The Honey Industry in COMESA: Opportunities and Challenges

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Outline of Presentation

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2. Overview of Honey Production and Trade Worldwide and in Africa
3. Honey production and trade in COMESA
4. Opportunities in COMESA for honey industry development
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Introduction

- 19 MS
- Population: 470.26 Million
- Area: 12 Million Sq Kms

Introduction

COMESA

1. Was established by treaty in 1994
2. With the goal of being a fully integrated, internationally competitive REC with high standards of living
3. Ready to merge into an African Economic Community
4. By 2025, COMESA plans to be a single trade and investment area

Introduction

1. Honey production is an age old practice owing to the various ecological and climatic conditions
2. Beekeeping is a well-accepted farming technology and is best suited to extensive range of ecosystems of the region.
3. Honey is the major apicultural product in Southern and Eastern African countries
4. The beekeeping industry is coming out of shadow attracting public and private sector support and is becoming one of the areas where investments can be encouraged.

Introduction

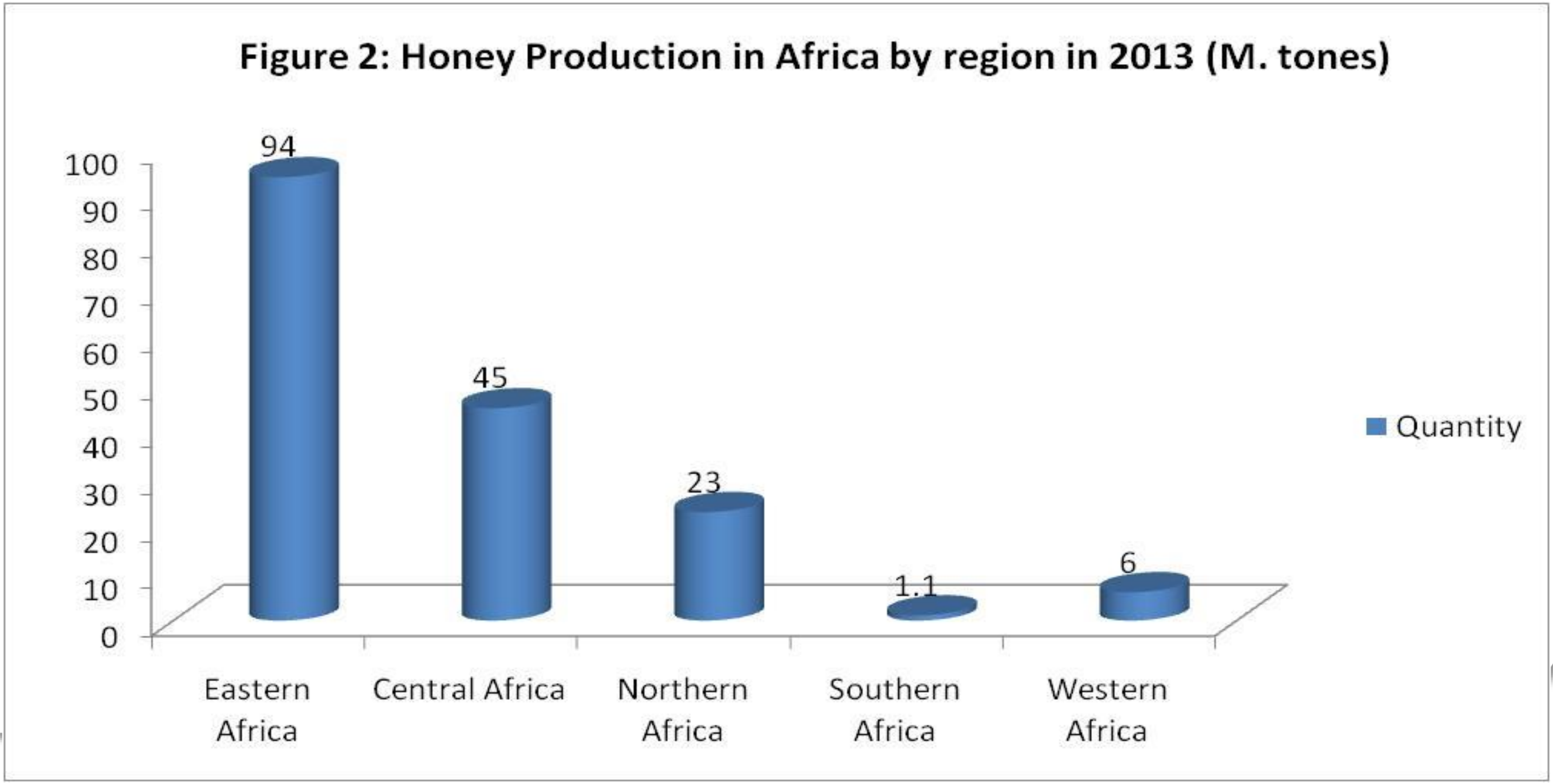
1. There has been lack of information on the sub-sector which poses a challenge in demonstrating the true potential of the industry

2. The specific objectives are:

   - To establish the baseline information on production and trade of the honey and bees wax
   - To identify key challenges facing the sector and how they could be addressed
   - To determine the suitability of the enabling environment of the sector

Total natural honey production in Africa in 2013

Was 169,306.00 tones



Total natural honey production in Africa in 2013

The leading producers were:

1. Ethiopia 45,000.00;
2. Tanzania 30,000.00;
3. Angola 23,300.00 and
4. Central African Republic 16,200.00 tones

Natural honey production and trade in Africa

In terms of trade:

- Only about 1.55 % of Africa’s honey production enters international trade
- In 2012, the leading export countries were:

1. Egypt, 959 t
2. Ethiopia 729 t
3. Zambia 441 t

Honey production and trade in COMESA

1. The total natural honey production in COMESA in 2013 was 81,454 tones. In terms of region over 80% of honey production is in the Eastern African MS

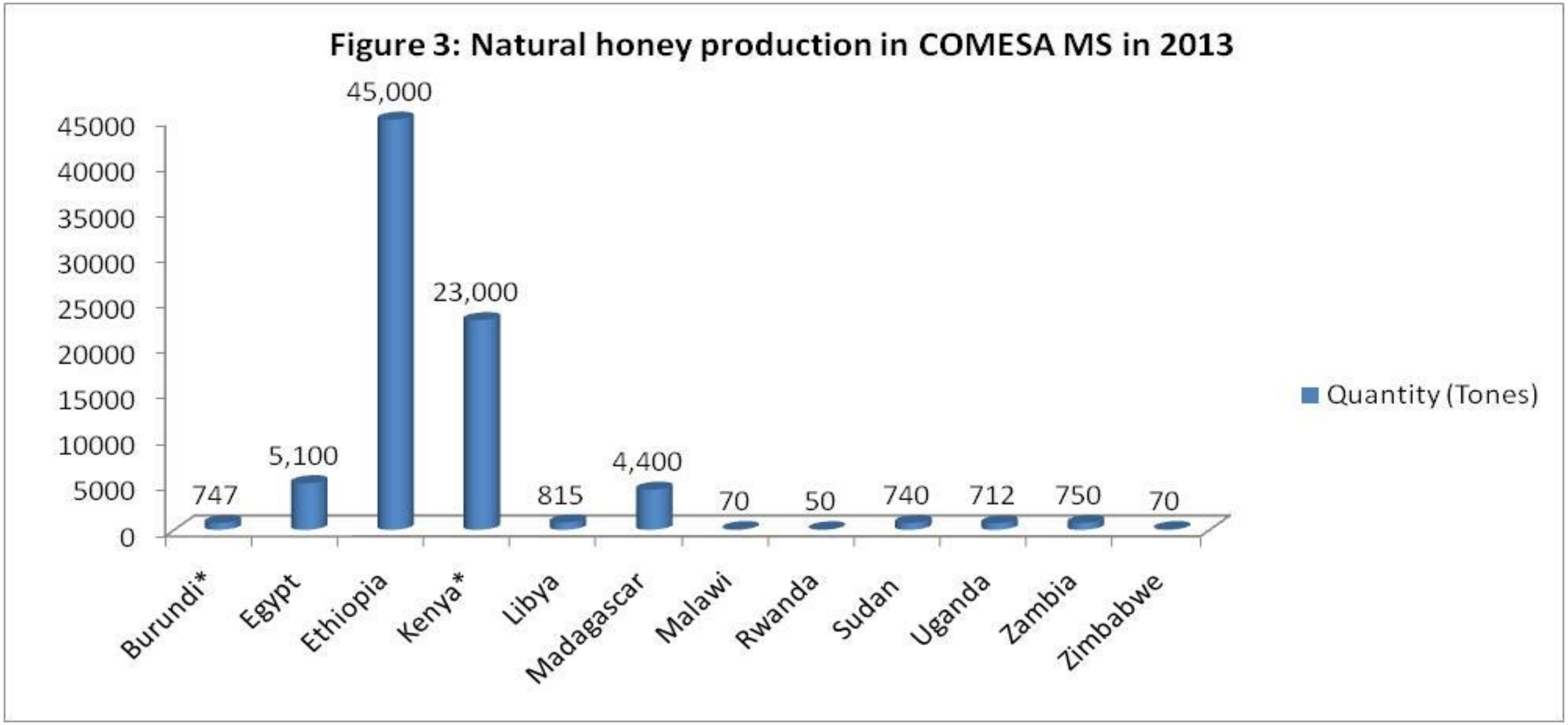


Table 1: Natural Honey Export from COMESA
Note: * Official Data, ** FAO Estimate, *** Provisional official data

Honey production and trade in COMESA

In terms of trade: Only about 2.74 % of COMESA honey production enters international trade.

Country	Quantity (tones)	Value (1000 USD)
Egypt-**	959	3615
Kenya ***	70	209
Madagascar *	20	50
Malawi **	10	55
Mauritius *	1	5
Rwanda *	1	5
Swaziland **	1	5
Uganda *	2	8
Ethiopia *	729	2718
Zambia *	441	1298
Total	**2234**	**7,968**

Note: * Official Data, ** FAO Estimate, *** Provisional official data

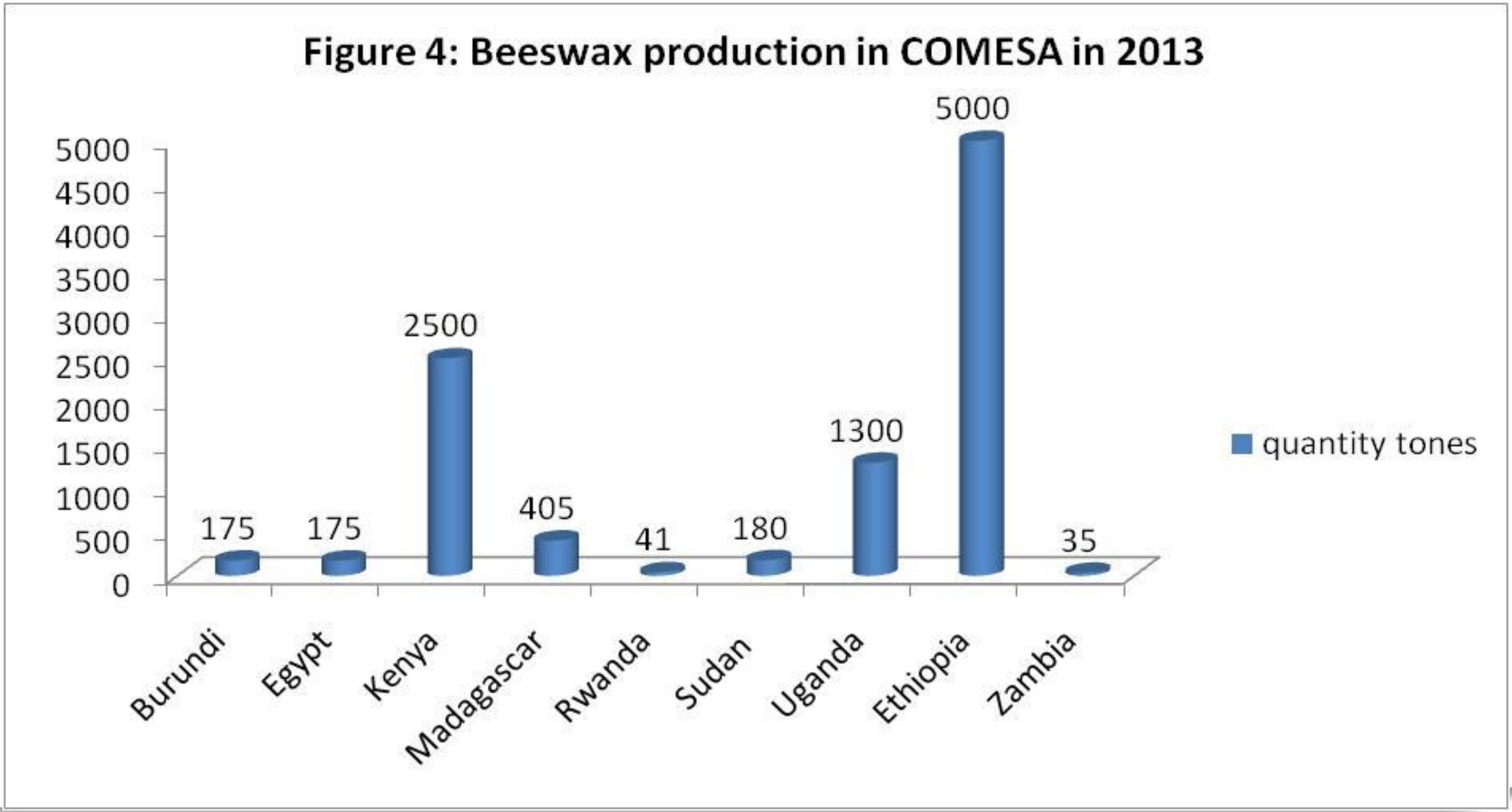
Honey Production and trade in COMESA

Globally, the honey market is well established

1. Highly competitive
2. Significantly influenced by quality standards requirements
3. International trade is tied to the production of **good quality organic honey**.
4. There are also opportunities for **specialized flavor**
5. To compete in this market, exporters need to offer **consistent supplies of large volumes**

Bees wax production and trade in COMESA

The total beeswax production in COMESA member states amounts to **9,811** tones in 2013



Bees wax production and trade in COMESA

In terms of trade:

1. Ethiopia’s export was 365 t
2. Egypt 51 t
3. Madagascar 17 t.

- Generally, there is little emphasis on the production of beeswax in the region,
- The domestic market for beeswax remains underdeveloped.

Opportunities in COMESA for honey industry development

1. **Diverse Agro-Ecological conditions**
   - The prevailing diverse agro-ecological conditions in COMESA region are very conducive for industrial honey production. From cool temperate type environment to tropical ecosystem

2. **Extensive agricultural practices**
   - Crop agriculture is extensively exercised in the region which can be used by forager bee to collect nectar and pollen grain to produce honey.

3. **The presence of international, regional and national organizations**
   - **AU-IBAR, ICIPE, FAO, OIE, ILRI, RECs, ASERECA, CCARDESA, GO and NGO**

Opportunities in COMESA for honey industry development

4. **The presence of supporting institutions in COMESA**

    - African Trade Insurance (ATI) is Africa's export credit agency. They provide political risk and trade credit risk insurance with the objective of reducing the business risk and cost of doing business in Africa.
    - ACTESA
    - COMESA Business Council (CBC) provide business support services and linkages, policy advocacy addressing the pertinent constraints to business and competitiveness in the region, influencing the policy formulation agenda on behalf of the private sector

5. **The developing Cosmetics and Pharmaceutical Industries in the region**

Challenges Facing the Honey Industry in the region

1. **Limited technical capacity**

- limited technical knowhow including lack of material and ability to prepare improved bee hives, poor hive management skills, limited knowhow to colonize hives, weak capacity to examine the beehives and find solution to problems

2. **Lack of enabling regulatory and policy framework**

- A fundamental challenge for the honey industry is lack of an enabling policy framework, strategy and regulatory regime to provide the needed directions and guidelines

Challenges Facing the Honey Industry in the region

3. Access to financial services

- Poor access to finance has been a major bottleneck for the development of industrial level production and to establish honey processing and packaging plants.

4. Lack of standardization and quality management system

- Contributing to the prevalence of **poor production, processing, packaging and proper labeling**. The lack of standardization and quality management emanates from lack of **proper laboratory and facilities** that can be used for quality assessment.

Challenges Facing the Honey Industry in the region

5. Limitation in business management

- Most beekeepers take beekeeping as a part-time economic activity with minimum labour input. Managing and growing beekeeping as business is one of the major challenges that beekeepers face.
- There is also limited knowledge on the existence of international, regional and national level support structures for business and entrepreneurship development.
- Limited use of IT

Note: The overall impact of the above challenges manifests in **low production, poor yield, limited market access, low incomes** and **under-utilization of beekeeping** for effective **wealth creation.**

Conclusions and Recommendations

Conclusions

- The honey industry has high growth potential;
- The prevailing diverse agro-ecological conditions in COMESA region are very conducive for industrial honey production.
- The presence of international, regional and national organizations that have been playing pivotal role in the development of the sector needs coordinated and harmonized approach

Conclusions and Recommendations

Recommendations

- There is a need to harmonize policy and supportive structure at the regional and national level so as to guide the development of the honey industry.

- Establishing intra-regional honey bee product supply chains are essential, and it requires significant support to sustain supplies, improve trade efficiencies and enhance the quality of products.

THANK YOU

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