STRATEGIES TO BOOST INDIA'S HONEY EXPORTS

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SUVANGI RATH | TANMOY ADHIKARY | ASHOK GULATI

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ABBREVIATIONS

AAGR	Average Annual Growth Rate
APEDA	Agricultural and Processed Food Products Export Development Authority
C	Celsius (temperature)
CAGR	Compound Annual Growth Rate
CBIC	Central Board of Indirect Taxes and Customs
CBRTI	Central Bee Research and Training Institute
CFS	Container Freight Station
COVID	Coronavirus Disease
DGFT	Directorate General of Foreign Trade
DH	Department of Horticulture
DMSME	Department of Micro, Small and Medium Enterprises
DNA	Deoxyribonucleic Acid
EC	European Commission
EIC	Export Inspection Council (India)
EU	European Union
FAO	Food and Agriculture Organization of the United Nations
FAOSTAT	Food and Agriculture Organization Statistical Database
FAS	Financial Assistance Scheme (APEDA)
FPO	Farmer Producer Organization
FY	Fiscal Year

GAIN	Global Agricultural Information Network (USDA)
GI	Geographical Indication
GRFL	Gateway Rail Freight Limited
GST	Goods and Services Tax
HACCP	Hazard Analysis and Critical Control Points
HMF	Hydroxy-methyl-furfural (indicator of honey quality/freshness)
HS	Harmonized System (of tariff nomenclature)
IBDC	Integrated Beekeeping Development Centre
ICD	Inland Container Depot
ICIMOD	International Centre for Integrated Mountain Development
ICRIER	Indian Council for Research on International Economic Relations
II	Roman numeral for "Two" (used in Mini Mission-II)
III	Roman numeral for "Three" (used in Mini Mission-III)
INR	Indian Rupee
INTA	National Institute of Agricultural Technology (Argentina)
IT	Information Technology
ITC	International Trade Centre
JAS	Japanese Agricultural Standards
KVIC	Khadi and Village Industries Commission
MPI	Ministry for Primary Industries (New Zealand)
MRL	Maximum Residue Limit
MT	Metric Ton

MUSD	Million United States Dollar
NAAS	National Academy of Agricultural Sciences
NABARD	National Bank for Agriculture and Rural Development
NAFED	National Agricultural Cooperative Marketing Federation of India
NBB	National Bee Board
NBHM	National Beekeeping and Honey Mission
NMR	Nuclear Magnetic Resonance (testing for adulteration)
NPC	Nominal Protection Coefficient
NTB	Non-Tariff Barrier
OIA	Open Information Analysis
PIB	Press Information Bureau (India)
PRID	Product Related Import Duty
PROAPI	National Apiculture Program (Argentina)
PTA	Preferential Trade Agreement
QCL	Quality Control Laboratory
RCA	Revealed Comparative Advantage
SENASA	National Service of Agri-Food Health and Quality (Argentina)
SHG	Self-Help Group
SPS	Sanitary and Phytosanitary
STAT	Statistics (commonly used in trade reports)
TE	Triennium Ending
TNAU	Tamil Nadu Agricultural University

TRACES	Trade Control and Expert System (EU)
UAE	United Arab Emirates
UK	United Kingdom
UMF	Unique Manuka Factor
UP	Uttar Pradesh
US	United States
USA	United States of America
USD	United States Dollar
USDA	United States Department of Agriculture
UVP	Unit Value Price

FOREWORD

Apiculture in India lies at a unique intersection of environmental sustainability, rural livelihoods and agricultural trade. Honeybees contribute to food security not only through honey production but also through pollination services that enhance the productivity of crops vital for nutrition and income security. India's honey sector has emerged as a key driver for diversification of agri-exports. With production doubling in the last decade and India ranking among the top producers globally, the sector offers significant opportunities for growth, value addition, and global positioning.

However, there are challenges. Over-dependence on a single floral source, episodes of rejection in premium markets due to quality concerns, tariff and non-tariff barriers, and limited branding of India's rich floral diversity constrain the sector's full potential. Harnessing India's geographical advantages, its unique GI-tagged honeys, and the rising demand for organic and natural sweeteners globally, requires a concerted policy, institutional, and industry effort.

This report, "Strategies to Boost India's Honey Exports," prepared as part of the APEDA–ICRIER Knowledge Partnership is an important contribution marked by mapping sectoral trends, benchmarking global best practices, and outlining actionable pathways to strengthen competitiveness in the global market. The focus on diversification beyond mustard honey, value-chain strengthening, branding of origin-linked varieties, and development of bee by-products is timely for India's ambition to diversify export baskets and seize emerging demand trends.

We hope this study will be a valuable resource for policymakers, exporters, beekeepers, and allied institutions working to transform India's honey sector into a sustainable and globally competitive industry.

SHEKHAR AIYAR
Director & Chief Executive
ICRIER

ABHISHEK DEV
Chairman
APEDA

PREFACE

The study on "Strategies to Boost India's Honey Exports" is undertaken when India's apiculture sector is marked by impressive production growth, growing global recognition, while being exposed to severe market and policy challenges.

Over the past decade, India's honey production has expanded rapidly, from 76,000 tonnes in 2013–14 to an estimated 1.51 lakh tonnes in 2024–25, reflecting an average annual growth rate (AAGR) of 6.5 percent, well above the global average of 1.6 percent. This places India in the top five global producers. On the export front, India from a marginal supplier has become a significant player in world trade. Shipments have grown from USD 66 million in 2010–11 to a peak of USD 206 million in 2024–25. India accounts for 12 percent of the total global honey exports, an achievement built on large-scale beekeeping infrastructure, low-cost production base, and a reputation for natural and residue-free honey.

Despite this performance, there are signs of vulnerability and structural imbalance in India's honey export story. Nearly 80 percent of India's outbound consignments are destined for the United States that dominates India's export basket. In 2024–25, the United States alone absorbed honey worth over USD 160 million, out of India's total honey exports of roughly USD 206 million. This high dependence on a single market exposes Indian exporters to sudden policy shifts and trade actions. The imposition of volatile tariffs by the United States has demonstrated this risk, leading to a decline in new orders and dampened competitiveness compared to Argentina and Vietnam, who face considerably lower tariffs. This policy shock has underscored the urgency for India to diversify its markets and reposition itself in premium export destinations.

The purpose of this report is to analyse India's honey production and export ecosystem, identifying major challenges that constrain export growth; and to propose strategies that will help India pivot towards resilience, value creation, and premium global positioning. Drawing insights from quantitative competitiveness indicators such as Revealed Comparative Advantage (RCA) and Nominal Protection Coefficient (NPC) and insights from field-level consultations with stakeholders, this study underscores that India must move beyond bulk, price-sensitive exports and towards differentiated and value-driven approaches.

This report lays out a multi-pronged strategy for the sector. In the short run, India will have to neutralise the adverse impact of US tariffs by expanding its footprint in alternative markets such as Germany, France, the UK, Japan, South Korea, and the Middle East,

regions where demand for organic, traceable, and GI-tagged varieties of honey is steadily increasing. Reviving export incentives, strengthening marine insurance and logistics support will improve competitiveness. In the medium term, India's focus must shift to building clusters for organic, wild, and GI-tagged honey enhancing farmer productivity to close the yield gap with global competitors such as Argentina (80–100 kg/box compared to India's 40–45 kg/box); diversifying floral sources beyond mustard honey; and tapping the multi-billion-dollar market for hive by-products like beeswax, propolis, pollen, and royal jelly.

By leveraging its biodiversity, investing in accredited testing infrastructure (including Nuclear Magnetic Resonance (NMR) capabilities), and building strong branding and traceability systems, India can elevate its honey exports from low-value, bulk commodity trade to high-value, branded, and consumer-trusted products. Such a transition will safeguard export earnings against tariff shocks and generate sustainable income for millions of rural beekeepers, support ecological services through pollination, and strengthen India's agricultural trade basket.

AUTHORS

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EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

INDIA'S HONEY SECTOR: GROWTH AND GLOBAL STANDING

India has emerged as a major honey producer and exporter in the last decade, leveraging its rich biodiversity and expanding apiculture infrastructure. Honey production has almost doubled from 76,000 tonnes in 2013–14 to about 151,000 tonnes in 2024–25, registering an AAGR of 6.5 percent, much higher than the global average of 1.6 percent.

India hosts over 3.4 million bee colonies, producing a range of monofloral and multifloral varieties, alongside growing segments of GI-tagged honeys such as Sundarban and Ramban Sulai honey.

On the trade front, India has become the 4th largest global exporter, accounting for 12 percent of global honey exports. Export earnings grew from USD 66 million in 2010–11 to over USD 206 million in 2024-25.

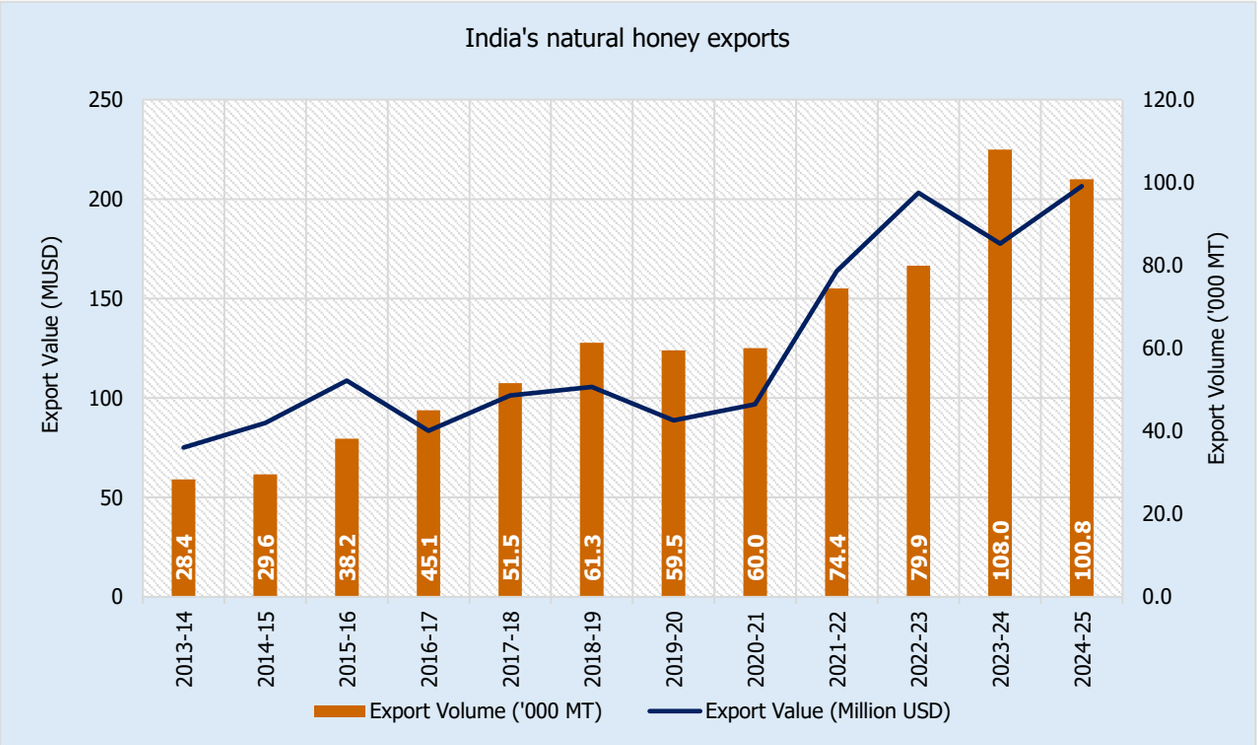
EXPORT PROFILE AND MARKET DEPENDENCE

Export Orientation: Roughly two-thirds of India's honey production is exported, reflecting high integration with world markets.

Market Concentration: The USA absorbs 82 percent of the exports (worth over USD 160 million in 2024–25 out of the USD 206 million total). The UAE, Saudi Arabia, and Qatar make up much smaller shares.

Export Volumes: India exports about 100,000–110,000 tonnes annually, though largely in bulk form for industrial use rather than in branded or retail-ready formats.

Unit Value Realization: Indian honey fetches USD 2,087/tonne, lower than the global average of USD 3,135/tonne and far below the high-value exporters like New Zealand (USD 21,000/tonne for Manuka honey).



Source: (DGFT, 2025)

This structure leaves Indian exporters vulnerable to shocks from tariff and regulatory actions of dominant buyers.

KEY CHALLENGES IN EXPORT COMPETITIVENESS

1. Tariff and Non-Tariff Barriers

- The US tariff of 10 percent *(as on February 27, 2026)* plus 1.9 cents/kg (MFN) duty has sharply eroded India's competitiveness, making its honey costlier than Argentine and Vietnamese supplies.
- The European Union imposes a 17.3 percent duty alongside strict residue limits, NMR testing, and traceability requirements that are difficult for smallholders to comply with.
- Japan and the UK also levy 25.5 percent and 16 percent tariffs (Zero percent under India – UK CETA from 01st April, 2026) respectively, compared to preferential or duty-free access extended to India's competitors.

2. Production-Side Constraints

- Overdependence on mustard honey (~60–70 percent of output), prone to crystallisation and less favoured in retail markets.
- Low yields: Indian hives yield 40–45 kg/box compared to Argentina's 80–100 kg/box.

- Seasonal gluts, lack of processing/storage infrastructure, and weak farmer bargaining power due to small holding.

3. Value Chain and Institutional Issues

- A fragmented, middlemen-dominated supply chain results lower farm-gate prices (₹100–130/kg vs. retail prices of ₹350–400/kg).
- Limited awareness and extraction of by-products (e.g., beeswax, royal jelly, propolis) despite high commercial value.

4. Reputation and Quality Concerns

- Past rejections in the EU market over residue and adulteration issues have dented the credibility.
- Lack of domestic NMR testing facilities hampers exports to premium markets.

UNTAPPED OPPORTUNITIES

Market Diversification

- Europe (Germany, France, UK): High demand for organic, traceable honeys.
- Japan and South Korea: High-value consumers with preference for natural foods.
- Middle East: Strong diaspora-driven demand and proximity-based logistics advantages.
- Emerging ASEAN Markets: Singapore, Malaysia, Indonesia show potential via wellness-focused consumption trends.

Product Diversification

- GI-Tagged honeys from Sundarbans, J&K, Tamil Nadu for niche branding.
- By-products: Beeswax, propolis, royal jelly & pollen, valued at USD 12.7 billion globally in 2023, projected to reach USD 18 billion by 2032.
- Value-added formats: Honey sticks, infused honey (ginger, turmeric), nutraceutical blends, skincare products.

STRATEGIC ROADMAP

Short-Term Strategies

- Develop marine insurance reforms to simplify claim settlements.

- Launch an awareness campaign: "Honey for Health" under APEDA/FSSAI/AYUSH branding.
- Organise beekeepers into FPOs and build cluster-based processing/testing centres.

Medium-Term Strategies

- Cluster development for organic, GI-tagged and wild honeys, aligned with EU/Japan certification needs.
- Farmer productivity enhancement: exposure visits, advanced apiary technologies, pest/disease control techniques to be introduced.
- Export diversification: target Europe, East Asia, ASEAN to reduce US dependence.
- Build accredited laboratories in India, including NMR testing capabilities, aligned with EU regulations.
- Promote by-product diversification and branding in nutraceutical and cosmetic sectors.
- Develop digital traceability systems (blockchain-based) for ensuring trust and compliance in premium markets.
- Disaggregate ITC HS codes into separate 8- and 10-digit codes, distinguishing bulk vs. retail honey and organic honey, creating separate tariff lines for royal jelly, propolis, and refined beeswax.

CONCLUSION

India's honey industry exemplifies promise and vulnerability. With the rising global demand for natural, traceable sweeteners and bee byproducts, India holds unique advantages in biodiversity and supply potential. Yet, heavy dependence on the US market, productivity gaps, and compliance challenges limit India's export earnings.

The path forward lies in market diversification, value creation, and institutional strengthening, shifting from a bulk-supplier role to a global brand leader in natural and organic honey and hive products. This will safeguard export earnings against tariff shocks and deliver sustainable incomes for millions of rural beekeepers and reinforce India's position in the global agri-trade.

INTRODUCTION

INTRODUCTION

1.1 COMMODITY BACKDROP

Honey is a natural sweetener produced by honey bees from the nectar of flowering plants and is valued worldwide for its nutritional, medicinal and economic properties (El-Din, Farrag, Wu, Huang, & Wang, 2025). The combined nutritional and medicinal qualities make honey a valued component of diets worldwide and a key driver for growing consumer demand in both domestic and international markets.

Pollinators, particularly honeybees, play a critical dual role in global agriculture (Kumar, Kumar, & Kanwar, 2024). As emphasized by FAO Director-General Qu Dongyu, pollinators contribute immense economic value, accounting for almost 75 percent of the global food crop production and 90 percent of flowering plant reproduction, representing an estimated USD 577 billion in crop production annually (Brenna, 2025). Honeybees secure food security through pollination while producing honey, an important natural commodity with nutritional and medicinal qualities.

Beekeeping has deep roots in India's cultural and agricultural history and is mentioned in ancient texts such as the *Rigveda* and *Upanishads* (Mishra, 1995) (Kaushik, 2012). India's rich floral biodiversity, with over 500 nectar and pollen-rich plant species, and diverse indigenous honeybee species such as *Apis cerana indica*, *Apis dorsata*, and others makes India a natural hub for beekeeping and honey production. This enables unique honey varieties with distinct flavours and health benefits.

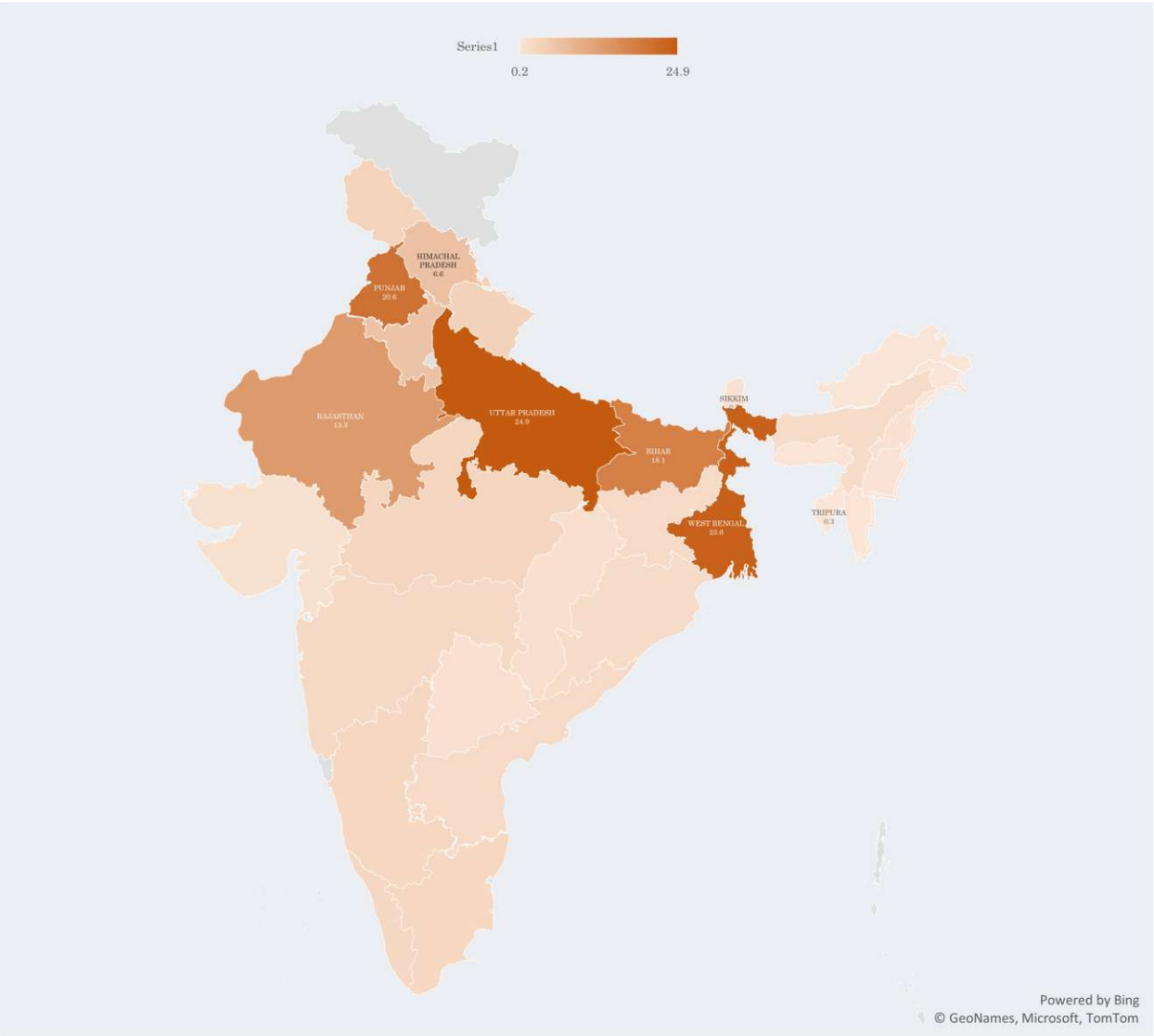
Beekeeping is a pollution-free, decentralized cottage industry that thrives in diverse landscapes like wastelands, mountains, and degraded lands, often where other crops cannot grow efficiently. It generates additional income for rural populations, supplements nutrition, enhances rural employment, and supports ecological stability. Apiculture fits well with sustainable agricultural practices and biodiversity conservation (Singh, et al., 2024).

With a focus on doubling farmers' income, the Government of India launched the National Beekeeping and Honey Mission (NBHM) in 2020 to promote scientific beekeeping, hive product diversification and achieve the goal of the "Sweet Revolution" (Mithi Kranti). The Honey Mission, under the Ministry of Agriculture is a flagship program for enhancing rural livelihoods through apiculture and boosting honey production with modern technologies and training. Through integrated efforts, the mission strives to increase income and

employment opportunities in rural areas while supporting sustainable development of the apiculture industry (PIB, 2025).

India has recorded sustained growth in honey production over the last decade. Production has nearly doubled from 76,000 metric tons in 2013-14 to over 1.5 lakh metric tons in 2024-25, positioning India among the top global producers of honey. India also holds the largest number of beehives globally. Major honey-producing states include Uttar Pradesh, West Bengal, Punjab, Bihar, Rajasthan in TE 2024-25 (**Figure 1.1**). Diverse bee species support region-specific honey production, offering commercial and ecological benefits.

Figure 1.1: Major Honey Producing States in India in TE 2024-25



Data Label: Production in '000 tonnes
Source: (Ministry of Agriculture & Farmers Welfare, 2025)

India exports around 66 percent of its honey production, reflecting the commodity's growing global demand. The leading export markets include the USA, UAE, Saudi Arabia, and emerging Asian markets. Indian honey is competitively priced with a focus on natural, residue-free, and specialty honey segments but faces challenges such as tariffs and strict import standards, especially in the US market.

Beyond honey production and exports, pollination services by honeybees enhance agricultural productivity by improving yields and quality of fruits, vegetables, nuts, and oilseeds, supporting food security and biodiversity (Joshi, 2024). Apiculture strengthens India's trade competitiveness in natural and organic products and fosters rural development. Rising global consciousness for sustainable, eco-friendly food products position Indian honey as a high-potential, value-added export commodity.

Natural honey is classified internationally under HS Code 040900, described as "Natural Honey." This code covers all forms of honey trade, including both bulk (industrial or ingredient grade) shipments and retail packaged honey. There is no separate HS classification, even at the 8-digit level in India, to distinguish between bulk and retail honey exports. However, based on market intelligence and trade patterns, it can be inferred that the majority of India's honey exports are traded in bulk form, primarily supplied to ingredient manufacturers and large buyers abroad. Exploring honey as a commodity is vital, especially in the Indian context, due to its multifaceted potential for economic growth, rural development, and ecological sustainability. Despite India's position as one of the largest honey producers globally, the sector remains under-optimized with significant gaps in productivity, quality, and value addition. International demand for natural, organic, and traceable honey is rising sharply, driven by consumer preferences for healthier alternatives, creating lucrative export opportunities. Exploring this commodity further can help India diversify and strengthen its agricultural export basket, reduce dependence on traditional crops, and tap into premium global markets.

India's per capita honey consumption remains significantly lower than many global markets, highlighting the sector's overall underdevelopment and substantial untapped potential. Expanding honey production and strengthening apiculture not only enhances exportable surplus but also reinforces pollination services that improve yields in fruits, vegetables, and oilseeds, thereby supporting agricultural productivity and ecosystem stability. The sector plays an important role in income diversification for small and marginal farmers, as well as women in rural and tribal areas, contributing to inclusive and sustainable growth. Aligning with national initiatives such as the Sweet Revolution and Honey Mission, a strategic focus on scientific beekeeping, quality enhancement, value addition, and supply chain strengthening can help position India more competitively in global markets while ensuring long-term sustainability of the sector.

1.2 GI TAGGED VARIETIES IN INDIA

India has registered several GI-tagged honey varieties that offer branding and export differentiation. Notable examples include Sundarban Honey from the world's largest mangrove ecosystem in West Bengal, Ramban Sulai and Bhaderwah Rajmash Honey from the Himalayan region of Jammu & Kashmir, and Marthandam Wild Honey from the forests of Kanyakumari. **Table 1.1** shows the unique characteristics of the GI tagged honey varieties in India.

Table 1.1: GI Tagged Honey Varieties in India

GI-Tagged Honey Variety	Geographical Region	Unique Characteristics	Floral Source	Importance/Market Position
Sundarban Honey	Sundarbans Biosphere Reserve, West Bengal	Rich golden to dark brown honey with wild earthy flavour; harvested sustainably by traditional honey-gatherers ("moules") deep in mangrove forests	Mangrove flowers	High authenticity guaranteed by GI tag; supports conservation and local livelihoods; premium export product with ecological branding (Bhattacharya, 2024)
Ramban Sulai Honey	Ramban District, Jammu & Kashmir	Exotic honey with distinctive sweet flavour sourced from Sulai shrubs native to Himalayas	Sulai (Rhododendron) plants	Prized for unique taste and purity; contributes to Himalayan rural economy; GI tag prevents misuse and enhances premium market status (Khajuria, 2023)
Bhaderwah Rajmash Honey	Bhaderwah, Jammu & Kashmir	(While Rajmash is a bean, the region also produces premium honey varieties)	Various regional flora	Regional branding with NABARD support; GI tag backs economic upliftment and export potential (Khajuria, 2023)
Marthandam Wild Honey	Kanyakumari District, Tamil Nadu	Wild forest honey known for medicinal properties and flavour complexity; collected from biodiversity-rich Western Ghats	Diverse wild forest flora	Valued for health benefits and rural livelihood support; GI tag helps with brand protection and export enhancement (ThePeopleExpress, 2023)

1.3 OBJECTIVE AND SCOPE OF THE STUDY

The main objective of this study is to analyse India's honey export landscape, identify challenges and opportunities, and propose strategies to scale outbound shipments to high-

potential global markets. It includes examining production and export trends, market access barriers, government policies, international standards, and the role of branding (including GI-tagged varieties), with recommendations for beekeepers, exporters, policymakers and support institutions.

1.4 METHODOLOGICAL FRAMEWORK

The study employs a robust methodological framework combining multiple approaches for a comprehensive understanding of India's honey export landscape. It begins with secondary data analysis using authoritative sources such as APEDA, ITC Trade Map, FAO STAT, the National Beekeeping and Honey Mission to capture production volumes, export trends, market shares, and policy impacts. Using this data, quantitative indicators like the Revealed Comparative Advantage (RCA) and Nominal Protection Coefficient (NPC) were computed to evaluate India's export competitiveness across different markets. Complementing these, a thorough literature review was conducted to contextualize findings within existing research and policy discourse. To ground the study in practical realities, stakeholder consultations involving scientists, exporters, beekeepers, government officials, and industry experts were undertaken with field visits to honey-processing units. These helped uncover operational challenges, market barriers, and opportunities for value addition and market diversification. The integration of quantitative data, qualitative insights, and field observations enabled nuanced interpretation and formulation of actionable strategies for boosting India's honey exports through improved production practices, enhanced quality standards, diversified markets, and stronger institutional support. This mixed-method approach ensures that the recommendations are evidence-based, contextually relevant, and stakeholder-informed.

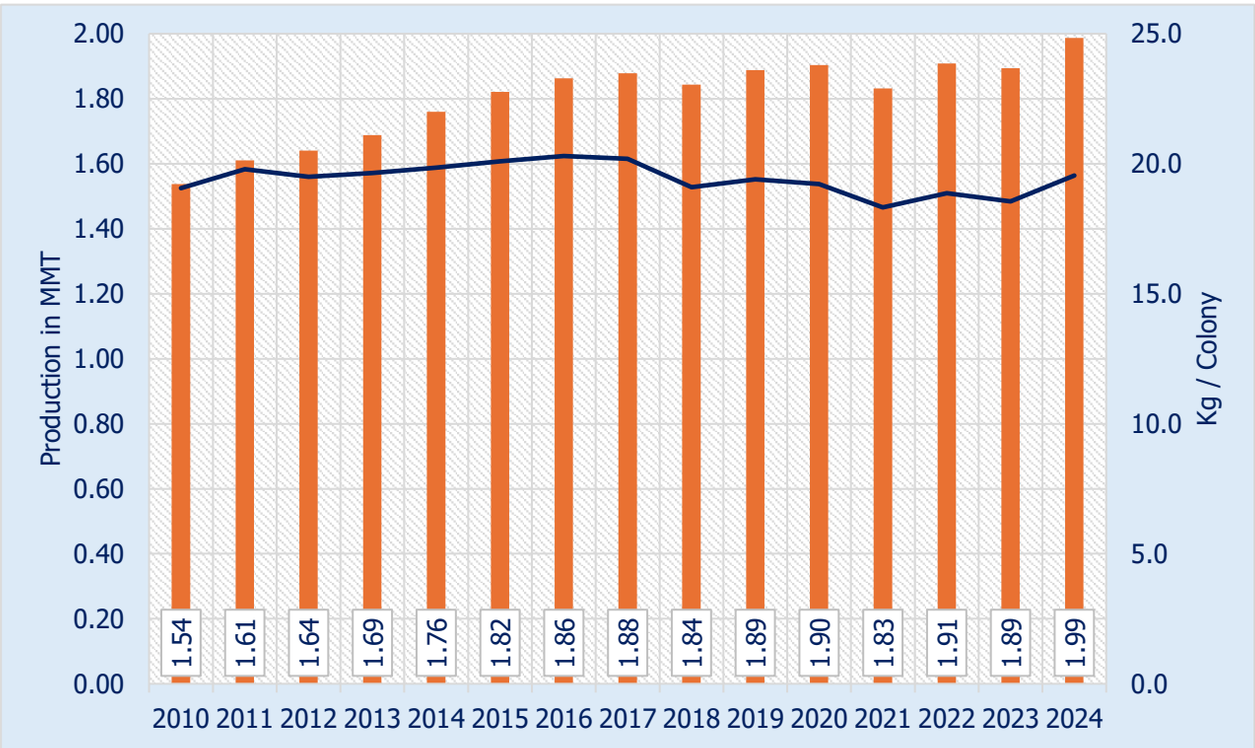
MARKET INTELLIGENCE

MARKET INTELLIGENCE

2.1 GLOBAL SCENARIO

The global honey industry has witnessed a steady growth in production and trade over the last two decades, supported by rising consumer preference for natural sweeteners and functional foods. Global production of honey was estimated at nearly 1.99 million tonnes in 2024, showing a significant increase from about 1.54 million tonnes in 2010 (**Figure 2.1**). Although this implies only a modest growth rate of around 1.88 percent annually, demand-side dynamics have been robust, creating opportunities for both established and emerging exporters.

Figure 2.1: Global Honey Production



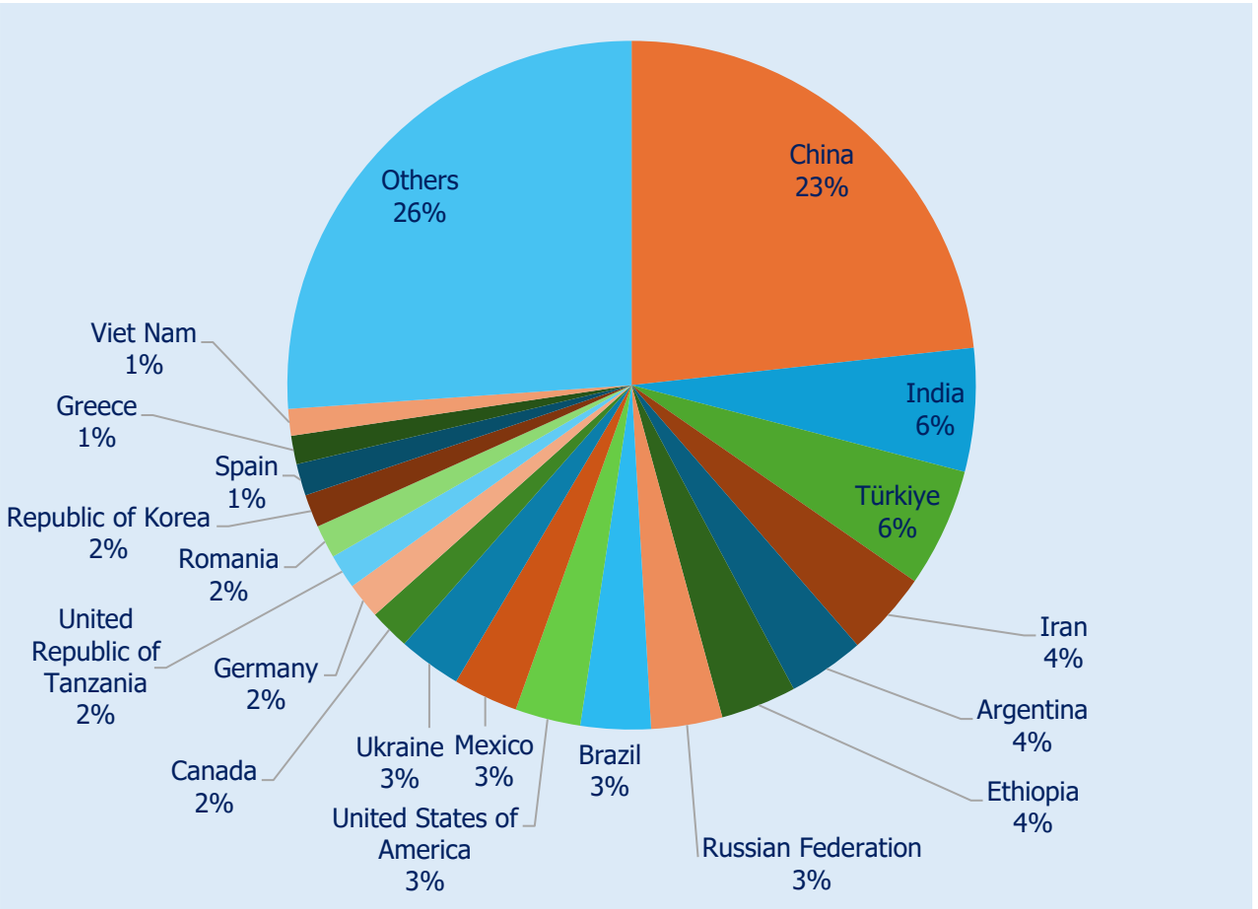
Source: (FAO, 2026)

Global honey production remains highly concentrated among a limited number of countries. In TE 2024, world output stood at approximately 1.88 million tonnes, with China producing 456.7 thousand tonnes, accounting for 24.32 percent of global supply and maintaining its position as the largest producer. India has emerged as the second-largest producer, with 113.7 thousand tonnes (6.05 percent share), followed by Türkiye at 109.6 thousand tonnes

(5.83 percent) and Iran at 78.2 thousand tonnes (4.16 percent). Other significant contributors include Argentina (3.74 percent), Ethiopia (3.72 percent), the Russia (3.50 percent), Brazil (3.44 percent), and the United States (3.21 percent).

While Asia continues to dominate global production, African countries such as Ethiopia and the United Republic of Tanzania are expanding output, reflecting growing adoption of modern beekeeping practices. Despite relatively stable global supply, the honey market remains vulnerable to concerns over quality, authenticity, and traceability. Importing regions, particularly Europe and North America, have tightened regulatory scrutiny due to recurring issues related to sugar syrup adulteration and antibiotic residues. In this context, for major producers like India, sustaining growth will depend not only on increasing production volumes but also on aligning more closely with stringent international compliance and quality standards to strengthen export competitiveness.

Figure 2.2: Major Global Producers in TE 2024
Total Production: 1.88 MMT

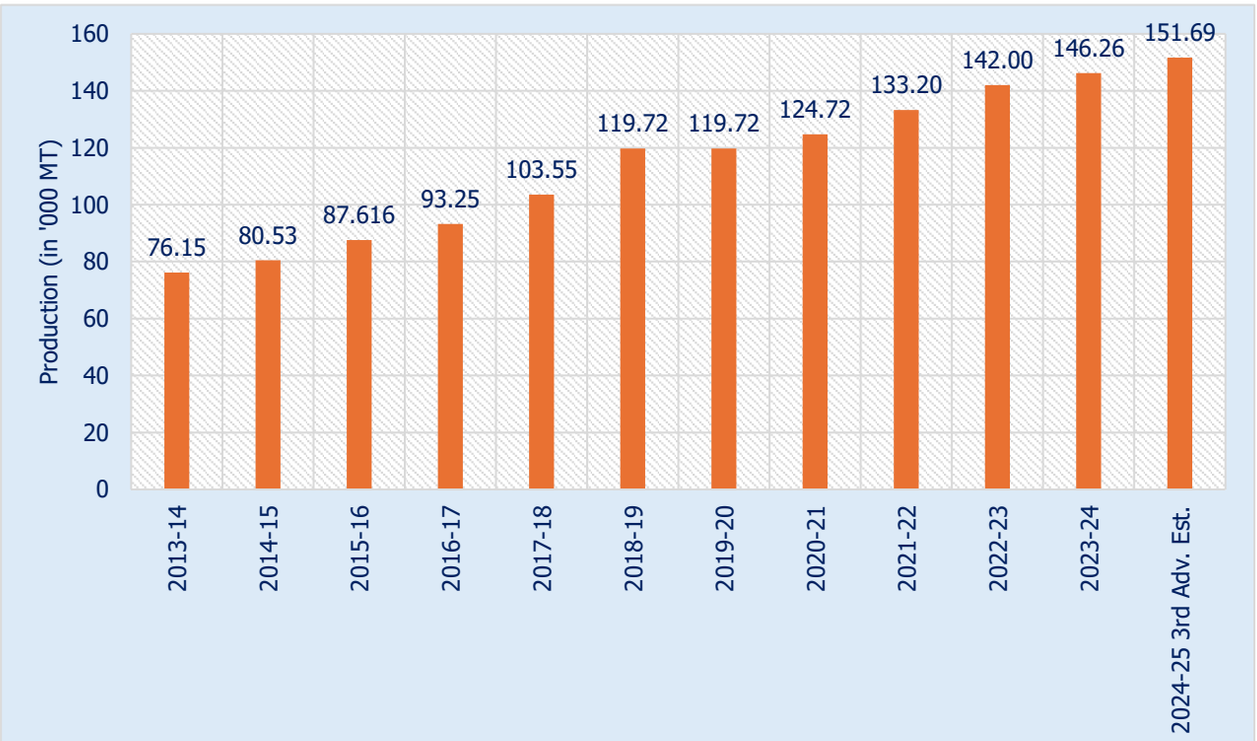


Source: (FAO, 2026)

2.2 DOMESTIC SCENARIO

India has emerged as a significant player in the honey sector, both in terms of production and export. In FY24, India produced nearly 146,260 tonnes of honey, a remarkable growth from the early 2010s when production was less than half of this figure. By FY25, production is estimated to cross the mark of 150,000 tonnes (**Figure 2.3**). This reflects an impressive annual growth rate of approximately 6.54 percent, considerably higher than the global average.

Figure 2.3: Honey Production in India in the Last Decade



Source: (Ministry of Agriculture & Farmers Welfare, 2025)

The spatial distribution of honey production in India is skewed towards the northern and eastern states. Uttar Pradesh contributes 17 percent, followed by West Bengal (16 percent), Punjab (14 percent), Bihar (12 percent), and Rajasthan (9 percent). These states benefit from abundant floral resources, especially mustard, litchi, and eucalyptus that forms the backbone of India's honey flow seasons (**Annex 1**).

India has around 3.4 million bee colonies, with the majority devoted to the European honey bee, *Apis mellifera*, which is more productive and commercially viable. *A. mellifera* colonies yield 40-50 kg per hive, compared to the indigenous *Apis cerana* (6-8 kg) that contributes only 5–10 percent of the total output (TNAU, 2025). The adoption of *A. mellifera* is one of

the biggest drivers of India's rising output, supported by training and promotion under the National Beekeeping & Honey Mission (NBHM, 2025).

India produces a diverse range of monofloral and multifloral honeys, including eucalyptus, litchi, acacia, sunflower, and various wild honeys but mustard honey continues to dominate production and export volumes. This is aligned with the timing and abundance of mustard flowering in major producing states such as Punjab, Uttar Pradesh, Haryana, and West Bengal. During the mustard bloom, a pronounced seasonal glut emerges as large volumes of honey are harvested within a short span. Given that the sector is largely unorganised and most producers are smallholders, access to adequate storage, conditioning, and processing facilities remains limited. Consequently, farmers are often compelled to sell immediately at depressed market prices that fail to cover costs. This downward pressure on prices is further reinforced by the structure of the domestic value chain that is heavily dependent on intermediaries and provides limited direct linkages to value-adding processors, thereby weakening farmers' bargaining position and reducing incentives to adopt improved practices. The heavy concentration of supply in a single season represents a commercial vulnerability and a policy challenge. To stabilise farm incomes and enhance export competitiveness, nectar sources across geographies and seasons should be diversified by promoting alternate floral crops such as sunflower, sesame, and cinnamon with development of floral calendars and agro-forestry interventions that ensure continuous honey flows and year-round availability of high-quality nectar and pollen.

Although, in recent years, growing awareness among farmers of the agronomic benefits of pollination has led to an expanded market for paid pollination services in India. Orchardists and horticultural growers, particularly apple producers in the Himalayan belt, regularly contract beekeepers to provide "rent-a-bee" pollination, remunerating apiarists at rates that range from INR 700 to 1,600 per hive (and in commercial offerings around INR 1,200 per box per month) depending on the region, season and colony strength (Bera, 2025). In favourable seasons, revenues from such pollination contracts can exceed income from honey sales for migratory beekeepers since multiple orchards hire the same boxes consecutively and pay for the period of bloom. This income stream is inherently risky as itinerant colonies deployed to apple orchards in northern India are exposed to climatic shocks and agronomic hazards, including pesticide exposure, and episodes of unseasonal cold, rain or snowfall have on occasion killed substantial numbers of managed colonies used for pollination. Such weather events that effectively halt bee foraging and can cause mass mortality when core colony thermoregulation fails, underscore the fragility of pollination-based livelihoods and the need for risk-management mechanisms such as insurance, emergency shelters and timing protocols to stabilise beekeeper incomes.

Despite notable progress in apiculture, Indian beekeepers face a range of structural and systemic challenges. Production is vulnerable to seasonal fluctuations, with a heavy reliance on a single floral source, mustard that exposes the sector to price volatility and supply shocks. Limited access to affordable credit and the near absence of tailored insurance products constrains farmers' ability to manage risks and invest in modern practices. Domestic demand for honey remains relatively underdeveloped. While average per capita consumption in India is estimated at only around 37 grams per year, in mature markets such as Germany it reaches 1.1 to 1.2 kilograms annually (NAAS, 2025), reflecting cultural preferences and stronger market development. To sustain long-term growth and enhance competitiveness, India must strengthen scientific beekeeping practices, expand farmer awareness of the commercial potential of by-products such as beeswax, propolis and royal jelly and promote domestic honey consumption through awareness campaigns and product diversification.

2.3 VALUE-CHAIN

The Indian honey value chain comprises multiple actors including beekeepers, traders, processors, exporters, and retailers, with each stage contributing value while introducing structural bottlenecks. At the *production stage*, honey is predominantly harvested by small and marginal farmers or tribal communities. These producers operate on a small scale, often managing fewer than 50 hives. Following extraction, raw honey is sold to local aggregators or middlemen, who exert considerable influence over procurement. Evidence indicates that middlemen procure honey at INR 80–120 per kilogram, subsequently reselling it to processors or exporters at a significant markup (*Stakeholder Consultations*).

The *honey processing line* follows a structured sequence designed to ensure quality, safety, and compliance with international standards. The process begins with the receipt of raw honey in food-grade buckets, transported from different states via inland road networks using covered vehicles, each subject to hygiene inspection prior to unloading. Buckets are offloaded, and external surfaces are cleaned if required. Containers identified as damaged or non-compliant are quarantined and returned to the supplier. Approved consignments are palletised, stored under ambient, clean, and dry conditions, and sampled for laboratory testing before allocation to processing. At this stage, approximately 70 percent of the payment is made to traders or aggregators, with the remaining balance cleared only after the consignment passes testing in accredited laboratories in Germany and other foreign third-party facilities. Consignments failing to meet the standards are returned.

Processing begins with melting and primary filtration. Buckets allocated for processing are transferred to melting chambers, where hot air and hot water are carefully regulated to maintain honey temperatures below 45°C, ensuring that the product becomes free-flowing

without compromising quality. The liquefied honey is subsequently filtered through stainless steel mesh to remove wax and other foreign matter. Batches that do not meet filtration standards are returned for reprocessing. The filtered honey is then transferred to raw tanks for mixing before undergoing pasteurisation. In jacketed vessels, honey is heated to 60–65°C to inactivate yeasts and microorganisms, followed by secondary filtration to enhance clarity.

Subsequent stages involve *homogenisation and blending*, during which honey from different floral or regional sources is combined to standardise flavour, colour, and moisture levels. Where required, moisture reduction under controlled heat and vacuum ensures water content is brought below 18 percent, a critical parameter for long-term stability and acceptance in export markets.

The conditioned honey is directed either to bulk storage or to packaging operations. For exports, bulk consignments are packed into food-grade drums, while retail lines dispense honey into bottles, jars, or sachets, followed by automated capping, labelling, and coding. At every stage, quality control measures are implemented, including testing for moisture, hydroxy-methyl-furfural (HMF) levels, adulterants, and contaminants such as pesticides, antibiotics, and heavy metals.

Final consignments are released only after satisfactory clearance from accredited laboratories. Finished goods are stored in warehouses with controlled temperature and humidity until dispatch. Export consignments are transported to the nearest Inland Container Depot (ICD), from where they are moved to Mundra port through inland waterways. At Mundra, containers are loaded onto vessels and shipped to destinations such as New York, Philadelphia or Minneapolis. This end-to-end system, from raw material receipt to export shipment, incorporates checkpoints at critical stages to ensure traceability, regulatory compliance, and competitiveness in international markets.

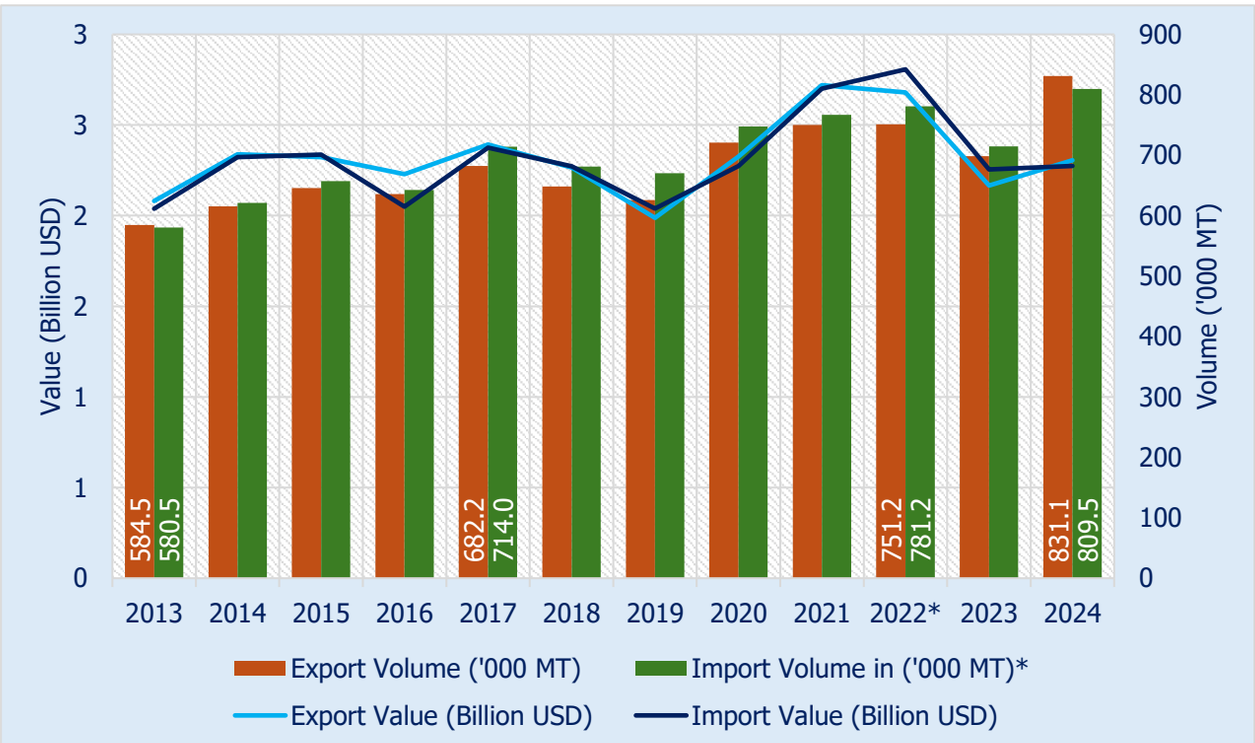
By-products such as beeswax, propolis, pollen, and royal jelly are also part of the value chain, though their economic potential remains under-realised due to limited farmer awareness and lack of technical capacity for extraction. These products have significant demand in cosmetic, pharmaceutical, and nutraceutical industries, highlighting untapped opportunities for income diversification among producers.

Overall, the value chain is heavily skewed in favour of intermediaries and exporters, with producers capturing only a small share of the final retail value. For example, honey sold by farmers at INR 130 per kilogram is retailed at INR 350–400 per kilogram. Introducing producer cooperatives, contract farming models, digital traceability systems, and farmer-owned processing facilities has the potential to rebalance a value distribution and strengthen India's competitiveness in global markets.

2.4 GLOBAL EXPORT TRENDS

The global honey export market is estimated at approximately USD 2.2–2.5 billion annually. In 2023, exports were valued at USD 2.17 billion, followed by a rebound to USD 2.31 billion in 2024. Export volumes average between 700 and 800 thousand tonnes per year, reflecting a relatively stable global demand base (**Figure 2.4**).

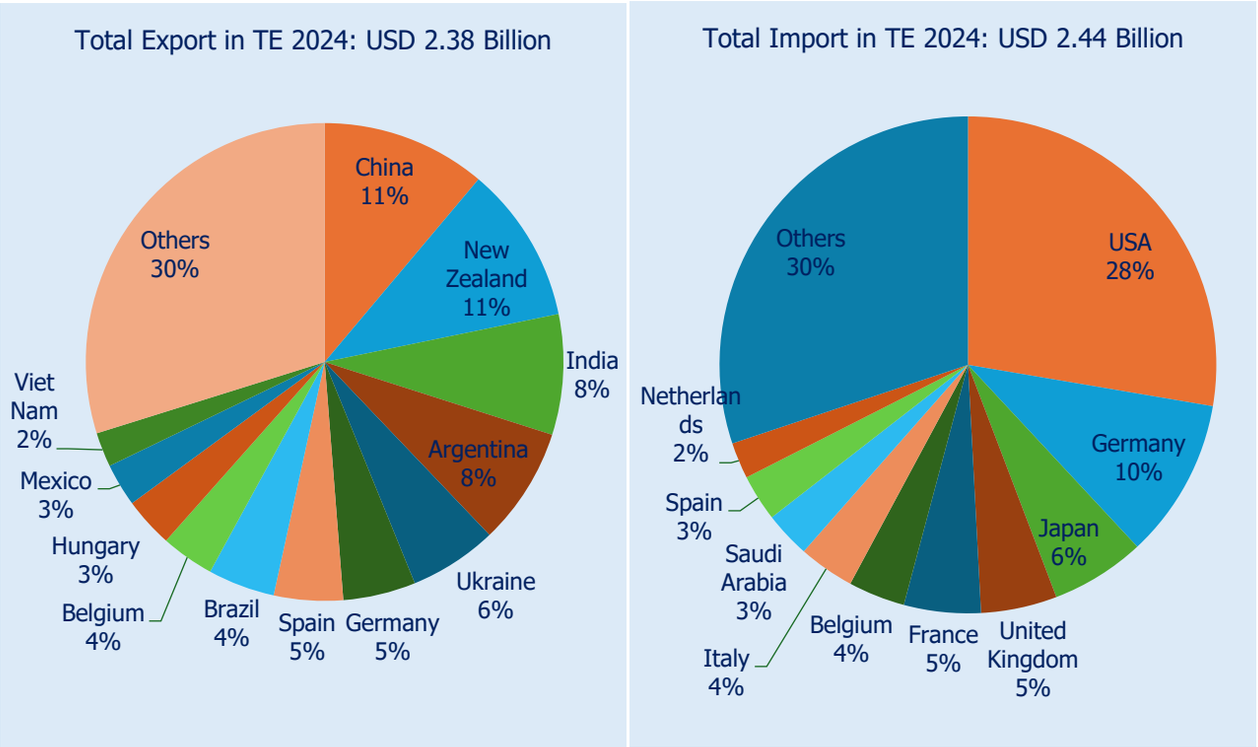
Figure 2.4: Global Export and Import of Natural Honey
(HS CODE: 040900)



Source: (ITC Trade Map, 2025)

Among the leading exporters in TE 2024, China (USD 265.6 million), New Zealand (USD 253.6 million), India (USD 194.3 million), Argentina (USD 189.5 million), and Ukraine (USD 142.1 million) account for nearly half of the global export revenues. Each country occupies a distinct position within the global value chain. New Zealand dominates the premium market segment, leveraging the strong international reputation of Manuka honey. China and India serve as large-volume suppliers, exporting primarily multifloral honey at competitive prices. Argentina has established itself as a consistent exporter through the adoption of scientific beekeeping practices and technological innovations that ensure high yields and quality consistency. Ukraine, despite the challenges posed by geopolitical disruptions, continues to be a resilient supplier to the European Union, underscoring the strategic importance of its honey sector.

Figure 2.5: Major Global Exporters & Importers of Natural Honey



Source: (ITC Trade Map, 2025)

Beyond these major players, other exporters such as Germany, Spain, Brazil, and Hungary contribute to global trade either as re-export hubs or through specialization in distinct honey varieties. Although global honey exports have expanded at a moderate pace in recent years, competition within the sector has intensified due to shifting consumer preferences. Increasing emphasis on traceability, organic certification, and sustainability credentials is reshaping demand patterns. Exporters able to demonstrate authenticity and compliance with stringent international quality standards are progressively securing greater market share, indicating a transition in the global honey trade from volume-driven to value- and quality-driven differentiation.

On the demand side (**Figure 2.5**), global imports of natural honey in year (TE) 2024 were valued at approximately USD 2.44 billion. The United States was the largest single importer, accounting for 28 percent of global imports, highlighting its dominant influence on international demand. Germany ranked second with a 10 percent share, followed by Japan with 6 percent. Other advanced economies also represented significant markets, with the United Kingdom and France each accounting for 5 percent, while Belgium and Italy contributed 4 percent each. Spain and Saudi Arabia followed with shares of 3 percent, and the Netherlands accounted for 2 percent.

Taken together, these leading markets constitute a substantial share of total imports. Nevertheless, a wide range of smaller importers, collectively grouped under the "Others" category, represented 30 percent of global imports. This reflects a broad geographical distribution of demand beyond the major consuming nations.

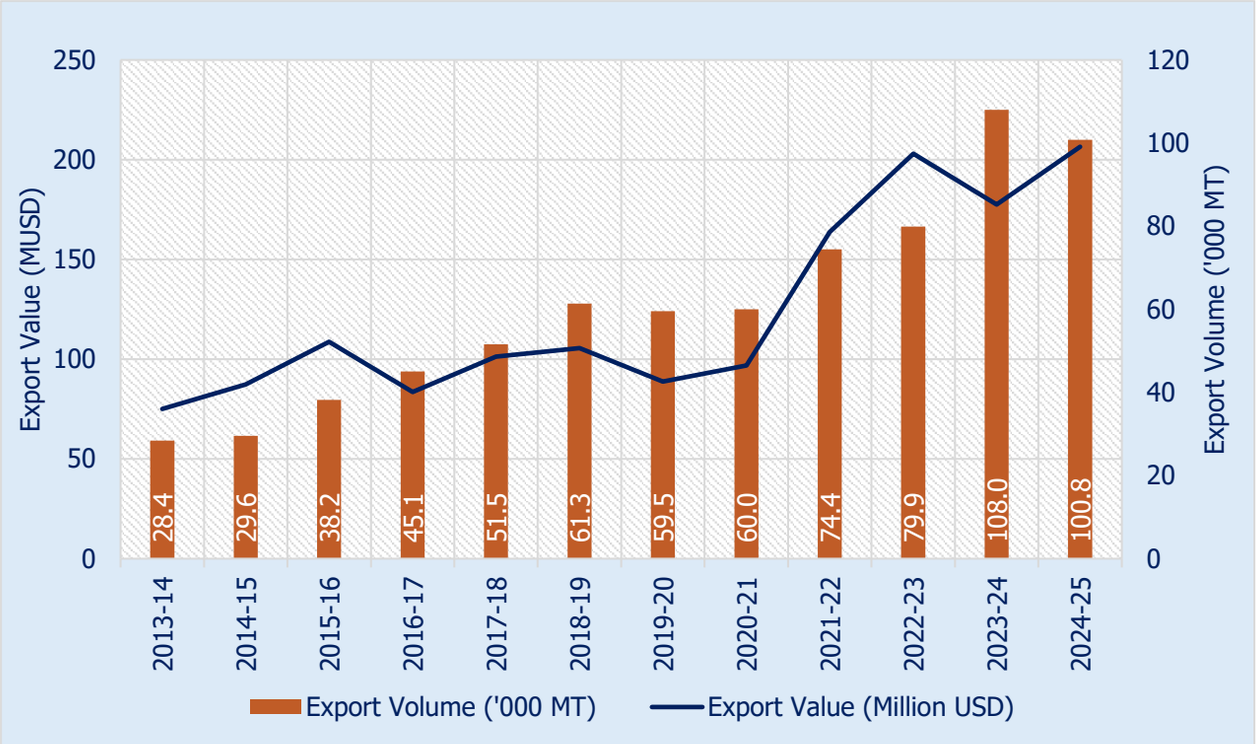
The composition of importers illustrates a dual trend of concentration and diversification. While the United States remains the dominant market, the presence of multiple medium-sized importers across Europe, Asia, and the Middle East demonstrates the dispersed nature of global demand. This distribution underscores the necessity for exporters to adapt their strategies to heterogeneous market requirements across different regions.

2.5 INDIA'S EXPORT TREND

India has transformed itself from a marginal player to one of the top five global exporters of honey. In 2010–11, exports were valued at USD 66 million, which grew more than threefold to USD 206 million in 2024-25. During FY2023–24, India exported about 100,800 tonnes valued at USD 206 million. This trajectory is also evident in the trends presented in **Figure 2.6** that shows export volume and value of natural honey from 2013–14 to 2024–25. Export volumes rose steadily from around 28,400 metric tonnes in 2013–14 to a peak of nearly 108,000 tonnes in 2023–24, before showing a marginal dip in 2024–25. The export value has displayed more volatility but overall, an upward trend, reaching its highest level of over USD 206 million in 2024-25.

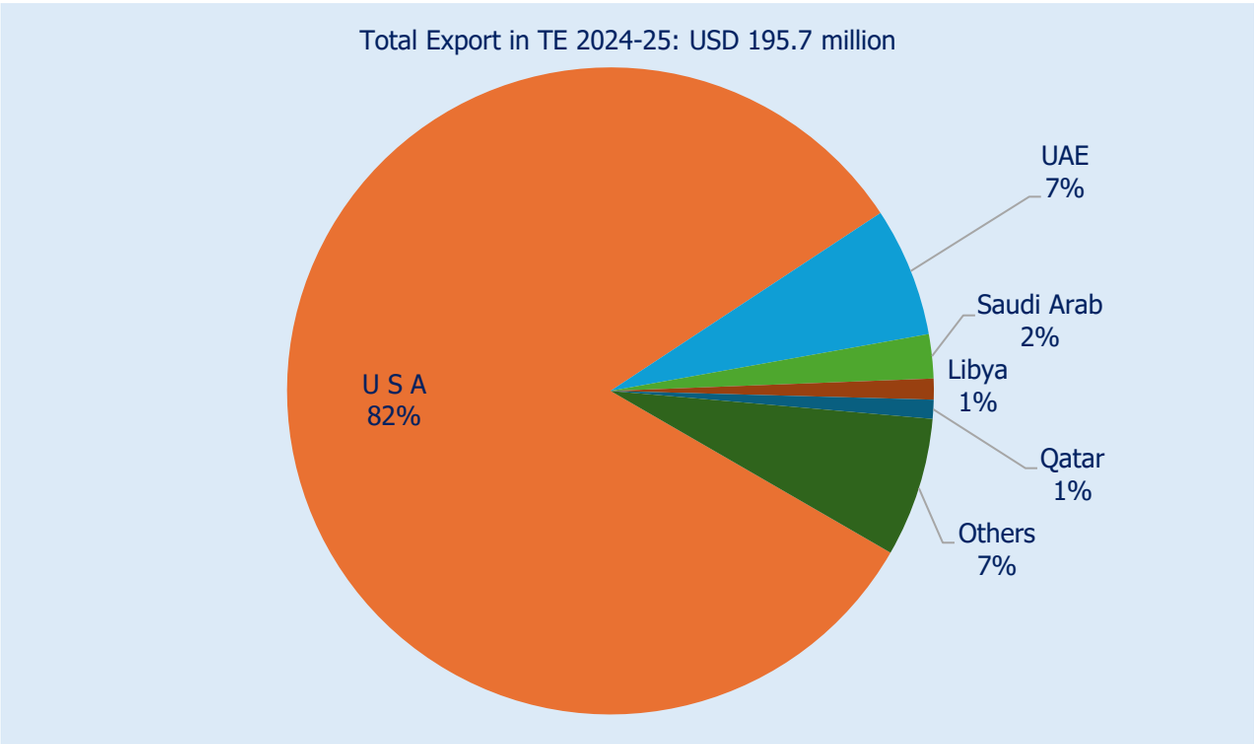
India exports honey to over 100 countries, with the USA, UAE, Saudi Arabia, and Qatar being the dominant markets. This concentration is highlighted in **Figure 2.7**, which illustrates the export destination structure for TE 2024–25, when India's total honey exports amounted to USD 195.7 million. The USA overwhelmingly dominated with an 82 percent share, followed by the UAE at 7 percent, Saudi Arabia at 2 percent, and Libya and Qatar with 1 percent each, while all other destinations together accounted for the remaining 7 percent. The USA, in particular, accounts for more than 80 percent of Indian honey exports, making India highly dependent on a single market. This over-dependence poses risks, as seen recently when the US imposed heavy tariffs on Indian honey, leading to a steep decline in new orders.

Figure 2.6: India's Natural Honey Exports *(HS code: 040900)*



Source: (DGFT, 2025)

Figure 2.7: India's Natural Honey Export Destination *(HS Code: 040900)*



Source: (DGFT, 2025)

The port-wise distribution of honey exports in TE 2024–25, valued at USD 195.7 million, indicates that exports are primarily routed through a few Inland Container Depots (ICDs). ICD Sonipat, Haryana accounted for 29 percent of the total export value, followed by ICD Chowpayal in Punjab at 14 percent. Other key ICDs utilized by exporters include ICD Palwal (Bhagola-Janauli) in Haryana (10 percent), ICD Samalkha Panipat (8 percent), ICD Sahnewal (GRFL Punjab) (8 percent), and ICD CFS Startrack Dadri (8 percent). Smaller shares were recorded at ICD Ludhiana (5 percent), ICD Modinagar and ICD Kanakpura (4 percent each), while other ICDs together accounted for 10 percent (**Annex 2**).

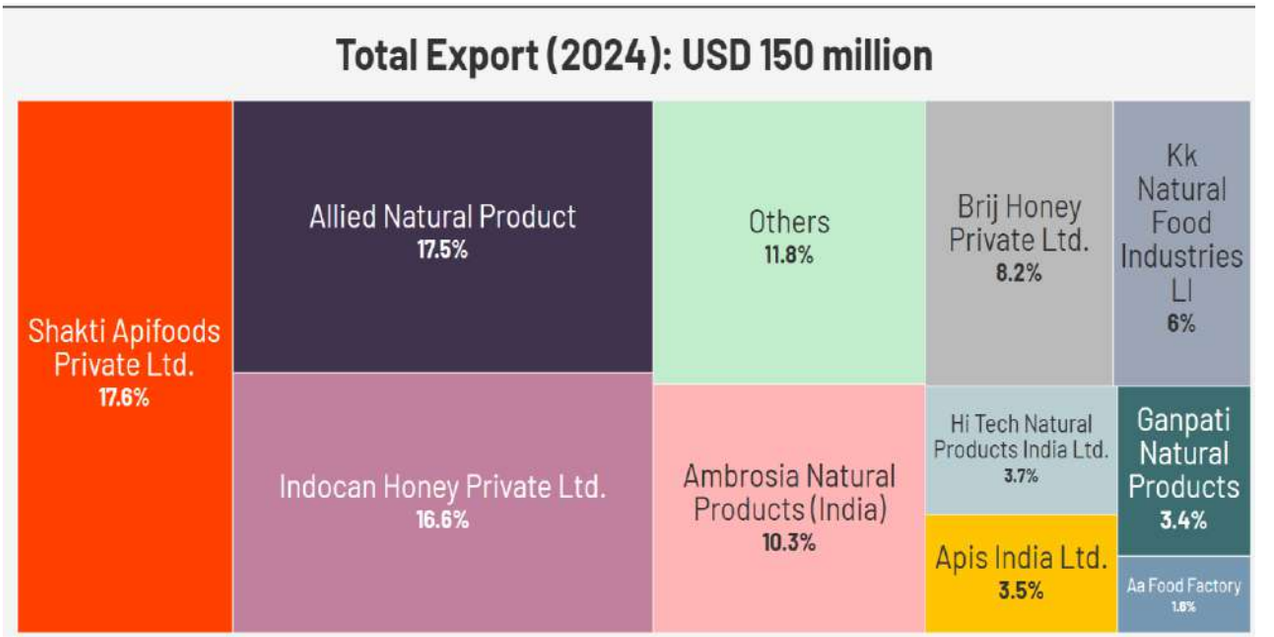
This distribution reflects the fact that many honey processing and exporting units are located in close proximity to these ICDs in Haryana and Punjab, and these facilities are therefore commonly used by exporters for shipment.

Despite setbacks, India still commands around 12 percent of the global honey exports. Its competitive advantage lies in low-cost production and large-scale supply capacity. To sustain and expand its share, India must diversify to new markets such as the European Union, Japan, and South Korea, while upgrading quality infrastructure to meet their stringent standards.

2.6 MAJOR TRADING FIRMS IN INDIA

Figure 2.8 shows that India's honey exports to the United States in 2024, valued at USD 150 million, were dominated by a few large firms. Three exporters, Shakti Apifoods, Indocan Honey, and Allied Natural Product, together accounted for over half of the total shipments. A second tier of firms such as Ambrosia and Brij Honey added significant shares, while a long tail of smaller exporters collectively contributed about 12 percent. This indicates a concentrated export structure where a handful of firms drive the bulk of trade to the US market, though smaller players continue to play an important supplementary role.

Figure 2.8: Major Honey Trading Firms from India to USA



Source: (Panjiva, 2025)

2.7 BENCHMARKING BEST PRACTICES

The development of globally competitive honey industries in several countries provides important lessons for India as it seeks to enhance its export performance, diversify markets, and move into premium segments. Benchmarking against leading exporters such as Argentina, New Zealand, and Ukraine highlight the role of government support, institutional structures, quality assurance systems, technological adoption, and branding in shaping export outcomes.

ARGENTINA presents one of the most comprehensive examples of a successful honey export model. As the third-largest producer and second-largest exporter of honey worldwide, Argentina produces between 80,000 and 85,000 metric tonnes annually from about 2.5 million beehives managed by more than 23,000 registered beekeepers. What is particularly notable is the export orientation of the sector, with over 95 percent of production destined for international markets, generating annual export earnings of approximately USD 168–177 million. The United States is the single largest importer of Argentine honey, accounting for nearly 72 percent of export value in 2023, followed by Germany and Japan, which underscores Argentina's penetration into both bulk and premium markets. The country's geographic and climatic advantages form a strong foundation: the Pampas region, accounting for over half of national honey output, offers diverse floral resources, long flowering seasons, low levels of industrial contamination, and favourable humidity and temperature regimes. This ecological setting translates into high

yields, with national averages of 30–35 kg per hive and peak performances of 60–70 kg per hive in regions such as Buenos Aires Province, significantly higher than India's 40–45 kg (Groves, 1998) (Nimo, 2005) (OIA, 2022) (Hegelund, 2014).

Institutional support has been central to Argentina's success. The National Apiculture Program (PROAPI), launched in 1997, provides a comprehensive framework encompassing subsidized loans, grants for infrastructure, and mandatory technical assistance to ensure effective utilization of resources. The National Institute of Agricultural Technology (INTA) acted as a research and extension backbone, designing standardized protocols, integrated pest management strategies, and disease control systems. INTA's Beekeeping Demonstrative Units Network, created in 2019, facilitates knowledge sharing among producers and researchers, while distance learning programs extend modern beekeeping practices to remote regions. These initiatives led to widespread adoption of scientific beekeeping methods raising productivity and quality. Complementing these measures, Argentina enforces rigorous quality and sanitary regulations overseen by National Service of Agri-Food Health and Quality (SENASA). Resolution 870/2006 governs hygiene and sanitary aspects of honey houses, while strict limits on moisture (<18 percent), hydroxymethylfurfural (HMF), and diastase activity are imposed to ensure freshness and purity. Comprehensive residue testing for pesticides and contaminants positions Argentine honey as a safe and high-quality product in global markets.

Beyond production and quality, Argentina has developed strong cooperative and organizational structures that amplify the competitiveness of small and medium-scale beekeepers. More than 80 registered beekeeping cooperatives, and over 800 agricultural cooperatives with significant apiculture involvement, provide collective services including processing facilities, shared marketing platforms, and access to organic and fair-trade certification. These cooperative mechanisms lower individual compliance costs while enabling access to premium markets. Export facilitation policies, such as the removal of export reference prices in 2017 and bilateral trade agreements with key importing countries, have strengthened Argentina's market access. Despite challenges such as declining yields linked to large-scale soybean monocultures, Argentina has responded with diversification strategies, pollinator-friendly crop promotion, and habitat restoration programs. Taken together, Argentina demonstrates how ecological advantages, coordinated institutional support, stringent regulation, and cooperative models can combine to create a leading world honey export industry.

NEW ZEALAND's experience, while based on smaller production volumes, illustrates the potential of creating a premium niche through scientific validation, certification, and branding. The success of Mānuka honey is rooted in a formal scientific definition based on chemical markers and DNA pollen analysis a regime mandated by the Ministry for Primary

Industries (MPI). Only honey verified through accredited laboratories as meeting this definition can be exported as Mānuka Honey, which provides strong protection against mislabelling and builds international consumer confidence. Independent certification through the Unique Mānuka Factor (UMF) grading system reinforces product credibility by rating potency, purity, and shelf life. This approach has created a globally recognised premium category where New Zealand commands prices far higher than for conventional honey. The country's industry strategy is aligned with government export promotion policies, linking scientific research with brand-building efforts. The New Zealand example underscores the importance of combining authentication, traceability, and premium branding to capture higher value segments of the global honey market (Apiculture-NewZealand) (MPI, 2025), (UMF , 2025).

UKRAINE highlights the advantages of low-input production systems, organic certification, and alignment with European Union requirements. With its extensive rural landscapes, relatively low levels of industrial pollution, and widespread traditional beekeeping, Ukraine is a supplier of residue-free and organic honey suited to EU demand. Ukrainian honey exports surged following the signing of the EU–Ukraine Association Agreement that granted tariff-free quotas, but compliance with strict EU sanitary and phytosanitary requirements remains critical. Producers have increasingly adopted residue testing, moisture and HMF monitoring, and traceability systems to avoid border rejections. Organic certification is a competitive advantage, enabling Ukrainian exporters to access premium segments of the European market. Although the sector faces challenges of adulteration concerns and infrastructural gaps in quality testing, Ukraine's alignment with EU standards and its focus on organic production offer an important benchmark for countries like India aspiring to penetrate the European market.

Taken together, the experiences of *Argentina, New Zealand, and Ukraine* provide distinct but complementary lessons for India. Argentina demonstrates how large-scale productivity gains, institutional support, and cooperative organization can build a strong export-oriented sector. New Zealand shows how scientific validation, certification, and branding can create global demand for premium niche products. Ukraine illustrates the potential of organic certification and compliance with EU regulations to capture high-value markets. These experiences suggest that strengthening farmer training and extension in scientific beekeeping, establishing advanced accredited laboratories capable of conducting NMR and residue analysis, promoting cooperatives to reduce compliance costs, developing independent grading and certification systems for specialty honeys, and building branding and traceability frameworks are critical steps. By adopting these best practices, India can reduce its over-dependence on the United States and diversify into premium markets such as the EU, Japan, and South Korea to enhance export earnings and farmer incomes.

ASSESSING COMPETITIVENESS

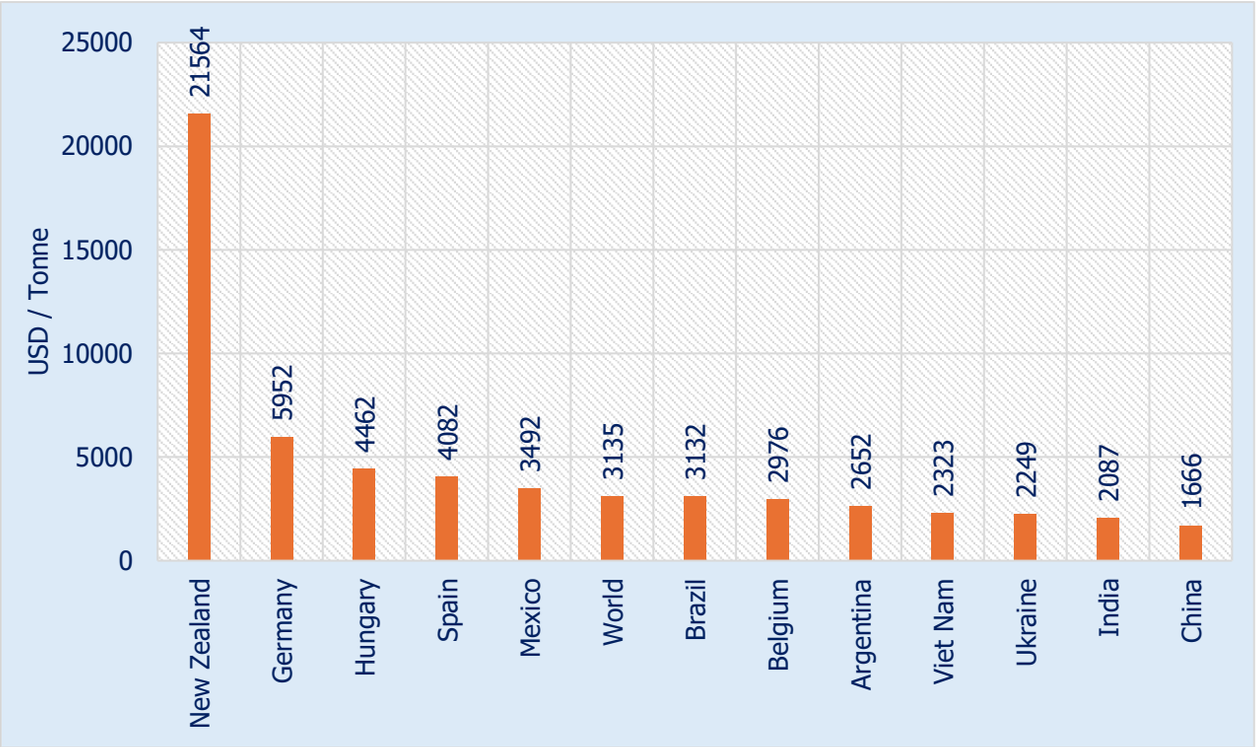
ASSESSING COMPETITIVENESS

3.1 GLOBAL PRICE SCENARIO

An assessment of global unit value prices (UVP) for honey highlights significant disparities across exporting countries. As shown in **Figure 3.1**, New Zealand commands the highest price, averaging USD 21,564 per tonne in TE 2024, a reflection of the premium positioning of its Mānuka honey, which is strongly branded, certified, and demanded in niche markets. Germany follows with a much lower but still relatively high unit value of USD 5,952 per tonne, while Hungary, Spain, and Mexico range between USD 4,000 and USD 4,500 per tonne. The world average UVP stands at USD 3,135 per tonne, with large suppliers such as Brazil and Belgium aligning closely with this figure. Argentina and Vietnam realise lower prices at USD 2,976 and USD 2,652 per tonne respectively, while Ukraine at USD 2,323 per tonne and China at USD 1,666 per tonne occupy the lower end of the spectrum. India's UVP is USD 2,087 per tonne, placing it among the lowest value realisers in the global honey market (**Figure 3.1**).

The relatively lower export unit value of Indian honey can largely be explained by the structural characteristics of the sector. A significant share of India's honey exports is shipped in bulk form, particularly to the United States, where it is primarily used as an ingredient in food processing and industrial applications rather than marketed as branded retail honey. Bulk trade typically yields lower unit values compared to packaged, retail-ready products. In addition, Indian exports are heavily dominated by mustard honey, which has a relatively high glucose content and tends to crystallise faster. Many international retail markets prefer liquid, slow-crystallising varieties, which can influence price realisation. These structural factors collectively shape India's positioning in global honey trade in terms of export unit value.

Figure 3.1: Unit Value Price of Honey for Major Exporters in TE 2024



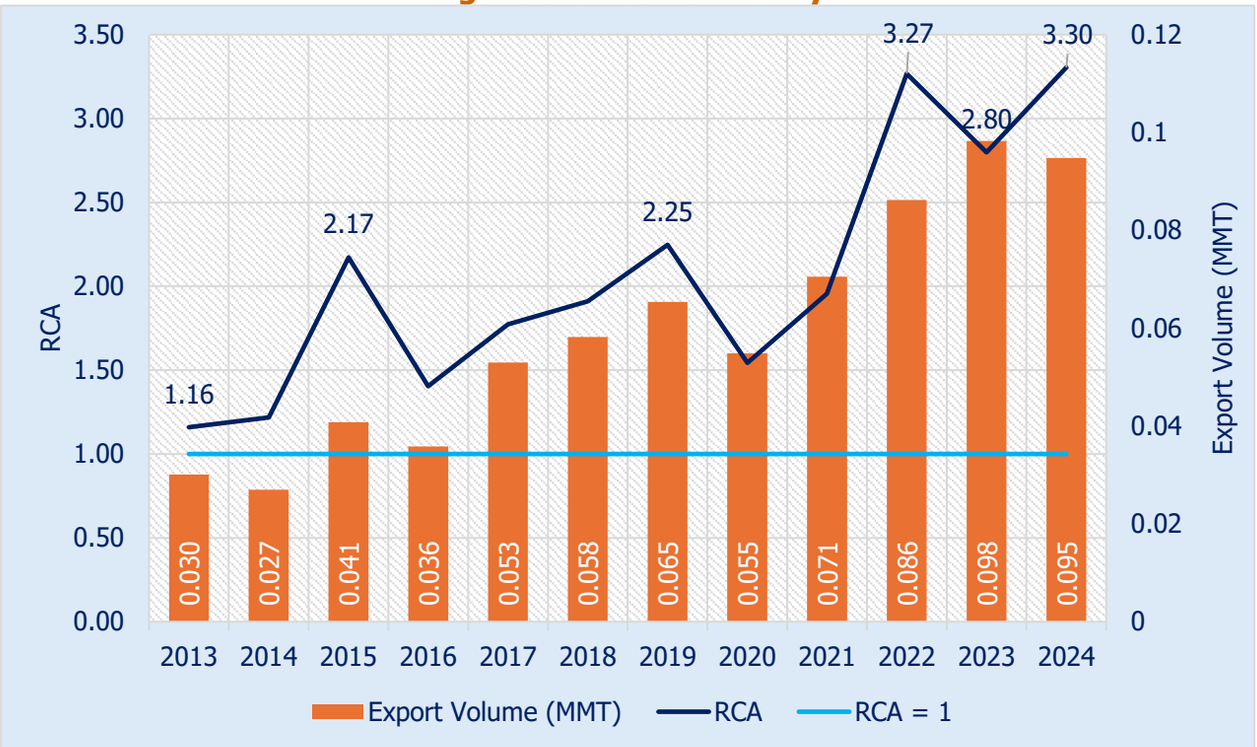
Source: (ITC Trade Map, 2025)

3.2 REVEALED COMPARATIVE ADVANTAGE (RCA)

RCA developed by Balassa is used to measure a country's relative export performance in a specific commodity compared to the global average (Balassa, 1965). An RCA greater than 1 indicates that the country has a comparative advantage in that commodity, while an RCA less than 1 suggests a comparative disadvantage. The RCA is an important metric to assess India's trade competitiveness in honey.

Figure 3.2 presents the RCA of Indian honey between 2013 and 2024, plotted alongside export volumes. The RCA remained above 1 throughout the period, confirming that honey is a product of comparative advantage for India. From 2013 to 2016, the RCA fluctuated around 1.0–1.2, indicating only a marginal advantage. It rose sharply in 2015 due to stronger export performance, before declining again in 2016. From 2017 onwards, the RCA displayed a steady upward trend, reaching around 1.9 in 2019 and recovering strongly after a dip in 2020. By 2022, India's RCA exceeded 3.0, reflecting growing export and an increased global market share. Although the value slightly moderated in 2023, it rose again in 2024 to reach around 3.2.

Figure 3.2: RCA of Honey



Source: (Author's own calculation; Data: ITC trade map, 2025)

The simultaneous rise in RCA and export volumes reflects India's strengthened competitive position in global honey trade. India has successfully captured and consolidated its presence in the bulk honey segment, demonstrating efficiency, scale, and reliability in meeting large-volume international demand. While bulk exports form the backbone of current trade, this strong foundation also creates opportunities to further enhance export performance. In particular, the ready-to-eat and retail-packaged segment has shown steady growth, indicating scope for expansion through branding, quality enhancement, traceability, and product differentiation. Building on its established strength in bulk exports, India can strategically deepen its presence in higher-value retail segments to further boost overall export earnings.

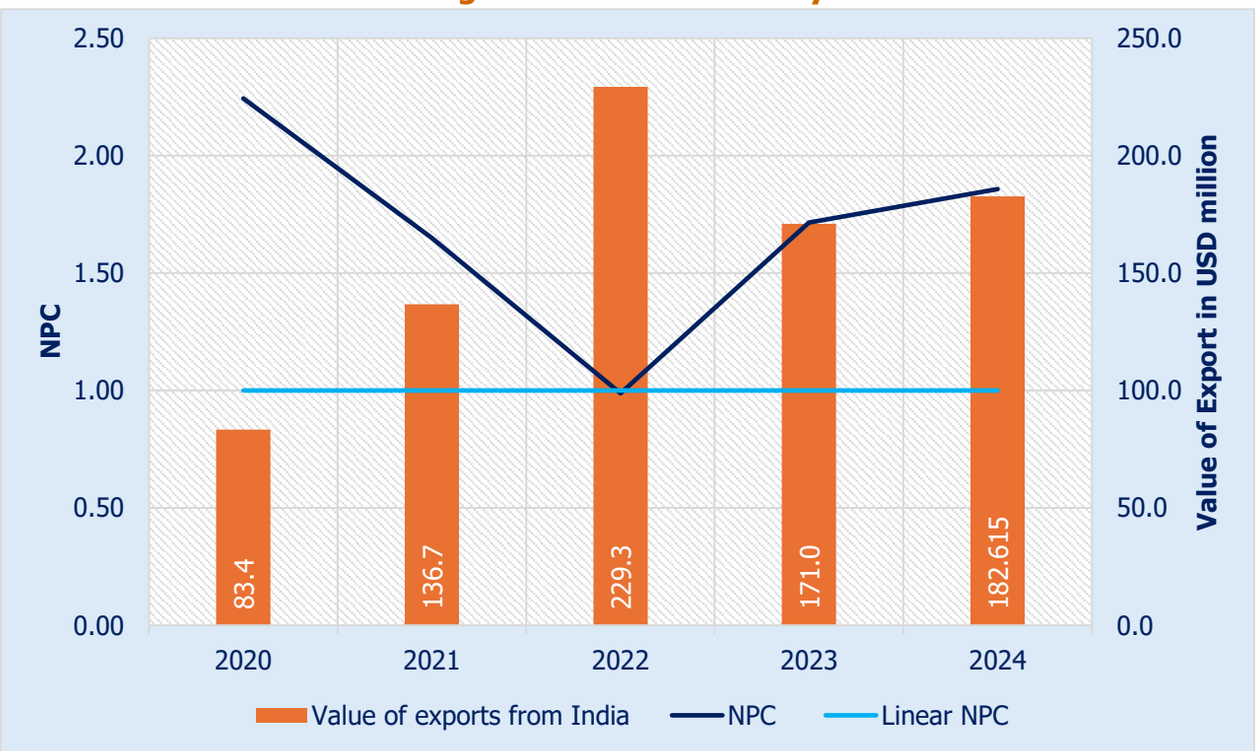
3.3 NOMINAL PROTECTION COEFFICIENT (NPC)

NPC is a measure used to compare domestic prices with international reference prices, assessing the degree of protection or disadvantage faced by producers in a given sector. An NPC greater than 1 indicates that domestic producers receive higher prices than those prevailing in international markets, suggesting a degree of protection, while an NPC below 1 suggests that producers are receiving less than the international equivalent, implying implicit taxation or negative protection (Bale, 1979).

The graph (**Figure 3.3**) shows that the Nominal Protection Coefficient (NPC) for honey in India remained above unity for most of the period between 2020 and 2024, with a brief moderation around 2022 before rising again in subsequent years. An NPC consistently above one indicates that domestic prices of honey are higher than international prices. In the case of honey, this price wedge is shaped by both policy and market factors. India imposes a relatively high Most Favoured Nation (MFN) tariff of around 60 percent on honey, which raises domestic prices and provides a degree of protection to local producers against cheaper imports.

At the same time, domestic price premiums are reinforced by strong consumer preferences for branded and certified honey. Honey is not viewed as a direct substitute for sugar, which is available at much lower prices, but rather as a health-oriented sweetener. Perceptions of purity, nutritional benefits, and authenticity, supported by branding and marketing, allow firms to command higher prices in the domestic market. Consequently, the elevated NPC values for honey reflect a combination of tariff protection and demand-side factors rooted in consumer trust and brand dominance, rather than cost competitiveness alone.

Figure 3.3: NPC of Honey



Source: Author's own calculation; Data: ITC trade map, 2025, Market Insights

EXPORT POTENTIAL

EXPORT POTENTIAL

4.1 REALISED AND UNTAPPED POTENTIAL

India's honey production has doubled over the last decade, growing from 76,000 tonnes in 2013–14 to 151,000 tonnes in 2024–25 at an average annual rate of 6.5 percent, well above the global growth of 1.6 percent. Expanding across diverse agro-climatic zones, India's apiculture sector is increasingly resilient, supporting rural livelihoods and rising market demand. As the world's 4th largest honey exporter, India accounts for 12 percent of the global market, exporting mainly to the USA (82 percent), UAE (7 percent), and Saudi Arabia (2 percent). In 2024-25, exports reached USD 206 million, with opportunities to diversify beyond dominant buyers like the USA and key markets such as Germany, Japan, and the UK. **Table 4.1** shows the competitor analysis of major honey importing nations of the world.

Table 4.1: Competitor Analysis of Major Honey Importing Nations of the World in TE 2024

Importers	Major Exporters
COUNTRIES	
USA (Total M: 676 MUSD)	**India (26%)**, Argentina (21%), Brazil (13%), New Zealand (8%), Mexico (5%), Viet Nam (4%)
Germany (Total M: 254 MUSD)	Ukraine (14%), Argentina (12%), Mexico (10%), New Zealand (10%), Hungary (7%), **India (0.2%)**
Japan (Total M: 150 MUSD)	China (40%), New Zealand (16%), Canada (13%), Argentina (7.5%), Hungary (6%), **India (0.4%)**
UK (Total M: 121 MUSD)	China (41%), New Zealand (22%), Mexico (6%), Spain (4%), Poland (3%), **India (0.03%)**
France (Total M: 122 MUSD)	Spain (21%), Ukraine (13%), Germany (11%), Belgium (10%), China (7%), **India (0.03%)**
REGIONS	
EU 27 (Total M: 964 MUSD)	Ukraine (13%), China (12%), Germany (8%), Spain (7%), Hungary (7%), Argentina (6%), **India (1.9%)**
Middle East (Total M: 161 MUSD)	**India (13%)**, New Zealand (10%), Germany (11%), Saudi Arabia (8%), Spain (8%), China (7%)

Source: (ITC Trade Map, 2025)

India's honey export potential extends beyond its traditional markets, with several promising regions offering opportunities for expansion due to rising demand for natural, organic, and high-quality honey. While the USA remains the dominant importer,

diversification to other strategic markets is essential to mitigate trade risks and capitalize on growing health and wellness trends globally.

The **European Union**, particularly countries like Germany, the UK, France, and Belgium, presents significant opportunity for Indian honey. These markets emphasize organic, traceable, and specialty honeys, aligning with India's expanding GI-tagged and wild honey varieties. Growing consumer awareness about health benefits and sustainability in Europe drives the demand for clean-label honey, making it an ideal target for value-added Indian exports.

Japan and South Korea are high-value markets with consumers favouring natural and traditional food products, including honey with medicinal properties. The shared cultural emphasis on natural remedies and wellness enhances India's export appeal, especially for its unique and branded honey products.

The Middle East (the UAE, Saudi Arabia, and Qatar) is a rapidly growing market for Indian honey owing to strong demand for natural sweeteners, rising disposable incomes, and the presence of large South Asian diaspora communities familiar with Indian honey's quality. Expanding exports here leverages geographic proximity and cultural ties. Emerging Southeast Asian markets such as Singapore, Malaysia, and Indonesia show potential due to increasing urbanization, health-conscious lifestyles, and a preference for natural food products (Patel, 2025).

These diversified markets offer robust growth prospects due to their health-focused consumer bases, premium preferences, and existing or growing demand for ethically sourced, traceable, and specialty honeys. Strategic market development efforts incorporating compliance with import regulations, branding, and quality assurance will be key to unlocking India's full honey export potential in these regions.

4.2 EXPORT PROJECTIONS

The graphs (**Figure 4.1 & Figure 4.2**) provide a historical and forecasted view of India's honey exports from 2010–11 to 2030-31 (one including the pandemic year and other excluding it), illustrating trends in export volume, production, and export value while incorporating projections based on AAGR.

Solid green columns show actual export volumes ('000 MT), and solid orange columns depict actual honey production ('000 MT). Since 2010–11, production has steadily increased alongside export volumes, although exports consistently remain lower than total production. Shaded columns represent projected production and export volumes, extrapolated using a different AAGRs, indicating continued growth assuming stable market

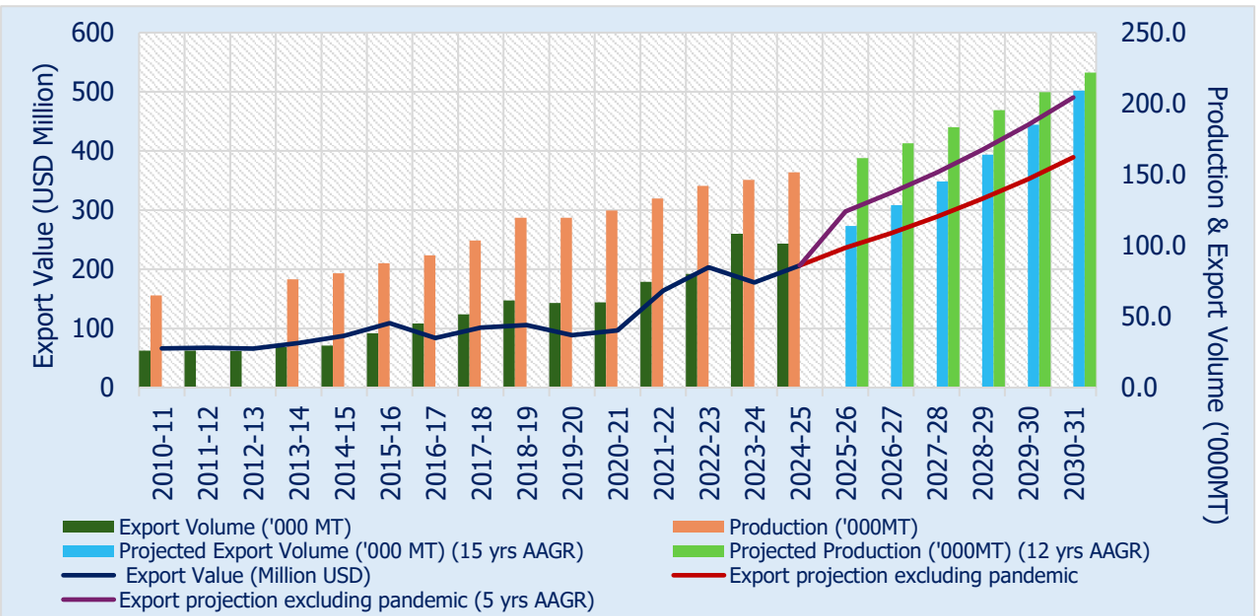
conditions. The solid green line traces actual export values (USD million). Several projection lines forecast future export values under different scenarios:

- The solid teal line shows projections including the pandemic period, based on a 15-year AAGR.
- The indigo solid line reflects projections including the pandemic, using a 5-year AAGR.
- The maroon solid line illustrates projections excluding the pandemic period, based on the 5-year AAGR.

The graph indicates that India's honey production and exports have shown consistent growth since 2010–11, with production exceeding exports, suggesting strong domestic supply capacity relative to export demand. The steady increase in export volume alongside production reflects expanding international market access and export competitiveness.

Projections based on AAGR suggest this upward trend will continue through 2034-35, assuming stable external market conditions. Different projection scenarios for export value highlight the potential impact of the COVID-19 pandemic: projections that include the pandemic period show more cautious growth (especially with the shorter 5-year AAGR), while those excluding it suggest stronger recovery and higher growth potential.

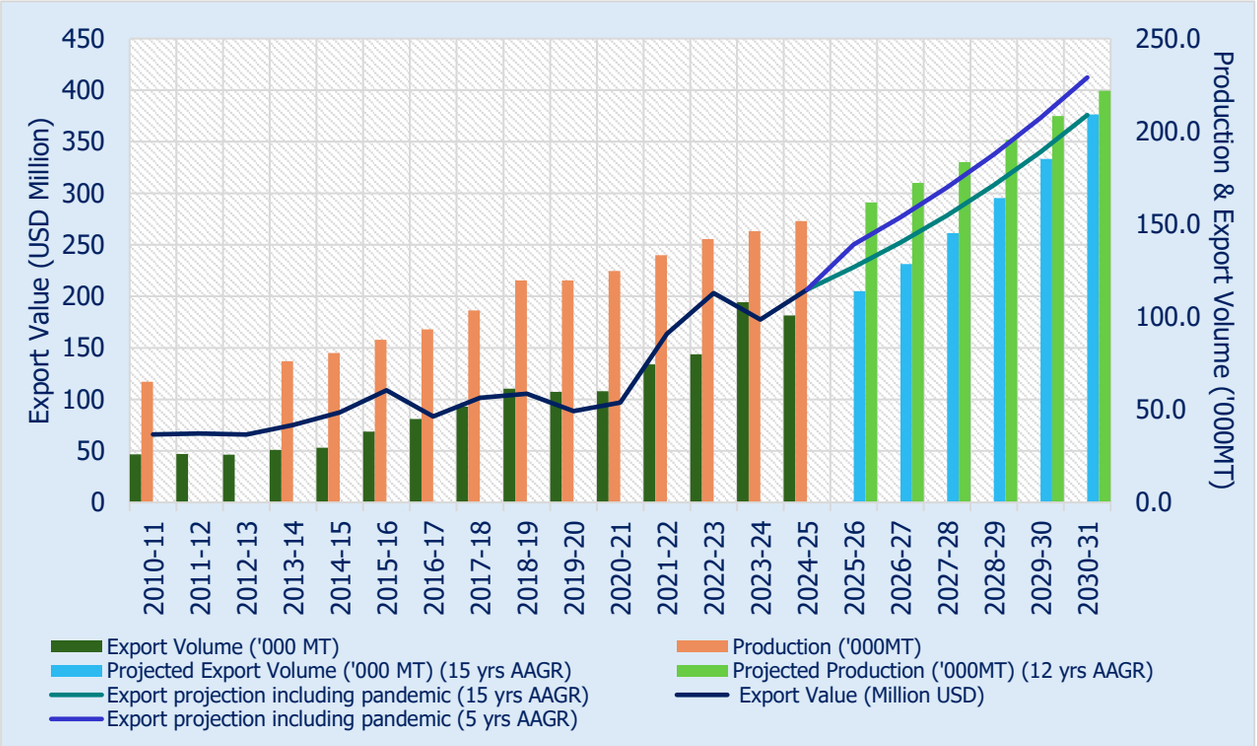
Figure 4.1: Estimated Projections of India's Honey Exports (Excluding Pandemic)



The graph shows positive long-term prospects for India's honey export sector but emphasizes the need to monitor external shocks and market fluctuations that could influence value growth trajectories.

Source: Author's own calculation; Data: (ITC Trade Map, 2025), (Ministry of Agriculture & Farmers Welfare, 2025)

Figure 4.2: Estimated Projections of India's Honey Exports (Including Pandemic)

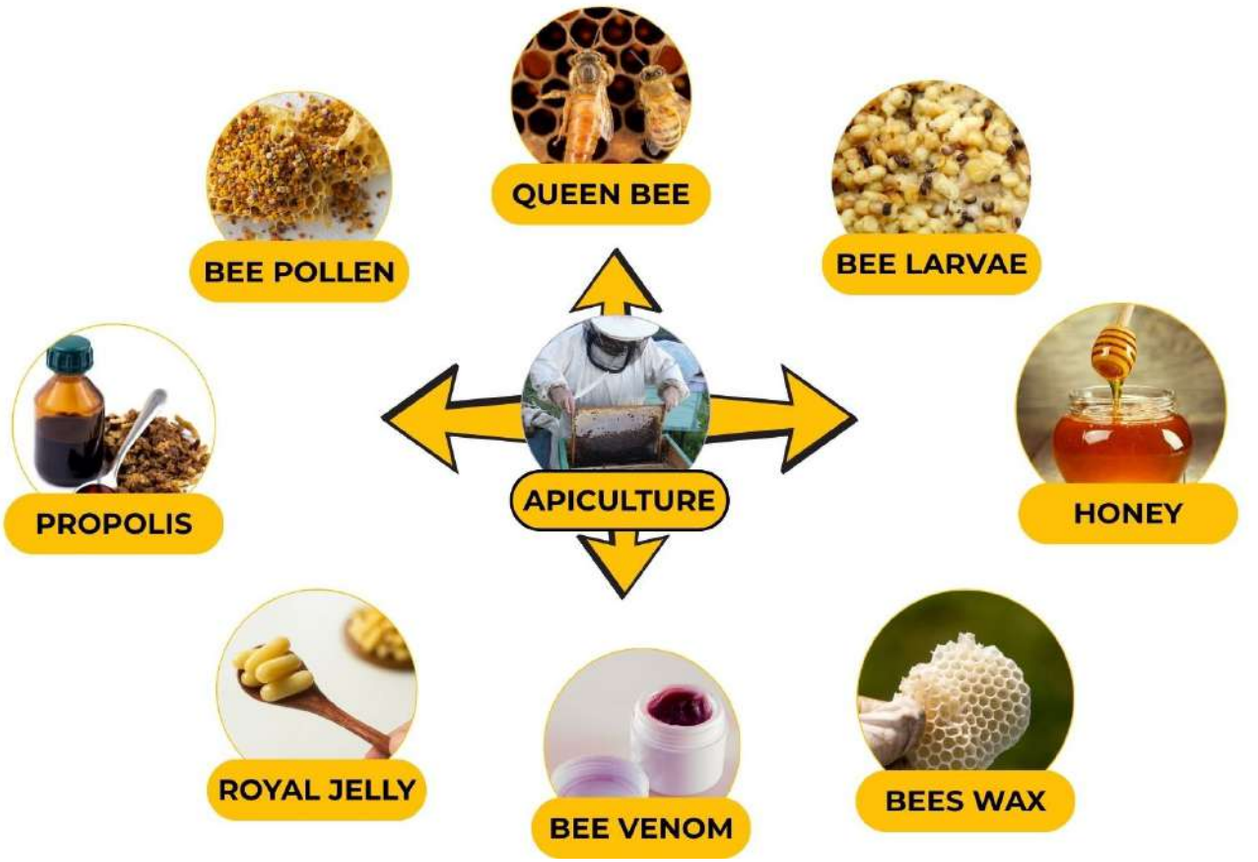


Source: Author's own calculation; Data: (ITC Trade Map, 2025), (Ministry of Agriculture & Farmers Welfare, 2025)

4.3 MARKETS FOR OTHER BEE PRODUCTS

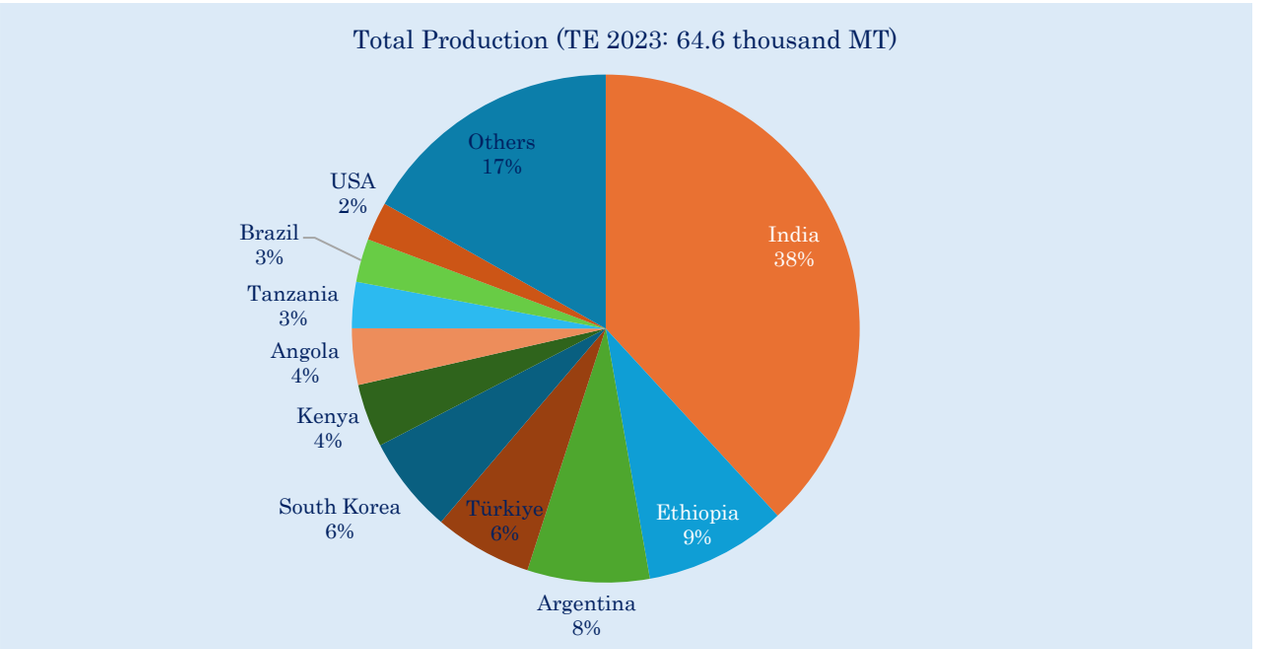
The global bee products market was valued at approximately USD 12.7 billion in 2023 and is projected to reach USD 18 billion by 2032, growing at a compound annual growth rate (CAGR) of about 4.7 percent from 2024 to 2032 (Bee Products Market, 2025). This growth is driven by increasing consumer demand for natural, organic, and health-promoting products in food and beverages, cosmetics, and pharmaceuticals sectors. The rising popularity of traditional medicines and wellness lifestyles, along with expanding applications of bee products like honey, beeswax, propolis, royal jelly, and bee pollen (**Figure 4.3**), is fuelling the market's expansion worldwide. Additionally, growing awareness about the benefits of these products and improvements in apiculture technologies contribute to the steady increase in production and global consumption.

Figure 4.3: By-Products of Apiculture Industry



Source: Author's own compilation

Figure 4.4: Major Producers of Bee Wax in TE 2023



Source: (FAO, 2026)

India's honey by-products, including beeswax (**Figure 4.4**), propolis, royal jelly, and bee pollen, represent a growing segment with substantial untapped export potential owing to their versatile applications and increasing global consumer demand. Beeswax is highly sought after in the cosmetics, pharmaceutical, candle-making, and food industries for its natural, biodegradable properties and skin-friendly attributes. It is an emulsifier, thickener, and protective agent in lip balms, creams, and ointments while being a key ingredient in eco-friendly candles and packaging alternatives. Propolis, known for its powerful antimicrobial and anti-inflammatory effects, is widely used in dietary supplements, natural health products, and skin care formulations, attracting health-conscious consumers particularly in the US and Europe. Royal jelly, a nutrient-rich secretion used to nurture queen bees, commands a premium in health and wellness markets as an immunity booster and anti-aging supplement, especially in East Asia and North American niche segments. Bee pollen, a nutrient-dense mix of flower pollen, nectar, enzymes, and honey, is gaining popularity as a superfood rich in proteins, vitamins, and antioxidants, appealing to fitness and wellness communities globally.

The principal export destinations for honey by-products, both in raw form (e.g., beeswax, propolis, pollen, royal jelly) and as value-added ingredients incorporated into finished formulations are North America and Europe. Demand in these regions is underpinned by strong consumer preference for natural, organic and clean-label inputs used across cosmetics, nutraceuticals and health-supplement industries. Countries such as the USA, Germany, France and the UK have well-defined regulatory frameworks and mature consumer markets that support imports of certified bee-derived ingredients as well as products formulated using these inputs.

The Asia-Pacific region, including Japan, South Korea and China, also represents a growing opportunity, with imports spanning both primary bee by-products and processed products containing them, driven by their longstanding use in traditional medicine systems and rising consumer awareness of natural health benefits (Gusain, 2024).

India's diverse flora and large-scale beekeeping infrastructure give it a competitive advantage to supply these by-products in sufficient volumes while maintaining quality and sustainability standards. Leveraging organic certifications, GI, and fair-trade labelling can enhance the marketability and differentiation of Indian bee products in the crowded global market. Growth in e-commerce platforms and speciality stores enables better direct-to-consumer reach, expanding Indian exporters' access to niche consumer segments focused on wellness and natural living. Strategic investments in processing, quality control, research and development, and value addition can amplify India's share in the global bee by-products market while creating higher-value income streams for rural producers and the wider apiculture ecosystem.

Box 4.1: Organic Honey Production in India — Spotlight on Sikkim

India's organic honey segment is expanding alongside the growth of certified organic agriculture, forest-based livelihoods and premium natural product markets. Organic honey production typically relies on chemical-free forage zones, minimal processing and traceability systems, allowing producers to target high-value domestic and export niches.

Sikkim, the world's first fully organic state, provides a particularly conducive ecosystem for such production. Its chemical-free farming landscape, rich floral biodiversity and traditional beekeeping practices enable the production of distinctive, small-batch honeys. State initiatives and training programmes have also focused on improving quality standards, certification and market linkages to strengthen organic honey value chains.

A notable specialty from the state is **Putka honey**, locally called *"putka-ko-maha"*—is produced by **stingless bees** (tribe *Meliponini*, e.g., *Trigona/Lepidotrigona* spp.), which are widely distributed across the eastern Himalayan region. Ethnobiological studies document that the insect is locally known as "Putka," and its honey has long been used in traditional practices. In Sikkim and adjoining Himalayan areas, rearing or harvesting stingless bees is a **traditional livelihood activity**, and the honey is regarded as highly medicinal in local knowledge systems, reportedly used to treat multiple ailments. Scientific literature also notes that stingless bee honeys generally possess **nutritional and therapeutic properties**, comparable in many respects to conventional honey, reinforcing their value as niche functional products. Beyond Putka honey, Sikkim produces a range of other niche organic honeys shaped by its diverse agro-ecological zones, including:

- **Multi-floral forest honey**, derived from mixed Himalayan flora
- **Buckwheat honey**, darker and strongly flavoured, linked to high-altitude buckwheat cultivation
- **Wildflower and alpine honeys**, reflecting seasonal nectar sources

Source: Biswa et. al. 2017

EXISTING POLICIES

AN OVERVIEW

EXISTING POLICIES: AN OVERVIEW

5.1 GLOBAL TRADE POLICY

India's external policy framework for honey exports is anchored in export facilitation, market access support, and compliance with importing-country sanitary and technical requirements. The Export Inspection Council (EIC) functions as the nodal authority for export certification and quality oversight, ensuring conformity with destination-market standards. Complementing this, APEDA supports the sector through laboratory and testing assistance under its Financial Assistance Scheme (FAS 2021–26).This includes capital subsidies for refrigerated transport and pack-houses (up to 40 percent, ceiling Rs. 2 crores), co-financing of international certifications and laboratory testing (generally up to 50 percent), and support for trial shipments and participation in trade fairs. Such interventions are designed to address "last mile" barriers such as testing and logistics, thereby enabling exporters to meet buyer specifications in premium markets (APEDA, 2025). Exports also benefit from zero-rating under the GST regime, which allows full refund of input tax credit and prevents domestic taxes from being embedded in export prices (CBIC-GST, 2025).

Market access is shaped by tariff regimes in importing countries, as summarised in **Table 5.1**. Indian honey faces particularly steep duties in the United States, where imports are subject to a tariff of 10 percent plus 1.9 cents/kg (as on 27th February 2026), a major impediment given that the USA is India's dominant destination. In the European Union, the tariff on Indian honey is 17.3 percent, considerably higher than the preferential rates available to countries such as Vietnam (duty-free) and New Zealand (4.3 percent under preferential arrangements). Even in the proposed India-EU FTA MEMO, Honey is categorised as a sensitive commodity to the EU. Hence, will not attract any concession (European Commission, 2026). Japan applies a 25.5 percent tariff on Indian honey compared to much lower preferential duties for other suppliers, while the United Kingdom imposes a flat 16 percent (proposed to be zero percent under UK-India CETA from 1st April, 2026). These asymmetries highlight the disadvantages faced by Indian exporters compared to competitors who benefit from bilateral or regional trade agreements (All these tariff rates are reported as on 27th February, 2026).

Table 5.1: Tariff Analysis of Honey[1]

M \ X	India	Argentina	Brazil	New Zealand	Mexico	Viet Nam	Germany	China	Ukraine	Spain
USA	10% + 1.9 cents/kg									
EU	17.30	17.30	17.30	4.3(P)	17.3	0 (P)		17.3	17.3	0
Japan	25.5	25.5	25.5	3.1 (P)	3.1 (P)	3.1 (P)	3.20 (P)	25.50	25.50	3.20 (P)
UK	16[2]	16	16	0 (P)	16	0	0	16	0	0

**(P) refers to PTA; X: Exporter, M: Importer*
Source: (ITC Trade Map, 2025)

Beyond tariffs, non-tariff measures in key markets add to compliance costs. The EU mandates strict residue monitoring, NMR testing and sample retention; Japan enforces quality controls; and the US has imposed anti-dumping duties on some consignments. India's trade policy response combines export facilitation with investments in accredited laboratories, blockchain-based traceability and certifications to ensure conformity with importing-country standards. The alignment between APEDA's final-mile export support and NBHM's domestic capacity-building creates an integrated policy pipeline that addresses tariff and non-tariff barriers.

5.2 DOMESTIC POLICIES

Domestically, the policy ecosystem for apiculture has evolved into a multi-layered architecture centred on the National Beekeeping & Honey Mission (NBHM), the National Bee Board (NBB) as the nodal agency, legacy institutions such as KVIC and CBRTI, and targeted state programmes. The NBHM, launched under the *Aatmanirbhar Bharat* agenda allocated ₹500 crore for 2020–21 to 2022–23, reorganises support along three interlocking mini-missions: Mini Mission I (production and productivity), Mini Mission II (post-harvest management, value addition and marketing) and Mini Mission III (research and technology). Mini Mission I finances Integrated Beekeeping Development Centres (IBDCs) and nucleus stock centres, supports bee breeders and provides fully funded training and women-focused SHG support. Mini Mission II subsidises modern processing units, in-house testing labs, packaging and cold storage (with large capital grants available for processing plants), while Mini Mission III funds region-specific R&D, disease diagnostic labs, pollination studies and IT-enabled traceability pilots. Implementation is project-based, with proposals

[1] These tariffs are updated as on 27th February, 2026
[2] UK imposes 16% tariff on Indian Honey which is proposed to be zero percent from 1st April, 2026 under India – UK CETA.

channelled directly to the NBB by central agencies or through state steering committees; beneficiaries must register on the Madhukranti portal to obtain traceability credentials and access mission benefits (NBHM, 2025).

Complementing NBHM, a set of fiscal and institutional measures supports small producers and export-oriented units. The GST regime is intentionally differential: unbranded loose natural honey is exempt (0 percent) to protect small producers, whereas branded, packaged honey attracts a concessional 5 percent GST, encouraging formalisation of retail value chains (CBIC-GST, 2025). Exporters benefit from GST zero-rating and the input-tax refund mechanism outlined earlier. APEDA's interventions align with NBHM by financing certifications, market development and capital investments that extend domestic capacity into export readiness. At the state level, policies vary in emphasis and intensity: Bihar pursues a high-subsidy model to widen participation (Krishi-Dunia, 2025); Uttar Pradesh pairs subsidies with structured residential training programs (DH & FP, UP, 2025); West Bengal promotes cluster development through common facility centres (DMSME, 2025). These state experiments demonstrate how national mission funds combine with local priorities to shape outcomes on the ground.

Despite the support, several domestic policy frictions remain. Agricultural pesticide practices conflict with pollinator protection goals, contributing to colony losses, beekeeping equipment is frequently excluded from concessional GST classification as an agricultural implement, raising input costs, and delays in subsidy disbursal and uneven access to formal credit constrain adoption of capital-intensive processing and testing equipment. The policy apparatus provides a coherent pipeline from production (NBHM) to export facilitation (APEDA) and fiscal support (GST), and its current orientation toward integrated value-chain development, combining training, infrastructure, testing, traceability and market linkages, forms a substantive basis for India to move from volume-oriented bulk exports toward higher-value, certified and branded exports.

CHALLENGES AND OPPORTUNITIES

CHALLENGES AND OPPORTUNITIES

6.1 CHALLENGES

Tariff and Non-Tariff Barriers (NTBs)

The United States has proposed a tariff of 10 percent plus MFN duty on Indian natural honey, replacing the earlier indication of a much steeper levy. Although the measure is not yet finalised, it is expected to moderately increase the landed cost of Indian honey in the US market relative to competitors such as Argentina and Vietnam, who continue to face lower tariff rates. While the revised proposal reduces the severity of the earlier expected impact, Indian honey may still remain at a price disadvantage, potentially exerting downward pressure on export volumes depending on final duty calibration and exchange rate movements. Beyond tariffs, India encounters non-tariff barriers such as stringent sanitary and phytosanitary (SPS) measures, residue testing requirements, and contamination concerns, especially from the European Union, which previously banned (MoC&I, 2010) honey shipments due to contamination issues like heavy metals. Indian honey must conform to the compositional standards outlined in the EU Honey Directive (2001/110/EC), which specify limits on moisture content (<20 percent), sugar ratios (fructose + glucose ≥60 percent), acidity, and hydroxy-methyl-furfural (HMF ≤40 mg/kg). Failure to meet these criteria results in shipment rejections at EU ports. The EU enforces zero tolerance for banned veterinary drugs such as chloramphenicol and nitrofurans, and mandates MRLs for pesticides and heavy metals; consignments undergo rigorous laboratory testing upon arrival, increasing the risk of rejection for Indian exporters. Origin labelling requirements mandate clear disclosure of the country of origin on all honey packaging, with forthcoming rules from 2026 requiring blends to enumerate all contributing countries and their respective shares, increasing compliance complexity for exporters supplying blended honey. Traceability is critical, demanding that each batch should be traced back to individual beekeepers or collection centres, supported by detailed record-keeping and reference samples; any lapses are treated as non-compliance under EU food safety laws. Processing and export facilities must comply with HACCP-based hygiene regulations (Regulation 852/2004) and be officially approved and listed by both Indian authorities and the EU, as only approved plants are permitted to export honey to the EU. Exporters must register in the EU's TRACES NT system, ensuring every consignment is accompanied by a

veterinary health certificate issued by Indian authorities, with certification delays posing possible trade disruptions. The EU restricts honey imports to approved third countries, with India's inclusion conditional on effective enforcement of residue monitoring plans; failure in EU audits risks suspension of India's market access. These comprehensive non-tariff measures pose significant compliance challenges, underscoring the need for robust quality control and regulatory adherence within India's honey export sector (Agrinfo, 2025).

These non-tariff measures compel Indian exporters to maintain rigorous quality control, adopt good beekeeping practices, and invest in testing and certification to meet importing countries' standards. These tariff and non-tariff barriers reduce the price competitiveness and market access for Indian honey, leading exporters to explore alternative markets such as Thailand, Israel, and South Korea that have shown robust demand growth and offer relatively lower trade barriers. Addressing these challenges requires coordinated government and industry action focusing on quality enhancement, compliance with international standards, and strategic market diversification to sustain and grow India's honey export sector.

Production Challenges

- Floral Scarcity and Seasonal Gaps: Disappearing flora restricts year-round nectar availability, with critical shortages from March to June. During this period, bees are often fed sugar syrup, reducing honey's nutritional quality.
- Variable and Low Yields: Average honey yield is about 50 kg/colony but can drop to 30 kg depending on environmental and management factors. Indigenous bee species like *Apis cerana indica* offer lower productivity than imported species.
- Poor Price Realization: Beekeepers receive low prices (sometimes under INR 100/kg), despite retail prices reaching INR 300–400/kg. High storage and transportation costs, especially for migratory beekeepers, reduce profitability.
- Climate Change Impact: Shifting flowering seasons, habitat loss, and rising temperatures affect bee foraging and colony health, especially in key regions like apple-growing belts.
- Bee Population Decline: Habitat destruction and pesticide exposure contribute to dwindling bee populations, threatening sustainable honey production.
- Adulteration Issues: Honey adulteration damages reputation and limits access to premium export markets.
- Argentina's adoption of advanced beekeeping technology and high yields (80-100 kg per box) highlights India's productivity gap (40-45 kg per box), affecting cost competitiveness.

Market and Export Challenges

- Overdependence on US Market: Indian honey exports rely heavily on the USA, facing risks due to tariffs and regulatory changes.
- EU Market Access: Higher moisture content in Indian honey restricts exports to the UK and EU. Strict standards such as Nuclear Magnetic Resonance (NMR) testing are barriers due to lack of domestic testing capabilities.
- High Logistics Costs: Elevated freight rates, internal transport, and customs charges burdens exporters.
- Insurance Difficulties: Delays in export rejection claim settlements and high premiums strain exporters.

Value Chain and Institutional Issues

- Unorganized Sector: The honey value chain remains fragmented, limiting the effective role of FPOs.
- Limited Floral Diversity: Heavy reliance on mustard limits honey variety; diversification into sunflower, sesame, and cinnamon is suggested for resilience.
- Risk Management Gaps: Bee farmers lack adequate insurance against climatic or catastrophic losses, discouraging investment.

Awareness & Quality Control

- Past Contamination Issues: Previously, quality lapses, such as using tin containers leading to lead contamination, hurt export credibility and is now addressed by improved packaging.
- Adulteration and Traceability: Ongoing issues with adulteration and weak traceability systems threaten market trust domestically and internationally.

6.2 OPPORTUNITIES

Growing global demand for natural and organic honey

Worldwide consumer preference is shifting toward natural, organic, and health-promoting sweeteners, creating expanding international markets for quality honey products. Indian honey, with its unique floral varieties and medicinal properties, fits well offering the potential to attract health-conscious consumers looking for authentic natural honey.

Strategic export markets

India's honey exports currently concentrate on the US and some parts of the Middle East, but there is significant scope for expansion into European countries such as Germany, the

UK, and France, which demand organic and traceable honey varieties. Emerging markets in Asia including Japan, South Korea, Israel, Thailand, and Southeast Asian nations also offer growing opportunities supported by rising disposable incomes and wellness trends.

Government support and policy initiatives

Initiatives like the National Beekeeping and Honey Mission promote scientific apiculture and quality enhancement, assisting producers to meet global standards.

Harnessing diverse apiculture resources

India's diverse agro-climatic zones allow production of a wide range of honey types, monofloral, multifloral, and GI-tagged varieties, offering niche products for premium segments globally. Diversifying floral sources beyond mustard to sunflower, cinnamon, and sesame can enhance the product range and resilience.

Increasing value addition and by-product exports

Beyond raw honey, India can leverage the growing global demand for bee by-products such as beeswax, propolis, royal jelly, and bee pollen used in cosmetics, nutraceuticals, and health supplements markets. Product differentiation through organic certifications and GI can improve international marketability. Regions like Asia-pacific, North America, and EU offer potential markets for these by-products.

Export market diversification to mitigate risks

With rising tariff barriers, particularly from the US, India's strategy to diversify into alternative high-demand markets like Thailand, Israel, and South Korea helps reduce dependency and stabilizes export revenues. Penetrating new markets encourages improved quality standards and innovation aligned to international buyer expectations.

Leveraging digital and e-commerce platforms

The rise of online channels accelerates market access for small and medium exporters, enhancing global reach and direct customer engagement, especially in health and wellness niches for natural honey products.

Table 6.1: Opportunities for India Across Different Markets

Region	Opportunities
Japan: High-Value Niche Market	♦ Imports ~95 percent of honey; strong demand for premium, organic, and safe products. ♦ Indian Himalayan and Ayurvedic honey can be positioned as "health & wellness" products. ♦ JAS organic certification and storytelling around purity can aid market entry.
Middle East & South Asia	♦ UAE and Saudi Arabia are key import hubs benefiting from diaspora demand and re-export trade. ♦ Markets in Bangladesh, Nepal, and parts of Africa prefer affordable natural sweeteners, creating bulk export opportunities.
Europe: Premium Buyers	♦ Germany, UK, and France rank among top global honey importers. ♦ Demand for monofloral (acacia, mustard, eucalyptus) and exotic honeys (forest, wildflower). ♦ Opportunities in organic-certified, fair-trade, and specialty honey segments, subject to strict compliance.
Global Premium/Niche Market	♦ Natural honey market projected to reach USD 15.6 billion by 2032 driven by clean-label and functional food trends. ♦ Ayurvedic and medicinal honeys (*Tulsi*, *Jamun*, Mustard) offer differentiation. ♦ Value-added products like honey sticks, infused honey (ginger, turmeric), and cosmetics provide higher margins.

Source: (ITC Trade Map, 2025) (Fortune, 2025), Stakeholder consultations

FPOs
FPOs
Organising Farmers
through FPOs
Medium-Term Strategies
'Honey for Health'
Campaigns
Organic & GI-Tagged Honey Clusters
Farmer Training &
Modern Beekeeping
Honey for Health
Premium Export Markets
Diversification & By-Products
Export Promotion
& Trade Expansion
Cost Reduction
& Cold Chain
Detailed HS Codes
Sustainable Growth & Global Success

STRATEGIES

STRATEGIES

7.1 SHORT-TERM STRATEGIES

a. Organising the Honey Sector through NRCs and FPOs

Objective: To structurally organize India's highly fragmented honey sector by creating producer organisations that can enhance volumes, traceability, and exports.

Rationale: At present, beekeepers are scattered, small-scale, and poorly linked to markets, which limits quality control and bargaining power. Aggregating them through National Research Centres (NRCs) and FPOs would promote scale and consistency.

Action Points:

- Establish NRCs in major honey-producing states to provide training, technology services and improve productivity and quality.
- Promote FPOs of beekeepers with special focus on linking them with exporters and APEDA clusters.
- Incentivize collective processing, testing, and branding to meet international market requirements.

b. Large-Scale Consumer Awareness and Global Campaigns

Objective: To expand domestic consumption and international demand for Indian honey by positioning it as a natural, healthy sweetener.

Rationale: Global consumer trends toward health, wellness, and sugar alternatives present opportunities for India to promote honey as a lifestyle product. Successful public campaigns (e.g., "Eat More Eggs") demonstrate the potential impact.

Action Points:

- Launch a nationwide "Honey for Health" campaign in collaboration with health agencies.
- Partner with AYUSH and FSSAI to promote honey as a natural sugar substitute and immunity booster.

- Develop international promotional campaigns through APEDA and India Brand Equity Foundation (IBEF) to showcase Indian honey at trade fairs and lifestyle expos targeting consumers in health-conscious markets.

7.2 MEDIUM-TERM STRATEGIES

a. Establishing Honey Clusters for Organic, Wild, and GI-Tagged Honey

Objective: To develop specialised clusters producing certified niche varieties of honey that cater to premium demand in international markets.

Rationale: Organic, wild, and GI-tagged honey fetch significantly higher prices and align with global demand for traceable and ethical products, but require certification and branding infrastructure.

Action Points:

- Identify potential states and regions producing unique honey varieties (Sundarbans, Jammu & Kashmir, etc).
- Set up export-oriented clusters with certification based on importing country requirements (e.g., EU organic standards, GI protections).
- Promote distinctive branding, packaging, and storytelling to showcase "**origin-linked**" identity.
- Launch premium branding campaigns for Indian "**organic honey**" in high-value import destinations like the EU, Middle East, and Japan.

b. Farmer Capacity Building and Productivity Enhancement

Objective: To improve productivity and quality of Indian honey through farmer training in scientific beekeeping and advanced technologies.

Rationale: India's honey yield averages 40–45 kg per box, far below Argentina's 80–100 kg per box, which reflects the benefits of modern technology and scientific beekeeping practices adopted early by Argentine farmers. Building similar capacity among Indian beekeepers is vital for competitiveness and sustainability.

Action Points:

- Design structured farmer training programs in collaboration with ICAR, NBB, and international experts to transfer best practices.
- Introduce modern hive technologies, pest/disease control tools, and systematic monitoring practices.

- Facilitate exposure visits and knowledge exchange programs with high-yielding honey-exporting countries like Argentina.
- Scale up demonstration farms and model apiaries to showcase productivity-enhancing practices.

c. Export Promotion Schemes and Farmer-Centric Approaches

Objective: To strengthen the honey supply base and integrate farmers into high-value export supply chains.

Rationale: Sustainable export growth requires consistent supply of certified, high-quality honey, which is possible only through improved farmer participation and farmer-centric incentive frameworks.

Action Points:

- Introduce dedicated schemes to provide financial support to beekeepers for modern hive technology, quality testing, and traceability systems.
- Facilitate direct linkages between FPOs, exporters, and APEDA through cluster-based models.
- Provide export training and market intelligence updates to farmer groups.

d. Cost Reduction in Value Chains

Objective: To ensure Indian honey remains competitive globally by addressing structural cost barriers in the supply chain.

Rationale: High inland transportation and handling charges make Indian honey less competitive compared to Vietnam and Ukraine.

Action Points:

- Provide inland freight subsidies to reduce logistics costs.
- Invest in dedicated cold-chain and storage facilities for honey clusters to preserve quality.
- Strengthen last-mile connectivity from producing regions to ports.

e. Diversification Beyond Mustard Honey and Promotion of Hive By-Products

Objective: To reduce dependence on mustard honey exports and diversify into higher-value honey varieties and hive products to meet global demand.

Rationale: India's exports are highly concentrated in mustard honey, limiting product variety and export resilience. Alternative honey varieties like cedar honey, forest and floral honeys, along with by-products such as bee pollen, propolis, royal jelly, and beeswax, enjoy strong and rising demand in international nutraceutical, pharmaceutical, and cosmetic industries.

Action Points:

- Encourage beekeepers to diversify apiaries across multi-flora and region-specific plants (e.g. *Cedar honey, Tulsi* honey, etc).
- Develop by-product processing units for bee pollen, propolis, royal jelly, and beeswax under APEDA/NBB programs.
- Facilitate certification and traceability systems for by-products to meet international standards.
- Promote these products in trade fairs and B2B linkages for niche export categories such as natural supplements and cosmetics.

f. Detailing the HS Classification for Honey and Its By-Products

Objective: Enable granular trade monitoring and market development by creating disaggregated HS codes for natural honey and its by-products.

Rationale: At present, natural honey is classified under a single 8-digit ITC HS code (04090000), which does not distinguish between bulk and retail exports. As India's export basket is gradually shifting toward higher-value retail honey, the absence of disaggregated codes limits the ability of policymakers and exporters to assess market trends, price realization, and destination-wise demand. Similarly, key honey by-products such as royal jelly and propolis, despite their growing demand in nutraceutical, pharmaceutical, and cosmetic industries, are largely classified under "n.e.s." categories, while beeswax is clubbed with spermaceti. This lack of product-level visibility constrains export analytics, value-chain financing, and targeted promotion in high-value markets such as North America, Latin America, and the Far East.

Action Points:

- **Propose HS disaggregation:** Work with the DGFT to introduce 8- and 10-digit HS codes distinguishing bulk vs. retail honey and organic honey, creating separate tariff lines for royal jelly, propolis, and refined beeswax.

- **Align with global nomenclature:** Engage with the World Customs Organization (WCO) process to ensure India's tariff refinements are harmonized internationally, enabling better comparability of trade data.

- **Strengthen export intelligence:** Develop a monitoring dashboard using the new HS lines to track destination-wise demand, price realization, and emerging opportunities in medicinal and skincare segments.

India's honey sector stands at a crucial juncture, backed by rapid growth in production and exports, yet constrained by overdependence on a single market, limited product diversification, and stringent global trade barriers. By strengthening farmer capacity, promoting GI-tagged and organic honeys, diversifying into value-added by-products, and systematically reducing reliance on the United States through entry into the EU, East Asian, and Middle Eastern markets, India can reposition itself from a bulk supplier of low-value honey to a trusted global source of premium, traceable, and sustainable bee products. India can tap into niche opportunities by exporting high-value organic honey to discerning global markets, leveraging consumer demand for natural and eco-friendly food products. Coordinated policy support, institutional strengthening, and market-led brand building will be pivotal in realising this transformation. If implemented with urgency and scale, the recommended strategies can increase export earnings and generate resilient rural livelihoods, strengthen ecological sustainability, and enable Indian apiculture to play a leading role in the global natural health and wellness economy.

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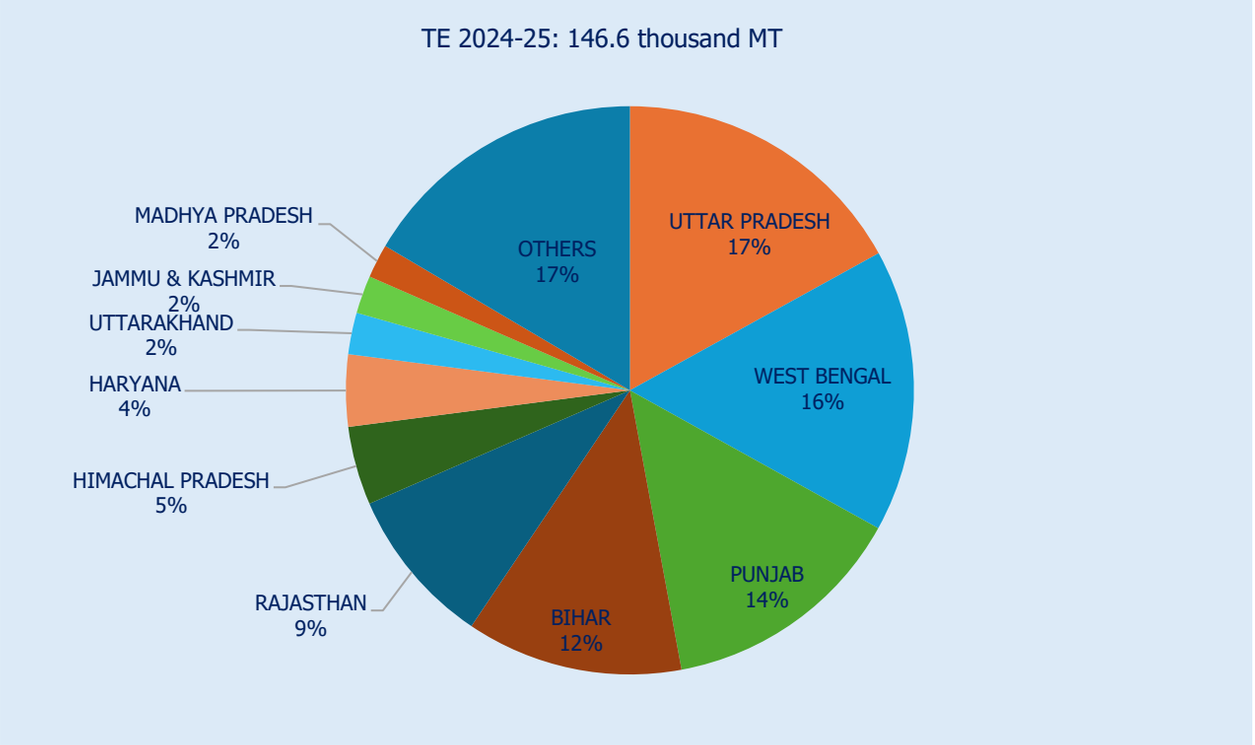
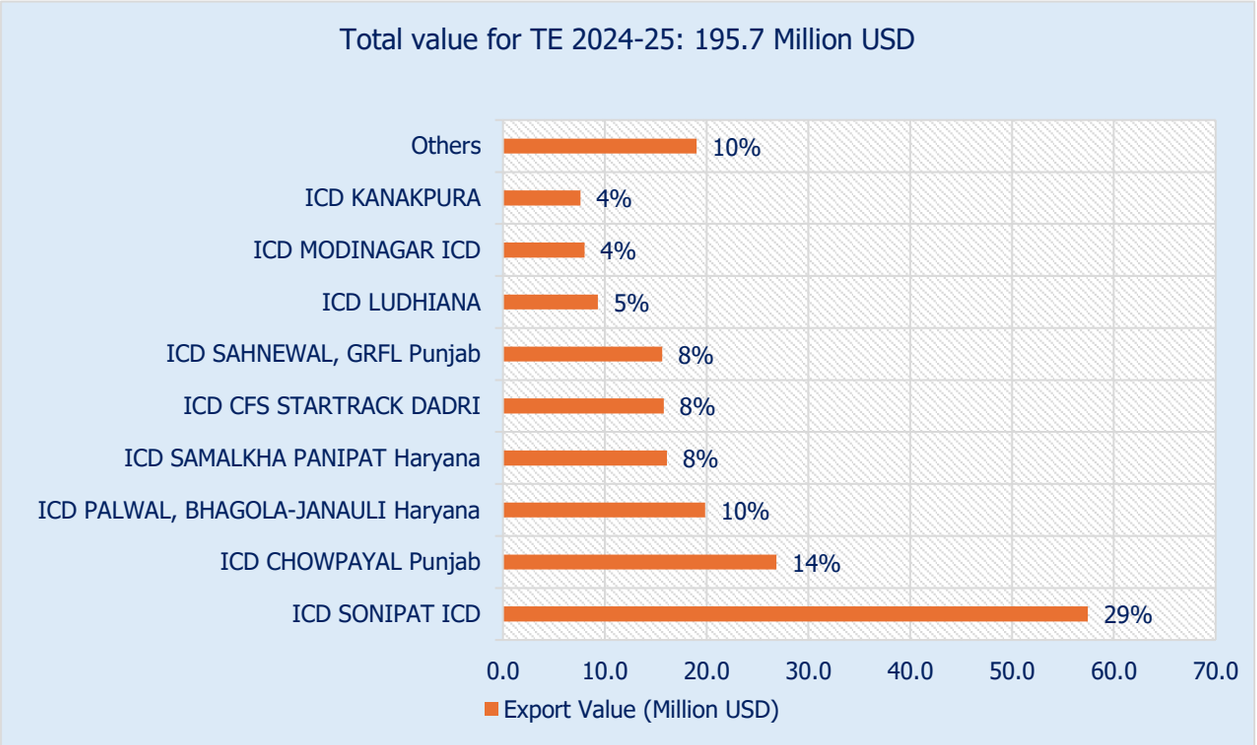
ANNEXURES

Annex 1: Major Honey Producing States in India



Source: (Ministry of Agriculture & Farmers Welfare, 2025)

Annex 2: India's Port-Wise Export Value of Honey



Source: (DGFT, 2025)

Annex 3: Domestic Policies in Natural Honey

Policy/Scheme	Date of Commencement	Key Features & Objectives	Current Status
National Beekeeping & Honey Mission (NBHM)	2020	This is the primary central scheme for promoting scientific beekeeping. It focuses on enhancing crop productivity through pollination, developing post-harvest management infrastructure (like testing labs and processing units), and supporting research and development. It is implemented through the National Bee Board (NBB).	In Effect
Honey Farmer Producer Organizations (FPOs) Programme	2020	Launched as a sub-part of the scheme to create 10,000 FPOs. This initiative focuses on organizing beekeepers into collectives to improve their bargaining power, provide access to modern technology, and create better market linkages. National Agricultural Cooperative Marketing Federation of India Ltd (NAFED) is a key implementing agency.	In Effect
KVIC's Honey Mission	2017	Implemented by the Khadi and Village Industries Commission (KVIC), this mission focuses on generating employment for farmers, *Adivasis*, and unemployed youth by providing them with training and subsidized bee boxes and colonies.	In Effect
"Sweet Revolution"	2016	This is not a specific policy but an overarching mission and slogan given by the Government of India to promote apiculture and make India a top honey exporter. All subsequent schemes are aligned with this goal.	In Effect
Export of Honey (Quality Control, Inspection and Monitoring) Rules	2002	This regulation governs the export of honey. It mandates that honey intended for export must meet the quality and safety standards of the importing country. It establishes procedures for inspection, sampling, and certification by the Export Inspection Council (EIC) to ensure compliance.	In Effect

Source: (NBHM, 2025)

Annex 4: Value-Added Products of Honey

Major Use of Honey as	Products
Direct Consumption as a Food	Honey is commonly consumed in its natural, unprocessed state. • **Liquid Honey**: The most common form, eaten as a sweetener or spread. • **Crystallized (Creamed) Honey**: Preferred for its thick, spreadable texture that doesn't drip. • **Comb Honey**: Honey sold and eaten in its original beeswax comb, considered a delicacy. • **Chunk Honey**: Jars of liquid honey containing a piece of comb honey for aesthetic appeal.
As an Ingredient in Food Products	Honey is a versatile ingredient used in both home cooking and industrial food production. • **In Baked Goods** it adds moisture (due to hygroscopicity), improves texture, enhances browning, and extends shelf life. **Examples**: Breads, specialty cakes, biscuits, and cookies. • **In Confectionery & Snacks** honey acts as a sweetener, binder, and key flavour component. **Examples**: **Traditional Sweets**: Nougat (France), Torrone (Italy), and Halvah (Turkey). **Snack Bars**: Granola and energy bars, where it binds nuts, seeds, and cereals. • **In Spreads, Jams & Preserves,** honey replaces refined sugar and adds a unique flavor. **Examples: Jams & Marmalades**: Honey is boiled with fruit to create preserves. **Spreads**: Creamed honey mixed with ingredients like cocoa, nuts, or butter. **Preserved Fruits**: Whole dried fruits or nuts packed in jars of liquid honey. • **In Dairy Products** honey is used as a natural sweetener and flavoring. **Examples**: **Yogurt**: Mixed into yogurt or layered at the bottom of the cup. **Ice Cream**: Creates a softer ice cream due to its lower freezing point. **Milk Spreads**: A key ingredient in *dulce de leche* (sweet milk) for a richer flavor.
Medicinal & Therapeutic Applications	Honey has been used for its health benefits for thousands of years in both traditional and modern contexts. • **In Topical Use (Wound Care)** Its **antibacterial** properties help prevent infection, while its consistency keeps wounds moist and promotes healing. **Examples**: Applied directly to burns, ulcers, sores, and post-operative wounds to accelerate tissue regeneration and reduce scarring.

	• **In Internal & Traditional Remedies** it soothes irritations and acts as a carrier for other medicinal substances. **Examples**: **Sore Throats & Colds**: Mixed with hot milk, tea, or lemon juice. **Ayurvedic Medicine**: Used as a vehicle to help the body absorb herbal extracts more quickly.
Use in Beverages	Honey is a popular ingredient in alcoholic and non-alcoholic drinks. • **In Non-Alcoholic Beverages** it is used as a sweetener and primary flavour in health-oriented drinks. **Examples**: Honey-lemon drinks, isotonic sports drinks, flavoured iced teas, and as a sweetener in fruit juices. • **In Alcoholic Beverages: I**t acts as the primary fermentable sugar or as a post-distillation flavouring. **Examples**: **Fermented Drinks**: Mead (honey wine) and honey beer. **Liqueurs & Spirits**: Used to flavour famous liqueurs like Drambuie (Scotland), Bärenfang (Germany), and Krupnik (Poland).

Source: (Krell, 1996)

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