

Market Development

MARKET BRIEF ON

HONEY

OVERVIEW OF THE EUROPEAN UNION MARKET

1994

ITC



INTERNATIONAL TRADE CENTRE UNCTAD/WTO

Honey - Overview of the European Union market

Product description

HS 0409.00 Natural honey

Production and trade 1

During 1989-1993, EU production of honey averaged 100,000 metric tons per year with Germany, Spain, France, Greece and Italy as the largest producers. Generally speaking, the honey which is domestically produced in the EU is of the highest quality and usually much sought after by the local population. Data on production per country is provided in annex I.

EU supply situation for honey :

Q: metric tons V: ECU '000	Imports		Exports		Production	Apparent consumption
	Q	V	Q	V	Q	Q
1989	129,263	141,712	19,653	45,398	103,771	213,381
1990	144,799	134,820	30,297	51,486	93,345	207,847
1991	156,230	155,858	28,210	49,453	99,669	227,689
1992	168,635	169,292	31,023	55,599	102,677	240,289
1993	158,821	127,117	28,785	47,379	108,673	238,709

Sources: Eurostat, FAO Production Yearbook 1992, 1993.

Germany accounts for about 50% of total EU imports. Other major importing countries re the United Kingdom, Italy, the Netherlands and France (see annex II for details). In recent years imports into Spain have increased considerably. This country is also the second largest EU exporter after Germany, and shows the largest import growth rate in the EU during the period under review. Other countries with significant import growth during these years are Denmark, Belgium and Greece.

Imports from non-EU countries have generally increased more rapidly over the period than supplies from EU countries. Based on 1993 data, total extra-EU imports by quantity, the main suppliers of natural honey are Argentina (26%), China (24%) and Mexico (21%). Other significant developing countries supplying honey are Cuba and Uruguay, and, along with those countries with economies in transition such as Hungary and Poland, they are expected to continue to provide strong competition against traditional suppliers on the market in the immediate and medium term. Most of the honey imported into Germany originates in developing countries and part of this is re-exported once refined and consumer-packed.

(1) The method of data collection on trade flows between members of the EU was modified with the creation of the single European market (abolition of customs formalities between Member States) which came into effect on 1 January 1993. For purposes of comparison, therefore, data presented in this brief has been divided into intra-EU and extra-EU trade; commentary in this market brief will focus on imports from non-EU sources. However, for the purpose of estimating apparent and per capita consumption, intra-EU and extra-EU figures have been combined.

Market characteristics

An estimated 18% of the total world honey production is consumed in the EU, which accounts for only 7% of the world population. The average annual per capita consumption of honey in 1993 was 0.7 kg, with Ireland and France having the lowest figures of 0.3 kg and 0.4 kg respectively, while Greece had the highest at 1.5 kg, followed by Germany with 1.3 kg.

On average, 85-90% of the honey consumed in the EU is destined for table consumption where the liquid form is preferred in most countries. The remainder (10-15%) is used for industrial purposes, such as for confectionery, bakery and pharmaceuticals. However, Italy is the exception, with over 40% of imported honey being used for industrial purposes, mostly for the production of an Italian speciality called "torrone", which is similar to nougat. In most countries, honey of lower quality is accepted for industrial purposes only.

Polyflora honey is very popular. Among monoflora honey, acacia is one of those most in demand. Other specialities such as orange, lavender, thyme and rosemary sell mainly in the south of Europe. Imported honey should be clean and uniform in quality and colour. Importers and packers are also particularly concerned with taste and aroma.

Packaging

Honey is normally shipped in full-removable-head steel drums, usually with a standard capacity of 300 kg, (which can be taken as the standard 55 gallon drum). Some importers may accept other containers such as 50 kg or 80 kg steel drums, but it is strongly recommended that previous agreement on this be obtained.

With regard to the shipping of prepacked honey as opposed to honey in bulk, a number of factors should be borne in mind. First, the retail packaging of honey for export is not, as a rule, an economically viable undertaking in developing countries, especially if the packaging materials (glass or plastic jars, labels, lids, etc.) have to be imported; research has shown that retail packing costs are usually lower in the importing countries. Secondly, freight costs are far higher for prepacked honey than for bulk honey. Thirdly, if prepacked honey crystallizes before reaching the final consumer, it cannot easily be reliquified. For these reasons almost all honey imported into the EU is in bulk form.

At the retail level, packaging of honey in 250 g, 500 g or 1 kg plastic or glass jars is preferred.

Storage and transport

A good honey may be spoiled by poor storage and transport. This problem is of particular relevance to developing countries where honey is often produced at a considerable distance from the port of shipment. As honey should not be exposed to heat because the quality will deteriorate, storage and transport time must be kept to an absolute minimum.

Market access

Honey imports are usually handled by specialized agents and importers. As a general rule, only very experienced exporting countries should consider setting up their own sales organizations in target markets, and they must be prepared to face competition from established traders. See annex III for a list of importers and agents.

Market prospects

Despite the presence of traditionally major exporters such as Argentina, Mexico and China, prospects are good for exporters in other countries. The market share of major exporting countries in the European Union applies the Common External Tariff (CET) rate, which is currently 27% ad valorem. It is important to note that, with the conclusion of the Uruguay Round of multilateral trade negotiations, this rate will be reduced to 17% and will be implemented in equal annual instalments from 1 July 1995 to 1 July 2000.

Under the Generalized System of Preferences (GSP), a preferential rate of 25% is applied to developing countries, Poland, Bulgaria, Hungary, Romania, Malta and the Czech and Slovak Republics. Under the Lomé Convention, honey imported from ACP countries is exempt from duties.

Some EU countries have a quota system to protect domestic honey production. Those restrictions are applied when the domestic crop is good. The official journal of the EU (L-2985 Luxembourg) lists national regulations incorporating new EU directives referring to the control of goods, and veterinary and phytosanitary controls.

Prices

Import prices are determined largely by the quality and type of honey offered, its composition, colour, botanical source, stage and form of processing (extracted honey, chunk honey, comb honey, etc.). They also depend on the country of destination. For example, German consumers prefer very dark honey for table consumption and are willing to pay higher prices for this product, whilst other countries which prefer light honeys normally accept dark honey only for industrial use, at lower prices.

Sales promotion

Compared with other food products, little sales promotion and advertising is undertaken for honey. It is important that exporters should actively promote their products and support the marketing efforts undertaken by importers, packers and retailers in the target market. In particular, exporters should prepare background material in the form of information sheets, leaflets, brochures, describing the beekeeping industry in their country or region, botanical sources, and characteristics of their honey. They should also supply agents and importers with samples at the start of each crop year. Participation in trade fairs helps to establish trade contacts (see Useful addresses for details).

Distribution channels

These are expected to decrease mostly due to increasing production costs and rising domestic consumption. Their production in 1994 is estimated 15% to 20 % lower than in 1993. Market penetration can be achieved by observing such marketing strategies as ensuring the high quality of the product, delivering honey of the same standard as that provided in samples, and targeting suitable markets. Countries in Africa, for example, where the production is high but exports are almost negligible should try to upgrade quality in order to meet the requirements of the market. In the meantime some of them may be able to supply the industrial market.

Useful addresses

International associations

IBRA - International Bee Research Association
North Road
CARDIFF CF1 3DY
Wales, UK
Tel: (753) 885 011
Tlx: 23152 monref g 8390

APIMONDIA- International Federation of 18
Beekeepers' Association
Corso Vittorio Emmanuele 101
00186 ROME, Italy
Tel: (06) 65121
Tlx: 612533

National associations and import promotion offices

1. Germany

Honig Verband der Bundesrepublik
Deutschland e.V.
(Honey Trade Association)
Haus Schütting, 146 Am Wall
Postfach 100705
28195 BREMEN
TEL: (0421) 325 552

Deutscher Imker Bund e. V.
(National Beekeepers' Association)
12 Auf dem Grevel
5307 WACHTBERG 3
Tel: (0228) 321 006

Institut für Honigforschung
(Institute for Honey Research)
15-18 Schlachte
28195 BREMEN 1
Tel: (0421) 12449

Waren-Verein der Hamburger Börse e.V.
(Association of the German Import Trade)
Grosse Bäckerstraße 4
20095 HAMBURG
Tel: (040) 374 7190
Fax: (040) 3747 1919

Bundesstelle für Außenhandelsinformation (BfAI)
(Federal Office of Foreign Trade Information)
P.O. Box 100522
50445 COLOGNE
Tel: (0221) 20570
Tlx: 8882735 BFA D
Fax: (0221) 205 7212

2. Italy

Istituto Nazionale per il Commercio Estero
(Italian Institute for Foreign Trade)
Via Liszt 21
PO Box 10057
00100 ROME EUR
Tel: (06) 59921
Tlx: 610160 icerm I

3. France

Union Nationale de l'Apiculture
26, rue des Tournelles
75004 PARIS
Tel: (1) 4887 4715
Fax: (1) 4887 7644

Syndicat National d'Apiculture
5, rue Copenhague
75008 PARIS
Tel: (1) 4522 4842
Fax: (1) 4293 7785

Institut Technique de l'Apiculture (ITAPI)
La Guyonnerie
91440 BURES-SUR-YVETTE
Tel: (1) 6446 0467

4. United Kingdom

British Honey Importers and Packers Association
(BHIAPA)

Kemp House
152/160 City Road
London EC1V 2NP
Tel: (071) 253 9421
Fax: (071) 250 0965

The Developing Countries Trade Agency
(DeCTA)

Bank House
Sutton Court Road
Sutton, Surrey SM1 4SP
Tel: (081) 643 3311
Tlx: 948116 caphco g
Fax: (081) 643 8030

5. Netherlands

Vereniging tot bevordering van de bijenteelt in Nederland
(Association for the promotion of beekeeping in the Netherlands)

Grintweg 273
6704 AP Wageningen
Tel: (83) 702 2733

CBI - Centre for the Promotion of Imports from Developing Countries

PO Box 30009
3001 DA ROTTERDAM
The Netherlands
Tlx: 27151
Fax: 4114081

Trade fairs

ANUGA

World Food Market
KölnMesse Messe-und Ausstellungs GmbH
Postfach 210760
50532 COLOGNE, Germany
Tel: (0221) 8210
Fax: (0221) 821 2574
Biennial, odd years

ALIMENTARIA

Feria de Barcelona
Avda. Reina M. Cristina
08004 BARCELONA, Spain
Tel: (03) 4233 3101
Fax: (03) 423 8651
Biennial, even years

SIAL

39, rue de la Bienfaisance
75008 PARIS, France
Tel: 4289 4687
Fax: 4289 4694
Biennial, even years

EXPO FOODS

Expo Cts
Via Serbelloni, 2
20122 MILANO, Italy
Tel: (02) 77181
Fax: (02) 781 828
Annual

Annex I

EU Production of honey, in metric tons

	1989	1990	1991		1992		1993
Total	103771	90345	96669		100628		106626
Germany			25000	*	24667	*	28000
Germany FR	29009	18748					
Germany DR	9944	6989					
Spain	21441	23458	25300	E	25000	E	25000
France	E 15000	15000	16850		17183	E	17500
Greece	10997	11496	13519		13213		14826
Italy	9400	10000	11000		12500		13200
Portugal	3280	3324	3400		3465	E	3500
Netherlands (E)	500	500	500		500	E	500
UK *	3000	3000	3000		3000	E	3000
Belg.-Lux.	1100	* 1000	* 1000	*	1000		1000
Ireland (E)	100	100	100		100		100
Denmark	na	na	na		na		na

na: not available; * unofficial figure; E: FAO estimate.

Source: FAO Production Yearbook, 1991-1993.

Annex II

EU imports of natural honey (V: ECU'000; Q: metric tons)

HS 4909.00	Trade flow	1991		1992		1993	
		Q	V	Q	V	Q	V
Total EU imports	Intra_	24601	40139	23637	39552	21371	33537
	Extra_	131629	115718	144995	129734	144869	105896
France	Intra_	5406	7300	6865	9159	4427	6235
	Extra_	2088	2418	1461	1621	1770	2118
Belgium_Luxembourg	Intra_	2137	3679	1469	3209	893	1846
	Extra_	4763	4352	6094	5412	3460	2989
Netherlands	Intra_	4611	7290	4539	7798	3688	6530
	Extra_	4196	3805	3941	3759	2551	2435
Germany	Intra_	5641	10816	3050	6802	4535	6980
	Extra_	83554	72327	86185	78810	75985	66339
Italy	Intra_	2406	4411	2291	4702	1943	3931
	Extra_	9411	9563	0096	9076	8403	6966
United Kingdom	Intra_	798	1007	431	665	1372	2668
	Extra_	21471	17620	22316	18303	16660	12393
Ireland	Intra_	560	843	363	595	925	1104
	Extra_	590	517	657	555	1060	939
Denmark	Intra_	1216	1444	1499	1940	1507	1688
	Extra_	2244	1932	2750	2566	2647	2497
Greece	Intra_	1659	2996	1843	3057	712	1386
	Extra_	598	717	835	901	1317	1237
Portugal	Intra_	45	103	50	112	37	82
	Extra_	427	485	337	362	219	249
Spain	Intra_	122	250	1237	1513	1332	1087
	Extra_	2287	1982	10323	8369	30797	7734

Source: Eurostat, CD/ROM 3_1993, 3_1994, 1_1995.

EU imports of natural honey by country of origin (V: ECU '000; Q: metric tons)

Partner countries	1991		1992		1993	
	Q	V	Q	V	Q	V
Total	156230	155858	168635	169292	n.a.	n.a
Extra_EU	131629	115718	144996	129741	145257	106246
Intra_EU	24601	40139	23637	39549	n.a.	n.a
Argentina	27345	22733	38882	31609	31460	25938
Mexico	36590	30176	30219	25857	25050	21858
China	13351	11013	24823	19866	28712	19304
Germany FR	10326	16666	11123	18793	n.a.	n.a
Cuba	7393	5649	9425	7380	25601	3316
Hungary	7750	9204	4855	6521	9121	8793
France	4234	7057	3176	5936	n.a.	n.a
Belgium_Luxembourg	2929	4012	4276	5719	n.a.	n.a
Uruguay	2884	2348	5596	4750	4326	3671
Spain	115	6413	2748	4685	n.a.	n.a
Turkey	793	1831	2119	4070	2036	3224
Australia	6365	5430	4405	3841	3365	3000
Czechoslovakia	6502	5971	2674	3189	–	–
Canada	3627	4069	2687	3093	2633	2983
Czech Republic	–	–	–	–	1513	1813
Slovakia	–	–	–	–	197	305
Slovenia	–	–	–	–	58	105
El Salvador	1283	1028	2771	2574	1475	1520
Poland	1791	2215	1219	1766	507	1253
New Zealand	1011	1621	1226	1709	697	1008
Guatemala	953	929	1510	1580	1407	1619
Russian Federation	–	–	2178	1465	1111	729
USA	1499	1672	935	1310	652	855
Netherlands	453	908	637	1152	n.a.	n.a
ex_USSR	7751	5026	1662	1152	–	–
United Kingdom	824	1449	711	1124	n.a.	n.a
Bulgaria	616	735	999	1115	1485	1379
Denmark	514	1092	430	943	n.a.	n.a
Romania	574	712	626	720	736	819
Japan	0	1	821	701	99	88
Others	4228	5420	2859	3443	1412	1414

Source: Eurostat, CD-ROM Supplement 2_1991, 11_12_1991,3_1993, 3_1994, 1_1995.

Annex III

List of agents, importers and packers

1. Germany

a) Agents

H.E. Hansen GmbH & Co. KG
12 Rathausstraße
20095 HAMBURG 1
Tel: (040) 324 142
Tlx: 022162597 hans d

E.A Springer GmbH & Co.
Steindamm 87
20099 HAMBURG 1
Tel: (040) 241 366
Tlx: 2162550 easp d

Adolf Determan
1 Auf dem Sande
Freihafen
20457 HAMBURG 11
Tel: (040) 465 041 - 42
Tlx: 2213550 abeja d

Standard Übersee Handels GmbH
3 Rothenbaumchaussee
20148 HAMBURG
Tel: (040) 441 041
Tlx: 2 11596

Bahnsen & Prigge
Hauptstraße 4
P.O. Box 1137
21279 HOLLENSTEDT
Tel: (041) 658 1021
Fax: (041) 6580993

Schumacher GmbH
Halsestraße 1
21465 REINBEK
Tel: (040) 722 6054 - 56
Fax: (040) 7229254

b) Importers

Robert Krämer
58 Contrescarpe
Postfach 103906
28195 BREMEN
Tel: (0421) 320 059
Tlx: 244739 rokra d

Albert Johann Meyer GmbH & Co. KG
56 Slevogtstraße
Postfach 103247
28209 BREMEN 1
Tel: (0421) 342 911
Tlx: 245531 ajm d

Joh. Gottfr. Schütte & Co.
16 - 17 Bornstraße
Postfach 101707
28195 BREMEN
Tel: (0421) 30421
Tlx: 244140 jgsc d

Hans Sommer GmbH & Co. KG
4 Kohlhöckerstraße
Postfach 101429
28203 BREMEN 1
Tel: (0421) 701 040
Tlx: 244437 haso d

Tuchel & Sohn GmbH
Nahrungsmittel-Fabrik
1 Nigen Rügen
22159 HAMBURG 1
Tel: (040) 643 006-9
Tlx: 2174 553 tuso d

Alfred L. Wolff GmbH & Co. Hanseatische
13 Gr. Bäckerstraße (Sudanhaus)
20095 HAMBURG 1
Tel: (040) 362 971
Tlx: 2 11778 arabi d

Jebsen & Jessen GmbH & Co. KG
Postfach 103329
20095 HAMBURG
1 Tlx: 2162139

Bey & Co.
9-11 Tannenallee
21465 Reinbek-Neuschönningstedt Tel: (040) 33014-
b. HAMBURG
Tel: (040) 711 0091
Tlx: 211918 habey d

c) Packers

Eden-Waren-GmbH
107 Königsteiner Straße
Postfach 105
65812 BAD SODEN/TAUN
Tlx: 415639 eden d

Fauser Vitaquellwerk KG
60 Pinneberger Chaussee
Postfach 540629
Tel: (040) 575 057
Tlx: 211803 vita d

Fürsten-Reform
Dr med. Hans Plümer Nacht. Gn & Co. KG
2 Am Salgenholz
33110 BRAUNCHWEIG-WENDEN
Tel: (05307) 2371-72
Tlx: 952485 biof d

F. Göbber & Co.
40 Bahnhofstraße
27324 EYSTRUP
Tel: (04254) 841 113
Tlx: 0249314

H G Sanders
22 Birtstraße
22041 HAMBURG-WANDSBEK
Tel: (04322) 2622

Rothbuch KG
Dr. Gerhard Todenhöfer
10 Düsseldorfer Straße
Postfach 2307
72072 TÜBINGEN
Tel: (07071) 32065
Tlx: 7262802 rotb d

Max Nook
138 Jülicher Landstraße
41464 NEUSS
Tel: (02101) 42018-19

E. Otto Schmidt
30 Zollhaus-Straße
90469 NÜRNBERG 50
Tel: (0911) 83360
Tlx: 623865 eos d

Sonnland Nahrungsmittel GmbH & Co. KG
28 Berger-Kreuz-Straße
81735 MÜNCHEN

Sonnentau
Gebr. Winkelmann KG
15 Bahnhofstraße
Postfach 120
27374 VISSSELHÖVEDE
Tel: (04262) 75153
Tlx: 24303 sontau d

Honig-Müngersdorff GmbH
37 St. Agatha-Str.
Postfach 25
51149 KÖLN
Tel: (0221) 213 810

Breitsamer + Ulrich GmbH & Co. KG
28 Berger-Kreuz-Straße
81735 MÜNCHEN 83
Tel: (089) 400 305
Tlx: 523966 brulm d

Bernhard Holtrup GmbH & Co. KG
16 Merkureck
Postfach 3611
48165 MÜNSTER
Tel: (02501) 6660
Tlx: 892178 honig d

Inter Planing GmbH
Am Bahndamm
63683 ORTENBERG
Tlx: 410 2122

Gühler & Schwabe's Bienenhonig GmbH
Postfach 44
64658 KRUMBACH
Tel: (082) 83834

Albert Claussen
Post Reinfeld (Holstr.)
23858 WESENBERG
Tel: 04533/252

Rudolf Klein OHG
2 Eichendorfer Straße
94424 ARNSTORF
Tel: (08723) 1258
Tlx: 58826 klein d

Dreyer Beienenhonig
Rheinhold Dreyer
6 Auf der Masch
31110 UELZEN
Tel: (0581) 73498
Tlx: 91393

2. Italy

a) Importers

Abramo Bruzzone
Via La Spezia 8
16149 GENOVA
Tel: (010) 646 9726

Antonio di Palo S N C
Via Beato Franco Cristiano 4
80144 NAPOLI
Tel: (081) 736 5979

Germinal Italia S R L
Via Guido Rossa 51
25060 Cellatica

Tel: (030) 277 1870

Grosserbe SRL
Via Viadagola 14
40057 Granarolo Dell'Emilia BRESCIA
BOLOGNA
Tel: (051) 767 757

Natura Holding Italiana - Società per azioni
Via Tirreno 129
10134 TORINO
Tel: (011) 965 2384

Pili Gianni
Via Vittorio Emmanuele 40
08039 TONARA

Porrini Domenico & Co.
Via Vignetta 19
21020 Brebbia
VARESE
Tel: (033) 277 0472

Secondo Vergani SpA
Via Tacito 7
26100 CREMONA
Tel: (172) 0372 4331

b) Industrial users

Sperlari Fratelli SpA
Via Milano 16
26100 CREMONA
Tel: (0372) 410 541/27361
Tlx: 311106 sperl i
Dondi Lorenzo SpA
Via Buoso da Dovara 74
26100 CREMONA
Tel: (0372) 431251

Pernigotti Stefano e Figlio SpA
Viale della Rimembranza
15067 NOVI LIGURE (AL)
Tel: (0143) 76 631
Tlx: 211371 torron i
Plasmon Dietetici Alimentari SpA
Via Caldolini 26
20137 MILANO
Tel: (02) 548 4282/3/4/5

3. France

a) Packers/importers

Mellitag
Tour Mellita
215, rue La Fontaine
94120 FONTENAY-SOUS-BOIS
Tel: (161) 488 756 499
Tlx: 680848

Michaud Bernard Miel
Coteaux de Guindalos
BP 14
64110 JURANÇON
Tel: 598 25730/10
Fax: 598 25720

Raoul Duval & Cie
7, pl. Léon Meyer
76067 LE HAVRE
Tel: 35 210 276 / 35 196 600
Fax: 35 215 831 / 35 228 046

La Ruche Roannaise
Ets. Besacier
6-8, rue Jean Mermoz
42300 ROANNE
Tel: 77 671733
Tlx: 340810 Beemiel

Dardennes
BP 3
33770 SALLES
Tel: 5680 4088
Tlx: 570528 F Agitelex

Etienne Trubert
38, Faubourg-La-Grappe
28000 CHARTRES
Tel: 3728 0476

Ser La Rochefontaine
42, av. de la Grande Armée
75017 PARIS
Tel: (1) 4380 2022

Perronneau-Cronn Gabriel
Production Apicole
54, rue Larrey
21004 DIJON
Tel: 8041 0186
Fax: 8045 2326

Miel Villeneuve
BP 42
45202 MONTARGIS CEDEX
Tel: 38 853 152

Comptoirs Des Miels
6, rue Marcel Dessault
93360 NEUILLY PLAISANCE
Tel: (1) 4300 1616
Tlx: 680848
Fax: (1) 4300 6011

Coredisse
11, rue Tronchet
75008 PARIS
Tel: (1) 4742 7716

Dietetique et Santé
BP 106
31250 REVEL
Tel: 6127 6444
Tlx: 530985
Fax: 6183 1525

4. United Kingdom

a) Agents/importers

Hybs Food international Ltd
55 Park Street
BRISTOL BS1 5NT
Tel: (0272) 222 91406
(Consumer-packed honey)

Johnson Tamlyn
12 Bessmer Park
Milkwood Road
LONDON SE24 0HG
Tel: (071) 737 6608
Fax: (071) 737 6543

Etco International Commodities Ltd
Bedford House
125-133 Camden High Street
LONDON NW1 7JR
Tel: (081) 485 4100
Tlx: 25307

Kimpton Brothers Ltd
Berkshire House
168-173 High Holborn
LONDON WC1V 7AF
Tel: (071) 379 6422
Fax: (071) 240 8726

Jack Israel
JLI House, Guildford Street
Chertsey
SURREY KT16 9ND
Tel: (0932) 569600
Tlx: 262966 israel g
Fax: (0932) 569582/3/4

Fuerst Day Lawson Honey Ltd
St. Clare House
30-33 Minories
LONDON EC3N 1LN
Tel: (071) 488 0777
Tlx: 89522097
Fax: (071) 480 7567

b) Packers

Artts of Comber Ltd
Belfast Road
BELFAST
N. Ireland
Tel: (0247) 872 260

Petty Wood Co. Ltd
Telford Industrial Estate
Rothwell Road
Kettering
NORTHANTS. NN16 8UN
Tel: (05) 368 3334

Blands Honey
West End Lane
Oldbury-on-Severn
NR. BRISTOL BS12 1PS

Honeysuckle Foods Ltd
Station Road Estate
Wallingford
OXFORD OX10 0HX
Tel: (0491) 32373
Fax: (0491) 26183

Church Farm Apiaries Ltd
5 Main Street
Little Thetford, Ely
CAMBS. CB6 3HA
Tel: (0223) 538 922

The Garvin Honey Co. Ltd
158 Twickenham Road
Isleworth
MIDDLESEX TW7 7DL
Tel: (081) 560 7171

Manley Ratcliffe and Co. Ltd
Tower Road
Berinsfield
OXFORD OX9 8LQ
Tel: (0865) 340 171
Tlx: 83483 Manley
Fax: (0865) 340 738

West Country Honey Farms Ltd
Braeside
West Horrington
Wells
SOMERSET BA5 3ED
Tel: (0749) 72440

Nelson Preserving Co. Ltd
Long Lane
Aintree
LIVERPOOL L9 7BN
Tel: (051) 525 1606

5. The Netherlands

a) Importers/packers

De Traay B.V
Traaiweg 10
3956 NP LEERSUM
Tel: 343 454 375
Fax: 323 254 470

Honingzemery Pieterburen
Hoofdstraat 77
9968 AB PIETERBUREN
Tel: 595 2320
Fax: 595 2385

De Rit B.V
Retserystraat 4
4011 JP ZOELLEN
Tel: 3448 1653
Fax: 3448 1404

M C Foods
Houtlaan 21
PO Box 23375
3001 KJ ROTTERDAM
Tel: (10) 213 0488
Fax: (10) 411 6545

Honingzemery "Het Zuiden" B.V
Ladonkseweg 9
PO Box 2
5280 AA BOXTEL
Tel: 411 672 306
Fax: 411 673 250

Bijenstand Firma H T van Dam & Zn.
P W Janssenweg 35-37
8411 XR JUBBEGA
Tel: 516 51839
Fax: 516 51839

Bijenstand Mellona B.V
Bloemendaalsestraatweg 147
2082 GD SANTPOORT-ZUID
Tel: (23) 377 241
Fax: (23) 382 810

Pylstra B.V
Jan Tomstraat 2B
PO Box 2655
2940 AD LEKKERKERK
Tel: 1805 1377

Honey - Overview of the USA market

Product description

HS 0409.00 Natural honey

Production

The United States has a highly developed beekeeping industry and is the second largest honey producing country in the world, after China. California, Florida, North Dakota, South Dakota and Minnesota account for over half of US honey production. Since 1988 the number of producing colonies has declined, while honey yields per colony have increased. Production in 1993 decreased by about 10% compared with 1992, largely due to losses caused by floods in the Midwest.

Trade

During 1989-1993, US imports increased considerably and in 1993 were almost double the 1989 level. Exports remained relatively steady over the period under review.

US trade and production of honey (Q: metric tons; V: US\$ '000)

Year	Imports		Exports		Production	Apparent consumption
	Q	V	Q	V	Q	Q
1989	35,049	30,247	4,512	6,333	80,266	110,803
1990	34,993	33,455	5,638	7,108	89,717	119,072
1991	41,797	43,563	4,336	6,810	99,840	137,301
1992	51,994	53,924	4,728	7,154	100,245	147,511
1993	60,615	57,907	3,874	6,118	90,000	146,741

Source: ITC, UNSTAT/Comtrade.

Main origins of imports

The main suppliers of honey to the USA are China, Argentina, Canada and Mexico. Imports are rising as domestic production is unable to meet the demand. Annex I shows that since 1990 China and Argentina have increased their market share (respectively 50% and 27% in 1992 and 57.4% and 26.9% in 1993).

Exports

Exports of honey from the USA are small in terms of world trade in this product. Principal US honey markets are Saudi Arabia, Yemen and Canada. US exports of honey have been assisted by the Market Promotion Programme (MPP), which is administered by the Foreign Agricultural Service. The National Honey Board (NHB) applies for MPP funds, and together they promote a programme to develop consumer and trade awareness for consumer-packed speciality honey in markets in the Middle East and Northern Europe.

Market characteristics

In the United States, an estimated 60% of honey consumption takes place in the home. Consumers generally prefer liquid honey, and only small quantities of creamed honey are sold on this market. There is a strong preference for the lighter honeys i.e. classified as Extra Light and Lighter. Figures

available for 1991-1992 of US honey imports by class show that about 67% is of this very light variety, while that classified as Light Amber is regarded as a dark honey on this market and mostly used for industrial purposes.

Since the US has a Honey Price Support Programme 2, domestic production is protected. The amount of honey imported and its price during any given year are directly affected by the conditions of the US crops and thus the market. Under this scheme, local producers are guaranteed a fixed minimum price, making competition for exporters even stronger. Potential suppliers should therefore note that a sufficient quantity of honey is necessary to warrant exporting to the US market since so many factors condition this market.

Market access

Under the Tariff Schedules of the United States, a rate of 2.2¢ per kilo is applied to imports of honey from all countries, except Israel, Andean countries and countries belonging to the Caribbean Basin Initiative which have duty free entry. A rate of 6.6¢ per kilo is applied to honey from Afghanistan, Azerbaijan, Cuba, Kampuchea, Lao PDR, Republic of Korea, Romania, Tajikistan, Uzbekistan and Vietnam. No quantitative restrictions apply, however, under Section 406 of the Trade Act of 1974, the President of the United States has the authority to impose import relief measures on products from communist countries when the International Trade Commission determines such imports cause market disruption.

Trade channels

Compared with other major honey markets, comparatively few companies in the USA appear to import direct, most of the trade being handled by specialized importers. Once packed for retail, the honey reaches the consumer through the normal foodstuff distribution channels.

(2) In 1949 the US Honey Price Support Programme was established to enable beekeepers to obtain certain minimum prices for their honey through a loan programme. This was amended by the 1993 Agricultural Reconciliation Act. The 1993 Act reduced the minimum honey loan rate by 3.8 cents a pound for the 1991-1995 crop, making it 50 cents a pound for the 1994 and 1995 crops, 49 cents for the 1996 crop, 48 cents for the 1997 crop and 47 cents for the 1988 crop. The honey is used as collateral and the producer is responsible for storing the honey. While the government does not actually take possession of the honey, producers are not allowed to sell it until the loan is repaid. The loan matures nine months after it is issued and the rate of repayment may change at any time if market conditions so warrant. Producers eligible for price support loans can instead choose to receive loan deficiency payments for each crop year limited to \$125,000 for 1994 (currently eliminated), \$100,000 for 1995, \$75,000 for 1996 and \$50,000 for 1997 and 1998.

Market prospects

Although there are no quantitative restrictions on honey imports and customs duties are fairly low, the modified honey price-support programme will have a significant influence on imports. Since domestic production is relatively stable, the USA relies more and more on imports of honey to meet its growing demand. New suppliers may find it difficult to penetrate the market, but as the USA will remain one of the world's largest import markets, suppliers of good quality honey that meet market requirements should still be able to export considerable quantities to this market.

Useful addresses

Associations

American Beekeeping Federation
P.O. Box 1038
Jesup GA 31545-1038
Tel : 912 - 427-8447
Fax : 912 - 427-8447
*(Formerly National Federation of Beekeepers
Associations. Absorbed the Honey Industry
Council of America in 1986)*

American Honey Producers Association
P.O. Box 584
Cheshire, CT 06410-0584
Tel : 203 - 250-7575
Fax : 203 - 250-7575

Apiary Inspectors of America
Maryland Dept. of Agriculture
50 Harry S. Truman Pkwy.,
Annapolis, MD 21401
Tel : 410 - 841-5920
(Formerly National Apiary Inspectors)

National Honey Packers and Dealers
Association
P.O. Box 776
5 Ravine Drive
Matawan, NJ 07747-0776
Tel : 908 - 583-8188
Fax : 908 - 583-0798

Divisions of the US Department of Agriculture

Foreign Agricultural Service
US Department of Agriculture
Room 4644 - S
Washington D.C., 20250-1000

Secretary of Agriculture
US Department of Agriculture
Washington D.C., 20250
Tel: 202 - 720-7327/1127

For specific information, contact also the Horticultural Products Division, and for information on production, contact the Production Estimates and Crop Assessment Division.

Annex I

US imports of natural honey, by country of origin

Q: metric tons	1989	% share	1990	1991	1992	1993	% share
Total	35,050	100	34,944	41,846	51,994	60,615	100
China	11290	32.2	11545	20334	27251	34823	57.4
Argentina	4746	13.5	8817	9269	14129	16338	26.9
Canada	12422	35.4	3454	6425	7624	5431	8.9
Mexico	2968	8.4	7340	3559	2148	2161	3.5
Australia	0.093	0.2	1126	0.059	0.012	1134	1.8
Germany	0.381	1	0.155	0.113	0.094	0.098	0.1
Dominican Republic	0.185	0.5	0.179	0.104	0.215	0.194	0.3
New Zealand	0.002	–	0.022	0.013	0.077	0.069	0.1
Guatemala	0.176	0.5	0.232	0.113	0.125	n.a.	n.a
Hong Kong	0.142	0.4	0.126	0.024	0.072	0.13	0.2
Switzerland *	0.167	0.4	0.094	0.026	0.025	0.072	0.1
United Kingdom	0.035	0.1	0.052	0.008	0.007	0.018	–
France	0.031	–	0.033	0.027	0.019	0.011	–
Japan	0.031	–	0.049	0.24	0.071	n.a.	n.a
Brazil	0.191	0.5	0.083	n.a.	n.a.	n.a	n.a
ex_USSR	0.819	2.3	0.285	0.064	0.015	n.a.	n.a
Hungary	1236	3.5	1127	1183	0.001	0.028	–

n.a.: not available

* Data for Switzerland include the Principality of Lichtenstein

Source: US Department of Commerce, Bureau of the Census, ITC/UNSTAT/Comtrade.

Annex II

LIST OF IMPORTERS/PACKERS (non-exhaustive)

All World Foods
229 Castro Street
Oakland, CA 94607-3011
Tel : 510 - 832-8833

Barkman Honey Co., Inc.
P.O. Box 123
Hillsboro, KS 67063
Tel : 316 - 947-3173
Fax : 316 - 947-3640

Blossom Farm Products
12 Route 17, N.
Paramus, NJ 07652
Tel : 201 - 587-1818
Fax : 201 - 587-0310

Elki Corp.
2215 Merrill Creek Pkwy,
Everett, WA 93203
Tel : 206 - 261 1002
Fax : 206 - 261 1001

Equal Exchange, Inc.
101 Tosca Dr.
Stoughton, MA 02072
Tel : 617 - 344-7227
Fax : 617 - 344-7240

Everlink International
20620 Leafwood Ave, Ste. P.,
Carson, CA 90746 - 3613
Tel : 310 - 323 8875

Great Health, A California Corp.
2663 Saturn St., P.O. Box 1749
Brea, CA 92622
Tel : 909 - 996-8600

Hing Mau
1040 Manukea St.
Honolulu, HI 96817-5129
Tel : 808 - 538-6544

Kraft Food Service
2101 91st St.
North Bergen, NJ 07047
Tel : 201 - 854-1100
(Packer)

Amford
500 S. Monterey Pass Road
Monterey Park
CA 91754-2417
Tel : 818 - 281-5702

Bee Natural Honey Co., Inc.
14240 S.W. 256th St., P.O. Box 4085
Princeton, FL 33032
Tel : 305 - 258-1110
Fax : 305 - 258-5580

Concord Foods, Inc.
Avon Industrial Pk.
Avon, MA 02322
Tel : 508 - 580-1700

European Continental Imports
3425 Caniff St.
Detroit, MI 48212
Tel : 313 - 891-6510
Fax : 313 - 891-4249

Evergreen Produce, Inc.
6333, 212th St., S.W., Ste B,
Lynnwood, WA 98036
Tel : 206 - 775 5508
Fax : 206 - 778 6511

Great Rich Trading
130 3rd St.
Brooklyn, NY 11231-4823
Tel : 718 - 643-9550

Haram-Christensen Corp.
125 Asia Pl.
Carlstadt, NJ 07072
Tel : 201 - 507 8544
Fax : 201 - 507 0507

Impex Group
P.O. Box 206
Tustin, CA 92681-0206
Tel : 714 - 544-3911

International Oriental Foods
47 Vestry St, New York
NY 10013 - 1715
Tel : 212 - 374 1115

L/M Animal Farms, Inc.
10279 State Rte. 132, P.O. Box 57
Pleasant Plains, OH 45162
Tel : 513 - 877-2131
Fax : 513 - 877-2134

Masterpeace Food Imports
415 Bedford Road
Pleasantville, NY 10570-3014
Tel : 914 - 769-7148

Mega Marketing and Brokerage, Inc.
14240 S.W.256th St.
P.O.Box 4085
Princeton, FL 33032
Tel : 305 - 258 1110
Fax : 305 - 258 5580

Mon Chong Long Trading
4716 Austel Pl.
Long Island City, NY 11101-4440
Tel : 718 - 392-8735

New Wave Transport
2417 E. Carson St.
Long Beach, CA 90810-1231
Tel : 310 - 518-0098

Pure Sweet Honey Farm, Inc.
514 Commerce Pkwy.
Verona, WI 53593
Tel : 608 - 845-9601
Fax : 608 - 845-9628

Strohmeier & Arpe Co.
636 Morris Tpke.
Short Hills, NJ 07078
Tel : 201 - 761-7600

Sugarbrush Products, Inc.
117, Bristol Rd, Chalfont
PA 18914
Tel : 215 - 822 1495
Fax : 215 - 997 2519

Sun Fat Trading Co.
2240 Quimby Rd, San José
CA 95122
Tel : 408 - 270 0505

Trans Ocean Bridge Service
9040 Telstar Ave.
El Monte, CA 91731-2831
Tel : 818 - 280-6898

Liberty Richter, Inc.
Park 80, W., Plaza 1
Saddle Brook, NJ 07662
Tel : 201 - 843-8900
Fax : 201 - 368-3575

Miller's Honey
P.O. Box 5000
Colton, CA 92324-0500
Tel : 909 - 825-1722
(Packer)

Mitsubishi International Corp.
2100 Riveredge Pkwy., N.W., Ste. 475
Atlanta, GA 30328-4677
Tel : 404 - 859-0069

Neiman Brothers Co., Inc.
3322 W. Newport Ave.
Chicago, IL 60618
Tel : 312 - 463-3000
Fax : 312 - 463-3181

Pica Trading Co.
P.O. Box 882344
San Francisco, CA 94188
Tel : 415 - 467 3155
Fax : 415 - 467 3275

Silverbow Honey Co., Inc.
1120 E. Wheeler Rd.
Moses Lake, WA 98837
Tel : 509 - 765-6616
Fax : 206 - 568-7633

Sunland International
22 East Ave.
New Canaan, CT 06840-5516
Tel : 203 - 966-4166

Sun Country Honey Co.,
Div. of Tinman
800 Rankin Rd, NE
Albuquerque, NM 87107
Tel : 505 - 345 8401
Fax : 505 - 345 0492

Tastevin Wine
1000 Carleton St., Berkeley
CA 94710 - 2614
Tel : 510 - 644 3373

United Cargo Management
15511 146th Ave.
Jamaica, NY 11434-4272
Tel : 718 - 341-0694

Weber Co., Jacques F.
2845 Polk St., San Francisco
CA 94109
Tel : 415 - 474 5343
Tel : 415 - 342 9495

Westlake Development
520 S. El Camino Real
San Mateo
CA 94402 - 1726

R B Willson Inc.,
222 Mamaroneck Ave.
White Plains, NY 10605
Tel : 914 - 949 5888