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Stichting Onderzoek Multinationale Ondernemingen
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somo

The Consequences of EC92, GATT and developments in Eastern Europe for exports from developing countries.

Product report: Honey

SOMO
Amsterdam, June 1991.

THE CONSEQUENCES OF EC 1992, GATT, AND THE DEVELOPMENTS IN EASTERN EUROPE FOR EXPORTS FROM DEVELOPING COUNTRIES.

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INTRODUCTION

Trading conditions on the European market will change rapidly in the next few years as a consequence of several important developments. First of all there is the process of the realization of the internal market of the European Community (EC). Then there is the final outcome of the GATT-Uruguay round of trade negotiations, which will have its effects on EC trade regimes. Finally a major issue in Europe is the rapid development of closer economic co-operation between the EC and the countries of Eastern Europe.

All of these developments will have serious consequences for suppliers from outside Europe and especially for suppliers from developing countries.

In some cases competition for them will be heavier, and they will have to meet new requirements in order to be successful on the European market. In other respects Europe will offer them new opportunities and more transparency in marketing conditions.

The aim of this report is to make an inventory of the effects of these developments for suppliers of honey from developing countries on the European market.

In Chapter I the general market situation for this product group is briefly sketched. In Chapter II we go further into the consequences of the process of economic unification in the EC. In Chapter III (likely) outcomes of the GATT-Uruguay round are described and in Chapter IV we try to estimate the possible effects of developments in Eastern Europe and of closer co-operation between the EC and these countries.

Finally, in Chapter V we give general conclusions and recommendations for suppliers from developing countries.

CHAPTER I

THE EC MARKET FOR HONEY

This chapter gives some general information on the EC market for honey. In Appendix 1 a survey is included on the Austrian honey market.

I.1 Consumption and market segmentation

The average annual consumption of honey per capita in the EC is 0,7 kg. Consumption differs greatly, however, between EC countries. Per capita consumption in Germany is 1,4 kg. and in Denmark 1,2 kg. In the Netherlands it is only 0,45 kg.
Total consumption was about 220000 tons in 1989.
Germany is the most important EC market for honey with an annual consumption in 1989 of 86000 tons.
See also appendix 2.

The honey market has two major sectors: one is honey for household consumption and the other is honey for industrial use as a natural sweetener of bakery products, sweets etc. While the market share of these two sectors differs somewhat per European country, we can say that on the average 80% of honey consumption goes directly to the consumer while 10% - 20% goes to the industrial user.

Household consumption

Household consumption of honey is still growing. Honey is profiting from increasing European consumer interest in health foods. It is considered healthier than processed beet sugar. European consumers generally prefer the light-coloured honeys to the darker ones. Liquid honey is preferred above crystallised honey.
Honey derived from mixed flowers usually fetches a lower price than honey derived from one type of flower. Mixed-flower honeys have a broader consumer group. Specialty honeys are generally bought only by a small group of 'connoisseurs'.
It is very important to realize that there are significant differences in consumer habits and preferences in the different European countries. In **Belgium** and **Luxembourg** there is a preference for creamed honey, not too hard. In the **UK** about 80% of honey is blended and a large part (50%) consists of creamed or set honey. In **Denmark** there is a preference for light-coloured honey, while there is also a small demand for dark honey. In **France** there is a consumer preference for monoflora honey types such as rape, clover, acacia, fir, pine, lavender, rosemary, thyme and heather.
In **Germany** there is a preference for liquid honey of the monoflora types of rape, clover, - heather, pine and fir.

Industrial use

The second market sector for honey is that of honey for industrial use. Here lower qualities are generally used, especially honey with a low water content but a higher content of HMF. In recent years industry has been using honey increasingly in health and dietary products, promoting it as a natural sweetener.

Another market distinction is **type of honey**.
Monoflora honey is usually higher-priced than polyflora honey. This is especially true for honeys from well-known species of plants like the acacia. Foreign honey sold on the European market is mainly of the polyflora type.
Domestic honey is considered by most European consumers as superior to **imported honey** and therefore fetches a higher price.

I.2 Domestic production

The EC has a very low degree of self-sufficiency in honey, with internal production of only 90000 tons. To satisfy consumer demand about 130000 tons of honey are imported annually. Self-sufficiency also differs greatly between EC countries. It is lowest in the Netherlands (0%), the UK (12%) and Germany (19%).
It is highest in France (75%), Spain (76%) and Greece(93%)

Table 1: domestic production EC 1980-1984 and 1988-1989 (tons)

	1980	1981	1982	1983	1984	1988	1989
Germany:	11000	14000	18400	19000	18000	16000	18000
France:	10063	12500	25000	19000	20126	24000	25000
Italy:	4000	7500	7600	7700	7876	7000	9000
UK:	1214	1500	1500	1500	1500	3000	3000
Spain:						22000	25000
Greece:						13000	12000

I.3 Imports and main suppliers

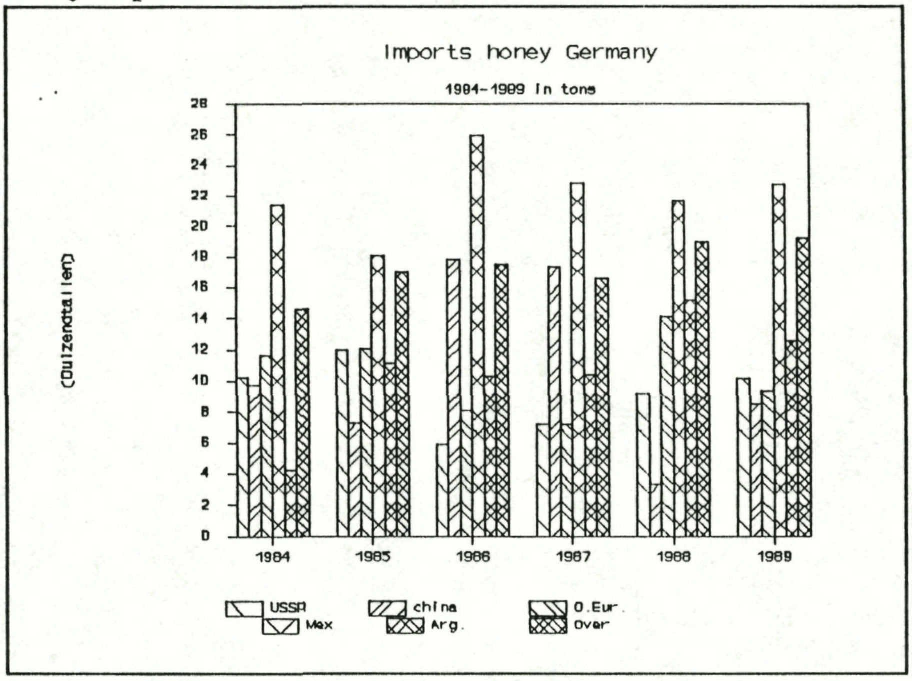
Table: 2 Imports of honey in the EC 1988 and 1989 (tons)

	1988		1989	
	volume	value	volume	value
Yugoslavia	1236	1660	621	1024
Turkey	1322	2482	1991	3283
Soviet Union	10171	5284	11136	6119
Poland	1790	1475	3446	2598
Czechosl.	2972	4063	3948	4377
Hungary	9188	9205	13725	13202
Romania	3365	3277	3147	2745
Bulgaria	4031	3206	3270	2867
USA	1884	2021	1618	1795
Canada	5397	4899	4605	4457
Mexico	30043	22838	31265	25147
Guatemala	1968	1711	748	748
El Salvador	1830	1292	819	622
Cuba	3085	2151	3164	2170
Chile	1483	1045	1916	1471
Uruguay	4537	2965	2809	2082
Argentina	27615	18789	23791	17549
China	11802	8721	8064	6293
Australia	9361	7243	9589	7499
New Zealand	1447	1932	519	970
TOTAL:				
extra-EC:	136071	107529	131050	107886
dev.countr.:	68562	49556	61996	48217

The main suppliers of the EC in 1989 were Mexico, Argentina, Hungary, the USSR and China. These countries are also world leading producers and exporters of honey. See also Appendix 3.

By far the most important EC market for honey is Germany (1989 extra-EC imports: 81594 tons), followed by the UK (20475 tons) and Italy (8152 tons).

Figure 1: Honey imports on the German market 1984-1989.



The average import prices for honey on the German market decreased from DM2455 per ton in 1984 to DM1748 per ton in 1988. In 1989 prices recovered a little to DM1776 per ton.
DM prices are, however, very dependent on the exchange rate between the DM and the dollar as honey is traded in dollars.

As we can see from the above figure, over the period reviewed there have been large changes in the volumes supplied to the German market from different countries.
Imports from **Argentina** rose from 4256 tons to 12557 tons.
Most honey from Argentina was in the 'extra light amber' and 'light amber' classes. 1989 prices were from $840 to $920.

Mexico maintained a dominant position on the German market with volumes of about 22000 tons.

Imports of honey from the **USSR** recovered during recent years from a depression in the middle of the 1980s. Imports of honey from the USSR were mainly through barter trade which makes the competitive position of Russian honey unclear.

Amongst the **Eastern European countries** Poland doubled its exports to Germany from 1988 levels. Imports from Czechoslovakia also rose in 1988 - 1989. Here again, most was

handled as barter trade.
Hungary is a very important supplier from this group of countries with 8500 tons of honey exports in 1989. There were, however, some qualitative problems with the Acacia honey from Hungary. Average prices for this honey were between DM3 and DM3,40 per kg. net in transit.

Imports from **China** decreased during the reviewed period, not so much as a consequence of changing preferences of German traders
but more due to the fact that China found other markets which were more attractive.

The position of different suppliers on the European market is very much dependent on the harvest quality, so it can change considerably from year to year.
Another aspect that determines supply on the European market is whether the foreign producer is able to obtain a higher price on his home market. This is, for instance, the reason why there is not much African honey on the European market (in combination with the high transport costs from most African countries to the EC).

I.4 EC import regime

There is no market regulation for honey within the framework of the Common Agricultural Policy (CAP) because the EC's self-sufficiency in honey is very low.
This means that in principle there are no import restrictions other than normal import tariffs - which are nevertheless very high.
Normal import duties for honey are 27%. Under the GSP scheme imports of honey from developing countries are subject to a 25% import duty. The preferential rate is obviously only marginal. Exports of honey from ACP and LDC countries only can enter the EC duty-free. The same goes for Turkey, within the framework of its association treaty with the EC.

Only France applies further quantitative restrictions on honey imports. Annual imports are limited by quota allocated to different groups of countries.
Import quota for honey in France:

table honey:

Bulgaria:	110 tons
Hungary:	850 tons
Poland:	75,5tons
Czechosl.	55 tons
Romania:	290 tons
China:	230 tons

Industrial honey:

China:	780 tons
Other countr.:	1100 tons

Quota have not been enlarged in recent years.
As a result of these import quota there is a practice amongst traders to import honey into other member states of the EC and then to re-export it to France .

I.5 Prices and margins

World market prices for honey varied in April 1991 from $1000 to $1400 depending on quality, origin and C&F prices.
The market for honey has become more price-competitive in the last decade. At the retail level big suppliers have offered cheap blends of honey and thereby depressing prices. Margins for exporters, importers and packers are all very tight.
There is no comparable reliable information on margins at the EC level.

I.6 Distribution channels

The main trading channels are the specialized importers.
The trading network differs greatly depending on the volume of the market. In Germany there are many importers, in the Netherlands there are only a few left.
Most honey imported into the EC is not refined. Further processing of the honey is done by the packer.
Compared to the average food product the retail outlets of specialist shops, drugstores and health food shops is relatively important for honey sales. However, supermarkets are also important as a retail channel, specifically for the cheaper, blended honeys.

While honey has only a modest position in supermarket sales this position is not threatened. Supermarkets have enlarged their assortment of honey. Apart from the brand-name honeys of the market leaders in the different markets, like Mellona in the Netherlands and Dr. Oetker in Germany, supermarkets like AHOLD and ALDI have developed their own private-label honeys.
The drugstores, specialist shops and health food shops have also developed their own private-label honeys, produced by the blenders and packers.

I.7 Implications for suppliers from developing countries

Upgraded quality, product adaptation and quality control will be asked of exporters of honey from developing countries in order to meet consumer and industrial demands in the 1990s. Since honey can be badly affected by heat, transportation and stocking time in the producing country (which usually has a warmer climate than Europe) should be reduced to a minimum. Honey should preferably be forwarded as soon as possible after the harvest. Honey is now imported in bulk into the EC. The export of prepacked honey is in most cases not an economically viable option for most exporters. The reason for this is that transportation costs of the final product are much higher and furthermore import tariffs have to be paid on the CIF-value which includes the packaging and wage costs associated with packaging the final product.
If exporters want to export a final product, they are advised to make careful cost calculations.
Another aspect that makes it very difficult for exporters to market a final product is that consumer preferences differ greatly in each European country. Honey exporters from developing countries should therefore carefully adjust their product-mix to the market for

which the product is designed.
It is better to market the honey under the name of the country of origin than to market it only as 'foreign honey'. Preferably the exact region from which the honey comes must be indicated. For example, the indication: 'Honey from the mountains and forests of Chiapas (Mexico)' is better than simply 'Honey from Mexico'. It is always advisable to give a more exact indication of the type of honey, for example 'forest honey'. The customer can build up a better identification with a blossom or a region than with only an abstract country name where the types of honey generally differ a lot.

Finally it will be very difficult for exporters to market a final product on the European market because they will be confronted with tendencies toward centralization both in the supermarket retail channel and that of the specialist shops.
Both retail outlets are increasingly centralizing their buying operations, making it very difficult for foreign suppliers to win a market position between brand names and private labels.
The conclusion must therefore be that marketing honey as a final product by exporters to the European market is very difficult and will succeed only if meticulously planned and analyzed on all the major aspects mentioned here.

CHAPTER II

THE CONSEQUENCES OF THE REALIZATION OF THE EC INTERNAL MARKET.

II.1 Import regime

The process of the realization of the EC internal market will not in itself lead to major changes in the EC import regime for honey.
European farmers organized in the COPA have tried several times to persuade the EC to introduce a market organization for honey containing all the familiar elements including internal support prices combined with further protection against imports. The EC however has not followed this policy line because of the low degree of EC honey self-sufficiency.
What is bound to disappear after 1992 are the remaining national import restrictions applied by France. It may, however, take several years before this happens. In the meantime, as we saw in Chapter I, these restrictions are already partly avoided by the trade by re-exporting honey from other EC states to France.
The European market will nevertheless remain heavily protected by the very high import tariffs for honey.

II.2 Standards and product regulations

Other current trade restrictions are phyto-sanitary regulations and national food legislation on honey.
As far as phyto-sanitary regulations are concerned, these do not cause major problems at the moment and are not expected to do so in the future.
The EC has set a standard for honey in the regulation 74/009/EEC
(For text see Appendix 4) which gives technical specifications for honey. All imported honey has to meet this standard.

Apart from this regulation, which has already existed for some time, there are some new regulations in preparation as part of the 'EC 1992' process which are also relevant for honey, especially when exported as a final consumer product to the EC.

Regulation on biologically-grown products

This proposal sets specifications for 'biologically grown' and leaves certification to national institutes. Imported products can only obtain the qualification if a certifying institute exists in the country of origin which is recognised by the EC. There is much negotiating going on at the moment between the EC, European industry and the IFOAM, the international federation of organic producers. European industry wants a really reliable regulation and certification scheme. Certification in Europe should therefore only be done by reliable private institutions such as EKO/SKAL in the Netherlands and Naturland in Germany. The IFOAM could guarantee certifiers from countries outside the EC. This whole issue will take several years to be elaborated.

Regulation on product labelling

This regulation gives minimum requirements on information to be given to the consumer on the label of a product (weight, ingredients, producer etc.)
The basic regulation is 79/112/EEC, adapted in 1989.

Regulations on food product packaging and packaging materials
The basic regulation is 80/323/EEC, addition 86/96/EEC and 89/109/EEC.
There will soon be a separate regulation on different packaging materials like plastics, metals, glass and so on.

Regulation on packaging and standard quantities

This regulation is still in discussion. It proposes to give standard quantities for food packagings from 5 g. to 10 kg. Those standard quantities are: 75, 125, 250, 375, 500, 750, 1000, 1600, 2000, 3000, 4000, 5000 and 10000 g.
Some member states, however, have traditionally employed other quantities.
The present phase of the discussion is that the EC will make a framework regulation on food packaging for all products and that specific regulations will be made for import product groups. The most probable outcome will be that the EC will give standard quantities which some member states will adopt. If other member states would like to have deviating standard quantities they will be allowed to do so, but other member states will be free to refuse these quantities if imported. It will be a few more years before a definite regulation on packaging exists.

Regulation on 'lot identification'

This regulation proposal aims at identifying the production series of all kinds of goods. This is necessary in order to be able to recall, as quickly as possible, certain product series if they cause severe health risks.

II.3 Product liability

Another aspect of the realization of the internal market are the new rules on **product liability**. This regulation, adopted in 1988, makes it possible for consumers to charge either **producer** or **traders** for damage caused by defaults in their products, if the damage exceeds 500 ECU. If a product originates from outside the EC the importer can be sued.
The Commission regulation gives individual member states the possibility of excluding the farmers who delivered the raw material for the final food product from liability. This clause has so far been introduced in Germany, the UK and Greece. It is under consideration in Spain and Portugal.

II.4 Harmonization of taxes

This is one of the most sensitive subjects of the whole 'EC 1992' process. It concerns harmonization of Value Added Taxes and excise duties.
VAT rates differ greatly between EC countries.
In a recent compromise, EC member states agreed on a minimum VAT rate of 5% for the low-tariff group and of 15% for the high-tariff group. Harmonization of VAT does not discriminate against suppliers from countries outside the EC because it is applied both to domestic products and to imported products.

CHAPTER III

RESULTS OF THE GATT-URUGUAY ROUND

Honey is considered by the EC as a competitive agricultural product. This is why honey is part of the negotiations in the group on 'agricultural products' although honey is of course not the major problem product here compared to dairy products, grains, sugar and so on. The outcomes of these negotiations are difficult to predict at the moment, because the final EC offer will be made largely on the basis of the current internal discussions to revise the EC CAP system. We expect, however, that the most likely result will be that the EC will not change its present import regime on honey.

CHAPTER IV

CONSEQUENCES OF THE DEVELOPMENTS IN EASTERN EUROPE

As we saw in Chapter I, Eastern Europe has traditionally been an important supplier of honey to the Western European market.
The USSR is in quantity terms the most important supplier, but Hungary, Romania, Bulgaria and Czechoslovakia are also traditional suppliers and well known for the quality of their products, especially acacia honey.

What will now be the consequences of the recent changes that have taken place in these countries?
In the old situation, most of the honey from Eastern Europe was exported by state co-operatives driven by the need to obtain foreign exchange.
Now that markets have been liberalized in these countries, it is expected that most of the honey will stay on the domestic market because producers can obtain higher prices there than when exporting to the EC.
Even if the EC enters into an association agreement with the Eastern European countries and even if these agreements led to liberalization of honey imports from these countries into the EC it is quite possible that exports to the EC will be much lower because their domestic market prices are higher than export prices to the EC.

CHAPTER V

CONCLUSIONS AND RECOMMENDATIONS.

The EC market for honey is still growing. The major market is Germany.
Upgrading quality, product adaptation and quality control will be asked of exporters of honey from developing countries if consumer and industrial demands are to be met in the 1990s.
Since honey can be seriously affected by heat, transportation times should be reduced to a minimum.
Exports of bulk honey offer good prospects but exports of final consumer product are in most cases not economically viable because of high transportation costs, high import tariffs and difficulties in marketing the final product.
The process of the realization of the internal EC market will not have great consequences for exporters from developing countries. Some national restrictions will disappear but the heavy protection of high import duties will remain.
In the case of exports of final consumer products, the exporter will have to meet the specific demands set by new EC legislation on food products. The present Uruguay-round of GATT negotiations will not bring major changes for the honey market.
Developments in Eastern Europe will not seriously affect the position of suppliers from developing countries on the EC market. While EC import barriers against honey imports from Eastern Europe may disappear in the next five years, it is expected that most of the honey which was traditionally exported from these countries will now stay on the domestic market because of higher prices there.

USEFUL SOURCES OF INFORMATION:

CBI
P.O. Box 30009
3001 DA Rotterdam
The Netherlands
Market Survey: Honey and Beeswax,
A survey on the Netherlands and other major
markets in the European Community.
1990.

ITC
Palais des Nations
1211 Geneva 10
Switzerland
Market survey: Honey, A study of
major markets, Geneva 1987.

Bundesverband des Deutschen Importhandels mit Konserven, Tiefkuhlprodukten, Trockenfruchten, Schalenobst, Trockengemuse, Gewurzen, Honig und verwandten Waren. (Waren-Verein der Hamburger Börse e.V.) Plan 5, 2000 Hamburg 1, Germany.

THE AUSTRIAN HONEY MARKET

I.1 Consumption and marketsegmentation:

Per capita consumption is about 1,4 kg every year. Total consumption is about 10.000 tons every year.

The domestic honey is widely preferred to the imported honey and has a quite higher price, even more than the double of imported honey. Anyhow, it doesn´t meet any problem in the market because of its good taste, since a lot of it is dark forest honey. Dark honey beeing considered in Austria as being of good quality. Nevertheless most of the imported honey is of the colour "amber" and "light amber".

Monoflore honeys are increasing their market as in Austria the alternative plantations of soja etc. are getting a bigger importance.

I.2. Domestic production

Beginning with 1980 the domestic production has almost doubled to about 5000 to in 1987. The degree of selfsufficency is about 50 %. Production and degree of selfsufficency depend a lot on the weather conditions. In the case of cold or to dry weather the local production is affected and provoques a smaller harvest.

In this case the part of the imported honey is increasing since the Austrian customer changes from local honey to a foreign product as domestic consumption remeins quite stable. EZA made this experience in the last years.

I.3. Imports and main suppliers

Austria is importing from about 20 countries. Before the Tschernobyl desaster the part of honey coming from the Eastern European countries was very high and remains still big. In the years after 1986 the part of honey coming from Latin America has increased its importance. In 1983 the part of the imported honey coming from Eastern Europe was about 94 % of the whole imports, whereas the part of Latin America was about 4 %. In 87, which was a record year of imports the picture changed drastically: Imports from Eastern Europe were about 71 % (the imported quantity from this origins remaining the same) , from Latin America about 22 %. In 87 the quantities and the part of the market for honey from Eastern Europe decreased a lot because of Tschernobyl. in 1990 the Eastern European countries keep about 60 % of the market for imported honey in Austria.

For 1989 and 1990 the quantities, prices and origins were the following

		1989			1990	
Origin	**Quantities in to**	**in %**	**value in ATS in thousand**	**Quantities in to**	**in %**	**value in ATS in thousand**
Yugoslavia	59,2	1,0%	1939	74,5	1,1%	2492
Bulgaria	1146,9	19,9%	13060	255,7	3,9%	2661
Poland	106,3	1,8%	1266	872,1	13,2%	11136
Rumania	225,6	3,9%	3705	43,4	0,7%	756
CSFR	561,6	9,7%	10648	775,4	11,7%	14858
Hungaria	1695,5	29,4%	20978	1766,6	26,8%	21622
USSR	357	6,2%	3646	239,3	3,6%	2339
EASTERN EUROPE	**4152,1**	**72,1%**	**55242**	4027	61,0%	55864
Germany	164,3	2,9%	3002	181,5	2,7%	3186
France	31,9	0,6%	680	26,2	0,4%	530
Others	30,1	0,5%	675	44,5	0,7%	883
EC	**226,3**	**3,9%**	**4357**	252,2	3,8%	4599
Argentina				158,6	2,4%	185,8
Guatemala	45,2	0,8%	811	22	0,3%	400
Mexico	209,3	3,6%	2991	1413,9	21,4%	16143
Cuba	544,5	9,5%	5558	452,4	6,9%	4620
LATIN AMERICA	**799**	**13,9%**	**9360**	2046,9	31,0%	21349
Turkey				8,9	0,1%	555
Canada	54,6	0,9%	828	0		0
China	310,6	5,4%	3241	0		0
Hongkong	75,1	1,3%	1157	22,3	0,3%	613
New Zealand	117,5	2,0%	2537	130,6	2,0%	2562
OTHERS	**557,8**	**9,7%**	**7763**	161,8	2,5%	3730
TOTAL	**5761,2**	**100,0%**		6602,8	100,0%	
Including some small purchasers		Increase in %		14,6%		

Imports of Eastern Europe are still very important and remained on the same level concerning the quantities. For the near future it is very hard to forcast the development. I think local consumption in these countries will increase and the barter trade with honey will diminuish. Anyhow the former socialist countries will have problems in reforming their agricultural sector. This may affect honey production. Another point is that these countries will have a bigger need of foreign currency than ever before and therefore will have to export goods.

Austrian importregime

There is in real terms no market regulation for honey in Austria. The ministry of agriculture has the right to allow the imports. Depending on the countries of origin this right is passed to the the customs authorities so there is no limitation.

Besides the normal import tariffs there are some small formal procedures to accomplish for countries like Guatemala, China and all the Eastern European countries. In these cases the importer has to indicate the import price of the honey and is forced to garanty paying this price. By this way the ministry of agriculture wants to have the control over the price of import honey in order to give some information to local producers.

The general duty for honey in packings below 25 kg is ATS 500,-/100 kg

The preferance duty for honey in packings below 25 kg is ATS 450,-/100 kg

The general duty for honey in packings with more than 25 kg is ATS 260,-/100 kg (This is the case for the honey imported in barrels)

I. 5 Distribution channels

85 to 90 % of the local production is sold directly from the producer to the consumer without any intermediate trade. Only 10 to 15 % of the local production is sold to retailers.

This part and all the imported honey are sold by supermarkets, bio-shops, health shops etc.

Nearly all the honey is sold in glasses; tins and other packings are not welcome. The customer wants to see the product. Small plastic packings for breakfeast are increasing their market in the catering business. The packing sizes of honey are 500 grms (about 25 % of the whole sales) and 1 kg (about 70 % of the whole sales).

I.6 Implications for suppliers from developing countries

The tendencies for the honeymarket of Austria for the next 10 years might be the following:

* A diversification of the types of honey. In former days there was only made a distinction between blossom honey and forest honey. Today the market is looking for diversification regarding the blossoms, taste and plants of the honey. The customer will look for a special type of honey, not only for honey.

* Creamy honey will get a bigger market share. The demand for this product introduced some 5 years ago is steadily increasing.

* The packing sizes will become smaller because of the increasing part of one person households.

* Honey will replace sugar for beverages like tea due to the health consciousness of the customers.

* Quality of the product will play a bigger role in the future especially the issue of health, pesticides etc. will become very important, the importance of the price for a good product will decrease. Low prices are considered as a fact of bad quality.

* An increasing environmental movement will push the consumption of natural food. Honey will profit of this tendency.

* The packing material has to respect the environmental movement too. Glass which can fully be recycled is the only possibility.

HONEY IS A PRODUCT WITH A BIG FUTURE!!

4.21.4.1. **Supply balance — honey**

	EUR 12	BLEU/UEBL	Danmark	BR Deutschland	Ellada	España	France	Ireland	Italia	Nederland	Portugal	United Kingdom
1	2	3	4	5	6	7	8	9	10	11	12	13
1987/88												
Usable production (1 000 t)	89	1	3	16	13	22	24	0**	7	0	3	3
Imports	138	5	4	82	2	9	9	1	9	10	1	23
Exports	7	1	2	14	0	2	2	0	0	2	0*	1
Intra-Community trade	17	1	2*	1	1	0	5*	0	2	4	0	1
Internal use: — human consumption	212**	5	5	84	14	29	31**	1	16	8*	4**	25
Human consumption (kg/head/year)	0,7*	0,5	1,0	1.4	1,4	0,7	0,6**	0,3	0,3	0,5*	0,4**	0.4
Self-sufficiency (%)	42,0	20,0	60,0	19.0	92,9	75,9	75,0**	0.0	43,7	0,0*	75,0**	12,0
1988/89												
Usable production (1 000 t)	9,0	1	5	18	12	25	25**	0	9	0	3	3
Imports	:	6	4	86	2	9	9*	1	10	10*	1	24
Exports	:	2	2	17	0	2	3*	0	0	2	0	1
Intra-Community trade	20*	2	2*	2	1	0*	5*	0*	2	4*	0	2
Internal use: — human consumption	22,0	5	5	87	13	29*	29,2	1*	18	8*	4*	25
Human consumption (kg/head/year)	0,6	0,5	1,0	1,4	1,3	0,8*	0,5	0,3*	0,3	0,5*	0,4*	0,4
Self-sufficiency (%)	41,0	20,0	62,7	20,7	92,3	82*	80,0*	:	50,0*	:	75,0*	12,0

Source: Eurostat and EC Commission, Directorate-General for Agriculture.

TABLE
TABLEAU
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	HEN EGGS / OEUFS DE POULE / HUEVOS DE GALLINA — PRODUCTION MT				EGGS EXCL HEN / OEUFS EXC OEUFS DE POULE / HUEVOS EXC HUEV GALLINA — PRODUCTION MT				HONEY / MIEL / MIEL — PRODUCCION MT			
	1979-81	1987	1988	1989	1979-81	1987	1988	1989	1979-81	1987	1988	1989
WORLD	26737360	33869360	34978048	34714112	507054	620539	625530	634847	897410	1141352	1098467	1108776
AFRICA	922383	1381958	1420137	1470246	6660	8417	8632	9027	87501	103480	104543	107041
ALGERIA	20217	143750*	154000	165000					1523	1760F	1840F	1920F
ANGOLA	3650	3900F	3900F	3900F					15000	15000F	15000F	15000F
BENIN	7860	17100F	17100F	18000F								
BOTSWANA	627	720F	738F	756F								
BURKINA FASO	7448	14700F	15050F	15050F								
BURUNDI	2356	2945F	3040F	3135F					897	960F	970F	980F
CAMEROON	8400	10800F	11200F	11600F					2217	2600F	2600F	2600F
CAPE VERDE	65	176F	184F	192F								
CENT AFR REP	966	990F	1008F	1026F					6167	7300F	7400F	7600F
CHAD	2850	3240F	3240F	3375F					970	960F	960F	960F
COMOROS	564	616F	616F	624F								
CONGO	825	1088F	1125F	1155F								
COTE DIVOIRE	10253	11500F	11500F	11960F								
EGYPT	78100	153080*	142000*	143000*					7736	12384	12500F	13000F
EQ GUINEA	116	160F	165F	171F								
ETHIOPIA	73140	77970F	78660F	78660F					20500	22200F	22500F	22600F
GABON	1050	1410F	1440F	1500F								
GAMBIA	402	618F	618F	650F								
GHANA	12203	8745F	8480F	8480F								
GUINEA	7420	13860F	13860F	13860F								
GUIN BISSAU	300	540F	540F	552F					300	300F	300F	300F
KENYA	19968	34848F	36432F	38016F					10834	15200	15000F	16000F
LESOTHO	789	812F	812F	826F								
LIBERIA	2336	3744F	3744F	3840F	176	200F	200F	200F				
LIBYA	16233	17050F	17200F	17500F					372	600F	630F	650F
MADAGASCAR	12588	11820F	11880F	11904F	3840	5220F	5400F	5760F	3331	3630F	3660F	3690F
MALAWI	10725	11570F	11700F	11830F								
MALI	6720	12420F	12960F	13500F					310	320F	320F	321F
MAURITANIA	2720	3570F	3740F	3910F								
MAURITIUS	2800	4200F	4200F	4200F								
MOROCCO	72900	84000F	85100F	86200F					4533	3100F	3200F	3200F
MOZAMBIQUE	9400	12700F	12800F	12800F					242	275F	280F	285F
NAMIBIA	150	175F	175F	175F								
NIGER	6800	7990F	8160F	8330F								
NIGERIA	180000	270000F	293000F	307000F								
REUNION	2413	1800F	1900F	1900F					22	58F	58F	60F
RWANDA	860	1100F	1200F	1200F					10	14F	15F	15F
SAO TOME PRN	148	172F	172F	172F								
SENEGAL	6353	10000F	10000F	11000F					170	200F	200F	200F
SEYCHELLES	855	1530F	1530F	1615F	9	12F	12F	12F				
SIERRA LEONE	4669	6325F	6325F	6555F	10	10F	10F	10F	600	600F	600F	600F
SOMALIA	2320	2680F	2720F	2760F								
SOUTH AFRICA	159952	185000F	190000F	198900*					900	900F	900F	900F
SUDAN	31745	41000F	41500F	42000F					600	630F	610F	630F
SWAZILAND	272	300F	304F	307F								
TANZANIA	36021	59566F	61620F	65000F	2625	2975F	3010F	3045F	9500	13000F	13500	14000F
TOGO	1677	3680F	4600F	5060F								
TUNISIA	36383	55000F	57000F	58200F					640	970F	980F	1000F
UGANDA	9533	19000F	18000F	19000F					130	519	520F	530F
ZAIRE	7247	7800F	7800F	7900F								
ZAMBIA	27893	31600F	32400F	33200F								
ZIMBABWE	11100	12600F	12700F	12800F								
N C AMERICA	5421970	5771452	5700173	5478690	490	550	550	550	211129	212899	201928	183548
ANTIGUA-BARB	138	160F	160F	150F								
BAHAMAS	356	460F	460F	460F								
BARBADOS	1489	1830	1524	1600F								
BELIZE	1034	1315	1316F	1316F					239	291	220	250F
BERMUDA	435	580F	580F	580F								
CANADA	330863	323508	324380	310650*					32303	40650	37105	28100
CAYMAN IS	84	87F	87F	87F							14	
COSTA RICA	16760	13900*	14000F	14500F					805	1000F	1000F	1000F
CUBA	99218	108005	104857	105000F					7602	7744	9738	9700F
DOMINICA	255	167F	167F	149F								
DOMINICAN RP	19267	17900	19100	28750*					1300	1682	1498	1500F
EL SALVADOR	36822	42030	42525	24500F					2367	3408*	2940	3100F
GRENADA	975	1000F	1000F	1000F								
GUADELOUPE	814	1366*	1200F	910F					4	4F	4F	4F
GUATEMALA	39947	60480F	60700F	61200F					3124	4186	4150F	4150F
HAITI	2943	4000F	4000F	4000F	490	550F	550F	550F	300	330F	330F	330F
HONDURAS	18947	22600F	23700F	23700F					1402	1260F	1280F	1300F
JAMAICA	15500	17600F	17000F	12000F					1000	1000F	1000F	1000F
MARTINIQUE	1500	865	850F	680F					100	104F	104F	104F
MEXICO	636256	908526	884700*	847200*					65758	47850*	46140*	52530*
MONTSERRAT	42	60F	60F	55F								
NETH ANTILLE	517	400F	400F	400F								
NICARAGUA	28833	31800F	29500F	25500F					100	120F	100F	110F
PANAMA	14553	15500F	15500F	15500F								
PUERTO RICO	21902	17023	17784	15550F					72	128	85	90F
ST KITTS NEV	297	370F	380F	340F								
SAINT LUCIA	497	530F	540F	520F								
ST PIER MIQU		11	14	14F								
ST VINCENT	530	580F	590F	590F								
TRINIDAD TOB	7433	8000F	8000F	8000F					250	275F	280F	280F
USA	4123566	4170600	4124900	3973600					94404	102867	95940	80000
US VIRGIN IS	196	200F	200F	190F								
SOUTH AMERIC	1565626	2211112	2226103	2056980	9149	9740	9940	9950	52375	71190	75671	74338

	HEN EGGS OEUFS DE POULE HUEVOS DE GALLINA PRODUCTION MT				EGGS EXCL HEN OEUFS EXC OEUFS DE POULE HUEVOS EXC HUEV GALLINA PRODUCTION MT				HONEY MIEL MIEL PRODUCCION MT			
	1979-81	1987	1988	1989	1979-81	1987	1988	1989	1979-81	1987	1988	1989
ARGENTINA	253731	292000F	292000F	287000F					34533	40000	40000*	38000*
BOLIVIA	22500	28000F	30000F	31000F					90	90F	90F	90F
BRAZIL	765117	1235147	1191000*	1100000*	8481	9000F	9200F	9200F	6595	14063	16000F	16500F
CHILE	66046	83670	81852	83000F					4667	5000F	5000F	5000F
COLOMBIA	176972	226000	248500*	247300*					2167	4000	4000F	4000F
ECUADOR	43056	45314	44197	42000F					967	1130F	1140F	1200F
FR GUIANA	292	188	200F	200F								
GUYANA	3900	4200F	4200F	4200F					62	72F	72F	72F
PARAGUAY	26025	33000	35500F	37000F	668	740F	740F	750F	1069	1061	1093	1200F
PERU	59700	97200	118200	95800					63	80F	80F	80F
SURINAME	2638	3165*	3180F	3180F					66	74F	76F	76F
URUGUAY	16903	21150*	21500*	21800*					1983	5000F	7500F	7500F
VENEZUELA	128745	142078	155774	104500*					114	620F	620F	620F
ASIA	7576997	12301500	13187603	13513563	341186	427825	431932	438780	198796	319348	277892	298554
AFGHANISTAN	14000	14200F	14200F	14200F					3200	3000F	3000F	3000F
BAHRAIN	3238	3905*	4000F	4500F								
BANGLADESH	39189	47500F	54000F	56000F	30282	55000F	56000F	57000F				
BHUTAN	159	240F	254F	264F								
BRUNEI DARUS	1787	2629F	2773F	3000F								
CAMBODIA	5400	10500F	11500F	12000F	2100	2525F	2550F	2575F				
CHINA	2882415	6079310	6671605F	6800000F	29207	26140	23446	23400	102443	205320	154054*	177000*
CYPRUS	5309	6593	6422	7656					438	530	500	420
GAZA STRIP	2265	3675*	4500*	4500F					100	200*	200F	200F
HONG KONG	2737	2140	2060	1820	1977	1950	1770	1570				
INDIA	682000	952000*	980000*	1072000*					43333	49000F	51000F	50000F
INDONESIA	177767	372000	434000	435000F	67833	28000	90000F	92500F				
IRAN	155333	240000F	250000F	260000F					5567	6100F	6150F	6200F
IRAQ	48362	74100F	61400F	60000F					48	60F	52F	65F
ISRAEL	91675	99000	103800	103600*					2083	2420	2400F	2400F
JAPAN	1998041	2375845	2375845	2408249					5574	6023*	4900	6000*
JORDAN	19000	25500	22800*	24400F					103	72	120	90F
KOREA DPR	103833	135000F	137000F	140000F								
KOREA REP	255786	362000	397000	415000*	1679	1715F	1700F	1700F	5366	8300F	8000F	8500F
KUWAIT	8573	10840	12500F	16000F								
LAOS	22167	29500F	30500F	31500F	274	324F	331F	331F				
LEBANON	41275	53000F	53000F	53000F					277	300F	320F	325F
MACAU	575	620F	630F	635F								
MALAYSIA	121067	175000*	185000*	190000F								
MONGOLIA	983	1490	1612	1750F					290	415F	425F	450F
MYANMAR	31435	48420	51000F	53000F	6568	10187	11000F	11000F	1	6F	6F	6F
NEPAL	14767	13100F	13100F	13100F								
OMAN	710	1600F	1600F	1700F								
PAKISTAN	96367	178600	194600	202100	2600	2600F	2600F	2600F	663	715F	722F	722F
PHILIPPINES	201285	200000F	250000F	270000F	56713	52000F	52500F	53000F				
QATAR	281	1379	1400F	1450F								
SAUDI ARABIA	41967	113941	152075*	152625*						4F	4F	4F
SINGAPORE	26870	16008	11487	16169	1187	596	368	607				
SRI LANKA	28857	46423	48300F	50700F	66	88F	97F	97F				
SYRIA	68759	69300	82500	69750					516	590	800	647
THAILAND	100600	111150F	111175F	111200F	87367	120700F	121550F	122400F	117	1100F	1700F	1700F
TURKEY	217164	304225	340080	341000F					27090	34418	42729	40000F
U A EMIRATES	2533	8200*	8325*	8500*								
VIET NAM	55250	97767*	89760*	91800*	53333	66000F	68000F	70000F	227	400F	425F	450F
YEMEN AR	5520	12500	13500	13000F					295	305F	305F	305F
YEMEN DEM	1700	2300F	2300F	2400F					65	70F	70F	70F
EUROPE	7228362	7371666	7482534	7266833	65413	71437	69556	69620	132752	179574	184926	183196
ALBANIA	9957	13200F	14000F	14500F					623	770F	780F	801F
AUSTRIA	96804	100540	97373	92785*					3133	4833	5500	5000F
BELGIUM-LUX	200655	161000*	156800*	156800F					1000	1000F	1000F	1100F
BULGARIA	131679	158401	153420	150000F	2282	2696	1156	1120F	9334	10463	10553	8645
CZECHOSLOVAK	243327	277216	279823	281378	33800	35300*	32600F	32600F	6043	9573	12321	10000F
DENMARK	77130	76500	79400	81700*								
FINLAND	77967	80800	76700	75000					817	1218	1743	1800F
FRANCE	849667	884000	930800	891000*	1000	1000F	1000F	1000F	12321	24468*	24300F	26000F
GERMAN DR	322587	335100	335000*	333000F					4782	6537	6186	6300F
GERMANY FR	800987	729000	722000	726000*					11633	15814	18200	17000
GREECE	122540	117204	124000*	121000F					10997	11542	11600F	11650F
HUNGARY	250000	235376	254703	236300*	3268	3551	4100*	3500F	13531	15170	14400	16000F
ICELAND	3000	3600F	3700F	3800F								
IRELAND	35000	36000*	34830*	33630*					197	85	100F	100F
ITALY	659163	642812	697368	669000F					4133	9500	8600	8000F
LIECHTENSTEN	250	250F	250F	250F								
MALTA	6256	6600F	6800F	6800F								
NETHERLANDS	540409	655000*	645700*	640200*					300	500	500F	500F
NORWAY	44665	52200	52600	53600F					1020	800	1200	1200F
POLAND	488642	442915	457037	448000*					11889	12965	14067	15000F
PORTUGAL	62008	72804	74000F	75000F					2966	3211	3200F	3200F
ROMANIA	331267	430600	400000F	380000*	19070	23220	25000F	25600F	14279	15285	17000F	17000F
SPAIN	665560	725059	757500	772600	2314	1170	1100F	1100F	12835	22299	21000F	21000F
SWEDEN	113633	123000	124000	128500*					2244	2831	3398	3500F
SWITZERLAND	43186	42499	44000F	44000F					1734	2977	3000F	3100F
UK	834000	723990	712130	611990	3679	4500F	4600F	4700F	1555	1500F	1500F	1500F
YUGOSLAVIA	218030	246000	248600*	240000*					5385	6233	4778	4800F
OCEANIA	262864	244673	247499	247804	15823	16570	16920	16920	28524	35861	31507	32099
AMER SAMOA	34	30F	30F	30F								
AUSTRALIA	197870	188000	187000*	187000*	14300	15000F	15000F	15000F	20923	25300	23026	22619
COOK ISLANDS	95	110F	112F	114F								
FIJI	1976	2145*	2239*	2300F					8	30	38	35F

TABLE
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	HEN EGGS OEUFS DE POULE HUEVOS DE GALLINA				EGGS EXCL HEN OEUFS EXC OEUFS DE POULE HUEVOS EXC HUEV GALLINA				HONEY MIEL MIEL			
	PRODUCTION			MT	PRODUCTION			MT	PRODUCCION			MT
	1979-81	1987	1988	1989	1979-81	1987	1988	1989	1979-81	1987	1988	1989
FR POLYNESIA	923	1330	1340	1400F	88	85F	85F	85F	12	17F	19F	20F
GUAM	1071	400F	400F	400F					7	9F	9F	9F
KIRIBATI	105	120F	120F	122F								
NAURU	8	10F	11F	11F								
NEWCALEDONIA	887	1510	1550F	1560F								
NEW ZEALAND	56855	47000*	50600*	50600F	1413	1450F	1800F	1800F	6965	10091	8000	9000F
NIUE	20	20F	20F	20F					32	20F	20F	20F
PACIFIC IS	147	159F	160F	162F								
PAPUA N GUIN	1815	2640F	2700F	2850F	22	35F	35F	35F				
SAMOA	152	180F	184F	188F					550	360F	360F	360F
SOLOMON IS	284	288F	288F	288F								
TOKELAU	5	4F	4F	4F								
TONGA	348	412F	420F	428F					16	19F	20F	20F
TUVALU	11	15F	16F	16F					2	5	5F	6F
VANUATU	224	256F	260F	264F								
WALLIS ETC	35	44F	46F	47F					10	11F	11F	11F
USSR	3759166	4587000	4714000	4680000	68333	86000F	88000F	90000F	186333	219000	222000F	230000F
DEV.PED M E	12409728	12867811	12945076	12656254	22706	23120	23500	23600	236422	237062	281890	258469
N AMERICA	4454430	4494108	4449280	4284250					126707	143517	133045	108100
W EUROPE	5450910	5478858	5588551	5423655	6993	6670	6700	6800	72270	108811	109619	109450
OCEANIA	254725	235000	237600	237600	15713	16450	16800	16800	27888	35391	31026	31619
OTH DEV.PED	2249668	2659845	2669645	2710749					9557	9343	8200	9300
DEV.PING M E	5743141	8197676	8513513	8489140	272955	351987	357178	362452	311214	348392	364366	368661
AFRICA	636353	985829	1029437	1068846	6660	8417	8632	9027	77893	88966	89903	91861
LAT AMERICA	2532731	3487865	3476402	3250826	9639	10290	10490	10500	136797	140572	144554	149786
NEAR EAST	762069	1156388	1231302	1237181					46406	59263	68000	65606
FAR EAST	1803413	2557330	2765879	2921488	256546	333160	337936	342805	49481	59121	61428	60928
OTH DV.PING	8575	10264	10493	10798	109	120	120	120	636	470	481	480
CENTR PLANND	8584501	12803875	13519460	13568728	211393	245432	244852	248795	349775	495898	452211	481646
ASIAN CPE	3047882	6324067	6911477	7045550	84640	94665	93996	95975	102960	206135	154904	177900
E EUR+USSR	5536624	6479808	6607983	6523178	126753	150767	150856	152820	246815	289763	297307	303746
DEV.PED ALL	17946336	19347616	19553056	19179424	149459	173887	174356	176420	483237	586825	579197	562215
DEV.PING ALL	8791018	14521743	15424990	15534690	357595	446652	451174	458427	414173	554527	519270	546561

TABLE
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NATURAL HONEY 061.6 — MIEL NATUREL 061.6 — MIEL NATURAL 061.6

	IMPORTS IMPORTATIONS IMPORTACION MT			IMPORTS IMPORTATIONS IMPORTACION 1000$			EXPORTS EXPORTATIONS EXPORTACION MT			EXPORTS EXPORTATIONS EXPORTACION 1000$		
	1986	1987	1988	1986	1987	1988	1986	1987	1988	1986	1987	1988
WORLD	286358	263982	256960	297605	293902	271416	309692	270671	261795	316047	295860	279289
AFRICA	192	162	126	443	481	341	192	255	236	373	429	699
BOTSWANA	1*			3								
CAMEROON	7	10	10F	30	50	50F						
CAPE VERDE	2	7	6	6	20	18						
CENT AFR REP		1*			5*							
CONGO	2*	3*	1*	6*	10*	4*						
COTE DIVOIRE	10*	10*	5*	30*	35*	15*						
DJIBOUTI	6*	7*	2*	15*	18*	5*						
EGYPT							50	99	127	166	229	544
GABON	15*	15*	10F	50*	55*	35F						
KENYA	2			2			9	12	1	8	9	1
LIBERIA	6	5*	2*	5	9*	4*						
LIBYA	10*	5*	2*	30*	15*	10*						
MALAWI	5			4								
MAURITIUS	43	30	35*	64	65	60*						
NIGERIA		30*	10*		65*	20*						
REUNION	77	31	30*	186	110	90*						
SENEGAL		3*	3*		12*	12*						
SEYCHELLES	4	3	3F	9	8	8F						
SIERRA LEONE	2	2*		3	4*							
SOUTH AFRICA							35*	40*	10*	46*	50*	12*
SUDAN							10F	10F	12F	75F	75F	80F
TANZANIA							80F	80F	80F	48F	48F	48F
TUNISIA			7			10	8	14	6	30	18	14
N C AMERICA	54208	27352	26499	43787	22126	20642	89296	69161	70831	76997	64390	66075
ARUBA	4			24			1					
BAHAMAS	37	20*	25F	71	60F	70F						
BARBADOS	41	32	32	71	64	60						
BELIZE							348	257	182	281	247	180
BERMUDA	40F	40F	40F	60F	65F	65F						
CANADA	265	391	465	528	642	724	11927	10923	14310	13229	11615	13381
COSTA RICA		325	300F		231	210F	19			22		
CUBA							8175	6825	6000*	11169	9505	7800*
DOMINICAN RP							764	360	400*	497	195	240*
EL SALVADOR	1			1			3061	2727	882	2064	1975	611
GREENLAND	10	10	12	31	42	67						
GUADELOUPE	32	30	25*	85	88	70*						
GUATEMALA							2261	2200*	2900*	1563	1600*	1900*
HAITI							35*	25*	30*	28*	25*	26*
HONDURAS							458	600F	500F	290	570F	450F
JAMAICA							1	4		3	6	
MARTINIQUE	22	18	20*	85	85	90*						
MEXICO	30	25*	160*	33	60*	100*	57992	39559	39278	41944	30729	32557
NETH ANTILLE	15	27	25F	34	43	38F						
NICARAGUA							22	38	20*	38	24	15*
PANAMA			20			21						
SAINT LUCIA	1	1	1F	3	2	2F						
ST PIER MIQU	5	5	5F	11	12	12F						
USA	53705	26428	25369	42750	20732	19113	4232	5643	6329	5868	7899	8915
SOUTH AMERIC	599	1266	1015	567	1276	1009	37644	40773	49759	29071	31889	35955
ARGENTINA							30915	36273	41459	23950	27605	28873
BRAZIL	576	1249	1000*	507	1219	950*	1960	406	260*	1201	320	180*
CHILE							1417	622	2139	1218	600	2600
COLOMBIA	4	4	1	5	2	1	26	115		64	559	
FR GUIANA	13	9	12*	52	44	55*						
PERU							21			13		
URUGUAY							3296	3357	5901	2579	2805	4302
VENEZUELA	6	4	2	3	11	3	9			46		
ASIA	44749	49542	48428	47712	56494	54098	86835	72486	53154	84328	72480	54414
BAHRAIN	70*	40*	50F	230*	140*	170F						
BANGLADESH	2	5	3	2	9	8						
BRUNEI DARUS	9	10*	20*	41	50*	90*						
CHINA	1305	953	1969	854	645	1185	80703	66934	46559	70179	59451	40396*
CYPRUS	377	660	2	626	822	8	493	788	1014	1368	2035	2451
HONG KONG	1329	1423	1532	1910	2230	1932	303	403	270	874	1081	547
INDIA		30*	10*		48*	20*						
INDONESIA	254	142	106	341	186	201			10			6
IRAN							6			6		
IRAQ	72	50*	100*	303	200F	300F						
ISRAEL	1F	100*	100*	1	259	250*	160*	180*	180F	166	178	160F
JAPAN	36354	40129	37643	32852	38563	35160	11*	1	5*	34	4	19
JORDAN	278	360	466	644	758	936	10	30	50	22	109	152
KOREA REP	12	45	23	32	109	101			6			64
KUWAIT	726	800*	700*	1863	2200*	1850*	45	50F	50F	160	180F	180F
LEBANON	100*	80*	80*	200*	200*	220*						
MACAU	23	43	40F	23	51	44F	1	1		1		
MALAYSIA	481	555	450*	584	774	630*	1	1		2	2	
OMAN	151	130	11	252	386	42						
PAKISTAN	178	159	160	254	248	255	2			7		
PHILIPPINES	26	16	69	15	9	53						
QATAR	106	135	110F	235	332	280F						
SAUDI ARABIA	900*	1200*	1880*	2643	3446	5224	44	55	4	119	118	24
SINGAPORE	765	1003	1659	1023	1382	2192	221	474	718	415	993	1654
SRI LANKA	14	14	23	18	18	29						
SYRIA	70	72	10	77	79	28						

TABLE
TABLEAU **71**
CUADRO

NATURAL HONEY 061.6 | MIEL NATUREL 061.6 | MIEL NATURAL 061.6

	IMPORTS IMPORTATIONS IMPORTACION MT			IMPORTS IMPORTATIONS IMPORTACION 1000$			EXPORTS EXPORTATIONS EXPORTACION MT			EXPORTS EXPORTATIONS EXPORTACION 1000$		
	1986	1987	1988	1986	1987	1988	1986	1987	1988	1986	1987	1988
THAILAND	132	130	143	153	149	201	1222	889	1750	800	519	970
TURKEY	14	8	19	36	21	19	3482	2565	2518	6065	4450	5091
U A EMIRATES	500*	750*	550*	1050*	1700*	1200*	100*	90*		190F	160F	
YEMEN AR	200*	200F	200F	700F	720F	720F						
YEMEN DEM	300F	300F	300*	750F	760F	750*	31	25*	20*	3920	3200*	2700*
EUROPE	186244	184971	180165	204285	211984	193055	57309	53698	54746	88163	90930	87923
AUSTRIA	7528	5691	4940	8657	7272	5425	191	167	127	599	675	542
BELGIUM-LUX	5630	5783	5257	7618	8514	7691	1225	1811	830	2146	3459	1726
BULGARIA	540	824	1321	490F	800F	1300F	4623	5345	6509	5100F	5500F	6700F
CZECHOSLOVAK							2300*	2300*	3600*	3292	3673	5090
DENMARK	2855	3623	4351	3527	4107	4516	855	1172	1669	1357	2101	3043
FAEROE IS	5	5	3*	12	16	8*						
FINLAND	329	289	363	593	451	598						
FRANCE	11354	9728	8908	16292	14899	11998	1663	1710	2741	5725	7986	9641
GERMAN DR	80*	45*	90*	150*	165*	230*	1180*	1600*	350*	1680*	1940*	540*
GERMANY FR	87322	83408	84456	89164	90279	84133	16235	14665	13038	29440	27833	25127
GREECE	844	1812	1300*	1248	3046	2300*	215	165	330*	491	580	960*
HUNGARY	3125	3583	3635	2024	1832	1696	14945	12963	13538	17270	16578	15083
ICELAND	41	44	51	98	114	128						
IRELAND	1041	1333	1058	1451	1949	1501	99	48	71	237	139	196
ITALY	10741	10820	8514	13801	13296	10573	368	304	388	946	1181	1166
MALTA	2*	4*	23	4	10	71						
NETHERLANDS	10007	9623	9344	13534	13483	11833	2094	2626	1874	4096	5163	3661
NORWAY	197	290	306	341	553	562	77	9		239	27	
POLAND	1596	1848	2184	1124	1075	1595	2294	965	2158	2965	1090	2422
PORTUGAL	606	736	759	647	829	821	8	15	31	21	34	119
ROMANIA							3300*	3700*	3600*	3300*	4200*	3800*
SPAIN	6359	8043	7928	5855	7598	6971	2465	1478	1521	4612	3405	3477
SWEDEN	2309	3090	3154	2971	4244	4140	39	6	18	82	15	45
SWITZERLAND	5795	5550	6280	9246	10465	11780	62	51	40	333	286	209
UK	21377	23702	22975	17638	21574	20812	1111	1159	969	2230	2677	2244
YUGOSLAVIA	6561	5097	2965	7800	5413	2373	1960	1439	1344	2002	2388	2132
OCEANIA	156	183	214	366	429	581	17809	13427	15631	16005	13650	15966
AUSTRALIA	87	99	150*	228	233	415	14652	11887	13300*	11826	11072	11929
FIJI	8	10F	6*	17	22F	12*						
FR POLYNESIA	18	16	15*	53	66	70*						
NEWCALEDONIA	22	25F	25F	49	60F	60F						
NEW ZEALAND	17	15	16	12	13	20	3140	1520	2289	4143	2554	3995
NIUE							14	5*	22*	10	3	17
PAPUA N GUIN	2	18*	2*	4	35*	4*	3	15*	20F	26	21*	25F
VANUATU	2			3								
USSR	210	506	513	445	1112	1690	20607	20871	17438	21110	22092	18257
DEVPED M E	271332	245833	236678	276868	268554	243916	62824	57019	61414	89868	91321	92699
N AMERICA	53970	26819	25834	43278	21374	19837	16159	16566	20639	19097	19514	22296
W EUROPE	180903	178671	172935	200497	208112	188234	28667	26825	24991	54556	57949	54288
OCEANIA	104	114	166	240	246	435	17792	13407	15589	15969	13626	15924
OTH DEVPED	36355	40229	37743	32853	38822	35410	206	221	195	246	232	191
DEVPING M E	8170	10390	10570	15650	19719	19804	116916	98974	106629	101283	90015	94302
AFRICA	182	157	124	413	466	331	97	106	87	86	75	63
LAT AMERICA	782	1744	1623	974	1909	1670	110781	93368	99951	86971	76765	79734
NEAR EAST	3874	4790	4480	9639	11779	11757	4271	3712	3795	12091	10556	11222
FAR EAST	3225	3575	4238	4396	5263	5756	1750	1768	2754	2099	2595	3241
OTH DVPING	107	124	105	228	302	290	17	20	42	36	24	42
CENTR PLANND	6856	7759	9712	5087	5629	7696	129952	114678	93752	124896	114524	92288
ASIAN CPE	1305	953	1969	854	645	1185	80703	66934	46559	70179	59451	40396
E EUR-USSR	5551	6806	7743	4233	4984	6511	49249	47744	47193	54717	55073	51892
DEVPED ALL	276883	252639	244421	281101	273538	250427	112073	104763	108607	144585	146394	144591
DEVPING ALL	9475	11343	12539	16504	20364	20989	197619	165908	153188	171462	149466	134698

APPENDIX 4

COUNCIL DIRECTIVE

of 22 July 1974

on the harmonization of the laws of the Member States relating to honey

(74/409/EEC)

THE COUNCIL OF THE EUROPEAN COMMUNITIES,

Having regard to the Treaty establishing the European Economic Community, and in particular Articles 43 and 100 thereof;

Having regard to the proposal from the Commission;

Having regard to the Opinion of the European Parliament;

Whereas the laws, regulations and administrative provisions of the Member States define the term 'honey', specify the different varieties and lay down the requirements to be met by the product and the information which must appear on the packages or labels;

Whereas the differences existing between these laws hinder the free movement of this product and may create unfair conditions of competition;

Whereas, therefore, it is necessary at Community level to define the term 'honey', to make provision for the different varieties which may be marketed under appropriate names to fix the general specific criteria for its composition, and to lay down the main information which is to appear on labels;

Whereas the choice of the methods of sampling and analysis necessary for checking the composition and characteristics of honey is an implementing measure of a technical nature; whereas their adoption should be entrusted to the Commission in order to simplify and expedite the procedure;

Whereas in all cases in which the Council confers on the Commission authority to implement rules relating to foodstuffs, a procedure should be laid down establishing close cooperation between the Member States and the Commission within the Standing Committee on Foodstuffs set up by Council Decision No 69/414/EEC [1];

Whereas Article 3 of this Directive prohibits the use of the term 'honey' for products which do not comply with the definition laid down in Article 1 (1); whereas, however, the immediate implementation of this ban could cause disturbance of the market where the use of the terms 'Kunsthonig' or 'Kunsthonning' is permitted by previous national legislation to describe a product other than honey; whereas provision should consequently be made for an appropriate transitional period to allow the necessary changes to be made;

Whereas pending the adoption of general Community rules regarding the labelling of foodstuffs, a number of national provisions should be maintained on a transitional basis;

Whereas there are at present on the market in certain Member States honeys with various analytical characteristics; whereas it would appear difficult to apply to them all the criteria laid down in the Annex to this Directive; whereas, however, a more detailed study would make it possible to review the situation at a later date,

HAS ADOPTED THIS DIRECTIVE:

Article 1

1. For the purposes of this Directive 'honey' shall mean the foodstuff which is produced by the honey-bee from the nectar of blossoms or secretions of or on living parts of plants, and which the bees collect, transform, combine with specific substances of their own and store and leave to mature in honey combs. This foodstuff may be fluid, viscous or crystallized.

2. The main types of honey are as follows:

(a) according to origin

blossom honey:

honey obtained predominantly from the nectar of blossoms;

[1] OJ No L 291, 19. 11. 1969, p. 9.

honeydew honey:

honey obtained predominantly from secretions of or on living parts of plants; its colour varies from light or greenish brown to almost black;

(b) according to mode of presentation

comb honey:

honey stored by bees in the cells of freshly built broodless combs and sold in sealed whole combs or sections of such combs;

chunk honey:

honey which contains one or more pieces of comb honey;

drained honey:

honey obtained by draining decapped broodless combs;

extracted honey:

honey obtained by centrifuging decapped broodless combs;

pressed honey:

honey obtained by pressing broodless combs with or without the application of moderate heat;

Article 2

Member States shall take all measures necessary to ensure that honey may be offered for sale only if it conforms to the definitions and rules laid down in this Directive and in the Annex thereto.

Article 3

1. The term 'honey' shall be applied only to the product defined in Article 1 (1) and must be used in trade to designate that product, without prejudice to the provisions laid down in Article 7 (1) (a) and (2).

2. The names referred to in Article 1 (2) shall be applied only to the products defined there in.

Article 4

By way of derogation from Article 3 (1) the terms 'Kunsthonning' and 'Kunsthonig' may continue to be used in Denmark and in Germany respectively for a period of five years starting from the date of notification of this Directive, to describe a product other than honey, in accordance with the national provisions governing this product in force at the time of the notification of this Directive.

Article 5

No product other than honey may be added to honey offered for sale as such.

Article 6

1. When it is marketed the honey shall comply with the compositional criteria listed in the Annex.

However, by way of derogation from the second indent of paragraph 2 of the said Annex, Member States may authorize in their own territory:

(a) the marketing of heather honey with a maximum moisture content of 25 %, if this is the result of natural conditions of production,

(b) the marketing of 'baker's honey' in 'industrial honey' with a moisture content of not more than 25 %, if this is the result of natural conditions of production.

2. In addition:

(a) honey shall, as far as practicable, be free from organic or inorganic matters foreign to its composition, such as mould, insects, insect debris, brood or grains of sand, when the honey is marketed as such or is used in any product for human consumption;

(b) honey shall not:

(i) have any foreign tastes or odours;

(ii) have begun to ferment or effervesce;

(iii) have been heated to such an extent that its natural enzymes are destroyed or made inactive;

(iv) have an artificially changed acidity;

(c) honey may under no circumstances contain substances in such quantity as to endanger human health.

3. By way of derogation from paragraphs 1 and 2, honey may be marketed as 'baker's honey' or

'industrial honey' if, although suitable for human consumption:

(a) it does not comply with the requirements referred to in paragraph 2 (b), (i), (ii), (iii), or

(b) its diastase activity or hydroxymethylfurfural content do not comply with the specifications laid down in the Annex.

However, in the case referred to under (b) a Member State may refrain from making use of this term compulsory and allow the term 'honey' to be used. Within five years from the date of notification of this Directive the Council shall decide, on a proposal from the Commission, on provisions designed to lay down identical technical specifications for the entire Community.

Article 7

1. The only information which is compulsory on the packages, containers or labels of honey, which information must be conspicuous, clearly legible and indelible, shall be the following:

(a) the term 'honey' or one of the names listed in Article 1 (2); 'comb honey' and 'chunk honey' must, however, be described as such; in the cases referred to in subparagraph (b) of the second paragraph of Article 6 (1) and in the first paragraph of Article 6 (3), the name of the product shall be 'baker's honey' or 'industrial honey';

(b) the net weight expressed in grammes or kilogrammes;

(c) the name or trade name and the address or registered office of the producer or packer, or of a seller established within the Community.

2. The Member States may require in their own territory use of the name 'honeydew honey' for honey which is predominantly honeydew honey, which has the organoleptic, physico-chemical and microscopic characteristics of such honey and for which there is given no indication of a specific plant origin, such as 'pine honey'.

3. By way of derogation from paragraph 1, the Member States may retain any national provisions which require indication of the country of origin. This information, however, may no longer be required for honey originating in the Community.

4. The term 'honey' referred to in paragraph 1 (a) or one of the names referred to in Article 1 (2) may be supplemented *inter alia* by:

(a) a reference to the origin, whether blossom or plant, provided the product comes predominantly from the source indicated and has the appropriate organoleptic, physico-chemical, and microscopic characteristics;

(b) a regional, territorial or topographical name, provided the product originates entirely in the area indicated.

5. Where honey is put up in packages or containers of a net weight equal to or exceeding 10 kilogrammes and is not retailed, the information referred to in paragraph 1 (b) and (c) may, if desired, appear only on the accompanying documents.

6. Member States shall refrain from stating, apart from what is laid down in paragraph 1, how the information referred to in that paragraph is to be given. However, Member States may forbid trade in honey in their territory if the markings laid down in paragraph 1 (a) are not shown on one side of the package or container in the national language or languages.

7. Until the end of the transitional period during which the imperial units of measurement contained in Annex II to Council Directive No 71/354/EEC [1] of 18 October 1971 relating to units of measurement which may be used in the Community, Member States may require that the weight should also be expressed in imperial units of measurement.

8. Paragraphs 1 to 7 shall apply without prejudice to subsequent provisions laid down by the Community on labelling.

Article 8

1. Member States shall adopt all the measures necessary to ensure that trade in the products referred to in Article 1, which comply with the definitions and rules laid down in this Directive and in Annex I thereto, shall not be impeded by the application of national non-harmonized provisions governing the composition, manufacturing specifications, packaging or labelling of these products in particular or of foodstuffs in general.

2. Paragraph 1 shall not be applicable to non-harmonized provisions justified on grounds of:

[1] OJ No L 243, 29. 10. 1971, p. 29.

— protection of public health,

— repression of frauds unless such provisions are liable to impede the application of the definitions and rules laid down by this Directive,

— protection of industrial and commercial property, of indications of source, designations of origin and the repression of unfair competition.

Article 9

The methods of sampling and analysis necessary for checking the composition and characteristics of honey shall be determined in accordance with the procedure laid down in Article 10.

Article 10

1. Where the procedure laid down in this Article is to be followed, the matter shall be referred to the Standing Committee on Foodstuffs set up by the Council Decision of 13 November 1969 (hereinafter called the 'Committee') by its Chairman, either on his own initiative or at the request of a representative of a Member State.

2. The representative of the Commission shall submit to the Committee a draft of the measures to be taken. The Committee shall give its Opinion on that draft within a time limit set by the Chairman having regard to the urgency of the matter. Opinions shall be delivered by a majority of 41 votes, the votes of the Member States being weighted as provided in Article 148 (2) of the Treaty. The Chairman shall not vote.

3. (a) Where the measures envisaged are in accordance with the Opinion of the Committee, the Commission shall adopt them.

(b) Where the measures envisaged are not in accordance with the Opinion of the Committee or if no opinion is delivered, the Commission shall without delay submit to the Council a proposal on the measures to be taken. The Council shall act by a qualified majority.

(c) If within three months of the proposal being submitted to it, the Council has not acted, the proposed measures shall be adopted by the Commission.

Article 11

The provisions of Article 10 shall apply for 18 months from the date on which the matter was first referred to the Committee, under Article 10 (1).

Article 12

This Directive shall not affect national provisions relating to the scales of weights according to which honey must be marketed; the Council, on a proposal from the Commission, shall adopt the appropriate Community provisions before 1 January 1979.

Article 13

This Directive shall not apply to products intended for export from the Community.

Article 14

Member States shall, if necessary, within a period of one year following notification of this Directive, amend their laws in accordance with the provisions of this Directive and shall forthwith inform the Commission thereof. The laws thus amended shall apply to the products offered for sale in the Member States two years after the notification of this Directive.

Article 15

This Directive is addressed to the Member States.

Done at Brussels, 22 July 1974

For the Council

The President

J. SAUVAGNARGUES

ANNEX

COMPOSITIONAL CRITERIA FOR HONEY

1. Apparent reducing sugar content, calculated as invert sugar

— Blossom honey	not less than 65 %
— Honeydew honey and blends of honeydew honey and blossom honey	not less than 60 %

2. Moisture content

— In general	not more than 21 %
— Heather honey (Calluna) and clover honey (Trifolium sp.)	not more than 23 %

3. Apparent sucrose content

— In general	not more than 5 %
— Honeydew honey, and blends of honeydew honey and blossom honey, acacia, lavender and banksia menziesii honeys	not more than 10 %

4. Water-insoluble solids content

— In general	not more than 0·1 %
— Pressed honey	not more than 0·5 %

5. Mineral content (ash)

— In general	not more than 0·6 %
— Honeydew honey, and blends of honeydew honey and blossom honey	not more than 1 %

6. Acidity	not more than 40 milli-equivalents acid per 1 000 grammes

7. Diastase activity and hydroxymethylfurfural content (HMF) determined after processing and blending

(a) *Diastase activity (Schade* scale)

— In general	not less than 8
— Honeys with low natural enzyme content (e.g. citrus) and a HMF content not more than 15 mg/kg	not less than 3

(b) *HMF*	not more than 40 mg/kg (subject to the provisions of paragraph (a) second indent)

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