



General organic beekeeping data and market trends

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Outline

- Introduction
- Overview by regions - countries
- Conclusions



Introduction

- The importance of knowing about the development, problems, risk, potential and possible solutions on organic beekeeping.
- Presentation of the first data gathered and other topics as GMO's -risk, beekeeping in Mexico, regulations, case of commercialization.
- «Second World Conference on Organic Beekeeping» which will be carried out in April 2012 in Chiapas Mexico.
- Formation of a Network - Platform for the organic beekeeping sector.

European Union

- Organic beekeeping was first regulated in 1991 with the EU Regulation 184/91
- In nine surveyed EU countries organic beekeeping represents 0.1 and 8 percent of all beekeeping.
- On average, an organic beekeeper manages 130 hives while conventional beekeepers manages on average 23 hives.



European Union

Country	Nr. Hives	Bee-keepers	Colony	Comments
Italy	103,000 / 8.0%	9,000 / 13%	11 / 17	Leader, 300 Euros, 15% of honey, prize BioMiel
Romania	84,700 / 7.7%	620 / 0.8%	136 / 14	Dynamic stage, increase
Spain	57,600 / 3.0%	194 / 0.8%	296 / 72	
Bulgaria	44,850 / 6.5%	150 / 0.3%	300 / 14	Start 90', 13 Euros, group certification, 1,700 ton (15%), GMO free
France	42,500 / 3.0%	219 / 0.3%	194 / 16	Honey specialties, professional
Germany	25,000 / 3.0%	600 / 0.7%	42 / 10	Major importer, produce 25% consumption, most hobby
Greece	12,000 / 0.85%	94 / 0.4%	128 / 54	Just beginning
Portugal	6,120 / 1.0%	49 / 0.3%	124 / 14	Just beginning
Poland	1000 / 0.1%	60 / 0.1%	17 / 17	Just beginning, cost high, nat. Reg. complicated

European Union

Significance and sources of imports

- North and central Europe are not self-reliant
- Constant growth on organic: bee products with high potential
- Germany is key player in the import
- Organic honey imports mostly from EU countries and LA
- Imported honey cheaper than local honey



No EU countries

Country	Nr. Hives	Bee-keepers	Colony	Comments
Turkey	115,000 / 2.6%	147 / 0.1%	76 / 29	
Switzerland	6,000 / 3.5%	150 / 0.9%	40 / 10	
Macedonia	15,000 / 20.0%	---	---	

Turkey

- Produces different varieties and flavors of honey
- Now is one of the ten largest producer of honey worldwide and the largest producer of pine honey
- They are at the moment 318 beekeepers in conversion
- Problems: implementation of organic beekeeping methods and low honey yields

Switzerland

- Switzerland: 6,000 organic hives managed by about 150 beekeepers (1.8%). 40 hives/beekeeper.
- Beekeeping is regulated: Swiss ordinance (= EU) and private standards Bio Suisse and Demeter).
- Organic honey production is about 90 tones.



Switzerland

- Honey types: multifloral, forest, alpine honey, chestnut
- Bee density, the highest of the world (4.5 per square kilometer)
- Most are hobby beekeepers (specialized stores and private)
- Supermarkets started, the industry has high demand



Switzerland

- The potential of organic honey is good
- Annual increase in the market from 10 to 15% next years
- Imported honey from India, Mexico, Cuba, Nicaragua, Brazil, Argentina, Germany, Italy, France
- A Swiss retailer offer organic honey for 13 Swiss franc kg



Further regions

- › **Middle east:** very little information available
- › **Africa:** partially beekeeping is fulfilling the standards, there are big potential for organic beekeeping for the local and export markets (private initiatives)
- › **Asia:** big producers as China, India, Thailand and Vietnam. Organic beekeeping in initial phase.



Further regions

Latin America:

- Brazil is the world largest producer of organic honey, several big companies producing over 1000 tons, main certifiers IMO, IBD, BCS
- Argentina produces 830 tons in 2009 from 57,600 hives, GMO problem
- Chile has 5-7 organic beekeepers with managed about 1,500 hives each (10,000).



Conclusion (1)

- In general organic beekeepers manages more colonies than conventional beekeepers: trend to professionalization (demand driven).
- In many countries organic beekeeping shows very low percentages in comparison to conventional beekeeping but some countries are in very dynamic stage or other just starting, lobbying of beekeepers can reach political decision but is matter of being organized

Conclusion (2)

- The demand of organic honey is very high but it can not be satisfied due to different reason: lack of knowledge on organic beekeeping methods, low honey yields, complicated market access for many beekeepers, over exaggerated export regulations (EU), prices of organic honey due not cover production cost, etc.
- Do not forget to assist to the «**Second World Conference on Organic Beekeeping**» which will be carried out in April 2012 in Chiapas Mexico.
- Participate in the **Network - Platform** for the organic beekeeping sector.