



CBI
Ministry of Foreign Affairs

CBI Product Factsheet:

Monofloral Honey in the UK

Introduction

Monofloral honey is very popular in the United Kingdom (UK), since consumers like to diversify their honey consumption. This provides great opportunities for exporters in developing countries to add value to their product. Of course, labelling your honey as 'monofloral' requires specific production methods and appropriate validation.

Product description

Monofloral honey refers to honey made from nectar collected from one particular flower variety. This, however, does not mean that such honey does not contain elements from other floral varieties. Monofloral honey might contain nectar of various other flowers, but the nectar from the main sources is dominant.

Production of monofloral honey is only possible under the following two conditions:

- The target nectar origin must be dominant in the area. Bees must have few alternatives for nectar collection. Additionally, beekeepers must prepare the hives and colonies for collection of this nectar, including the removal of any other honey to avoid 'contamination' by other nectars.
- The beekeeper must coordinate the timing between the introduction of the beehive and the harvesting. They must coincide with the blooming period of the specific plant. This is possible through careful observation of the blooming period of the target nectar source and overlapping blooming periods of other nectar-producing plants.

Monofloral honey is increasingly becoming popular in the UK, where consumers appreciate single-origin honeys such as Acacia honey. Acacia honey has a mild taste and light colour which matches general consumer preferences. Other varieties, such as Manuka and buckwheat honeys, are also very popular, offering great opportunities for developing country exports. Manuka honey is highly valued for its antibacterial properties, as has been substantiated by scientific research.

Quality

Monofloral honey must comply with the quality specifications as established in EU [Directive 110/2001](#) and described in [CBI's Buyer requirements for honey](#). Particularly compliance with moisture content limits is a challenge. Beekeepers often have to harvest their monofloral honey crop before the bees start collecting nectar from other sources. This frequently results in the harvesting of unripe honey with a moisture content that exceeds 20%.

In addition to compliance with the above-mentioned specifications, monofloral honeys need to comply with industry standards. However, industry standards are not available for all types of monofloral honeys. Moreover, they are not recognised as standards by all importers in the UK. Exporters must always verify with their buyers which specifications they require to ensure compliance.

In order to determine the flower origin of a certain honey, the method of pollen analysis is frequently used by the honey industry, where the amount of pollen identified can determine whether a honey is of a certain origin. To help with this analysis, pollens are classified into three categories:

- Underrepresented pollen (with less than 20,000 pollen grains per 10 grams of honey)
- Normally represented pollen (with 20,000 - 100,000 pollen grains per 10 grams of honey)
- Overrepresented pollen (with more than 100,000 pollen grains per 10 grams).

Following this classification, different levels of pollen need to be identified in a honey sample in order for the honey to be called monofloral:

- Underrepresented pollen (e.g. coffee) must constitute more than 20% of the total pollen content
- Normally represented pollen (e.g. clover) must constitute more than 45% of the total pollen content
- Overrepresented pollen (e.g. rapeseed) must constitute more than 70% of the total pollen content.

Other methods to identify the origin of a honey include measurement of: colour, conductivity and sugar spectrums.

Labelling

Labels of monofloral honey exported to the United Kingdom (UK) must include the following information:

- The common name or the botanical name of the floral source of the honey must be in close proximity to the word "honey"
 - Name of the exporter
 - Gross and net weight
 - Date of minimum durability – 'best before'
 - Any special conditions for keeping or use

- The name and address of the manufacturer, packager or importer established in the EU
- Country of origin or provenance
- Lot marking with the marking preceded by the letter "L"
- Drum number (if exported in bulk)

Packaging

Honey which is imported to Germany and is intended for industrial use is transported in bulk. Common packaging consists of steel or plastic drums of 200 litres. The drums must be painted on the outside and lined on the inside. Depending on buyer preferences, you can use beeswax or plastic bags (e.g. polyethylene) for lining.

German buyers strongly prefer steel drums over plastic drums because of handling and quality. Due to the weight of honey, plastic drums may collapse when stacked. In practice, this also means that storage of plastic drums requires more space. Moreover, importers' equipment is not always suitable for plastic, which may break as it is less durable. Plastic is also more permeable, which means that honey is more easily contaminated by, for example, materials/liquids on the floor.

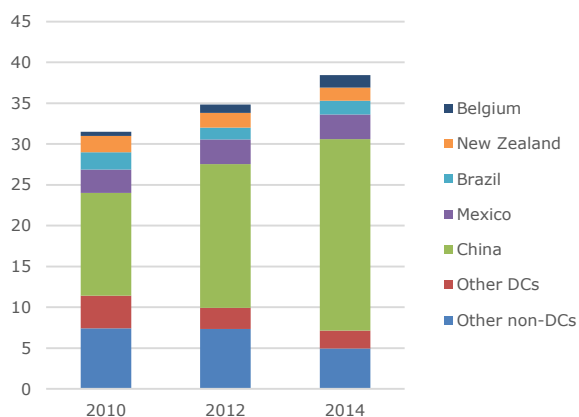
Tip:

Make sure you have detailed packaging instructions from your buyer, as their preferences may differ from your standard packaging.

What is the demand for monofloral honey in the UK?

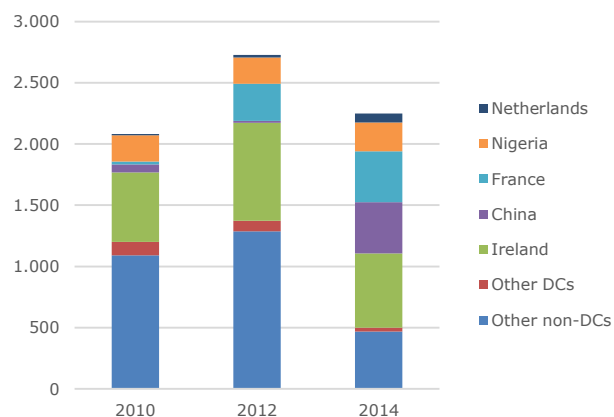
Since quantitative data for monofloral honey are not available, data on the overall UK honey market as presented below will be complemented by a qualitative analysis of the UK monofloral honey market.

Figure 1: Main suppliers of natural honey to the UK, 2010-2014, volume in 1,000 tonnes



Source: Eurostat, 2015

Figure 2: Main destinations of UK honey, 2010-2014, volume in tonnes



Source: Eurostat, 2015

Increasing importance of developing country suppliers:

During 2010 and 2014, honey imports destined for the UK market increased by 5% annually, amounting to 38,000 tonnes in 2014 (€96 million). Over the past years, the largest supplier of honey to the UK has been China, representing a share of 61% (in terms of volume) of total honey imports. China can supply steady quantities of honey at a low price. Moreover, China is an important supplier of monofloral honeys such as acacia and rape seed honey. Eastern European countries such as Romania and Hungary are also major suppliers of acacia honey.

The decrease in UK honey production has resulted in increased opportunities for developing country honey exporters. In fact, in terms of volume, imports from developing countries have been growing by 9% annually. Besides China, other important developing country suppliers include Mexico (8% share of total imports) and Brazil (4% of total imports). Mexico is a source of high quality polyfloral honey, but also of several monofloral honeys, such as orange blossom. New Zealand is also a major supplier of monofloral honey (mainly Manuka honey), which is highly appreciated in the UK. The bulk of the

honey imported from New Zealand is estimated to comprise Manuka honey, which amounted to 1.6 thousand tonnes in 2014.

Tip:

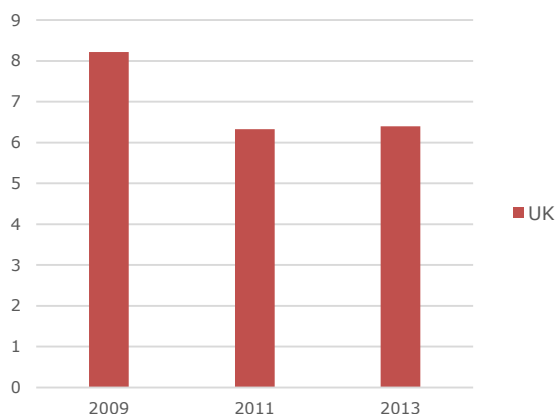
- Avoid direct competition on price with Chinese suppliers by distinguishing your product in terms of quality or distinguishing your company.

Considerable fluctuation of exports:

During the same period, UK honey exports fluctuated significantly, amounting to more than 2,000 tonnes (€16 million) in 2014. After an increase in exports between 2010 and 2012, UK honey exports fell during 2012 and 2014. However, it is interesting to note that in terms of value, exports did not demonstrate a decrease of similar level, indicating an increase in the export price of honey. Although the main destinations of UK exports are other EU markets, a considerable volume of honey is destined for developing countries such as China (19% of total exports) and Nigeria (11% of total exports).

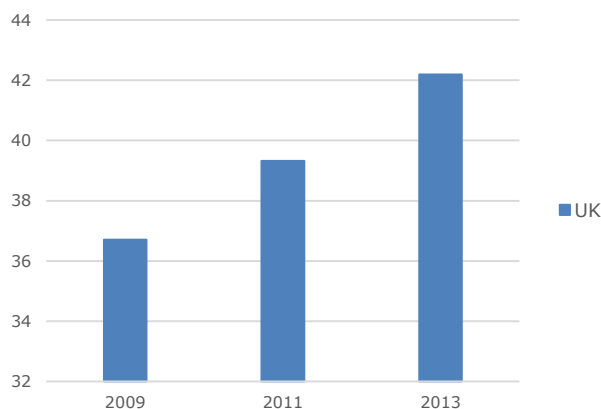
Since production data are not available for 2014, both production and consumption were calculated for the years 2009, 2011 and 2013.

Figure 3: Production of natural honey in UK, 2009-2013, volume in 1,000 tonnes



Source: Eurostat (2015)

Figure 4: Apparent consumption of natural honey in the UK, 2009-2013, volume in 1,000 tonnes



Source FAOSTAT, Eurostat (2015)

Stable honey production:

After a significant decrease in honey produced by UK beekeepers between 2009 and 2011, honey production in the UK remained stable at 6,000 tonnes in 2013. The substantial drop was mainly attributed to the decrease in bee colonies, which has been partly caused by the chronic exposure of bees to agrochemicals. The efforts of UK beekeepers to enhance the health and wellbeing of bee colonies have contributed to a stabilisation of honey production in the UK.

According to the British Beekeepers Association, in 2014, British beekeepers achieved a 28% increase in the yield per bee colony compared to 2013 ([BBKA, 2014](#)), which suggests a considerable increase in honey production per hive.

In terms of monofloral production, the UK is a significant producer of heather honey, borage honey, rapeseed honey and apple blossom honey.

Substantial increase in consumption:

Honey consumption in the UK has been increasing continuously since 2009, amounting to more than 42 thousand tonnes in 2013. Since honey production has been decreasing, the consumers’ needs are covered by increased imports.

Monofloral honeys account for an estimated share of 10-20% of the total UK honey market or 4,000-8,000 tonnes. In supermarkets, 20-40% of the honey range comprises monofloral honey. However, in terms of absolute volume, the polyfloral honeys are sold more.

Table 1: Amount of monofloral honeys in UK supermarkets as percentage of total honeys available in their online shops

Major supermarkets	Share of monofloral honey
Waitrose	44%
TESCO	35%
Sainsbury's	31%
Morrisons	17%
Asda	18%

Source: ProFound, 2015

Acacia and Manuka honeys are some of the most popular monofloral honeys in the United Kingdom. While acacia and Manuka honey can be considered mainstream products, many other monofloral honeys such as rubber honey are niche products. In general, demand for monofloral honeys far exceeds supplies. Therefore, prices of monofloral honeys fetch large price premiums of up to 100% and more.

Especially in leading EU honey markets such as the UK, demand for monofloral honey is increasing at estimated annual rates of 5-15%. Consumers are becoming more interested in honeys with special flavours that can be attributed to their floral origins.

While general demand for monofloral honeys is strong, willingness of consumers to pay the high price premiums depends largely on taste, appearance and their knowledge of the floral source. This explains why fewer consumers may be interested in a honey with a strong unique taste from an indigenous Vietnamese plant than in mild, light acacia honey.

Refer to [CBI Trade Statistics for honey in the EU](#) for more information.

What trends offer opportunities on the UK market for monofloral honey?

Product innovation:

The UK honey market is a highly innovative market, where new products are adopted relatively fast by the consumers. The most characteristic example of this openness is Manuka honey. Manuka honey is produced in New Zealand by bees that pollinate the native Manuka bush and is considered to have antibacterial and anti-inflammatory properties. Its colour is dark and it has a very rich flavour. Even though its characteristics (flavour, taste) do not match the usual preferences of UK consumers, the majority of Manuka honey which enters the EU is consumed in the UK.

Additionally, the UK is the largest market for niche products such as Fairtrade honey and African honey. [Tropical Forest Products](#) is one of the pioneers with African honeys in the UK. The early adoption of these niche products shows that the UK is a highly innovative market which presents great opportunities to exporters of diverse monofloral honeys.

Tip:

- Develop a story focusing on the region or plant of origin which may give your honey a unique colour or flavour. Promoting your honey's unique characteristics is essential for its positioning in the UK market.

Popular flavours:

In general, consumers are more easily convinced to try new honeys when its properties are similar to those of honeys that have already been available for a long time, such as heather honey. Heather honey is produced in the UK and has a darker colour and a stronger taste compared to many other honeys such as acacia honey.

Consumer familiarity with darker and richer honeys means that there is somewhat more space in the UK market compared to other European markets for honey from developing countries which can be darker and have a stronger flavour. Still, only few consumers will want to try out strong flavoured honeys from distant countries.

Tip:

- In your promotion, compare your honey to known honeys with a similar flavour that is already available in the UK.

Refer to [CBI Trends for honey in the EU](#) for more information.

What legal and non-legal requirements must my product comply with?

Complying with the following requirements is mandatory. Failure to demonstrate compliance to your buyer may jeopardise your entry into the German market.

EU food legislation:

Honey is predominantly used as food and thus the EU regulation for food applies here. The basis for all food legislation is set in the EU General Food Law ([Regulation \(EC\) 178/2002](#)), which is mandatory for all Member States. The legislation introduces general principles for food production, such as traceability, risk analysis and a precautionary approach. The legislation also sets out responsibilities and requirements for food business operators.

Tip:

- Familiarise yourself with the relevant regulation. Refer to the [EU Export Helpdesk](#) for more information.

Food safety:

EU legislation on hygiene of foodstuffs ([Regulation \(EC\) 852/2004](#)) is legally binding for business operators, such as honey processors. They must comply with General Hygiene Requirements, such as a clean production environment and personnel trained in hygienic handling of honey. They must also implement procedures based on Hazard Analysis Critical Control Point (HACCP) principles. Nevertheless, certification of HACCP is not a legal requirement. Additional documentation, such as health certificates, may be needed for customs.

Tip:

- UK buyers will often require their suppliers to implement a food (safety) management system based on HACCP principles. Read more about HACCP and health control in the EU Export Helpdesk. To help you answer key questions about health control, refer to the [guidance document](#) of the EU.

Traceability:

In the case of food safety problems, EU legislation requires that consumers are informed and products are taken off the market. In order to enable this, the affected products must be identifiable and located quickly through a traceability system. The General Food Law requires EU food business operators, such as honey importers, to be able to identify each supplier of every batch of products. To this end, importers require their suppliers to label every batch. In case of a safety problem, members of the Rapid Alert System For Food ([RASFF](#)) network must inform the European Commission, which notifies the public.

Tip:

- Search in the EU's Rapid Alert System for Food and Feed (RASFF) [database](#) to see examples of withdrawals from the market and the reasons behind these withdrawals.

UK honey legislation:

Since 2003, the United Kingdom has introduced regulations for honey which is traded and consumed within the country's borders. The [Honey \(England\) Regulations 2003](#) set rules for honey products' definitions, labelling requirements and quality standards, including fructose and glucose content, moisture content and other parameters.

Tip:

- Make sure you comply with the specific UK regulations for honey, as UK honey importers will require your compliance.

What additional requirements do buyers often have?

The requirements listed below are common in Germany. Most of your competitors already comply with these requirements.

Monofloral honeys:

International Standards for honey are set by the Codex Alimentarius (administered by the "Joint FAO/WHO Food Standards Programme") and are used as guidelines by the honey industry. Specifically for monofloral honeys, the [guidelines](#) clearly mention that: 'Honey may be designated according to floral or plant source if it comes wholly or mainly from that particular source and has the organoleptic, physicochemical and microscopic properties (our emphasis) corresponding with that origin'. Practically, this means that UK importers will measure the colour, pollen content, conductivity and sugar spectrums of their honey to determine if it can be considered monofloral and from which origin.

Tips:

- Make sure you describe clearly the honey you export to your buyer. Stay informed on the different requirements regarding pollen content levels (for example clover honey must contain over 45% of clover pollen to be designated as clover honey).
- In some cases, UK importers and laboratories may be unaware of the properties of some honeys (such as longan honey from Vietnam). The authorities in the country of origin will need to establish a standard for the respective country. You can lobby for the development of such a standard by providing samples to the authorities.

Documentation:

UK honey buyers appreciate clear and elaborate documentation on the products they import. Information that UK buyers ask for usually includes:

- Product specifications (quality specifications, price indication, packaging)
- Production capacity (turnover, number of employees)
- Processing capabilities (certificates, quality management)
- Company structure (history, mission, vision and activities)

Tip:

- Buyers will appreciate a commercially oriented Product Data Sheet with photos, information on origin and bibliographic references, where available.

Samples:

Importers will usually send samples of the honey to a UK accredited independent laboratory for analysis before authorising the shipment. Most honey samples are handled by German laboratories such as [Intertek](#) and [QSI](#) or Minerva in the UK.

UK importers require analysis of samples from each batch of honey. This implies that exporters with a small homogenisation capacity of less than 20 tonnes will need to supply multiple samples per shipment.

Quality analysis by the honey suppliers is not adequate proof of the quality of honey. Therefore, honey buyers in the UK will demand a quality analysis conducted by an independent authority, such as the laboratories mentioned above.

Tip:

- Ensure delivery of honey supplies exactly according to the specifications of the sample submitted earlier to prevent disappointment for the buyer.

Quality and safety management:

Buyers in the UK frequently require certificates regarding the quality and safety of honey. This complements legal requirements for food safety and hygiene. HACCP is one of the most commonly used certificates in the UK, providing the company with a risk management tool which is used to manage food safety risks. ISO 22000 is a more demanding certification scheme to demonstrate to clients that a food safety management system is in place. BRC and IFS are quality management systems which are only required by a few buyers.

Tip:

- Collect information on certification requirements to assess your readiness for implementation of the management system before you invite an auditor of the certifier.

ITC's Standards Map

Check the [International Trade Centre's Standards Map](#) , an online tool which provides comprehensive information on over 130 voluntary sustainability standards and other similar initiatives covering issues such as food quality and safety. In Standards Map you can identify standards or codes of conduct relevant to your product, review the main features of the selected standards and codes and compare standards' requirements side-by-side. Furthermore you can assess your company's performance against standards requirements in a self-assessment module, and generate your own company's "sustainability diagnostic report" which you can then share with the business community. Check the Standards Map [videos](#) to see how Standards Map can help you to determine which initiatives may be useful for your company.

What are the requirements for niche markets?

Comply with the requirements below to gain access to specific market segments.

Corporate responsibility:

Corporate social responsibility is one of the ways for companies to differentiate themselves in the market. A CSR policy usually consists of environmental and social aspects. For example, honey exporters can recycle waste and improve safety for employees at the processing plant. Environmental management systems may be based on the international standard [ISO14000](#), but certification for this is commonly not required in the honey market. Similarly, [OHSAS18001](#) regarding occupational health and safety and [SA8000](#) regarding social conditions can provide a solid basis for improvement of social conditions, while certification is optional.

Tip:

- UK buyers appreciate initiatives in the area of corporate responsibility. However, this does not automatically translate to certification requirements. UK buyers appreciate the systems and procedures in place more than an actual certificate.

Organic certification:

Organically produced honey is gaining popularity and is becoming a mainstream product that is also used increasingly in the industrial sector. The EU has set specific requirements for organic production and processing in the EU regulation on [Organic Farming](#) which is also binding for Germany. These include requirements mostly for beekeeping, such as beehive construction and bee health treatment. Additional requirements regarding GMO pollen content, packaging and processing conditions are set.

Tip:

- For more information on certification schemes, please refer to [ITC Standards Map](#).

Fairtrade certification:

Increasingly, European consumers are concerned with the impact of their consumption patterns on working conditions of producers and local communities. Therefore, [Fairtrade honey](#) is becoming increasingly popular in the EU. The [standards](#) of the Fairtrade Labelling Organisation (FLO) include the following requirements:

- Contracts between buyers and suppliers must stipulate an arbitration mechanism
- Traceability through documentation
- Buyers must establish sourcing plans
- The Fairtrade payer must provide 60% of the contract value to the producer as pre-finance
- Minimum prices and premiums
- Differentiation between A and B quality honey (minimum quality is based on EU legislation and resembles standards in conventional trade)

Tip:

- Read the [CBI Product Factsheet: Fairtrade honey in the United Kingdom](#) for more information. If you are considering acquiring a Fairtrade certificate, refer to the website of Fairtrade International, the official Fairtrade organisation. For the certification requirements please refer to the website of the certifier [FLOCert](#).

What competition do I face on the UK market for monofloral honey?

High quality requirements:

Buyer requirements for monofloral honeys are very strict. Due to the limitations for importers on processing monofloral honey in terms of blending, heating and drying, they require very high quality. Moisture content, hydroxymethylfurfural (HMF) values, sugar composition and other quality parameters must all be well within limits. This requires strict quality management by the exporter and a high level of knowledge by beekeepers. They must know how to manage their colonies and hives in order to make the bees collect the monofloral nectar and how to harvest it properly.

Tip:

- Collaborate with beekeepers and possibly researchers to develop best practices for monofloral honey production.

Additionally, develop rigorous testing methods for quality control.

Uniqueness prevents substitution:

The unique properties of each monofloral honey and respective consumer labelling enable strong differentiation in the market. Moreover, importers cannot easily substitute one monofloral honey source by the other. Firstly, there are fewer sources of monofloral honeys. Secondly, substitution generally results in a honey with a significantly different appearance and taste. This is different for polyfloral honeys. Polyfloral honey blends often comprise many different honeys. Substitution of one honey has limited impact on the properties of the blend.

Tip:

- Promote the uniqueness of your honey and convince buyers of the reliability of your supplies. Certification of your quality management system can serve as proof of your ability to provide reliable supplies.

Rivalry depends on nectar source:

Competition is strongest in the markets for monofloral honeys from large-scale cultivated nectar-rich flora and dominant trees, such as acacia, orange blossom and rapeseed. In contrast, competition is always non-existent in markets for monofloral honeys from plants which provide little nectar and are not cultivated commercially.

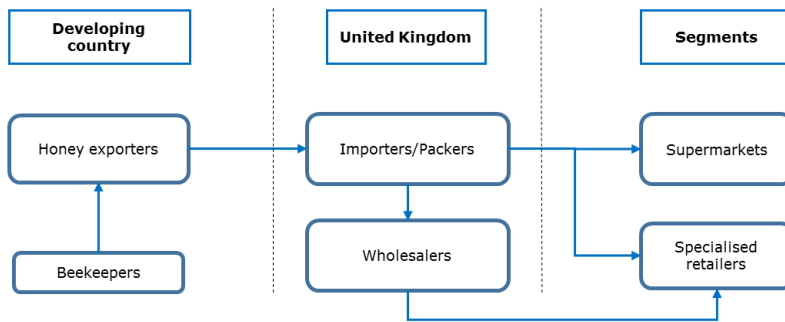
Tip:

- Find out which nectar sources in your region are interesting in terms of:
 - Productivity (amount of nectar per flower or hectare)
 - Total production (a full container load of 20 tonnes is generally required to make it interesting for UK buyers)
 - Technical feasibility (difficulty of harvesting a monofloral honey)
 - Appearance and taste of honey (UK consumers must appreciate it)

Refer to [CBI Top 10 Tips for Doing Business with European Buyers and CBI Competition](#) for more information.

What do the trade channels and interesting segments look like in the UK for monofloral honey?

Figure 5: Market channels for monofloral honey in the United Kingdom



Source: ProFound (2015)

Most monofloral honey from developing countries is imported by honey packers which supply directly to major supermarkets, such as [TESCO](#), [Waitrose](#) and [Morrisons](#). However, particularly in the monofloral honey market, specialised retailers also account for a considerable share in retail sales.

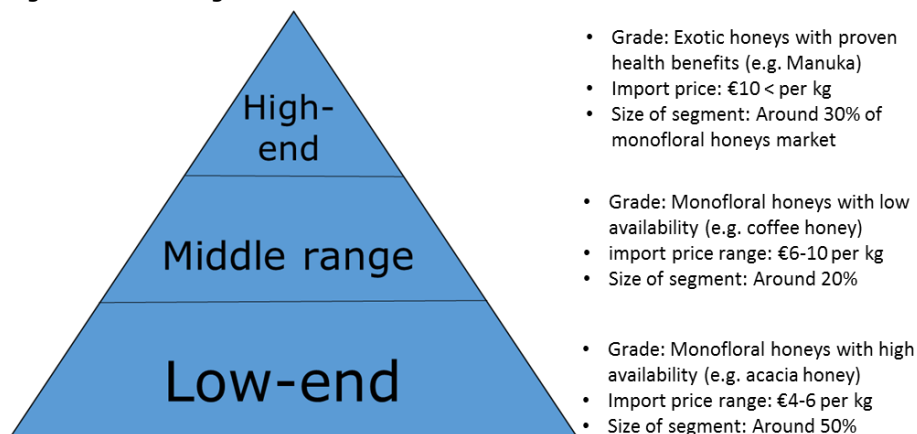
Importers usually blend honeys from different origins to obtain a honey which meets all the strict requirements of their buyers. As they cannot blend monofloral honey, which would otherwise become polyfloral honeys, importers are particularly strict in their quality specifications when they buy monofloral honey.

Tip:

- Rigorously test monofloral honey from beekeepers to ensure compliance with buyer requirements.

Segments

Figure 6: Market segmentation



The high-end segment within the monofloral honey market is relatively big. Manuka honey dominates this segment. Despite its high price, this honey remains very popular in the UK.

Tip:

- Position your monofloral honey in the corresponding segment of the market and avoid direct competition with Manuka honey unless you have strong scientific evidence to make health claims.

Refer to [CBI Channels and segments for honey in the EU](#) for more information.

What are the end market prices for monofloral honey?

FOB prices of monofloral honeys range from around €4 /kg to €15 /kg, with prices of most monofloral honeys not exceeding the €10 mark. The price of a monofloral honey depends largely on availability, which in turn depends primarily on the availability of the respective bee forage. For example, the large orange plantations in Mexico provide a lot of bee forage, resulting in a large and low-cost production of orange blossom honey.

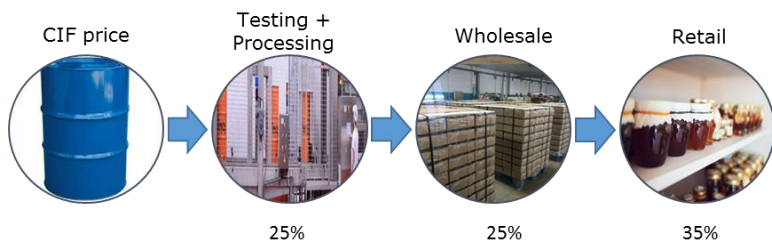
In 2015, wholesale prices of both acacia and orange blossom amounted to €7/kg excl. VAT.

Table 2: Indicative retail prices/kg for monofloral honeys in UK supermarkets

Monofloral honeys	Tesco	Sainsbury's	Morrison's	Asda	Waitrose
Acacia	€17	€13	€9	€17	€12
Orange Blossom	€17	€13	-	€13	€17
Borage	-	-	-	€21	€22
Manuka	€55	€51	€59	€69	€55

Source: ProFound, 2015

Figure 7: Price breakdown



Source: ProFound, 2015

Due to the relatively small amounts of monofloral honey traded in the UK market, mark-ups of the intermediaries are somewhat higher than in the polyfloral honey market.



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November 2015