

ROMANIA

NATURAL HONEY



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Chapter I

General characteristics of product



Natural honey is classified under 0409 position of Harmonized System Commodity Description and Classification (HS).

Honey is a natural complex product, result of floral nectar of plants and enrichment by bees (*Apis mellifera L*) with its substance through the action of the juice secreted by their glands. Bees produce honey frequently and mildew, which comes from different sugary liquids from the plant, but not in flower.

Proteins, albuminoidal materials, acids, minerals, organic origin of functional substances, vitamins, natural antibiotics, hormones and pollen are embedded in honey nectar.

Honey production quality is a matter of prestige, the main criterion for classification of bee products becoming just the quality of products delivered, the presentation by brands and varieties.

Honey has a number of specific sensory characteristics: appearance (no foam, no visible foreign bodies), color (from colorless to slightly yellow, golden yellow, yellow-orange, dark yellow, ruby, dark brown), smell and taste (specific honey flavor less or more pronounced, sweet taste), texture (smooth, fluid, viscous, crystallized).

Honey is the main product of bees, rich in sugars, as glucose and fructose, mainly coming from floral nectar, extra floral, mildew and other sources collected by bees and stored in the combs.

By way of provenance, honey is classified as: mono-floral honey and multi-floral honey and forest honey.

- Mono-floral honey – which comes entirely or mostly from the nectar of a plant species (acacia, lime, sunflower, rapeseed, etc.).
- Multi-floral honey – coming from a mixture of nectar from flowers of different species or a mixture of flower honeys (hay hill, plain, pond, trees, acacia-lime, lime-sunflower, etc.).
- Forest honey – which comes mostly from sweet juices of other parts of plants than flowers, mixed with forest flora)

By way of processing, honey is classified as:

- Honey comb
- Free drained honey
- Centrifuged honey

Biologically active substances contained in honey gave it a plurality of effects with overall therapeutic actions, including: trophic and invigorating tonic, healing, preservative, protective anti-germinative, nutritious, haemostatic, regenerating.

Range of aromas and exotic flavors from different parts of the world



Honey type	Country(ies) of origin
Apple blossom	UK
Acacia	Eastern Europe (Hungary, Romania, Bulgaria)
Borage	UK/New Zealand
Cherry blossom	UK
Clover	Canada/New Zealand
Eucalyptus	Australia
Hawthorn	UK
Heather	UK
Lavender	France/Spain
Leatherwood	Tasmania
Lime blossom	China/UK/ Poland
Orange blossom	Spain/Mexico
Rosemary	France/Spain
Strawberry clover	Australia
Wild thyme	Greece/New Zealand/France/Spain
Sunflower	France/Spain

Chapter II

World honey market

Annual world production of honey was estimated, on average, to about 1.5 million tons. Approximately one third of this production (420,000 tons) is traded on the international market. Global market for honey has been estimated to reach 1.9 million tons by 2015.

According to *FAO*, in 2010, main world honey producers were China (398,000 tons), Turkey (81,115 tons), USA (79,789 tons), Ukraine (70,800 tons) and Argentina (59,000 tons). Romania ranks the 20th with 22,222 tons.

Increasing consumer preference for bee products stimulates the expansion of food products range based on honey. Moreover, honey contains antioxidants, minerals, vitamins and proteins, which features an attractive ingredient compared to artificial sweeteners. Europe and Asia - Pacific (including Japan) dominate the global market of honey. This market is currently facing major difficulties related to the mass loss of bee colonies (*CDD - Colony Collapse Disorder*), caused by various factors such as stress, pests and diseases. Thus, since 2007, world honey market recorded a deficit of supply, which is determined by achieving very low output in major producing regions, caused by a long arid summer in Eastern Europe, a prolonged drought in Australia and triggering CDD in the U.S., amid unprecedented growth in consumer demand in China and India.



World trade with honey, 2010

	Value (1000' Euros)	Annual growth in value 2006-2010 (%)	Annual growth in volume 2006-2010 (%)	Annual growth in value 2009-2010(%)
Exports	1,125,074	16	2	18
Imports	1,128,972	17	3	19

Source: ITC/UNCTAD/WTO Trademap, CRPCIS – data processing

Major honey importing regions are Europe (60% of world imports), America (20%), Asia (17%) and Middle East (5%). EU and U.S. imports cover 50% of domestic demand. Until 2002, China has occupied a leading position in exports of honey (about 100,000 tons), but anti-dumping measures imposed by U.S. and EU's imports ban due to chloramphenicol residues contained by Chinese honey have caused a gradual decrease of this country's exports. In general, honey intended to export is packed in containers of 300 kg, for retail sector being packed in containers of various sizes, depending on specific consumer market.

World honey exports totaled about 1,125 million Euros in 2010. Top 10 exporting countries were China, Argentina, Germany, Mexico, Spain, New Zealand, India, Hungary, Canada and Brazil, accounting for about 63.8% of total global exports of honey. Romania ranks 13 in top 20 exporters

worldwide, with a 2.9% share of total world exports. The value of Romania's honey exports is about 32 million Euros, representing an amount of 11,000 tons.

World honey imports totaled 1,129 million Euros in 2010. Main importing countries were: USA, Germany, UK, Japan, France, Italy, Belgium, Spain, Switzerland and Netherlands. Share of these countries in total world imports was 75.8% in 2010. Romania's share in total world imports is almost negligible (0.16%), representing only 1.795 million Euros for 880 tons.

Chapter III

Romanian market for honey

Main feature of Romanian honey market is that most of production comes from small private producers, some of them being under the protective umbrella of processors or trade associations, or having supply contracts with them. Currently, there are about 35,000 beekeepers and about one million bee colonies in Romania. According to statistics, about 70% of annual honey production is exported, but, even so, exports are declining.

After 2007, beekeepers have managed to introduce new technologies for beekeeping and the new European regulations on specific apicultural treatments improved the quality of honey.

According to *FAO*, in 2010 honey production amounted to 22,222 tones, up from 2009 when it totaled 19,937 tones. Romania has a great potential for developing the beekeeping sector, to about 1.5 million bee colonies. Regarding the bees' number, at the end of 2009, Romania has recorded 1.101 million bee colonies, yet still below year 1989, when were recorded 1.201 million bee colonies. During 2007 - 2009, National Bee Program support for restocking the bee colonies resulted in an increased number of average bee colonies per farm. For 2010, forecasts indicate a 6.5% growth of bee colonies number to 1.170 million. The number of beekeepers is estimated at 40,000 to 45,000, from 80,000 beekeepers in the '80s.

Growing number of bee colonies is due to accessing the funds provided in the National Bee Program for 2008 - 2010 by purchasing biological material needed for hives restocking, which has led to increasing and/or replacing bee families in accordance with beekeeping practices and, consequently, to larger, healthier and more productive apiaries.



National Bee Program was approved in May 2008 and contains the types of activities eligible for financial aid and conditions for supporting beekeepers associations organized in bee breeding, bee unions, cooperatives or producer groups. Financial aid is granted for producing high quality bee products, for preventing and controlling varroasis, but also for restocking bee colonies. European Commission is financing these measures up to 50% of costs incurred by Romania for each operation, excluding VAT.

Number of beehives in Romania, 2006 - 2010

Year	2006	2007	2008	2009	2010
	888,200	891,043	982,368	998,000	1,057,190

Source: FAOSTAT

Romania ranks 3rd in EU as regards the honey production (after Spain and Germany) and 4th as regards the beehives livestock (after Spain, Poland and Greece).

A share of 20 - 25% of honey production is made within the mountain area. In 2010, the 22,222 tons of honey production came from 1.1 million bee families. Estimates for 2011 are for a 20,000 tons production, if favorable weather.

Honey production in Romania, 2006 - 2010

Year	2006	2007	2008	2009	2010
(tons)	18,195	16,767	19,833	19,937	22,222

Source: FAOSTAT

Recently, number of organic beekeepers increased over 1,000, with a honey production of about 3,000 tons, most of it export oriented. If in 2005 there were 132 registered beekeepers certified for organic beekeeping, in 2008 their number increased to 584 producers, 15 processors, 22 traders, one importer and 8 exporters of natural honey. In 2009, there were 1,018 organic beekeepers, with a 3,200 tons production of organic honey compared to 2,357 tons in 2008. In 2010, Romania's organic honey production surpassed 3, 000 tons of which over 1,400 tons went to Germany.



Romania is one of the European countries with lowest honey consumption although there has been some increasing over the last years. Thus, during the last two decades, honey consumption registered a 10 folds increase from 50 - 60 gr. per capita to 400 - 600 gr. today. Nevertheless, Romanians still consume less honey compared to Western countries with an annually honey consumption of 4 - 5 kg. Over the last 2 years, honey consumption in Romania has doubled due to new natural honey-made remedies emerged on the market.

Internal market could absorb whole domestic production provided that, within the next 10 years, domestic honey consumption would triple.

Domestic honey unit price has increased by 10% and, due to lower production, high oil and beehive medicine prices, increasing will reach to 30%. Honey prices on domestic market are set by external demand and not by domestic consumption.

Honey producer prices in Romania, 2005 - 2009

Year	2005	2006	2007	2008	2009
(USD/ton)	4,252.4	4,150.2	4,924.8	5,256.3	4,852.9

Source: FAOSTAT

Lower domestic honey consumption has led to higher export deliveries. About 60% of honey production is export oriented, with a unit price of 2.4 - 3.5 euro/kg depending on product type (polyfloral or acacia). Main export markets for Romanian honey are Germany, United Kingdom, Italy, France but also USA, Canada, Japan or China. Unfortunately, local product is exported mainly in bulk often to be used as blended by external processors.

Chapter IV

Romania's international trade with honey

SWOT analysis of Romanian apicultural sector

4.1. Romania's international trade with honey

During 2006 - 2010, Romania's trade with honey experienced strong upward trend, supported exclusively by the evolution of exports. Thus, if last five years, world demand for honey has registered an average annual growth of 16%, Romanian exports of honey have increased, on average by 30%.

Honey trade balance, 2006 - 2010

		2006	2007	2008	2009	2010
Exports	1000' Euros	16,393	11,907	16,946	29,974	31,594
	tons	9,606	6,255	7,087	10,654	11,017
Imports	1000' Euros	127	565	1,363	1,108	1,795
	tons	63	315	777	516	880

Source: ITC/UNCTAD/WTO Trademap, CRPCIS – data processing



Honey exports value has strongly recovered in 2010 after a sharp decline of 27% during 2007, reaching almost 32 million Euros. Despite this recovery, exports value registered a modest growth in 2010 compared to previous year (+5%). Nevertheless, Romania still ranks within the main 15 global suppliers of honey.

Romania's main export markets are among the European countries like Germany, UK, Italy, Austria and Poland (over 90% of exports).

Romania - Honey exports in 2010

	Exports value 2010 (1000' Euros)	Share in Romania's exports (%)	Exports volume (tons)	Exported growth in value, 2006-2010 (% p.a.)	Exported growth in volume, 2006-2010 (% p.a.)	Exported growth in value, 2009-2010 (% p.a.)	Ranking of partner countries in world imports	Share of partner countries in world imports (%)
Total exports, of which:	31,593.80	100.0	11,017	27	8	0	-	100.0
Germany	17,666.41	55.9	6,069	24	6	-8	2	19.8
UK	4,857.34	15.4	1,826	25	4	9	3	7.1
Italy	3,375.29	10.7	1,183	57	37	11	6	3.7
Austria	2,177.14	6.9	769	198	49	187	12	1.8
Poland	754.58	2.4	273	53	36	39	13	1.8

France	420.97	1.3	121	57	53	-30	5	6.6
Spain	364.49	1.2	110	-13	-28	450	8	2.6
Sweden ¹	324.58	1.0	103	-	-	56	15	1.3
Japan	251.53	0.8	61	9	1	-15	4	6.9
USA	244.00	0.8	131	160	72	281	1	20.9
Netherlands ²	240.23	0.8	61	116	-7	-50	10	2.3
Belgium	200.32	0.6	59	-15	-26	-69	7	3.5
Luxembourg ¹	195.05	0.6	78	-	-	-69	56	0.1
Hungary	115.97	0.4	41	-43	-50	3	61	0.1
Czech Rep.	113.71	0.4	42	29	17	12	27	0.5
Greece	70.79	0.2	21	3	-15	-28	25	0.6
Switzerland ¹	58.74	0.2	16	-	-	-53	9	2.4
Slovakia ⁴	51.21	0.2	24	-	-	-	24	0.6
Canada	30.12	0.1	9	29	22	-13	19	1.0
Israel ⁴	30.12	0.1	9	-	-	-	32	0.3
China ⁴	18.83	0.1	5	-	-	-	22	0.7
Denmark ⁴	12.05	0	3	-	-	-	17	1.1
Kuwait ⁴	11.3	0	2	-	-	-	41	0.2
Singapore ³	6.78	0	1	-	-	-	21	0.7

Notes: ¹ importing from Romania since 2008

² no imports from Romania during 2007 – 2008

³ no imports from Romania in 2006 and 2009

⁴ importing from Romania since 2010

■ Export markets with increasing import demand, during 2006 - 2010

■ Export markets with relative stagnant demand, during 2006 - 2010

■ Export markets with decreasing demand, during 2006 - 2010

Source: ITC/UNCTAD/WTO Trademap, CRPCIS – data processing

Based on average annual rate growth of Romanian export markets' demand and on average annual growth rate of imports on these markets, they may be classified by 4 main categories:

- markets with a high potential for Romanian honey exports: Germany, UK, Italy, Austria, Poland, France, USA, Czech Rep., Canada, Switzerland, Luxembourg, Sweden
- markets with a stagnant demand for Romanian honey exports: Spain, Japan, Belgium
- markets with a declining demand for Romanian honey exports: Greece, Hungary, Singapore
- new markets with high potential for Romanian exports: Slovakia, Israel, China, Denmark, Kuwait

Romania's imports of honey are very low compared to main world consumer countries. Yet, during 2006 – 2010, honey imports have registered an exponential growth in value and in volume. Consequently, while imports volume of Romanian market were only 21 tons (35,000 Euros, in value), at the end of 2010 it was registering a significant growth to over 800 tons (about 1.1 million Euros).

Romania's main suppliers of honey, 2006 - 2010

- 1000' Euros -

Suppliers	2006	2007	2008	2009	2010
Total imports, of which:	126.57	565.39	1,363.39	1,107.82	1,794.58
China	0	0	318.08	223	594.18
Czech Rep.	0	6.57	664.02	552.12	491.76
Germany	0	0	186.9	162.05	356.2
France	0	0	0.68	8.6	124.26
United Kingdom	0	0	0	3.59	70.79
Hungary	0	4.38	79.52	78.16	58.74
Netherlands	0	0	0	3.59	32.38
Italy	3.98	7.3	8.16	16.49	24.1
Spain	0	55.44	32.62	27.25	20.33
Austria	4.78	11.67	19.03	22.23	9.04
Belgium	0	0	9.52	10.76	7.53
Greece	0	0	0	0	2.26
USA	0	0	0	0	1.51

Source: ITC/UNCTAD/WTO Trademap, CRPCIS – data processing

4.2. SWOT analysis of Romanian beekeeping sector

SWOT analysis of Romanian honey market shows the following aspects:

<p>Strengths</p> <ul style="list-style-type: none"> ▪ favorable climate for beekeeping ▪ high quality of Romanian honey compared to other main global suppliers ▪ beekeepers associations are aware of quality control management for expanding honey exports ▪ high concentration of processing and marketing on domestic and external market 	<p>Weaknesses</p> <ul style="list-style-type: none"> ▪ production depending on natural conditions ▪ low concentration of production (there are many individual unprofessional beekeepers) ▪ low quality of raw product (impurities), poor hygienic conditions for storage ▪ low technology level to small individual producers ▪ lack of market organization and of product listing to stock exchange
<p>Opportunities</p> <ul style="list-style-type: none"> ▪ implementing new quality and control standards will enhance marketing activity on domestic and external market ▪ exporting high quality honey will boost export prices ▪ increasing organic honey exports ▪ diversification of honey varieties and expanding range of derivative products* 	<p>Threats</p> <ul style="list-style-type: none"> ▪ current structure of Romanian honey market, especially at producer level is a major obstacle for introducing quality control ▪ producers weak influence on the market for preserving the honey quality ▪ export revenues do not reflect directly the producers prices ▪ insufficient financial reserves for improving production process

* comb honey; liquors; jams and jellies; honey with fruits, nuts and seeds ; honey with pollen and propolis; honey paste for external injuries treatment; toffees; nougat; gingerbread; marzipan; dried honey, etc.



Chapter V

Romania's export potential for honey

Global honey market went through a relatively stagnant and even slightly decreasing demand. Thus, average annual value demand (16%) well surpassed average annual quantitative demand (1%), so that the honey market has moved upward based on increasing trade prices.

World honey imports were over 1,100 million Euros in 2010, registering an average 17% growth rate within the last 5 years. At the same time, global imports of honey marked a modest growth rate in volume, of only 3%.

Top 10 world importers of honey in 2010 were USA, Germany, United Kingdom, Japan, France, Italy, Belgium, Netherlands, Spain and Switzerland. Cumulated share of their imports reached to 75% of total world imports in 2010.

Main global suppliers of honey were Argentina, China, Germany, Mexico and Brazil, Romania ranking 13 in top 20 exporters worldwide, with a 2.9% share of total world exports.

**World main importers of honey and
Romania's position as supplier to these markets, 2010**

	Value imported in 2010	Quantity imported in 2010	Annual growth in value 2006 - 2010	Annual growth in quantity 2006 - 2010	Annual growth in value 2009 - 2010	Share in world imports	Top suppliers and rank of Romania on the market in 2010
	(1000' Euros)	(tons)	(%)	(%)	(%)	(%)	-
Total imports, of which:	1,128,972	495,750	17	3	19	100.0	CN, AR, DE, MX, ES RO – 13
1 USA	229,633	114,128	13	-3	32	20.3	AR, VN, IN, CA, BR RO – 29
2 Germany	217,694	89,550	16	-1	13	19.3	AR, MX, CL, BG, ES RO – 6
3 United Kingdom	78,425	31,472	11	2	1	6.9	CN, NZ, DE, MX, AR RO – 7
4 Japan	75,494	39,950	13	0	15	6.7	CN, AR, CA, NZ, HU RO – 15
5 France	71,949	25,308	17	3	12	6.4	ES, HU, DE, CN, AR RO – 15
6 Italy	40,178	14,554	22	5	3	3.6	HU, AR, DE, ES, BG RO – 3
7 Belgium	37,998	21,964	29	27	10	3.4	CN, DE, MX, AR, FR RO – 17
8 Saudi Arabia	36,398	12,809	8	-2	64	3.2	MX, DE, YE, IN, AR -
9 Spain	28,649	17,718	11	3	3	2.5	CN, DE, BE, FR, UY RO – 13
10 Switzerland	26,505	7,893	18	5	7	2.3	MX, DE, FR, AT, AR RO – 18
11 Netherlands	24,891	9,580	15	5	-5	2.2	DE, CN, BE, MX, HU RO – 6

		Value imported in 2010	Quantity imported in 2010	Annual growth in value 2006 - 2010	Annual growth in quantity 2006 - 2010	Annual growth in value 2009 - 2010	Share in world imports	Top suppliers and rank of Romania on the market in 2010
		(1000' Euros)	(tons)	(%)	(%)	(%)	(%)	-
12	Poland	23,394	11,621	39	39	50	2.1	CN, BG, UA, DE, UK RO – 5
13	Indonesia	21,444	15,595	108	122	117	1.9	CN, AU, US, VN, TH -
14	Austria	18,008	6,327	20	6	10	1.6	DE, HU, AR, ES, BR RO – 5
15	Sweden	13,752	3,972	24	12	9	1.2	FR, DK, DE, BE, ES RO – 6
16	Russian Federation	12,054	5,375	145	99	165	1.1	UA, KG, MD, AT, CN -
17	Hong Kong, China	11,963	2,900	22	4	29	1.1	NZ, CN, AU, DE, MY -
18	Denmark	11,601	4,403	14	1	4	1.0	DE, HU, BE, ES, PL -
19	Australia	10,901	3,324	36	51	-17	1.0	NZ, AR, CN, CA, TR -
20	Canada	10,642	3,277	9	-7	-23	0.9	AU, AR, BR, US, NZ RO – 16
21	Singapore	7,877	2,175	16	-2	9	0.7	NZ, AU, CN, TH, MY RO – 27
22	China	7,229	2,189	53	28	80	0.6	NZ, AU, TH, DE, CA RO – 23
23	Malaysia	7,147	7,914	21	33	2	0.6	CN, NZ, AU, TH, US -
24	Slovakia	6,507	1,457	11	-14	278	0.6	OE, CZ, UA, DE, HU -
25	Greece	6,393	1,951	6	-6	-11	0.6	ES, DE, BG, BE, NL RO – 9
26	Ireland	6,018	1,558	10	-9	-4	0.5	UK, DE, AR, NZ, AU -
27	Czech Republic	5,588	2,172	11	-1	19	0.5	DE, BG, ES, UY, UK -
28	United Arab Emirates	5,241	1,797	2	1	-11	0.5	DE, AU, US, CN, IN -
29	Finland	4,854	1,286	23	6	18	0.4	DK, DE, BE, AR, HU -
30	Portugal	3,948	1,230	15	3	7	0.3	ES, DE, FR, CN, IE -

Notes: RO – Romania; AR – Argentina; MX – Mexico; CL – Chile; UY – Uruguay; ES – Spain; BR - Brazil; VN – Vietnam; IN – India; CA – Canada; NZ – New Zealand; CN – China; DE – Germany; HU – Hungary; FR – France; BE – Belgium; PT – Portugal; AT – Austria; YE – Yemen; AU – Australia; US – USA; GR – Greece; NL – Netherlands; PL – Poland; BG – Bulgaria; MY – Malaysia; TH – Thailand; UK – United Kingdom; UA – Ukraine; MD – Moldova; KG – Kyrgyzstan; DK – Denmark; TR – Turkey; OE – Other European countries

■ Annual average growth rate in value between 0 – 20%, 2006 - 2010

■ Annual average growth in value between 20 – 50%, 2006 - 2010

■ Annual average growth rate in value over 50%, 2006 - 2010

Source: ITC/UNCTAD/WTO Trademap, CRPCIS – data processing

Based on the annual average growth of world demand, potential markets to absorb Romanian exports of honey could be classified into three main categories:

- Markets with an annual growth rate of demand of over 50%: Croatia, Russia, Indonesia, FYR Macedonia, Ukraine, Latvia, Belarus, Mexico, China, Lithuania, Vietnam;
- Markets with an annual growth rate of demand between 20 – 50%: Bulgaria, Poland, Bahrain, Estonia, Australia, Philippines, Mauritius, Tunisia, Thailand, India, Mongolia, Belgium, Cyprus, Kazakhstan, Argentina, Sweden, Israel, Finland, Algeria, Italy, Hong Kong, Malta, Malaysia, Korea, Austria, Macao;
- Markets with an annual growth rate of demand between 0 – 20%: Morocco, Switzerland, Norway, France, Maldives, Germany, Singapore, Netherlands, Portugal, Denmark, Slovenia, Montenegro, USA, Japan, Bosnia-Herzegovina, Ecuador, Yemen, UK, Spain, Slovakia, Czech Rep., Iceland, Ireland, Oman, Canada, Jordan, Luxembourg, Saudi Arabia, Greece, Taiwan, Kuwait, UAE, South Africa.

There is also potential for strengthening the main European export markets like Italy, Belgium, Austria, Poland, Sweden and Finland, but also for entering new markets like the Baltic countries (Latvia and Lithuania) which are experiencing a growing import demand.

Regarding access to potential third markets, it should be noted that most countries outside the European Union (EU) apply import duties for honey originating in the EU, as it follows below:

Tariffs applied by third countries importing honey from European Union

Importer	Tariffs applied in 2012		Importer	Tariffs applied in 2012	
	Preferential tariff for EU	MFN		Preferential tariff for EU	MFN
Croatia	1	1	Tunisia	-	36%
Russia	-	15%	Thailand	-	30%
Indonesia	-	5%	India	-	60%
Macedonia, FYR	45%	45%	Kazakhstan	-	15%
Ukraine	-	13%	Israel	2	2
Belarus	-	15%	Algeria	-	30%
Mexico	0%	20%	Hong Kong	-	0%
China	-	15%	Malaysia	-	0%
Jordan ³	3.75%	15%	South Korea ⁴	20%	20%
Bahrain	-	5%	Vietnam	-	10%
Australia	-	0%	Morocco ⁵	49%	49%
Philippines	-	7%	Switzerland	38.0 CHF/100 gross kg	38.0 CHF/100 gross kg
Mauritius	-	0%	Norway	24.47 NOK/kg	24.47 NOK/kg
UAE	-	5%	Montenegro	15%+0.12 EUR/kg	30%+0.25 EUR/kg
Singapore	-	0%	Kuwait	-	5%
Bosnia-Herzegovina	5%+1,0 BAM/kg	5%+1,0 BAM/kg	USA	-	1.9 cents/kg

Importer	Tariffs applied in 2012		Importer	Tariffs applied in 2012	
	Preferential tariff for EU	MFN		Preferential tariff for EU	MFN
Japan	-	25.5%	Yemen	-	25%
Ecuador ⁶	-	30%	Iceland	-	0%
Oman	-	5%	Canada	-	0%
Saudi Arabia	-	5%	South Africa	2.86% of FOB value	22% of FOB value

Notes: MFN – Most Favoured Nation clause

- ¹⁾ a) packings of a net weight not exceeding 25 kg:
- import duty within tariff quota of 20 tons is 0%
 - off-quota and MFN import duty is 10%+40.1 EUR/100 kg but no more than 25%
- b) other packings:
- import duty within tariff quota of 20 tons is 0%
 - off-quota and MFN import duty is 10%+49.0 EUR/100 kg but no more than 25%
- ²⁾ a) packings of a weight exceeding 1.5 kg but not exceeding 50 kg:
- import duty within the tariff quota of 180 tons is 0%
 - off-quota and MFN import duty is 11.73 ILS/kg but no more than 255%
- b) packings of a weight exceeding 50 kg:
- import duty within the tariff quota of 300 tons is 0%
 - off-quota and MFN import duty is 11.08 ILS/kg but no more than 255%
- c) other packings:
- import duty within the tariff quota of 180 tons is 0%
 - off-quota and MFN import duty is 17.08 ILS/kg but no more than 255%
- ³⁾ for honey imported by infant food manufacturers import duty is 0% for EU and MFN
- ⁴⁾ import duty within tariff quota of 20 tons is 0%
- ⁵⁾ import duty within tariff quota of 100 tons is 34.3%
- ⁶⁾ in containers of a capacity of 300 kg or more, import duty is 15%

Source: EU Market Access Database



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