

What is the demand for honey on the European market?

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Europe is a major honey market with a large and growing demand. It offers opportunities for suppliers of honey from developing countries targeting larger domestic markets and focusing on smaller market segments, while offering a more differentiated product.

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1. What makes Europe an interesting market for honey?

Europe is one of the largest honey markets in the world, with large local production and high consumption of the product. Europe offers good opportunities for honey exporters from developing countries, as the region is the world's largest honey importer and supplies about half of its honey needs by importing from developing countries. In addition, Europe is the largest market for organic food, and organic honey is becoming increasingly popular among European consumers.

Europe: One of the largest honey markets in the world

There are beekeeping operations in all European countries, characterised by diverse production conditions, yields and apiculture practices. Europe is the world's second-largest honey producer after China. In 2021, Europe accounted for over 13% of global production, totalling 1,772 thousand tonnes. In 2022, [Europe had more than 20.2 million hives](#) dedicated to the beekeeping industry. The number of hives has grown steadily over the last 5 years, at an average annual rate of 4.0%.

European honey production has fluctuated considerably in recent years. Overall, honey production showed a negative trend, [falling from 274,600 tonnes in 2018 to 228,300 tonnes in 2021](#). However, between 2021 and 2022 significant growth was recorded, reaching 285,700 tonnes. This performance corresponds to an average growth of 1.0% per year for 2018-2022.

The decline in European production observed in most of 2018-2022 is mainly attributed to the negative impact of the COVID-19 pandemic and to a decline of bees. The latter is largely the result of [bee diseases \(such as the parasitic mite *Varroa destructor*\)](#), the intensive use of chemicals and the application of pesticides in agriculture, and other environmental factors such as climate change. The economic climate of general inflation and energy crisis has also threatened the viability of beekeeping.

According to [Copa and Cocega](#), growth in 2022 was mainly driven by a good production season in northern Europe, thanks to flowering and nectar production as well as favourable weather with infrequent rains. They do state that despite this growth, European beekeepers are undergoing a very critical period and that it's difficult to predict future production. What is certain, however, is that the pressure on European honey production could create more opportunities for developing country exporters who are able to guarantee a consistent quantity and

quality of honey.

Source: [European Commission 2022](#) & [European Commission 2023](#)

Europe is also among the largest global consumers of honey, together with China and the United States, and accounts for an estimated 20% share of total consumption worldwide. A survey aimed to assess factors influencing honey consumer behaviour found that [Europeans consume honey on a weekly basis](#), and in some countries like Slovenia and Greece it is consumed on a daily basis. Growing consumer interest in natural products is one of the main drivers of the growth in European honey consumption.

Overall, [Europe's honey market can only satisfy 60% of its demand](#) from its own production. The European [countries with the highest honey production are mainly in southern Europe](#), and include Romania, Spain, Hungary, Germany, Italy, Greece, France and Poland. Many of these countries produce very little of what they need. There are only a few countries that are completely self-sufficient, like Romania, Czechia, Portugal and Hungary. Consequently, Europe needs to import honey from extra-European countries to cover the rest of its internal demand or consumption. In that sense, Europe is not only a major producer but also a net importer of honey from third countries, which can create huge opportunities for non-EU producers of honey.

European honey imports on the rise

Europe is the world's largest importer of honey, accounting for approximately 50% of global honey imports. In 2022, European honey imports reached 363 thousand tonnes and were valued at over €1,240 million. According to [FAO statistics](#), 12 of the world's top-20 importing countries are European: Germany, the United Kingdom (UK), Poland, Belgium, Spain, France, Italy, the Netherlands, Portugal, Switzerland, Greece and Austria. [Europe's honey trade balance is largely negative](#), with imports significantly exceeding exports.

Source: ITC Trade Map, 2023

Between 2018 and 2022, European honey imports increased on average in both volume and value. Growth was higher in terms of import value, climbing almost steadily at an average annual rate of 5.8%. This growth in import value is directly linked to the rise of honey prices on the European market and of imported honey from the main suppliers.

The average import price of honey from non-European countries was €2.65/kg in 2022, representing an average growth of 7.6% per year since 2019. Ukraine, one of the main honey-producing and -exporting countries to Europe, [recorded a 39% increase in honey prices](#) between 2021 and 2022. This general price increase might be associated with the war in Ukraine and other events that affect production and create uncertainty about supplies.

Table 1: European average unit value for imported honey, in €/kg, by origin

	2019	2020	2021	2022
China	1.4	1.38	1.37	1.58
Ukraine	1.68	1.53	1.89	2.63
Argentina	2.28	2.2	2.74	3.31

Mexico	2.56	2.22	2.88	3.67
Cuba	2.11	1.83	2.08	2.66
Vietnam	1.39	1.33	1.71	2.01
Brazil	2.67	2.17	2.77	3.61
Chile	2.71	2.72	3.5	4.03
Turkey	3.46	3.33	2.53	2.63
Moldova	2.69	2.26	3.24	3.57
United Kingdom	4.29	4.23	4.13	4.36
Uruguay	1.99	1.78	2.69	3.27
Nicaragua	3.06	2.75	3.13	3.92
New Zealand	28.52	29.13	28.1	21.06
Extra-EU	2.13	2.06	2.34	2.65

Source: [European Commission](#), 2023

On the other hand, the imported volume highly fluctuated between years, with a peak in 2020 and a steady fall in 2020-2022. Still, the volume of imports managed to register an average annual growth of 0.5%. The rise in honey prices may have contributed to the fall in import volumes.

Source: Trade Map, 2023

Germany is the largest honey importer in Europe, accounting for 21% of total volume imported and 23% of total value imported. The UK (14% of total volume and 9.8% of total value), France (10% of total volume and 11% of total value) and Belgium (11% of total volume and 7.9% of total value) are the other main European importers. Importers in these countries process the honey and sell it both domestically and abroad.

Total honey imports are expected to show little growth or even a negative trend in the coming years. This is mainly because [honey adulteration problems](#) have made many European buyers wary about the purity and authenticity of honey from various cheap suppliers, and so they are hesitant to buy honey at prices that are too good to be true. Also, industry sources are anticipating a fall in prices, which will have an impact on the total value of imports.

Growing imports from developing countries create opportunities for new suppliers

Europe relies on imports from non-European countries to meet about 40% of its honey demand. Honey producers and exporters from developing countries are playing an increasingly important role in the European

honey market.

In 2022, European honey imports from developing countries were valued at €613 million, accounting for 49% of the total import value. In 2018-2022, the value of honey imports from developing countries increased significantly, at an average annual rate of 7.3%. Between 2021 and 2022 alone, demand for honey from developing countries increased by 32%. Due to a significant decline in European honey production, demand for honey from developing countries is expected to continue to grow rapidly.

Source: ITC Trade Map, 2023

A general growth was also observed in terms of import volume. In 2021, EU countries [imported 173,400 tonnes of honey from countries outside Europe](#), mostly developing countries. This represents a growth of 1.4% per year on average compared to the volume imported in 2016. It is assumed that the total volume imported by Europe may be even higher, as the number given above excludes imports from countries such as the UK, an important market for honey.

Source: ITC Trade Map, 2023

The largest honey supplier to the European market is China, which accounts for 31% of the total value and nearly 28% of the total volume of honey imports to Europe. Other [developing countries that are major suppliers of honey to Europe](#), both in value and volume, include Ukraine (accounting for 22% of the total import value), Argentina (12%), Mexico (9.2%) and Brazil (3.7%). The value of imports from these countries has shown a positive trend for the most part. Meanwhile, no clear trend was seen in the imported volumes from these countries. It is worth noting the strong growth in the value of imports from Ukraine, at an average annual rate of 15% in 2018-2022. The volume of honey imports from Ukraine followed 2 patterns, but overall recorded an average annual growth of 2.9%. In 2018-2020 the imported volume increased steadily thanks to an additional [duty-free tariff quota for imports of natural honey from Ukraine](#), which incentivised the redirection of exports to the European Union (EU). In contrast, from 2020 to 2022 the volume imported fell steadily, most likely due to the war. Also, there has been a significant drop in the value and volume of Mexican exports to Europe. Five years ago, Mexico was Europe's second-largest supplier, but after falling at an average annual rate of 11% in value and 13% in volume it now ranks as fourth-largest. This is because Mexico has [redirected its exports to other destinations, such as the USA and Saudi Arabia](#), taking volume and value away from exports to Germany and the UK (which once [used to account for over 50% of Mexican honey exports](#)). As Germany and the UK are the largest European destinations for honey, the negative trend is reflected in total exports to Europe.

Both situations might create opportunities for suppliers from other developing countries who can help European buyers replace declining Ukrainian and Mexican honey supplies. To realise these opportunities, it is important that aspiring suppliers produce sustainably and avoid being associated with adulteration.

Source: ITC Trade Map, 2023

African countries still have a marginal share in European imports of honey. In 2022 there was no African country among the top-20 honey suppliers to Europe. However, there are some countries with steady imports which may have potential as relevant suppliers. Among the largest African honey exporters, Tanzania and Burkina Faso stand out, as they show significant growth in their honey exports to Europe. In 2018-2022, the value of honey exports from these countries to Europe increased at an average annual rate of 8% for Burkina Faso and 42% for Tanzania.

Honey is becoming popular in Europe's large organic market

Europe is the region with the largest organic food market in the world. In 2021, the [European organic food](#)

market was valued at €53-€54 billion, commanding a 44% share of the retail distribution of the global organic market. [European per capita consumption of organic products](#) is estimated at €102, on average.

Source: [FIBL](#), 2023

Europe's organic market is very dynamic and is growing rapidly. Between 2020 and 2021, [retail sales of organic food in Europe grew by 4%](#). The European organic market is expected to continue growing to €100 billion by 2025. The continued [growth is due to a combination of factors](#) such as the increasing demand from European consumers for sustainable and high-quality food production, the innovative nature of organic food and farming, and growing political support with policies such as the European Commission's [Farm to Fork Strategy](#).

Source: [TRACES](#), 2023

Honey is a product that is becoming very popular in the organic food market. In 2022, the [global organic honey market was valued at €778 million](#). This market is expected to grow significantly, to reach a value of €1.6 billion by 2032. Organic honey is becoming very popular in Europe, as consumers are increasingly interested in natural and sustainable food. In fact, organic honey imports to the EU grew at an average annual rate of 2.8% between 2018 and 2022. Just in 2021, honey was among the top-3 products imported by the European Union [that had a significant and growing organic share](#), along with olive oil and tropical fruits. Still, it is important to clarify that sales of non-organic honey continue to far outstrip organic honey. Therefore, exporters of honey with organic certification or implementing organic practices should consider Europe as an interesting market.

Tip:

Refer to [our study on trends in the European honey market](#) to learn more about which trends offer opportunities in the market.

2. Which European markets offer most opportunities for honey?

European demand for honey is strong and growing. Importers are increasingly looking for new suppliers. Germany is the main market for honey, followed by the UK, France, Belgium, Poland and Italy. The German, British, French and Belgian markets account for more than 50% of total European honey imports.

Source: ITC Trade Map, 2023

Source: ITC Trade Map, 2023

Germany

Germany is the European market offering the greatest opportunities for honey. Not only is it [the largest market in terms of retail sales](#), but it also dominates European honey imports, both in value and volume. Due to its large population and high demand, Germany is said to be the country with the greatest potential for the honey market.

Germany is already the largest market for honey in Europe, [valued at €587 million in 2020](#). In 2016-2020, the

German honey market grew at an average annual rate of 4%. The size of the German market is supported by the fact that Germany is the most populous country in Europe.

Germany is by far the largest European importer of honey. In 2022, the country imported 75,091 tonnes of honey, worth over €288 million. Germany accounts for a 23% share of the total import value and a 20% share of the total import volume in Europe. Being such a large and mature market, Germany tends not to show very impressive growth rates. In fact, in 2018-2022 the volume of German honey imports decreased at an average annual rate of 3.3%. The fall in import volumes may be partly linked to the increase in honey prices in the context of the [slowdown in the European economy](#), where both consumers and businesses are seeing their purchasing power affected. The rise in honey prices is also reflected in the value of honey imports, which shows a clear positive trend. In 2018-2022, the value of German honey imports grew almost steadily at an average annual rate of 2.7%. Since Germany demands the most honey in Europe, it is assumed that it has many honey importers. Some honey importers and packers in Germany are [Walter Lang GmbH](#), [Tuchel & Sohn GmbH](#) and [BIHOPHAR](#).

Germany is also the main export destination for honey supplied from developing countries. In 2022, the value of German honey imports from developing countries reached €177 million, accounting for 61% of total German honey imports. Between 2018 and 2022, the value of these imports grew on average by 1.8% per year. Just in the last year, the value rose by 30%, from €136 million in 2021 to €177 million in 2022. The main developing countries supplying honey to Germany are Ukraine (14,544 tonnes imported in 2022), Argentina (11,357 tonnes) and Mexico (9,930 tonnes).

In addition, Germany is the [world's second-largest market for organic food products](#), only behind the USA. In 2021, the [German organic food market was valued at €15.8 billion](#), representing a growth of 6% compared to the value in 2020. Germany has an equivalent per capita expenditure of €191 per year on organic food, exceeding the average per capita expenditure in the European market.

United Kingdom

The UK is the second most promising honey market, as it is mature and dominates a large share of honey imports. The UK offers several opportunities to African exporters since it has been importing African honey for many years already.

In 2020, the UK had the fourth-largest European honey market, [valued at €228 million](#). Compared to 2016, this corresponds to an average annual growth of 4.7%. The UK is also among the top-10 organic food markets in the world, and among the top-5 markets in Europe. In 2021, British [retail sales of organic food reached €3,461 million](#).

The UK is the second-largest importer of honey in Europe in terms of volume and the third-largest in terms of value. In 2022, the UK imported 51,912 tonnes of honey, valued at €122 million. Volume imported in 2018-2022 was around 50,000 tonnes. Each year over the last 5 years, honey imports grew on average by 0.6% in volume and by 2.7% in value. One of the largest importers and packers in the UK is [Rowse Honey](#).

The UK is also the second-largest European importer of honey from developing countries. In 2022, the value of honey imports was €73.8 million, representing 60.5% of total British imports. In 2018-2022, the value of imports grew at an average annual rate of 7.5%. This positive trend is an indicator that demand for honey from developing countries will continue to grow in the coming years. Currently the main suppliers of honey to the UK are China (38,442 tonnes imported in 2022), Mexico (2,252 tonnes) and Vietnam (2,006 tonnes). The UK is very open to buying honey from China. In 2022, 74% of all British honey import volume came from China.

One British importer and packer working directly with developing country exporters is [Tropical Forest](#). Their product range includes common polyfloral and monofloral honeys. They currently have a long-standing relationship with the leading African exporter, Forest Fruits from Zambia, and source from Cameroon and Ethiopia.

France

France is another high-potential destination for honey from developing countries.

France is a very large market, second only to Germany. In 2020, the [French honey market was valued at €484 million](#), corresponding to an average annual growth of 4.1% in 2016-2020. In addition to being a large market, France also re-exports a large share of imported honey to destinations like Italy, Spain and Poland. France is considered a hub of the honey trade, so it is assumed that most of the major importers and processors of honey are in those countries.

In 2022, France imported 35,506 tonnes of honey, worth €134 million. France represents 9.8% of the total volume and 11% of the total value of European honey imports. In 2018-2022, French imports grew at an average annual rate of 5.0% in value and 2.4% in volume.

According to trade data, 37% of French imports come from developing countries, having reached a value of €49.5 million in 2022. Although France does not rely heavily on developing countries to meet its demand, imports from these sources have grown at an average annual rate of 7.9%. The main suppliers are China (6,962 tonnes imported in 2022), Ukraine (5,592 tonnes) and Argentina (1,591 tonnes).

Another attractive feature of France is its organic food market. In 2021, France was the [third-largest organic food market in the world](#) and the second-largest in Europe. That year, the French market reached €12,659 million in organic food retail sales. The country has one of the highest per capita equivalent expenditures, at [€187 per year](#).

Belgium

Belgium offers significant opportunities for honey, as its demand for honey is growing at a rapid pace.

Belgium is one of the most important honey importers in Europe. In 2022 it imported 39,756 tonnes, worth almost €98 million. Belgium accounts for 11% of the total volume and 8% of the total value of European imports. The demand for honey in Belgium is increasing. Over the last 5 years, Belgian imports grew at an average annual rate of 12% in both value and volume.

Belgium is the third-largest European importer of honey from developing countries. In 2022, Belgian honey imports from developing countries were valued at €71.5 million, which means that the country meets approximately 73% of its demand with imports from countries like China (21,383 tonnes imported in 2022), Ukraine (3,850 tonnes) and Mexico (1,569 tonnes). Like total imports, honey imports from developing countries are also growing rapidly. In 2018-2022, Belgian honey imports from developing countries grew at an average annual rate of 11%.

Belgium is not among the largest honey markets, but does play an important role in the trade of honey. It is believed to be an important trade hub, re-exporting imported honey to other European destinations. One Belgian honey importer is [Meli](#), which has now merged with the Dutch company [De Traay](#). In addition, Belgium has developed an important organic market. In 2021 it was among the top-10 organic markets in Europe, with [organic food retail sales of €978 million](#). This represents a growth of 5% compared to 2020.

Poland

Poland is among the top-10 largest honey markets in Europe. In 2020 [this market was valued at €163 million](#), growing at an average annual rate of 6.8% since 2016. Poland has remained among the top-10 fastest-growing honey markets in Europe.

Poland is a significant honey importer. In 2022, Polish imports amounted to 39,756 tons, worth €68 million. Poland's share of total European honey imports is 8.7% in volume and 5.5% in value. In 2018-2022 imports grew steadily, with a single drop in 2022. On average, Polish honey imports grew at an annual rate of 5.4% in volume

and 6.7% in value. [Corpo](#) is an example of a Polish importer and packer of conventional and organic polyfloral and monofloral honeys.

Poland is almost entirely dependent on developing countries to meet its domestic demand for honey. In 2022, 79% of Polish honey imports came from developing countries, mainly China (16,352 tons imported) and Ukraine (10,657 tons imported). Poland is one of the countries that is most open to buying honey from China: in 2022, 51% of all Polish honey imports came from China. Other countries, like Germany, are very reluctant to source from this origin. Also, Poland is believed to work as a gateway for Ukrainian exports to Europe. The value of imports is rising significantly, registering an average growth rate of 10% each year since 2018.

Italy

Italy is the sixth most promising country in Europe. The country's potential is linked to the size of its market and the fact that it dominates a large share of honey imports in Europe.

Italy is among the 10-largest honey markets in Europe. In 2020, [the Italian market was valued at €256 million](#), which corresponds to an average growth of 2.9% per year since 2016. Italy is also among the top-10 largest organic markets in the world, and third-largest in Europe. In 2021, [Italian organic food retail sales totalled €3,943 million](#).

In 2022, Italy imported 26,517 tonnes, worth €101 million. Italy has a share of 7.3% in the total volume and 8.2% in the total value of European honey exports. In 2018-2022, value of Italian imports grew at an average annual rate of 4.4% but volume decreased at an average annual rate of -1.2%.

In 2022, 21% of Italian honey imports came from developing countries and were valued at €21.5 million. The main suppliers of honey to Italy are Ukraine (2,371 tonnes imported in 2022), Argentina (1,334 tonnes) and China (1,011 tonnes). In the last 5 years, the value of these imports increased at an average annual rate of 4.1%. It is worth noting that imports have been growing steadily since 2020, and that between 2021 and 2022 alone the value of Italian honey imports from developing countries grew by 60%. This suggests a positive trend for the coming years. [Matrunita Mediterranea](#) is an Italian company that imports honey from various sources, and is a subsidiary of the Argentinian company [Parodi Group](#).

Tip:

Visit European trade fairs to meet and find potential business partners. Important trade fairs for honey in Europe include [Anuga](#) (Germany), [SIAL Paris](#) (France) and [Biofach](#) (Germany, only for organic produce). This is also a good opportunity to learn more about the European honey market.

3. Which types of honey have most potential on the European market?

Exporters of honey from developing countries should focus on smaller market segments and niches where buyers will accept higher prices such as table honey, certified honey and monofloral honey. Of course, these higher prices can only be justified where value has been added or where claims of exclusivity can be made and justified.

Table honey

The honey market is mainly segmented into honey for household consumption and honey for industrial use. An estimated 70-85% of all honey is for household consumption. Both segments are price-competitive, but

industrial honey is often very low-priced, low-quality and non-certified. Considering that the demand for table honey is higher than that for industrial honey, that competition in the industrial segment is higher, and that industrial honey has very low prices and qualities, exporters should focus more on table honey.

Table honey, the segment with the highest demand, is often used by households and consumers in food preparations, as a spread and as a natural sweetener. Depending on consumer preferences, honey for home consumption can be conventional polyfloral honey, certified honey or more niche honey (such as monofloral honey). In this respect, the table honey segment covers a wider price range and has a higher demand, as it caters to the preferences of different consumer groups.

This contrasts sharply with industrial honey, which is often used by the food industry for bakery, confectionery, cereals and other products. In this segment quality is very low – there is often no product differentiation and only price competition. Large exporters and packers dominate this market and prefer to buy their products in large quantities to minimise costs. For honey producers and exporters in developing countries, this segment is usually not very interesting as these exporters cannot always produce such large volumes and it is also very difficult for them to compete with the low prices of suppliers like China (see Table 1).

Table honey offers more opportunities for producers and exporters in developing countries, as it gives them the possibility to market their product, add value, and be able to compete without facing low prices and larger-scale players. In this way they can not only compete with very low prices, but also add value, easily market their product and receive higher prices.

Certified honey

Demand for certified honey is growing, and honey exporters that already implement organic practices or have the resources to opt for certification should take advantage of this positive trend to enter the European market by offering a valuable product.

European consumers are increasingly interested in sustainably sourced products and are more aware of the perceived benefits of natural and organic products. This has led to an increased demand for such products, driven also by their growing availability in mainstream retail channels and by developments on the regulatory front, in particular the [European Green Deal](#).

The 2 most relevant certification schemes for the European honey market are the [EU organic](#) and [Fairtrade International](#) standards.

Organic-certified honey

In recent years, the global market for organic food and drink has gained popularity worldwide, and in Europe it is increasingly moving from being a niche to becoming mainstream. Europe has the largest organic food market in the world, with almost half of global sales of organic products (see Figure 5).

The sale of organic products, including honey, has become popular and is no longer exclusive to health food shops and other specialised establishments in Europe: organic products can also be found in supermarkets, convenience stores and discount shops. In addition, the range of organic products is increasing. Retailers no longer only offer organic table honey, but more and more products containing organic honey as an ingredient. In other words, the food industry is gradually becoming a major user of organic honey. This is especially true for Western European countries.

Organic-certified honey can be of interest to producers and exporters in developing countries, as it is priced higher than conventional honey. This premium is linked to the perception that organic-certified products are healthier and better. However, this premium has come under pressure since the supply of organic honey has increased in the last 10 years, especially from countries like Brazil and Mexico. Although certified bulk honey fetches higher prices than conventional bulk honey, certification comes at a cost and may not appeal to all

producers. Exporters must carefully assess whether they can afford the certification, conversion and administrative costs.

Figure 11: European Union (EU) organic logo



Source: [European Commission](#), 2023

To enter the organic-certified honey segment, producers must follow EU organic regulation ([EU 2018/848](#)), which specifies some requirements on organic beekeeping, including the following:

- Beehives must be placed in an area with at least a 3-km radius that is free from major sources of chemical contamination such as intensive farming activities, including the use of pesticides;
- Beehives must be made from natural materials;
- Wax used by bees in their hives, such as foundation sheets in modern beehives, must be from organic wax;
- Diseases and pests must be managed using natural solutions instead of chemical antibiotics.

Fairtrade-certified honey

Fairtrade honey refers to honey traded on the international market under favourable conditions for honey exporters. Certification of Fairtrade schemes by FLO-cert provides additional support to honey processors and beekeepers, and helps them improve their livelihoods. Buyers pay a [Fairtrade premium](#) to the fund of the producer group, which the latter can use to improve their members' livelihoods.

Figure 12: Fairtrade logo



Source: [Fairtrade International](#), 2023

This segment is growing, as many European consumers are increasingly aware of the consequences of their purchasing behaviour on suppliers at the other end of the chain. In contrast to consumers who favour local products, there are many consumers who realise that they have the power and responsibility to make the honey trade fair for the world's poorest beekeepers.

In the market for fair trade products, companies specialised in Fairtrade, such as the German importer [GEPA](#), play an important role. These companies buy exclusively Fairtrade-certified products and usually establish long-term relationships with their suppliers.

Producing and exporting Fairtrade-certified honey can be interesting, given the increasing consumer demand and the higher prices often obtained compared to prices of uncertified honey. In addition, certification can help enhance and establish a strong image of exporters as responsible companies committed to sustainable development. However, it is important to note that specialised Fairtrade companies do not easily switch suppliers. This is good news for their current suppliers but reduces opportunities for new ones.

Monofloral honey

European consumers and buyers are increasingly interested in monofloral honeys because of their authenticity and quality. Monofloral honey may have a lot of potential for exporters in developing countries, as it tends to command a higher price than polyfloral honey. It is also believed that there is less competition in the monofloral honey market because the production of polyfloral honey is easier and less resource-intensive.

Most honey produced in the world is polyfloral. Bees collect nectars from a wide variety of flowers and

producers mostly do not make a link between the nectar sources and the honey for marketing purposes. Still, a range of monofloral honeys is also increasingly being sold in Europe, especially by specialist shops and independent retailers, including health shops and delicatessens. An increasing number of consumers in the most developed European markets have developed a preference for monofloral honeys. Especially in the leading European markets, demand for these monofloral honeys is increasing, as it often meets European consumers' preferences like light colour and mild flavour. However, this market remains small, accounting for an estimated 10% of the European honey market.

Most organic monofloral honey is distributed through small importers like [De Werkbij](#), who pack the honey for speciality shops. Monofloral honeys must meet quality specifications as established in EU [Directive 110/2001](#). Particularly compliance with moisture content limits is a challenge. Beekeepers must often 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%.

Prices for monofloral honey are higher than for polyfloral honey, although they vary considerably between the different types of monofloral honeys. On average, the price is around €15 per kg, yet it can sometimes be as high as €100 per kg. This is the case for manuka honey, one of the most expensive honeys in the world. It is produced by bees foraging on the manuka tree (*Leptospermum scoparium*), which is native to New Zealand and Australia. The high prices for manuka honey are closely related to the research done on its [health benefits](#).

Tips:

Find importers that specialise in organic products in specific European markets on the [website of Organic-bio](#). Search for specialised European buyers who are experienced with sustainable and/or fair trade products in the [FLOCERT customer database](#).

Before joining a certification scheme, inform yourself about the costs of certification, including the cost to become compliant with the certification standard and the fees charged by certifying bodies. Also, you should first check with your potential buyers if they require certification and whether it will give you a competitive advantage over other suppliers.

[ProFound - Advisers In Development](#) carried out this study on behalf of CBI.

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