



# Export opportunities for African Organic Honey

*Summary of a market study*

July 2002

Author: F. J. Koekoek

© EPOPA 2005

This information can be freely used provided  
the original document is accurately quoted.  
For questions about this document contact:

EPOPA  
PO Box 63  
6720 AB Bennekom, The Netherlands  
Email: [epopa@agroeco.nl](mailto:epopa@agroeco.nl)  
[www.epopa.info](http://www.epopa.info)

## Market size and characteristics

---

African honeys are different from mainstream European honeys in taste and quality. Tanzanian honeys typically have a strong and smoky taste, a relatively dark color and often show a poor performance on technical parameters like HMF and moisture content. Whereas some of these aspects can be improved by better management, others are inherent to the natural conditions for tropical honey production.

Very little African honey is actually exported to Europe. Although honey production is common throughout Africa, production volumes are limited and most of it is consumed domestically. On the domestic market honey is usually considered as a medicine and accordingly fetches high prices. The quality standards are very different from Europe, where honey is considered a (natural) foodstuff.

Nevertheless, there is a market for African honeys in Europe. There is also a market for African organic honeys. Europe is very dependent on honey imports since domestic production only covers 40% of demand. Imported honeys may be used as *industrial* or *baker's honey*, as an ingredient in *blended table honeys* (sold through retail outlets), or as *single origin specialty honeys*, which are also table honeys. For each segment, different quality standards apply, and different prices are paid.

The organic honey market is estimated at around 1% of the total honey market, which is relatively small. The background to this is that the distinction between conventional and organic honey is rather small, since honey is a natural product anyhow. This distinction might become more important however, if the public becomes conscious of the recurrent scandals with contaminations in especially Chinese honeys. Currently, Chinese honeys are banned from the EU because of the risk of contaminations with antibiotics. On the other hand, if quality standards on conventional honeys are maintained more strictly, the space for organic honey again decreases. In the UK, the market share of organic honey is much larger (between 4 and 5%), but the general (per capita) honey consumption is much lower.

The organic markets in Germany, the UK and the Netherlands together were estimated at 2,000 tons. The share of the industrial market was estimated at 50% of the total organic market, which is much larger than the 20% overall industrial honey share. The reason is that many organic food manufacturers like to use (and quote) honey as an ingredient in their products. At the retail level, the organic sector is characterized by a large number of specialty (single origin) honeys. The amount of blended table honeys is smaller. This means that there are opportunities both at the top-end and the bottom-end of the organic market.

## Opportunities for African organic honey

---

Since supply of African honey is limited, it would be interesting to market it as a specialty. This way revenue would be increased. The most attractive segments are the single origin, organic and fair trade niches (which partly overlap). Tanzanian (Tabora) and Zambian honeys have traditionally been marketed as single origin, fair trade and organic honeys, but not without difficulties. A strategy that targets the high-end of the market requires a consistent quality and a regular, reliable supply. If these demands cannot be met, however, the African honey can be sold as baker's honey. And even then organic certification (as well as fair trade certification), would earn the honey a premium.