



Honey Market Presentation

Civil Dialogue Group Beekeeping

8 October 2024

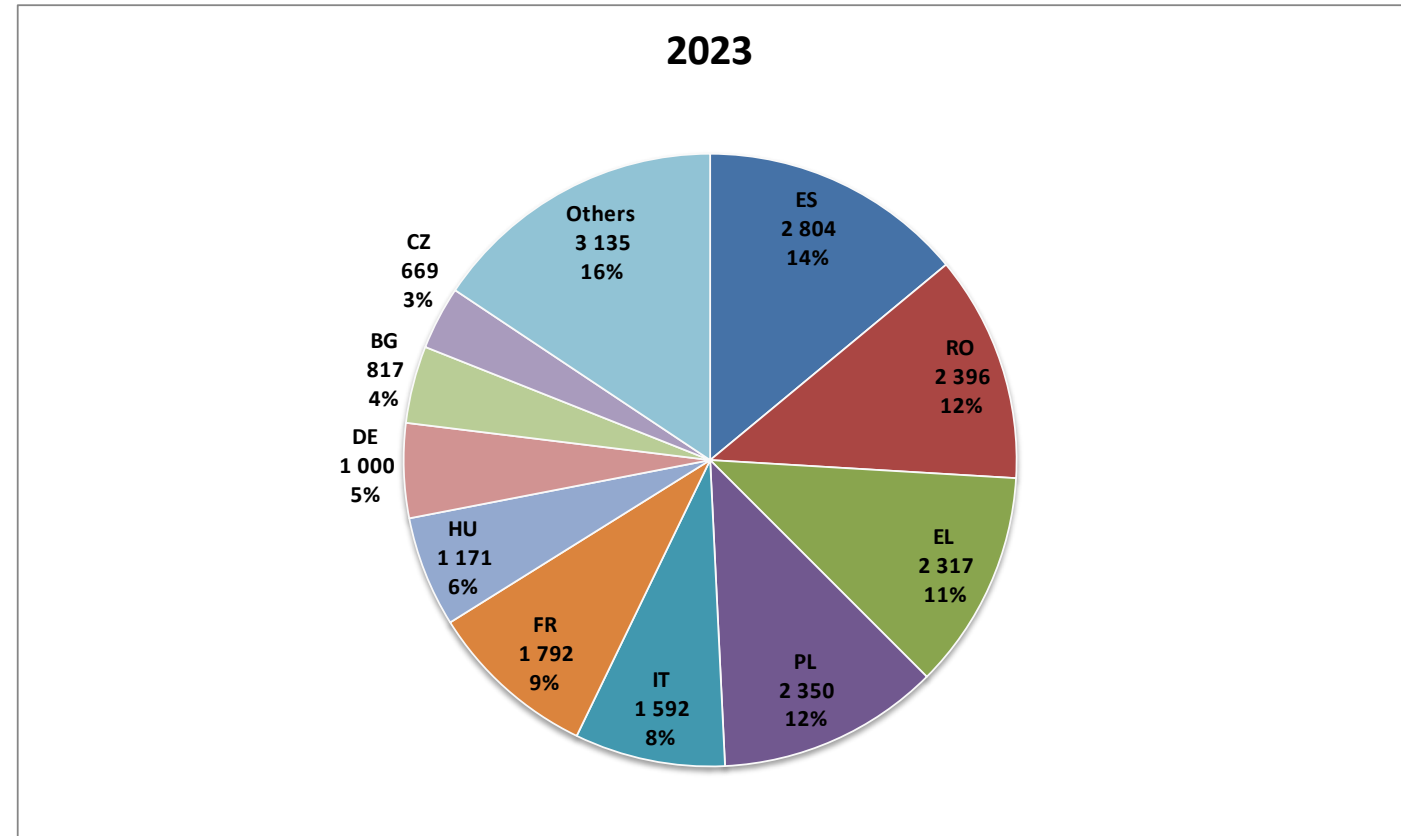


Number (in thousand) and share of beehives per MS

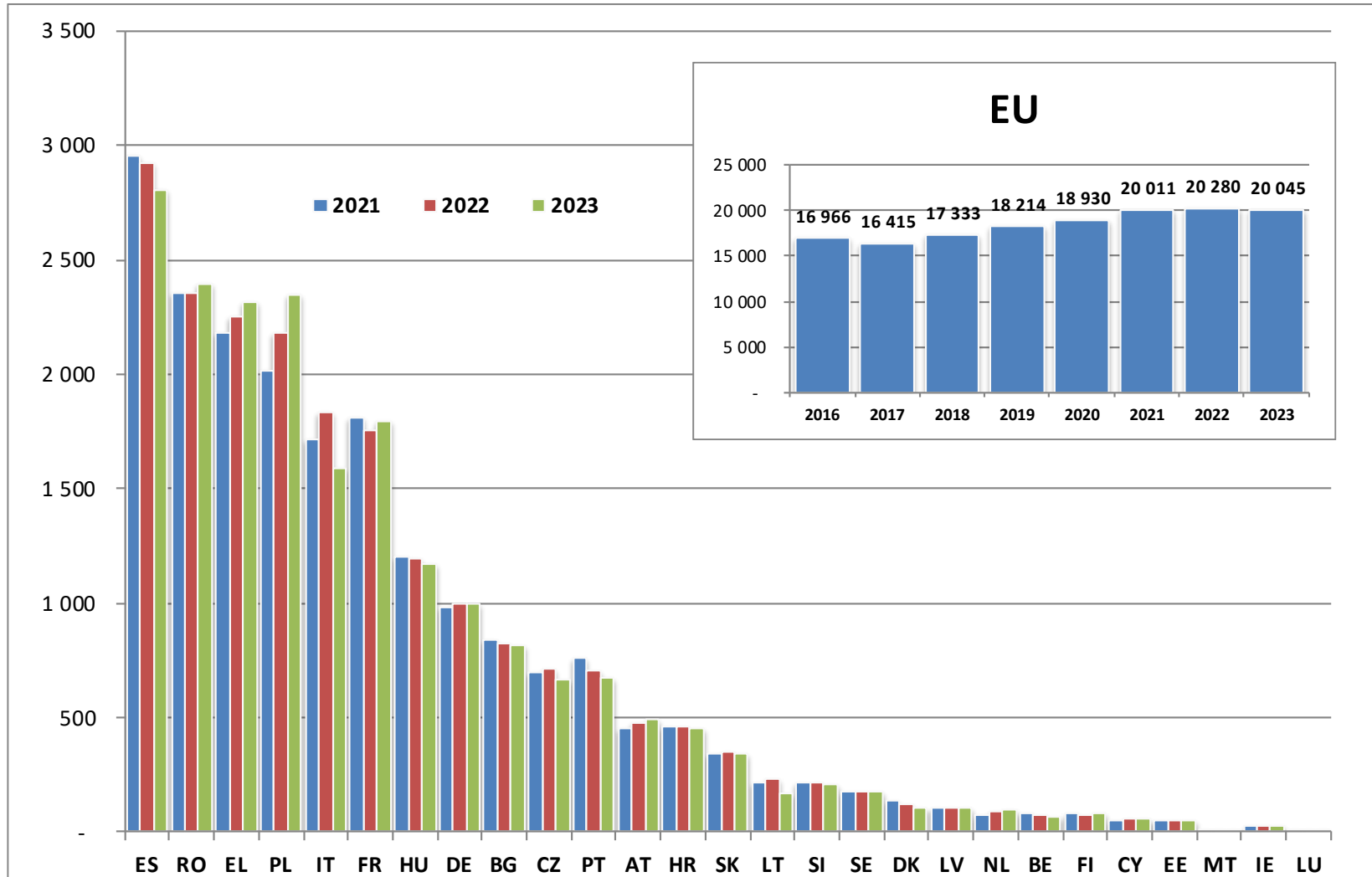


	2021	2022	2022/2021	2023	2023/2022
ES	2 953	2 923	↓ -1.0%	2 804	↓ -4.1%
RO	2 353	2 355	↑ +0.1%	2 396	↑ +1.7%
EL	2 183	2 249	↑ +3.0%	2 317	↑ +3.0%
PL	2 013	2 181	↑ +8.3%	2 350	↑ +7.8%
IT	1 717	1 834	↑ +6.8%	1 592	↓ -13.1%
FR	1 808	1 756	↓ -2.9%	1 792	↑ +2.1%
HU	1 207	1 192	↓ -1.3%	1 171	↓ -1.7%
DE	982	996	↑ +1.4%	1 000	↑ +0.4%
BG	838	823	↓ -1.8%	817	↓ -0.8%
CZ	695	715	↑ +3.0%	669	↓ -6.4%
PT	758	710	↓ -6.3%	678	↓ -4.4%
AT	456	480	↑ +5.2%	494	↑ +3.1%
HR	460	461	↑ +0.3%	450	↓ -2.4%
SK	344	355	↑ +3.2%	342	↓ -3.5%
LT	216	230	↑ +6.4%	170	↓ -26.2%
SI	213	213	↑ +0.2%	208	↓ -2.7%
SE	179	179	+0.0%	179	+0.0%
DK	140	126	↓ -10.3%	110	↓ -12.2%
LV	104	105	↑ +1.2%	103	↓ -2.6%
NL	78	90	↑ +15.5%	100	↑ +10.8%
BE	82	75	↓ -9.1%	70	↓ -6.4%
FI	86	78	↓ -8.4%	82	↑ +5.3%
CY	55	57	↑ +3.6%	56	↓ -0.9%
EE	50	55	↑ +9.6%	52	↓ -6.0%
MT	6	6	↓ -0.6%	6	↑ +4.6%
IE	27	27	↑ +0.1%	27	+0.0%
LU	7	8	↑ +16.7%	7	↓ -11.6%
EU	20 011	20 280	↑ +1.3%	20 045	↓ -1.2%

Source : Commission Implementing Regulation (EU) 2022/1475



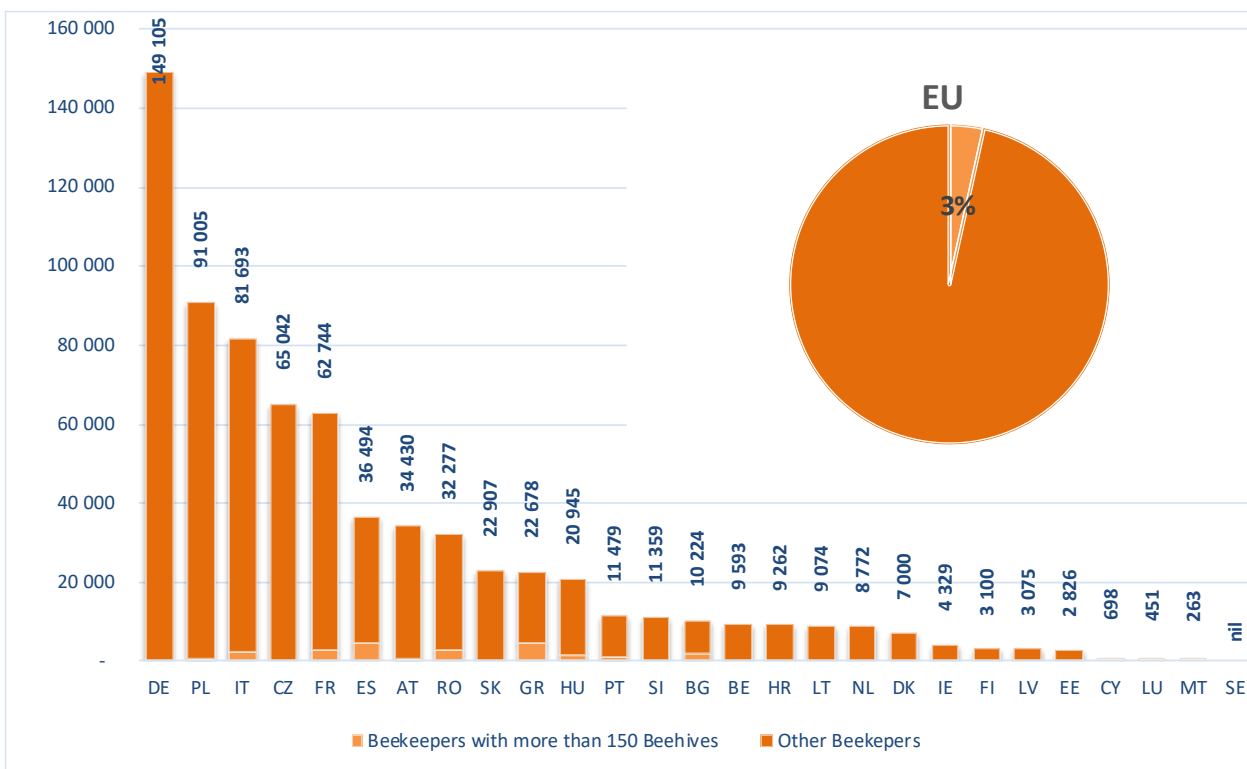
Evolution of the number of hives (in thousand)



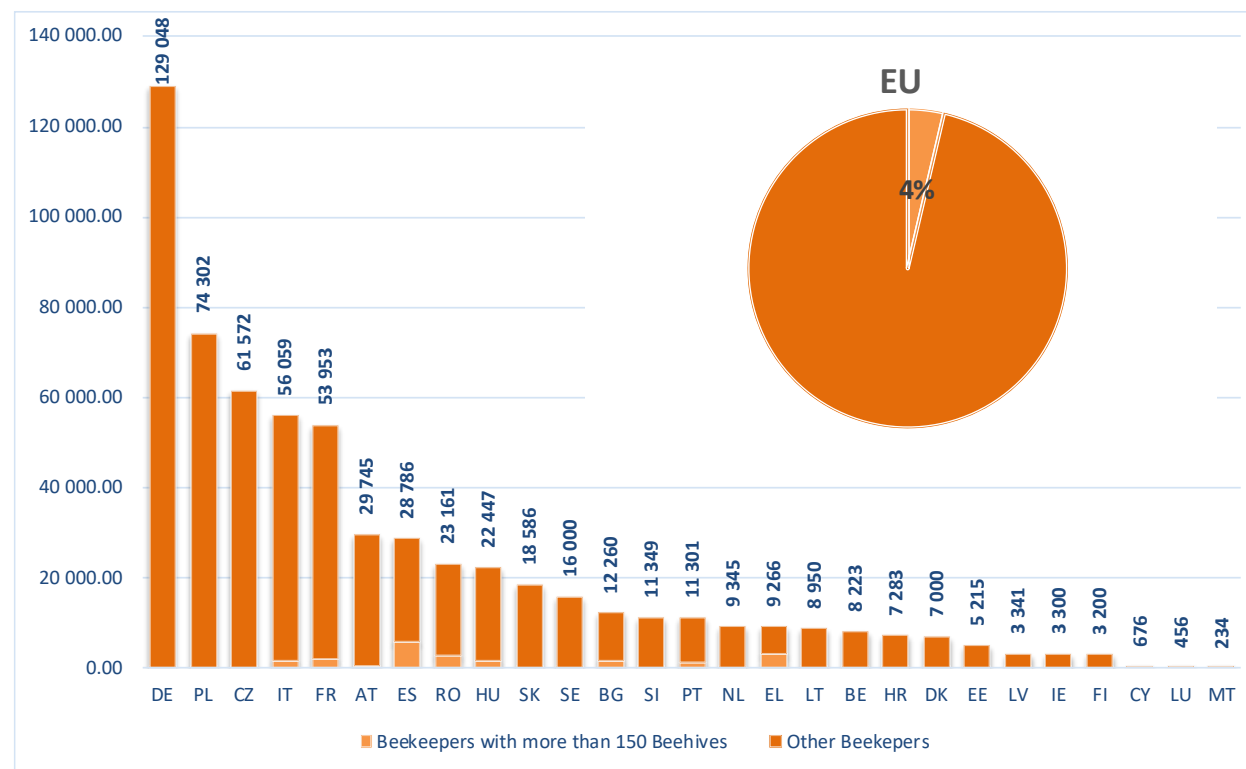
Share of beekeepers with more than 150 beehives



Share of beekeepers with more than 150 Beehives (2022)



Share of beekeepers with more than 150 Beehives (2018)

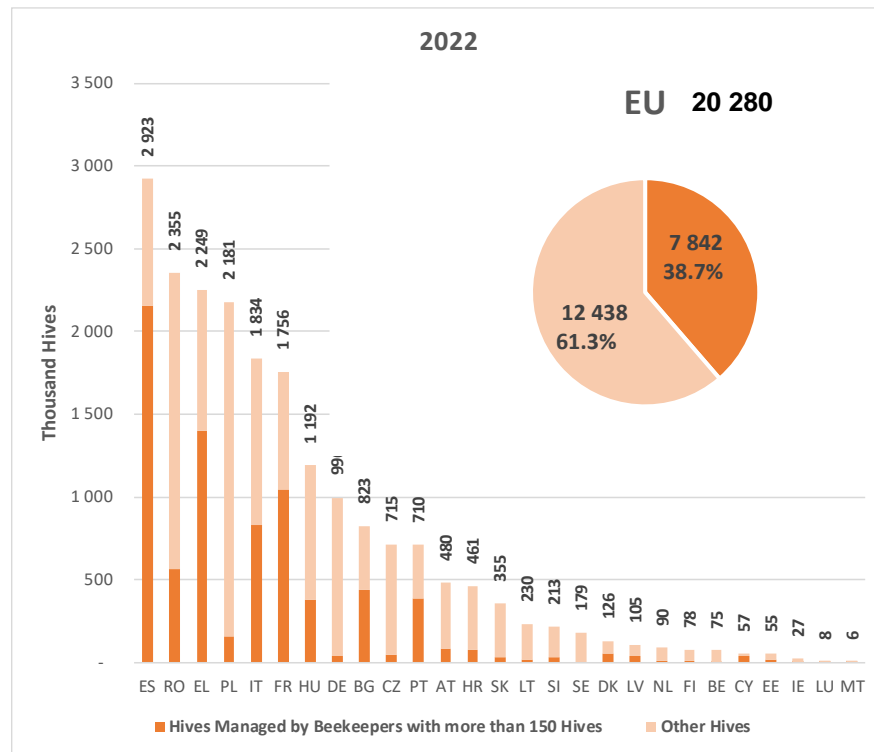


Source : Commission Implementing Regulation (EU)2022/1475

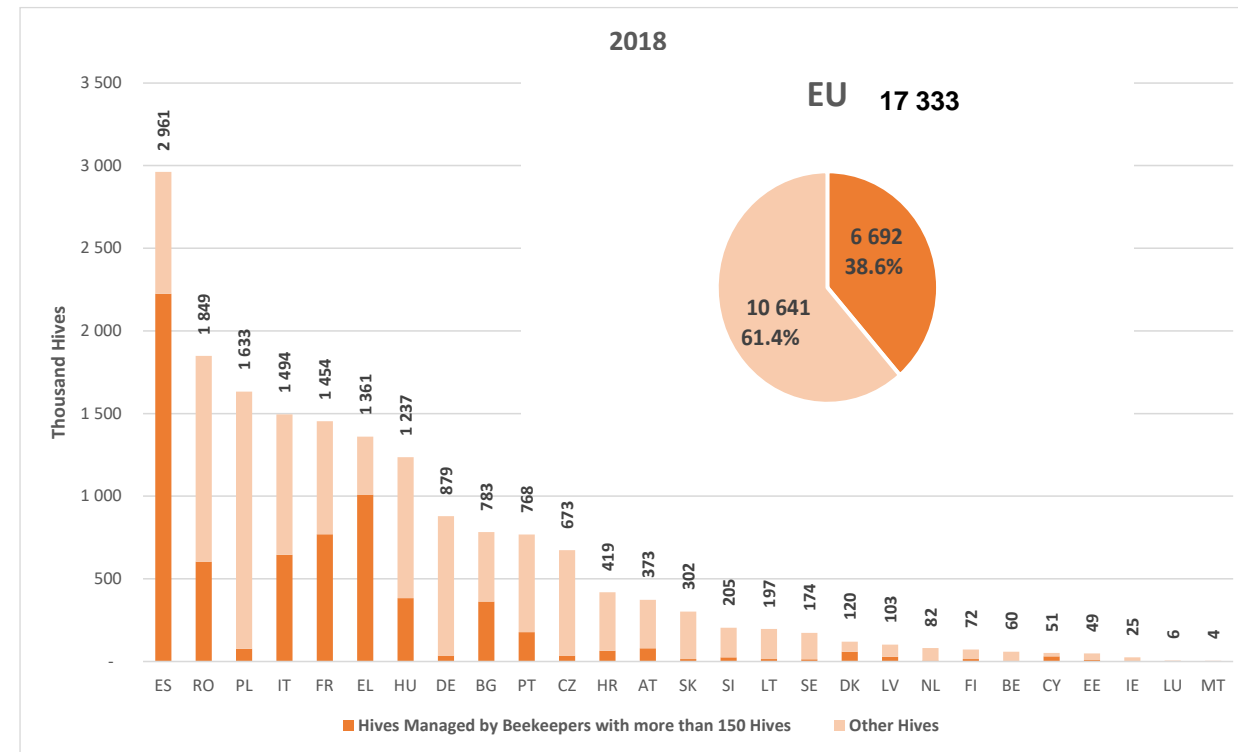
Share of beehives managed by beekeepers with more than 150 beehives



Share of beehives managed by beekeepers with more than 150 beehives (2022)

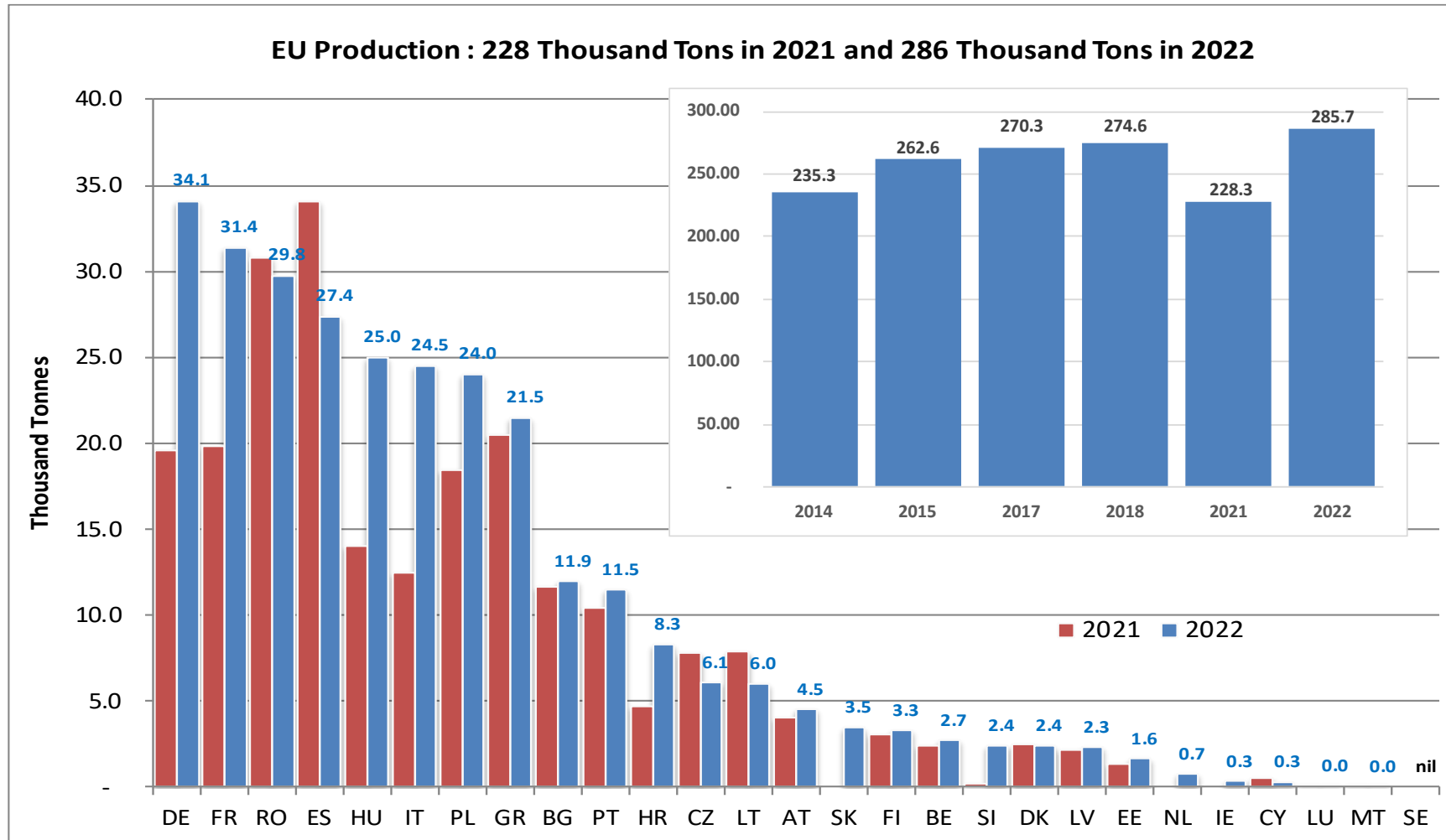


Share of beehives managed by beekeepers with more than 150 beehives (2018)



Source : Commission Implementing Regulation (EU)2022/1475

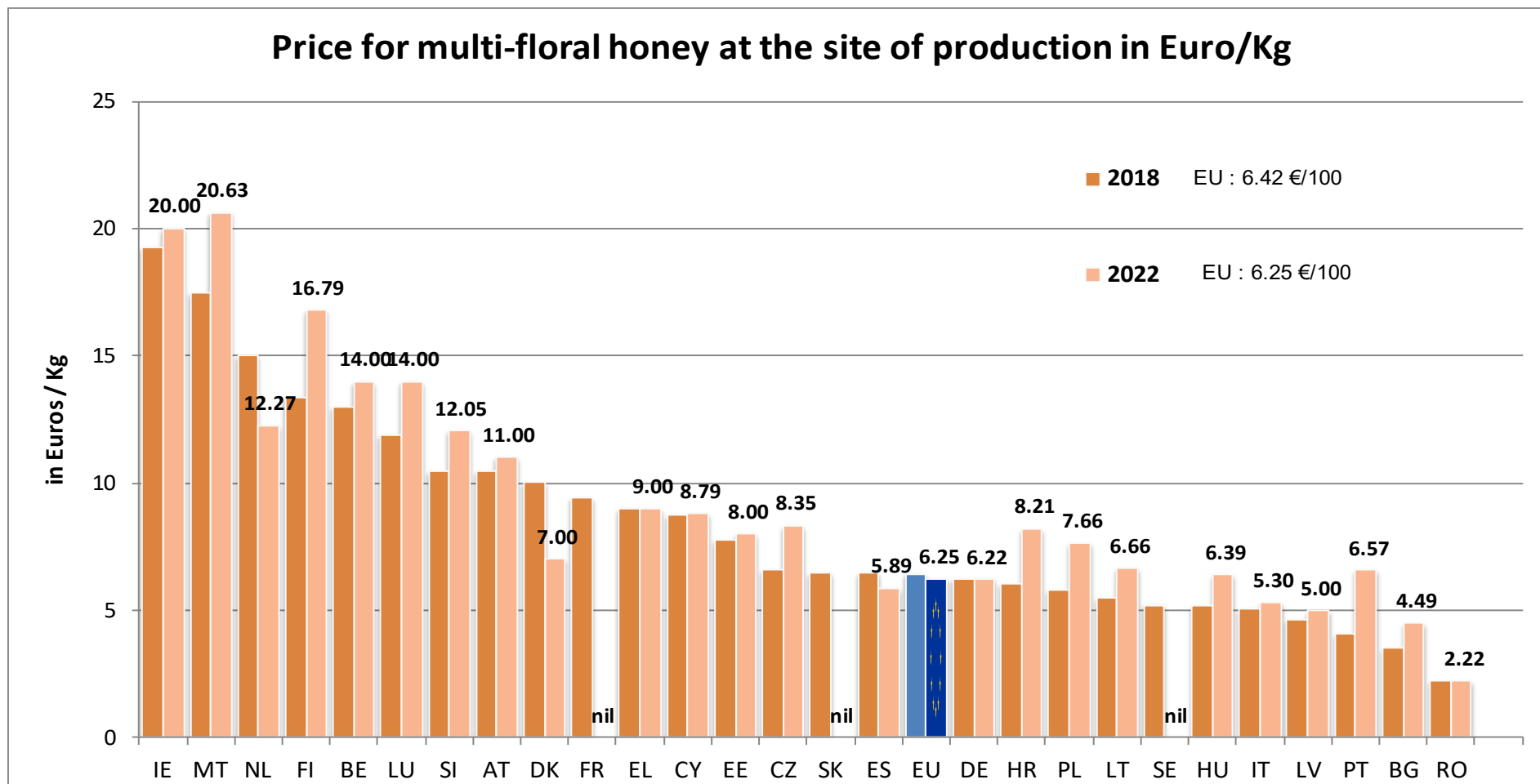
EU Honey Production



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



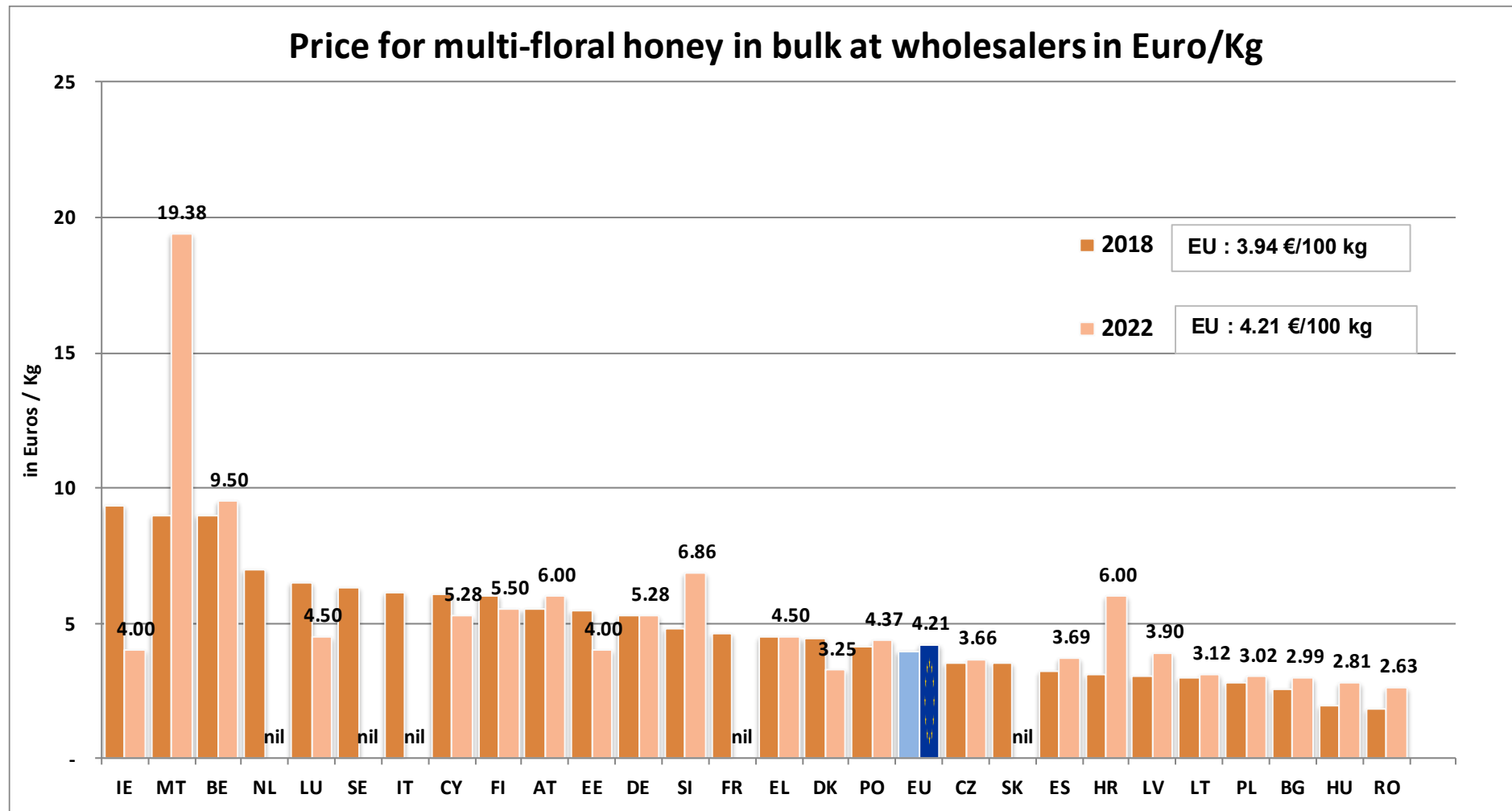
Honey price at production site



Source : Commission Implementing Regulation (EU)2022/1475



Honey price at wholesalers



Source : Commission Implementing Regulation (EU)2022/1475

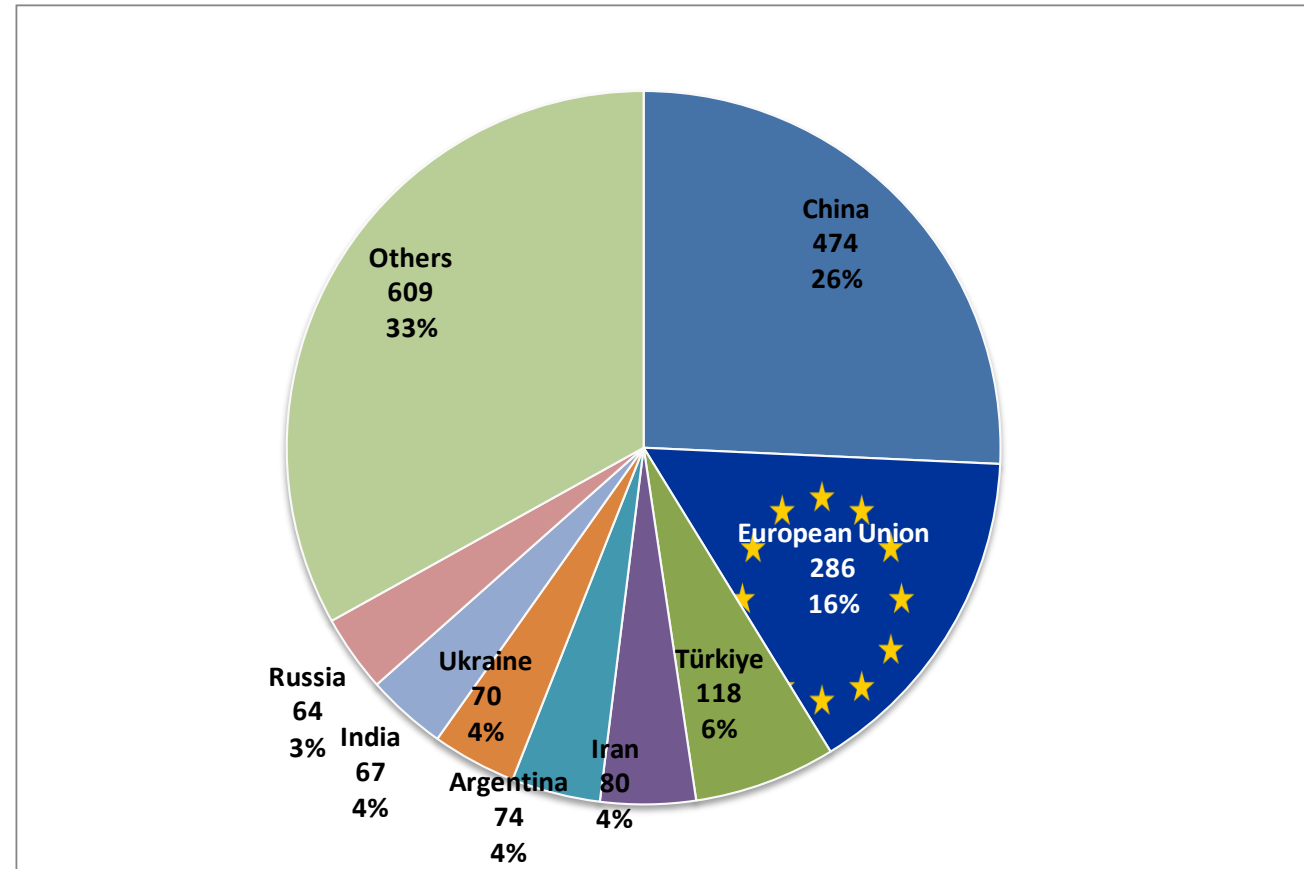


World Production of Honey per Country (1 000 T)



	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



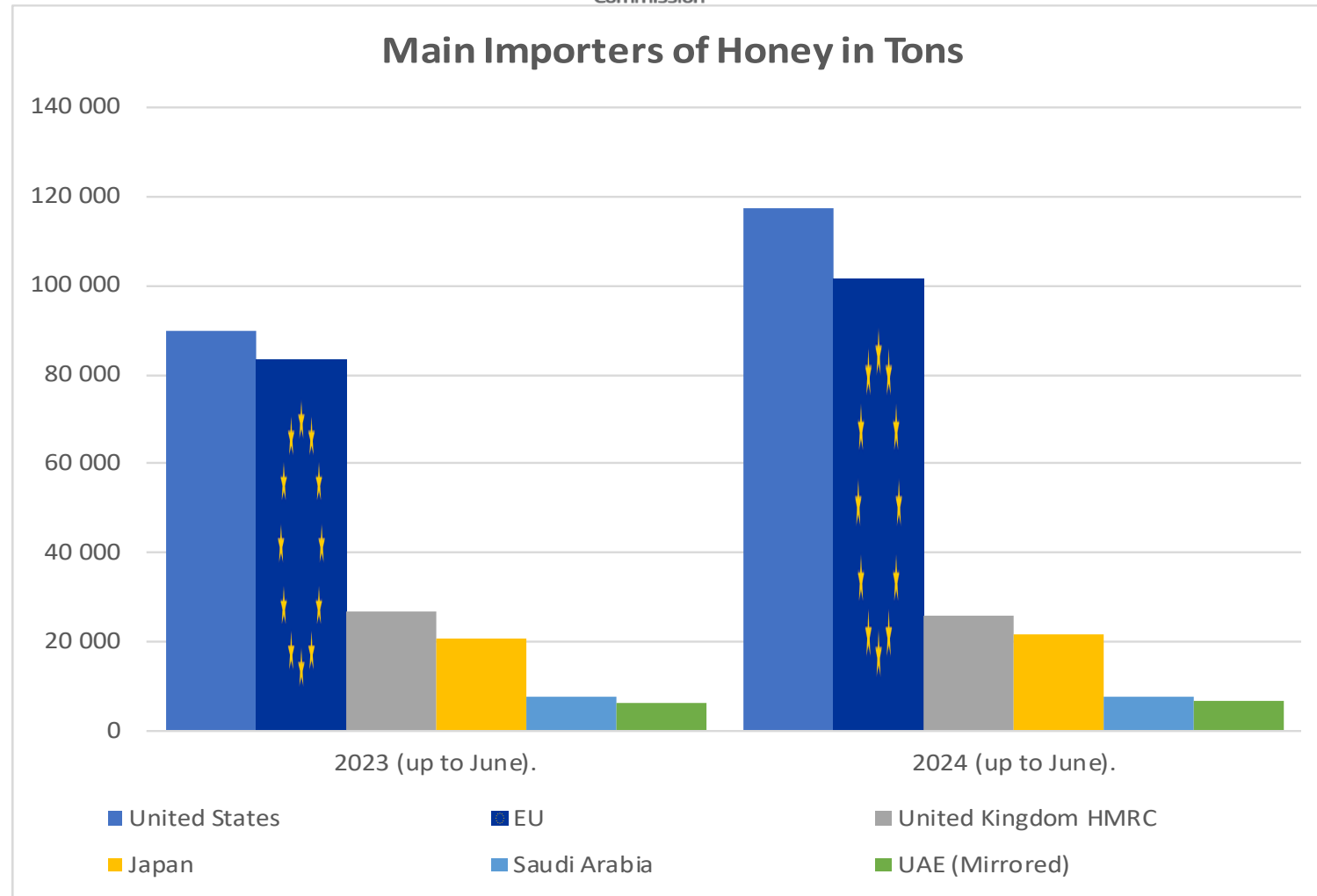
World Imports of Honey by Region



	2021		2022		2023		Share of World Imports in 2023	
	Tons	1 000 €	Tons	1 000 €	Tons	1 000 €	Tons	1 000 €
North America	228 271	562 501	216 201	756 480	206 576	551 689	32.6%	35.2%
<i>of which USA</i>	220 071	530 515	205 634	702 385	199 146	512 294	31.4%	32.7%
EU	173 514	406 805	190 445	504 379	163 707	359 247	25.8%	22.9%
Asia	158 819	352 393	146 434	354 328	136 206	289 584	21.5%	18.5%
<i>of which Japan</i>	47 132	143 515	47 276	159 263	41 924	133 786	6.6%	8.5%
<i>China</i>	4 809	89 392	3 726	67 671	3 747	58 853	0.6%	3.8%
Other European Countries	58 990	167 311	63 919	182 208	62 640	159 813	9.9%	10.2%
Near And Middle Eastern Countries	36 949	142 562	39 490	156 925	35 565	131 833	5.6%	8.4%
Africa	17 919	30 611	18 594	36 927	17 836	32 366	2.8%	2.1%
Oceania And Polar Regions	8 041	30 174	8 131	39 006	8 908	36 570	1.4%	2.3%
Central America And Caribbean	1 657	5 161	1 678	6 130	1 538	5 414	0.2%	0.3%
South America	986	5 260	581	1 986	350	1 015	0.1%	0.1%
Total	685 147	1 702 776	685 472	2 038 369	633 328	1 567 531		

Source : Trade Data Monitor

Main World Importers of Honey (Jan-Jun 2024/Jan-Jun 2023)



Source: Trade Data Monitor – preliminary data



EU Imports of Honey by Origin (in Tons)



In tons

	2021		2022		2023		Jan-Jun 24		Compared to Jan-Jun 23	
	% Extra EU		% Extra EU		% Extra EU		% Extra EU			
Ukraine	53 836	31.0%	46 093	24.2%	45 822	28.0%	40 627	40.1%	↑	+85.3%
China	48 139	27.8%	68 428	35.9%	60 177	36.8%	31 972	31.5%	↓	-6.6%
Argentina	14 396	8.3%	19 446	10.2%	20 450	12.5%	9 806	9.7%	↑	+10.2%
Mexico	15 486	8.9%	13 797	7.2%	10 731	6.6%	2 662	2.6%	↓	-42.4%
Chile	3 063	1.8%	3 609	1.9%	2 541	1.6%	2 431	2.4%	↑	+96.9%
Cuba	7 052	4.1%	6 571	3.5%	4 744	2.9%	2 130	2.1%	↓	-27.2%
Vietnam	905	0.5%	6 383	3.4%	4 697	2.9%	2 007	2.0%	↓	-7.6%
Türkiye	4 676	2.7%	7 472	3.9%	2 395	1.5%	1 745	1.7%	↑	+33.8%
Others	25 900	14.9%	18 629	9.8%	12 145	7.4%	8 015	7.9%	↑	+33.8%
Extra-EU	173 453		190 427		163 702		101 395		↑	+21.7%
% Change			↑ +9.8%			↓ -14.0%				

Source : Eurostat Comext

EU Imports of Honey by Origin (in Thousand Euros)



In Thousand Euros

	2021		2022		2023		Jan-Jun 24		Compared to Jan-Jun 23	
	% Extra EU		% Extra EU		% Extra EU		% Extra EU			
Ukraine	101 595	25.0%	121 079	24.0%	94 853	26.4%	70 721	37.1%	↑	+38.7%
China	65 739	16.2%	108 384	21.5%	83 674	23.3%	41 343	21.7%	↓	-14.2%
Argentina	39 411	9.7%	64 275	12.7%	48 400	13.5%	20 013	10.5%	↓	-16.7%
New Zealand	32 614	8.0%	32 640	6.5%	24 546	6.8%	12 788	6.7%	↑	+34.5%
Mexico	44 634	11.0%	50 597	10.0%	33 079	9.2%	7 295	3.8%	↓	-54.2%
Türkiye	11 826	2.9%	19 638	3.9%	8 153	2.3%	6 333	3.3%	↑	+30.9%
Chile	10 729	2.6%	14 548	2.9%	7 516	2.1%	5 958	3.1%	↑	+50.4%
Cuba	14 653	3.6%	17 464	3.5%	12 320	3.4%	4 611	2.4%	↓	-44.4%
Others	85 341	21.0%	75 637	15.0%	46 627	13.0%	21 643	11.3%	↓	-10.8%
Extra-EU	406 543		504 261		359 167		190 705		↑	+0.4%
% Change			↑ +24.0%			↓ -28.8%				

Source : Eurostat Comext

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



In tons

	2021		2022		2023		Jan-Jun 24		Compared to Jan-Jun 23	
		% Extra EU		% Extra EU		% Extra EU		% Extra EU		
DE	51 886	29.9%	52 034	27.3%	40 998	25.0%	26 167	25.8%	↑	+30.4%
BE	25 646	14.8%	33 245	17.5%	31 395	19.2%	15 994	15.8%	↓	-7.8%
ES	14 480	8.3%	18 158	9.5%	15 665	9.6%	10 793	10.6%	↑	+34.2%
PL	32 113	18.5%	27 348	14.4%	23 315	14.2%	10 600	10.5%	↓	-8.3%
FR	6 771	3.9%	6 475	3.4%	7 697	4.7%	6 339	6.3%	↑	+78.1%
NL	5 035	2.9%	9 750	5.1%	6 499	4.0%	5 951	5.9%	↑	+120.3%
PT	7 080	4.1%	10 115	5.3%	7 687	4.7%	5 195	5.1%	↓	-12.6%
IT	4 301	2.5%	7 079	3.7%	5 797	3.5%	3 635	3.6%	↑	+39.8%
CZ	3 832	2.2%	3 374	1.8%	1 838	1.1%	2 947	2.9%	↑	+822.4%
IE	2 467	1.4%	4 296	2.3%	4 608	2.8%	2 683	2.6%	↑	+23.1%
RO	4 126	2.4%	3 795	2.0%	3 557	2.2%	2 606	2.6%	↑	+14.4%
Others	15 778	9.1%	14 777	7.8%	14 648	8.9%	8 488	8.4%	↑	+26.8%
Extra-EU	173 514		190 445		163 707		101 397		↑	+21.7%
% Change			↑ +9.8%		↓ -14.0%					

Source : Eurostat Comext

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



In tons

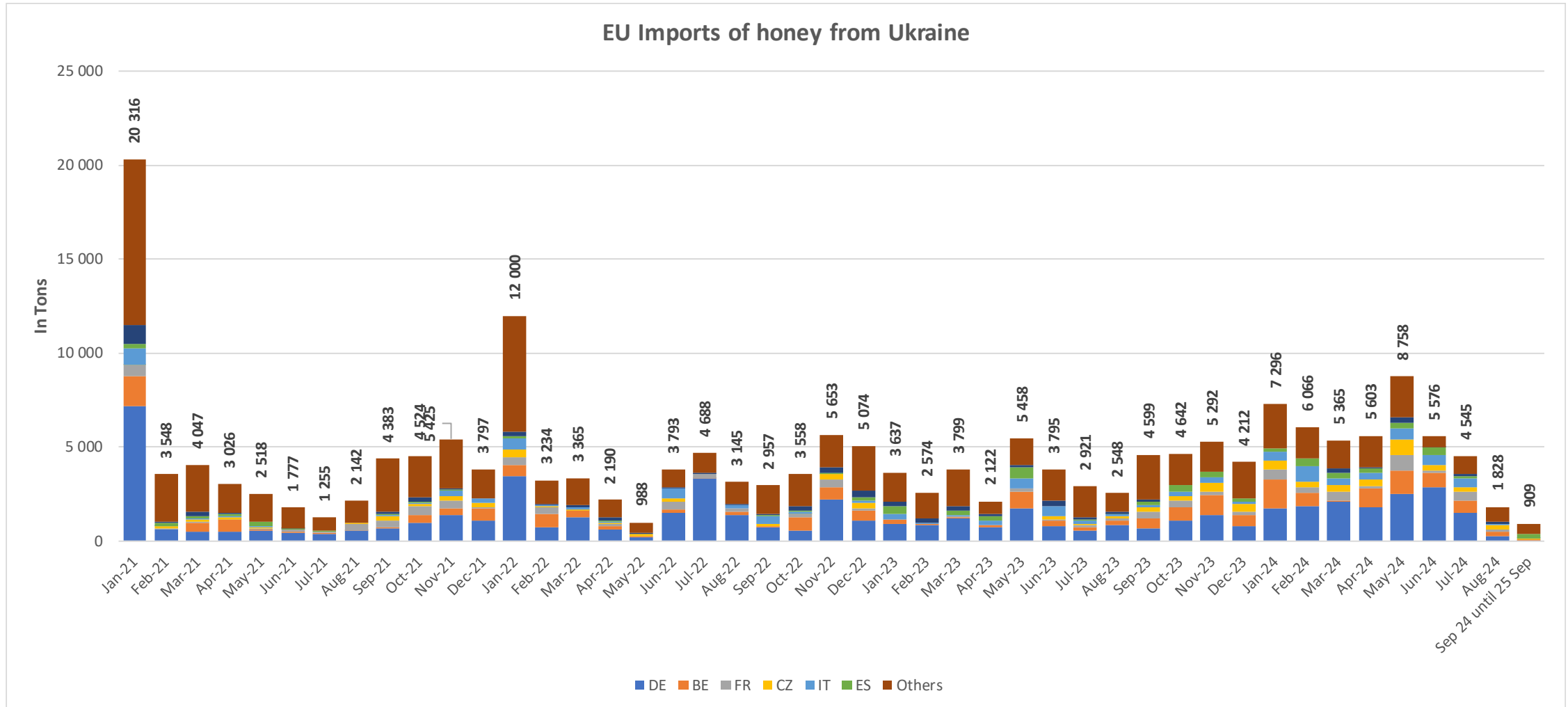
	2021		2022		2023		Jan-Jun 24		Compared to Jan-Jun 23	
		% Extra EU		% Extra EU		% Extra EU		% Extra EU		
DE	11 692	21.7%	11 738	25.5%	10 994	24.0%	12 617	31.1%	↑	+113.5%
FR	4 337	8.1%	4 298	9.3%	4 998	10.9%	5 343	13.2%	↑	+206.9%
PL	16 918	31.4%	10 591	23.0%	9 478	20.7%	4 959	12.2%	↑	+19.5%
ES	1 863	3.5%	2 280	4.9%	2 789	6.1%	3 239	8.0%	↑	+93.9%
BE	6 225	11.6%	3 850	8.4%	1 990	4.3%	2 738	6.7%	↑	+80.4%
IT	1 294	2.4%	2 371	5.1%	2 745	6.0%	2 481	6.1%	↑	+109.6%
CZ	2 673	5.0%	2 412	5.2%	1 513	3.3%	2 437	6.0%	↑	+962.7%
RO	1 169	2.2%	536	1.2%	2 517	5.5%	1 856	4.6%	↑	+25.0%
GR	-	0.0%	516	1.1%	2 583	5.6%	1 509	3.7%	↑	+128.5%
DK	1 614	3.0%	1 082	2.3%	1 504	3.3%	785	1.9%	↑	+27.0%
HU	1 806	3.4%	1 842	4.0%	1 574	3.4%	735	1.8%	↓	-40.4%
BG	518	1.0%	973	2.1%	1 060	2.3%	732	1.8%	↑	+66.2%
AT	428	0.8%	435	0.9%	635	1.4%	475	1.2%	↑	+29.1%
HR	122	0.2%	62	0.1%	371	0.8%	309	0.8%	↑	+406.8%
NL	432	0.8%	721	1.6%	253	0.6%	288	0.7%	↑	+39.7%
LT	1 630	3.0%	884	1.9%	407	0.9%	103	0.3%	↓	-35.3%
SI	41	0.1%	41	0.1%	62	0.1%	21	0.1%	↓	-49.8%
EE	79	0.1%	20	0.0%	-	0.0%				
IE	-	0.0%	-	0.0%	0	0.0%			→	+0.0%
SK	996	1.9%	1 441	3.1%	351	0.8%			↓	-100.0%
LV	-	0.0%	-	0.0%	-	0.0%				
Grand Total	53 836	100.0%	46 093	100.0%	45 822	100.0%	40 627		↑	+85.3%
Extra-EU	53 836		46 093		45 822		40 627		↑	+85.3%
% Change			↓ -14.4%		↓ -0.6%					

Source : Eurostat Comext



EU Imports from Ukraine by Member State (in Tons)

! preliminary data !



DG AGRI E3, source: TAXUD surveillance – preliminary data

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



	2019	2020	2021	2022	2023	Jan-Jun 2024	Compared to Jan-Jun 2023
Ukraine	1.68	1.53	1.89	2.63	2.07	1.75	↓ -15.4%
China	1.40	1.38	1.37	1.58	1.39	1.28	↓ -7.6%
Argentina	2.28	2.20	2.74	3.31	2.37	2.04	↓ -13.8%
Mexico	2.56	2.22	2.88	3.67	3.08	2.73	↓ -11.5%
Chile	2.71	2.72	3.50	4.03	2.96	2.43	↓ -17.9%
Cuba	2.11	1.83	2.08	2.66	2.60	2.18	↓ -15.9%
Vietnam	1.39	1.33	1.69	2.01	1.70	1.44	↓ -15.1%
Türkiye	3.45	3.33	2.53	2.63	3.40	3.60	↑ +5.7%
Moldova	2.69	2.26	3.24	3.57	3.27	2.16	↓ -33.9%
India	1.66	1.70	1.70	1.77	1.68	1.55	↓ -7.8%
Brazil	2.67	2.17	2.77	3.61	3.22	2.65	↓ -17.9%
Russia	2.17	2.16	2.11	2.06	1.70	1.43	↓ -16.0%
United Kingdom	4.29	4.23	4.13	4.34	4.48	4.14	↓ -7.7%
New Zealand	28.51	29.12	28.07	21.06	29.32	27.80	↓ -5.2%
Uruguay	1.99	1.78	2.69	3.27	2.43	2.07	↓ -14.7%
Nicaragua	3.06	2.75	3.13	3.92	3.44	3.38	↓ -1.9%
Guatemala	2.31	2.44	3.30	4.18	3.00	2.38	↓ -20.7%
Extra EU	2.13	2.06	2.34	2.65	2.19	1.89	↓ -13.7%
Extra EU (excl. NZ)	2.02	1.89	2.17	2.50	2.05	1.77	↓ -14.0%

Source : Eurostat Comext

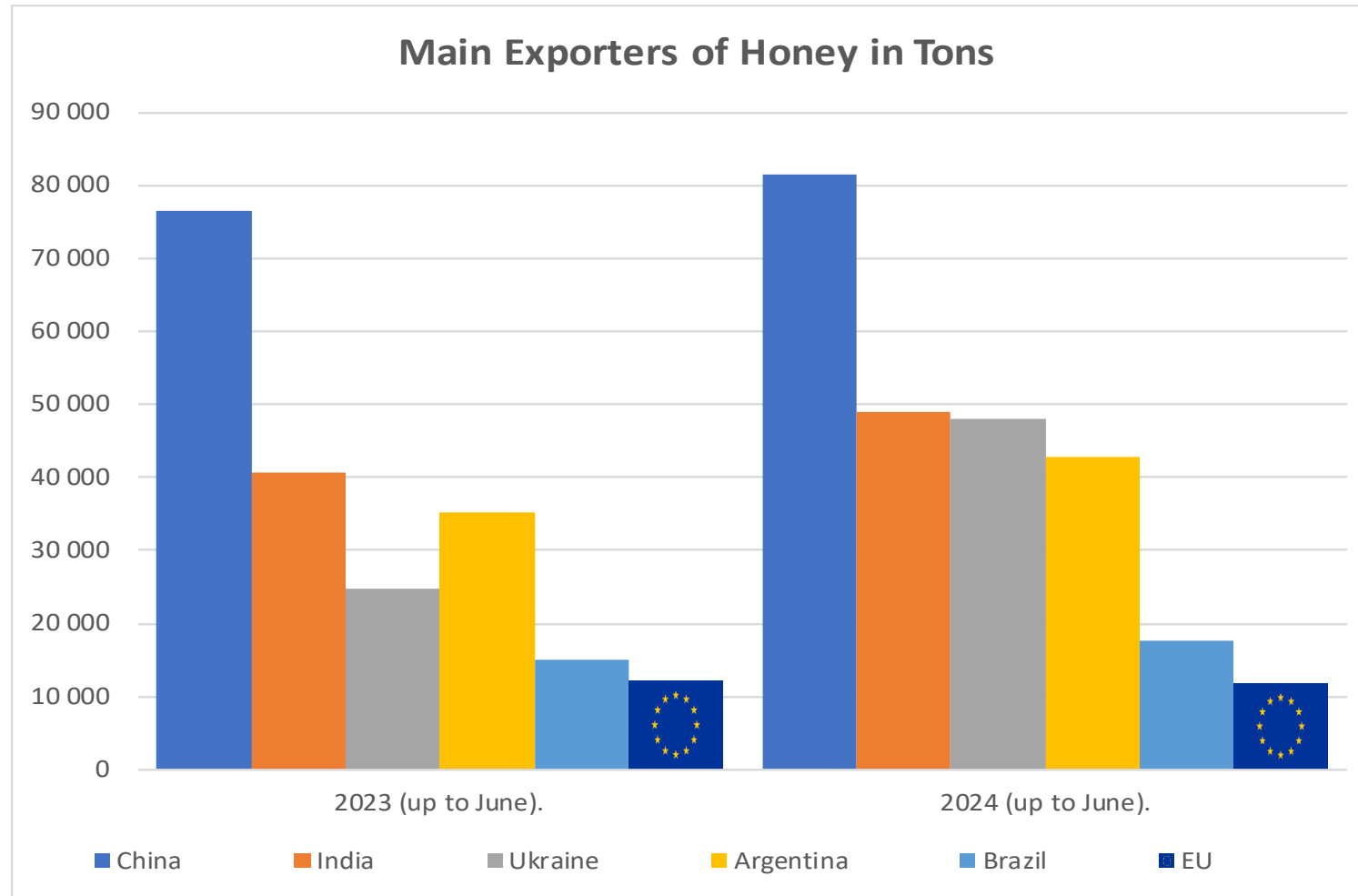
World Exports of Honey by Region



	2021		2022		2023		Share of World Exports in 2023	
	Tons	1 000 €	Tons	1 000 €	Tons	1 000 €	Tons	1 000 €
Asia	330 546	483 554	294 631	580 734	298 729	474 991	51.4%	31.7%
<i>of which China</i>	145 886	220 416	155 921	262 949	152 636	235 197	26.3%	15.7%
South America	126 596	362 984	124 339	417 199	114 642	274 114	19.7%	18.3%
Other European Countries	80 997	199 267	76 444	221 513	73 385	176 227	12.6%	11.8%
Central America And Caribbean	44 200	130 138	44 534	134 039	29 472	67 558	5.1%	4.5%
EU	25 425	146 437	25 031	151 910	24 879	146 036	4.3%	9.8%
North America	16 183	55 233	21 254	85 679	16 275	58 815	2.8%	3.9%
<i>of which USA</i>	8 652	24 322	10 100	30 877	8 885	25 041	1.5%	1.7%
<i>Canada</i>	7 531	30 911	11 155	54 802	7 391	33 774	1.3%	2.3%
Oceania And Polar Regions	16 856	312 859	15 560	292 441	14 424	258 934	2.5%	17.3%
Near And Middle Eastern Countries	9 966	47 445	7 661	41 279	5 303	28 547	0.9%	1.9%
Africa	3 534	13 928	5 716	17 900	4 139	12 579	0.7%	0.8%
Total	654 303	1 751 844	615 171	1 942 695	581 248	1 497 802		

Source : Trade Data Monitor

Main World Exporters of Honey (Jan-Jun 2024/Jan-Jun 2023)



Source: Trade Data Monitor – preliminary data



EU Exports of Honey by Destination (in Tons)



In tons

	2021		2022		2023		Jan-Jun 24		Compared to Jan-Jun 23	
	% Extra EU		% Extra EU		% Extra EU		% Extra EU			
United Kingdom	4 577	18.2%	4 551	18.4%	4 362	17.8%	2 328	20.0%	↑	+1.3%
USA	2 793	11.1%	3 184	12.9%	3 284	13.4%	2 010	17.3%	↑	+33.0%
Switzerland	3 908	15.6%	3 894	15.7%	3 350	13.7%	1 586	13.6%	↓	-5.4%
Saudi Arabia	3 305	13.2%	2 433	9.8%	3 546	14.4%	1 014	8.7%	↓	-39.7%
Canada	1 344	5.4%	1 295	5.2%	918	3.7%	827	7.1%	↑	+169.8%
Japan	2 130	8.5%	2 809	11.3%	2 531	10.3%	818	7.0%	↓	-38.4%
Israel	613	2.4%	980	4.0%	1 295	5.3%	478	4.1%	↓	-6.0%
U.A.Emirates	932	3.7%	912	3.7%	745	3.0%	455	3.9%	↓	-7.2%
Others	5 495	21.9%	4 692	19.0%	4 512	18.4%	2 124	18.2%	↓	-7.9%
Extra-EU	25 097		24 750		24 543		11 639		↓	-3.9%
% Change			↓ -1.4%			↓ -0.8%				

Source : Eurostat Comext

EU Exports of Honey by Destination (in Thousand Euros)



In Thousand Euros

	2021		2022		2023		Jan-Jun 24		Compared to Jan-Jun 23	
	% Extra EU		% Extra EU		% Extra EU		% Extra EU			
United Kingdom	22 579	15.6%	23 320	15.5%	22 810	15.8%	11 855	17.8%	↑	+1.7%
USA	18 634	12.9%	20 580	13.7%	20 194	14.0%	11 529	17.3%	↑	+22.6%
Switzerland	22 756	15.7%	24 622	16.4%	22 710	15.8%	9 896	14.8%	↓	-11.1%
Saudi Arabia	19 975	13.8%	17 161	11.4%	23 887	16.6%	7 050	10.6%	↓	-40.2%
Japan	14 650	10.1%	18 464	12.3%	14 940	10.4%	5 286	7.9%	↓	-31.8%
U.A.Emirates	7 547	5.2%	7 447	5.0%	5 930	4.1%	3 424	5.1%	↓	-14.2%
Canada	5 478	3.8%	5 969	4.0%	3 943	2.7%	3 173	4.8%	↑	+118.0%
Israel	1 719	1.2%	3 032	2.0%	3 401	2.4%	1 372	2.1%	↓	-4.3%
Others	31 411	21.7%	29 575	19.7%	26 252	18.2%	13 063	19.6%	↓	-3.1%
Extra-EU	144 750		150 170		144 068		66 648		↓ -7.6%	
% Change			↑ +3.7%			↓ -4.1%				

Source : Eurostat Comext

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



In tons

	2021		2022		2023		Jan-Jun 24		Compared to Jan-Jun 23	
		% Extra EU		% Extra EU		% Extra EU		% Extra EU		
ES	6 922	27.2%	6 791	27.1%	7 128	28.6%	3 120	26.4%	↓	-1.9%
DE	6 303	24.8%	5 191	20.7%	5 513	22.2%	2 916	24.7%	↑	+5.0%
PL	980	3.9%	1 598	6.4%	1 199	4.8%	876	7.4%	↑	+35.2%
GR	1 160	4.6%	1 268	5.1%	1 474	5.9%	748	6.3%	↑	+13.0%
FR	1 749	6.9%	1 606	6.4%	1 313	5.3%	674	5.7%	↑	+1.2%
HU	1 756	6.9%	2 242	9.0%	1 578	6.3%	493	4.2%	↓	-44.5%
RO	916	3.6%	1 349	5.4%	1 745	7.0%	466	3.9%	↓	-51.1%
IT	762	3.0%	1 007	4.0%	930	3.7%	432	3.7%	↓	-4.4%
AT	926	3.6%	854	3.4%	845	3.4%	344	2.9%	↓	-26.5%
BG	707	2.8%	547	2.2%	489	2.0%	320	2.7%	↑	+38.3%
BE	723	2.8%	402	1.6%	427	1.7%	294	2.5%	↑	+18.1%
Others	2 522	9.9%	2 177	8.7%	2 237	9.0%	1 116	9.5%	↑	+0.6%
Total EU	25 426		25 032		24 879		11 798		↓	-3.9%
% Change			↓ -1.5%		↓ -0.6%					

Source : Eurostat Comext

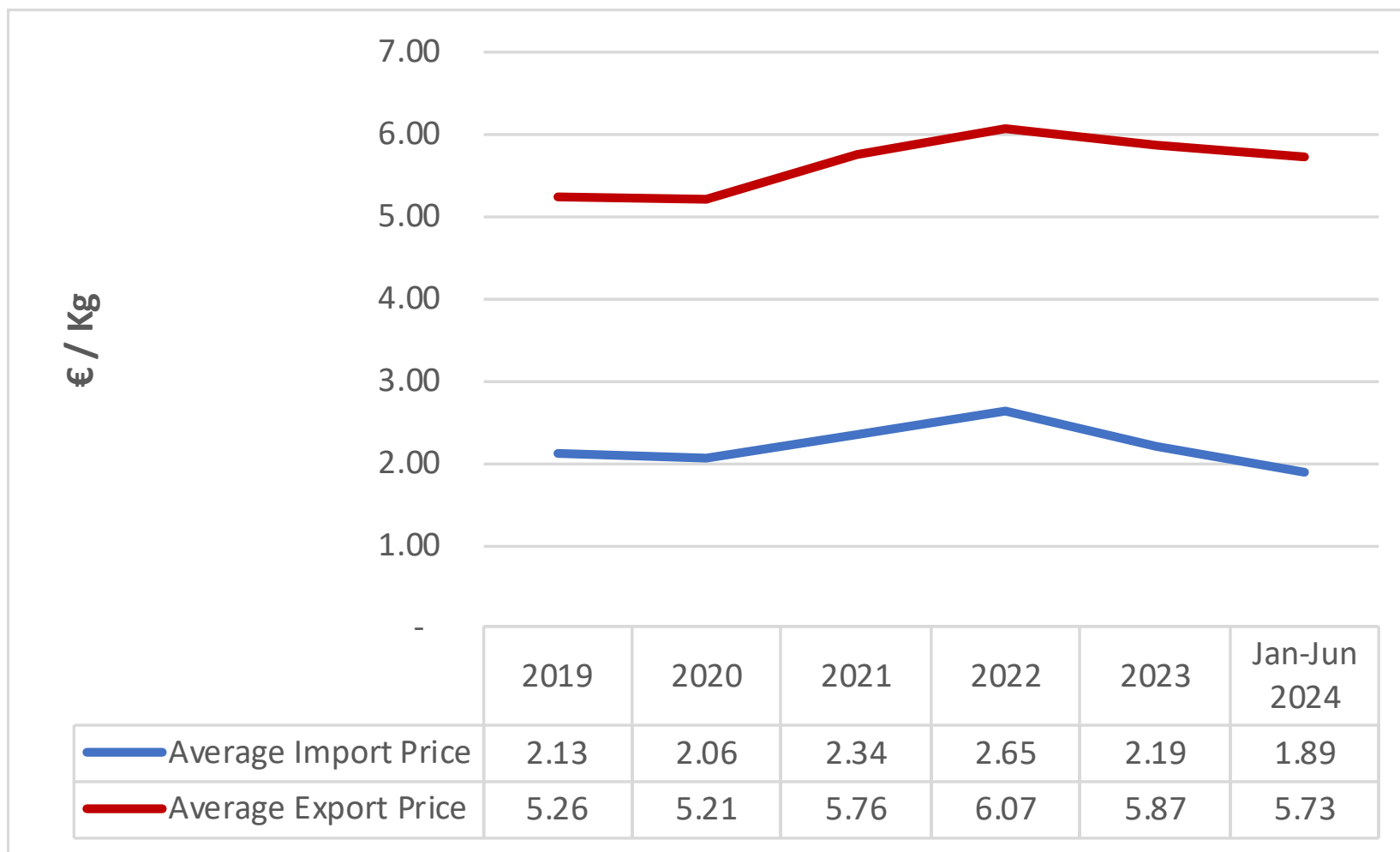
EU Average Unit Value of Exported Honey (€/kg) by Destination



	2019	2020	2021	2022	2023	Jan-Jun 2024	Compared to Jan-Jun 2023
United Kingdom	3.98	3.75	4.93	5.12	5.23	5.03	↓ -3.7%
USA	6.29	5.77	6.67	6.46	6.15	5.87	↓ -4.5%
Switzerland	5.41	5.68	5.82	6.32	6.78	6.24	↓ -8.0%
Saudi Arabia	7.53	6.43	6.04	7.05	6.74	6.64	↓ -1.5%
Japan	5.75	6.53	6.88	6.57	5.90	6.35	↑ +7.6%
Canada	3.89	3.85	4.08	4.61	4.30	3.85	↓ -10.4%
Israel	2.84	2.82	2.81	3.09	2.63	2.94	↑ +12.1%
U.A.Emirates	7.51	7.72	8.10	8.16	7.96	7.68	↓ -3.6%
Morocco	2.80	2.57	3.43	4.00	3.11	3.17	↑ +2.0%
Philippines	6.00	5.88	6.36	6.11	6.69	6.26	↓ -6.4%
Bosnia-Herz.	4.78	4.58	4.07	4.22	4.81	5.37	↑ +11.7%
Norway	5.40	5.65	6.72	7.01	6.50	5.81	↓ -10.6%
Hong Kong	6.98	6.79	6.62	7.67	7.96	8.18	↑ +2.8%
Jordan	4.86	4.79	5.42	6.43	5.74	5.81	↑ +1.2%
South Africa	2.29	2.41	13.33	10.10	2.88	3.13	↑ +8.4%
Iceland	4.58	4.54	4.48	5.80	6.14	6.12	↓ -0.3%
Kuwait	9.45	12.57	12.34	10.63	10.02	10.45	↑ +4.3%
Extra EU	5.26	5.21	5.77	6.07	5.87	5.74	↓ -2.2%

Source : Eurostat Comext

Import and Export Unit Values



Summary of EU honey market situation (1)



- EU remains second world producer (~286 000 tons, 2022) after China
- Longer term increase in number of beehives came to a halt 2023 (~20 millions)



Summary of EU honey market situation (2)



- EU remains only ~63% self-sufficient in honey
- Imports needed to cover EU domestic consumption
- Ukraine takes the first position as the key EU's supplier, overtaking China in 2024
- 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

Thank you



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