



Review Article

CURRENT HONEY MARKET IN INDIA - VOLUME AND VALUE

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ABSTRACT

Honey is known for its dietary as well as medicinal uses in India. India was leading the global honey business till the colonial rule took over the honey into its hands. The beehives were traditionally harvested till 19th century and Europeans as well as British introduced beekeeping in India. Since then, beekeeping has become another way of livelihood for the rural communities and tribes. However, the activity remains unorganized for various reasons including logistics and migration. Gradually, National Bee Board was established and recently National Beekeeping and Honey Mission is launched. It is estimated that more than 5 lakh farmers / beekeepers are associated with the honey production in this country. The data on the volume and value of honey is still missing therefore an attempt has been made in this paper by using the top to bottom approach. This data would help the traders as well as the government to focus on the financials of honey trade.

INTRODUCTION

Honey beekeeping and honey trade are one of the unorganized segments in India. Traditionally honey was harvested from wild / forests. In 19th century, Europeans and British have introduced beekeeping and European honeybees (*Apis mellifera*). The native honeybees (*Apis cerana*) yield less honey and therefore the European honeybees have been preferred. Today some pockets of Northeast and South India have *Apis cerana*. In Nepal we come across *Apis dorsata* honey which is valued very high. The tribes across the country are still harvesting honey from the forest and bee boxes are provided to the beekeepers by National Horticultural Mission. Several training programs have been taken up under various programs and today India has large number of human resources trained in honey beekeeping. The honey beekeeping is also providing livelihood to local communities as well as to the traders.

Global Honey Market

As of 2016, the global honey market was valued approximately fifty thousand crore rupees or seven billion USD. India was the country with the highest number of beehives, at around 12 million, followed by mainland China and Turkey. In comparison, United States alone had about 2.8 million beehives^[1]. Global production of honey is nearly 18000 metric tons of which China has the maximum of 28% production. Turkey, Iran and US produce 5.9%, 4.5% and 4.1% respectively. India accounts for 3.5% of global production and is in 6th place. The expected combined annual growth rate (CAGR) of honey market is around 4.8%. Honey is viewed as a potential replacement for table sugar. It is further specified as acacia, alfalfa, buckwheat, clover honey and wildflower as per the source of honey.

Non-Tariff Measures (NTMs) applied in honey: Maintaining the quality standards and avoiding the possible adulteration are crucial in Honey production and marketing. The Codex Alimentarius Commission is an international body established jointly by Food and Agriculture Organisation (FAO) and World Health Organisation (WHO) to protect consumer health and fair trade practices. It has laid down 15 parameters on honey standards. Some of them are- moisture content (except heather honey) to be not more than 20%, Sucrose content to be not more than 5% etc. (International Centre for Integrated Mountain

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Development-ICIMOD, 2012). NTMs in EU and US regions are stricter than CODEX. Similarly in the case of honey, their NTMs seem stricter than CODEX safety guidelines. While EU member countries do import honey, for regulating residues in honey, they have set provisional MRLs like 25ppb for oxytetracycline, 0.3ppb for chloramphenicol and 1.0ppb for nitrofurans. [2]

Domestic Honey Market

The Indian honey market was valued at INR 19.2 billion (Rs. 1920 Cr) in 2020. The Indian honey market was worth INR 17.29 billion in 2020. The market is further expected to grow at a CAGR of about 10% between 2021 and 2026 to reach a value of nearly INR 30.6 billion by 2026.[3]

Table 1: Year-wise details of Honey Production for last 6 years (2012-13 to 2017-18) - estimated by NBB[4]

| Sl. No. | Year | Production in thousand MTs | percentage of growth | Value in Rs. Cr |
|---------|---------|----------------------------|----------------------|-----------------|
| 1 | 2011-12 | 68.87 | 5.00% | 978 |
| 2 | 2012-13 | 72.30 | 5.00% | 1027 |
| 3 | 2013-14 | 76.15 | 5.33% | 1082 |
| 4 | 2014-15 | 80.53 | 5.75% | 1144 |
| 5 | 2015-16 | 88.90 | 10.39% | 1263 |
| 6 | 2017-18 | 94.50 | 6.30% | 1342 |
| 7 | 2018-19 | 105.00 | 11.11% | 1491 |
| 8 | 2019-20 | 117.60 | 12% | 1669 |
| 9 | 2020-21 | 135.24 | 15% | 1920 |

NOTE: The volume data is available with NBB from 2011-12 to 2020-21. The volume for 2011-12 and 2021-22 has been estimated basis the previous FYs. The value data extrapolated based on STATISTA report for the FY 2020-21 according to which honey market size was Rs. 1920 Cr. YOY % growth (both volume and value) is calculated from the available data. The volume growth varies between 15 to 16% while the value growth is about Rs. 124 to 125 Cr per annum on average. This included both domestic as well as export. As per the estimation of NBB, 50% and 50% is the ratio of trade between domestic and exported volume of honey [5].

EXPORT & IMPORT OF HONEY:

India is one of the largest honey producing and exporting countries in the world. In the year 2017, India exported honey worth of USD 80.52 million. In export import business, honey is mainly classified under HS Code 04090000. Mustard honey, lychee honey, eucalyptus honey, Pongamia honey, sunflower honey, multi-flora Himalayan honey, acacia honey and wild flora honey are some of the major varieties of Natural honey produced in India.

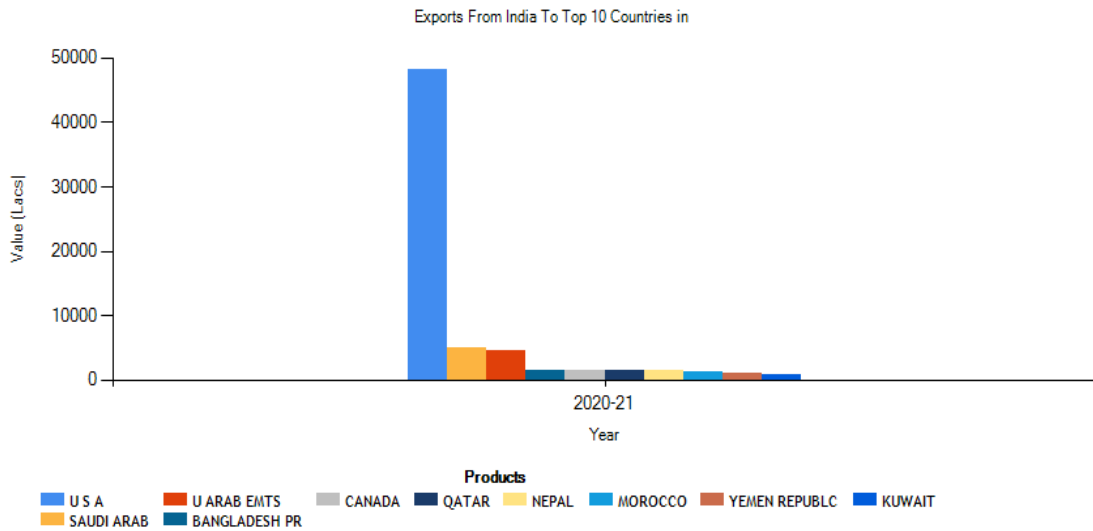
Honey Export Partners of India

India exports honey to the more than 65 countries all over. United States is the biggest importer of honey majorly from India and recorded 79.71% of the total value during 2017. Shipments more than 55 exporters from various Indian states like Delhi, Rajasthan and Maharashtra of various types of honey are exported predominantly to USA. Some of the other major countries like Saudi Arabia, United Arab Emirates, Bangladesh and Canada are honey export partners of India. [6].

| Country | Value (USD Million) | Value (%) |
|--------------|---------------------|-----------|
| USA | 64.18 | 79.71% |
| Saudi Arabia | 4.37 | 5.43% |
| UAE | 2.66 | 3.31% |
| Bangladesh | 1.64 | 2.05% |
| Canada | 1.51 | 1.87% |

Export Genius - 13 April 2018

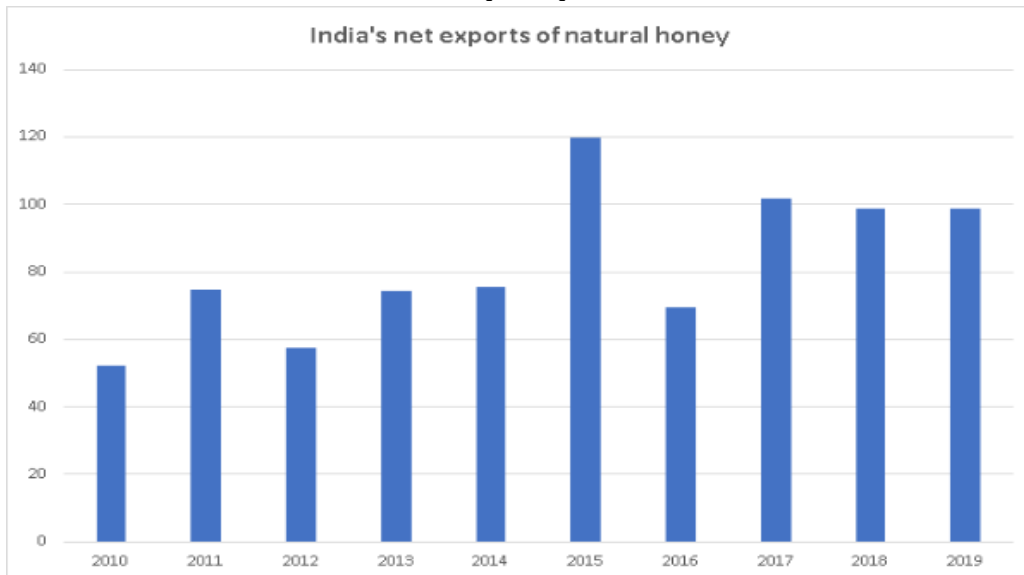
The total export of honey from India during 2020-21 is 59,999.23 MT which is worth of INR 72,113.24 lacs [7,8]. Globally, Major exporters of honey are China, New Zealand, Argentina, Germany, Ukraine, India and Spain, while major countries importing the honey include US, Germany, Japan, France, UK, Italy and China.



Source: DGCIS Annual Export, Ref: APEDA AgriXchange

Indian Production of Honey was 65,000 MT (approx.) in the year 2001-02 while the export and domestic consumption of honey were 50% and 50% respectively. Over the years, India is becoming an increasingly important exporter of high quality, mild honey with versatility for the North American market. This has contributed significantly to the livelihood of approximately 2,50,000 beekeepers. [9]

By value, during the last decade, India has proliferated its honey exports from 56.2 million USD to 100.8 million USD at growth rate of 6.5% per annum. This is higher than the world's exports growth. Also, India brought down imports to 1.9 million USD in 2019 with 1.2% fall in imports per annum.



Source: ITC Trade map, 2020, figures in US\$ million

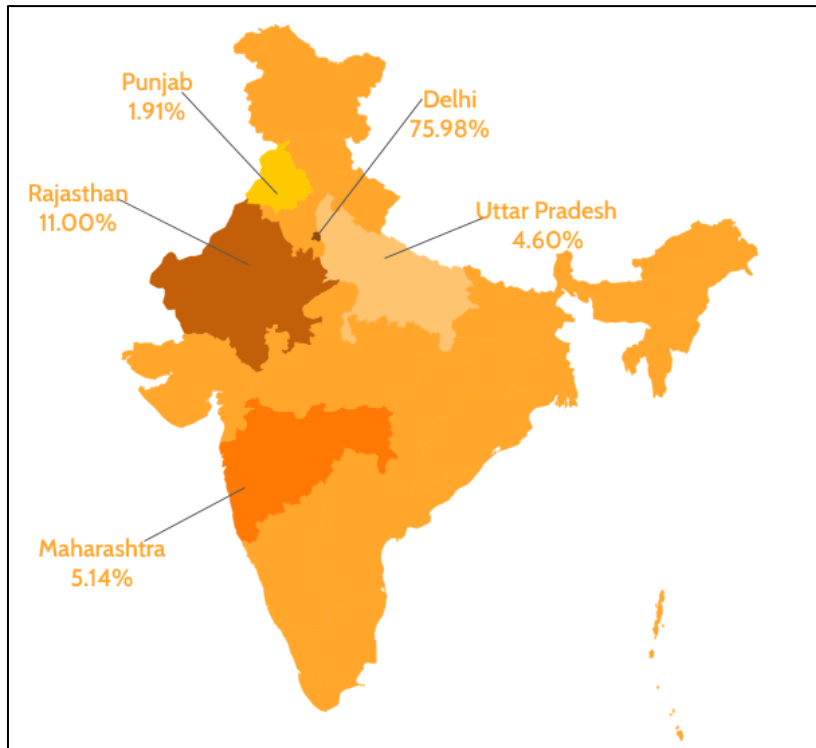
The Bibek Debroy led committee report released last year estimates the bee keeping potential of India at 200 million bee colonies as compared to 3.4 million bee colonies presently suggesting the huge opportunities in bee keeping.

State wise export potential in India

According to honey export data, 17 states of India are currently exporting natural honey to various countries across the world. Among them, Delhi is the largest with 75.98% value of the honey shipments to the global market, followed by Rajasthan, Maharashtra, Uttar Pradesh and Punjab. However, on honey production, West Bengal, Uttar Pradesh, Punjab and Bihar are in the top places as honey producing states of the country. Table No. 2 shows the top states to export honey export in 2017.

Table showing distribution of honey export

| Indian State | Value (%) |
|---------------|-----------|
| Delhi | 75.98% |
| Rajasthan | 11.00% |
| Maharashtra | 5.14% |
| Uttar Pradesh | 4.60% |
| Punjab | 1.91% |



Map showing distribution of honey exports Breakup by State

As for as production units set up in states in concerned, Maharashtra have most of the manufacturing facilities and is in the leading position in the market. Some of the other major states include Tamil Nadu, Karnataka, Punjab, and Rajasthan.^[10]

Major exporters and importer nations of natural honey

| Exporters | | Importers | |
|-------------|-------------------------|-----------|-------------------------|
| Economies | Values, in US\$ Million | Economies | Values, in US\$ Million |
| World | 1,990.5 | World | 2,012.4 |
| China | 235.31 | US | 430.08 |
| New Zealand | 228.77 | Germany | 249.61 |
| Argentina | 146.70 | Japan | 144.52 |
| Germany | 131.49 | UK | 139.39 |
| Ukraine | 113.04 | China | 111.15 |
| India | 100.87 | Italy | 84.90 |

Source: ITC Trade Map, 2020, figures in US\$ million ^[11]

Top ten producers of honey

| Rank | Economies | Production Values |
|------|-----------|-------------------|
| 1. | China | 489.400 |
| 2. | Turkey | 105.000 |
| 3. | Iran | 80.500 |
| 4. | US | 73.440 |
| 5. | Russia | 69.760 |
| 6. | India | 63.700 |
| 7. | Ukraine | 59.300 |
| 8. | Mexico | 55.400 |
| 9. | Argentina | 51.370 |
| 10. | Ethiopia | 47.700 |

Source: Statista 2020, figures in metric tons ^[12]

Top consumers of honey in the world

| Rank | Country | Daily grams of honey consumed per capita |
|------|--------------------------|--|
| 1. | Central African Republic | 9.62 |
| 2. | New Zealand | 5.55 |
| 3. | Slovenia | 4.4 |
| 4. | Greece | 4.24 |
| 5. | Switzerland | 3.87 |
| 6. | Austria | 3.62 |
| 7. | Turkey | 3.33 |
| 8. | Ukraine | 3.15 |
| 9. | Slovakia | 3.02 |
| 10. | Montenegro | 3.01 |

Source: FAO

In terms of per capita honey consumption per day, Central African Republic has the highest with 9.62 grams consumed per day, followed by New Zealand and Slovenia. In Asia, Japan is the biggest consumer with per capita consumption of up to 2 pounds per year. India has the per capita honey consumption as low as 50 grams per year; globally, it ranges from 250-300 gm. ^[13]

Competitive Landscape

The honey market in India is highly diversified in nature owing to the presence of a large number of manufacturers and various types of honey available. The leading companies in the Indian honey market as per the report are as below^[14].

- Dabur
- Patanjali
- Apis India
- Emami Limited
- Hitkary Pharmacy Private Limited

- Reliance Retail Limited
- Shree Baidyanath Ayurved Bhawan Pvt. Ltd.
- Kejriwal Bee Care India Pvt. Ltd.
- Bharat Honey
- Under The Mango Tree

DISCUSSION

Bee colony is an artificial method of producing honey by housing bee hive in frames in boxes. These groups of honey bees have more than seven thousand worker bees and one or few queen bees. Once there is a new queen bee, the process of construction of a new hive begins. Using the frames, these new hives are created. The behaviour of bees has been studied well and the process of honey production is an amazing phenomenon of nature’s engineering.

Honey bees reproduction also has cycles including from a larva to pupil to an adult worker honeybee that usually takes about 3 weeks. Around 10,000 bees with a queen bee start the new

hive. The weight of all these bees is about 2.5 to 3 pounds.

Some of the facts about honey production are very interesting and amazing. Each beehive can produce about 20 kg of honey per year and it takes nectar from nearly 1 million flowers and 50,000 bee flights to produce one kg honey. Worldwide, there are more than 300 mono-floral honey types and ranges in colour – from water white to dark brown/black. An average bee makes about 2-3ml of honey in its lifetime. At the peak of the honey-gathering season, a strong, healthy hive will have a population of approximately 50,000 bees. With a traditional beehive setup, a strong hive could produce up to 100 lb (45kg) of harvestable honey per hive. But considering unforeseen factors which can affect colonies, a better average would be anywhere between 14 to 27kg per hive.

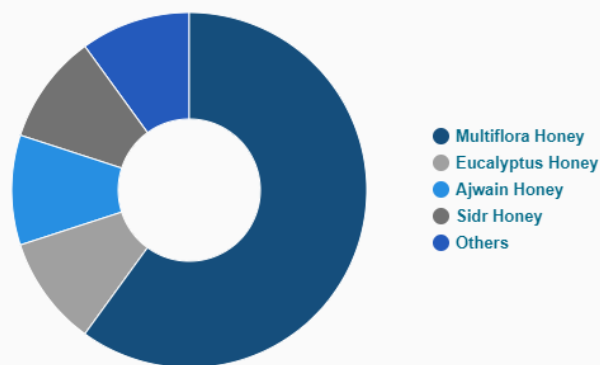
Honey harvesting usually can be twice or thrice a year for most of bee keepers. The yield per harvest and harvesting period may be influenced by seasons. Given the estimated demand and potential for the honey in coming future, efforts to improve bee production, floral habitats addressing quality issues and promoting innovations in bee keeping techniques will fetch dividends in terms of revenues and livelihood for farmers and rural sectors.

Indian manufacturers and stakeholders must focus on efforts to its honey production, given the untapped possibility of 200 million bee colonies as well as surge in demand post-Covid times.

The increased awareness on health and wellness in general public all over the globe will be an important driving factor in the growth of export market for Indian honey. Both the value and volume are important aspects when it comes to honey market both domestic and international. As a healthy natural sweetener, as an age old household remedy for common ailments, as a food ingredient and also in confectionaries, honey has a unique place in both industrial and domestic uses.

Honey use in food & beverage category dominates the market that further increased during the COVID phase owing to the increase in general awareness on immunity benefits of honey. This segment is expected to grow further at a CAGR of 7.26% during 2020-2025. Over the past decade, global trade of honey grew from 1.5 billion USD to 2.02 billion USD, registering a growth rate of 3.75%^[15].

Indian Feed Additives Market Share, By Flavor (in INR Million)



www.imarcgroup.com

Source: imarcgroup.com

Beekeeping is one of the oldest activities in India. This makes it one of the leading honey markets in the world which has created an intense competition in terms of innovation and cost. Globally 17,79,600 MT (approx.) of honey is produced. Out of which India contributes volume of 1,35,240 MT of honey at a value of INR 1,920 Cr by FY 2020-21 (Ref. NBB). Out of this volume about 50% (i.e., 59,999 MT) is exported which has a value of INR 721.14 Cr (Ref. DGCIS).

CONCLUSION

The demand for honey in India is augmenting on account of COVID-19 as well as due to the growing consumer preference for natural and healthy alternatives of artificial sweeteners, rising awareness regarding the benefits of honey and increasing popularity of various honey flavours. In addition, owing to its proven anti-inflammatory, anti-bacterial and anti-microbial properties, honey is projected to gain a momentum in both the food and non-food applications across the country. The efforts of Govt. of India through NBHM (National Beekeeping and Honey Mission) under Atmanirbhar Bharat Abhiyan will help in improving the income of the farmers and provides livelihood also.

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