

The Honey Market in China: Opportunities and Hurdles for European Producers

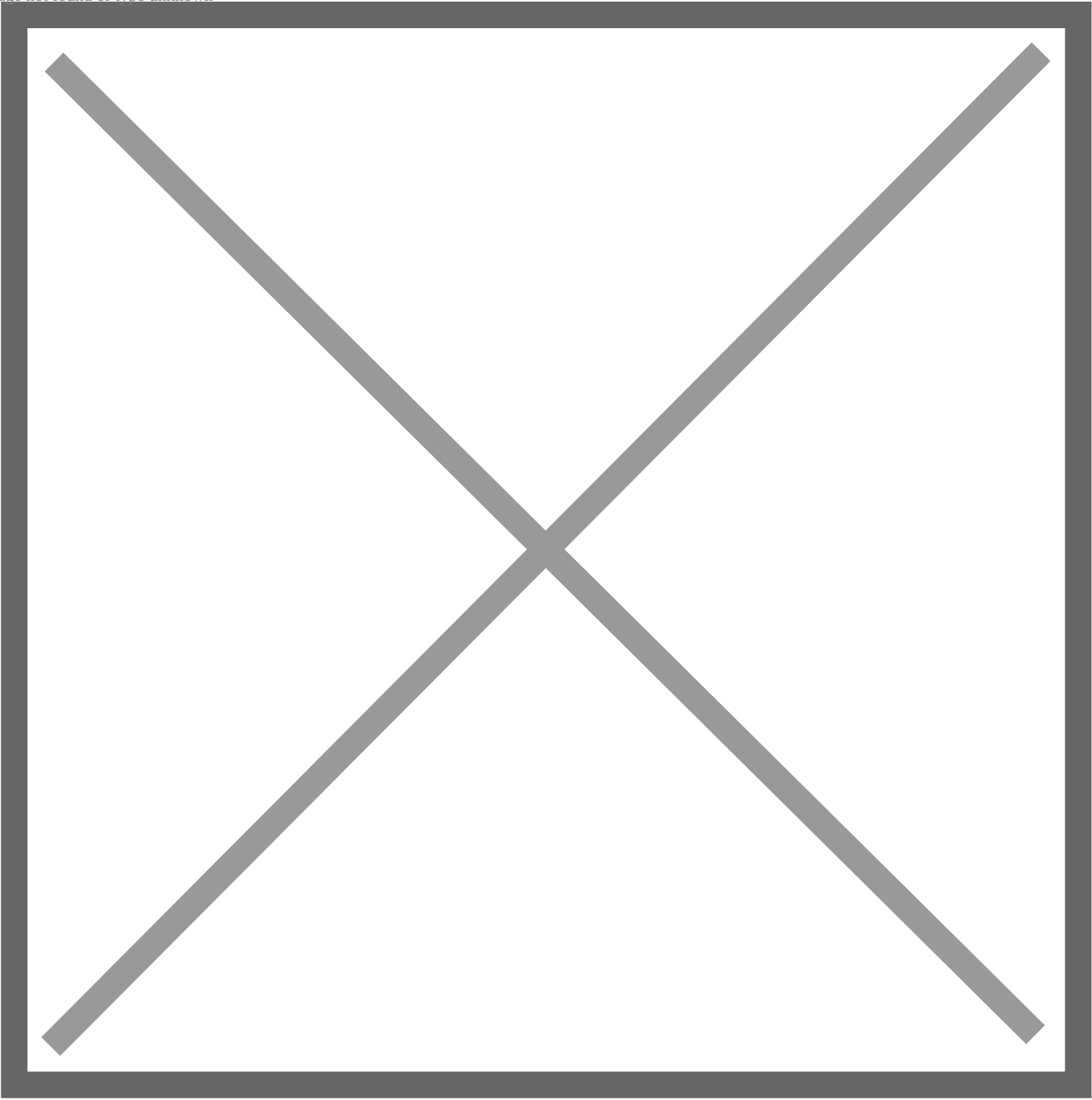
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China plays a prominent role within the global honey supply chain. With an output of 440 490 tonnes in 2025,^[1] the country is the world's largest honey producer, accounting for approximately 23% to 25% of global production.^[2] While this picture may suggest a market largely dominated by domestic players, a closer look brings into focus a more nuanced and complex reality.

On the trade front, China exported 175 500 tonnes of natural honey in 2025 (roughly 40% of the country's overall output), marking a steady 3,5% increase year-on-year and signalling a significant outward orientation.^[3] The United Kingdom, Japan, and Belgium ranked as the top three destination markets, together absorbing 57% of China's total honey exports.

Such pronounced inclination towards foreign markets is mainly driven by two domestic factors: sluggish consumption and a quality gap. Chinese people consume considerably less honey than their Western counterparts – approximately 50g per capita annually, compared to up to 1 500g in Europe and the United States^[4] – leading domestic producers to rely substantially on international markets to absorb their output. This low consumption is partly rooted in a combination of cultural and health factors. Historically viewed more as a medicinal tonic than an everyday food, honey has struggled to establish itself as a mainstream dietary staple. Furthermore, an ageing population reducing its consumption of high-sugar foods further constrains the potential for a large-scale uptake.

On the other hand, growing domestic demand for high-quality, unadulterated bee products remains largely unmet by local producers. The domestic pool of players is fragmented, lacking strong brands capable of building consumer trust, while a legacy of quality scandals has further eroded confidence in locally produced honey. As a result, Chinese manufacturers often fall short of the appeal, quality standards and product diversity needed to compete in the premium segments of the honey market.

Import figures are even more telling on the gap left open to foreign competitors. Despite a trade balance heavily skewed towards exports, China imported USD 48,3 million worth of honey in 2024, for a volume of 3 172 tonnes at an average unit price of roughly USD 15 200 per tonne.^[5] To put this in perspective, Chinese honey exports in the same year averaged just USD 1 560 per tonne. This tenfold price gap underscores the perceived quality and brand equity that international players command in the eyes of Chinese consumers.^[6] In this context, European companies have an opportunity to strengthen their presence in the Chinese market. However, doing so requires navigating China's strict regulatory framework and facing fierce competition from well-placed international players.

Regulatory Framework

The regulatory framework for honey imports is structured across two main levels, governing respectively product classification and import requirements. Honey is classified under the national product standard GB 14963-2011,^[7] issued in 2011 and administered by the National Health Commission (NHSC) and the State Administration for Market Regulation (SAMR). This standard establishes a clear definition of honey, its composition requirements and safety limits, legally

distinguishing pure honey from honey-based products, the latter being governed by a separate, less centralised set of standards.

Honey imports are regulated by a set of requirements under the oversight of the General Administration of Customs of China (GACC). Some of these apply to most food products; others are specific to honey. As a broad regulatory framework, GACC's recent Decree No. 280^[8] requires all foreign food production facilities to be registered in GACC's China Import Food Enterprises Registration (CIFER)^[9] portal.

Importantly, honey is classified as a high-risk product. Exporting honey to China therefore requires two distinct steps. First, there needs to be a specific bilateral agreement between China and the manufacturer's home country, a condition *sine qua non* for shipping honey into the Chinese market. Second, an official recommendation from the home country's competent authority is needed to support the company's registration process with CIFER. In practical terms, this means that a European honey producer cannot apply directly to CIFER. Instead, it must first pass a preliminary evaluation by its national competent authority, which verifies that the facility meets Chinese standards prior to submission. To date, 15 out of 27 EU Member States have a valid bilateral agreement with China for honey export.^[10]

Another option that allows European honey to access the Chinese market is cross-border e-commerce (CBEC). With CBEC, EU manufacturers can sell directly to Chinese consumers through an online store on a cross-border e-commerce platform (primarily TMall Global and JD Worldwide), without the need for pre-market access product filing, registration or certification.^[11] However, CBEC is a strictly business-to-consumer (B2C) channel, allowing purchases by individual consumers only. It is also subject to purchasing limits in value – currently set at RMB 5 000 per transaction and RMB 26 000 per consumer per year.^[12]

International Players and European Positioning

China's honey market hosts a few major international players. At the very top, New Zealand leads by a wide margin, accounting for 43% of import volume in 2024, with its Manuka honey commanding a strong position in the premium segment. Russia and Thailand follow, accounting for 18% and 17%, while Australia rounds out the top four with a 9% share.

Shift the focus to value, however, and the picture changes. New Zealand's share jumps to nearly 73%, while Australia ranks second with approximately 15% of total imported value, far ahead other honey exporters.^[13] This reversal highlights the privileged position of these two countries, which leverage their zero-tariff access to the Chinese market to position themselves as leaders in the premium honey segment.^[14]

Against the backdrop of competitors benefitting from free trade agreements (FTAs) with China, European manufacturers, who have to contend with tariffs of 15%, cannot rely on price nor volume advantages. Nonetheless, they can still carve out a profitable niche by taking advantage of their unique assets: centuries-old beekeeping traditions, a rich diversity of terroirs, and the unmatched rigour of EU food safety standards. From the lavender fields of Provence, to the chestnut forests of

Italy and the thyme-covered hills of Greece, European honey producers can draw on authenticity and origin to offer a range of flavours that Chinese premium consumers increasingly seek.

The growing demand for premium honey has not gone unnoticed at the domestic level either. The Chinese government recently released a new recommended standard (GB/T 47735-2026)^[15] aimed at reorienting domestic honey production towards higher-quality outputs. Yet the gap remains significant, both in terms of Chinese producers' ability to meet the standards required to compete in the premium segment, and in terms of the tradition and global reputation that international competitors enjoy, which constitutes the true soft power of European brands.

That being said, European exports to China remain modest when compared to other international players. Germany leads with 31,54 tonnes in 2025, followed by France (23,93 tonnes) and Spain (13,55 tonnes).^[16] EU honey producers have the potential to strengthen their presence by riding the growing demand through the uniqueness of their product variety. However, this endeavour requires a well-defined entry strategy, the use of marketing channels that resonate with Chinese consumers, and a careful assessment of local preferences, so as to effectively leverage the competitive advantage of their offerings.

^[1] [National Data – Annual Data \(Honey Output 2025\)](#), National Bureau of Statistics of China, accessed 17 August 2026.

^[2] [FAOSTAT Statistical Database – Honey Production](#), Food and Agriculture Organization of the United Nations, accessed 17 August 2026.

^[3] [Analysis of China's Bee Product Export Situation in 2025](#), China Bee Products Association, 30 January 2026, accessed 18 August 2026.

^[4] [2025 Annual Report on the Development of the Bee Industry and Technology](#), Chinese Journal of Animal Science, 4 March 2026, accessed 18 August 2026.

^[5] [UN Comtrade Database – Honey Imports \(HS 0409\)](#), United Nations, accessed 19 August 2026.

^[6] [Customs Statistics Online Query Platform](#), General Administration of Customs of the People's Republic of China, accessed 31 August 2026.

^[7] [Standard number: GB 14963-2011](#), National Food Safety Risk Assessment Center, 20 April 2011, accessed 20 August 2026.

^[8] [Order of the General Administration of Customs on the Promulgation of the 'Regulations on the Registration and Management of Overseas Production Enterprises of Imported Food by the People's Republic of China'](#), General Administration of Customs of the People's Republic of China, 16 October 2025, accessed 21 August 2026.

^[9] [China Import Food Enterprises Registration](#), General Administration of Customs of the People's Republic of China, accessed 21 August 2026.

[10] The EU Member States with a currently valid bilateral agreement for honey export to China are Estonia, Austria, Bulgaria, Poland, Denmark, Germany, France, Latvia, Romania, Portugal, Slovenia, Spain, Greece, Hungary, Italy. See [List of Countries and Regions Eligible to Export Bee Products to China](#), General Administration of Customs of the People's Republic of China, accessed 21 August 2026.

[11] The CBEC channel is only available for products included in the so-called "Positive List" (officially the *Catalogue of Products Authorised for Retail Import via Cross-Border E-Commerce*). The list currently comprises 1,476 types of goods, mostly consumer goods, including F&B products. For a detailed overview of CBEC, see [Selling to China via Cross-Border E-Commerce](#), EU SME Centre, 9 March 2023, accessed 27 August 2026.

[12] [Ibid.](#)

[13] [UN Comtrade Database – Honey Imports \(HS 0409\)](#), United Nations, accessed 21 August 2026.

[14] [China-New Zealand Free Trade Agreement](#), Embassy of the People's Republic of China in New Zealand, accessed 24 August 2026; [ChAFTA Outcomes at a Glance](#), Department of Foreign Affairs and Trade (DFAT), accessed 24 August 2026.

[15] [Standard Number: GB/T 47735-2026](#), National Standard Information Public Service Platform, 25 May 2026, accessed 24 August 2026.

[16] [Access to Market – EU Trade Statistics \(HS 0409\)](#), European Commission, accessed 27 August 2026.