696	23.3%	101 595	25.0%	121 080	24.0%	94 863	26.4%	↓	-21.7%
China	50 613	14.1%	65 739	16.2%	108 384	21.5%	83 698	23.3%	↓	-22.8%
Argentina	50 121	13.9%	39 412	9.7%	64 276	12.7%	48 400	13.5%	↓	-24.7%
Mexico	38 600	10.7%	44 634	11.0%	50 597	10.0%	33 079	9.2%	↓	-34.6%
New Zealand	30 759	8.5%	32 663	8.0%	32 618	6.5%	24 592	6.8%	↓	-24.6%
Cuba	12 806	3.6%	14 653	3.6%	17 464	3.5%	12 320	3.4%	↓	-29.5%
Brazil	13 209	3.7%	21 982	5.4%	20 791	4.1%	9 562	2.7%	↓	-54.0%
Turkey	10 623	3.0%	11 830	2.9%	19 643	3.9%	8 194	2.3%	↓	-58.3%
Others	69 534	19.3%	74 296	18.3%	69 528	13.8%	44 605	12.4%	↓	-35.8%
Extra EU	359 961		406 804		504 380		359 312			
% Change			↑ +13.0%		↑ +24.0%		↓ -28.8%			

EU Imports from Third Countries by Member State (in Tons)



	2021		2022		2023		Compared to 2022	
	% Extra EU		% Extra EU		% Extra EU			
DE	51 886	29.9%	52 034	27.3%	40 998	25.0%	↓	-21.2%
BE	25 645	14.8%	33 245	17.5%	31 395	19.2%	↓	-5.6%
PL	32 114	18.5%	27 348	14.4%	23 315	14.2%	↓	-14.7%
ES	14 480	8.3%	18 158	9.5%	15 666	9.6%	↓	-13.7%
FR	6 771	3.9%	6 475	3.4%	7 696	4.7%	↑	+18.9%
PT	7 079	4.1%	10 115	5.3%	7 687	4.7%	↓	-24.0%
NL	5 035	2.9%	9 750	5.1%	6 501	4.0%	↓	-33.3%
IT	4 301	2.5%	7 079	3.7%	5 798	3.5%	↓	-18.1%
IE	2 467	1.4%	4 295	2.3%	4 607	2.8%	↑	+7.3%
GR	683	0.4%	1 233	0.6%	3 587	2.2%	↑	+190.9%
RO	4 126	2.4%	3 795	2.0%	3 557	2.2%	↓	-6.3%
Others	2 000	1.2%	16 918	8.9%	12 898	7.9%	↓	-23.8%
EU	173 511		190 444		163 705		↓	-14.0%

Source : Eurostat Comext

EU Imports of Honey from Ukraine by Member State (in Tons)

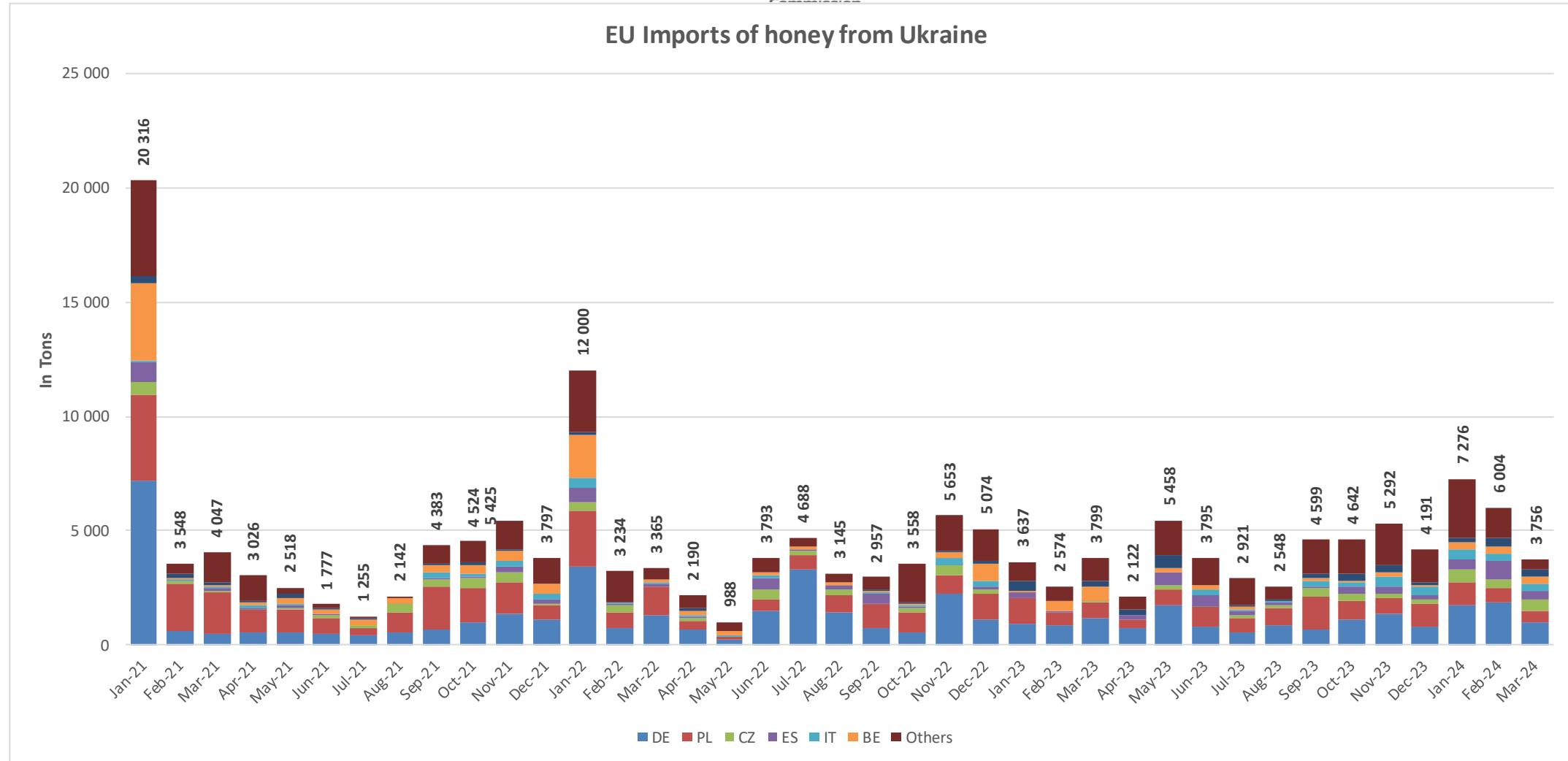


	2019		2020		2021		2022		2023		% change 2022	
		% of EU		% of EU		% of EU		% of EU		% of EU		
DE	11 108	24.9%	11 692	21.3%	11 692	21.7%	11 739	25.5%	10 994	24.0%	↓	-6.3%
PL	12 597	28.3%	21 677	39.6%	16 918	31.4%	10 591	23.0%	9 478	20.7%	↓	-10.5%
FR	6 085	13.7%	4 203	7.7%	4 337	8.1%	4 298	9.3%	4 998	10.9%	↑	+16.3%
ES	1 420	3.2%	1 246	2.3%	1 863	3.5%	2 280	4.9%	2 789	6.1%	↑	+22.3%
IT	869	2.0%	959	1.8%	1 294	2.4%	2 371	5.1%	2 745	6.0%	↑	+15.8%
GR	0	0.0%	0	0.0%	0	0.0%	516	1.1%	2 583	5.6%	+++	
RO	23	0.1%	2 094	3.8%	1 169	2.2%	536	1.2%	2 517	5.5%	+++	
BE	6 911	15.5%	6 160	11.2%	6 225	11.6%	3 850	8.4%	1 990	4.3%	↓	-48.3%
HU	0	0.0%	0	0.0%	1 806	3.4%	1 842	4.0%	1 574	3.4%	↓	-14.6%
CZ	1 174	2.6%	1 074	2.0%	2 673	5.0%	2 412	5.2%	1 513	3.3%	↓	-37.3%
DK	1 727	3.9%	1 797	3.3%	1 614	3.0%	1 082	2.3%	1 505	3.3%	↑	+39.1%
BG	323	0.7%	421	0.8%	518	1.0%	973	2.1%	1 060	2.3%	↑	+8.9%
AT	501	1.1%	630	1.1%	428	0.8%	435	0.9%	635	1.4%	↑	+46.1%
LT	792	1.8%	1 483	2.7%	1 630	3.0%	885	1.9%	407	0.9%	↓	-54.0%
HR	0	0.0%	41	0.1%	123	0.2%	62	0.1%	371	0.8%	+++	
SK	812	1.8%	1 015	1.9%	996	1.9%	1 441	3.1%	351	0.8%	↓	-75.6%
NL	0	0.0%	0	0.0%	432	0.8%	721	1.6%	253	0.6%	↓	-64.9%
SI	62	0.1%	40	0.1%	41	0.1%	41	0.1%	62	0.1%	↑	+50.0%
EE	121	0.3%	270	0.5%	79	0.1%	20	0.0%	0	0.0%	↓	-100.0%
IE	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%		
LV	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%		
EU	44 523		54 802		53 836		46 094		45 822		↓	-0.6%

Source : Eurostat Comext

EU Imports from Ukraine by Member State (in Tons)

recent preliminary data



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



	2019	2020	2021	2022	2023	compared to 2022	
China	1.40	1.38	1.37	1.58	1.39	↓	-12.2%
Ukraine	1.68	1.53	1.89	2.63	2.07	↓	-21.2%
Argentina	2.28	2.20	2.74	3.31	2.37	↓	-28.4%
Mexico	2.56	2.22	2.88	3.67	3.08	↓	-15.9%
Cuba	2.11	1.83	2.08	2.66	2.60	↓	-2.3%
Vietnam	1.39	1.33	1.71	2.01	1.70	↓	-15.8%
Brazil	2.67	2.17	2.77	3.61	3.22	↓	-10.7%
Chile	2.71	2.72	3.50	4.03	2.96	↓	-26.6%
Turkey	3.46	3.33	2.53	2.63	3.42	↑	+30.0%
United Kingdom	4.29	4.23	4.13	4.37	4.48	↑	+2.6%
Moldova	2.69	2.26	3.24	3.57	3.27	↓	-8.4%
Russia	2.21	2.11	2.11	2.07	1.70	↓	-17.8%
Uruguay	1.99	1.78	2.69	3.27	2.43	↓	-25.7%
New Zealand	28.52	29.13	28.10	21.06	29.41	↑	+39.7%
Nicaragua	3.06	2.75	3.13	3.92	3.44	↓	-12.1%
Extra EU	2.13	2.06	2.34	2.65	2.19	↓	-17.1%
Extra EU (excl. NZ)	2.02	1.89	2.17	2.50	2.06	↓	-17.7%

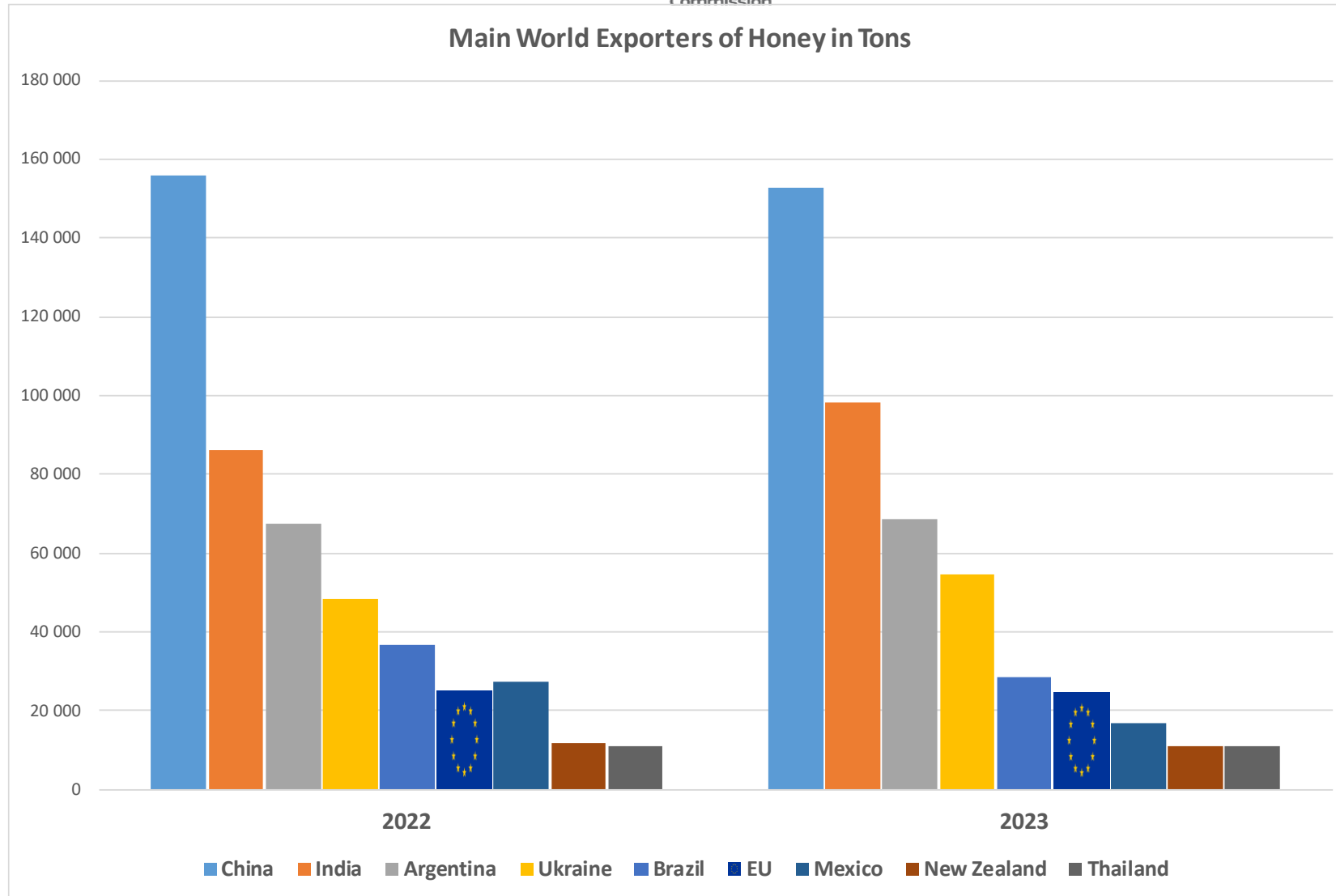
World Exports of Honey by Region



	2021		2022		Share of World Exports in 2022	
	Tons	1 000 €	Tons	1 000 €	Tons	1 000 €
Asia	258 501	452 020	277 760	588 918	49.2%	31.5%
<i>of which China</i>	145 317	218 974	154 965	261 750	27.4%	14.0%
South America	121 146	349 860	123 005	412 626	21.8%	22.1%
Other European Countries	74 309	172 336	56 499	170 788	10.0%	9.1%
Central America and Carribeans	28 620	89 299	30 459	114 281	5.4%	6.1%
European Union	25 423	146 443	25 028	151 917	4.4%	8.1%
North America	16 141	54 934	21 157	85 065	3.7%	4.6%
<i>of which USA</i>	8 610	24 047	10 002	30 378	1.8%	1.6%
<i>Canada</i>	7 531	30 888	11 155	54 687	2.0%	2.9%
Oceania and Polar Regions	16 865	313 009	15 581	291 409	2.8%	15.6%
Near and Middle Eastern Countries	20 942	73 803	11 124	34 169	2.0%	1.8%
Africa	4 254	14 087	4 095	18 522	0.7%	1.0%
Total	566 202	1 665 792	564 706	1 867 696		

Source : UN Comtrade

Main World Exporters of Honey (2023/2022)



Source : Global Trade Atlas



EU Exports of Honey by Destination (in Tons)



In tons

	2020		2021		2022		2023		Compared to 2022	
	% Extra EU		% Extra EU		% Extra EU		% Extra EU			
United Kingdom	8 016	25.5%	4 576	18.0%	4 551	18.2%	4 347	17.5%	↓	-4.5%
Saudi Arabia	3 817	12.1%	3 306	13.0%	2 432	9.7%	3 547	14.3%	↑	+45.8%
Switzerland	4 034	12.8%	3 908	15.4%	3 895	15.6%	3 350	13.5%	↓	-14.0%
USA	3 408	10.8%	2 793	11.0%	3 183	12.7%	3 283	13.2%	↑	+3.1%
Japan	2 154	6.9%	2 131	8.4%	2 810	11.2%	2 533	10.2%	↓	-9.9%
Israel	680	2.2%	613	2.4%	980	3.9%	1 295	5.2%	↑	+32.1%
Canada	984	3.1%	1 344	5.3%	1 295	5.2%	918	3.7%	↓	-29.1%
Morocco	565	1.8%	516	2.0%	560	2.2%	806	3.2%	↑	+43.9%
Others	7 779	24.7%	6 236	24.5%	5 321	21.3%	4 770	19.2%	↓	-10.3%
Extra EU	31 437		25 423		25 028		24 849			
% Change			↓ -19.1%		↓ -1.6%		↓ -0.7%			

Source : Eurostat Comext

EU Exports of Honey by Destination (in Thousand Euros)



	2020		2021		2022		2023		Compared to 2022	
		% Extra EU		% Extra EU		% Extra EU		% Extra EU		
Saudi Arabia	24 550	15.0%	19 975	13.6%	17 161	11.3%	23 888	16.4%	↑	+39.2%
United Kingdom	30 028	18.3%	22 579	15.4%	23 320	15.4%	22 734	15.6%	↓	-2.5%
Switzerland	22 902	14.0%	22 756	15.5%	24 622	16.2%	22 710	15.6%	↓	-7.8%
USA	19 664	12.0%	18 634	12.7%	20 580	13.5%	20 199	13.8%	↓	-1.8%
Japan	14 068	8.6%	14 658	10.0%	18 488	12.2%	14 979	10.3%	↓	-19.0%
U.A.Emirates	9 270	5.7%	7 547	5.2%	7 447	4.9%	5 930	4.1%	↓	-20.4%
Canada	3 795	2.3%	5 478	3.7%	5 969	3.9%	3 943	2.7%	↓	-33.9%
Israel	1 916	1.2%	1 719	1.2%	3 032	2.0%	3 401	2.3%	↑	+12.2%
Others	37 578	22.9%	33 096	22.6%	31 296	20.6%	28 151	19.3%	↓	-10.0%
Extra EU	163 770		146 443		151 916		145 936			
% Change			↓ -10.6%		↑ +3.7%		↓ -3.9%			

EU exports to Third Countries by Member State (in Tons)

	2021		2022		2023		Compared to 2022	
	% Extra EU		% Extra EU		% Extra EU			
ES	6 923	27.2%	6 791	27.1%	7 128	28.7%	↑	+5.0%
DE	6 302	24.8%	5 191	20.7%	5 513	22.2%	↑	+6.2%
RO	916	3.6%	1 349	5.4%	1 746	7.0%	↑	+29.4%
HU	1 756	6.9%	2 242	9.0%	1 577	6.3%	↓	-29.6%
EL	1 160	4.6%	1 268	5.1%	1 474	5.9%	↑	+16.2%
FR	1 749	6.9%	1 605	6.4%	1 312	5.3%	↓	-18.2%
PL	980	3.9%	1 598	6.4%	1 199	4.8%	↓	-24.9%
IT	762	3.0%	1 007	4.0%	930	3.7%	↓	-7.7%
AT	925	3.6%	853	3.4%	845	3.4%	↓	-0.9%
BG	707	2.8%	547	2.2%	487	2.0%	↓	-10.9%
IE	361	1.4%	270	1.1%	449	1.8%	↑	+66.0%
Others	9 805	38.6%	2 308	9.2%	2 191	8.8%	↓	-5.1%
EU	25 423		25 028		24 849		↓	-0.7%

Source : Eurostat Comext

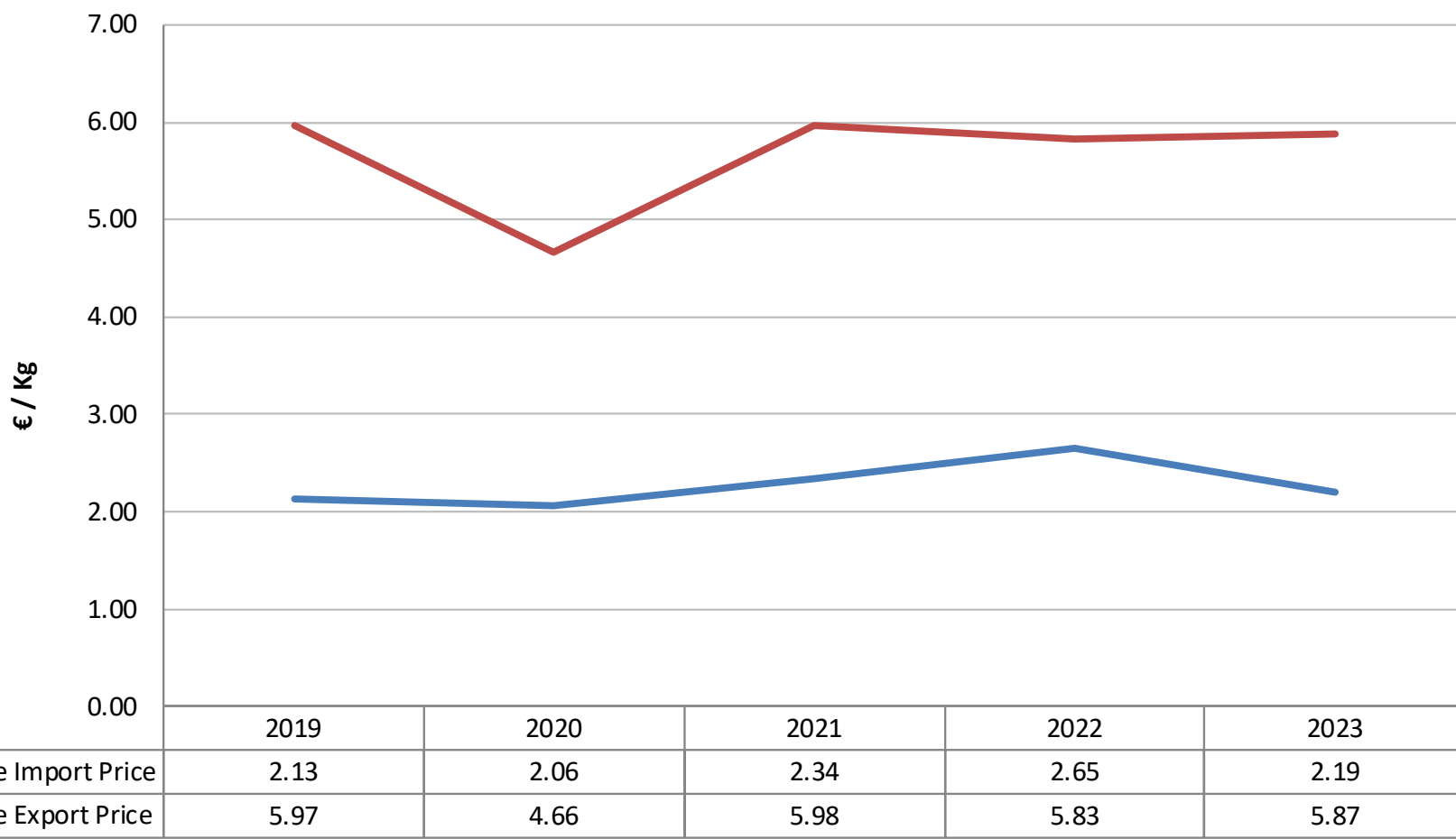
EU Average Unit Value of Exported Honey (€/kg) by Destination



	2019	2020	2021	2022	2023	Compared to 2022
United Kingdom	3.98	3.75	4.93	5.12	5.23	↑ +2.1%
Saudi Arabia	7.53	6.43	6.04	7.06	6.74	↓ -4.5%
Switzerland	5.41	5.68	5.82	6.32	6.78	↑ +7.2%
USA	6.29	5.77	6.67	6.47	6.15	↓ -4.8%
Japan	5.75	6.53	6.88	6.58	5.91	↓ -10.1%
Israel	2.84	2.82	2.81	3.09	2.63	↓ -15.1%
Canada	3.89	3.86	4.08	4.61	4.30	↓ -6.8%
Morocco	2.80	2.57	3.43	4.00	3.11	↓ -22.3%
U.A.Emirates	7.51	7.72	8.10	8.16	7.96	↓ -2.4%
Norway	5.39	5.27	5.74	6.47	6.00	↓ -7.2%
China	7.44	6.32	5.87	6.99	5.28	↓ -24.6%
Bosnia-Herz.	4.78	4.58	4.07	4.22	5.01	↑ +18.7%
Hong Kong	6.99	6.79	6.62	7.66	7.93	↑ +3.4%
Jordan	4.85	4.79	5.42	6.42	5.74	↓ -10.6%
Philippines	6.01	5.89	6.37	6.11	6.68	↑ +9.4%
Extra EU	5.97	4.66	5.98	5.83	5.87	↑ +0.7%

Source : Eurostat Comext

Import and Export Unit Values



Source : Eurostat Comext



Summary of EU honey market situation (1)



- EU remains second world producer (~285 000 tons, 2022) after China
- EU honey production increased in 2022 compared to 2021 harvest
- Longer term increase in number of beehives slowed down (20,3 millions, 2022)



Summary of EU honey market situation (2)



- EU remains only ~63% self-sufficient in honey
- Imports needed to cover EU domestic consumption
- China and Ukraine remain key suppliers
- EU honey trade balance keeps largely negative: Imports>Exports



Where to find data:



EUROPA SITE MARKETS

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

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Thank you



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