Following the success of Bees for Development's first Honey Trade Workshop, which took place prior to the Apimondia Congress in Ireland in August 2005, we organised a second, African Honey Trade Workshop in October 2006. It was organised as part of our DFID/BLCF Project on African Honey, and the main sponsor was Rowse Honey Ltd. Bees for Development’s perception is that the potential of apiculture to bring significant economic development and hence poverty alleviation to Africa, is not yet being achieved. Thousands of poor beekeeper-farmers in Africa have the means and knowledge to harvest honey from bees, yet lack access to reliable markets. The main purpose of the Workshop was therefore to discuss issues surrounding trade in African honey, and ways to increase trade for beekeepers.

**African Honey Trade Workshop**
Over one hundred participants from fourteen countries attended the Workshop, held at Seeta, near Kampala, Uganda in October 2006. For four days African honey producing and trading businesses considered challenges that face honey trade in Africa.

**Organisers**

**Bees for Development** organised the Workshop in partnership with Uganda’s Ministry of Agriculture, Animal Industries and Fisheries (MAAIF) and The Uganda National Apiculture Development Organisation (TUNADO).

**Bees for Development** would like to thank: Rowse Honey Ltd, UK, the DFID/Business Link Challenge Fund, UK and NAADS Uganda for their sponsorship of the 2nd African Honey Trade Workshop. Click a logo (above right) to visit a sponsor’s website.

Photos © Nicola Bradbear
First Lady of Uganda, the Rt Hon Janet Museveni declares the Workshop open.

The Workshop featured formal presentations...
...and informal discussion sessions.

The Rt Hon Serapio Rukundo, Minister for Tourism, Trade & Industry, assisted by Ms Haike Rieks, presents a certificate to Mr Bob Malichi of North Wester Bee Products, Zambia.
The Workshop was held at the Ridar Hotel near Kampala.
FOREWORD AND INTRODUCTION TO THE PROCEEDINGS

Dr Nicola Bradbear

We present to you here all the papers and talks that were given at the Workshop. The Workshop Programme followed the following themes: Hearing from honey importers, The international honey market, EU requirements, Producing fair trade honey and meeting fair trade standards, Honey tasting and exhibition, Producing organic honey and meeting organic standards, Producer associations and supply chain development, and Appropriate interventions = Better returns. All the papers presented in these sessions are given here. Also included are the opening speeches made by The Honourable First lady of Uganda, Mrs Janet Museveni, MP, and other dignitaries, and the overview of Uganda’s apiculture sector provided by Dr Nicholas Kauta.

During the Workshop we had periods where the participants formed groups to consider specific issues more closely. Their discussions were taken on board during plans for the creation of a new African honey trade association, now named ApiTrade Africa. The minutes of the new association’s meetings and statement of establishment are also given here.

Also provided here are the Workshop’s programme and contact details of the participants. We do hope that you find these Workshop Proceedings useful. See also the Proceedings of our first Honey Trade Workshop, (available on this website by clicking here) or on CD, which contain more details about EU accreditation, and information from other continents.

For a summary of the Workshop and assessment of the situation of African honey trade, we recommend that you read the article published in Bees for Development Journal 81 (December 2006). This is also provided here for you to download free of charge.

OPENING REMARKS & SPEECHES

Welcome

by Director of Animal Resources, Dr. William Olaho Mukani.

The Director of Animal Resources welcomed all the participants to the Workshop. He led the self-introduction of the participants and thereafter welcomed the Minister of State for Agriculture, Animal Industries and Fisheries, Rt. Hon. Bright Rwamirama to make his opening remarks.

Opening remarks

by the Minister of State for Agriculture, Animal Industries and Fisheries,
Rt. Hon. Bright Rwamirama.

In his opening remarks, the Minister expressed his gratitude for being part of the African Honey Trade Workshop. He expressed concern about the fact that less than 10% of bee production potential has been utilised in Africa. He indicated that the government of Uganda is putting emphasis on value addition and increased agricultural production in order to fight poverty.

The Minister encouraged different stakeholders in the honey trade sector to take advantage of the favourable environment in Africa and increase the production and foreign marketing of honey. He indicated the Government's willingness to support the production and marketing of honey.
OFFICIAL OPENING
by the Honourable First Lady, Mrs, Janet Museveni (MP)

In her opening remarks, the First Lady said that she was greatly honoured to meet African beekeepers and needed assurance that the Uganda Beekeepers Association was still active. She indicated her interest in honey production and her efforts to promote the beekeeping industry in Uganda include working with UWESO in different districts in Uganda to produce and pack honey for sale. She also mentioned her role in mobilising and encouraging Uganda’s beekeepers to form an association for promoting the honey trade in Ugandan communities, with the view that the association will bring unity amongst beekeepers and provide guidance on production and marketing of honey as a community activity.

She pointed out the opportunity for Uganda, and Africa as a whole, to penetrate the world honey market by filling the gap created by China, which has in the past been forced out of the EU honey market because of impurities in Chinese honey. Since China had been Europe's largest honey supplier, this has created a shortage of honey of the required standard*.

She encouraged beekeepers in Africa to take advantage of the unpolluted environment of Africa and promote African honey on the world market. She strongly encouraged the formation of a beekeepers association to help strengthen the Ugandan beekeepers capacity to penetrate the honey market both locally and internationally.

The First Lady advised the beekeepers in Africa to first explore and satisfy the local markets, and by this process, to build their capacity to meet international market requirements. She called for joint efforts from different players to enable Africa to penetrate the world honey market and indicated that the Uganda Government is ready to do all it can to assist honey producers and promote access to the international market.

* China is now permitted to sell its honey to Europe again, having improved its quality control procedures.
INTRODUCTION TO THE AFRICAN HONEY TRADE FORUM
Bob Malichi, NWBP Zambia

In his keynote address, Mr Malichi gave the background to the Africa Honey Trade Workshop. He informed participants that, in August 2005, a Honey Trade Workshop was organised in Dublin by Bees for Development and was attended by beekeepers, extension workers, civil servants and business people from Africa and honey importers from Europe. The Workshop formed part of Bees for Development’s African honey trade Project, funded by DFID/BLCF.

It was at this workshop that it was realised, by the representatives from Africa, that honey is an important trade commodity and the EU is a big buyer, but whilst other continents and countries export honey to the EU, very little African honey is entering this market. Furthermore, it is estimated that less than 5% of Africa’s potential for honey production is currently exploited. It was realised that there is need to build a name for African honey.

It was agreed to have an African Honey Traders Workshop to discuss the formation of the African Honey Trade Forum, through which the issues of increasing honey export from Africa can be addressed.

He expressed the need to assist small-scale honey producers to penetrate the market. He gave the example that the first honey sent by NWBP to Europe in the 1980’s was rejected in the European market because of quality concerns. The honey had overstayed in transit and was termed “dangerous to human consumption”. Later on they tried again after addressing the issues of quality, and their honey is now considered to be some of the best in Africa.

He pointed out that before you start exporting honey to the world market, you need to first establish the market, meet the basic requirement of the European market, the packaging material should withstand the pressure in transportation and you must have export documentation. The different requirements are at times difficult for the African honey producers – hence the need for the formation of the Forum.

The Forum will help to address the issue of marketing a product that is produced by many small-scale producers. It is important to assist small-scale beekeepers to sell honey through collective organized marketing since honey importers do not want to deal with small-scale farmers. He hoped that the workshop would be able to address the above-mentioned issues for the good of the poor people in Africa.
THE AFRICAN HONEY TRADE FORUM
Harun Baiya, SITE, Kenya

- **Honey Trade Workshop** organised by **Bees for Development** - 12 countries developing countries.
  - Accessing the EU markets - issues of 'Residue Monitoring Plans'.
  - Participants were reps from 12 countries and packers/importers of honey.

- **Beekeeping Congress** was being held for the 39th time.
  - 7 standing commissions - technology, apitherapy, biology, rural development, pathology, pollination and bee flora, beekeeping economy.

- **Participation by country and regional teams** – strong presence of Southern American Companies (Uruguay Argentina, Chile), India, China, Central Asia and East Europe and Central Europe.

- **Private companies** - suppliers of equipment, packers and sellers of hive products (apitherapy products in particular), drug companies (treatment of bees).

- **Notable absence** - virtually no stand from Africa (the only stands featuring African apiculture and honey were Baraka College, Kenya and **Bees for Development**, UK)

**Insights**

- **Honey is an important traded commodity** - UK in 2004 imported $51m (CIF) worth of honey.
- The EU is a big buyer.
- Trade volumes change a lot over years—especially for bulk honey used for blending. However, accredited brands and speciality honey is growing rapidly in the EU.
- There is an impact of bee diseases on the markets—e.g. US has 100,000 ton deficit
- The sources of honey also vary a lot, producing honey of varying quality (standards, weather, domestic markets—e.g. Mexico, trading arrangements).
- Some countries in EU re-export (e.g. Germany—largest exporter in value), UK largely use table use (80%).
- Main producers/exporters-China, Chile, Uruguay, Argentina, Brazil, Vietnam, New Zealand, Australia.
- The markets for bulk blending honey have been very competitive and seen price variations, but niche markets for natural and organic honey has been growing.
- The two accreditations of organic/Fair Trade results in up to 50% more FOB.
- Buyers in the EU and increasingly USA are aggressively seeking honey with the two accreditations—herein lies the opportunity for African beekeepers
Africa/Regional Issues

- The participation of Africa in honey markets is very low indeed—hardly recognised (evidence from the international arena).
- Less than 5% of Africa’s honey production potential is exploited and there is little for export.
- **Why talk about or focus on export in the first place** - it is a key strategy for rapid and competitive growth, and experience shows it works - makes good business sense.
- Niche buyers with the two accreditations or at least one of them.
- Need to build a name as a source of honey serious for buyers to look at.
- Overcoming the negative image of Africa honey (example).
- Increasing productivity and marketing.
- New competition coming from Central Asia – growing sources of natural/organic honey.

Uzbekistan

![Image of barrels in a warehouse](image)

**Immediate response by regional actors**

- A decision to increase our voice and presence in the apiculture field
- Representatives from 8 countries established a forum and presented a case to the Apimondia governing body and set an agenda
- Began a process of opening access to the niche markets for African honey
- 2 Resolutions
- Private Companies, importers keen to support this process
RESOLUTIONS
Apimondia: Standing Commission Beekeeping for Rural Development

RESOLUTION 1
Establishment of a new Working Group
The Eastern and Southern African representatives at Apimondia 2005 Dublin have resolved to start a regional forum aimed at promoting honey trade in Africa, under the auspices of the Apimondia Standing Commission Beekeeping for Rural Development.

The Group have set up an interim Steering Committee that will facilitate the organisation of a meeting to be held in Uganda in May 2006. This meeting will formalise the operations and functions of the Working Group.

RESOLUTION 2
Increasing honey trade opportunities for small-scale African beekeepers

It is recognised that the beekeeping sector holds potential for creating sustainable incomes for Africa’s rural beekeepers, but this potential is hardly tapped because these producers do not have access to infrastructure and organisational systems to allow them to reach the niche/speciality markets their products would otherwise reach, especially in the EU.

To open new market opportunities for these beekeepers, a resolution is hereby made for the Fairtrade Labelling Organisation (FLO) to take cognisance of the situation in Africa, and put in place a system of recognising and registering small-scale private sector firms that are linking the producers to buyers in the fair trade market. A detailed proposal on how these firms will address the principle guidelines of FLO will be submitted to FLO for action.

Comments on Policy

- The level of government leadership is generally weak or at early stage—TZ seems quite ahead in some aspects. Ethiopia is advanced as well.
- Industry players need to be better organised as a country source.
- Governments need to put their own trade facilitation legislations, including domestic and international specs and standards and compliance—has to be at country level.
- Regional interests for harmonisation and trade promotion (e.g. Uganda taking lead) e.g. to deal with exports in regional trade blocks, disease, research etc.
- Greater private sector leadership (examples in other sectors in Kenya).

‘Doing honey is good business’
BEES FOR DEVELOPMENT’S WORK TO PROMOTE THE AFRICAN HONEY TRADE
Nicola Bradbear, Bees for Development, UK

Brief introduction to Bees for Development

- Who we are
- Philosophy
- Work in progress 2006
  - Information Service
  - BfD Journal
  - African honey research project
  - Other work: Asia, Africa, Caribbean

We are based in UK
We have full time, part-time and volunteer staff

The philosophy of Bees for Development

- To alleviate poverty by means of beekeeping
- To encourage conservation and biodiversity maintenance

Apiculture - is significant for strengthening livelihoods of the rural poor
Activities

We provide information on beekeeping to development organisations world-wide.

Information service

- We answer, free of charge, every enquiry from a beekeeper or project in a developing country
- In 2005 we responded to over 3,000 enquiries
- Resource-packs are sent to workshops and training programmes
- We publish *Bees for Development Journal*
- Provide free publications
- Website
Physical constraints

- Rural beekeepers have problems to access suitable containers
- Access to roads and transport

Financial resources

- Informal routes
- Marketing initiatives need access to credit
Social resources

- Beekeepers gain much from self-help organisations
- They need well informed support

Activities

RESEARCH: AFRICAN HONEY PROJECT

- A 30-month DFID-BLCF(UK Govt) funded project
- Concerned with enabling African honey producers to meet EU import requirements

The honey market wants residue-free honey

- Today, buyers’ first test on honey is to test for drug residues

In the future: social and ecological certification of honey

- Criteria for fair-traded honey:
- Sustainability of production
- Organisation of beekeepers & honey hunters
- Fair payment

We hope that this Workshop leads to more trade for African honey!
WHAT ROWSE HONEY LTD NEEDS FROM POTENTIAL TRADERS

Peter Marshall, Rowse Honey Ltd, UK

Introduction

Rowse Honey Ltd, part of the Wellness Foods Group, is a major UK packer of honey, purchasing supplies worldwide (although not from Africa since supplies from Tanzania, the only origin so far explored, dried up about 4 years ago), and packing into retail glass and plastic jars and into various larger containers for Foodservice and industrial customers. We are suppliers to all of the major UK supermarket chains, either under the Rowse name (the brand leader) or under the retailers’ own names. Our turnover is about $75 million, but this includes our other products, which are maple syrup and sweet sauces.

We classify our raw honeys into two groups, Blending honeys and Speciality honeys. Speciality honeys are those which are restricted to a specific floral origin (Acacia, orange blossom, etc), or to a specific geographical origin (Greek, Mexican etc), or to a specific ‘type’, such as organic. We supply about 30 different speciality honeys. Blending honeys are those that can be used in creating a blend or “blossom” honey, and can be of any origin provided the colour and flavour profiles, and the price, are within acceptable parameters.

There are therefore two potential opportunities for African suppliers, which are blend and speciality honeys. A speciality honey would command a higher price than a blending honey. This is NOT because the inherent quality of the honey somehow differs, but because a) the market will bear a higher rate for genuine Specialities, and b) supply of a Speciality is inevitably more restricted as there will be only a limited crop, and of course, there is no substitute once that crop has been harvested and sold.

If a Speciality honey were to be offered, we would need to seek advice from the supplier as to the reason it was so special, so that we can describe it on the label. For example, it might be predominantly from the blossom of a specific plant (e.g. coffee, banana,) or it might be generally from the banks of a particular river, or from a particular mountain region etc. We could advise on the sort of things that would be relevant, but the supplier would need to be ready with something interesting to tell us.

Please note that if ‘organic’ honey were to be offered to us, it would need to be properly certified as such by a recognised authority.

First Hurdles

Before approaching Rowse Honey with an offer, there are two fundamental hurdles which should first be addressed.

1. The honey must originate from a source approved by the EU authorities. For Africa, the only current sources are Kenya, Uganda, Tanzania, Zambia, and South Africa. It is perfectly possible for another country to be added to the list (as Uganda itself was fairly recently), but that would be a matter for the country concerned to negotiate with the EU authorities. Honey from an unlisted origin will be refused entry to the UK at the port.
2. A supplier must have a reasonable annual volume for sale. The absolute minimum would be a 20 tonne container load, but realistically we would seek 100 tonnes per year. Below this, it is difficult to justify the costs of evaluation and difficult to make a sensible offer to our retailer customers, some of whom have over 400 major outlets throughout the UK.

**Other Requirements**
I have identified eight further points to consider when putting a supply offer together.

1. **EU and UK legislation compliance**
   There are two quality aspects which need considering. The first is that the honey must comply with all prevailing EU and UK legislation regarding HMF, moisture levels etc. Particularly important here is that illegal residues must not be present. Another Presentation will go into detail here, but it is unlikely that African honey will suffer from any problems in this respect. However, it is important that beekeepers do not start to resort to spraying undesirable substances into the hive as a “cheap” way of increasing yields. No matter how many certificates or samples we receive from the supplier to show us the quality of a delivery of honey, we *always* test the bulk ourselves on arrival, and if anything untoward is found, we would have to reject the honey.

2. **Flavour and colour profile liked by consumers**
   The second aspect of quality is that the honey must match the flavour and colour profile which our customers expect. The smoky flavour of much African honey is not very popular in England, and while a distinctive-tasting or dark colour honey could possibly have potential as a Speciality honey (there is no guarantee), a blending honey which is not fairly bland in flavour or is darker than 50mm colour is unlikely to be of much interest.

3. **Traceability**
   By UK law, every drum of honey we buy must be traceable right back to the individual beekeeper(s) who supplied it. This is usually done by means of an indelible coding on the drum, but it does of course mean that everybody in the supply chain, from the beekeeper upwards (or certainly the exporter), will need to keep careful records of where each drum went and at what date. If this seems a daunting task, I can only say that nowhere else in the world, even where there are many thousands of beekeepers, has found this to be a problem.

4. **Professionalism**
   Please be easy to contact. Email is best. We need to be able to contact you easily in the event of any query. Please despatch honey when you say you will. If there are any problems, tell us in advance. There is nothing more annoying than expecting the imminent arrival of a delivery only to find it is still somewhere else. It would make planning and maintaining supplies to our customers very difficult. Packaging
   The packaging should be suitable for food use and suitable to withstand the journey from Africa to England. The best method of achieving this is to pack into 300 kilo steel drums, without inner bags, certified for food use. These do not have to be new drums, but if they are not, it is important to make sure that they are filled clean and did not previously contain a non-food item or anything that could contaminate the honey or impair its flavour.
5. **Terms**
   Ideally, we would prefer a price to be quoted delivered duty paid to our premises at Wallingford, England, but this may be difficult for a new supplier, so a price c&f UK port would do, in other words inclusive of all costs up to arrival in the UK. Rowse Honey would then pay the import duty (usually 17.3% of the c&f value, incidentally, although there are exceptions), Customs clearance, and the cost of transport from the port to our factory. What is not of interest is a price ex works at origin or FOB (meaning as at the port of departure in Africa). This is because Rowse Honey has no expertise in international freight and we do not wish to be involved in arranging ocean shipping from Africa. We do not have the manpower to tackle this properly. A price can be quoted in UK Sterling, US Dollars or Euros - it does not matter.

6. **Auditing and monitoring**
   We may wish to visit your plant at a mutually convenient time and carry out an audit to ensure that specifications are being followed.

7. **Price**
   Subject to the above comments about Specialities commanding a higher rate, the price would have to be competitive against substitute honeys in the world market. This would need to be negotiated at the time, as of course prices are fluctuating all the time. As at today, Argentina honey prices (Argentina being a major source for Rowse Honey) are around US$2,400 delivered, US$1,980 c&f UK port.

**Summary**
Rowse Honey is very keen to expand its purchases from Africa, but it must do so within the realities of a very competitive commercial world. I hope these points have assisted to identify what needs to be done, but perhaps the key message is that volumes need to be available. Without a guarantee of supply continuity in reasonable volumes, we cannot even make a start.
WHAT MAYA FAIR TRADE LOOKS FOR, REQUIREMENTS AND HOW THE COMPANY MEETS AND PROMOTES MARKET DEMAND

Benoit Olivier, Maya Fair Trade, Belgium

SUMMARY

- 'Maya group': MFT and MMH.
- The producers of the Maya honey: now and tomorrow.
- What do we look for?
- What are our requirements?
- Can we find what we look for?
- Finally, how do we meet and promote market demand?

'Maya group': MFT and MMH

- Maya Fair Trade scrlfs is a cooperative; its job is to import and sell honey from FLO agreed producers.
- Miel Maya Honing asbl is an NGO: it will be presented tomorrow.
- Maya honey started in 1975 (Liège, Belgium).

Maya Fair Trade scrlfs

- Maya Fair Trade is a 100% fair-trade importer.
- Yearly imports of honey:
  - 2000: 100 tons
  - 2004: 200 tons
  - 2007: 300 tons

Maya products

- 50% turnover = honey
- 50% turnover = products made with honey and other FLO products
- (sweets, speculoos, 'pains d'épice', 'nougat')
The producers of the Maya honey: now

- Since 1975, Maya honey comes only from Mexico and Guatemala.

The producers of the Maya honey: tomorrow

- Nicaragua and Argentina in 2007?
- Until now, we never bought honey from Africa.
- First trip to Africa: July 2006 (Burkina-Faso)
- MFT is ready to widen its geographical reach.

What do we look for?

- Polyfloral honey (FLO certified)
- Specific honey (FLO certified)
- Organic honey (FLO certified)

Specific honey

- Azahar (orange honey)
- Acahual honey
- Cuchumatanes honey
Why not add an African honey to this game, as a specific honey?

What are our requirements? Honey of good quality!

Basically:

- No residues of antibiotics
- Moisture: 18% maximum
- HMF: 10 mg/kg maximum
- Filtered, without wings or legs of bees!
- No smoke taste, no iron taste.
- New drum

Analyses

- Sampling of each drum; 25 g./drum to be sent to Belgium;
- Analysis take 2 or 3 weeks;
- Shipment only after analysis.

Quality control

Issues:

- Use of fire (*during harvesting)*;
- Storage: time and place (*if temperature is high, HMF will increase quickly)*;
- Traceability (*administrative rigour)*.

What are our requirements? Contractual relationship!

- One-shot contract or multi-year contract (3 years);
- Comply with the full content of the contract:
  - Quality
  - Quantity
  - Delay
  - Documentation
  - Price
- Payments: advance is only 60%!
What an importer CANNOT accept?

- Non-compliance with the contract: two examples.
  - Not giving us notice of an existing problem:
  - Any problem has its solution, but if you do not communicate your problem, we cannot find its solution!

Can we find what we look for?

- I mean: between the Fairtrade producers?
- How can we achieve a professional relationship working in the Fairtrade movement?
- How to reconcile the market’s requirements in Europe and the situation where the producers are living?

Being a translator between two different worlds

- We hope we can manage what is unforeseen.
- And you? How can YOU anticipate what is unforeseen? How can YOU manage it?
- What is unforeseen is mainly:
  - The capacity of the producers to provide the quantity of honey they have committed themselves.
- It may NOT depend on climatic conditions!

Having sufficient alternative to be able to face anything...

- It is very difficult to be ready to face the unforeseen, when you do not know how to solve short term problems you see and live.
- Perhaps this will be the major unfairness/injustice between North and South countries.

Finally, how do we meet and promote market demand?

- Increasing quantities to buy: we are looking for honey.
- Promoting: now we are trying to meet the demand...
- Advertisement: during the National Fairtrade week in Belgium
- Relationship with MMH: educational work (see my second presentation).
WHAT HAPPENS TO HONEY ONCE IT IS IMPORTED INTO THE UK – MARKET CHAIN AND CONSUMER TRENDS

Rebecca Howard, Tropical Forest Products, UK

UK imports during 2005

UK imports: Market share by country during 2005
Germany imports: Market share by country during 2005

The niches within the British honey market

- Blended honey: 454g @ £1.78 (£0.39/100g)
- Manuka (healing) honey: 250g @ £4.99 (£2.00/100g)
- Superior-grade, supermarket-brand, Orange Blossom honey: 454g @ £2.39 (£0.53/100g)
- Rowse Chilean Fairtrade honey: 340g @ £1.75 (£0.52/100g)
- Tesco's Organic honey: 340g £1.99 (£0.59/100g)
- Fair trade, organic Zambian honey: 454g @ £2.57 (£0.57/100g)

Where are these honeys sold? Examples of retail outlets and what types of honeys are found in them...

- Large supermarket
- Wholesale via catalogues
- Local health food shop
- Oxfam shop: Fair trade food
- Upmarket delicatessen

How can you offer a competitive product?

- Supply in bulk
- Add value by being a reliable and reputable supplier
- Find the niche that your honey could fit into
- Add value through branding and marketing your honey with a story
What are your strengths and how can you communicate these to the buyer?

- Through example
- Through openness and accountability
- Through membership to an organisation which can vouch for your credibility
- Through certification

**Strengths might include:**

- Economic strengths (low costs, low overheads)
- Flexibility (e.g. able to meet delivery dates, deal with increasing demands)
- Good communications and relay of information within your organisation as well as with customers
- Staff: well-motivated and highly skilled
- Good knowledge and experience of the product
- Good knowledge and experience of the market and export
- Good reputation
- Sound finances
- Proper storage facilities
- Good quality control mechanisms in place
- Good cleanliness and hygiene in operations
- Fair price paid to producers

Finding the niche that your honey could fit into...

- Start by looking at the product you are offering:
- What are its distinguishing features?
- How do these fit into the market situation you are trying to access?

**Price?**

- Impossible to compete with large suppliers like China and Argentina in terms of price;
- How can you convince the buyer that your product is worth more?

If China and Argentina are selling their honey to customers in the U.K. for as little as £0.54/kg, what must they be paying their producers? The truth is that in order to produce such a cheap honey, production is organised totally differently, on an industrial scale.

**Characteristics of the honey (value intrinsic to the product)**

What makes your honey special?

- Taste;
- Texture;
- Colour;
- Floral source;
- Healing properties
Remember that most of the imported honeys on the market in the U.K. and Germany are fairly pale, mild honeys, similar to the ones produced in Europe. This means that there is still a need to educate consumers about the diverse range of honeys produced and why they should risk trying an African variety they are not used to.

**Added benefits**

- Certification (e.g. Organic, Fair trade, UMF)
- Telling an interesting story

**Two examples**

1. **New Zealand manuka honey**

   - Used to be one of the cheapest honeys on the market
   - Now price varies from £6000 to £26000 per tonne for bulk honey!
   - Thanks to the discovery of Unique Manuka Factor, and to clever marketing and publicity.

   Over the last decade, New Zealand manuka honey has transformed from being a low value honey, used mainly for industrial purposes; to being a high value honey much sought after by patients and doctors alike, to treat external wound treatment as well as internal digestive complaints. The reason is down to the discovery of a unique antibacterial property produced by the enzymes in manuka honey (called ‘Unique Manuka Factor’) which is purportedly more persistent and stable than that found in other honeys. The credit is awarded to the Honey Research Unit in New Zealand who have proven the unique properties of manuka honey, as well as the massive scale media coverage which has publicised the story. The value of the honey varies according to the UMF standard it carries, which is set and controlled by one laboratory within New Zealand. Packaging the honey in New Zealand allows for greater control over the Manuka brand (although laundering still does happen).

2. **Tropical Forest Zambian honey**

   When Tropical Forest first attempted to sell Zambian honey, they were met with suspicion from other honey packers in the industry who thought that no-one would want to buy a dark, strong-tasting honey so different from British honey and the other mild honeys on the U.K. market.

   Now, we have a rapidly growing loyal customer base, who keep coming back because they like the taste and the story behind the honey.

   One of our largest customers, a chain supermarket called Morrison's who have over 360 stores across the U.K. have been stocking our honey in some of their stores since October 2005. The buyers actually prefer the dark clear honey over the lighter set honey, precisely because it is different from all the other varieties they stock.
Opportunity for Africa!

- Premiumisation of markets in the U.K.
- Interest in fair trade and organic products
- Representation of African honey in the various retail sectors

The U.K. has seen a premiumisation process in its markets over the last few years. As people have increasing incomes to spend, they are getting more interested in different varieties and higher quality of products.

Marketing has become ever more important and the approach taken focuses on consumers and how to present them with the products they need, rather than conning them into buying what they don't want.

Of course the low value products still exist at the other end of the scale, but honeys like Gales are becoming less and less popular.

In Germany, this same process is not so evident in the case of honey. Notably, the industry is controlled by a few very large packers who have consistently believed in selling consumers the mild honeys they think they want. The fact that honey sales are diminishing in Germany perhaps suggests that these honey packers don't really know what consumers want anymore.

Demand for Fair trade and Organic foods is on the increase, as one aspect of this premiumisation process. Increasing demand must be matched with increasing supply so there is an opportunity for more fair trade, organic African honeys to enter the market. What we can't be sure of though, is the stability of these labels, since the messages get so simplified by the time they reach the consumer, and any negative media coverage of 'fair trade' and 'organic' is a threat.

Currently our Zambian honey occupies a place in most of the retail sectors on the U.K. market, from one of the most expensive delicatessens in London, to the larger supermarket chains, as well as across the country in smaller health food shops and some small corner shops. It is also occasionally sold by people at markets and community fayres. This is all helping to increase people's awareness across the U.K. of African honey.
STEPS NEEDED TO ACHIEVE EU ACCREDITATION FOR HONEY EXPORT

Gudrun Beckh, Quality Services International GmbH (QSI), Germany

QSI INDUSTRIAL CARE

Quality Management/Quality Control
Bee products
Flavour and Perfumes
Essential Oils
Natural extracts
Pharmaceuticals
Analysis of Residues in:
- Food, Food Products
- Natural Food
Microbiology

Development
Formulation for:
- Phytopharmacies
- Cosmetics
Analytical Methods

Education/Support
Quality Management:
- HACCP
- ISO 9000
- EN ISO/IEC 17025
Organic production:
- authorised inspection body
- Organic EC 2092/91

Bremen
**Education/Support**

**Quality Management / Quality Control of Bee Products**

- HACCP (Hazard Analysis Critical Control Point)
- ISO 9000 ff
- Carry out the appropriate external audits
- Consulting of companies
- Licensed institute according to EN 17025

**Organic Production (Natural Food / Natural Commodities)**

for trading with products from organic production special care must be taken.

- Give assistance/support in fulfilling the legal regulations and duties
- Act as authorised private inspection body according to the regulation (EC) No 2092/91 and 1804/99.

**Quality Management / Quality Control of Bee Products**

Means:

- **analysing honey** types from all over the world on origin and quality
  main subjects are: - control of residues (anti-Varroa chemicals, antibiotics, pesticides) -
  HMF, moisture, diastase, pollen, sugars, acid degree, proline, pH-value - sensory (taste, odour, appearance)
- **analysing bee products** like royal jelly, pollen, propolis or beeswax
  delivery of information and analysis of contents, adulteration and residues
- give **consultancy** for all honey importers and packers in Europe concerning quality control of their products.

---

**European Community**

Bees produce honey from plant sources > HONEY = ANIMAL PRODUCT

The European Commission is more and more focusing on the Quality Control of foodstuffs especially of animal origin.

Through this:

- The regulation concerning the quality control of honey have strongly increased.
- The honey market is concerned by an increasing number of residue problems.
- The honey trade is influenced by negative incidents caused by residues of not permitted substances in animal food
e.g. in the case of Chloramphenicol (CAP) this has led to a complete ban of imports from China (2002-2004).

**European Community Legislation**

- **Council Regulations** law in every member state
- **EC Directives** shall be adopted in member states no legal force until promulgated by national parliament
- Horizontal legislation refers to all food stuffs e.g. for contaminants, additives, labelling Regulation EEC 2377/90 (maximum residues limits for veterinary drugs) Directive 96/23/EC (monitoring)
- Vertical legislation refers to specific products e.g. Honey Directive 2001/110/EC Directive 2002/337/EC (list of third countries allowed to import honey from)

**Commission Decision 2006/208/EC of 7 March 2006**

...amending Decision 2004/432/EC on the approval of residue monitoring plans submitted by third countries in accordance with Council Directive 96/23/EC.

These third countries submitted a residue monitoring plan according to honey:

- Argentina
- India
- San Marino
- Serbia
- Australia
- Jamaica
- El Salvador
- South Africa
- Bulgaria
- Kenya
- Thailand
- Zambia
- Belize
- Kirghizia
- Turkey
- Canada
- Mexico
- Taiwan
- Switzerland
- Nicaragua
- Tanzania
- Chile
- Norway
- Ukraine
- China
- New Zealand
- Uganda
- Cuba
- Pitcairn
- USA
- Guatemala
- Paraguay
- Uruguay
- Croatia
- Rumania
- Vietnam
- Israel
- Russia
- Montenegro

**EU import of animal products from third countries**

**Guidance to the national authorities in third countries:**

- General principles
- Animal health situation
- Residues, contaminants and additives controls
- Food safety standards in processing establishments
- National authority standards
- Country approval procedure (Uganda already approved)
- Health certification
- Border inspection upon entry to the EU
- Initial contact point
- Health and Consumer protection Directorate-General (DG Sanco)

http://ec.europa.eu/dgs/health_consumer/index_en.htm
General principles: Particular account is taken of e.g.:

- Health status of livestock/diseases
- Legislation of the country on live animals and products of animal origin
- Organisation of competent veterinary authority
- Training of staff in the performance of official controls
- Existence and operation of documented control procedures
- Hygiene conditions
- Use of veterinary medicinal products/legislation
- Residue control programme
- EU import of animal products from third countries

Animal health situation

- Third country must be member of OIE (world organisation for animal health)
- Laboratory facilities for detection and confirmation of diseases (major serious outbreaks have to be communicated within 24 h after confirmation)
- Animal disease control systems must be in place

Residues, contaminants and additives controls

- Legal controls over prohibited substances
- Monitoring programme for these substances

Monitoring System

Basis for the import to the European Union


The Directive lays down:

- Guidelines for the residue control in animals and in their products
- Detailed procedures to set up a National monitoring plan
- Details on sampling procedures
- The set of substances and groups of residues that must be monitored (Annex I).

Annex I to Directive 96/23/EC

GROUP A – Substances having anabolic effect and unauthorized substances

- Stilbenes, Stilbene derivates, and their salts and esters
- Anti-thyroid agents
- Steroids
- Resorcylic acid lactones including Zeranol
- Beta-agonists
- Compounds included in Annex IV to Council Regulation (EEC) No 2377/90 of 26 June 1990 e.g. Chloramphenicol (CAP)

**GROUP B – Veterinary drugs (1) and contaminants** (see also (EEC) No 2377/90)

**Antibacterial substances, including sulphonamides, quinolones**

**Other veterinary drugs**

- Anthelmintics
- Anticoccidials, including Nitroimidazoles
- Carbamates and Pyrethroids
- Sedatives
- Non-steroidal anti-inflammatory drugs (NSAIDs)
- Other pharmacologically actives substances

**Other substances and environmental contaminants**

- Organochlorine compounds including PCBs
- Organophosphorus compounds
- Chemical elements, e.g. heavy metals
- Mycotoxins
- Dyes
- Others

Including unlicensed substances which could be used for veterinary purposes
Veterinary drugs and contaminants are controlled in:

<table>
<thead>
<tr>
<th>Substance categories</th>
<th>Bovine</th>
<th>Porcine</th>
<th>Ovine</th>
<th>Caprine</th>
<th>Equine</th>
<th>Poultry</th>
<th>Fish</th>
<th>Milk</th>
<th>Eggs</th>
<th>Rabbit</th>
<th>Honey</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>

Honey

Substances or group of substances to be monitored mandatory:

- Group A 6: Compounds included in Annex IV to Council Regulation 2377/90/EEC
  - Chloramphenicol, Nitrofurans
- Group B 1: Antibacterial substances
  - Streptomycin, Sulphonamides, Tetracyclins, Tylosin

Other groups of substances that should be monitored:

Carbamates and pyrethroids (B 2c), organochlorine compounds incl. PcBs (B 3a), organophosphorous compounds (B 3b), chemical elements (B 3c)
Sampling frequency

Number of samples/year analysed by government laboratories or laboratories acting for the government under contract:

- 10 per 300 tons of annual production for the first 3000 tons
- 1 sample for each additional 300 tons

Breakdown for single groups:

- B 1 and B 2c: 50% of the total number of samples
- B 3a, b, and c: 40% of the total number of samples

FVO (Food of Veterinary Office)

The Commission is responsible for ensuring that Community legislation on food safety, animal health, plant health and animal welfare is properly implemented and enforced. Therefore they conduct inspections on spot:

- in member states on special topics e.g. Germany/BSE control
- in EU candidate countries to assess countries readiness e.g. Bulgaria/Residues
- in third countries to ensure that competent authorities correctly apply relevant EU standards e.g. South Africa/Pesticides

FVO inspection: Brazil

- Unsufficient quality control analysis
- Procedures have to be harmonized with EU ones
- National residue control plan is insufficient and not implemented, official labs not capable of testing adequately
- Free availability of most veterinary drugs and absence of requirements on documentation of use
- Export of honey in absence of any testing
- Since 17-March-2006 embargo against Brazilian honey
- Six months deadline to restructuring national programme in order to adapt to the EU export norms

FVO - You can find FVOs

- Inspection programmes
- Inspection reports
- Annual reports
- Special reports

under: http://ec.europa.eu/food/fvo/index_en.htm
EU import of animal products from third countries

Food safety standards in processing establishments

- HACCP principles
- Effective official control system, incl. documented records of control actions
- Independence of operators/supervisory systems
- Establishments must meet EU standard

HACCP

HACCP (Hazard Analysis and Critical Control Point) is a tool of the hygiene management

The HACCP principles (laid down in Annex II Hygiene Regulation 852/2004) have to be adopted by companies which produce, deal, pack, store and export honey.

The appliance is no voluntary act but required by law and has to be confirmed by the companies.

EU import of animal products from third countries

National authority standards

- National authority must be able to deliver the level of veterinary controls required
- Questionnaire to national authority e.g. management structure, independence, resources, personnel, recruitment and training, legal/enforcement of powers, prioritisation and documentation of controls, laboratory services, import controls, animal health controls, food safety controls

Health certification

- Imports of animal products into EU must be accompanied by the health certification laid down in EU legislation
- Strict rules on production, signing and issuing of certificates
- Original version of certificate must accompany consignments
- Each category of animal and product has its own set of requirements

Border inspection upon entry to the EU

- Products must enter via an approved Border Inspection Post (BIP), located in a member state of EU
- Animal or product must be subject to official veterinary checks in border inspection

Initial contact point

Directorate D, Health and Consumer protection Directorate-General, European Commission, Rue Froissart 101, B-1049 Brussels
Tel: +32 2 2953641
Fax: +32 2 2964286

http://ec.europa.eu/food/index_en.htm
EC Directives and Regulations concerning Honey

- Honey Directive 2001/110/EC
- Regulation 2377/90 regarding residues of pharmaceutical active substances
- Food Safety Regulation 178/02
- Pesticide Regulation 396/05
- Hygiene Regulations 852-854/04

website: [http://www.europa.eu/]  

EC Honey Directive


Art.1 Where the Directive shall apply to (Annex I)  
Which requirements the products shall meet (Annex II)

Annex I

1. Definition

Honey is the natural sweet substance produced by Apis mellifera bees from the nectar of plants or from secretions of living parts of plants or excretions of plant-sucking insects on the living parts of plants, which the bees collect, transform by combining with specific substances of their own, deposit, dehydrate, store and leave in honeycombs to ripen and mature.

2. The main types of honey are as follows:

a) According to origin
i) Blossom honey or nectar honey
ii) Honeydew honey

According to mode of production and/or presentation
i) Comb honey
ii) Chunk honey or cut comb honey
iii) Drained honey
iv) Extracted honey
v) Pressed honey
vi) Filtered honey (new) - honey obtained by removing foreign inorganic or organic matter in such a way as to result in the significant removal of pollen.
3. Baker's honey

Honey which is

a) suitable for industrial uses or as an ingredient in other foodstuff which are then processed and
b) may:

Have a foreign taste or odour, or

Have begun to ferment or have fermented, or

Have been overheated.

Annex II

Composition Criteria of Honey

- Honey consists essentially of different sugars, predominantly fructose and glucose as well as other substances such as organic acids, enzymes and solid particles derived from honey collection.
- The colour of honey varies from nearly colourless to dark brown.
- The consistency can be fluid, viscous or partly to entirely crystallised.
- The flavour and aroma vary, but are derived from the plant origin.
- Honey shall not have added to it any food ingredient, including food additives, nor shall any other additions be made other than honey.
- Honey must, as far as possible (except baker’s honey),
  - be free from organic or inorganic matters foreign to its composition
  - not have any foreign taste or odour
  - not have begun to ferment
  - not have an artificially changed acidity or
  - not have been heated in such a way that the natural enzymes have been either destroyed or significantly inactivated.

- No pollen or constituents particular to honey may be removed except where this is unavoidable in the removal of foreign inorganic or organic matter (except filtered honey).

Declaration of Honey

Except in case of filtered honey and baker’s honey the product names may be supplemented by information referring to:

- floral or vegetable origin if the product comes wholly or mainly from the indicated source and possess the organoleptic, physico-chemical and microscopic characteristics of the source
- regional, territorial or topographical origin if the products comes entirely from the indicated source

**Geographical origin of Honey**

New:

- country or countries of origin shall be indicated on the label (Article 2, 4)
- for blends: every country listed or
- blend of EC-honeys
- blend of non-EC honeys
- blend of EC and non-EC-honey

**Difficulties for control:**

'Detection limit' for finding all origins in blends of honey as the percentage is not defined.

**Food safety**


laying down the general principles and requirements of food law, establishing the European Food Safety Authority and laying down procedures in matters of food safety.

*Main points are:*

- The regulations provides the basis for the assurance of a high level of protection of human health and well-being of citizens, and to their social and economic interests.
- Considers necessary all aspects of the food production chain as a continuum from and including the production of animal feed in order to ensure safety of food.
- For ensuring continuous monitoring networking of laboratories of excellence, at regional and/or interregional level play an important role.

**Food Safety**

**§14 Food safety requirements**

Food shall be deemed to be **unsafe** if it is considered to be:

- injurious to health
- unfit for human consumption

In determining whether any food is unsafe, regard should be had:

- the normal conditions of use
- information provided to the consumer concerning the avoidance of specific adverse health effects

In determining whether any food is injurious to health, regard shall be had:

- the probable effects of that food on the health of a person consuming
- probable cumulative effects
- particular health sensitivities of a specific category of consumers

**Risk Communication**

**§ 19 Responsibility for food**

If a food is considered as **not to be in compliance with the food safety requirements** the operator shall:

- initiate procedures to withdraw the food in question from the market where the food has left immediate control
- inform the competent authorities
- inform the consumers of the reasons for its withdrawal and if necessary recall products already supplied from the consumers

**Residues**

*Regulation (EEC) No 2377/90* on veterinary medical products in foodstuff of animal origin lays down what substances are forbidden

*Regulation (EEC) No 2377/90 of 26 June 1990* on veterinary medicinal products in foodstuff of animal origin

- The regulation binds the maximum residue limits (MRL) for veterinary medicinal products in foodstuffs of animal origins.
- Limits are established in accordance with the regulatory committee procedure following scientific evaluation by the Committee for Veterinary Medical Products (CVMP) of the European Medicines Evaluation Agency (EMEA).
- The pharmacologically active substances are classified in 4 Annexes to the Regulation.

**Positive Lists!!**

The lists will be continually updated
EU: allowed veterinary drugs
According to Regulation 2377/90 Annex I (with MRL)
Coumafos MRL 0,1mg/kg
Amitraz MRL 0,2 mg/kg

According to Regulation 2377/90 Annex II (no MRL)
Lactic acid (for all food producing species)
Phenol (for all food producing species)
Oxalic acid (only for bees)
Tau-Fluvalinat
Thymol

No other veterinary drugs are allowed to be used

Pesticides

Pesticide Residues

- Pesticide Regulation 396/05/EC for all foodstuffs incl. honey
- existing national MRLs can still be applied as long as Annex III with new harmonised MRLs will be in force
- if no specific MRL is set a 'standard MRL' of 0,01 mg/kg shall be applied
- Honey as regarded as natural and pure should be as free from residues as possible.
- Industry may/will include requirements in their contracts e.g. specifying compliance with the residue limits stipulated in the European Pharmacopoeia.

Hygiene

EC Hygiene Regulations

- 852/2004 general food hygiene
- 853/2004 specific requirements for food of animal origin
- 854/2004, specific procedures for the official control of food of animal origin

replacing 16 different Directives

What is new?

- primary production is included
- all food producing companies must be registered
- principle of equivalence for imported food from third countries
- HACCP mandatory as well as documentation and self-control except for primary production
- Flexibility for small businesses
Influence on Monitoring Food Quality

International Recommendations e.g. Codex Alimentarius

European Community: EC-Regulations, EC Directives

National Law: German Food Regulation (LMBG) and related Directives e.g. German Honey Directive, Pesticide Directive

Specifications of the Importers

Specifications of the Packers

Trade specifications of Supermarkets

Consumer resp. Consumer journals

Associations e.g. German Beekeeping Association

Exporters resp. factories

Beekeeper

Why is it necessary to define Quality of Honey?

<table>
<thead>
<tr>
<th>WHY</th>
<th>WHY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Legislation in general</td>
<td>Protection of health, Food Safety, economic interests, rights of consumer to redress, the right to information and education, right of representation</td>
</tr>
<tr>
<td>EC- Legislation</td>
<td>Harmonisation between the member states</td>
</tr>
<tr>
<td>Importers, Packers</td>
<td>Control by authorities Quality Management (Assurance) System Product liability Economic interests Requirements of the supermarkets</td>
</tr>
<tr>
<td>Supermarket</td>
<td>Marketing, economic reason Consumer expectations Public opinion Consumers Newspaper e.g. Test, Ökotest, TV</td>
</tr>
<tr>
<td>Consumer</td>
<td>Enjoyment of consumption Expectation of a pure, natural product</td>
</tr>
</tbody>
</table>
Today major factor for quality of honey

- Incorrect apiculture practice
- including hygiene e.g. as prevention of diseases instead of using 'medicine'

Contaminants in honey

**Environment**
- Pesticides
- Heavy metals
- Bacteria
  - Genetically modified organisms (GMO)
- Radioactivity

**Beekeeping**
- Acidicides for Varroa control
- Antibiotics against diseases e.g. AFB, EFB
- Pesticides for wax moth control
- Repellents at honey harvest
- Other contaminants

Plants, Air, Water

- Responsible for official procedures: national authorities
- Bee-keepers have influence on the quality of the product by implementing quality standards and correct treatment
What can we do to improve on honey quality?

Voluntary action to improve honey quality

Producers should at least use as preventive measures

- **GBP** (Good Beekeeping Practises)
- **GHP** (Good Hygiene Practises)

The producers, packers and processors should establish a

- **Quality Management System** (Quality Control, Quality Assurance)

### Contaminants from bee-keeping and control measures

<table>
<thead>
<tr>
<th>CONTAMINANT</th>
<th>SOURCE OF CONTAMINATION</th>
<th>CONTROL MEASURE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Antibiotics in honey</td>
<td>Control of bacterial diseases with antibiotics (AFB, EFB, Nosema)</td>
<td>Alternative control without the use of antibiotics</td>
</tr>
<tr>
<td>2. Synthetic acaricides in bees Wax, propolis and honey</td>
<td>Varroa control with synthetic acaricides</td>
<td>Alternative Varroa control without synthetic acaricides</td>
</tr>
<tr>
<td>3. Pesticides in honey and beeswax</td>
<td>Control of wax moth with pesticides; Chemical control of the Small Hive Beetle</td>
<td>Wax moth control by alternative measures, Alternative control of the SHB</td>
</tr>
<tr>
<td>4. Repellents for honey harvest</td>
<td>Use of synthetic repellents at the honey harvest</td>
<td>Use of smoker with natural material, 'mechanic systems'</td>
</tr>
<tr>
<td>5. Toxic metals or organic substances</td>
<td>Container, drum</td>
<td>Use material which do not diffuse contaminants into honey</td>
</tr>
<tr>
<td>6. Wood protective agents in honey, paints</td>
<td>Pesticides in wood protective agents</td>
<td>Use of wood protective agents containing no pesticides</td>
</tr>
</tbody>
</table>

Control leads to confidence
HOW UGANDA ACHIEVED AND MAINTAINS A RESIDUE MONITORING PLAN

Alice Kangave, MAAIF, Uganda

Introduction

Bee keeping in Uganda started as honey hunting long ago. The following played a major role to improve the bee keeping industry.

- CARE
- FAO
- IDEA
- MAAIF
- UNIDO
- NAADS, MTTI
- BfD

The Process of Standardisation

The process of Standardisation and Certification of Uganda honey for the EU market started in 1999 when UNIDO decided to assist MAAIF in the process.

- Prof. Helmut Horn from University of Honhenheim Stuttgart Germany was contracted
- 1999 a baseline study was conducted
- Honey sample collection from 9 ecological zones of Uganda.
- In 2001, 214 honey samples were harvested directly from the hive and stored in a cooler box from the following districts; Kabale, Rukungiri, Bushenyi, Mbarara, Rakai, Masaka, Kibale, Mubende, Kampala, Mukono, Luwero, Nakasongola, Apac, Lira, Kamuli, Jinja, Kaberamaido, Soroti, Mbale, Tororo, Kumi, Iganga, West Nile, Bwindi and Sembabule.
Honey sample collection

Map of Uganda showing where honey samples were collected

Honey harvesting from top bar hives

Honey sample squeezing and labelling

- The honey analysis was done in Germany and all the determinations were done according to the International standardized methods.
The samples were analyzed for the following:

- pollen analysis
- water content
- electrical conductivity
- HMF content
- invertase activity
- diastase activity
- proline content
- pH value
- fermentation
- free acidity
- lactones and total acidity
- sugars

During the sample collection it was realized that most hives were not colonized so in Sept-Dec 2001, Prof. Helmut trained:

- 78 bee keepers in queen rearing and colony multiplication
- honey packers and processors in honey quality control
- 18 lab technicians in honey analysis

**Training sessions**

In 2003 another baseline study on quality of honey in 5 regions of Uganda was conducted

- 300 honey samples were collected and analyzed by Prof. Helmut
- 144 honey samples were analyzed by Chemiphar laboratory
- Ring trials between Chemiphar lab and the University of Honhenheim resulted in similar results.
- The results gave us the characterization of Uganda honey and were used to revise the Uganda honey standards.
- The formulation of the National Apiculture Policy has been completed and awaiting approval by the cabinet.
- MAAIF developed statutory instruments as a support for the legislature on honey.
- MAAIF coordinated all stakeholders to form an umbrella body called the Uganda National Apiculture development Organization (TUNADO)
TUNADO objective is to bring beekeeper’s associations and other stakeholders together to ease coordination and improve the performance of the Apiculture industry.

The National Honey Residue Monitoring Plan (NHRMP)

- MAAIF in close collaboration with the stakeholders and with assistance from UNBS, UNIDO, UEPB, formulated the NHRMP
- It is a core requirement for countries importing honey into the EU market to submit NHRMP to the EU commission every year
- Mr. Peter Martins from Honey International Packers Association participated in the finalization of the NHRMP for 2005 in Sept.2004 which was submitted in Dec. 2004 to the EU commission.
- This resulted in Uganda being listed among the countries to export honey to the EU market (EU journal commission Decision of 11th March 2005)

Key issues in the NHRMP

INTRODUCTION AND GENERAL INFORMATION

- Legislation concerning the use of substances in Annex 1 (Directive 96/23/EC Article 7.1)
- The legal basis of the Competent Authority
- Infrastructure of the official services
- The Local Authority (Districts)
- Relationship with other agencies (UNBS, TUNADO)
- Institutional framework
- Laboratories
- Level of competence of laboratories
- National tolerance limits for maximum residue limits (MRLs)
- Official Sampling Procedures

BACKGROUND INFORMATION ON PRODUCTION

- Type of production
- Production planned to be exported to EU

RESIDUE MONITORING PLAN

- Objectives of the plan
- Groups of residues covered (Annex 1)

Frequencies and level of controls

TARGETING CRITERIA

- Results from previous years
- Changes based analysis of the residue plan of the previous years.
Comments from EU

- Summary of legislation
- The specificity of samples
- Measures taken if there is a positive case
- The details of substances analyzed
- Response to these comments was made and submitted to EU

Official launching of honey to the EU

- MAAIF
- EU
- TUNADO
- UNIDO
- NAADS
- UEPB facilitated the launching on 3rd May 2005.

The National Residual Monitoring Plan for 2006

- This involved the revision and updating the NRMP of 2005
- The objectives of the plan
- Groups of residues covered (details are found in Annex 1)
- Details of the methods of analysis
- Frequencies and levels of the controls
- Targeting criteria
- Results from previous years
- Changes based on analysis of the residue plan of the previous years

After submission of the NRMP 2006 to EU commission using the previous format they sent us templates which they advised us to use.

Table 1 has the following sections

- General information on the Competent Authority – organisation chart
- The National Residue Control Plan – Legislation
- The Laboratory Network
  - National Reference lab-UNBS
  - Chemiphar Laboratory

Table 2

- Residual Plan

- Group of substance to be monitored
- Compound residual
- Screening method
- Confirmatory method
- Screen method detection limit
- Confirmation method detection limit etc.

**Table 3**

Regulatory Programme for Control of Residuals in Food.
The above topics in table 2

**Table 4**

- Group of substance to be monitored
- Compound of residue
- Number of samples
- Decision limits
- Number of non-compliant results (above decision limit)

**Table 5**

- Guideline on the compounds considered in the NRMP

**Constraints**

- Legislation on apiculture
- High costs to analyse the honey samples for the different parameters

**Way forward**

- Investments - Bee Natural Products
- Implement National Apiculture Strategic Plan
- Implement Apiculture Export Strategy
- Collection centres
- Districts eg. Mukono
- Radio messages
- Law enforcement
- Honey Inspectors
Contact Alice Kangave:
Ministry of Agriculture Animal Industry and Fisheries.
P.O BOX 102 Entebbe.
Tel. +25671273059
Email: akangave@utlonline.co.ug
2006: MIEL MAYA HONING
Benoît Olivier, Miel Maya Honing, Belgium

TOPICS
Experiences of promoting Fairtrade honey in terms of support to producers and encouraging consumer demand.

SUMMARY
- MFT and MMH
- MMH as NGO
- MMH's future and Africa
- Support to the producers
  - Projects
  - Consultancy
- Promoting demand and educational work.

MFT AND MMH: TWO SEPARATE ORGANISATIONS?
- 1975 – 1997: only one organization;
- 1997: splitting in two entities, the NGO and the trade organisation;
- 2006: MFT and MMH have different staff, different board, different place.
- Trend: professionalism; separate tasks. How far?

A BRIDGE BETWEEN MFT AND MMH
- Exception: MFT subcontracts MMH about the relationship with its providers in Guatemala;
- To keep a «bridge» between both activities allows to make:
  - the trade organisation more conscious about the context of its providers;
  - the NGO sensitive to the importance to give outlets to the producers, and the difficulties to gain this outlets.

MMH AS A NGO
Two ranges of activities:
- supporting beekeeping projects in the South (now: only Mexico and Guatemala);
- educational work in Belgium to promote the concept of Fair Trade.

BUDGET
2007 budget:
- 97.000 Euros for beekeeping projects;
- 153.000 Euros for educational work.
Total amount = 250.000 Euros: 75% is financed by the Belgian government.
MFT grants 25% of projects.
MMH looks for 25% of educational work.

**MMH’S FUTURE**

1st May 2007:

- presentation to the Belgian government of our next Program: 2008 – 2013;
- two periods:
  - 2008 – 2010;
  - 2011 – 2013

Only the first period will be detailed on 1/5/07.

**WHAT ABOUT AFRICA?**

- 2008 – 2010: to develop experience and knowledge about African beekeeping and African organisations of beekeepers (activity: consultancy);
- 2008 – 2010: consultancy, but also possibility of supporting projects in Africa.

**MMH AND THE SUPPORT TO PRODUCERS**

- What can MMH offer?
- What MMH cannot offer?

**WHAT WE CANNOT OFFER**

- We are not technicians in beekeeping.
- We know a lot about it, but we have no hives ourselves!

**WHAT WE CAN OFFER**

- MMH tries to get a global vision of how beekeeping can *provide a valuable source of income for small-scale producers*.
- Mostly development issues and trade issues are separate: we try to combine both aspects.

**SCHEME**

- Our scheme integrates Production, Trading, Organisation, Social Impact. We support any initiative which is part of this scheme.
• This scheme is based on our experience in Latin America. Perhaps it will have to be adapted for Africa.

PRODUCTION

Technical assistance to improve:

• total quantity of hives (levels: organization and producers);
• number of hives/beekeeper;
• output/hive;
• quality;
• diversification of products (wax; pollen; propolis).

Fund of micro-credit:

• equipment of the beekeeper: veil, overall, gloves, etc.;
• hives etc.;
• extractor, etc.

TRADE

• Analyse costs: no to claim higher prices, but to reduce costs;
• Ideal: reducing costs by investments in common.
• Export is not the only way!
• Local sales; diversification of products.

Training about export:

• the beekeepers have to be able to control the person in charge of it (often, the manager is not a beekeeper).

ORGANISATION

• Democracy and participation of the beekeepers in their organization
• It means: rights, but also duties, responsibilities and discipline.
• What about Africa? We cannot support a project with individual beekeepers.

SOCIAL IMPACT

• Our aim is not to create a club of privileged beekeepers ("happy few")
• First social impact is on the family
• Second impact is on the community
• Third impact: on the local development (the dream of every donor).

TWO ORIENTATIONS FOR OUR NEXT PROGRAM
- To help new (small) beekeeper organisations to meet the FLO standards; (nowadays, who is working in that field??)
- To help organisations already in the FLO register to develop, especially the most vulnerable of them.

**REFLECTION**

- In general terms, nowadays, the risk is that the Fairtrade movement moves only towards strong organisations, the only ones capable to meet the requirements of the supermarkets.
- The mission of MMH is to pay more attention to the small peasants, who are the people for whom the Fair Trade movement was started 30 years ago, long before the creation of the labels Max Havelaar / Fair Trade.

**CONSULTANCY (beginning)**

- Consultancy is a completely new activity for MMH
- First experience was a mission to Burkina-Faso, in July 2006.

Purpose: to visit a beekeeping project supported by another Belgian NGO.

**PROMOTING DEMAND**

- The Belgian authorities finance educational work of MMH, not advertisement for MFT!
- So this educational work is not exactly aimed to promote market demand in the short term.

**EDUCATIONAL WORK**

- To present and explain the Fair Trade concept to new public (in an open way, critical and not only focused on the Maya products)
- To make the consumer more conscious about the issues of Fair Trade
- To promote a change in the mentality and behaviour of the consumer, with respect to countries of the ‘South’

So this educational work looks for impact in the long term.

**EDUCATIONAL ACTIVITIES**

- Publications: folder, periodical, website, books
- Information and training in the schools
- Pedagogic tools (*jeu de rôles*)
FAIRTRADE LABELLING ORGANISATION &
FAIRTRADE CERTIFIED HONEY

FLO STANDARDS - THE FAIR TRADE PROCESS
EXPLAINED FOR PRODUCERS IN THE REGION

Pascasie Nyirandege, FLO, Rwanda/Uganda

FLO

- THE PRINCIPLES
- THE MISSION
- THE SYSTEM

Labelled Fairtrade: the basic principles

- The basis of FLO’s activities is Fair Trade, defined as:
  - "a trading partnership, based on dialogue, transparency and respect, that seeks greater equity in international trade. It contributes to sustainable development by offering better trading conditions to, and securing the rights of, marginalized producers and workers – especially in the South."

- Central values: partnership, dialogue, transparency, accountability, respect, (gender-) equity, sustainability

FLO International

The Mission:

To enable development & empowerment of disadvantaged producers & workers by:

a) setting international FairTrade standards;

b) certifying production and trade according to international FairTrade standards;

c) developing FairTrade markets through national FT labeling organisations;

d) providing producer support;

e) promoting the FT-approach in debates on trade and development
National Initiatives (20)

- Canada
- USA
- Mexico
- Australia
- New Zealand
- Austria
- Belgium
- Denmark
- Finland
- France
- Germany
- Ireland
- Italy
- Luxembourg
- Netherlands
- Norway
- Spain
- Sweden
- Switzerland
- UK

Fair Trade Labelling System
### FLO’s STRUCTURE

**FLO International**

- Central Services
- Trade Certification
- Producer Certification

**FLO-Cert GmbH**

- Central Services
- Trade Certification
- Producer Certification

**FLO e.V.**

- Central Services
- Producer Business
- Standards Unit

---

### National Initiatives

<table>
<thead>
<tr>
<th>News</th>
<th>Fairtrade Labelling</th>
<th>FLO International</th>
<th>FLO-Cert</th>
<th>Producer Cert</th>
</tr>
</thead>
</table>

---

### FAIRTRADE STANDARDS

- DEFINED
- CATEGORIES

---

**Defining Fairtrade Standards**

**Social Standards**

- Small farmers / Hired labour
- Generic / Product specific
- Minimum requirements / Progress requirements

**Economic / Trade Standards**

- Generic (not for trade yet) / Product specific
- Minimum Price and FT-Premium
- Pre-financing
- Medium/long term commitment
Environmental Standards

- Generic / Product specific

**FLO has different standards for three different Fairtrade situations**

- Standards for small farmer organisations, who cultivate their land (Smallholder Standards)
- Standards for companies, which are dependent on hired workers (Hired Labour Standards)
- Standards for small and unorganised cotton or rice farmers, who cultivate their land or have some hired workers (Contract Production Standards)

**Defining Fairtrade Standards**

- Product specific standards:
  - Bananas (HL), Cocoa, Coffee, Dried Fruit, Fresh Fruit (HL), Honey, Juices, Nuts and oil seeds, Quinoa, Rice, Herbs and spices, Sugar, Tea (HL), Wine (HL)
  - Cotton, Flowers (HL), Sportsballs (HL)

**Certification Process**

**FAIRTRADE CERTIFIED HONEY**

- PARTNERS IN HONEY TRADE
- FAIRTRADE HONEY PRICE
- ORIGIN OF FT HONEY
- TRENDS
Partners in Honey trade

- 26 Certified producer organisations: 13 in Mexico, 4 in Chile, 5 in Guatemala, 2 in Nicaragua, 1 in Argentina, 1 in Zambia
- 3 Registered exporters (1 in Chile and 1 in Mexico, 1 Nicaragua)
- 29 Registered Traders: in the UK (6), Germany (6), Switzerland (4), France (4), Italy (4), Belgium (3), the Netherlands (1) and Japan (1).

FT Honey Price

- New FLO price since **December 2005**
- 1,800 USD/ Mt min. price for **A quality**
- 1,650 USD/ Mt min. price for **B quality**
- 150 USD/ Mt Fairtrade **premium**
- 150 USD/ Mt for **organic** certified honey

When Market Price > Fairtrade Min Price
FLO Min price = Market price + Fairtrade premium

FLO Honey import origins, 2003

![Pie chart showing import origins of honey as of 2003](image)

- **Zambia** 9%
- **Chile** 40%
- **Nicaragua** 9%
- **Mexico** 24%
- **Guatemala** 17%

Trends

- **FT market**: niche and stable
- Since 2002, high price situation
- August 2004, some price stabilisation with Chinese honey back into the market
- Origins most demanded: Mexico, Chile, Guatemala
- Main markets: Switzerland, Germany
- Sales as final product and to the industry.
Challenges

- Competition with domestically produced honey
- High quality standards required by law
- Trade barriers on exports (Africa)- EU list of authorised import countries
- Niche market
- Demand for non-organic Fairtrade honey
- For producer group: Producing enough quantity for export.

Opportunities

- Demand for organic fairtrade honey
- Markets with potential increase: France, Belgium, Italy, Scandinavian Countries
- Potential new markets: catering, cosmetic, industry.

A GROWTH IN FAIRTRADE LABELLED HONEY IN COMING YEARS IS EXPECTED

- FLO producer support network is planning to work on new projects that could help Fairtrade honey producers export the right quality for the European retail market.

More information available

- Email: info@fairtrade.net
- Web: http://www.fairtrade.net/sites/standards/standards.html
- Web: http://www.flo-cert.net
- Email: Certification@flo-cert.net

Contact Pascasie Nyirandege
PBU Liaison Officer for Uganda/Rwanda
FLO International
Bonner Talweg 177
53129 Bonn
Germany
ORGANIC STANDARDS AND GUIDELINES IN ORGANIC APICULTURE
Ulrich Broeker, APICON, Germany

Organic Apiculture – The Quality Alternative
presentation and copyright by APICON

CONTENTS

- organic core issues and terms
- the organic approach
- organic focus and objectives
- organic apiculture basic principles
- marks of quality
- conversion issues
- legal norms and guidelines
- inspection and certification
- EU organic legislation, association standards, forms and questionnaires

See separate documents

- Annex A: Inspection report (draft) for organic apiaries (144kb .pdf file)
- Annex B: Manual for organic certification for small holder groups (draft) (340kb .pdf file)
- Annex C: Sample documents (524kb .pdf file)

KEY TERMS IN ORGANIC PRODUCTION

- quality
- relations
- diversity
- balances
- transparency
- regional differences
- long-term perspectives
- purity / genuineness
- appreciation
- sensitivity
THE ORGANIC APPROACH

Basic reflections – why decide on ‘organic’?

- individual conviction, ethic understanding
- result of observations and experiences with conventional and organic products and production systems
- economic incentive

Legislation on organic apiculture

Definition of ‘organic’ by national legal frameworks including obligatory guidelines (e.g. EU 2092/91 since 1991) for

- production
- producers
- processing
- ex-/importers
- distributors
- use of designation ‘organic’
- certification

LEGAL ORGANIC NORMS AND GUIDELINES

EUROPEAN UNION regulation 2092/91, 1804/1999

USA NOP = National Organic Programme

JAPAN JAS = Japanese Agricultural Standard

Switzerland, Israel, Argentina, Czech Republic, Hungary, Australia have set up organic regulations that are considered equivalent to the EU-norms

Private association standards (umbrella: IFOAM)

DEMETER NATURLAND KRAV SOIL ASSOCIATION BIOSUISSE

National decrees on quality parameters, hygiene, residues etc.

Organic focus and objectives

- conservation and protection of biosphere
- maintaining biodiversity
- sustainability in economical, ecological and social relations
- preservation of traditional resources, knowledge and skills
● food safety in quantity and quality
● wholesome nutrition, diversity, food as remedy

Organic apiculture aims at the realization of organic principles

**Principles of organic production in apiculture**

- **Enhancing diversity**
  - wide range of food sources
  - genetic diversity
  - product diversity

- **Harmonic use of environment**
  - organic apiculture is compatible with other production systems (livestock, agrocultivation)

- **Long-term perspectives**

- **Husbandry according to bee's essential needs and well-being**
  - beekeeping practice aims first at bee's vitality and health

- **Careful and considerate handling and treatment**
  - preservation of genuine, original properties and characteristics

- **Preference of internal cycles instead of external inputs**
  - economical incentive, quality control

- **Use of local resources**
  - supporting local economy, avoiding imports

- **Reduction of non-renewable resources / avoiding pollution**
  - environmental care
Apicultural production system

Quality building economical, ecological and social references and relations

Marks of premium quality in apiculture as a result of connected characteristics

Premium quality = sum of premium qualities of available

- natural resources: nectar, pollen, water
- production means and methods
- processing techniques
- product standards
- food safety
- beneficial and lasting effects
- positive environmental impact
- meeting consumer’s interests
- reasonable relation of price and performance

Increasing threats for bees

- Declining habitats
- Mono-cultural farming / GMO
- Use of pesticides
- Pests and diseases
- Breeding: focus is on the demands of people and not bees
GOING ORGANIC - THE DECISION-MAKING PROCESS

- Certainty about the organic potential of the enterprise
  - Evaluation / inventory of capacities considering
    - motivation, professionalism
    - human, natural, structural, financial resources
    - availability of equipment, material, substances
    - identification of risks (cost estimation, calculation)
    - access to vocational training (qualification, exchange of experience)
    - support opportunities (public advisory service, subsidies)
    - market analysis and access

- Choice of a certifying agency: conclusion of an agreement / contracting
- Systematic action: setup of an agenda following the general conditions:
  - inclusion of the whole enterprise with all units
  - in case of gradual conversion: conversion plan and schedule
  - adherence to the guidelines throughout the conversion period
  - documentation of operator profile and history

- Feeding
  - ensure provision with organic honey or sugar
  - remove not allowed substances (e.g. protein sub.)

- Pest / disease treatment
  - stop application and remove chemotherapeutical - medicaments, apply substances in conformity with guidelines (organic acids, essential oils)

- Working methods
  - no clipping of queens' wings
  - not killing bees to increase crop quantity, removal of drones only to control Varroa infestation
  - exchange of queens is allowed
  - no use of chemical repellents
  - no use of synthetic hive protection (varnish)

- Equipment
  - observe hygienic measures
  - use of food-proof material (INOX), wax-coating (organic!) in case of non-availability for extractors, uncapping devices, containers

- Identification
  - setup apiary register
  - fix obvious hive marks to indicate ownership
  - inform control body in case of migration or change of location

- Product
  - 'best practice' in withdrawal of honey combs, food-grade tools
- **Handling**
  - equipment and workrooms (bee-escape, hygiene, humidity!)
  - check quality parameters (water content)
  - storage conditions: dark, cool, dry

- **Documentation**
  - stock inventory / apiary mapping
  - migration
  - feeding, treatment, harvest (purchase receipts)

- **Labelling**
  - understandability of product origin, meeting legal requirements

### GENERAL INSPECTION REQUIREMENTS

- inspector's competence
- producer's co-operation
- preparation for inspection
- appropriate schedule
- understandable documentation and accounts
- access to all enterprise units on demand
- identification of all productive elements and products
- reporting / assessment of compliance
- documentation of deviations, conditions, sanctions, suggestions
- routine or spontaneous sampling for analysis

### Inspection tour of the enterprise

**Visiting**

- office(s)
- apiaries
- processing rooms
- storage rooms
- subcontractor's unit (if applicable)

**Obligatory detailed review of**

- criticized conditions of last year
- implementation of amendments
- changes in the unit description
- subcontracts

**Spot-checking**
locations & surroundings
foraging resources / migration records
colonies
hive material & tools
harvesting equipment
transport and storage conditions
stock of product, fodder,
medicaments and wax, hygiene
maintenance products/tools
balance check with documentation
demarcation to conventional units
application of lot-number system
traceability of product/production chain
sampling (routine or in case of suspect)

THE INSPECTION REPORT

informs about all findings relevant to the relevant organic regulations

As a visit of a few hours cannot cover all aspects thoroughly, the focus of inquiries will differ from inspection to inspection, e.g.:

- documentation, traceability of products, visits of apiaries, check of in - and outgoing material, labelling, separation measures etc.

Where findings are difficult to be documented by ticks a short text about the specific issue can be helpful for the certifying agency, so is a note about the overall impression of the enterprise.

The inspector expresses a recommendation for certification according to his assessments

Conclusive action / reporting

- Identification and documentation of critical points
- Check of compliances – assessment of derogations
- Dealing with non-conformities: fixing measures
- Pronouncing recommendations / stipulations:
  clear description of necessary amendments,
  deadlines for corrective measures
- Immediate measures: in case of serious suspect ban on sales of certain lots in quest until a decision of the certification agency how to proceed
- Sampling for analysis
EU-REGULATION 2092/91, 1804/1999 Annex C: BEEKEEPING AND BEEKEEPING PRODUCTS

1. General principles

1.1. Beekeeping is an important activity that contributes to the protection of the environment and agricultural and forestry production through the pollination action of bees.

1.2. The qualification of beekeeping products as being from organic production is closely bound up both with the characteristics of the hives' treatments and the quality of the environment. This qualification also depends on the conditions for extraction, processing and storage of beekeeping products.

1.3. When an operator runs several beekeeping units in the same area all the units must comply with the requirements of this Regulation. By derogation from this principle, an operator can run units not complying with this Regulation provided that all the requirements of this Regulation are fulfilled with the exception of the provisions laid down in paragraph 4.2 for the siting of the apiaries. In that case, the product cannot be sold with references to organic production methods.

2. Conversion period

2.1. Beekeeping products can be sold with references to the organic production method only when the provisions laid down in this Regulation have been complied with for at least one year. During the conversion period the wax has to be replaced according to the requirements laid down in paragraph 8.3.

3. Origin of the bees

3.1. In the choice of breeds, account must be taken of the capacity of animals to adapt to local conditions, their vitality and their resistance to disease. Preference shall be given to the use of European breeds of Apis mellifera and their local ecotypes.
3.2. Apiaries must be constituted by means of the division of colonies or the acquisition of swarms or hives from units complying with the provisions laid down in this Regulation.

3.3. By way of a first derogation, subject to the prior approval by the inspection authority or body, apiaries existing in the production unit not complying with the rules of this Regulation can be converted.

By way of a second derogation, the reconstitution of the apiaries shall be authorised by the control authority or body, when apiaries complying with this Regulation are not available, in case of high mortality of animals caused by health or catastrophic circumstances, subject to the conversion period.

3.6. By way of a fourth derogation, for the renovation of the apiaries 10% per year of the queen bees and swarms not complying with this Regulation can be incorporated into the organic-production unit provided that the queen bees and swarms are placed in hives with combs or comb foundations coming from organic-production units. In the case, the conversion period does not apply.

4. Siting of the apiaries

4.1. The Member States may designate regions or areas where beekeeping complying with this Regulation is not practicable. Where no such areas are identified, the beekeeper must provide the inspection authority or body with appropriate documentation and evidence, including suitable analyses if necessary, that the areas accessible to his colonies meet the conditions required in this Regulation.

4.2. The siting of the apiaries must:

(a) ensure enough natural nectar, honeydew and pollen sources for bees and access to water;

(b) be such that, within a radius of 3 km from the apiary site, nectar and pollen sources consist essentially of organically produced crops and/or spontaneous vegetation, according to the requirements of Article 6 and Annex I of this Regulation, and crops not subject to the provisions of this Regulation but treated with low environmental impact methods such as, for example, those described in programs developed under Regulation (EEC) No 2078/92 (1) which cannot significantly affect the qualification of beekeeping production as being organic;

6.2. If despite all the above preventive measures, the colonies become sick or infested, they must be treated immediately and, if necessary, the colonies can be placed in isolation apiaries.

6.3. The use of veterinary medicinal products in beekeeping which complies with this Regulation shall respect the following principles:

(a) they can be used in so far as the corresponding use is authorised in the Member State in accordance with the relevant Community provisions or national provisions in conformity with Community law;

(b) phytotherapeutic and homeopathic products shall be used in preference to allopathic products chemically synthesised, provided that their therapeutic effect is effective for the condition for which the treatment is intended;

(c) if the use of the abovementioned products should prove or is unlikely to be effective to eradicate a disease or infestation which risks destroying colonies, allopathic chemically synthesised
medicinal products may be used under the responsibility of a veterinarian, or other persons authorised by the Member State, without prejudice to the principles laid down in paragraphs (a) and (b) above;

(d) the use of allopathic chemically synthesised medicinal products for preventive treatments is prohibited;

(e) without prejudice to the principle in (a) above formic acid, lactic acid, acetic acid and oxalic acid and the following substances: menthol, thymol, eucalyptol or camphor can be used in cases of infestation with Varroa jacobsoni.

6.4. In addition to the above principles, veterinary treatments or treatments to hives, combs etc., which are compulsory under national or Community legislation shall be authorised.

6.5. If a treatment is applied with chemically synthesised allopathic products, during such a period, the colonies treated must be placed in isolation apiaries and all the wax must be replaced with wax complying with the conditions laid down in this Regulation. Subsequently, the conversion period of one year will apply to those colonies.

6.6. The requirements laid down in the previous paragraph do not apply to products mentioned in paragraph 6.3(e).

6.7. Whenever veterinary medicinal products are to be used, the type of product (including the indication of the active pharmacological substance) together with details of the diagnosis, the posology, the method of administration, the duration of the treatment and the legal withdrawal period must be recorded clearly and declared to the inspection body or authority before the products are marketed as organically produced.

7. Husbandry management practices and identification

7.1. The destruction of bees in the combs as a method associated with the harvesting of beekeeping products is prohibited.

7.2. Mutilation such as clipping the wings of queen bees is prohibited.

7.3. The replacement of the queen bees involving the killing of the old queen is permitted.

7.4. The practice of destroying the male brood is permitted only to control the infestation with Varroa jacobsoni.

7.5. The use of chemical synthetic repellents is prohibited during honey extractions operations.

7.6. The zone where the apiary is situated must be registered together with the identification of the hives. The inspection body or authority must be informed of the moving of apiaries with a deadline agreed on with the inspection authority or body.

7.7. Particular care shall be taken to ensure adequate extraction, processing and storage of beekeeping products. All the measures to comply with these requirements shall be recorded.

7.8. The removals of the supers and the honey extraction operations must be entered in the register of the apiary.
8. Characteristics of hives and materials used in beekeeping

8.1. The hives must be made basically of natural materials presenting no risk of contamination to the environment or the apiculture products.

8.2. With the exception of products mentioned in paragraph 6.3(e) in the hives can be used only natural products such as propolis, wax and plant oils.

8.3. The beeswax for new foundations must come from organic production units. By way of derogation, in particular in the case of new installations or during the conversion period, beeswax not coming from such units may be authorised by the inspection authority or body in exceptional circumstances where organically produced beeswax is not available on the market and provided that it comes from the cap.

8.4. The use of combs, which contain broods, is prohibited for honey extraction.

8.5. For the purposes of protecting materials (frames, hives and combs), in particular from pests, only appropriate products listed in part B, Section 2, of Annex II are permitted.

8.6. Physical treatments such as stream or direct flame are permitted.

ANNEX II, part B

Microorganisms used for biological pest control

Microorganisms (bacteria, viruses and fungi) e.g. *Bacillus thuringensis*, *Granulosis virus*, etc.


ANNEX II, part E

PRODUCTS AUTHORISED FOR CLEANING AND DISINFECTION OF LIVESTOCK BUILDINGS AND INSTALLATIONS (E.G. EQUIPMENT AND UTENSILS)

Potassium and sodium soap

Water and steam

Milk of lime

Lime

Sodium hypochlorite

Alcohol

Caustic soda

Caustic potash

Hydrogen peroxide

Caustic soda

Natural essences of plants

Citric, peracetic acid, formic, lactic, oxalic and acetic acid
PRIVATE STANDARDS IN ORGANIC APICULTURE
- obligatory for contract partners using brand labels

Guidelines beyond EU-norms with reference to different specific issues:

- Spreading biodynamic preparations in apiaries during winter
- Queen rearing based on swarm drive; grafting and artificial insemination not allowed
- Wax quality meeting DEMETER standards only
- Comb foundation (midribs) in supers only
- No feeding to stimulate breeding (pollen substitutes)
- Cleaning of hives with water and heat only
- Bottling of honey before crystallisation, no micro-filtration
- Maximum conversion period: 3 years
- Product parameters beyond EU standards (e.g. water content)
- Further minor rules
- No migration to conventional nectar sources
- Cleaning hives with caustic soda only in case of safe disposal
- Constant renewal of wax stocks
- Wax analysis before certification
- Removal of fodder before nectar flow
- No pollen substitutes
- Pollen traps harmless to bees
- Waiting period for Varroa-treatment with essential oils minimum: 3 months
- Returnable containers for retail trade
- Commitment to water content, HMF-level, enzyme activity of honey

Correct labelling of organic honey

<table>
<thead>
<tr>
<th>Producer (Name/Code)</th>
<th>Franz Maller 11.5.03</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collecting point</td>
<td>Co-opBeta</td>
</tr>
<tr>
<td>Client</td>
<td>Meier, Cestadt</td>
</tr>
<tr>
<td>Harvest year</td>
<td>2005</td>
</tr>
<tr>
<td>Honey type</td>
<td>Polyflora</td>
</tr>
<tr>
<td>Net weight</td>
<td>297 kg</td>
</tr>
<tr>
<td>Certified by</td>
<td>Biocert 006</td>
</tr>
<tr>
<td>Container/drum no.</td>
<td>2 / 12</td>
</tr>
<tr>
<td>Lot-No.</td>
<td>FMA 05 2</td>
</tr>
</tbody>
</table>
Correct labelling of conventional honey

<table>
<thead>
<tr>
<th>Producer (Name/Code)</th>
<th>Franz Maller 11.5.03</th>
</tr>
</thead>
<tbody>
<tr>
<td>In conversion since</td>
<td>XX.XX.XXX</td>
</tr>
<tr>
<td>Collecting point</td>
<td>Co-op Betal</td>
</tr>
<tr>
<td>Client</td>
<td>Meier, Cestadt</td>
</tr>
<tr>
<td>Harvest year</td>
<td>2005</td>
</tr>
<tr>
<td>Honey type</td>
<td>Polyflora</td>
</tr>
<tr>
<td>Net weight</td>
<td>297 kg</td>
</tr>
<tr>
<td>Container/drum no.</td>
<td>2/12</td>
</tr>
<tr>
<td>Lot-No.</td>
<td>FMA 052</td>
</tr>
</tbody>
</table>

DOCUMENTATION ESSENTIALS

There is no obligatory format for documentation. It is helpful however to introduce standard forms for a better understanding and clarity of what has happened since the previous inspection. It also helps the producer to find out differences between single periods, characteristics of bee strains, apiary locations, crop yields, conversion peculiarities etc.

The following forms did prove to be simple enough but comprehensive to meet inspection demands.

Distribution of copies to clients as copies are recommended
### Bee Disease / Pest Treatment

<table>
<thead>
<tr>
<th>Date</th>
<th>No. of colonies</th>
<th>Disease / pest</th>
<th>Medication / drug**</th>
<th>Quantity colony</th>
<th>Application***</th>
<th>Period of treatment</th>
<th>Origin of medication ***</th>
</tr>
</thead>
</table>

* Specify agent / effective substance

** Give details e.g. vaporizer, sprayer, feeding

*** Keep receipts please

### Medicament Account

<table>
<thead>
<tr>
<th>Date</th>
<th>Type</th>
<th>In stock / Ingoing</th>
<th>Outgoing / Balance</th>
</tr>
</thead>
</table>

### Feeding

<table>
<thead>
<tr>
<th>Date</th>
<th>No. of colonies</th>
<th>Quantity</th>
<th>Powder type *</th>
<th>Origin **</th>
</tr>
</thead>
</table>

* Please specify e.g. organic sugar, organic honey

** Keep purchase receipts
### Honey Account

<table>
<thead>
<tr>
<th>Date</th>
<th>No. of colonies</th>
<th>Type of honey</th>
<th>Total crop** quantity</th>
<th>Lot-No.</th>
<th>Date</th>
<th>Quantity</th>
<th>Type</th>
<th>Lot No.</th>
<th>Purchase / use***</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* First entry is the inventory before the new harvest
** Give details if honey was purchased (e.g. for feeding purpose)
*** Give details: name of buyer, own use (e.g. feeding), others (e.g. fermentation, theft)

### Beeswax Account

<table>
<thead>
<tr>
<th>Date</th>
<th>Qty. foundation</th>
<th>Qty. crude wax</th>
<th>Origin**</th>
<th>Date</th>
<th>Qty. crude wax</th>
<th>Recipient***</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* Make inventory on a fixed date annually, e.g. 31.12.
** Give details: own, seller, processor
*** Give details: own use, sales, dwindling etc.
Wax analysis

Testing for residues of varroacides:

Amitraz - Apitol
Brompropylate - Coumaphos
Fluvalinate - Dibrombenzophenone

Residues of wax moth control:

Para-dichlorbenzol

Required quantity: 100 g (pure wax), from different lots present in the production cycle (comb foundation, wax blocks or bars ready to process)

Costs:

- app. 50 – 80 € for varroacides standard analysis
- app. 70 € for wax moth repellents

Honey analysis

<table>
<thead>
<tr>
<th>Type of analysis</th>
<th>Test parameters</th>
<th>Approximate cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard honey analysis</td>
<td>water content</td>
<td>50 €</td>
</tr>
<tr>
<td></td>
<td>HMF (parameter for heat or time damage)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>enzyme activity (diastase)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>pH (acidity)</td>
<td></td>
</tr>
</tbody>
</table>
Analysis for residues from beekeeping procedures
- Antibiotics such as streptomycin, sulphonamide, tetracycline and chloramphenicol: 90 €

Analysis for residues from the environment
- Pesticide residues such as chloro-pesticides and phosphoro-pesticides: 100 €

**Sketch for sampling honey and wax for sampling purpose**

e.g. Co-operative of 9 producers in 3 villages

The internal inspector takes two samples from each beekeeper; one for analysis, the other for reference/cross-checking, which remains with the producer or control body. A sample lot comprising several barrels should come from at least 10% of the containers. From each group the samples are homogenized. From the resulting collective lots one sample for analysis and one for reference is taken by the external inspector. Collective lots are again homogenized. One sample is sent to the laboratory, the reference sample remains with the certifying agency.

**Labelling of sampling containers:**

Code-/lot-no., substance, designation of analysis, date of harvest, date and place of sampling, inspector’s name, signature of inspector and producer

**Entry in sampling plan!!**

**Storage of reference samples:** cool, dark, airtight
EPOPA – THE MARKET DEMAND FOR ORGANIC BEE PRODUCTS IN EUROPE AND HOW EPOPA PROMOTES THE EXPORT OF AFRICAN ORGANIC PRODUCTS

Haike Rieks, EPOPA, The Netherlands

EPOPA
Export Promotion of Organic Products from Africa

Implemented by:
- Agro Eco
- Grolink

Funded by:
- Sida

EPOPA

- **Aim:** To improve livelihood of rural communities through organic trade.
- **EPOPA support to exporters/cooperatives:**
  - Management assistance
  - Staff training / Organic agriculture advise
  - Development of ICS
  - Tree and crop seedling nurseries
  - Product quality management and improvement
  - Product development
  - Organic certification procedures and issues
  - Sharing in certification costs
  - Certification to additional standards
  - Seed money for farmers

Marketing organic Products

- Short chain development
- Sufficient volume and consistent quality
- Internal control system
- Organic certification resulting in organic premium
- Business plan
- Marketing plan/strategy
- Market studies and surveys
- Exposure of products and exporter
- Project presentation and brochures
- Participation on organic trade shows

**EU market access**

Honey imports into the EU need to:

- come from a country approved to export honey to the EU
- follow the EU hygiene package laid down in Regulation 853/2004/EC for animal products

**Quality Honey**

- Sensorial testing (aroma, taste, appearance and mouth feel)
- Colour
- Composition analysis (HMF, Moisture, Sugar components)
- Viscosity
- Microscopic analyses of pollen to give a floral origin and its geographic origin
- Residue testing
- Repellents used during harvesting
- Parameters linked to fermentation

**European Honey Consumption**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Austria</td>
<td>1.4</td>
<td>1.5</td>
<td>1.2</td>
<td>1.4</td>
<td>1.8</td>
<td>1.5</td>
<td>1.5</td>
<td>1.7</td>
</tr>
<tr>
<td>Greece</td>
<td>1.6</td>
<td>1.5</td>
<td>1.5</td>
<td>1.6</td>
<td>1.5</td>
<td>1.4</td>
<td>1.4</td>
<td>1.6</td>
</tr>
<tr>
<td>Germany</td>
<td>1.4</td>
<td>1.1</td>
<td>1.0</td>
<td>1.2</td>
<td>1.1</td>
<td>1.1</td>
<td>1.1</td>
<td>1.1</td>
</tr>
<tr>
<td>Spain</td>
<td>0.8</td>
<td>0.7</td>
<td>0.7</td>
<td>0.8</td>
<td>0.9</td>
<td>0.8</td>
<td>0.9</td>
<td>0.7</td>
</tr>
<tr>
<td>Sweden</td>
<td>0.5</td>
<td>0.3</td>
<td>0.4</td>
<td>0.4</td>
<td>0.5</td>
<td>0.6</td>
<td>0.7</td>
<td>0.7</td>
</tr>
<tr>
<td>Belgium-Luxembourg</td>
<td>0.4</td>
<td>0.5</td>
<td>0.7</td>
<td>0.7</td>
<td>0.6</td>
<td>0.6</td>
<td>0.6</td>
<td>0.6</td>
</tr>
<tr>
<td>Finland</td>
<td>0.5</td>
<td>0.3</td>
<td>0.5</td>
<td>0.4</td>
<td>0.6</td>
<td>0.5</td>
<td>0.5</td>
<td>0.5</td>
</tr>
<tr>
<td>France</td>
<td>0.4</td>
<td>0.4</td>
<td>0.4</td>
<td>0.5</td>
<td>0.5</td>
<td>0.5</td>
<td>0.5</td>
<td>0.5</td>
</tr>
<tr>
<td>Ireland</td>
<td>0.5</td>
<td>0.5</td>
<td>0.4</td>
<td>0.3</td>
<td>0.3</td>
<td>0.3</td>
<td>0.4</td>
<td>0.5</td>
</tr>
<tr>
<td>Portugal</td>
<td>0.4</td>
<td>0.4</td>
<td>0.4</td>
<td>0.4</td>
<td>0.5</td>
<td>0.5</td>
<td>0.5</td>
<td>0.5</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>0.3</td>
<td>0.4</td>
<td>0.4</td>
<td>0.5</td>
<td>0.4</td>
<td>0.4</td>
<td>0.4</td>
<td>0.5</td>
</tr>
<tr>
<td>Denmark</td>
<td>0.4</td>
<td>0.4</td>
<td>0.3</td>
<td>1.0</td>
<td>0.4</td>
<td>0.6</td>
<td>0.8</td>
<td>0.4</td>
</tr>
<tr>
<td>Italy</td>
<td>0.4</td>
<td>0.4</td>
<td>0.4</td>
<td>0.3</td>
<td>0.3</td>
<td>0.3</td>
<td>0.4</td>
<td>0.4</td>
</tr>
<tr>
<td>Netherlands</td>
<td>0.4</td>
<td>0.4</td>
<td>0.3</td>
<td>0.4</td>
<td>0.4</td>
<td>0.4</td>
<td>0.3</td>
<td>0.3</td>
</tr>
</tbody>
</table>
EU Consumption 2003

<table>
<thead>
<tr>
<th>Country</th>
<th>Consumption*</th>
<th>Country</th>
<th>Consumption*</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU total</td>
<td>265,367</td>
<td>Netherlands</td>
<td>8,231</td>
</tr>
<tr>
<td>Germany</td>
<td>96,052</td>
<td>Belgium-Luxembourg</td>
<td>6,800</td>
</tr>
<tr>
<td>Spain</td>
<td>35,021</td>
<td>Portugal</td>
<td>4,514</td>
</tr>
<tr>
<td>France</td>
<td>27,797</td>
<td>Sweden</td>
<td>6,017</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>27,913</td>
<td>Denmark</td>
<td>2,169</td>
</tr>
<tr>
<td>Italy</td>
<td>18,912</td>
<td>Finland</td>
<td>2,702</td>
</tr>
<tr>
<td>Greece</td>
<td>16,058</td>
<td>Ireland</td>
<td>1,290</td>
</tr>
<tr>
<td>Austria</td>
<td>12,662</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Consumption is calculated as production + imports - exports.

Honey market

- 85% used as table honey
- Preference goes to:
  - Light coloured honey
  - Liquid honey
  - Smooth tasting honey

Honey types

- Creamed honey (Belgium, Luxembourg)
- Light coloured honey plus small demand for dark honey (Denmark)
- Monofloral honey (France)
- Liquid monofloral honey (Germany)
- Lower quality honey (industrial sector)

HONEY

Organic food market share

- Germany: 2.6% of their market share is organic
- UK: 1.2% of their market share is organic
- Netherlands: 1.4% of the market share is organic
- Organic demand is increasing in EU.
- Estimated total market for organic honey in Europe is 6,500 tonnes per year.
EU imported honey

- Value of honey imported in EU (millions euro)

Imports from outside EU

- Volume of imports of honey from outside the EU (thousands of tonnes)

<table>
<thead>
<tr>
<th></th>
<th>1999</th>
<th>2000</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>EU extra</strong></td>
<td>151,339</td>
<td>156,720</td>
<td>158,541</td>
<td>155,443</td>
<td>146,32</td>
</tr>
<tr>
<td><strong>Argentina</strong></td>
<td>45,383</td>
<td>42,576</td>
<td>46,54</td>
<td>56,303</td>
<td>50,416</td>
</tr>
<tr>
<td>Hungary</td>
<td>8,013</td>
<td>11,016</td>
<td>10,394</td>
<td>15,157</td>
<td>14,803</td>
</tr>
<tr>
<td>Mexico</td>
<td>19,098</td>
<td>21,477</td>
<td>17,790</td>
<td>18,528</td>
<td>12,550</td>
</tr>
<tr>
<td>Turkey</td>
<td>3,298</td>
<td>2,976</td>
<td>2,699</td>
<td>9,742</td>
<td>12,478</td>
</tr>
<tr>
<td>Brazil</td>
<td>62</td>
<td>62</td>
<td>568</td>
<td>4,512</td>
<td>9,760</td>
</tr>
<tr>
<td>Romania</td>
<td>7,019</td>
<td>8,881</td>
<td>6,608</td>
<td>5,068</td>
<td>7,788</td>
</tr>
<tr>
<td>Bulgaria</td>
<td>2,515</td>
<td>5,144</td>
<td>2,658</td>
<td>3,508</td>
<td>4,773</td>
</tr>
<tr>
<td>India</td>
<td>1,394</td>
<td>2,262</td>
<td>1,533</td>
<td>3,273</td>
<td>4,722</td>
</tr>
<tr>
<td>Cuba</td>
<td>4,206</td>
<td>5,493</td>
<td>5,846</td>
<td>4,377</td>
<td>4,392</td>
</tr>
<tr>
<td>Uruguay</td>
<td>6,875</td>
<td>4,075</td>
<td>6,687</td>
<td>3,730</td>
<td>3,635</td>
</tr>
<tr>
<td>Chile</td>
<td>2,516</td>
<td>3,012</td>
<td>4,160</td>
<td>4,000</td>
<td>3,402</td>
</tr>
<tr>
<td>China</td>
<td>34,997</td>
<td>33,573</td>
<td>37,054</td>
<td>13,752</td>
<td><strong>1,654</strong></td>
</tr>
<tr>
<td>Australia</td>
<td>3,806</td>
<td>3,387</td>
<td>2,983</td>
<td>1,989</td>
<td>1,596</td>
</tr>
</tbody>
</table>

Germany

- 96,000 tonnes (2003) Largest consumption market for honey, imports 93,500 tonnes
- Variety of honey: light-dark, liquid-solid, botanical and geographic origin
- Organic honey market 2,500 tonne
- Organic brand leader Allos 80%
- Small market for Demeter certification
- 354 tonnes Fair Trade honey sold in 2003
- GEPA leading brand name of Fair Trade honey
United Kingdom

- 27,800 tonnes (2003) consumption imports 21,867 tonnes
- 928 tonnes marketed as organic (2004)
- Industry leader is Rowse
- 102 tonnes Fair Trade honey sold in 2003
- Brand names: Swallows, ASDA, Rowse, Traidcraft, Equal Exchange, Tropical Forest

Fair Trade honey

- 14% of the retail honey is Fair Trade
- Total Fair Trade honey sales in 2004 is 1236 tonnes
- Main countries selling Fair Trade honey (past three years):
  - Germany (decrease, 378 to 335 tonnes)
  - Great Britain (high increase, 100 to 207 tonnes)
  - Switzerland (same, 385 to 396 tonnes)
  - Italy (increase, 38 to 102 tonnes)
  - France (increase, 0 to 52 tonnes)

Prices

Prices various on quality and origins (prices from December 2005)

<table>
<thead>
<tr>
<th>Type/Name</th>
<th>Origin</th>
<th>Prices 2005</th>
<th>Lowest price 2005</th>
<th>Highest price 2005</th>
</tr>
</thead>
<tbody>
<tr>
<td>White</td>
<td>China</td>
<td>1,170</td>
<td>1,120</td>
<td>1,390</td>
</tr>
<tr>
<td>Extra-light amber</td>
<td>China</td>
<td>1,150</td>
<td>1,100</td>
<td>1,370</td>
</tr>
<tr>
<td>Light amber</td>
<td>China</td>
<td>1,130</td>
<td>1,080</td>
<td>1,350</td>
</tr>
<tr>
<td>25 mm*</td>
<td>Argentina</td>
<td>1,620</td>
<td>1,420</td>
<td>1,825</td>
</tr>
<tr>
<td>34 mm*</td>
<td>Argentina</td>
<td>1,590</td>
<td>1,310</td>
<td>1,700</td>
</tr>
<tr>
<td>50 mm*</td>
<td>Argentina</td>
<td>1,570</td>
<td>1,275</td>
<td>1,650</td>
</tr>
<tr>
<td>85 mm*</td>
<td>Argentina</td>
<td>1,550</td>
<td>1,250</td>
<td>1,585</td>
</tr>
<tr>
<td>Yucatan</td>
<td>Mexico</td>
<td>1,870</td>
<td>1,625</td>
<td>1,925</td>
</tr>
<tr>
<td>Orange blossom</td>
<td>Mexico</td>
<td>2,200</td>
<td>1,950</td>
<td>2,200</td>
</tr>
<tr>
<td>Extra-light/amber</td>
<td>Australia</td>
<td>2,165</td>
<td>2,120</td>
<td>2,900</td>
</tr>
</tbody>
</table>
Price fluctuations

![Graph showing price fluctuations over time.](image)

**Organic honey prices**

- Organic honey prices are the world market prices plus 15 to 20% premium.
- Impact on the farmer to be an certified organic producer?

  Price of 1,000 UGX/kg premium 200 UGX

  60 tonne = 12,000,000 UGX = 6,666 US$

**In short**

- Compare local and/or regional market with world market prices
- Sufficient produce the whole year
- Consistent quality
- High quality demands

**Website links**

- http://www.epopa.info
- http://www.agroeco.nl
ORGANIC PRODUCTION AND CERTIFICATION IN UGANDA
Charles Walaga, UgoCert, Uganda

CONTENTS
1. Organic production in Uganda
2. Organisations and institutions
3. UgoCert certification programmes
4. UgoCert requirements for organic certification of Apiculture
5. The certification process

1. Organic production

- 1st Certification in 2004 (Fresh fruits)
- 2nd Certification in 2005 (Cotton)

- Current status:

  Organic smallholder farmers: Approx 38,000
  Organic wild production: Approx. 1,300 collectors
  ‘In conversion status’: 15,824 smallholders

<table>
<thead>
<tr>
<th>Beverages</th>
<th>Fruits and Vegetables</th>
<th>Oils</th>
<th>Fibers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coffee</td>
<td>Pineapples</td>
<td>Sesame</td>
<td>Cotton</td>
</tr>
<tr>
<td>Cocoa</td>
<td>Mangoes</td>
<td>E/oils (Lemon grass)</td>
<td>Bark cloth</td>
</tr>
<tr>
<td>Vanilla</td>
<td>Papaya</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ginger</td>
<td>S/Bananas</td>
<td>Shea butter</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Chilies</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Organic wild freshwater fishery
- Organic wild shea butter
- Honey (in conversion)
- Hibiscus calyxes (in conversion)
- Cardamom (in conversion)
- Black pepper (in conversion)
2. Organisations and institutions

Training, extension and research

- MAAIF
- NOGAMU
- NGOs like LOFP
- Networks (PELUM and SATNET)
- EPOPA/SIDA, Hivos
- UMU
- Makerere University

Certifiers:

- Uganda Organic Certification Ltd (UgoCert)
- IMO
- Ceres
- Soil Association
- Ecocert
- BCS

3. Ugocert certification programmes

Uganda Organic Certification Ltd (UgoCert)

Partners:

- IMO
- Ceres

Our services are available throughout Africa, south of the Sahara

- Uganda Organic Standard (UOS)
- EU Regulation 2092/91
- NOP Regulation
- JAS
- Bio Suisse
- Naturland
- KRAV
- Soil Association
4. UgoCert requirements for organic certification of Apiculture

Description of location of the hives

- Nectar and pollen sources of essentially organically grown crops or natural vegetation
- Not near GMO flowering plants
- Good distance (3 – 4 km) away from major sources of contamination (urban centres, waste dumps, industrial areas, water works)
- No feeding on conventionally grown nectar and pollen producing crops
- Any treatment of the hives must be with organically approved materials
- Bees wax for new foundations must be organic. At harvest, hives must be left with reserves of honey and pollen for them to survive.
- Artificial feeding only allowed where the survival of the hives is endangered
- Origin of bees and reproduction must be organic or one year conversion period for EU requirements. From then onwards only apiaries own organic colonies are allowed with 10% non-organic queens or wild swarms
- Use of synthetic repellents during harvesting is prohibited
- Use of synthetics in management of storage pests is prohibited
- Destruction of bees in combs as a method associated with harvesting is not permitted
- There must be no commingling with other honey qualities during harvesting, storage and processing
- Finally the whole production process must be described, labelled and monitored for compliance

Certification costs

- Application/Registration fee (0.5 USD per beekeeper – 150 USD for a project)
- Inspection costs
  - Inspection fees (100 – 250 USD)
  - Transport by public means (depends on distance)
  - Subsistence (modest accommodation and meals)
- Administrative fees (150 – 250 USD)
- Certification fees (250 – 1,000 USD)

5. The certification process

- Contact us for a discussion and the application pack
- Study the information, fill in the application forms
- Submit the application forms with the application fee
- We will review and send you a proposal with a provisional quotation
- Once you pay the quoted amount or an agreed percentage, 1st inspection of the production will be organised and conducted
- The results of the inspection will be assessed, an inspection programme suitable for the production will be developed and an invoice made
- If the certification programme is agreed, then a certification contract is signed
- An agreed % of the invoice has to be paid
- For organic apiculture, a second inspection in the second year of the production (1 year of conversion) could get the project certified
- Organic certification is renewed every year

**The UgoCert Organic Quality Mark**

Uganda Organic Certification Ltd
ACORD Building, Ggaba Road
P.O. Box 33743, Kampala. Uganda.
Tel: +256-041-269 416
Fax: +256-041-2979162
info@ugocert.org
ccwalaga@ugocert.org

*Contact Charles Walaga*
*Uganda Organic Certification Ltd*
*Email: ccwalaga@ugocert.org*
CLUSTER DEVELOPMENT FOR MARKETING BEE PRODUCTS
Elizabeth Ssemwanga, Ssemwanga Research Ltd, Uganda

Who we are

- A private research and consulting company
- Ten years with credible services record in agriculture and food, strategic planning, and enterprise development.
- Collaborate with agribusiness Associations – TUNADO, ACDIVOCA, HORTEXA, UFPEA, UOSPA, Research Institutions, etc.
- Further information visit www.ssemwanga.com

Context

- Need for beekeepers to be organised in viable groups in order to exploit the advantage of economies of scale.
- Increase production of honey
- Commercialize beekeeping
- Diversify beekeeping products
- Develop markets for beekeeping products
- Improve quality and safety for local and international markets
- Are the services reaching the remote farmers to enable them to link into export supply chains? “Even those producing 10 kg want to export”

Cluster Development

An approach where enterprises, concentrated in a given geographic location and engaged in the production and selling of complementary products, combine their strengths and jointly take advantage of business opportunities or solve common problems.

Role and key elements

- **Role**
  To strengthen and enhance the competitiveness of enterprises within a particular sub-sector.

**Key elements**

1. trust building
2. cooperation and/or joint action among the sub-sector actors
3. coordination by full time Cluster Development Agent (CDA)
4. implementation of a strategic Action Plan,
Trust building

Among players AND between players and CDA

- **Entails**
  - Sustained interaction
  - Recognition & communicating of mutual benefits/interests
  - Recognize shared values
  - Identify leaders

- **Benefits**
  - Prepared to share risks
  - Prepared to share information
  - Learn & Innovate together

Types of joint activities

- **Trust building**: Meeting, exposure, general seminar/workshop
- **Pilot activities**: Technical lectures/seminars/workshops, demonstration of new technology
- **Regular (short/medium run) activities**: participation in fairs, raw material purchases, quality improvement training/consultancy, sourcing business development services, skill up-gradation
- **Strategic (long run) initiatives**: Brand building, laboratory creation, information centre, R&D centre, technology modernization, etc.
- **Improvement of linkages**: networks formulation, association/ institution building/ restructuring,

Implementation of a Strategic Action Plan

- A strategic plan of activities, with well-defined time frame and budget derived from in-depth participatory diagnosis of cluster challenges and needs.
- Must have measurable indicators & targets, integrated into and contributing to sector-wide development objectives.
- Takes 3-5 years
- Coordinated by a Cluster Development Agent (CDA)

Cluster Development Agent – qualification

- The catalyst
- Formulates and facilitates implementation of the development strategy, in collaboration with the beekeepers, processors, traders and support institutions active in the sector generally from outside the cluster (not a stakeholder in the cluster)
- A crucial task is to build trust among the cluster stakeholders.
- Must be able to get stakeholders with divergent views to agree on targets and implementation priorities.
Attributes and Skills

- Strong interest in overall development of the cluster, applying best possible methods.
- Age bracket late 20s - late 40s, physically capable of travelling a lot and should possess strong leadership qualities.
- Able to communicate in the local language.
- Stationed in the cluster for the project duration, and may need assistants or advisers.
- Self-starter, Communicator, SME expert, Conflict resolver, Delegator, Negotiator

Cluster Development approach in strengthening Uganda’s Beekeeping Sub-sector

- Viability of Clusters

  - Current beekeepers’ groupings
    - Membership ranges 10 – 500,
    - Geographic coverage ranges from a single village to a district.

- Compare the above type with

  - West Nile cluster (Uganda) with 5,000 – 6,000 farmers from a region
  - NWBP (Zambia) with 6,500 farmers from six districts.

TUNADO Zoning
Cluster Development approach consistency with existing initiatives

- TUNADO’s 2003 -2008 National Strategic Plan

- overall goal to establish a viable and profitable industry that produces high quality honey and other hive products for domestic and export markets through a number of activities.

- The cluster action plan complements TUNADO’s Plan

- BUT it focuses on strengthening grassroots enterprises, allowing TUNADO to concentrate on sector wide/crosscutting activities.

Possible activities under the CDP

Must be based on identified gaps/bottlenecks in the cluster

- Mobilise and train
- Avail information
- Raise production volume
- Improve processing methods
- Improve quality
- R&D, including market research
- Promote value addition to the apiculture products
- Facilitate access to credit

Other Possible activities under the CDP

Competitiveness enhancement

- Promotion of complementary businesses
- Promotion of policy dialogue through a stronger voice from the grassroots enterprises as a joint action
- Coordination and monitoring technical assistance provided by various development organisations at the grass-root level
- Identifying and engaging business development services providers

Project Proposal – by Ssemwanga Research and TUNADO

- Pilot project for the Western Region (can be adopted for other regions)
- Train 15 key actors including prospective cluster development agents in principals of Cluster and Network Development in order to raise general understanding of this program and initial capacity for trust building.
- Conduct an in-depth diagnostic study of beekeeping in the cluster to:

  - Understand the socio-economic environment of the cluster;
  - Identify the most effective leverage points for intervention;
- Provide a baseline for future monitoring and evaluation;
- Build initial trust with and among the stakeholders.

- Building on the findings of the diagnostic study, and working in close cooperation with the cluster stakeholders, develop a vision for each cluster and a strategy to achieve it, as well as the cluster action plan.
- The diagnostic study will be a basis for developing and implementing longer term visions, goals and action plans aimed at improving the competitiveness of the cluster.
- This program can be replicated in different clusters in the country.

**Acronyms**

TUNADO The Uganda National Apiculture Development Organisation.
HOTEXA Horticulture Exporters Association.
UFPEA Uganda Fish Producers and Exporters Association.
UOSPA Uganda Oilseeds Producers Association.
SOS SAHEL – ESTABLISHING PRODUCER CO-OPS IN ETHIOPIA TO COMMERCIALISE HONEY MARKETING
Mulufird Ashagrie, SOS Sahel, Ethiopia

Amhara Bees’ Products Development & Marketing Cooperatives’ Performances

SOS SAHEL ETHIOPIA is a non-governmental, non-profit organization

- Engaged in natural resource management & agricultural development
- It operates in most parts of the country
- Currently it has smallholder market development projects on bees’ products, forest coffee & spices in the Amhara and Southern regions
- This presentation focuses only on the apiculture development & market promotion support in Amhara Region

DESCRIPTION OF THE ONGOING PROJECT

1. Background Information of the Project

- Project title: Smallholder Apiculture Development and *Bees’ Products Trade Promotion Programme*
- Project location: Bahir Dar Zuria, Gondar Zuria, Meket, Dangila,Wereillu, and Gozamin
- Project goal: Contribution to the economic and social development of smallholder farmers in the Amhara Region.
- Purpose: To create market for Bees products through organization of beekeepers into a commercial entity, production of value-added hive products and creating link between local producers and new market outlets.
- Donor Agency: The Royal Netherlands Government
- Implementing Agency: SOS Sahel Ethiopia in collaboration with the regional Cooperative Promotion Bureau
- Project owner: The six Bees’ products development and marketing cooperatives
- Actual start of implementation: July 2003
- Primary targets: smallholder rural beekeeper farmers in the target Woredas

2. Apiculture Development Background of the Region & the Target Six Woredas (Districts)
Natural resources

- The rainfall & vegetation conditions are suitable
- Honeybee population density and productivity are good
- Large areas of lands, unsuitable for cultivation and livestock grazing, are conducive for beekeeping
- 20,000 sq km land or 12% of the total area of the region is wetland
- Oils, pulses, cereal crops and field flowers grown in the region are contributing to the development of Apiculture

Cultural practices

Farmer beekeepers of the region have well developed and long standing traditional

- beekeeping skills
- indigenous knowledge
- intimacy to their colonies

Honey production

- In Amhara region approximately 7000 tonnes of honey are produced annually (2001/02 CSA census report)
- This accounts nearly 25% of the total honey production of the country
- In terms of productivity N. Gonder, W. Gojjam, and Wag Humra are the highest in the region.

Honeybee population & production of the region

<table>
<thead>
<tr>
<th>Zones</th>
<th>Honeybee colonies</th>
<th>Honey production in kg</th>
<th>Productivity yield/colony</th>
</tr>
</thead>
<tbody>
<tr>
<td>North Gonder</td>
<td>163,457</td>
<td>1,392,384</td>
<td>8.5</td>
</tr>
<tr>
<td>South Gonder</td>
<td>127,529</td>
<td>897,025</td>
<td>7.0</td>
</tr>
<tr>
<td>North Wollo</td>
<td>61,736</td>
<td>350,797</td>
<td>5.7</td>
</tr>
<tr>
<td>South Wollo</td>
<td>118,399</td>
<td>696,306</td>
<td>5.9</td>
</tr>
<tr>
<td>North Shewa</td>
<td>67,939</td>
<td>344,678</td>
<td>5.1</td>
</tr>
<tr>
<td>East Gojjam</td>
<td>89,420</td>
<td>644,167</td>
<td>7.2</td>
</tr>
<tr>
<td>West Gojjam</td>
<td>132,716</td>
<td>1,297,704</td>
<td>9.8</td>
</tr>
<tr>
<td>Wag Humra</td>
<td>67,224</td>
<td>659,454</td>
<td>9.8</td>
</tr>
<tr>
<td>Awi</td>
<td>67,768</td>
<td>537,304</td>
<td>8.0</td>
</tr>
<tr>
<td>Oromia</td>
<td>18,787</td>
<td>155,968</td>
<td>8.3</td>
</tr>
</tbody>
</table>
In terms of quality

The moisture content of the honey from this region < 18%,

- Honey from the Region is good for table honey
  - Which attracts honey packers
  - To blend with other honey
- It is also chosen for tej production for its high concentration

Honeybee population and honey production in the target Woredas

<table>
<thead>
<tr>
<th>Woreda</th>
<th>No. of households (HHs)</th>
<th>No. of HH who are beekeepers</th>
<th>% of HH who are beekeepers</th>
<th>No. of colonies</th>
<th>Honey production per year (100 kg)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gonder</td>
<td>52,742</td>
<td>4,235</td>
<td>8.0</td>
<td>14,635</td>
<td>1,612</td>
</tr>
<tr>
<td>Meket</td>
<td>53,143</td>
<td>3,036</td>
<td>5.7</td>
<td>9,108</td>
<td>1,032</td>
</tr>
<tr>
<td>Woreilu</td>
<td>36,108</td>
<td>1,814</td>
<td>5.0</td>
<td>5,543</td>
<td>512</td>
</tr>
<tr>
<td>Gozmen</td>
<td>47,122</td>
<td>5,975</td>
<td>13</td>
<td>7,897</td>
<td>286</td>
</tr>
<tr>
<td>Dangla</td>
<td>28,516</td>
<td>5,648</td>
<td>19.8</td>
<td>23,127</td>
<td>1,745</td>
</tr>
<tr>
<td>Bahrdar</td>
<td>31,973</td>
<td>2,165</td>
<td>6.7</td>
<td>13,134</td>
<td>1,244</td>
</tr>
<tr>
<td>Total</td>
<td>202,482</td>
<td>16,898</td>
<td>9.0</td>
<td>65,547</td>
<td>6,145</td>
</tr>
</tbody>
</table>
Production and management

Traditional beekeeping

In traditional honey production systems, the production expenses are establishment and minimum labour costs

- purchasing of traditional hives (5-10 birr)
- purchasing of honey bee colonies (120 – 200 birr)
- labour for construction of hive stand and shelter
- average honey yield is < 10kg per colony

Intermediate beekeeping

The establishment costs for intermediate technology hives are low

- Can be constructed at home (50-80 birr)
- Honeybee colony (120-200 birr)
- There are difficulties in production of top bars
- The yield is 20kg per colony
Box hive beekeeping

The establishment cost for box hive beekeeping is more expensive (400 birr)

- Requires accessories (further cost)
- Requires skill training
- The yield can be 30 kg per colony

Generally indicates the possibilities of harvesting and supplying
- different types of honey
- at different time
- in different Woredas.

But, requires separate
- collection and
- processing
- labelling
- to meet different market targets.

**Honey harvesting periods**

<table>
<thead>
<tr>
<th>Harvesting period</th>
<th>Gond</th>
<th>Bahr</th>
<th>Dan</th>
<th>Mek.</th>
<th>Wor.</th>
<th>Goza</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oct - Nov</td>
<td>XXX</td>
<td>XXX</td>
<td>XXX</td>
<td>XX</td>
<td>XX</td>
<td>XX</td>
</tr>
<tr>
<td>Nov - Dec</td>
<td>XX</td>
<td>XX</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Apr - May</td>
<td>X</td>
<td>XX</td>
<td>XXX</td>
<td>XX</td>
<td>XX</td>
<td></td>
</tr>
<tr>
<td>Aug - Sep</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>XX</td>
<td></td>
</tr>
</tbody>
</table>

**Summary of Key Actors in the apiculture sub-sector**

- beekeepers
- local honey collectors
- medium merchants
- cooperatives
- tej houses
- big honey verandah
- honey processors
- beeswax processors
- retailers
- input suppliers and
- exporters
Summary of actors and functions in the apiculture sub-sector

<table>
<thead>
<tr>
<th>Value chain</th>
<th>Actor</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Input supply</td>
<td>Fellow farmers</td>
<td>Provide swarm, hives &amp; feeds</td>
</tr>
<tr>
<td>Production</td>
<td>Small scale farmers</td>
<td>Tending, sheltering, feed provision &amp; forage planting</td>
</tr>
<tr>
<td>Harvesting &amp; handling</td>
<td>Small scale farmers</td>
<td>Honey harvesting, storing &amp; transporting. Maintaining quality</td>
</tr>
<tr>
<td>Honey collection at farm</td>
<td>Farmer, merchants, cooperatives and processors</td>
<td>Collect honey from farmers at farm or village</td>
</tr>
<tr>
<td>Honey collection at Woreda/main markets</td>
<td>Honey verandas Woreda merchant</td>
<td>Honey collection, storage, preliminary processing</td>
</tr>
<tr>
<td>Processing and Export/domestic marketing</td>
<td>Processing unit at Addis Ababa</td>
<td>Collect, temporary storage, grading and supply to local &amp; external retailers</td>
</tr>
</tbody>
</table>

Principal marketing channels

In honey and beeswax value chain 4 major channels are observed:

- tej production channel
- Honey processors and exporters channel
- Beeswax processors and exporter channel
- Household consumers' channel

High export potential

For many reasons the country and the region have great potential to export both honey and beeswax

- large volume of honey
- special uni-floral honeys
- different honey harvesting periods
- possibilities of production of organic honey
- being neighbour to high honey consumer Arab countries

3. Project outputs

- Creation of farmers-beekeepers cooperatives and/or a union
- Creation of six collection and processing centres and provision of credit
- Creation of market opportunities for honey and related products
- Establishment of an apiculture resource centre for the region

Provision of technical knowledge to small holder farmers (concerning sustainable honey and beeswax harvesting, processing and marketing)

4. Strategies and approaches
- Enhancement of farmers’ entrepreneurship skill (producing-processing-marketing)
- Creating local and overseas market links (niche markets)
- Private-public partnership promotion
- Application of value-chain approaches
- Enhancing bargaining powers
- Involving all the stakeholders (public, private, CBOs)

5. **Project performances**

Six primary and one secondary cooperatives established and well-functioning:

**Processes**

- Cross visits to similar coops in other Regions
- Familiarization visits and awareness creation
- Workshop was conducted at Bahir Dar to share knowledge and experiences among participants on the importance and challenges of cooperative societies
- Training for organizers (extension workers)
- Preliminary socio-economic survey was conducted.
- Training was organized for beekeepers.
- Organizing committees established
- Model bye-laws were produced and general assembly meetings were organized

**The established cooperatives by Woreda**

<table>
<thead>
<tr>
<th>No</th>
<th>Woreda</th>
<th>Name of co-op</th>
<th>No. of members to date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Gondar zuria</td>
<td>Biruh tesfa</td>
<td>180</td>
</tr>
<tr>
<td>2</td>
<td>Bahir Dar zuria</td>
<td>Yetanazuria abebe</td>
<td>422</td>
</tr>
<tr>
<td>3</td>
<td>Danigla</td>
<td>Agunta</td>
<td>384</td>
</tr>
<tr>
<td>4</td>
<td>Meket</td>
<td>Marotie</td>
<td>511</td>
</tr>
<tr>
<td>5</td>
<td>Gozamin</td>
<td>Tsedey</td>
<td>128</td>
</tr>
<tr>
<td>6</td>
<td>Woreillu</td>
<td>Adey Ababa</td>
<td>312</td>
</tr>
<tr>
<td></td>
<td><strong>Total</strong></td>
<td></td>
<td><strong>1937</strong></td>
</tr>
</tbody>
</table>
## Member cooperatives of the established union

<table>
<thead>
<tr>
<th>No</th>
<th>Zone</th>
<th>Woreda</th>
<th>Co-op Name</th>
<th>Male</th>
<th>Female</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>North Gondar</td>
<td>Gondar Zuria</td>
<td>Biruh Tesfa</td>
<td>174</td>
<td>6</td>
<td>180</td>
</tr>
<tr>
<td>2</td>
<td>South Gondar</td>
<td>Libokemkem</td>
<td>Addis Alem</td>
<td>131</td>
<td>3</td>
<td>134</td>
</tr>
<tr>
<td>3</td>
<td>West Gojjam</td>
<td>Bahir Dar Zuria</td>
<td>Yetan Zuria Abeba</td>
<td>421</td>
<td>1</td>
<td>422</td>
</tr>
<tr>
<td>4</td>
<td>Awi</td>
<td>Dangila</td>
<td>Agunta</td>
<td>383</td>
<td>1</td>
<td>384</td>
</tr>
<tr>
<td>5</td>
<td>Awi</td>
<td>Guangua</td>
<td>Andinet</td>
<td>136</td>
<td>-</td>
<td>136</td>
</tr>
<tr>
<td>6</td>
<td>East Gojjam</td>
<td>Gozamin</td>
<td>Tsedey</td>
<td>128</td>
<td>-</td>
<td>128</td>
</tr>
<tr>
<td>7</td>
<td>North Wello</td>
<td>Meket</td>
<td>Marotie</td>
<td>504</td>
<td>7</td>
<td>511</td>
</tr>
<tr>
<td>8</td>
<td>South Wello</td>
<td>Debre-sina</td>
<td>Limmesk</td>
<td>204</td>
<td>9</td>
<td>213</td>
</tr>
<tr>
<td></td>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td><strong>2081</strong></td>
<td><strong>27</strong></td>
<td><strong>2108</strong></td>
</tr>
</tbody>
</table>

## Establishment of Collection and Processing Centres

- Its main function is product diversification, value addition, packaging and functioning as a means of collecting honey and beeswax from beekeepers, organising certification, and arranging its onward sale.
- Before the finalization of the construction of the CPCs the project availed temporary CPCs.
- The temporary CPCs were equipped with necessary equipment, facilities and personnel and honey processing has been undertaken in all coops successfully in these temporary centres.
- The bookkeeping systems of the temporary collection and processing centres have been established and used to provide on job training on product processing, packaging, labelling and delivering.
- The construction of four permanent CPCs has been completed and the remaining two will be finalized soon
- Access to credit enhanced
One of the four newly built CPCs

Improved Containers
Creation of Market Opportunities

- New market links have been created and potential markets are being explored
- Different market assessments were undertaken
- Different promotional mixes were employed (TV, exhibitions, personal selling, networking, etc.)
- Farmers skills and capacities were enhanced to actively involve in the sales activities.
- Two distributing agents are established for Addis Ababa and its surroundings.
- Retail sales outlets established in Dessie, Gondar and Bahir Dar but currently they are replaced by container shops managed by the coops themselves.
- Label and trademark is developed and well promoted
- Contract is signed between the cooperatives and three exporters (Alrejawi Business Group, ODCOM PLC & Asnake Exporter)
- They are organic certified
Capacity building

- Training in marketing, cooperative management, beekeeping techniques and bookkeeping were organised at all Woredas.
- Regular on-the-job trainings are given to the coops on marketing techniques, labelling and packaging, cost-effectiveness, quality control and processing, and in basic principles and systems of cooperatives such as management, accounting.
- Extension workers were trained in all above mentioned topics.
6. Impacts of the project

Attitudinal change towards:

- Honey cropping
- Business enterprise
- Coop principles, values and collective benefits

Economic Benefits:

- Members have attained good income from price improvement.
- Average dividend gain per member (35-674 Birr)/Season
- Economies of scale in honey production
- Product diversification
- Improvement in food/livelihood security
- Enhancement of Private Traders/ Century, Beza, etc. contribution to the national economy

Social Benefits:

- Raising bargaining position and competitiveness in the open market
- Creation of human capital through extension and training services
- Creation of viable and self-governing farmers’ organizations
- Employment generation
- Forward and backward economic linkages

Technological benefits:

- Some members have acquired skill and are even able to produce top-bar hives
- Transfer of knowledge and skill of processing, constructing etc,
Wider development impacts:

- Commitment from the regional government to replication the project interventions in other 20 Woredas.
- Some neighbouring Woreda beekeepers have started to organize themselves into marketing cooperatives.

7. Challenges

- As the activity is new, it required high attention to act at each step and deploy a highly pronounced amount of personnel, capital and time.
- It was difficult for the project to export honey to the EU because our country is not on the list of honey exporters, not fair-trade registered and there are other trade protection policies.
- The involvement of the stakeholders in the marketing component of the project is found to be insignificant.
- Fast crystallization of crude honey, was the main drawback to process the honey in an easy and simple way.
- Consumers’ misconception regarding granulated honey. The local consumers mistook crystallized honey as being adulterated.
- During the first year of the project, coops purchased honey at higher prices and this negatively affected the sales performance of the same.
- Difficulty in changing subsistence farmers into entrepreneurs in a short period of time.

8. Lessons learnt

- Honey processing is improved from the practice on the field in addition to establishing a well equipped processing plant.
- In terms of price the local market is better than the overseas and hence the local market should be given due attention in the short run.
- When production gets feed-back from the market, quality gets improved.
- As promotion enhances sales it should be done aggressively and professionally
  The involvement of the private sector in a value chain facilitates the transformation of subsistence farmers to commercial ones.
- A commercial project (especially the agricultural commodity marketing) to be successful demands the involvement and full-hearted commitment of all stakeholders from all walks of walk, and the positive thinking of all staff, within the institution.
- Working with different stakeholders, Govts, NGOs and private sectors help develop strong teamwork spirit and good experiences to deal with different people and institutions smoothly, to achieve the purpose.
- It is possible to adopt and disseminate skills and technologies easily if the right extension approach is followed.
- Farmers’ confidence and negotiation power rises when they become organized in the way that they have their own dependable economic and social institution.
- "Supply can create its own demand", for it has been seen that consumers shift from consuming crude honey to processed one even at higher prices.
- Product diversification improves farmers’ income and entrepreneurship skills.
THE WAY FORWARD

1. Importance to continue

- Scaling up (geography/sector)
- Consolidation
- Diversification

2. Approach

- Competitiveness
- Conformance
- Connecting
- Involving

3. Major interventions

- Farmers’ organization
- Product collection and processing
- Product marketing
- Technology development
- Inclusion of women and youth
- Strengthening the union
- Capacity building
THE ROLE AND REQUIREMENTS OF A NETWORK FOR THE PROMOTION OF THE AFRICAN HONEY TRADE

Bert-Jan Ottens, ProFound, The Netherlands

ProFound Work

- 16 years working experience with NGOs, GOs and International Organisations such as UNCTAD, ITC, IUCN and FAO on linking biodiversity and trade:
  - Market research/analysis (particular CBI)
  - Feasibility studies
  - Programme formulation and evaluation (CBI, NTFP-EP, Biotrade, Phytotrade Africa, Afghanistan)
  - Training in Value Chain Analysis and Market Information Systems
- Working in Asia, Africa and Latin America

Website: www.ThisIsProFound.com

www.cbi.nl
Biodiversity and trade
Elements of Value Chain Analysis and Development in the sustainable utilisation and marketing of Biodiversity Products

SUSTAINABLE SUPPLY CHAIN MANAGEMENT

- Resource assessment
- Conservation
- Value addition and product development:
  - Sustainable use
  - Reviewing resource assessment
  - Re-valuation of resources
- Legislation and Control (government):
  - WHO-guidelines (GACP)
  - Certification (quality, Organic, FSC)
  - Science
- Quality:
  - Product
  - Management (ISO, GMP, HACCP, economic, ecological/social aspects of sustainability)
- Trust – communication:
  - Multi-Stakeholder management
  - Avoid marginalisation
  - Practical
- Business planning as a management tool

MARKET
NOVIB-RALF Multi-Stakeholder Programme in Afghanistan: Natural Ingredients for Food, Cosmetics & Pharmaceuticals RALF 02-07

Value Chain Development of Natural Ingredients for Sustainable Livelihoods in Afghanistan

Bert-Jan Ottens, Executive manager
African Honey Trade Workshop

Resolution August 2005 in Dublin:

- Establish an African Honey Traders Forum to increase honey exports from Africa, piloted in Eastern and Southern Africa
- Principally be of benefit to traders working with beekeepers who are already at organisational and productive capacity to export honey and hive products
- Membership restricted to traders, though Forum will assist other producers and traders in reaching this capacity
- Members assist one another, exchange of technical advice and best practices, and providing local consultants

Aims of the Forum (November 2005):

- Build capacities of African Beekeepers and African honey traders to export honey
- Build a broader market for African Honey in Europe
- Safeguard the needs and interests of African Producers

Resolution and Aims point at African Honey Trade Association or TPO?

Terminology: Forum – Trade Association – Trade Promotion Organisation
ApiTrade Africa

Becoming specific upon decision to go ahead:

- Proper name giving: Forum, Association, TPO: ApiTrade Africa
- Competition vs collaboration: common needs/interests, creating win-win situations (e.g. joint research/investing); harmonising language, standards (incl. African consumer standards), legislation
- Product development and targeting different markets (local, regional, EU, other internat. ?) at different levels diversification: what products are included + further dev’t of specialty products, segmentation; differentiating standards for different markets
- Multi-stakeholder approach needed (practice/producers, science, policy/legislation, B2B linkages), even when members only traders
- Forum based on strong country networks, and based on pro-active collaboration and strategies; strong members are drivers, to take on mentoring role for weaker ones (whether traders or countries) = common interest: strong African voice, image, market development
- Which traders and countries are in at start, and who can join later?
- **Clear rules and criteria** for:
  - Engagement
  - Involvement
  - Termination
- Management of the Trade Network; secretariat vs decentralised; leaders and leadership; taking on board weaker partners
- Ambitions, targets, critical mass; country and (sub)region wise? Timeframe and funding; Strategy paper
- Constitution, constituents and policies
- Conflict and frustration resolution: transparency, sharing
- International collaboration = solving internal national disputes, strengthening national strategies as basis for African strategy
- Long process; start with small eastern and southern African group for concrete, decisive steps: joint (export) trade development policy: improving (cost) efficiency, effectiveness, joint investing (e.g. in laboratory test facilities), trust building vis-à-vis buyers
- Building up trade network, based on:
  - Value Chain Analysis and Development: adding value
  - Quality assurance
  - Accreditation
  - CSR as part of the product chain
  - FLO and Organic as premiums
  - B2B development towards market
  - Branding and labelling?
  - Collaboration!
SNV'S WORK TO PROMOTE MARKET ACCESS TO BOOST INCOMES OF THE POOR, WITH PRACTICAL EXPERIENCES IN THE REGION, REMAINING CHALLENGES AND WORKABLE STRATEGIES TO DEVELOP THE HONEY INDUSTRY IN THE REGION

Tito Arunga, SNV, Kenya

SNV - Netherland Development Organisation

- Improving access to, and delivery of products & services for more equitable wealth distribution.
- Presentation by SNV Market Access, E&SA Region, for the African Honey Trade Workshop Oct 10th – 13th 2006

SNV Netherlands – ‘Our raison d’etre’

- INGO providing advisory services to organizations in developing countries in support of their efforts towards poverty reduction.
- We focus on sustainable use of local resources to promote living standards of communities through demand-driven, tailored capacity development services and intervene through strategic partnerships with local communities, private and public sector institutions, donors and other development agencies at national, regional and international levels.

Our Practice

- Currently, we support 1,300 organizations spread over 26 countries in 4 continents across the world. In the E&SA we are present in Angola, the Democratic Republic of Congo-DRC, Ethiopia, Mozambique, Rwanda, Kenya, Sudan, Uganda, Tanzania, Zambia and Zimbabwe.
- Themes: Market Access, Responsible & Accountable Local Governance, Sustainable & Pro-poor Tourism, Cross-cutters (Gender, Natural Resource Management, PB&CT, HIV/AIDS)

*Our strategies & interventions are designed with universal objectives of development in mind – ‘the MDGs’*
Where we are in honey (E&SA)

A few cases amongst many...

- Commercialising beekeeping - Kenya, Tanzania
- Business Organisations & their Access to Markets - Ethiopia
- National Beekeeping Programme – Rwanda
- North West Beekeepers Association - Zambia

Our Objectives

- Sustainable and equitable production, income and employment for the poor
- Effective, efficient and increased access to and delivery of basic services

"We believe that poverty can be reduced by strengthening private sector initiatives"
Challenges & constraints

Producer incomes are affected by various supply chain deficiencies as follows;

- Quality and quantity of products is inconsistent
- Supply & demand discrepancies (*retailers resorting to imports*)
- Domestic market opportunities are under-utilised
- Linkages between supply chain actors are inadequate (*interventions tend to develop segments of a chain while ignoring other components*)
- High transaction costs discouraging to local processors and buyers
- Roles & responsibilities of stakeholders not clearly defined
- The retail sector needs to be supported (*majority of domestic consumers believe in imported value added honey products*)

Why is the focus on private sector key?

- Poverty can be alleviated through ‘profit’ initiatives
- Private sector remains the main engine of economic growth, generating employment and incomes
- It empowers people with services and consumer products by expanding choices
- Producer organisations should focus on ‘spot on’, quick turnover business partnerships that are consistent
- Private sector drives sustainability of commodity supply chains

Market Access Model

- Ours services are aligned to NDPs, PRSPs and plans of strategic partners

We consider that:

- Many countries are transitioning to emerging market economies from centrally planned ones
- The public sector no longer provides most of the basic services (*e.g. extension services, training*)
- Current economies are heavily influenced by international development programmes which create opportunities but often ‘distort’ market economies
- Strengthening ‘weak links’ in value chains (*a value chain is only as strong as the weakest link*)
- Service providers must be considered (logistics, finance etc)

‘If we assist a retailer, distributor, processor, capacity builder or producer association improve their operations, benefits can reach primary producers’

- Work with private businesses and ‘business minded’ associations that have the greatest potential to improve supply chains and benefit the largest number of people
- We design client activities to identify barriers to entry and assist them to participate effectively in market

‘No amount of assistance to primary producers will produce tangible results in reducing poverty if intermediaries are weak’

What we see in this initiative

- The success of this sector if consolidated can make honey competitive alongside other sectors.
- If the target of the forum is to impact on lives of producers then membership should take into consideration the strength of it’s trader representation
- Regional initiatives backed by local solutions should be the starting point

‘Build on what is successful and not replicate failure’

- Consumption patterns w.r.t supply and demand in the region for products be identified and strengthened
- Influence on Governments and regional trade agreements to support the sector

Ends/...