

EU MARKET SURVEY 2002

HONEY AND BEESWAX



CENTRE FOR THE PROMOTION OF IMPORTS FROM DEVELOPING COUNTRIES

EU MARKET SURVEY 2002

HONEY AND BEESWAX

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Ceres Company
INTERNATIONAL MARKETING
OF FOOD AND AGRICULTURAL PRODUCTS

In cooperation with
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REPORT SUMMARY

This EU market survey profiles the EU market for honey and beeswax. The emphasis of the survey lies on those products, which are of importance to developing country suppliers. The major national markets within the EU for honey and beeswax are Germany, France, Italy and the United Kingdom. These countries will be highlighted together with The Netherlands.

The survey includes contact details of importers, trade associations, and other relevant organisations. Furthermore, statistical market information on production, imports and exports and information on trade structure, prices and margins is provided.

As an exporter, you need this information in order to formulate your own market and product strategies. To assist you with this, CBI has developed a matching EU Strategic Marketing Guide 'Honey and beeswax'. It offers a practical handbook for exporters engaged, or wishing to engage, in exporting honey and beeswax to the European Union. It aims to facilitate exporters in formulating their own market and product strategies, through the provision of practical information and a methodology of analysis and ready-to-fill-in frameworks.

As mentioned above, statistical market information on production and trade, and information on trade structure, prices and margins, which is required for the ready-to-fill-in frameworks, can be found in this EU Market Survey.

Market research

This EU Market Survey and the EU Strategic Marketing Guide serve as a basis for further market research: after you have read this survey and then filled in the frameworks in the strategic marketing guide, it is important to further research your target markets, sales channels and potential customers.

Market research depends on secondary data (data that have been compiled and published earlier) and primary data (information that you collect yourself).

An example of secondary data is this EU Market Survey. Primary data are needed when secondary data fall short of your needs, for example when researching your specific type of consumer about the acceptance of your specific product. Sources of information are, among others, (statistical) databanks, newspapers and magazines, market reports, (annual) reports from branch associations, but also shops in target countries, products or catalogues from your competitors, and conversations with suppliers, specialists, colleagues and even competitors. After you have received/collected your information, you should analyse it. In order to

judge the attractiveness of the market, sales channel or customer, you should use/develop a classification or score system.

For more detailed information on market research, reference is made to CBI's Export Planner (2000).

Emphasis in this survey is placed on honey, as the EU is a large importer of this product from developing countries.

Consumption

Honey consumption in the EU is about 260,000 tonnes and was stable to increasing during the period 1998 – 2000. It is estimated that about 85 percent (221,000 tonnes) is sold in retail packaging directly to consumers. 15 percent (39,000 tonnes) is sold as ingredient to industrial users.

Per capita consumption of honey in the EU countries is average 0.7 kg per annum. However, consumption varies widely amongst individual countries: from Greece with 0.3 kg per capita to Germany with 1.8 kg per capita.

Beeswax has a wide range of uses for consumer and industrial products. Though in many cases beeswax can be replaced by cheaper, synthetic waxes, its very special characteristics, medicinal benefits, plasticity and aroma ensure its continuing use. The application of more natural ingredients in for example cosmetics and food also increases its use. For this purpose modified beeswax, with improved properties, is also being produced. Most nationally produced wax in EU countries is used by beekeepers for foundation sheets.

Trends

The grocery industry in the EU is characterised by increasing competitive pressures and a concentration of buying power by the major multi-European retail chains. On the demand side, consumers reveal increasingly sophisticated needs related to the nutritional content of products, time saving in preparation, product information and animal welfare. Food safety issues play a particularly strong role after the various food crises the EU has experienced during the last few years. Tracing and tracking of ingredients for food products becomes an integral part of a closed food chain, where the products are registered and followed from farmer to table.

Honey consumption increases in most countries, but data are not available. In countries where honey was used mainly as a home remedy or in cough syrup, there is a trend in using it also as a health food.

The use of beeswax in natural medicine, physiotherapy and food products increases. The raw material producers for the cosmetic industry tend to make modified beeswax products, with improved properties.

Production

111,000 tonnes of honey was produced in the EU in 2000, a decrease of five percent compared to 1999. Global honey production amounted to 1,173,000 tonnes in 1999. The EU was the third largest producer in 1999 after China with 214,000 tonnes and the Community of Independent States with 134,000 tonnes. Other major producers were the United States (101,000 tonnes) and Argentina (85,000 tonnes). Honey production in the EU is insufficient to cover demand, so that about half of the honey consumed has to be imported from non-EU countries. In The Netherlands, only 10 percent of the consumption is produced locally and 90 percent is imported. Honey production in the EU has been rather fairly as from 1997.

There are no official figures regarding the production of beeswax in the EU, but production is estimated at between 1,000 – 1,500 tonnes per annum. In The Netherlands, the total beeswax production is estimated at 6 tonnes. This equals the quantity of wax foundation used by beekeepers. Germany, Spain, Italy, France and Greece are the main beeswax producing countries in the EU.

The honey production from beekeeping in Nepal, China and Vietnam increased enormously during the last few years.

Imports

Between 1998 and 2000, imports of natural honey by EU member countries remained stable from 192,642 tonnes to 192,791 tonnes. However, in terms of value, imports decreased by 24 percent during the period 1998 – 2000: from US\$ 300 million in 1998 to US\$ 228 million in 2000. One reason is probably a shift to polyfloral honey at the cost of monofloral honey like robinia, which is becoming scarce. Another likely reason is that more cheap honey from East Europe is imported following the collapse of communism in 1990. Production in these countries has increased, due to land use liberation, opportunities for commercial activities and the possibility of exports.

There is a shift in imports from Italy, Spain and Portugal in favour of East European countries like Poland, Hungary, Romania, Bulgaria and Ukraine. The prices were at first very low, but have increased during 2001. Another reason is the addition of India as a honey exporting country mainly to Germany. Low quality honeys from India and China are either

mixed with better honeys (with low HMF) or made in Germany or Austria into honey jelly and honey powder (dried honey products) for the cosmetic industry. So, a shift to industrial products is also a possible explanation. Honey cosmetics are produced in Austria and Italy.

Exports

Exports of honey from EU countries mainly take place to other EU countries. In 2000, the value of exports from EU countries was US\$ 89 million, of which US\$ 16 million was exported to non-EU countries. Germany is the largest exporting country and with US\$ 35 million in 2000 was responsible for 39 percent of total EU exports. Spain is the second largest exporter of honey with US\$ 16 million (18%). Although export volume increased constantly from 43,975 tonnes in 1998 to 48,472 in 2000, export value decreased from US\$ 102 million in 1998 to US\$ 89 million in 2000.

Exports of crude beeswax and other insect waxes from EU countries were small during the period under review. In 2000, a total of US\$ 2.2 million was exported, of which US\$ 1 million to non-EU countries. Germany was the largest exporting country in 2000 with US\$ 1.3 million, accounting for 58 percent of total EU exports, followed by Belgium with US\$ 0.7 million (31%).

Trade structure

Trade channels for honey and beeswax are completely different. As beeswax can be stored for a long time it can be traded more easily than honey. Honey is imported directly from honey export cooperatives in developing countries, while beeswax can be bought from different traders.

As an estimated 85 percent of honey sold in the EU as consumption honey, retailers and beekeepers are important channels of distribution to the consumers. Importers of honey usually add value to the product by processing and packing in retail units. Three distinct types of packers can be identified for the honey sector in the EU:

- Packer-producers: beekeepers with facilities for processing and packing of honey. They sell directly to consumers, usually from their premises, or to retailers in the vicinity. They are often small businesses and they do not market imported honey.
- Packer-cooperatives: groups of beekeepers that purchase, process, pack and market honey, often under their own label. They sometimes purchase imported honey.
- Packers: they purchase honey both from beekeepers and importers. They have their own brand label and they also pack honey for other brands. Moreover, they supply retailers with their private label brands.

Opportunities for exporters in developing countries

Opportunities for exporters in developing countries lie in the following fields:

- *Organic honey*
Although still a small segment, the market for organic ingredients is expected to grow substantially in the coming years.
- *Special honey*
Consumers in the EU market who originate in countries outside the EU form an increasing part of the EU population. They may prefer their own country-special honey types, like dark amber 'medicinal' honey or bitter honey
- *Other hive products*
Although still a small segment, the market for pollen, royal jelly, propolis and bee venom is expected to grow substantially in the coming years
- *Integrated chain control*
Tracing and tracking of food products is increasingly required by food processors in the EU. Suppliers in developing countries who have a system of tracing and tracking, supported by documentation have a competitive advantage in dealing with EU importers.

- *HACCP and ISO certification*

Suppliers who have the above-mentioned certification in the future will have a major competitive advantage, as these certifications provide guarantees on quality assurance and food safety.

- *Logistics*

Processors/importers in the EU set high standards in respect of the logistical system of exporters. Suppliers of honey and beeswax in developing countries who form partnerships with strong and well-organised shippers to EU countries are in a better position to meet the requirements of customers in the EU.

CBI services

The EU Strategic Marketing Guide "Honey and beeswax" provides exporters in developing countries with practical information on entering the EU market. The guide describes requirements for access in the EU, terms of trade, trade promotion and marketing guidelines.

For information on CBI programmes, training and seminars and for downloading market information and CBI News Bulletins, please go to the Internet site www.cbi.nl

1. PRODUCT CHARACTERISTICS

1.1 Product groups

In the world trade, honey and beeswax are historically and presently the most important commodities originating in honeybee colonies. They represent the highest weight in hive produce. Another hive product, propolis, was traded in past centuries as an ingredient for paint and varnishes. Adult honeybees have been used, by means of extraction with alcohol, for ages to make the so-called mother tincture known as Apis. In the last decennia, an enormous increase in trade of other products takes place, particularly those that can be used in health food and food supplements, or in natural medicine. Apart from being used pure, all bee products are manufactured into natural medicine or added to industrial products for internal and external use. Quantities of these products are less, but prices are much higher. Honeybee products are listed in the table below.

The trade in pollen, royal jelly, propolis and bee venom is closely connected to the trade in honey.

The trade in the product Apis is separate from honey, and moves along the line of pharmaceutical products. Bee venom partly follows the trade movements of honey, but can be traded as a pharmaceutical as well. Beeswax is traded totally separately from the other products, being an ingredient for a totally different market segment.

1.1.1 Honey

According to the Codex Alimentarius the definition of honey is as follows:

Honey is the unfermented, natural sweet substance produced by honeybees from the nectar of blossoms or from secretions of living parts of plants or excretions of plant sucking insects on the living parts of plants, which honeybees collect, transform and combine with

specific substances of their own, store and leave in the honey comb to ripen and mature.

Honey shall not have any objectionable flavour, aroma or taint absorbed from foreign matter during its production, harvesting, processing and storage and shall not contain natural plant toxins in an amount that may constitute hazard to health.

Nutritionally

Honey consists of different sugars, predominantly glucose and fructose, dissolved in water. It contains minor quantities of vitamins and minerals. The colour of honey varies from nearly colourless (white) to dark brown (amber), often coinciding with light or strong taste. The consistency can be fluid, viscous or hard, i.e. crystallized. The flavour and aroma vary, due to its geographical, vegetational and bee species origin, as well as beekeeping practices.

Therapeutically

Honey is valuable due to many other ingredients. Different substances have been identified in honey, of which some have never been found in other foodstuffs. Bio-active ingredients like enzymes (producing hydrogen peroxide), carotenoids, anthocyanes, volatile oils, trace elements, acids, constituents of propolis (flavonoids and ferulic acids), bee venom (mellitin and others) and royal jelly (enzymes and oligopeptides), pollen grains, air particles including fungi and other germs, as well as the high osmotic value are recognized in traditional or natural medicine as active agents in human and animal metabolism.

Medicinally

Honey is recognized as a natural medicine both for internal and external use (wound dressing).

Product	Form	Supplying countries
Honey	crude or industrial	Argentina, China
Beeswax	extracted	China, Ethiopia
Pollen	fresh or dried	Spain and Portugal
Bee bread	fresh or dried	Eastern Europe and Russia
Bee brood, drone brood	whole or separated	Eastern Europe and Russia
Royal jelly	fresh or lyophilized	China, Indonesia, Japan, New Zealand
Whole comb	with brood	Asia, Africa
Propolis	powdered or extracted in alcohol	Cuba, Brazil
Bee venom	pure or refined	Eastern Europe, USA, Canada
Bee stings	applied locally	Russia, USA, Cuba, India
Adult bees	extracted (Apis)	Africa, India,
	or mashed	Europe, USA
Whole hive odour	applied by inhalation	Eastern Europe
Pollination	setting hives in the crop field	Europe, USA, Canada

Due to the natural character and varying composition, however, honey cannot meet the legal requirements for the status of a medicine in most countries.

The therapeutic or medicinal use of bee products is called apitherapy. Recognition of honey as a health food is gaining field.

Quality

The quality of the honey is determined by its geographical origin (tropical, subtropical or from temperate zone), by the vegetation (forest, savannah) including the nectar source, by the season of production and by the bee species or subspecies. The beekeeping method further determines the honey quality.

Good seasonal management practices ensure full ripening of the honey and the absence of foreign substances or contaminating agents. The type of hive (traditional hives, fixed-comb hives, movable comb hives with or without chambers) may determine whether the honey is separated from the brood and whether the honey is stored in newly built combs, in old combs or in former brood combs.

The use of comb foundation, i.e. recycled wax, also makes a difference. It gives opportunity to the piling up of foreign materials like impurities, insecticide and acaricide chemicals or antibiotics (against bacteria). The time that the honey remains in the hive can affect colour and taste. The scent of the flowers from which the nectar has been gathered is present mainly in freshly harvested honey.

Processing

Honey is separated from the combs by draining, pressing or centrifuging. During further processing and packing, the honey is often heated to stop the fermentation by killing of the yeasts, to clarify the product and to avoid crystallization. Honey is an over-saturated solution of sugar in water, which leads sooner or later to crystallization, also called granulation, depending on the nectar source and its percentages of glucose and fructose. Some honeys have fine crystals, others coarse. To fluidize crystallized honey it is heated. Industrial methods for changing the product after production, harvesting and extraction are restricted by legislative rules. Addition or extraction of ingredients like water is not allowed and heating of honey is permitted only within certain limits of temperature and time. Honey is different from other foodstuffs through the presence of bioactive ingredients, i.e. enzymes. The absence or reduction of these essentially changes the original product. This can be measured by analytical methods used by the producer, importer or institutions for quality control.

The methods of processing honey are the following:

Drained honey: honey obtained by draining decapped broodless combs

Extracted honey: honey obtained by centrifuging decapped broodless combs

Pressed honey: extracted honey by pressing broodless combs with or without the application of moderate heat.

Honey can be sold in the following styles:

Comb honey: sold as it was produced as a whole within a container in the hive, without use of comb foundation. The comb as well as the honey is edible.

Cut-comb honey: unprocessed full honeycomb, cut into pieces.

Comb honey in fluid honey: Cut comb is inserted in fluid honey.

Chunk honey: honey containing one or more pieces of comb honey.

Crushed honey: honeycombs are mixed together and packed in polyethylene bags.

Liquid honey: honey that flows freely from the packing.

Jellied honey: viscous jellied 'standing' honey (monofloral heather honey).

Crystallized or granulated honey: honey that has undergone a natural process of solidification.

Creamy honey: honey with a fine crystalline structure, mashed which makes it and easy to spread.

Mead: honey wine and honey beer obtained by fermentation, stored in wooden vessels or bottled.

Honey can be distinguished by origin:

Geographically:	Temperate region honey, subtropical or tropical honey
	Part of the world or country: (African, Mexican or Chinese honey)
Bee species*:	Rock honey (honey of the rock bee)
Production:	Beekeepers' honey, wild honey, i.e. from feral colonies; organic honey
Vegetation/ ecology:	Forest, savannah, sahel, meadow, swamp, steppe, Sunderban honey
Nectar source:	Polyfloral, monofloral (with plant name like acacia, heather, manuka)
Part of the plant:	Blossom honey, Honeydew honey, Sugarcane honey (from the stem), Ant honey, Lice honey (honey made of plant juices extracted by these insects)

* Honey of species other than *Apis mellifera*, like stingless bee honey, does not comply in every aspect with the requirements of the Codex Alimentarius. Indication of the bee species can prevent that the honey is judged as *Apis mellifera* honey, according to regulations.

1.1.2 Beeswax

Beeswax is produced by worker bees, which secrete the wax from four pairs of glands on the ventral side of the abdomen. This forms the raw material honey. Bee milk or royal jelly is deposited in cells with young larvae, pollen is stamped into the cells, nectar is deposited in other cells or other parts of the comb and made into honey. Honey may be stored in freshly built combs, empty old combs or in former brood combs, which contain the membranes of the pupae.

The newborn bee (imago) leaves this behind after emerging. Before deposition of eggs, the cells are polished with propolis. Beeswax is a by-product of honey. It is taken from extracted honeycombs, old or damaged combs, stored combs and from the cappings that cover the cells containing honey. The cappings consist of primary wax, like newly combs made without comb foundation sheets.

Beeswax is purified by melting it with solar wax extractor (without water), straining, or on water bath or with steam extraction. It is separated from the water after cooling and solidification.

The wax represents 3-5 percent of the total weight of honeycombs. Beeswax is a very stable substance with lasting and constant properties. It is oxidation resistant, meltable in water and hardly affected by acids.

The composition and quality of the beeswax depend on the type of combs from which it is extracted, on the bee species, as well as the vegetational and geographical origin.

Due to the many different waxes and other ingredients present in beeswax with a variation of melting points, it has a melting curve instead of an exact melting point. It is mouldable at temperatures from 35°C to 40°C (human body temperature) and therefore particularly interesting for the cosmetic industry as an emollient, emulsifier and stiffening agent for oils and fats. Due to the high melting energy needed for fluidization, it adds to the properties of cosmetic products, making them more resistant to melting by sun heating.

Beeswax melted in water bath has to be pressed for removal of the membranes from brood combs. As wax still remains in the membranes, the process is often repeated several times. Solar wax extraction and steam extraction result in few residues of wax remaining in the membranes.

The standard physical properties of beeswax are mentioned in the table at the right.

1.1.3 Pollen and beebread

Pollen grains from the anthers of flowers stick to the thorax hairs of honeybees. They are combed off by the bee and, with addition of saliva, rolled into two balls. These are put into two pollen baskets at the hind legs, named pollen loads, and carried to the hive.

Pollen can be harvested with a pollen trap and be dried for human or animal consumption. It is rich in vitamins, trace elements, lipids, volatile oils, amino acids, oligopeptides, anthocyanes, carotenoids, ferulic acids and flavonoids.

Pollen loads are stamped with the bee head into cells of the comb and, with addition of saliva, ripened in about two weeks into the so-called beebread. Beebread can be harvested by extracting it from the comb and drying it in the sun or otherwise. Beebread contains all foodstuffs originating from pollen, but more vitamin C and enzymes. It is more easily digestible than pollen.

1.1.4 Royal jelly

Beebread is made into bee milk or royal jelly in the hypopharyngeal glands in the head of young bees. Pollen is partly digested with the addition of saliva and other glandular juices. Bee milk and royal jelly are fed to the young larvae of worker bees, drones and queen bees. It can be harvested from queen cups. Royal jelly is particularly rich in amino acids, oligopeptides, lipids and enzymes. The taste of fresh royal jelly is pungent. Royal jelly is consumed pure, in energy drinks, in capsules (lyophilized powder) and added to cosmetic creams for beauty.

1.1.5 Propolis

Honeybees make propolis from collected resins, gums and botanical waxes by mixing them with beeswax and their own saliva. Propolis can be harvested from the hive by using grids or scraping it off the wooden frames and hive walls. It can be powdered or be extracted with water or alcohol (ethanol) for use in food supplements, cosmetics or health-care products. Propolis contains flavonoids, ferulic acids and volatile oils. Propolis is also called bee gum or bee glue.

Property	Measurement
Melting curve	61 - 64°C
Cloud point	65°C
Flash point	242 - 250°C
Specific gravity at 25°C	0,950 - 0.960°C
Saponification value	88 - 102°C
Acid value	17 - 24°C
Ester value	72 - 79°C
Aster-acid ration	3.2 - 4.3°C
Iodine value	8 - 11°C
Refractive index at 75°C	1.4398 - 1.4451°C
Dielectric constant	3.1 - 3.3°C

1.1.6 Bee venom

When stinging intruders, bees inject venom from their venom sac into the skin of their victim. Venom can be harvested with a bee venom collection device, thereafter be dried and purified. Bee venom contains mellitin (40-60%) and other bioactive ingredients. Bee venom is used in small quantities in injection fluid for medicinal use, or in ointments and other health-care products. The handling of bee venom is not without risk and protection is needed.

1.2 Customs/statistical product classification

On January 1, 1988, a unified coding system was introduced to harmonise the trading classification systems used worldwide. This system is called the Harmonised Commodity Description System (HS) and was developed by the World Customs Organisation (WCO). The system comprises about 5,000 commodity groups. Each is identified by a six-digit code, arranged in a legal and logical structure and is supported by well-defined rules to achieve uniform classification. More than 177 countries and economies use the system as a basis for their Customs tariffs and for the collection of international trade statistics.

WCO is currently introducing alterations to the HS and these would be included in the combined nomenclature as of January 1, 2002. After the six-digit code, countries are free to use further subheadings. An 8-digit system is used in the trade data of Eurostat. Most codes, however, end with two zeros, i.e. effectively only using 6 digits. In some countries even 10 digits are sometimes used.

Table 1.1 gives the eight-digit list of the main HS codes for honey and beeswax.

The honey and beeswax varieties discussed in this survey can be found in Chapter 4 and Chapter 15 of the Harmonised System.

There is no breakdown in the coding for the different types of honey or for its presentation in the forms of combs, liquid or cream honey. The HS code does not differentiate between crude honey in bulk form and purified honey in consumer packaging. Although the term 'raw beeswax' is used in the HS code, the common term in the trade is 'crude beeswax'. Raw beeswax is wax extracted from the combs. It contains all kinds of impurities such as sand. Beeswax is purified by means of cooking and filtering.

Table 1.1 HS code classification of honey and beeswax

HS codes	Products
04 09 00 00	Natural honey
15 21 90 91	Raw beeswax and other insect waxes, whether or not refined or coloured
15 21 90 99	Beeswax and other insect waxes, other than raw, whether or not refined or coloured

2 INTRODUCTION TO THE EU MARKET

The European Union (EU) is the current name for the former European Community. Since 1 January 1995, the EU has consisted of 15 member states. Negotiations are in progress with a number of candidate member states, many of which already have extensive trade and cooperation agreements with the EU. It is envisaged that ten of these countries will become members in 2004.

According to the first demographic estimates for 2001, published on January 11, 2002 by Eurostat, the population of the EU on 1 January 2002 was expected to total 379.4 million. While the pace of population growth in the EU has slowed greatly in the last 30 years, the increase of 0.4 percent in 2001 was slightly higher than the figure in recent years. Total GDP in 2000 equalled US\$ 7,856.6 billion at current prices, while the average GDP per capita (at current exchange rates) amounted to US\$ 20,759 in 2000 (OECD, 2001).

The most important aspect of the process of unification (of the former EC countries), which affects trade, is the harmonisation of rules in the EU countries. As the unification allows free movement of capital, goods, services and people, the internal borders have been removed. Goods produced or imported into one member state can be moved around between the other member states without restrictions. A precondition for this free movement is uniformity in the rules and regulations concerning locally produced or imported products. Although the European Union is already a fact, the regulations have not yet all been harmonised. Work is in progress on uniform regulations in the fields of environmental pollution, health, safety, quality and education.

Since January 1, 2002, the Euro (€) is used as the legal currency within twelve EU member states: Austria, Belgium, Finland, France, Germany, Greece,

Italy, Ireland, Luxembourg, The Netherlands, Spain, and Portugal. Circulation of euro coins and banknotes started on 1 January 2002 and these replaced national currency notes and coins by 1 July 2002.

The most recent Eurostat trade statistics quoted in this survey are from the year 2000. In 1998 and 1999, the European Currency Unit (ECU) was still used as a monetary instrument by financial institutions to simplify financial procedures. On 1 January 1999, statistical and contractual values in ECU were converted into euros on a 1:1 exchange rate.

The Euro (€) / US\$ exchange rate currently (October 2002) stands at around US\$ 0.90 for one Euro. The US\$ is the basic currency unit used to indicate value in this market survey. The Eurostat trade statistics are based on the Euro (€) values and transferred into US\$ with the exchange rates indicated below.

Trade figures quoted in this survey must be interpreted and used with extreme caution. The collection of data regarding trade flows has become more difficult since the establishment of the single market on 1 January 1993. Until that date, trade was registered by means of compulsory Customs procedures at border crossings, but, since the removal of the intra-EU borders, this is no longer the case. Statistical bodies like Eurostat cannot now depend on the automatic generation of trade figures.

In the case of intra-EU trade, statistical reporting is only compulsory for exporting and importing firms whose trade exceeds a certain annual value. The threshold varies considerably from country to country, but it is typically about Euro (€) 100,000. As a consequence, although figures for trade between the EU and the rest of the world are accurately represented, trade within the EU is generally underestimated.

Exchange rates of EU currencies in US\$

Country	Currency	1997	1998	1999	2000	2001	October 2002
European Union	ECU	1.13	1.12	-	-	-	-
	€	-	-	1.06	0.92	0.91	0.99
Denmark	Dkr	0.15	0.15	0.13	0.12	0.12	0.13
Sweden	Skr	0.13	0.13	0.12	0.11	0.10	0.11
United Kingdom	GB£	1.64	1.66	1.62	1.51	1.47	1.57

Source: CBS Statline (October 2002)

This survey focuses on the five major EU markets for honey and beeswax. They are Germany, United Kingdom, France, Italy and The Netherlands. These EU member countries will be highlighted, because of their relative importance in terms of consumption, production, imports and exports. Germany, United Kingdom, France and Italy constitute the biggest consumer and industrial markets in the EU.

3 CONSUMPTION

3.1 Market size

3.1.1 Honey

Consumption in the EU is about 260,000 tonnes and was stable to increasing during 1998 – 2000. It is estimated that about 85 percent (221,000 tonnes) is sold in retail packaging directly to consumers.

15 percent (39,000 tonnes) is sold as ingredients to industrial users.

Per capita consumption of honey in the EU countries is an estimated average of 0.7 kg per annum. However, consumption varies widely amongst individual countries; from Greece with an estimated 0.3 kg per capita to Germany with an estimated 1.8 kg per capita. There are no detailed consumption figures available for the EU countries. Please contact local importers and processors, as they will have a better insight in consumption patterns in their countries.

3.1.2 Beeswax

In the past, beeswax had a wide range of uses, for example on ships and in varnishes, paints and polishes. Though in many cases beeswax can be replaced by cheaper, synthetic waxes, its very special characteristics, medicinal benefits, plasticity and aroma ensure its continuing use.

The trend for more natural products in cosmetics and food also increases its use. For this purpose also modified beeswax, with improved properties, is being produced.

Most nationally produced wax in EU countries (estimated at roughly 1,000 – 1,500 tonnes per annum) is used by beekeepers for foundation sheets in beehives. In The Netherlands, this is estimated at 6 tons.

Table 3.1 Annual per capita consumption of honey in EU countries compared to other countries

Country	Consumption in kilograms
Germany	1.8
Other EU countries	0.54 – 1.2
Switzerland	1.2
USSR	0.64
USA	0.55
Japan	0.34

Source: Wakhle 1998

Beeswax is used as an ingredient for a wide variety of consumer and industrial products. No official figures on the use of beeswax by the different industrial sectors exist.

It is further estimated that imported beeswax is mainly used as an ingredient by the industry in the following ratios:

- 30 percent for use in cosmetics
- 30 percent for use in pharmaceutical preparations and application in natural medicine (massage)
- 20 percent for candles
- 20 percent for other applications including the production of wax foundation sheets

Table 3.2 Application of honey for different product categories

Product category	Products	Characteristics
Food	Honey, raw and industrial	Delicacy, health food
Natural medicine	Honey, raw and industrial	Home remedy
Home remedy	Cough syrup	Therapeutic agent
Processed food	Lozenges, confectionery, bakery	Delicatesses
Traditional recipes	Nougat, Turkish delight, Baklava	
Food supplements	Royal jelly in honey Bee venom in honey Propolis in honey	Carrier of therapeutic ingredients
Alcoholic drinks	Mead, honey beer, liquors	Raw material or sweet additive
Cosmetics	Creams, hair shampoo, soap, bath salt	Improvement of appearance and skin-care effect
Pharmaceuticals	Ointments, wound dressing	Therapeutic agent
Industrial products	Powdered honey and jellied honey (dehydrated honey products)	Ingredient for cosmetics

Table 3.3 Application of beeswax for different product categories

Product category	Products	Characteristics
Candles	Candles (poured into moulds or dipped)	Solidity, slow burning, therapeutic effect
Wax foundation	Rolled and poured wax foundation sheets	Production increase of honey
Art	Wax figures and statues	Melting and moulding properties, solidity and resistance against melting
Sculptures	Metal castings, modelling, jewellery (lost wax casting)	Plasticity, mouldability, melting properties
Engraving	Glass and metal engraving	Protection against etching acid, resist technique
Processed food	Confectionery, bakery, packaging	Separation agent, preservation
Pharmaceuticals	Coating of jellied sweets and liquorice	Anti-sticking agent
Physiotherapy	Drugs, pills, capsules, salve and ointments	Consistency, binding agent, time release mechanism, carrier of drug
Natural therapy	Compresses	Warmth retaining capacity
Cosmetics	Ear plugs	Softness, impermeability
	Creams, lotions, lipstick, mascara, eye shadows, deodorants, hair creams, depilatories, hair conditioners (<i>face masks for military purposes</i>)	Emollient and emulsifier. Improvement of appearance, consistency and sensitivity to melting
Textiles	Batik	Waterproofing, paint resistant, resist technique
Handicrafts	Eco design	Plastering agent for artisans
Musical instruments	Flutes, didgeridoo, violins, drums	Softness of mouth parts and reduction of porosity
Varnishes and polishes	Paintings, art restoration, metal, wood and leather treatment	Protection, impermeability for air, humidity and pests
Industrial products	Anti-corrosion rust inhibitor, lubricants	Decrease viscosity, drawing agent, prevention of corrosion

3.2 Market segmentation

3.2.1 Honey

The market for honey can be segmented into:

- Consumption honey (conventional or organic)
- Ingredient in products
- Industrial honey
- Raw material for mead

There are no data available concerning the size of the segments in the EU or in the five targeted countries. Exporters should contact importers in the EU countries to obtain information in respect of the requirements of the importer in terms of quality, composition, packing and pricing.

Consumption honey

Honey for household consumption is by far the largest market in the EU. It is estimated that 85 percent of honey is sold directly to consumers. The consumed honey is for 90 percent imported from other countries. Consumption honey is sold to consumers in a wide assortment of packaging and varieties and under different brand names. The type of honey consumed,

the variety of products offered to consumers, retail prices and type of packaging differ considerably between the individual EU countries and even between regions in countries.

For a review of honey products in different packaging in selected EU countries, please refer to chapter 8 of this survey.

Ingredient in products

The medicinal use of honey as a home remedy is probably its oldest and most widely known use, both for internal and external use, for example as cough syrup. If not used straight, honey is mixed at home with other liquid products such as hot milk, teas or other infusions, wine and other alcoholic beverages. The pharmacopoeias of many countries describe a honey-based preparation that can be prepared by pharmacists, like honey rose water.

Industrial honey

The traditional use of honey in food preparations has been substituted during the last century by sugar and more recently by various sugar syrups derived from starches. However, as part of the increasing appreciation

of more natural ingredients in many countries, honey has been rediscovered as a valuable food ingredient. Honey is used as an ingredient in a wide variety of food products, like baked products, confectionery, breakfast cereals, candy bars, spreads and in the preparation of marmalades and jams.

Distilled alcoholic beverages incorporate honey as a flavouring agent after distillation, as for example Benedictine in France, Drambuie in Scotland, Irish Mist in Ireland, Grappa al Miele in Italy and Barenfang in Germany.

The use of honey in the industrial non-alcoholic beverage industry is relatively recent and is expanding. The reasons are a wider distribution of 'functional' drinks, like 'energy drinks'. Honey is also used in the manufacturing of sauces, the preparations of canned meat and honey-cured (cooked) hams.

Raw material for mead

Mead is a honey wine, made by fermentation of pure honey diluted with water, with the addition of some acidic ingredients and sometimes propolis and spices. Mead needs a long ripening time to produce a particular flavour. A special 'vintage' or old mead is ripened in wooden vessels. This used to be a very popular traditional drink in several EU countries and still is.

3.3 Market trends

The grocery industry in the EU is characterised by increasing competitive pressures and a concentration of buying power by the major multi-European retail

chains. On the demand side, consumers reveal increasingly sophisticated needs related to the nutritional content of products, time saving in preparation, product information and animal welfare. Food safety issues play a particularly strong role after the various food crises the EU has experienced during the last few years.

Tracing and tracking of ingredients for food products becomes an integral part of a closed food chain, where the products are registered and followed from farmer to table.

The use of genetically manipulated products is a hotly contested issue in the EU. Generally, consumers are not in favour of using products containing genetically manipulated ingredients. The EU is in the process of preparing directives for the application of GMOs.

Trends in honey consumption

Honey consumption increases in most countries, but data are scarce. In countries where honey was used mainly as a home remedy or in cough syrup, there is a trend in using it also as a health food. Although honey is regarded as a natural product, the ban of honey from China that contained antibiotics does not contribute to the positive image consumers have of honey.

Trends in beeswax consumption

The use of beeswax in natural medicine, cosmetics and food increases. The raw materials producers for the cosmetic industry tend to make modified beeswax products, with improved properties.

4 PRODUCTION

4.1 Honey

Honey production in the EU was 111,000 tonnes in 2001, a decrease of five percent compared to 1999. Global honey production was 1,173,000 tonnes in 1999; it increased by 30 percent from 1979 to 1989, subsequently stabilising from 1989 to 1999 with an increase of 3 percent.

The EU was the third largest producer in 1999 after China with 214,000 tonnes and the Community of Independent States with 134,000 tonnes. Other major producers are the United States (101,000 tonnes) and Argentina (85,000 tonnes).

Global trade involves about 25 percent of global honey production.

Honey production in the EU is insufficient to cover demand, so that about half of the honey consumed has to be imported from non-EU countries.

In The Netherlands only 10 percent of the consumption is produced locally and 90 percent is imported.

The rate of self-sufficiency fell below 50 percent for the first time in 1998/1999 and now stands at 47.4 percent. Spain, France and Germany are the EU's three major honey producers with 32,000 tonnes, 18,000 tonnes and 18,000 tonnes of honey respectively in 2001.

Together they accounted for 62 percent of total EU production. Honey production in the EU has been fairly stable as from 1997.

Other EU countries produced the following quantities in 2001:

United Kingdom 2.9 tonnes, Belgium/Luxembourg 1.4 tonnes, Sweden 1.4 tonnes, Finland 1 ton and Ireland 0.2 tonnes.

The total number of beekeepers increased from 435,000 in 1992 to 460,000 in 1999. The number of professional beekeepers in 1999 was estimated at 14,350.

They are concentrated in Spain (32%), France (21%) and Greece (21%).

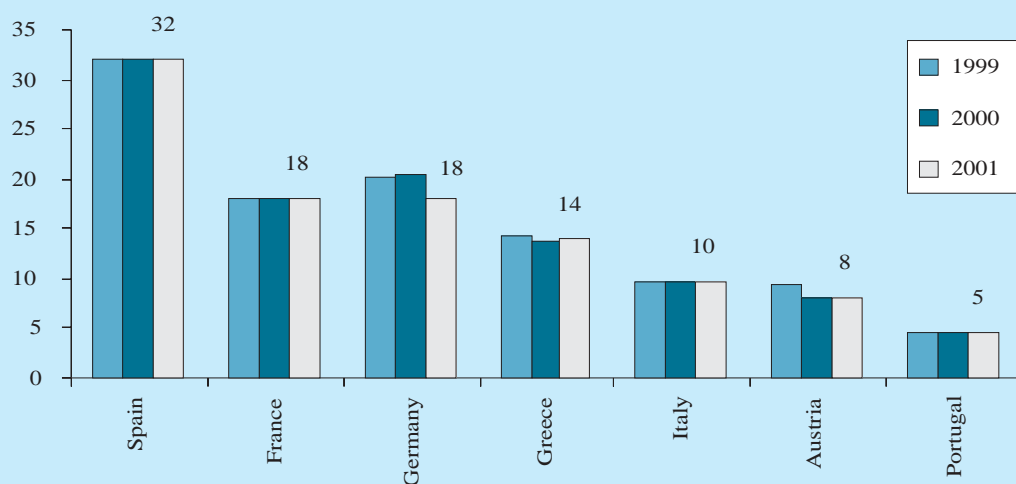
During the period 1992 – 1999 the number of hives increased by 11 percent to 8,653,000.

Professionals operate more than three million hives, or 42.4 percent of all European hives. Spain has the highest ratio of professional beekeepers to the total number of beekeepers with 16.4 percent, followed by Greece with 12.5 percent and Portugal with 6.9 percent. These three countries account for 73 percent of professionally operated hives in the EU.

The other countries with a large number of hives show lower rates of professional operation.

Spain has the largest number of hives with over two million, followed by France with almost one and a half million.

Figure 4.1 Leading EU producers of honey, 1999-2001, 1.000 tonnes



Source: FAO 2002

Production costs

Production costs (fixed and variable) in the EU can be classified into three categories:

- high cost: € 112 to 142 per hive in Germany, Sweden, Finland, United Kingdom and The Netherlands
- medium cost: € 56 to 91 per hive in Austria, Denmark, Belgium, Luxembourg and Portugal
- low cost: € 20 to 41 per hive in Spain, France, Italy and Greece.

EU support to beekeepers

Beekeepers in the EU are confronted with rising production costs, cheaper imports from non-EU countries and diseases of bee populations. This results in lower output and increased dependence on imports. In order to support the EU beekeepers, the EU commission has drawn up national programmes pursuant to Regulation EC No1221/97 to improve the quality of honey for periods of four years.

Funds made available to EU member countries are utilized in the following ways:

- control of bee diseases, organical methods for disease control
- technical assistance
- applied research projects
- analyses of honey to help beekeepers to upgrade their honey prior to marketing

4.2 Beeswax

There are no official figures regarding the production of beeswax in the EU, but production is estimated between 1,000 – 1,500 tonnes per annum. In The Netherlands the total beeswax production is estimated at 6 tonnes. This equals the quantity of wax foundation used by beekeepers.

Germany, Spain, Italy, France and Greece are the main beeswax producing countries in the EU.

5 IMPORTS

As already mentioned in chapter 2 of this survey, the import figures are based on Eurostat data. Other sources can give different figures. Therefore, the statistics should be read with caution. They should not be interpreted as absolute data, but more as trends in the different markets. Own research remains therefore an integral part in studying the EU market for honey and beeswax.

The chapters Imports and Exports will cover the following product groups:

0409 00 00: natural honey
 1521 90 91: raw beeswax and other insect waxes
 1521 90 99: beeswax and other insect waxes

Although in the Eurostat data 'raw beeswax' is mentioned, the common term in the trade is 'crude beeswax'. Therefore this term will be used in the remaining part of this survey.

5.1 Total imports

5.1.1 Natural honey

Between 1998 and 2000, imports of natural honey by EU member countries remained stable at 192,642 tons to 192,791 tonnes. However, in terms of value, imports decreased by 24 percent during the period 1998 – 2000: from US\$ 300 million in 1998 to US\$ 228 million in 2000.

One reason is probably a shift to polyfloral honey at the cost of monofloral honey like robinia, which is becoming scarce. Another likely reason is that more cheap honey

from East Europe was imported following the collapse of communism in 1990. Production in these countries has increased, due to land use liberation, opportunities for commercial activities and the possibility of exports. There is a shift in imports from Italy, Spain and Portugal in favour of East European countries like Poland, Hungary, Romania, Bulgaria and Ukraine. The prices were at first very low, but increased during 2001. Another reason is the addition of India as a honey exporting country mainly to Germany. The honey production from beekeeping in Nepal, China and Vietnam increased enormously as well, after the introduction of *Apis mellifera*, a type of bee used in EU countries.

Low quality honeys from India and China are either mixed with better honeys (with low HMF) or made in Germany or Austria into honey jelly and honey powder (dried honey products) for the cosmetic industry. So, a shift to industrial products is also a possible explanation. Honey cosmetics are produced in Austria and Italy.

Competition has intensified between EU produced honey and imported honey. Certain types of honey, easy to blend and imported at low prices, affect the price of EU output, especially that of mixed-flower (polyflora) honey.

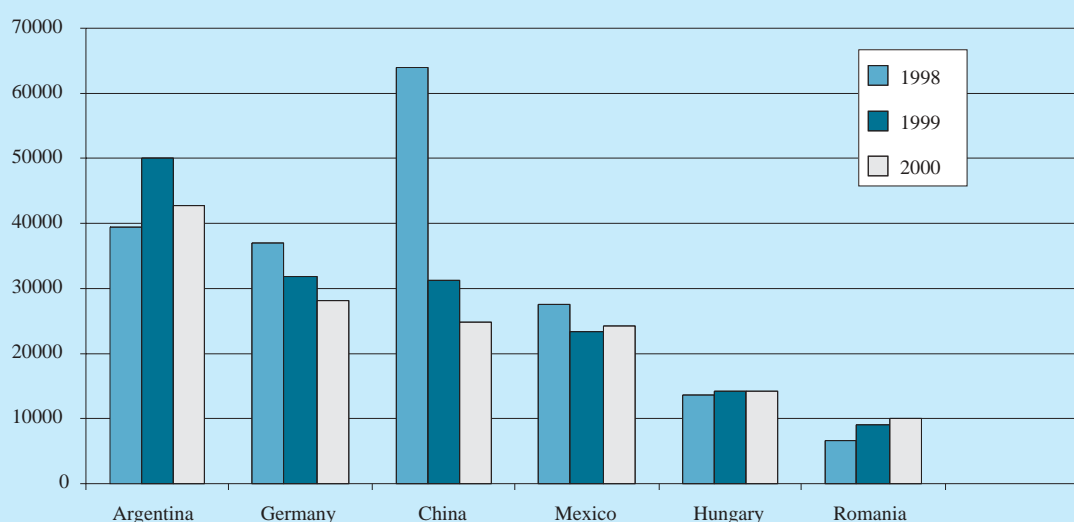
Germany is the leading importer, accounting for 48 percent of total year 2000 imports (in volume) by EU member countries, followed by United Kingdom (12%), France (8%) and Italy (6%). These four countries accounted for 74 percent of total EU imports.

Table 5.1 Imports of natural honey into the EU, 1998-2000
 US\$ 1,000/ € 1,000/ tonnes

	1998		value US\$	1999		value US\$	2000	
	value US\$	volume		value €	volume		value €	volume
Total	299,495	192,642	256,833	242,295	192,790	227,762	247,567	193,791
Extra-EU	213,220	152,402	178,577	168,469	151,327	161,894	175,972	154,728
Developing countries	168,877	127,945	133,867	126,290	121,873	117,373	127,579	118,399
<i>Major importing countries</i>								
Germany	139,190	94,802	114,579	108,093	90,961	103,408	112,400	93,982
United Kingdom	35,716	24,715	26,462	24,964	22,903	23,554	25,602	22,563
France	24,354	12,503	25,548	24,102	15,320	21,552	23,426	15,666
Italy	19,479	12,155	16,611	15,671	12,481	14,955	16,255	12,487
Belgium & Luxembourg	14,271	9,142	13,907	13,120	9,660	14,334	15,580	10,165

Source : Eurostat 2000

Figure 5.1 Leading suppliers of natural honey to the EU, 1998 – 2000, US\$ 1,000



Source: Eurostat 2000

Of the leading importers, only France saw its imports increase between 1998 and 2000.

Imports from developing countries amounted to 61 percent of the total volume imported in 2000. Argentina, China and Mexico are the largest suppliers outside the EU in terms of volume.

These three countries accounted for 50 percent of total volume imports into the EU.

It should be noted that Germany has a leading position in the EU and in the global trade of honey and beeswax. Therefore supplies from Germany may not always originate in this country, but are sourced and imported from developing countries and re-exported to other EU countries.

5.1.2 Crude beeswax and other insect waxes

Imports of crude beeswax and other insect waxes into the EU decreased both in volume and value in 2000 compared to 1998.

Germany remained the largest importer in the EU with 65 percent of the total imported volume, followed by France with 15 percent and Italy with 8 percent. These three countries represented 88 percent of total EU imports in 2000.

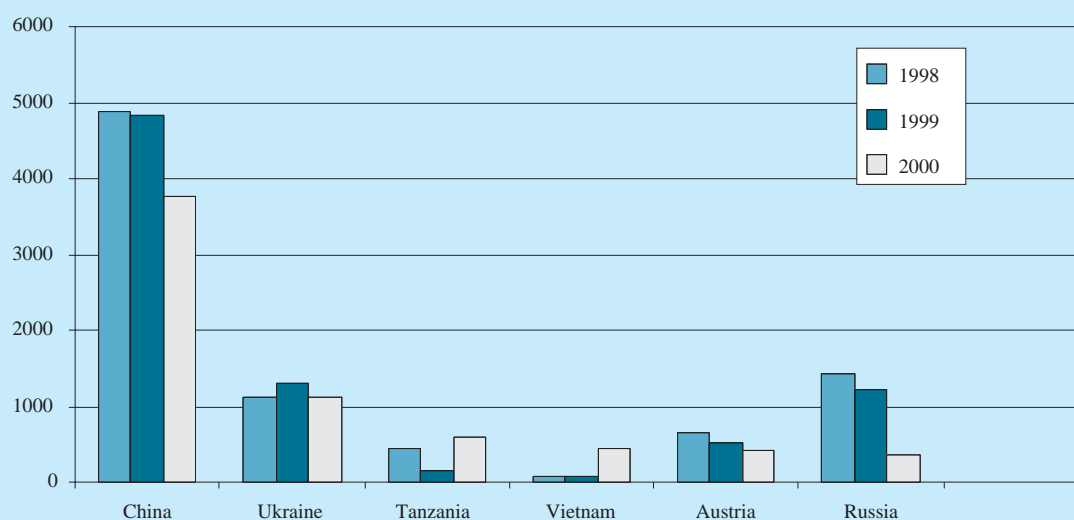
Developing countries supplied 66 percent of the total volume imported into the EU. China, Ukraine, Tanzania and Vietnam were the largest suppliers of crude beeswax and other insect waxes to the EU. These four countries accounted for 61 percent of total EU imports.

Table 5.2 Imports of crude beeswax and other insect waxes into the EU, 1998 – 2000, US\$ 1,000/ € 1,000/ tonnes

	1998		1999			2000		
	value US\$	volume	value US\$	value €	volume	value US\$	value €	volume
Total	13,607	3,624	11,326	10,685	3,830	9,961	10,827	3,516
Extra-EU	12,380	3,361	10,193	9,616	3,408	9,249	10,053	3,319
Developing countries	6,664	1,826	6,236	5,883	2,084	6,458	7,020	2,336
<i>Major importing countries</i>								
Germany	8,605	2,375	6,566	6,194	2,346	6,110	6,641	2,269
France	2,059	542	1,649	1,556	476	1,493	1,623	541
Italy	769	205	988	932	336	844	917	264
United Kingdom	991	243	1,041	982	335	660	717	178

Source : Eurostat 2000

Figure 5.2 Leading suppliers of crude beeswax and other insect waxes to the EU, 1998 – 2000, US\$ 1,000



Source: Eurostat 2000

5.1.3 Beeswax and other insect waxes

Imports of beeswax and other insect waxes increased by 37 percent in volume between 1998 and 2000.

However, the import value increased by only 11 percent during the same period. France was the largest importing country with 19 percent in value, followed by United Kingdom with 15 percent, Greece with 14 percent, Italy with 13 percent and Spain with 13 percent.

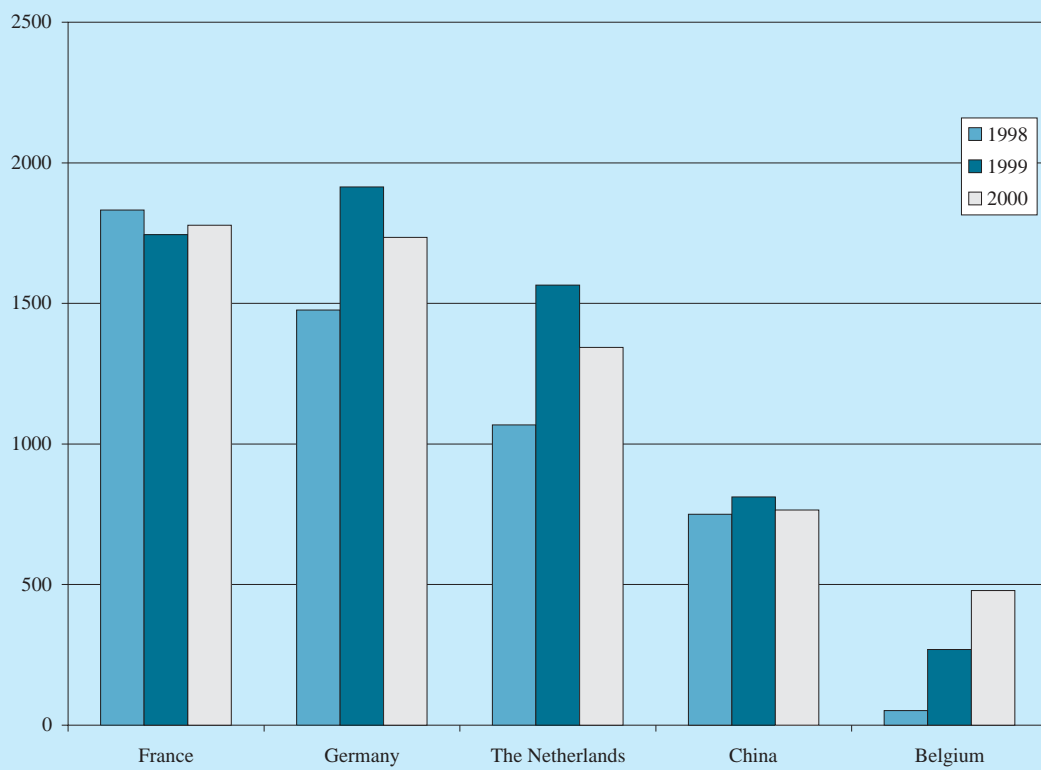
Developing countries supplied 26 percent of the total volume imported into the EU in 2000.

Table 5.3 Imports of beeswax and other insect waxes into the EU, 1998 – 2000, US\$ 1,000/ € 1,000/ tonnes

	1998		1999			2000		
	value US\$	volume	value US\$	value €	volume	value US\$	value €	volume
Total	7,022	1,617	7,826	7,383	1,776	7,767	8,442	2,209
Extra-EU	1,323	339	1,556	1,468	420	1,317	1,431	660
Developing countries	978	265	1,098	1,036	324	997	1,084	570
Major importing countries								
France	788	173	1,100	1,038	309	1,456	1,583	368
United Kingdom	972	401	1,211	1,142	265	1,165	1,266	232
Greece	862	296	1,407	1,327	478	1,102	1,198	661
Italy	1,165	161	1,215	1,146	116	1,023	1,112	147
Spain	756	150	538	508	88	1,020	1,109	304

Source : Eurostat 2000

Figure 5.3 Leading suppliers of beeswax and other insect waxes to the EU, 1998 – 2000, US\$ million



Source: Eurostat 2000

Germany

Germany was the largest importer of honey and beeswax in terms of value in 2000. The import value amounted to US\$ 110 million, accounting for 45 percent of total EU imports.

Product	Import value in US \$ million	Import share in %
Natural honey	103	94
Crude beeswax	6	5
Beeswax	0.7	1

The import market in 2000 showed a decrease in value of 11 percent compared to 1999, but an increase in volume of 3.5 percent (412,000 tonnes)

However, the volume in 2000 was still 2.6 percent lower compared to 1998, when 423,000 tonnes were imported.

Argentina was the largest supplier of honey to Germany during the period under review. Although China supplied the largest quantity in 1998, imports decreased sharply during the next two years. The likely reasons are the high stock levels built up during 1998. Argentina, Mexico and China remain the largest suppliers to the German market.

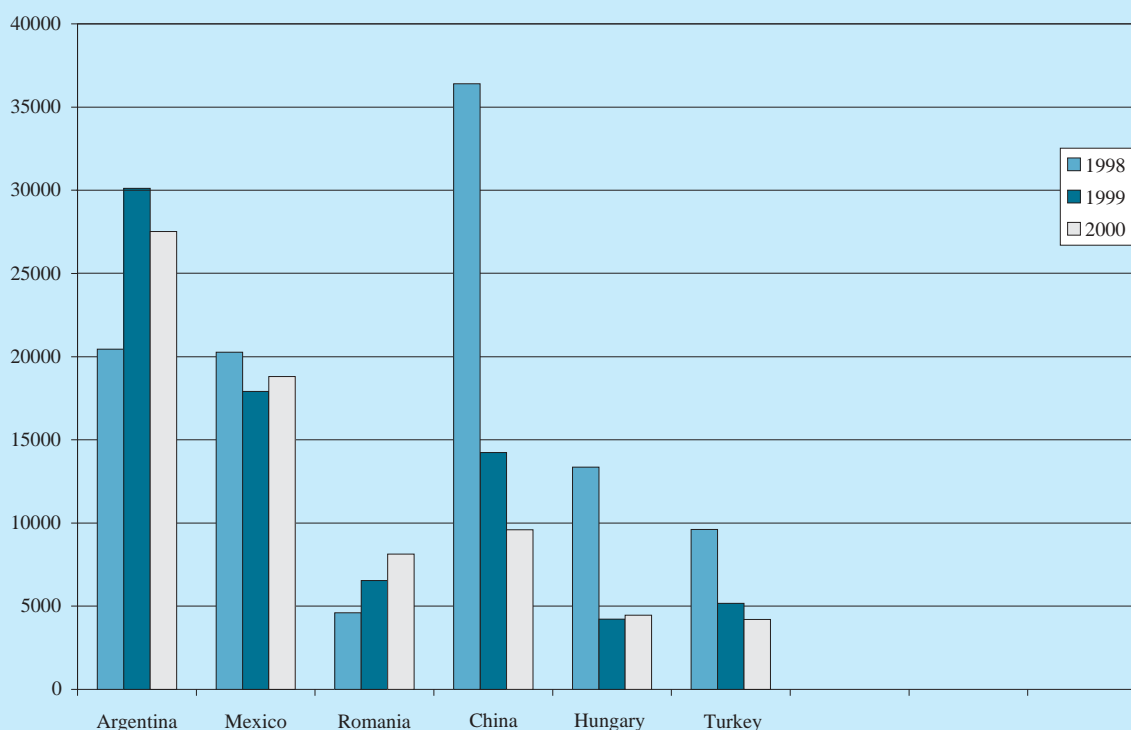
Together they accounted for more than 50 percent in value of total imports.

The imports arrive in large containers of which the contents are processed further in Germany for domestic sales or re-export to other EU countries.

The leading suppliers of honey and beeswax to Germany (share of total 2000 imports in terms of value)

→ Argentina (25%), Mexico (17%), China (9%), Romania (7%), Hungary (4%), Turkey (4%)

Figure 5.4 Leading suppliers of honey and beeswax to Germany, 1998 – 2000, US\$ million



Source: Eurostat 2000

United Kingdom

In terms of value, the United Kingdom was the second largest importer of honey and beeswax in 2000.

The import value amounted to US\$ 25.4 million, accounting for 10 percent of total EU imports.

Product	Import value in US \$ million	Import share in %
Natural honey	24	93
Crude beeswax	0.4	3
Beeswax	1	4

The imported volume of honey into the United Kingdom declined from 24,715 tonnes in 1998 to 22,563 tonnes in 2000, a decline of 9 percent.

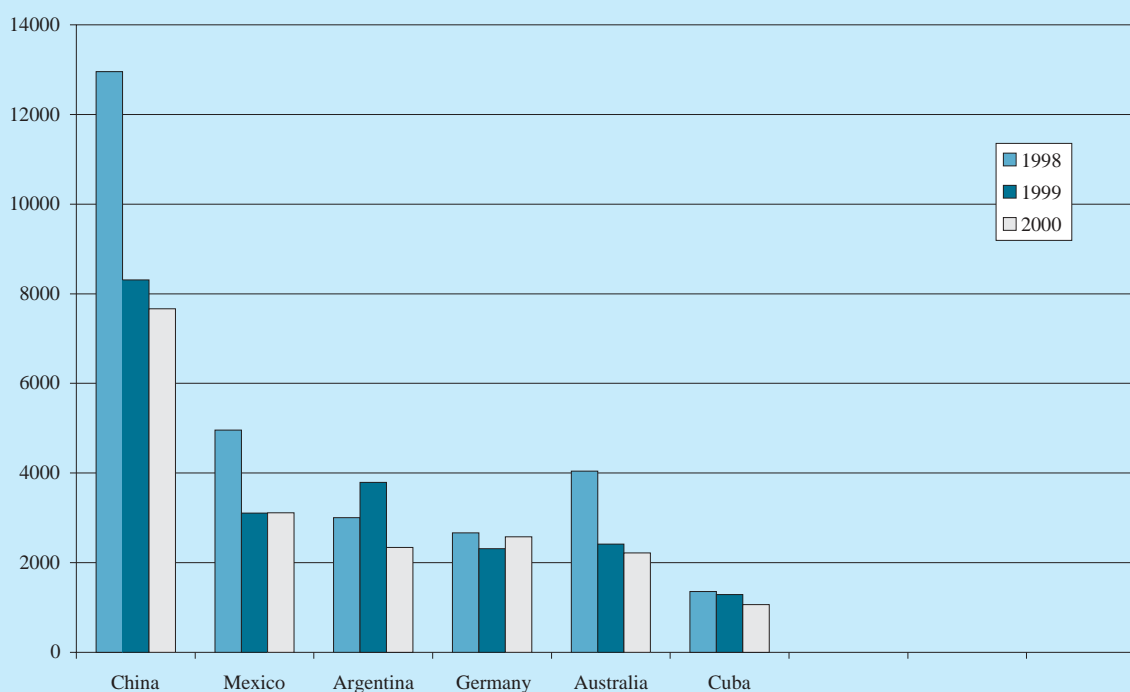
The import value declined even further: from US\$ 35,7 million in 1998 to US\$ 23,6 million in 2000, a decline of 34 percent.

Large supplies from China in 1998 led to overstocking and a subsequent decrease in imports and price levels during 1999. As in Germany, China, Mexico and Argentina accounted for more than 50 percent of total imports in value during the period under review. Germany, the world's largest importer of honey, supplied mainly processed honey to the UK market.

The leading suppliers of honey and beeswax to United Kingdom (share of total 2000 imports in terms of value)

→ China (30%), Mexico (12%), Germany (10%), Argentina (9%), Australia (9%), Cuba (4%)

Figure 5.5 Leading suppliers of honey and beeswax to United Kingdom, 1998 – 2000, US\$ million



Source: Eurostat 2000

France

As the third country in the EU in terms of value, France imported natural honey and beeswax for US\$ 24.5 million in 2000, which was an import share of 10 percent of total EU imports.

Product	Import value in US \$ million	Import share in %
Natural honey	21.5	88
Crude beeswax	1.5	6
Beeswax	1.5	6

During the period 1998 –2000, imports into France increased consistently in volume, from 13,218 tonnes to 16,575 tonnes. However, in terms of value, imports decreased from US\$ 27.2 million in 1998 to US\$ 24.5 million, a decrease of 10 percent.

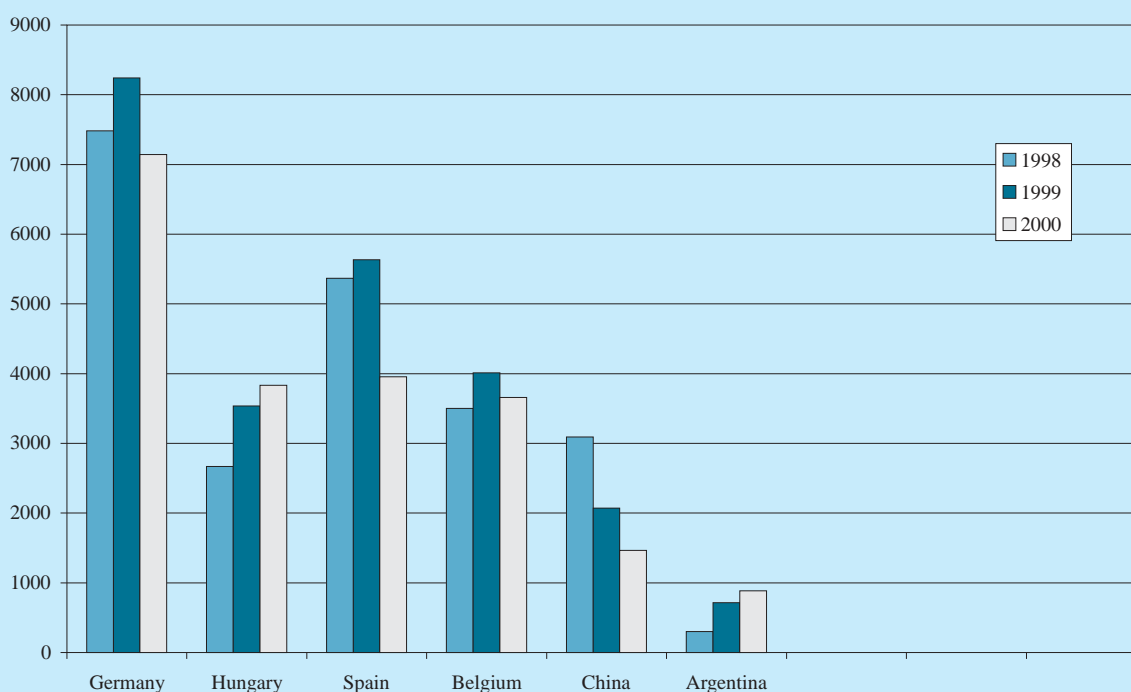
Germany remained the largest supplier of honey and beeswax to France during the period under review, followed by Spain and Belgium.

However, the imports from Hungary and Argentina increased constantly during the period under review. Poor weather conditions and bee diseases might have caused the declining imports from China.

The leading suppliers of honey and beeswax to France (share of total 2000 imports in terms of value)

→ Germany (29%), Hungary (16%), Spain (16%), Belgium (15%), Argentina (3%)

Figure 5.6 Imports of honey and beeswax into France, 1998 – 2000, US\$ million



Source: Eurostat 2000

Italy

In terms of value, Italy was the fourth largest importer of honey and beeswax in 2000.

The import value amounted to US\$ 16.8 million, accounting for 7 percent of total EU imports.

Product	Import value in US \$ million	Import share in %
Natural honey	15	90
Crude beeswax	0.8	5
Beeswax	1.0	5

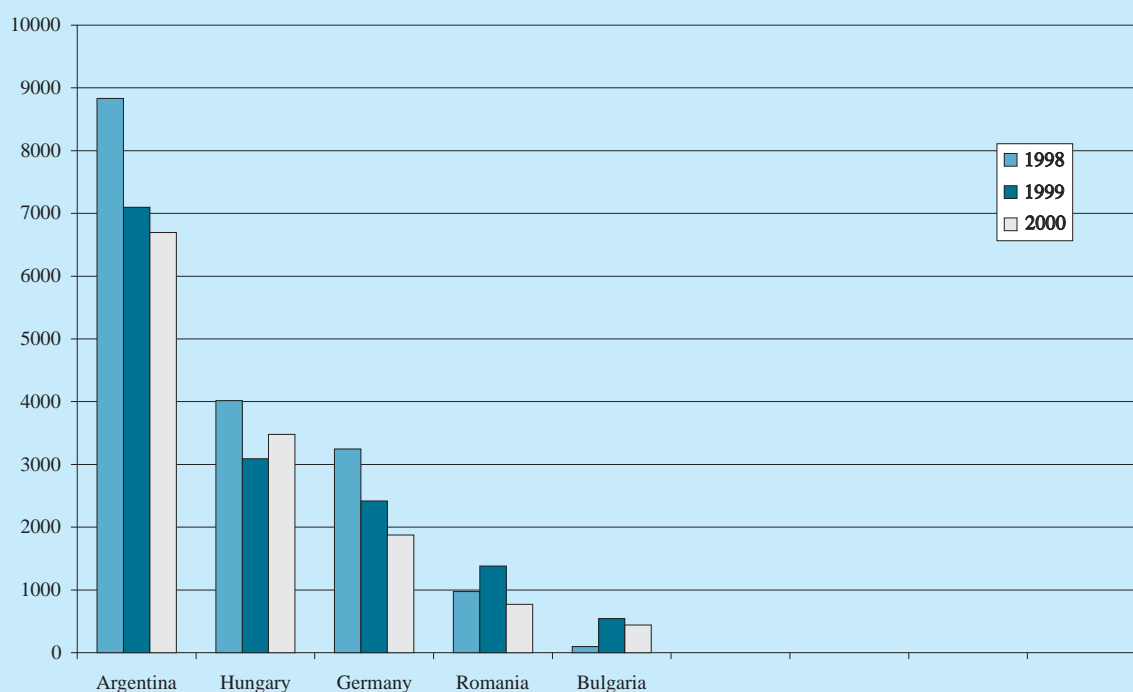
Imported volume remained stable at 12,490 tonnes during 1998 – 2000, however, in terms of value imports decreased from US\$ 19,5 million in 1998 to US\$ 15 million in 2000, a decrease of 23 percent.

Argentina remained by far the largest supplier to Italy, although imports in value decreased constantly during the period under review. This is in line with the lower price levels of imports into the EU during the period under review.

The leading suppliers of honey and beeswax to Italy (share of total 2000 imports in terms of value)

→ Argentina (40%), Hungary (21%), Germany (11%), Romania (5%), Bulgaria (3%)

Figure 5.7 Imports of honey and beeswax into Italy, 1998 – 2000, US\$ million



Source: Eurostat 2000

The Netherlands

The Netherlands was the seventh largest importer of honey in 2000. No imports of beeswax and other insect waxes were recorded during 1998 – 2000.

The import value amounted to US\$ 11.9 million in 2000, accounting for 5 percent of total EU imports.

Product	Import value in US \$ million	Import share in %
Natural honey	11.9	100

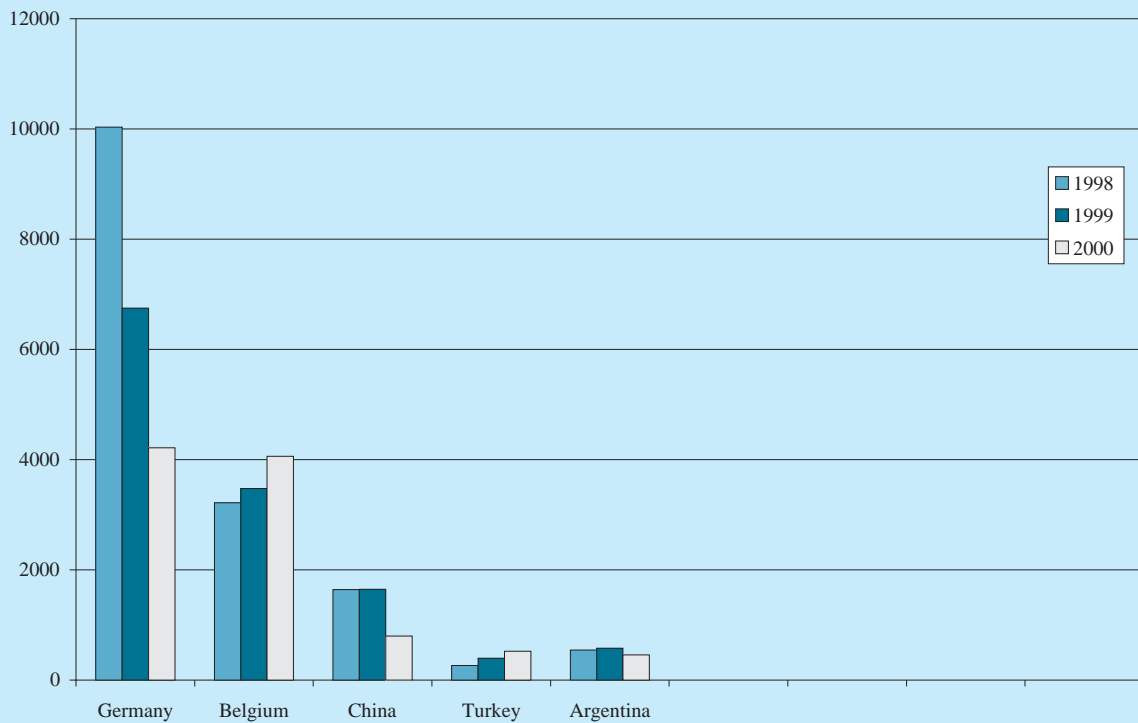
After an increase in imported volume in 1999, imports fell to 7,303 tonnes in 2000, which was even below the volume imported in 1998 of 7,857 tonnes. In terms of value, imports decreased by 23 percent in 2000 compared to 1998.

German imports of honey into The Netherlands declined substantially during the period under review. A clear shift to imports from Belgium is recorded, leading to an almost equal supply with Germany. Imports from non-EU countries remained small.

The leading suppliers of natural honey to The Netherlands (share of total 2000 imports in terms of value)

→ Germany (35%), Belgium (34%), China (7%), Turkey (4%)

Figure 5.8 Imports of natural honey into The Netherlands, 1998 – 2000, US\$ million



Source: Eurostat 2000

5.2 Imports by product group

Table 5.4 Imports of honey and beeswax per product group into the EU, 1998 - 2000
US\$ 1,000/ € 1,000/ tonnes

	1998		value US\$	1999		value US\$	2000	
	value US\$	volume		value €	volume		value €	volume
Natural honey								
Total	299,495	192,642	256,833	242,295	192,790	227,762	247,567	193,791
Extra-EU	213,220	152,402	178,577	168,469	151,327	161,894	175,972	154,728
Developing countries	168,877	127,945	133,867	126,290	121,873	117,373	127,579	118,399
Crude beeswax + other insect waxes								
Total	13,607	3,624	11,326	10,685	3,830	9,961	10,827	3,516
Extra-EU	12,380	3,361	10,193	9,616	3,408	9,249	10,053	3,319
Developing countries	6,664	1,826	6,236	5,883	2,084	6,458	7,020	2,336
Beeswax + other insect waxes								
Total	7,022	1,617	7,826	7,383	1,776	7,767	8,442	2,209
Extra-EU	1,323	339	1,556	1,468	420	1,317	1,431	660
Developing countries	978	265	1,098	1,036	324	997	1,084	570

Source: Eurostat 2000

5.2.1 Natural honey

Natural honey is the largest bee product imported into the EU, both in value and in volume (93 percent in value and 97 percent in volume in 2000).

The import share of honey from developing countries showed the following figures:

	1998	1999	2000
Import share in value	56%	52%	52%
Import share in volume	66%	63%	61%

As the world's largest importer of honey, Germany remained the most important trading partner for exporters in developing countries, followed at a distance by the UK and France.

Increase in production and exports by leading exporting countries resulted in lower prices during 1999 and 2000. Favourable weather conditions, improved pest control and modernization of the industry were to a large extent responsible for increased exports to the EU.

The leading suppliers of natural honey to the EU from developing countries (share of total 2000 imports in terms of value)

→ Argentina (19%), China (11%), Mexico (11%), Cuba (2%), Turkey (2%)

5.2.2 Crude beeswax and other insect waxes

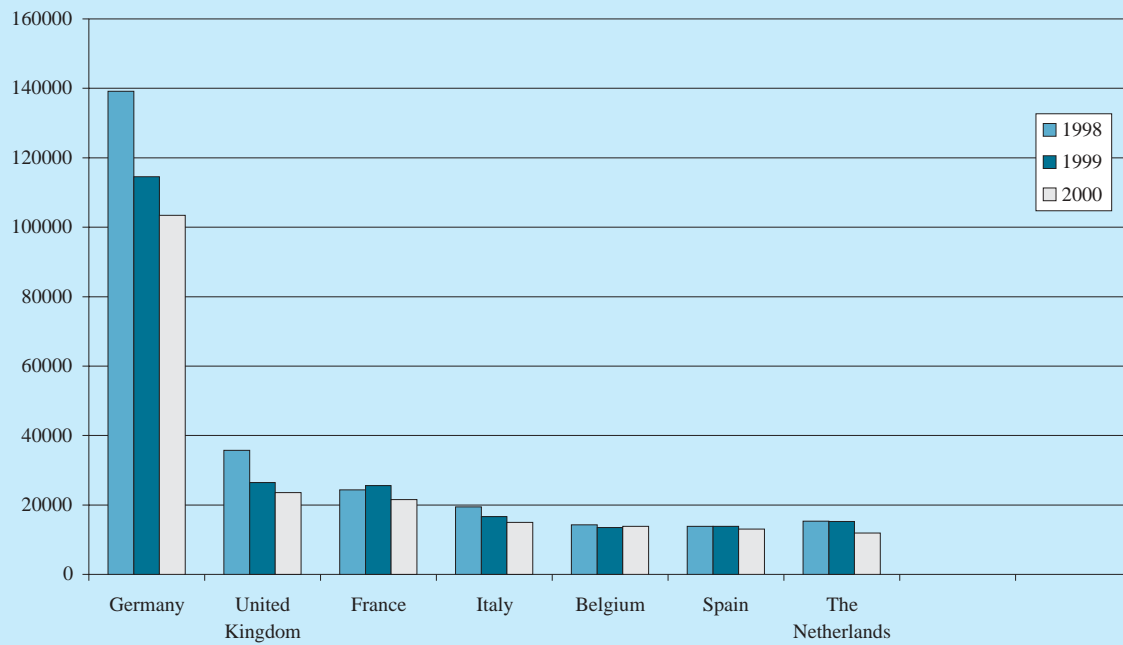
Crude beeswax and other insect waxes constitute only a small part of total honey and beeswax imports into the EU. In 2000, a volume of 3,516 tonnes was imported, representing a value of US\$ 10 million.

The import share of developing countries shows the following:

	1998	1999	2000
Import share in value	49%	55%	65%
Import share in volume	50%	54%	66%

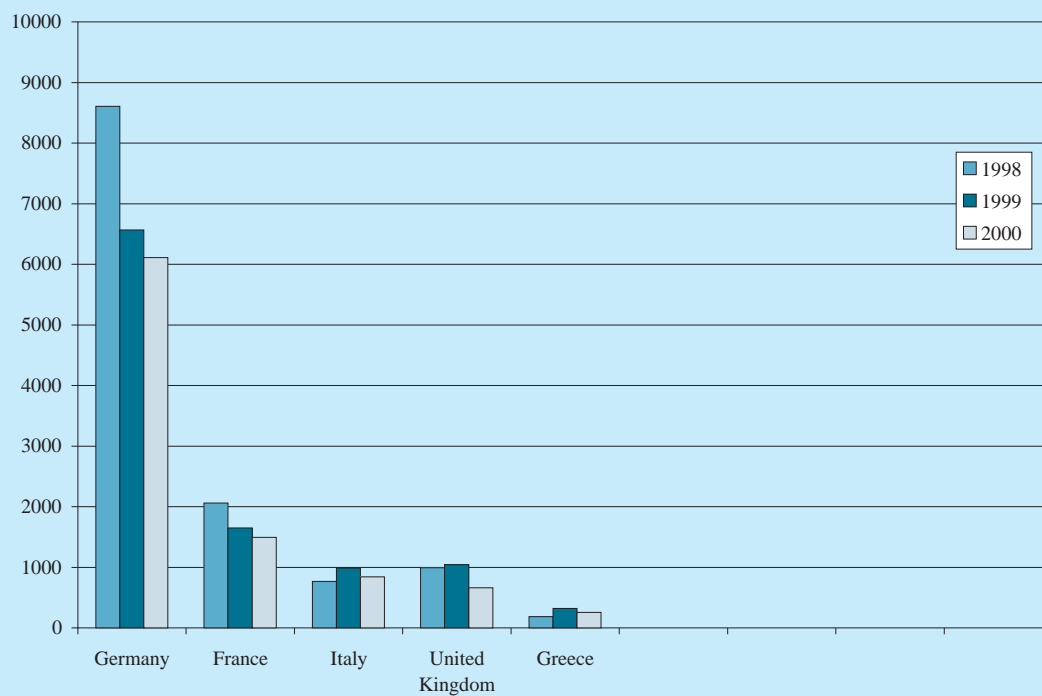
Although small in volume and value, imports from developing countries accounted for a growing part of EU imports. The EU is therefore an interesting market for exporters in developing countries to develop.

Figure 5.9 Imports of natural honey into the main EU countries, US\$ thousand, 1998 –2000



Source: Eurostat 2000

Figure 5.10 Imports of crude beeswax and other insect waxes into the main EU countries, US\$ thousand, 1998 – 2000



Source: Eurostat 2000

The leading suppliers of raw beeswax and other insect waxes to the EU from developing countries (share of total 2000 imports in terms of value)

→ China (38%), Tanzania (16%), Vietnam (4%), Ethiopia (4%)

Germany remained by far the largest importer of crude beeswax during the period under review, followed by France. In line with declining prices for honey, prices for crude beeswax also declined during 1999 and 2000.

5.2.3 Beeswax and other insect waxes

The smallest product group of honey and beeswax imported into the EU. The imported volume in 2000 was 2,209 tonnes, representing a value of US\$ 7.8 million. The import volume increased from 1,617 tonnes in 1998 to 2,209 tonnes in 2000, an increase of 37 percent. The value of imports increased by only 11 percent during the same period to US\$ 7.8 million.

Although the import share of developing countries is small and quite stable in terms of value, the share in volume increased constantly to 26 percent in 2000. Contrary to the imports of honey and crude beeswax, France is the largest importing country in the EU for beeswax and other insect waxes. Although a small market, volumes increased by 37 percent during 1998 – 2000. Beeswax is a trading product and can be stored for a long time. Therefore price variations are less dependent on production, but more dependent on supply and demand situations.

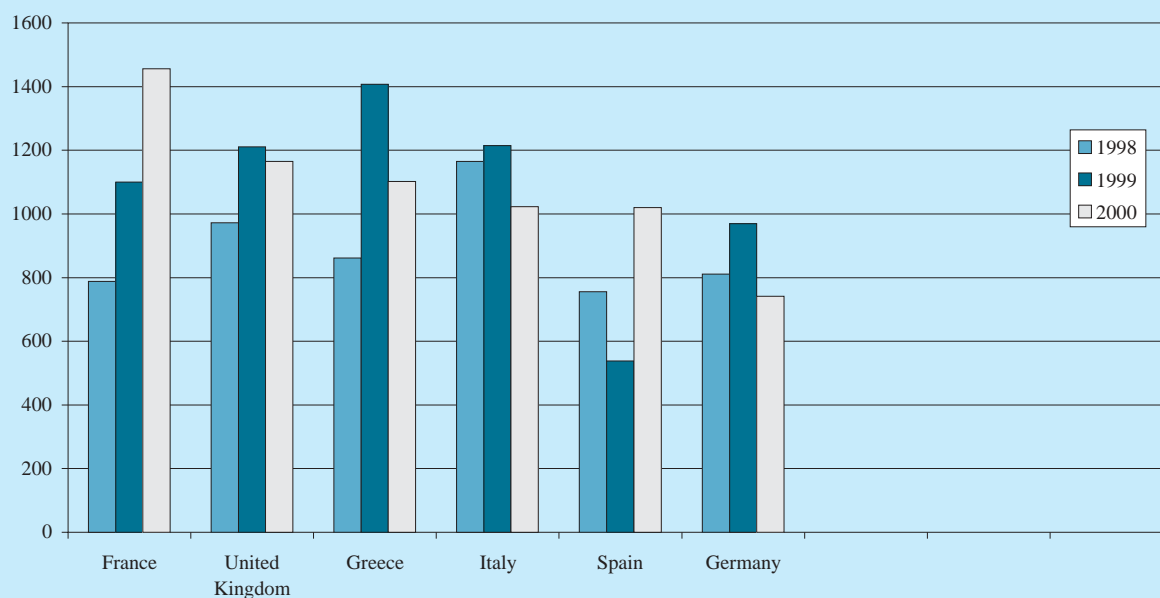
The relatively modest position of Germany as an importing country is remarkable in view of its dominance as an importer of honey and crude beeswax.

The leading suppliers of beeswax and other insect waxes to the EU from developing countries (share of total 2000 imports in terms of value)

→ China (10%), Guinea (1%)

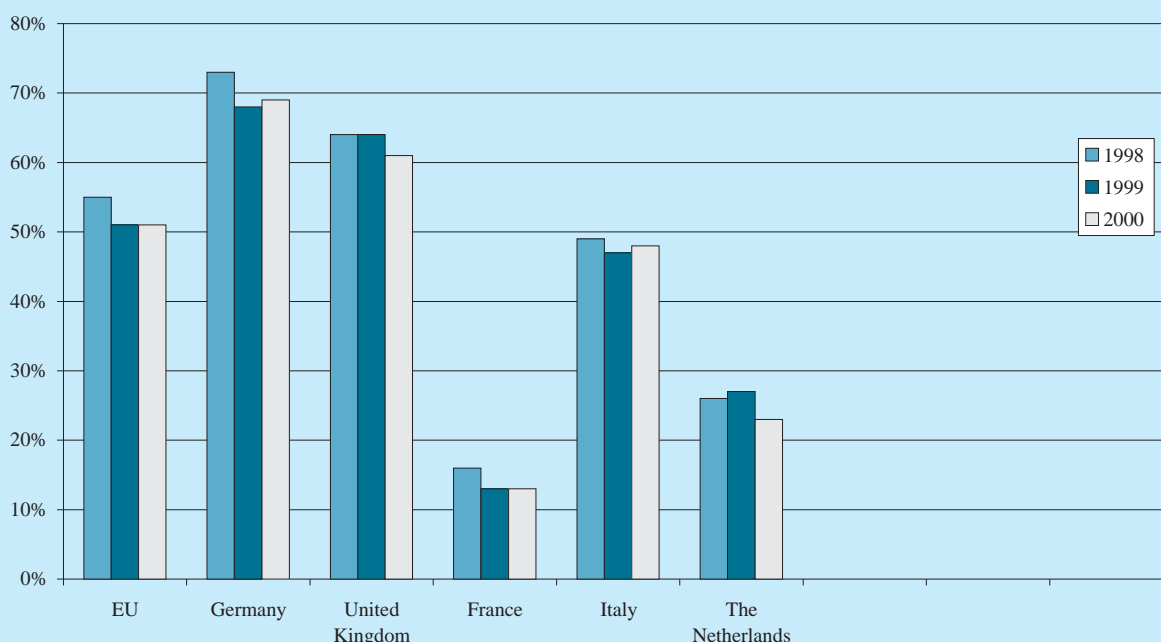
	1998	1999	2000
Market share in value	14%	14%	3%
Market share in volume	16%	18%	26%

Figure 5.11 Imports of beeswax and other insect waxes into the main EU countries, US\$ thousand, 1998 – 2000



Source: Eurostat 2000

Figure 5.12 Share of developing countries in imports of honey and beeswax into selected EU countries, 1998-2000, % of imported value



Source: Eurostat 2000

5.3 The role of the developing countries

Between 1998 and 2000, imports of honey and beeswax from developing countries decreased on a value basis from US\$ 176 million in 1998 to US\$ 135 million in 2000.

Volume decreased from 130,036 tonnes in 1998 to 121,305 tonnes in 2000, a decrease of 7 percent. The import share of developing countries in total EU imports decreased as follows:

	1998	1999	2000
Import share in value	55%	51%	51%
Import share in volume	66%	63%	61%

Germany remained the leading importer of honey and beeswax from developing countries, followed by the United Kingdom and Italy.

Slightly more than 50 percent of imported value originated in developing countries. The percentages of imported value of Germany and the United Kingdom in 2000 were, at 69 and 61 percent respectively, above the EU average.

Argentina, China and Mexico are the leading developing countries which supply the EU, followed by Cuba, Turkey, Tanzania, Vietnam, Ethiopia, Guinea, Ivory Coast and Cameroon.

Raw beeswax and other insect waxes is the most important product group supplied by developing countries to the EU. 65 percent of all imports originated in developing countries.

In terms of volume, honey remained the most important product group exported by developing countries.

Product groups	Main developing country suppliers (share in % of imported value supplied by developing countries, 2000)	Share DCs of total imported value, 2000
Natural honey	→ Argentina (34%), China (21%), Mexico (21%), Cuba (5%), Turkey (5%)	52%
Raw beeswax and other insect waxes	→ China (58%), Tanzania (9%), Vietnam (7%), Ethiopia (6%)	65%
Beeswax and other insect waxes	→ China (77%), Guinea (9%), Ivory Coast (5%), Cameroon (5%)	13%

Source: Eurostat, 2000

DCs = Developing countries

6 EXPORTS

6.1 Honey

Exports of honey from EU countries mainly take place to other EU countries. In 2000, the value of exports from EU countries was US\$ 89 million, of which US\$ 16 million was exported to non-EU countries. Germany was the largest exporting country and with US\$ 35 million in 2000 was responsible for 39 percent of total EU exports. Spain was the second largest exporter of honey with US\$ 16 million (18%).

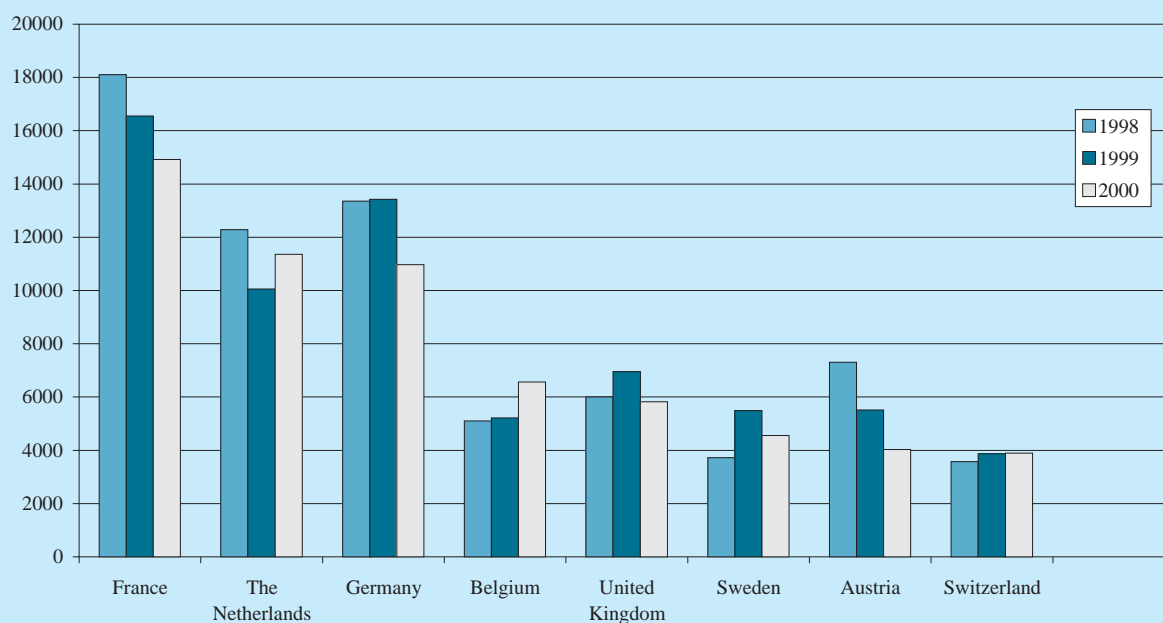
Although export volume increased constantly from 43,975 tonnes in 1998 to 48,472 in 2000, export value decreased from US\$ 102 million in 1998 to US\$ 89 million in 2000.

Table 6.1 Exports of natural honey from EU countries, 1998-2000
US\$ 1,000 / € 1,000 / tonnes

	1998		value US\$	1999		value US\$	2000	
	value US\$	volume		value €	volume		value €	volume
Total	101,689	43,975	97,434	91,919	46,196	89,054	96,798	48,472
Germany	44,877	20,188	42,649	40,235	21,723	34,684	37,700	20,839
Spain	20,946	9,857	14,224	13,419	7,022	15,547	16,899	8,304
Belgium & Luxembourg	6,483	3,095	7,382	6,964	4,132	9,717	10,561	5,587
France	9,453	3,108	9,356	8,826	3,306	8,275	8,995	2,942
Italy	6,524	2,360	8,274	7,806	3,711	6,512	7,078	3,295
Denmark	4,437	1,794	5,947	5,610	2,686	4,772	5,187	2,676
The Netherlands	1,991	950	2,297	2,167	1,130	2,665	2,897	1,547
United Kingdom	2,495	1,123	2,240	2,113	934	2,067	2,247	1,279
Austria	1,306	341	2,220	2,094	557	1,748	1,900	631
Portugal	1,178	646	575	542	352	1,191	1,295	647
Greece	1,303	292	1,865	1,759	518	1,098	1,194	475
Ireland	582	186	374	353	113	715	777	217
Sweden	83	27	19	18	7	44	48	23
Finland	31	8	12	11	5	17	19	10

Source: Eurostat 2000

Figure 6.1 Leading destinations for exports of natural honey from EU countries, US\$ thousand, 1998 - 2000



Source: Eurostat 2000

6.2 Crude beeswax and other insect waxes

Exports of crude beeswax and other insect waxes from EU countries were small during the period under review. In 2000, a total of US\$ 2.2 million was exported, of which US\$ 1 million to non-EU countries.

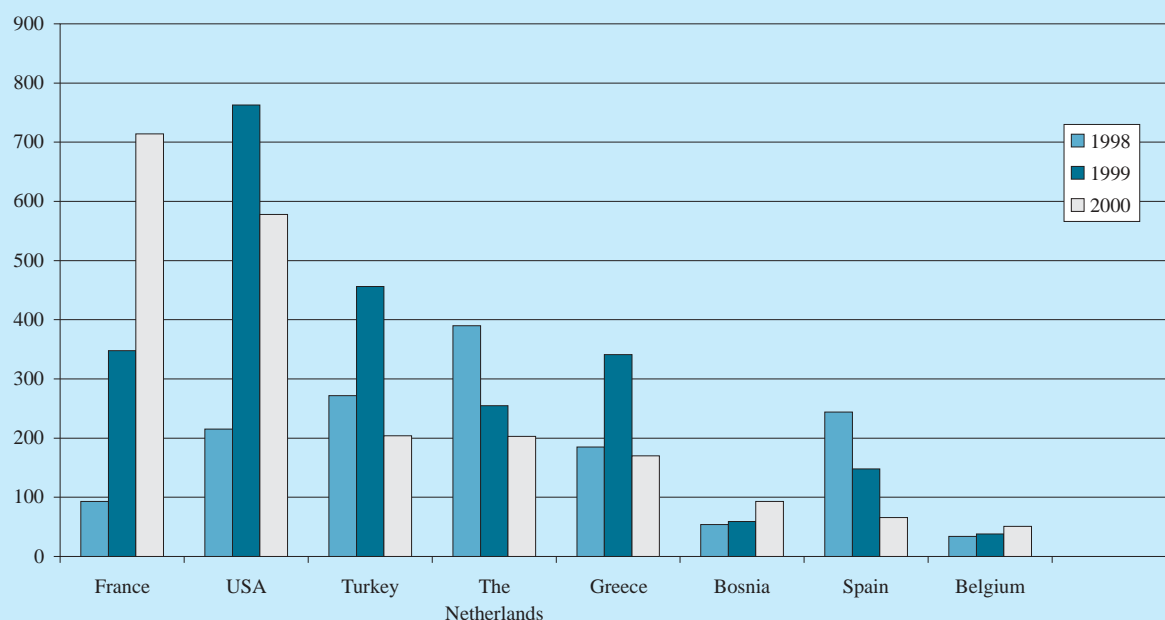
Germany was the largest exporting country in 2000 with US\$ 1.3 million, accounting for 58 percent of total EU exports, followed by Belgium with US\$ 0.7 million (31%).

Table 6.2 Exports of raw beeswax and other insect waxes from EU countries, 1998 -2000
US\$ 1,000 / € 1,000 / tonnes

	1998		1999			2000		
	value US\$	volume	value US\$	value €	volume	value US\$	value €	volume
Total	2,216	496	3,177	2,997	888	2,237	2,431	761
Germany	1,448	336	2,319	2,188	655	1,294	1,407	422
Belgium & Luxembourg	44	6	284	268	88	693	753	251
France	395	100	420	396	111	129	140	56
Italy	106	29	93	88	24	60	65	18
Spain	99	8	33	31	7	24	26	6
United Kingdom	65	7	25	24	3	19	21	3
Greece	28	5	0	0	0	16	17	5
Denmark	6	0	0	0	0	3	3	0
Finland	0	0	2	2	0	1	1	0
The Netherlands	0	0	0	0	0	0	0	0
Ireland	8	0	0	0	0	0	0	0
Portugal	0	0	0	0	0	0	0	0
Sweden	18	5	0	0	0	0	0	0
Austria	2	0	0	0	0	0	0	0

Source: Eurostat 2000

Figure 6.2 Leading destinations for exports of crude beeswax and other insect waxes from EU countries, US\$ thousand, 1998 - 2000



Source: Eurostat 2000

6.3 Beeswax and other insect waxes

Exports of beeswax and other insect waxes from EU countries increased again in 2000 to a value of US\$ 6.5 million compared to US\$ 6 million in 1999.

Export volume also increased from 1,221 tonnes in 1999 to 1,463 tonnes in 2000.

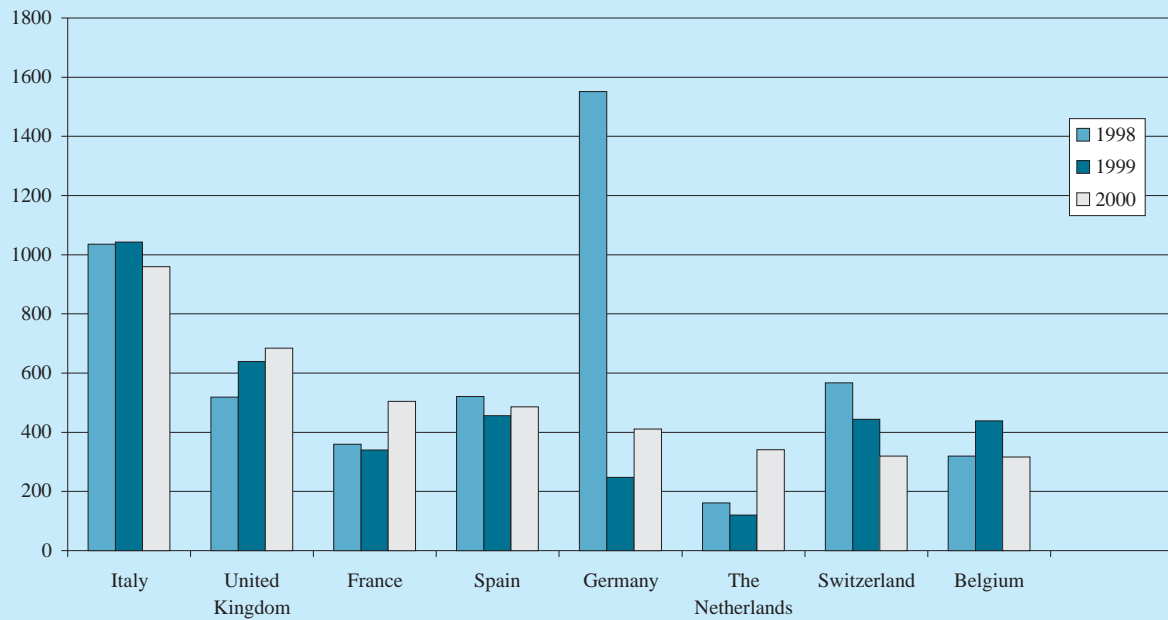
In 2000, exports to non-EU countries totalled US\$ 2.2 million, accounting for 34 percent of total EU exports.

Table 6.3 Exports of beeswax and other insect waxes from EU countries, 1998 -2000
US\$ 1,000 / € 1,000 / tonnes

	1998		1999			2000		
	value US\$	volume	value US\$	value €	volume	value US\$	value €	volume
Total	8,297	1,516	6,315	5,958	1,221	6,535	7,103	1,463
France	2,517	413	2,751	2,595	496	2,547	2,768	505
Germany	2,406	452	2,238	2,111	487	1,905	2,071	493
United Kingdom	1,263	185	664	626	88	837	910	132
Spain	252	79	95	90	31	516	561	115
Belgium & Luxembourg	1,717	361	388	366	76	494	537	131
Italy	87	20	78	74	12	97	105	22
Greece	7	0	35	33	21	59	64	29
Denmark	29	3	20	19	3	29	31	3
Sweden	7	0	7	7	1	25	27	26
Austria	12	3	40	38	6	24	26	7
Finland	0	0	1	1	0	5	5	0
The Netherlands	0	0	0	0	0	0	0	0
Ireland	0	0	0	0	0	0	0	0
Portugal	0	0	0	0	0	0	0	0

Source: Eurostat 2000

Figure 6.3 Leading destinations for exports of beeswax and other insect waxes from EU countries, US\$ thousand, 1998 - 2000



Source: Eurostat 2000

France was the largest exporting country in 2000 with US\$ 2.5 million accounting for 39 percent of total EU exports, followed by Germany with US\$ 1.9 million (29%) and United Kingdom with US\$ 0.8 million (12%).

7 TRADE STRUCTURE

7.1 EU trade channels

Producers, retailers, packers, importers and industry are all represented on the EU honey market.

7.1.1 Retailers

As an estimated 85 percent of honey in the EU is sold directly to consumers as consumption honey, the retailers (including beekeepers) play an important role in the distribution of honey to consumers. Super and hypermarkets constitute the most important outlets for honey. They belong to the big retail groups in the EU like Metro (Germany), Carrefour/Promodes (France), Tesco (UK) and Ahold (The Netherlands). Due to their size, they command a substantial buying power. Apart from the brands of honey suppliers, these retail groups all sell honey under their own brand to the consumers (private label or distribution brands). The private label products are sold at lower prices to the consumer, although the quality is not really different from the supplier's brands.

The second retail channel is the specialised shop that concentrates on organic and natural food products. Due to the increasing safety concerns, these shops have become more popular during recent years. Consumers look increasingly for natural, tasty and safe food without any chemical ingredients.

The specialised shops for organic and natural food cater to this trend.

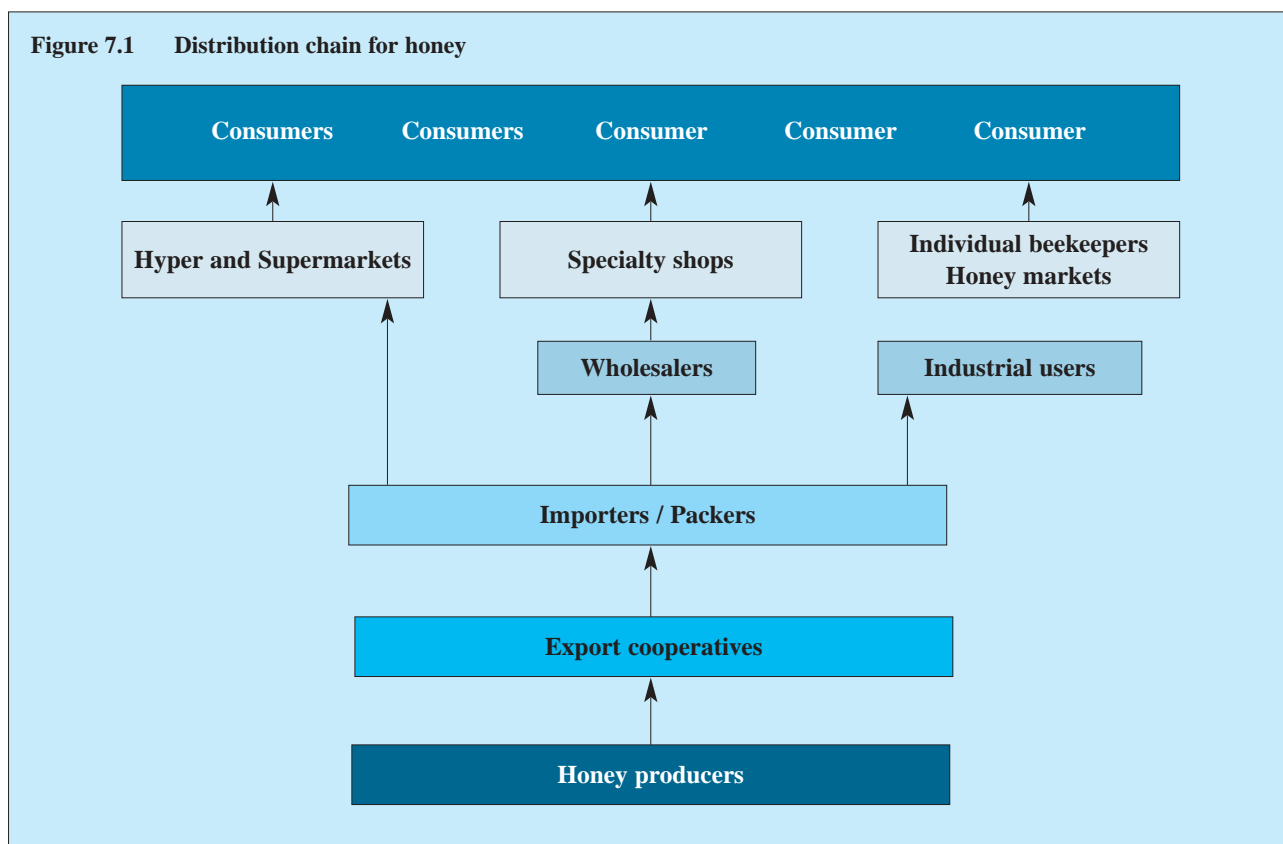
7.1.2 Packers

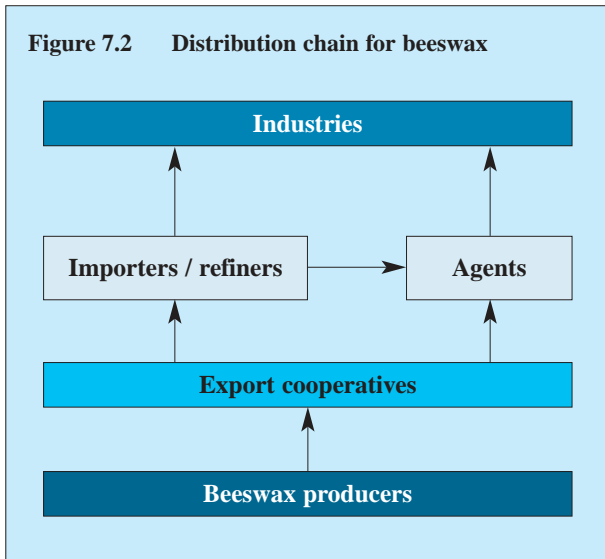
Three distinct types of packers can be identified for the honey sector in the EU:

- Packer-producers: beekeepers with facilities for processing and packing of honey. They sell directly to consumers, usually from their premises, or to retailers in the vicinity. They are often small businesses and they do not market imported honey.
- Packer-cooperatives: groups of beekeepers that purchase, process, pack and market honey, often under their own label. They sometimes purchase imported honey.
- Packers: they purchase honey both from beekeepers and importers. They have their own brand label and they also pack honey for other brands. Moreover, they supply retailers with their private label brands.

7.1.3 Importers

Importers usually combine the functions of importing honey into the EU with processing, blending and packing the honey. They sell the end product to wholesalers and retailers in consumer packaging and in bulk to industrial users.





A small number of specialised importers and refiners in EU countries imports raw beeswax. They trade either directly with producers in supplying countries or through an agent or export-cooperative.

Beeswax can be stored and kept for a long period of time. It can be collected by traders and sold when trading conditions are favourable.

7.2 Distribution channels for developing country exporters

Honey and beeswax producers in developing countries are advised to sell through their export cooperatives or to contact agents and importers/packers in EU countries. They should send samples (about 100 grams) to potential trade partners in the EU, stating date of harvesting and the production area.

Trade fairs and beekeepers congresses can be an important meeting point for exporters from developing countries, especially when an api-expo is attached to it. The EU Strategic Marketing Guide 'Honey and beeswax' and Appendix 5 of this survey provide more details on trade fairs.

Further contact with expert advisers in the EU, to improve production and processing of honey, is recommended in order to match the quality requirements of importers in the EU.

Exporters of organically grown products can get themselves listed on www.green-tradenet.de a site where suppliers and purchasers come together on an open market place. It is useful to be informed beforehand about the requirements of organic production (see organic beekeeping methods).

8 PRICES AND MARGINS

8.1 Prices and margins

Prices for honey and beeswax depend on the following factors:

- *Supply and demand.* During the last twenty years, prices for honey remained basically within the same range of slightly less than US\$1 per kg for light to extra light amber honey without any defects. An abundant harvest in the importing country increases the honey supply on the market and tends to bring the prices down. Weather conditions, bee diseases and pest control are important factors in determining the harvest. Due to poor weather conditions in 2002 in EU countries and the USA, coupled to the ban on imports of Chinese honey in major EU markets, prices soared during 2002 to unprecedented levels. The worldwide shortage of honey is expected to continue into 2003, resulting in high prices for some time to come.
- *Quality and grade.* The price class is determined by the quality of the honey. Table grade honey (US grade A) fetches higher prices than industrial grade honey (US grade C or D). Monoflorous and special honeys fetch higher prices than polyfloral honeys.
- *Colour.* In general, light-coloured honeys bring the highest price, except for special honeys (dark amber or bitter). The dark ones are most frequently used for industrial production and bring lower prices.
- *Composition.* Some importers require extra low moisture and HMF values for prime grades, but colour (not a quality) determines the final price once the minimum quality requirements within each grade are fulfilled.
- *Character.* Mild flavoured honeys are preferred, but characteristically flavoured honeys bring top prices in some countries. Large honey packers usually prefer honeys with a low tendency to crystallize. Some unifloral honeys such as Hungarian Black Locust honey bring twice the price of regular, multifloral honey.
- *Substitution products.* Cheaper synthetic waxes can often replace beeswax. Compromises in quality are accepted by manufacturers because of reduced costs and greater availability of synthetic waxes. Honey can be replaced, for example, by beet sugar syrup and corn syrup.

- *Economic factors.* Developing countries may decide to supply honey at lower prices than those fetched locally in order to attract foreign currencies their economies need. Consumption in industrialised countries is influenced strongly by the prevailing economic situation, which affects demand for honey.

Margins for the trade depend very much on the country involved and on the supply and demand situation. As a rough indication, the margins for the different trade partners are as follows:

- importer: 8 – 10 percent
- wholesaler: 12 – 15 percent
- retailer: 20 – 25 percent

An indication of average retail prices in leading EU markets during 1998 – 2000 were:

- Germany: US\$ 7.00 per kg
- France: US\$ 10.00 per kg
- Italy: US\$ 5.50 per kg

The table on the next page shows the retail prices for honey in different types of packaging offered to consumers in selected EU countries:

8.2 Sources of price information

Importers form the main source of price information, as they are in daily touch with the major trading centres around the world.

The specialised trade magazine 'The Public Ledger World Commodities Weekly' provides price information on a weekly basis for a number of traded honeys (Chinese white, Chinese extra light amber, Mexican Yucatan and Mexican orange Blossom).

Prices are based on CIF main European port in US\$ per metric tonne. Apart from the current and previous week, also the highest and lowest prices are given for the year under review.

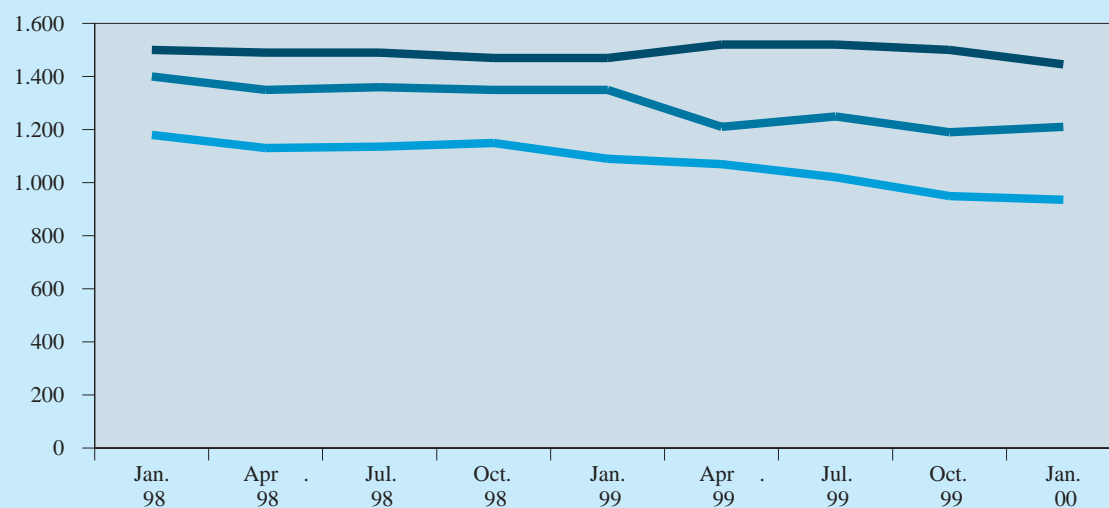
Full addresses and contact details are mentioned in Appendix 4.

Further, the website www.apiculture.com provides (under the heading: databases/honey-market/Europe_cif) CIF prices in main European ports on a monthly basis for Chinese, Mexican, Argentinean and Australian varieties.

Table 8.1 Honey products in retail packaging sold to consumers in different EU countries

Country	Brand	Packaging	Price in €
The Netherlands	Beekeepers' honey, labeled individually	Glass jar 450 g	3.10 – 5.75 (heather)
		Glass jar 900 g	5.50
		Glass jar 250 g	2.25
	Heather comb, no brand	Container 100 – 1000 g	2.10 per 100 g
	Langnese Clover honey	Glass jar 250 g	1.99
	Langnese Flower honey	Glass jar 500 g	2.99
	Langnese Flower honey	Plastic jar 500 g	3.69
	Mellona	Plastic jar 250 g	2.26
	Mellona	Plastic jar 450 g	2.99
	AH (private label)	Glass jar 900 g	4.79
Germany	Goldland Bienen Honig	Glass jar 500 g	1.49
	Goldland Klee-Linde	Glass jar 500 g	1.79
	Langnese Bergbluten Honig	Glass jar 375 g	2.49
	Breitsamer	Glass jar 250 g	1.59
	Langnese Flotte Biene	Plastic jar 250 g	2.19
	Immenhof	Glass jar 500 g	1.79
	Goldland Waldhonig	Plastic jar 500 g	2.29
	France	Lune de Miel (Acacia)	Glass jar 250 g
Lune de Miel (Cremeux)		Glass jar 250 g	1.95
Miel l'Apiculture		Carton 500 g	3.75
Miel toutes fleurs (liquide) – private label		Glass jar 500g	2.27

Figure 8.1 Honey CIF prices in main European ports, US\$ per metric ton, 1998 - 2000



■ Chinese white
 ■ Mexican Yucatan
 ■ Australian extra light amber

9 OPPORTUNITIES FOR EXPORTERS

Opportunities for exporters in developing countries lie in the following fields:

- *Organic honey*
Although still a small segment, the market for organic ingredients is expected to grow substantially in the coming years.
- *Special honey*
Consumers in the EU market who originate in countries outside the EU form an increasing part of the EU population. They may prefer their own country-special honey types, like dark amber ‘medicinal’ honey or bitter honey
- *Other hive products*
Although still a small segment, the market for pollen, royal jelly, propolis and bee venom is expected to grow substantially in the coming years
- *Integrated chain control*
Tracing and tracking of food products is increasingly required by food processors in the EU. Suppliers in developing countries who have a system of tracing and tracking, supported by documentation have a competitive advantage in dealing with EU importers.
- *HACCP and ISO certification*
Suppliers who have the above-mentioned certification in the future will have a major competitive advantage, as these certifications provide guarantees on quality assurance and food safety.
- *Logistics*
Processors/importers in the EU set high standards in respect of the logistical system of exporters. Suppliers of honey and beeswax in developing countries who form partnerships with strong and well-organised shippers to EU countries are in a better position to meet the requirements of customers in the EU.

Please refer also to the EU Strategic Marketing Guide ‘Honey and beeswax’.

APPENDIX 1

DETAILED IMPORT STATISTICS

The source of the data presented below is Eurostat COMEXT 2000.

**Table 1.1 Imports of natural honey into the EU, 1998-2000,
US\$ 1,000/ € 1,000/ tonnes**

	1998		1999			2000		
	value US\$	volume	value US\$	value €	volume	value US\$	value €	volume
Total	299,495	192,642	256,833	242,295	192,790	227,762	247,567	193,791
Extra-EU	213,220	152,402	178,577	168,469	151,327	161,894	175,972	154,728
Developing countries	168,877	127,945	133,867	126,290	121,873	117,373	127,579	118,399
Germany	139,190	94,802	114,579	108,093	90,961	103,408	112,400	93,982
United Kingdom	35,716	24,715	26,462	24,964	22,903	23,554	25,602	22,563
France	24,354	12,503	25,548	24,102	15,320	21,552	23,426	15,666
Italy	19,479	12,155	16,611	15,671	12,481	14,955	16,255	12,487
Belgium & Luxembourg	14,271	9,142	13,907	13,120	9,660	14,334	15,580	10,165
Spain	13,863	10,721	13,822	13,040	13,333	13,055	14,190	13,238
The Netherlands	15,338	7,857	15,218	14,357	8,313	11,884	12,917	7,303
Austria	8,366	4,585	7,942	7,492	5,633	6,388	6,944	4,441
Denmark	10,577	6,828	6,829	6,442	5,113	5,603	6,090	5,322
Sweden	6,229	2,902	5,539	5,225	2,926	4,138	4,498	2,365
Greece	5,612	3,016	4,257	4,016	2,616	2,703	2,938	2,179
Portugal	1,907	1,001	1,818	1,715	1,123	2,521	2,740	1,797
Finland	2,400	1,168	2,340	2,208	1,271	2,049	2,227	1,309
Ireland	2,188	1,247	1,959	1,848	1,137	1,618	1,759	1,074

Source : Eurostat 2000

**Table 1.2 Imports of crude beeswax and other insect waxes into the EU, 1998 – 2000,
US\$ 1,000/ € 1,000/ tonnes**

	1998		1999			2000		
	value US\$	volume	value US\$	value €	volume	value US\$	value €	volume
Total	13,607	3,624	11,326	10,685	3,830	9,961	10,827	3,516
Extra-EU	12,380	3,361	10,193	9,616	3,408	9,249	10,053	3,319
Developing countries	6,664	1,826	6,236	5,883	2,084	6,458	7,020	2,336
Germany	8,605	2,375	6,566	6,194	2,346	6,110	6,641	2,269
France	2,059	542	1,649	1,556	476	1,493	1,623	541
Italy	769	205	988	932	336	844	917	264
United Kingdom	991	243	1,041	982	335	660	717	178
Greece	183	49	321	303	81	258	280	94
Spain	521	123	419	395	111	208	226	65
Belgium & Luxembourg	329	55	176	166	51	175	190	64
Ireland	6	1	3	3	0	147	160	25
Austria	28	6	14	13	4	21	23	5
Sweden	95	21	67	63	22	18	20	4
Portugal	0	0	41	39	58	16	17	5
Finland	20	4	43	41	10	7	8	1
Denmark	4	0	0	0	0	3	3	1
The Netherlands	0	0	0	0	0	0	0	0

Source : Eurostat 2000

Table 1.3 Imports of beeswax and other insect waxes into the EU, 1998 – 2000
US\$ 1,000/ € 1,000/ tonnes

	1998		1999			2000		
	value US\$	volume	value US\$	value €	volume	value US\$	value €	volume
Total	7,022	1,617	7,826	7,383	1,776	7,767	8,442	2,209
Extra-EU	1,323	339	1,556	1,468	420	1,317	1,431	660
Developing countries	978	265	1,098	1,036	324	997	1,084	570
France	788	173	1,100	1,038	309	1,456	1,583	368
United Kingdom	972	401	1,211	1,142	265	1,165	1,266	232
Greece	862	296	1,407	1,327	478	1,102	1,198	661
Italy	1,165	161	1,215	1,146	116	1,023	1,112	147
Spain	756	150	538	508	88	1,020	1,109	304
Germany	811	163	969	914	226	741	805	197
Belgium & Luxembourg	945	181	562	531	149	568	618	160
Finland	237	28	248	234	31	253	275	36
Austria	88	15	151	142	63	132	144	27
Denmark	134	12	239	225	19	91	99	11
Ireland	88	16	68	64	12	85	92	19
Sweden	100	11	50	47	6	77	84	37
Portugal	74	10	70	66	14	52	57	10
The Netherlands	0	0	0	0	0	0	0	0

Source : Eurostat 2000

Table 1.4 Imports of honey and beeswax into Germany, 1998-2000
US\$ 1,000/ € 1,000/ tonnes

	1998		1999			2000		
	value US\$	volume	value US\$	value €	volume	value US\$	value €	volume
Total	148,606	97,340	122,113	115,201	93,533	110,258	119,846	96,448
Extra-EU	133,935	91,297	109,249	103,065	87,752	102,551	111,468	92,737
Developing countries	108,249	78,551	83,465	78,741	71,413	76,616	83,278	72,239
<i>Leading suppliers</i>								
Argentina	20,494	15,469	30,176	28,468	27,346	27,603	30,003	27,815
Mexico	20,266	13,597	17,909	16,895	14,298	18,807	20,442	16,048
China	36,425	29,892	14,231	13,425	13,522	9,601	10,436	10,717
Romania	4,759	2,958	6,610	6,236	4,932	8,152	8,861	6,975
Hungary	3,764	1,811	4,228	3,989	2,386	4,461	4,849	3,598

Source : Eurostat 2000

Table 1.5 Imports of honey and beeswax into the United Kingdom, 1998-2000
US\$ 1,000/ € 1,000/ tonnes

	1998		1999			2000		
	value US\$	volume	value US\$	value €	volume	value US\$	value €	volume
Total	37,679	25,359	28,713	27,088	23,503	25,378	27,585	22,973
Extra-EU	31,130	22,527	23,702	22,360	21,165	20,067	21,812	20,559
Developing countries	24,012	18,545	18,360	17,321	18,016	15,458	16,802	17,448
<i>Leading suppliers</i>								
China	12,958	11,005	8,306	7,836	9,518	7,667	8,334	10,263
Mexico	4,956	3,480	3,160	2,981	2,948	3,114	3,385	3,045
Germany	2,666	1,188	2,309	2,178	1,075	2,579	2,803	1,260
Argentina	3,003	2,297	3,794	3,579	3,527	2,338	2,541	2,217
Australia	4,047	2,472	2,418	2,281	1,797	2,215	2,408	1,675

Source : Eurostat 2000

Table 1.6 Imports of honey and beeswax into France, 1998-2000
US\$ 1,000/ € 1,000/ tonnes

	1998		1999			2000		
	value US\$	volume	value US\$	value €	volume	value US\$	value €	volume
Total	27,201	13,218	28,298	26,696	16,105	24,501	26,632	16,575
Extra-EU	7,688	3,565	8,149	7,688	4,656	7,987	8,682	5,798
Developing countries	4,356	2,273	3,756	3,543	2,580	3,085	3,353	2,196
<i>Leading suppliers</i>								
Germany	7,483	3,427	8,240	7,774	4,838	7,141	7,762	4,701
Spain	5,367	2,748	5,635	5,316	2,957	3,956	4,300	2,255
Hungary	2,669	1,035	3,535	3,335	1,7373	3,833	4,166	2,772
Belgium	0	0	4,010	3,783	2,540	3,658	3,976	2,737
China	3,090	1,656	2,074	1,957	1,253	1,465	1,592	903

Source : Eurostat 2000

Table 1.7 Imports of honey and beeswax into Italy, 1998-2000
US\$ 1,000/ € 1,000/ tonnes

	1998		1999			2000		
	value US\$	volume	value US\$	value €	volume	value US\$	value €	volume
Total	21,413	12,521	18,814	17,749	12,933	16,821	18,284	12,898
Extra-EU	16,113	10,712	14,443	13,625	11,474	13,057	14,192	11,359
Developing countries	10,475	7,703	8,840	8,340	7,704	8,039	8,738	7,241
<i>Leading suppliers</i>								
Argentina	8,831	6,709	7,099	6,697	6,652	6,699	7,281	6,445
Hungary	4,017	1,949	3,090	2,915	1,928	3,479	3,782	2,718
Germany	3,246	1,250	2,420	2,283	988	1,874	2,037	945
France	936	142	1,050	991	154	819	890	138
China	1,023	623	1,113	1,050	623	818	889	479

Source : Eurostat 2000

Table 1.8 Imports of honey and beeswax into The Netherlands, 1998-2000
US\$ 1,000/ € 1,000/ tonnes

	1998		1999			2000		
	value US\$	volume	value US\$	value €	volume	value US\$	value €	volume
Total	15,338	7,857	15,218	14,357	8,313	11,884	12,917	7,303
Extra-EU	4,383	3,278	4,696	4,430	3,685	3,256	3,539	2,868
Developing countries	3,968	3,068	4,050	3,821	3,349	2,762	3,002	2,530
<i>Leading suppliers</i>								
Germany	10,032	4,090	6,751	6,369	3,227	4,213	4,579	2,601
Belgium	0	0	3,479	3,282	1,245	4,063	4,416	1,682
China	1,644	1,552	1,649	1,556	1,710	799	868	1,140
Turkey	264	85	395	373	105	521	566	156
Argentina	548	377	576	543	469	456	496	428

Source : Eurostat 2000

APPENDIX 2 STANDARDS ORGANISATIONS

INTERNATIONAL

International Standardisation Institute (ISO)

Address: P.O. Box 56,
CH-1211 Geneva, Switzerland
Telephone: + 41 (0) 22 7490111
Fax: + 41 (0) 22 7333430
E-mail: central@iso.ch
Internet: www.iso.ch

EUROPEAN UNION

Comité Européen de Normalisation (CEN)

European Normalisation Committee

Address: Third countries Unit, Rue de Stassart 36,
B-1050 Brussels, Belgium
Telephone: + 32 (0) 2 5500811
Fax: + 32 (0) 2 5500819
E-mail: infodesk@cenorm.be
Internet: www.cenorm.be

SGS European Quality Certification Institute E.E.S.V.

Address: P.O. Box 200,
3200 AE Spijkenisse, The Netherlands
Telephone: + 31 (0) 181-693750
Fax: + 31 (0) 181-693582

FRANCE

Association Française de Normalisation (AFNOR)

Address: Tour Europe,
92049 Paris La Défense Cedex, France
Telephone: + 33 (0) 1 42915555
Fax: + 33 (0) 1 42915656
Internet: www.afnor.fr

GERMANY

Deutsches Institut für Normung eV (DIN)

Address: Burggrafenstrasse 4-10,
10772 Berlin, Germany
Telephone: + 49 (0) 30 2601 0
Fax: + 49 (0) 30 2601 1231
E-mail: postmaster@din.de
Internet: www.din.de

RAL Deutsches Institut für Gütesicherung und Kennzeichnung e.V.

Address: Siegburger Straße 39,
53757 Sankt Augustin, Germany
Telephone: 02241/1605-0
Fax: 02241/1605-11
E-mail: RAL-Institut@t-online.de
Internet: www.ral.de

ITALY

Ente Nazionale Italiano di Unificazione (UNI)

Address: Via Battinotti Stassi 11A,
20100 Milan, Italy
Telephone: + 39 02 700241
Fax: + 39 02 70106106
E-mail: uni@uni.com
Internet: www.unicei.it

THE NETHERLANDS

Nederlands Normalisatie Instituut (NNI)

Netherlands Standardisation Institute

Address: P.O.Box 5059,
2600 GB Delft, The Netherlands
Telephone: + 31 (0) 15 2690390
Fax: + 31 (0) 15 2690190
E-mail: info@nni.nl
Internet: www.nni.nl

UNITED KINGDOM

British Standards Institution (BSI)

Address: British Standards House,
389 Chiswick High Road,
London W4 4AL, United Kingdom
Telephone: + 44 (0) 208 996 90 00
Fax: + 44 (0) 208 996 74 00
E-mail: info@bsi.org.uk
Internet: www.bsi.org.uk

BM TRADA Certification Limited

Address: Hughenden Valley, High Wycombe,
Bucks HP14 4NR, United Kingdom
Telephone: + 44 (0) 1494 569700
Fax: + 44 (0) 1494 565487
E-mail: enquiries@bmtrada.com
Internet: www.bmtrada.com

APPENDIX 3 SOURCES OF PRICE INFORMATION

The Public Ledger

Address: 80 Calverley Road, Tunbridge Wells,
Kent TN1 2UN, United Kingdom
Telephone: + 44 (0) 1892 533813
Fax: + 44 (0) 1892 544895
E-mail: marketing@public-ledger.com
Internet: www.public-ledger.com

Publishes “The Public Ledger”; average wholesale prices in the UK and major European markets on a weekly and monthly basis. On-line price information available.

FAO (Food and Agriculture Organization)

Address: Via delle Terme di Caracalla,
00100 Rome, Italy
Telephone: + 39 (0) 6 57051
Fax: + 39 (0) 6 57053152
E-mail: publication-sales@FAO.org
Internet: www.fao.org

Publishes “Commodity and Market review”

APPENDIX 4 TRADE ASSOCIATIONS

WORLDWIDE

International Federation of Beekeeper's Associations

Address: Corso Vittorio Emanuele 101,
00186 Rome, Italy
Telephone: + 39. 0668 522 86
Fax: + 39. 0668 522 86
E-mail: apimondia@mclink.it
Internet: www.apimondia.org

EUROPEAN

Federation of European Honey Importers and Packers (FEEDM)

Address: Grosse Däckerstrasse 4,
20095 Hamburg, Germany
Telephone: + 49 (0) 40 374 71 90
Fax: + 49 (0) 40 374 719 19
E-mail: info@waren-verein.de

European Professional Beekeepers' Association

Address: Hauptstrasse 67,
77728 Oppenau, Germany
Telephone: + 49 (0) 7804 520
Fax: + 49 (0) 7804 2287
E-mail: iTKoch@T-online.de
Internet: www.beekeeping.org/epba/

FRANCE

Union National de l'Apiculture Française

Address: 26 Rue des Tournelles,
75004 Paris
Telephone: + 33 (0) 1 4887 47 15
Fax: + 33 (0) 1 4887 76 44
E-mail: unaf@wanadoo.fr
Internet: www.apiculture.com/rfa

Syndicat National de l' Apiculture

Address: 26 Rue de Copenhague,
75008 Paris
Telephone: + 33 (0) 1 4522 4842
Fax: + 33 (0) 1 4293 7785
E-mail: abeille.de.france@wanadoo.fr
Internet: www.apiculture.com/abeille-de-france/

GERMANY

Honig Verband der BRD

Address: Grosse Däckerstrasse 4,
20095 Hamburg, Germany
Telephone: + 49 (0) 40 374 71 90
Fax: + 49 (0) 40 374 719 19
E-mail: info@waren-verein.de

Deutscher Imker Bund (German Beekeepers' Association)

Address: Philippe Hauptstrasse 3,
53343 Wachtberg
Telephone: + 49 (0) 228 32 10 06
Fax: + 49 (0) 228 32 10 09

Deutsche Apitherapie Bund e.V.

Address: Kapuzinerstrasse 49,
94032 Passau, Germany
Telephone: + 49 (0) 851 9347005
Fax: + 49 (0) 851 87588
E-mail: info@apitherapie.de
Internet: www.apitherapie.de

UNITED KINGDOM

British Honey Importers and Packers Association

Address: 4 Bedford Square,
London WC1 3RA
Telephone: + 44 (0) 20 7255 1100
Fax: + 44 (0) 20 7631 0602
E-mail: info@honeyassociation.com
Internet: www.honeyassociation.com

APPENDIX 5 TRADE FAIR ORGANISERS

GERMANY

Anuga

Frequency: biennial (2003 Cologne)
Address: Köln Messe, Messeplatz 1,
50679 Cologne, Germany
Telephone: + 49 (0) 221 821 0
Fax: + 49 (0) 221 821 2574
E-mail: anuga@koelnmesse.de
Internet: www.koelnmesse.de/anuga

Food and beverages

Bio Fach

Frequency: annual (Nuremberg)
Address: Industriestrasse 12,
91186 Büchenbach, Germany
Telephone: + 49 (0) 91 714011
Fax: + 49 (0) 91 714016
E-mail: info@biofach.de
Internet: www.biofach.de

Certified organic food and beverages

FRANCE

SIAL

Frequency: biennial (2002 Paris)
Address: 1 Rue du Parc,
92593 Levallois-Perret, France
Telephone: + 33 (0) 1 49 68 54 99
Fax: + 33 (0) 1 47 31 37 82
E-mail: info@sial.fr
Internet: www.sial.fr

Food and beverages

Health Ingredients Europe

CMP Information.

Frequency: biennial (alternate with Food
Ingredients Europe)
Address: P.O.Box 200,
3600 AE Maarssen
Telephone: + 31 (0) 346 55 94 44
Fax: + 31 (0) 346 57 38 11
E-mail: fi@cmpinformation.com
Internet: www.fi-events.com

*Food ingredients, semi-finished products, product
development and quality control*

UNITED KINGDOM

Food Ingredients Europe

CMP Information.

Frequency: biennial (alternates with Health Ingredients
Europe; 2002 Paris)
Address: P.O.Box 200,
3600 AE Maarssen
Telephone: + 31 (0) 346 55 94 44
Fax: + 31 (0) 346 57 38 11
E-mail: fi@cmpinformation.com
Internet: www.fi-events.com

Ingredients for health, functional and organic foods

IFE

Frequency: biennial
Address: 11 Manchester Square,
London W1M 5AB, United Kingdom
Telephone: + 44 (0) 20 7886 3100
Fax: + 44 (0) 20 7886 3031
E-mail: ife@freshrm.co.uk
Internet: www.ife99.com

Food and beverages

THE NETHERLANDS

Natural Products Expo Europe

Penton Media Europe Ltd

Frequency: annual (Amsterdam)
Address: 61 Southwark Street,
London SE1 0HL, United Kingdom
Telephone: + 44 (0) 20 7620 0001
Fax: + 44 (0) 20 7401 3966
E-mail: katharine.tooby@pentoneurope.com
Internet: www.expoeurope.com

*Organic and natural food and beverages and food
supplements*

ITALY

Sana

Fiere e Comunicazioni

Frequency: biennial (2002 Bologna)
Address: Illaria Borri, Via San Vittore 14,
I-20123 Milan, Italy
Telephone: + 39 02 86 45 10 78
Fax: + 39 02 86 45 35 06
E-mail: info@sana.it
Internet: www.sana.it

*Health and nutritional products; environment-friendly
agriculture*

APPENDIX 6 TRADE PRESS

INTERNATIONAL

International Bee Research Association

Address: 18 North Road,
Cardiff CF1 3DT, United Kingdom
Telephone: + 44 (0) 29 2037 2409
Fax: + 44 (0) 20 2066 5522
E-mail: mail@ibra.org.uk
Internet: www.ibra.org.uk

Publishes 'Bee World' on a quarterly basis, 'Journal of Apicultural Research' and 'Apicultural Abstracts'

GERMANY

Deutsche Apitherapie Zeitung

Address: Kapuzinerstrasse. 49,
94032 Passau, Germany
Telephone: + 49 (0) 851 9347005
Fax: + 49 (0) 851 87588
E-mail: info@apitherapie.de
Internet: www.apitherapie.de

UNITED KINGDOM

The Public Ledger

Address: 80 Calverly Road, Turnbridge Wells,
Kent TN1 2UN, United Kingdom
Telephone: + 44 (0) 1892 53 38 13
Fax: + 44 (0) 1892 54 48 95
E-mail: marketing@public-ledger.com
Internet: www.public-ledger.com

Publishes "The Public Ledger" on a weekly + monthly basis

APPENDIX 7 BUSINESS SUPPORT ORGANISATIONS

INTERNATIONAL

International Trade Centre UNCTAD/WTO (ITC)

Address: Palais des Nations, P.O. Box 10,
1211 Geneva 10, Switzerland
Telephone: (41) 22-7300111
Fax: (41) 22-7334439
E-mail: itcreg@intracen.org
Internet: www.intracen.org

AUSTRIA

Austrian Federal Economic Chamber

Address: P.O. Box 150,
A-1045 Vienna, Austria
Telephone: + 43 (0) 1 501050
Fax: + 43 (0) 1 50105-150
E-mail: aw-online@aw.wk.or.at
Internet: www.wk.or.at/aw/aw_intl/index.htm

DENMARK

Danish Import Promotion Office for Products from Developing Countries (DIPO)

Address: Danish Chamber of Commerce, Børsen,
1217 Copenhagen, Denmark
Telephone: + 45 (0) 33 950541
Fax: + 45 (0) 33 120525
E-mail: dipo@commerce.dk
Internet: www.dipo.dk

GERMANY

BFAI, Federal Office of Foreign Trade Information

Address: Agrippastrasse 87-93, P. O. Box 100522,
50455 Cologne, Germany
Telephone: + 49 (0) 221 2057-0
Fax: + 49 (0) 221 2057-212
E-mail: bus.contacts@bfai.com
Internet: www.bfai.com

ITALY

ICE

Italian National Institute for Foreign Trade

Address: Via Liszt 21,
00144 Rome, Italy
Telephone: + 39 06 59921
Fax: + 39 0659926900
E-mail: ice@ice.it
Internet: www.ice.it

THE NETHERLANDS

CBI, Centre for the Promotion of Imports from developing countries

Address: P.O. Box 30009,
3001 DA Rotterdam, The Netherlands
Telephone: + 31 (0) 10 2013434
Fax: + 31 (0) 10 4114081
E-mail: cbi@cbi.nl
Internet: www.cbi.nl

NORWAY

Norwegian Agency for Development Co-operation (Norad)

Address: Tolbugaten 31, P.O. Box 8034 Deo,
Oslo, Norway
Telephone: + 41 (0) 22 242030
Fax: + 41 (0) 22 242031
Internet: www.norad.no

SWEDEN

Swedish International Development Co-operation Agency - Department for Infrastructure & Economic Co-operation (SIDA)

Address: Sveavägen 20,
S-105 25 Stockholm, Sweden
Telephone: + 46 (0) 8 6985000
Fax: + 46 (0) 8 6208864
E-mail: sida@sida.org.se
Internet: www.sida.se

SWITZERLAND

SIPPO, Swiss Import Promotion Programme

Address: Avenue de l'Avant-Poste 4,
CH-1001 Lausanne, Switzerland
Telephone: + 41 (0) 21 320 32 31
Fax: + 41 (0) 21 320 73 37
E-mail: info@sippo.ch
Internet: www.sippo.ch

APPENDIX 8 OTHER USEFUL ADDRESSES

INTERNATIONAL

International Chamber of Commerce

Address: 38, Cours Albert 1er,
75008 Paris, France
Telephone: + 33 (0) 1 49 53 28 28
Fax: + 33 (0) 1 49 53 29 42
E-mail: icc@iccwbo.org
Internet: www.iccwbo.org

IFOAM (International Federation of Organic Agricultural Movement)

Address: Bldg. 20, 8801 East Saanich Road,
Sidney BC, V8L 1H3, Canada
Telephone: + 1 (0) 250 655 5662
Fax: + 1 (0) 250 655 5657
E-mail: ifoam2002@cog.ca
Internet: www.cog.ca/ifoam2002

FAO

Address: Ville delle Terme di Caracalla,
00100 Rome, Italy
Telephone: + 39 06 57054778
Fax: + 39 06 57052151
E-mail: info@fao.org
Internet: www.fao.org

UNCTAD

(United Nations Conference on Trade and Development)

Address: Palais des Nations,
CH-1211 Geneva, Switzerland
Telephone: + 41 (0) 22 90712 34
Fax: + 41 (0) 22 9070043
E-mail: ers@unctad.org
Internet: www.unctad.org

EUROPE

Contact point EU ECO-label

Commission of the European Communities
Address: DG XI-E4, Rue de la Loi 200,
1049 Brussels, Belgium
Telephone: + 32 (0) 2 2990324
Fax: + 32 (0) 2 2955684
Internet: www.europa.eu.int/ecolabel

GERMANY

Ecocert International

(Certification organisation for organic products)

Address: Foerster Strasse 87,
D-37520 Osterode-Förste, Germany
Telephone: + 49 (0) 5522 951 161
Fax: + 49 (0) 5522 951 164
E-mail: info@ecocert.de
Internet: www.ecocert.com

Institut für Honiganalytik

(Institute for the Analysis of Honey)
Address: Flughafendamm 9a,
28199 Bremen, Germany
Telephone: + 49 (0) 421 594770
Fax: + 49 (0) 421 594771

THE NETHERLANDS

CBI/Accessguide

(CBI's database on European non-tariff trade barriers)

Address: P.O. Box 30009,
3001 DA Rotterdam, The Netherlands
Telephone: + 31 (0) 10 2013434
Fax: + 31 (0) 10 4114081
Email: accessguide@cbi.nl
Internet: www.cbi.nl/accessguide

SKAL

(Certification organisation for organic products)

Address: P.O. Box 384,
8000 AJ Zwolle, The Netherlands
Telephone: + 31 (0) 38 4268181
Fax: + 31 (0) 38 4213063
E-mail: info@skal.com
Internet: www.skal.com

Praktijkonderzoek Plant en Omgeving (PPO), sector bees

Address: Ambrosiusweg 1,
5081 NV Hilvarenbeek, The Netherlands
Telephone: + 31 (0) 13 5833340
Fax: + 31 (0) 13 5439155
E-mail: infobijen@ppo.dlo.nl
Internet: www.ppo.dlo.nl

UNITED KINGDOM

Soil Association Certification Ltd

(Certification organisation for organic products)

Address: Bristol House, 40-56 Victoria Street, Bristol,
Avon BS1 6BY, United Kingdom
Telephone: + 44 (0) 117 929 0661
Fax: + 44 (0) 117 925 2504
E-mail: info@soilassociation.org
Internet: www.soilassociation.org

APPENDIX 9 LIST OF DEVELOPING COUNTRIES

Please note that the OECD list of developing countries, as applied in this market survey, may include countries that are usually not considered as developing countries (e.g. South Korea)

Afghanistan	Guatemala	Pakistan
Albania	Guinea	Palau Islands
Algeria	Guinea-Bissau	Palestinian Admin. Areas
Angola	Guyana	Panama
Anguilla	Haiti	Papua New Guinea
Antigua and Barbuda	Honduras	Paraguay
Argentina	India	Peru
Armenia	Indonesia	Philippines
Aruba	Iran	Rwanda
Azerbaijan	Iraq	São Tomé & Príncipe
Bahrain	Jamaica	Saudi Arabia
Bangladesh	Jordan	Senegal
Barbados	Kazakstan	Seychelles
Belize	Kenya	Sierra Leone
Benin	Kiribati	Slovenia
Bhutan	Korea, Rep. of	Solomon Islands
Bolivia	Korea, South	Somalia
Bosnia & Herzegovina	Kyrgyz Rep.	South Africa
Botswana	Laos	Sri Lanka
Brazil	Lebanon	St. Helena
Burkina Faso	Lesotho	St. Kitts-Nevis
Burundi	Liberia	St. Lucia
Cambodia	Libya	St. Vincent and Grenadines
Cameroon	Macao	Sudan
Cape Verde	Macedonia	Surinam
Central African rep.	Madagascar	Swaziland
Chad	Malawi	Syria
Chile	Malaysia	Tajikistan
China	Maldives	Tanzania
Colombia	Mali	Thailand
Comoros	Malta	Timor
Congo	Marshall Islands	Togo
Cook Islands	Mauritania	Tokelau
Costa Rica	Mauritius	Tonga
Côte d'Ivoire	Mayotte	Trinidad & Tobago
Croatia	Mexico	Tunisia
Cuba	Micronesia, Fed. States	Turkey
Djibouti	Moldova	Turkmenistan
Dominica	Mongolia	Turks & Caicos Islands
Dominican republic	Montserrat	Tuvalu
Ecuador	Morocco	Uganda
Egypt	Mozambique	Uruguay
El Salvador	Myanmar	Uzbekistan
Equatorial Guinea	Namibia	Vanuatu
Eritrea	Nauru	Venezuela
Ethiopia	Nepal	Vietnam
Fiji	Netherlands Antilles	Virgin Islands (UK)
French Polynesia	New Caledonia	Wallis & Futuna
Gabon	Nicaragua	Western Samoa
Gambia	Niger	Yemen
Georgia	Nigeria	Yugoslavia, Fed. Rep.
Ghana	Niue	Zaire
Gibraltar	Northern Marianas	Zambia
Grenada	Oman	Zimbabwe

Note: Eurostat figures do not include figures for Cook Islands, Niue, St. Kitts-Nevis, Timor and Tokelau

Countries falling under the groups mentioned in Section 1.2 of the EU Strategic Marketing Guide 'Honey and beeswax'.

LDC, Andes group and Central American Common Market

Afghanistan, Angola, Bangladesh, Burkina Faso, Burundi, Benin, Bhutan, Congo, Central African Republic, Cape Verde, Djibouti, Eritrea, Ethiopia, Gambia, Guinea, Equatorial Guinea, Guinea-Bissau, Haiti, Cambodia, Kiribati, Comoros (excl. Mayotte), Laos, Liberia, Lesotho, Madagascar, Mali, Myanmar, Mauritania, Maldives, Malawi, Mozambique, Niger, Nepal, Rwanda, Salomon Islands, Sudan, Sierra Leone, Somalia, Sao Tomé & Príncipe, Chad, Togo, Tuvalu, Tanzania, Uganda, Vanuatu, Samoa, Yemen, Zambia.

SPGE

Bolivia, Colombia, Costa Rica, Ecuador, Guatemala, Honduras, Nicaragua, Panama, Peru, El Salvador, Venezuela

SPGI

United Arab Emirates, Antigua and Barbuda, Anguilla, Armenia, Netherlands Antilles, Antarctica, Argentina, American-Samoa, Aruba, Azerbaijan, Barbados, Bahrain, Bermuda, Brunei, Brazil, Bahamas, Bouvet Island, Botswana, Belarus, Belize, Cocos Islands, Congo (Republic), Ivory Coast, Cook Islands, Chile, Cameroon, China, Cuba, Christmas Island, Cyprus, Dominica, Dominican Republic, Algeria, Egypt, Fiji, Falkland Islands, Micronesia, Gabon, Grenada, Georgia, Ghana, Gibraltar, Greenland, South Georgia and the South Sandwich Islands, Guam, Guyana, Heard and McDonald Islands, Indonesia, India, British Oceania, Iraq, Iran, Jamaica, Jordan, Kenya, Kyrgyz Republic, St. Kitts-Nevis, Kuwait, Cayman Islands, Kazakhstan, Lebanon, St. Lucia, Sri Lanka, Libya, Morocco, Moldavia, Marshall Islands, Mongolia, Macao, Montserrat, Mauritius, Mexico, Malaysia, Namibia, New Caledonia, Norfolk, Nigeria, Nauru, Niue Island, Oman, French Polynesia, Papua-New-Guinea, Philippines, Pakistan, St Pierre and Miquelon, Pitcairn, Palau, Paraguay, Qatar, Russia, Saudi-Arabia, Seychelles, St Helena, Senegal, Surinam, Syria, Swaziland, Turks & Caicos Islands, French Southern Areas, Thailand, Tajikistan, Tokelau Islands, Turkmenistan, Tunisia, Tonga, Trinidad and Tobago, Ukraine, Uruguay, Uzbekistan, St Vincent (VC), British Virgin Islands, Virgin Islands (USA), Vietnam (VN), Wallis and Futuna Islands, Republic of South Africa, Zimbabwe

APPENDIX 10 IMPORTERS IN EU COUNTRIES

THE NETHERLANDS

HONEY

Imkerij De Traay BV

Address: Platinastraat 50,
8211 AR Lelystad
Telephone: + 31 (0) 320 28 29 28
Fax: + 31 (0) 320 28 20 28
E-mail: info@detraay.com

Fair Trade Organisation

Address: P.O.Box 115,
4100 AC Culemborg
Telephone: + 31 (0) 345 54 51 51
Fax: + 31 (0) 345 52 14 23
E-mail: post@fairtrade.nl
Internet: www.fairtrade.nl

Handelsonderneming A.A. Wagemans BV

Address: Napoleonbaan Noord 135,
6163 VM Geleen
Telephone: + 31 (0) 46 474 93 43
Fax: + 31 (0) 46 475 32 75

Pijlstra B.V.

Address: Leeuwenhoeweg 4-6,
2661 CZ Bergschenhoek
Telephone: + 31 (0) 10 524 39 45
Fax: + 31 (0) 10 521 98 86

BEESWAX

Fasting + Co BV

Address: P.O. Box 226,
2501 CE The Hague
Telephone: + 31 (0) 70 364 69 11
Fax: + 31 (0) 70 365 98 22
E-mail: info@fasting.nl
Internet: www.fasting.nl

Helichem B.V.

Address: P.O. Box 4006,
5950 AA Belfeld
Telephone: + 31 (0) 77 359 09 99
Fax: + 31 (0) 77 359 09 98
E-mail: info@helichem.nl
Internet: www.helichem.nl

Paramelt BV

Address: P.O.Box 86,
1700 AB Heerhugowaard
Telephone: + 31 (0) 72 575 06 00
Fax: + 31 (0) 72 575 06 99
E-mail: info@paramelt.com
Internet: www.paramelt.com

Dipam C.V.

Address: van Rijckevorselstraat 4A,
3972 ER Driebergen
Telephone: + 31 (0) 343 51 44 82
Fax: + 31 (0) 343 51 41 44
E-mail: info@dipam.nl
Internet: www.dipam.nl

Nedres Chemische Industrie B.V.

Address: Zuivelweg 1, 7251 LJ Vorden
Telephone: + 31 (0) 575 55 66 98
Fax: + 31 (0) 575 55 64

GERMANY

Bienenwirtschaft Meissen GmbH

Address: Jaegerstrasse 2,
01662 Meien
Telephone: + 49 (0) 3521 461 60
Fax: + 49 (0) 3521 46 16 20

Carl Stratz GmbH & Co

Address: Zum Brook 5-9,
24143 Kiel
Telephone: + 49 (0) 431 705 90
Fax: + 49 (0) 431 705 91 71

Handelskontor Willmann fuer Naturprodukte GmbH

Address: Tafingerstrasse 18,
71665 Vaihingen
Telephone: + 49 (0) 7042 95 70
Fax: + 49 (0) 7042 95 71 29

Honig Reinmuth GmbH & Co

Address: Imkerweg 2,
74821 Mosbach
Telephone: + 49 (0) 6267 201
Fax: + 49 (0) 6267 62 26

Reformwaren-Vertriebs GmbH

Address: Gruitenerstrasse 200,
42327 Wuppertal
Telephone: + 49 (0) 202 73 10 73
Fax: + 49 (0) 202 73 39 23

Tuchel & Sohn GmbH

Address: Hermann-Buck-Weg 6,
22309 Hamburg
Telephone: + 49 (0) 40 639 00 74
Fax: + 49 (0) 40 639 00 77

UNITED KINGDOM**BHC (Honey Suppliers) Ltd.**

Address: Unit 3, Ffrwdgrech Industrial Estate,
Brecon, Powys, LD3 8LA
Telephone: + 44 (0) 1874 62 23 35
Fax: + 44 (0) 1874 62 31 41
E-mail: info@bhchoneysuppliers.co.uk

Cotswold Specialty Foods Ltd.

Address: Avenue Three, Station Lane,
Witney OX8 6HZ
Telephone: + 44 (0) 1491 82 61 83
Fax: + 44 (0) 1491 82 61 83
E-mail: laurie@cotswoldhoney.co.uk
Internet: www.cotswoldhoney.co.uk

Fuerst Day Lawson Honey Ltd.

Address: Devon House, 58-60 St. Katharine's Way,
London E1 9LB
Telephone: + 44 (0) 20 7488 07 77
Fax: + 44 (0) 20 7702 07 77
E-mail: fdlgroup@fdl.co.uk
Internet: www.fdl.co.uk

Kimpton Brothers Ltd.

Address: 10-14 Hewett street,
London EC2A 33RL
Telephone: + 44 (0) 20 7247 20 72
Fax: + 44 (0) 20 7247 27 84
E-mail: thomas.heck@kimpton.co.uk
Internet: www.kimpton.co.uk

Netra Agro (UK) Ltd.

Address: 4th Floor, Maple House, Potters Bar,
Hertfordshire EN6 5BS
Telephone: + 44 (0) 1771 820 030
Fax: + 44 (0) 1707 820 029
E-mail: olivet@wxs.nl

Landauer Honey Ltd.

Address: Top Barn, Nenton,
Cambridge CB2 5PG
Telephone: + 44 (0) 1223 872 444
Fax: + 44 (0) 1223 872 512
E-mail: landauer_AG@compuserve.com
Internet: www.landauergroup.co.uk

Rowse Honey Ltd.

Address: Moreton Ave., Wallingford,
Oxfordshire OX10 9DE
Telephone: + 44 (0) 1491 82 74 00
Fax: + 44 (0) 1491 82 74 34
E-mail: rowse.honey@rowsehoney.co.uk
Internet: www.rowsehoney.co.uk

BELGIUM**Weyn's Honingbedrijf NV**

Address: Gentseweg 323,
9120 Beveren
Telephone: + 32 (0) 3 775 97 65
Fax: + 32 (0) 3 755 19 26

Bijenhof B.V.B.A.

Address: Moravie 30,
8501 Kortrijk
Telephone: + 32 (0) 56 35 33 67
Fax: + 32 (0) 56 37 17 77

Vergers-Ruchers Mosans S.P.R.L.

Address: Chaussee Romaine 109,
5500 Dinant
Telephone: + 32 (0) 82 22 24 19
Fax: + 32 (0) 82 22 60 21

Euromiel S.P.R.L.

Address: Rue de la Station 15,
4180 Hamoir
Telephone: + 32 (0) 86 38 86 93
Fax: + 32 (0) 86 38 92 87

FRANCE**Max Menthon S.A.R.L.**

Address: 36/38 Rue du Commerce,
74200 Thonon les Bains
Telephone: + 33 (0) 4 50 70 23 22
Fax: + 33 (0) 4 50 70 21 19
E-mail: menthon@wanadoo.fr

Apichis S.A.

Address: B.P. 141,
21004 Dijon Cedex
Telephone: + 33 (0) 3 80 41 01 86
Fax: + 33 (0) 3 80 45 23 66
E-mail: apidis@aol.com

Probabio S.A.R.L.

Address: Bd. d' Avignon,
84170 Monteux
Telephone: + 33 (0) 4 90 61 09 88
Fax: + 33 (0) 4 90 61 09 89
E-mail: probabio@wanadoo.fr

Ville R S.A.

Address: Ave de la Gare,
38430 Moirans
Telephone: + 33 (0) 476 35 42 06
Fax: + 33 (0) 476 35 44 77

ITALY**Ambrosoli G.B. Spa**

Address: 12 Via Giovan Battista Ambrosoli,
22027 Ronago (CO)
Telephone: + 39 0313 507 211
Fax: + 39 0313 980 409

Apicoltura Piana S.R.L.

Address: 1450 Via Piana,
40024 Castel San Pietro Terme (BO)
Telephone: + 39 051 941 205
Fax: + 39 051 944 652

Apicoltura Vangelisti S.R.L.

Address: 82 Via Roma,
52017 Stia (AR)
Telephone: + 39 0575 504 504
Fax: + 39 0575 583 664

Centro Distribuzione Alimentari SRL

Address: Contrada S. Benedetto,
92026 Favara (AG)
Telephone: + 39 0922 441 481
Fax: + 39 0922 441 472

Valby Berti & Yeullaz SNC

Address: Localita Prarayer 2,
11020 Saint-Marcel (AO)
Telephone: + 39 0165 768 929
Fax: + 39 0165 768 069

APPENDIX 11 USEFUL INTERNET SITES

www.apiculture.com

Virtual beekeeping gallery. Very extensive website covering a wide range of aspects like organizations, data bases, journals, books, events, markets, etc.

www.apiservices.com/aea

Website of the European Association of Apitherapy

www.apitherapie.de

Website of the German Apitherapy Society

http://freespace.virgin.net/peter.pebadale/pages/UK_Api_Society.htm

Website of the UK Apitherapy Society

www.beehoo.com

World's beekeeping directory

www.iheo.org

Website of the International Honey Exporters Organization.

www.fao.org

On-line FAO databases (statistical, textual and graphical).

www.europa.eu.int

This site provides information about the European Union and gives links to many organisations working within the EU

www.agr-net.com

Leading information service reporting on European and international agricultural policy, agribusiness and food industry.

www.tscentral.com

Overview of international trade fairs worldwide

www.expobase.com

Website of international trade fairs

http://europa.eu.int.

EU and links to Eurostat. Macro data on the EU

http://mkaccdb.eu.int

Database of European Commission on import regulations, duties and trade barriers.

CBI puts you in touch with the markets of Europe

CBI, the Centre for the Promotion of Imports from developing countries, is an agency of the Netherlands Ministry of Foreign Affairs. Since its establishment in 1971, CBI operates within the policy framework set by the Minister for Development Co-operation. Its mission is to contribute to the economic independence of developing countries. To fulfil this mission, CBI aims at strengthening the competitiveness of companies in those countries on international markets, primarily the West-European market, by improving conditions in enterprises and business support organisations. CBI considers social values and compliance with the most relevant environmental requirements to be an integral part of its policy and activities

CBI offers various programmes and services to its target groups:

Market information

- CBI News Bulletin (6 times annually);
- CBI guide "Exporting to the European Union";
- Market surveys and strategic marketing guides covering the EU including The Netherlands;
- Manuals on subjects such as, trade fair participation, Fashion Forecast etc.;
- CBI's extensive Web site at www.cbi.nl providing general information about CBI, details about CBI programmes, CBI publications (downloadable free-of-charge) and the AccessGuide database on European non-tariff trade barriers;
- CBI's Trade Documentation Centre offering demand-related information such as market information, trade magazines, address books of European companies etc.

Matching services

CBI's computerized exporters' and importers' databases, containing regularly updated company profiles, are instrumental in providing buyers and suppliers with relevant company data on potential trade partners.

Export development programmes (EDP)

Step-by-step approach providing intensive assistance to selected exporters in developing countries in order to obtain a firm and lasting position on the EU market. Made to measure, demand-driven and flexibility are combined with fixed elements such as:

- pre-selection of candidates based on written documentation;
- technical assistance during company visits and distance guidance by CBI branch experts;
- export marketing training (for instance through the EXPRO seminars);
- market entry (for instance via participation in European trade fairs);
- market consolidation by way of follow-up support, further technical assistance and/or repeat market entry activities.

Human resources development

- BSO MARKET INTEL: five-day seminar in Rotterdam for relevant middle management staff of BSO's, aiming at supporting BSO's in establishing or improving a Market Information Service (MIS);
- CAPITA: two-week seminar in Rotterdam for specific industry & trade associations. Aims to provide -through their associations- specific industries or sectors in developing countries with tools to engage in business relations with importers and/or manufacturers in the EU;
- BSO-FAME: two-week seminar in Rotterdam for project managers of BSOs focusing on practical knowledge and applicable tools in export promotion to international markets in general and the European market in particular;
- IntFair: two-week seminar in Rotterdam for BSO staff members on the organization of collective participation in European trade fairs;
- Expro: seven-day seminar in Rotterdam on export marketing and management for selected exporters participating in a CBI export promotion programme;
- Workshops in developing countries: 2-4 days for BSOs and/or exporters, focussing on general export marketing and management, a specific product sector or on specific subjects.

Multilateral co-operation

CBI co-operates with the International Trade Centre (ITC/WTO) to globalize trade promotion and with other European import promotion organizations to increase efficiency and effectiveness by combining efforts.

Please write to us in English, the working language of the CBI.

Centre for the Promotion of Imports from developing countries
Centrum tot Bevordering van de Import uit de ontwikkelingslanden

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