



Honey Market Snapshot Survey

February 2024

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INTRODUCTION

The following data was gleaned during a comprehensive sweep of private sector honey collection and processing companies who service both the domestic and export markets and is supplemented with data from the Beekeeping Sector Impact Assessment, conducted in May 2024. The majority of the surveyed companies are members of the programme founded and facilitated Georgian Beekeepers Union, but a number are not and comparisons were made between both groups. It included an in depth look at honey suppliers and the markets into which they are selling again comparing those who are members of the Georgian Beekeepers Union and those who are not. This also included examining the levels of and impact of formalization on type of market access. We also examined the makeup of users of the extremely popular Georgian Bees Facebook page to get a better insight into the impact of social media and the breadth of people engaging in the honey sector.

The Alliances programme has been active in the honey sector since 2014 and has facilitated and mapped great changes. Periodic market surveys are undertaken to inform our understanding of sectoral changes, impact and programming.

METHODOLOGY

The ALCP2 conducted a survey including 39 companies (72% GBU members, 28% non-GBU members). See *Figure 1* below. Out of these 39 legal entities, 23 are Limited Liability Companies (LTDs), 10 Individual Entrepreneurs and 6 cooperatives, with 9 companies exporting (*Figure 1*).

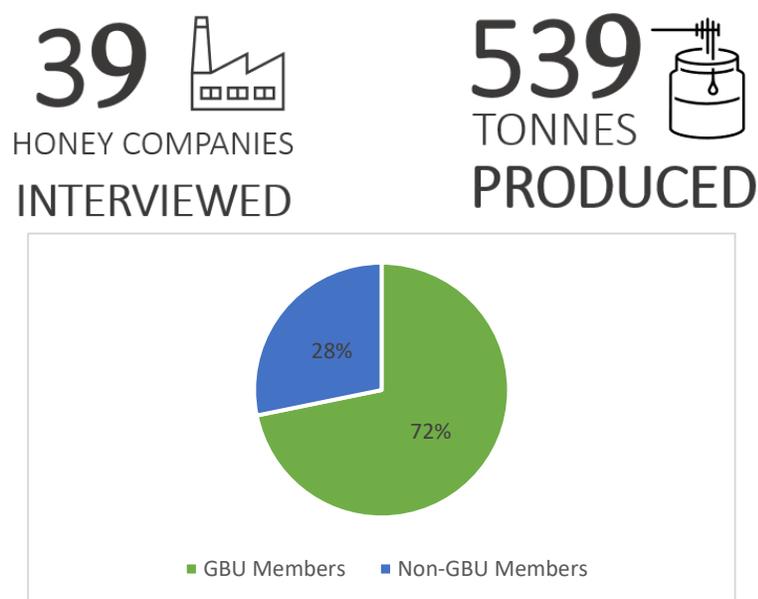


Figure 1 Number of companies interviewed, volume of honey produced by them and GBU membership

In parallel, an online survey of members of the Facebook group Georgian Bees which has up to 34,000 members was conducted by the ALCP2 to find out roles the Georgian Bee group members play in beekeeping and how many of them were practitioner beekeepers. In total, 661 members participated in the survey, 52% of whom were beekeepers themselves the rest of the roles according to the responses can be found in Figure 14.

OVERVIEW

Honey producer companies that have diversified sales markets and export, process more honey annually, collect from more beekeepers and collect twice as much honey from supplier beekeepers than companies that sell honey only domestically. Beekeepers now have more access to formal markets, reducing the share of sales to neighbors, acquaintances and relatives known as informal markets, which was practically the only sales channel for beekeepers back in 2014 when Alliances started work in honey sector in Georgia. However informal markets for individual and smaller beekeepers are still a significant sales channel. **Formal markets tend to provide more stability with the main advantage being the ability to sell an entire crop in one go, and generate a significant sum of income, which is then often reinvested into the enterprise.** The following report demonstrates how much the honey sector has changed since 2014 when there was almost no export.

SUPPLY MARKET

Before entering into the breakdown of the characteristics of the honey companies themselves it is useful to have a picture of the beekeeper suppliers of honey to these companies and to the wider market, domestic and export, informal and formal. It provides the context from which to better understand the operations of the companies themselves as well as the market system dynamics.

Approximately 14,074¹ households in Georgia are engaged in beekeeping. Of these, 52% are small-scale honey producers (with up to 20 hives), 37% operate on a mid-scale, and only 12% are large-scale producers. The survey highlighted a direct correlation between the scale of production and the sales characteristics and behaviour of beekeepers. Small-scale producers typically have informal and irregular sales, with their selling points limited to neighbors, relatives, and acquaintances. A major challenge they face is limited access to training and information, which is not surprising given that only 20% of small-scale beekeepers are members of the GBU.

As production scales up, the market dynamics and behaviour of beekeepers evolve accordingly. Their markets become more formalized, and beekeepers increasingly rely on selling to other businesses, such as HoReCa and grocery shops. In recent years, honey production companies have begun to play a more significant role as buyers for mid-sized and large-scale beekeepers. These companies have gained greater access to the domestic market through the expansion of supermarket chains and have significantly increased their presence in export markets, which has seen significant growth

¹ According to State Statistics

over the past five years. The involvement and interest of middle-scale and large-scale beekeepers in sector-specific know-how and information are significantly higher than those of small-scale beekeepers. 75% of middle-scale and 90% of large-scale beekeepers are members of the GBU. They are more likely to attend training sessions, apply new knowledge, and actively participate in the Union's activities.

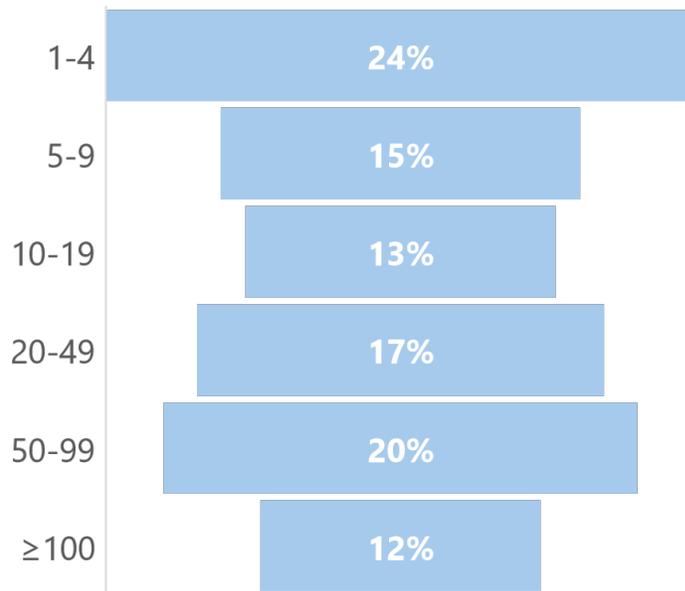


Figure 2 Hive ownership among Georgian Beekeepers and their demographics

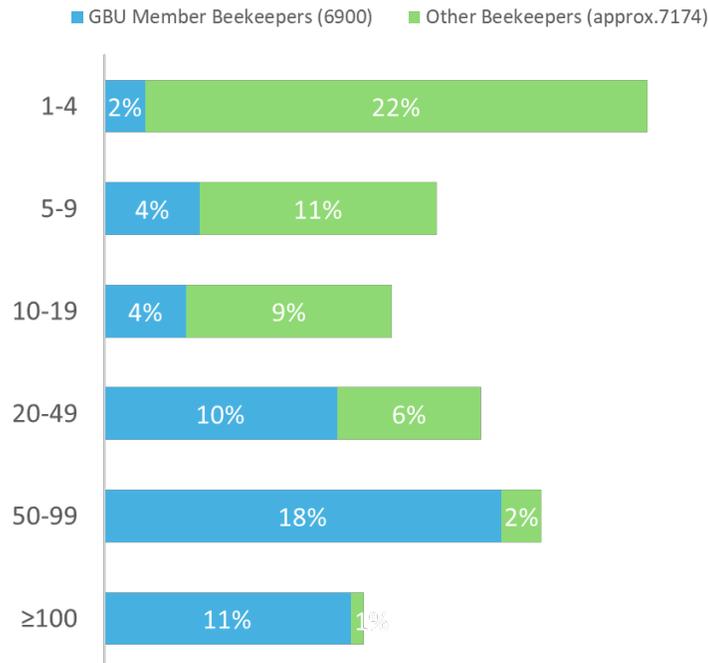


Figure 3 Hive ownership and membership of the Georgian Beekeepers Union

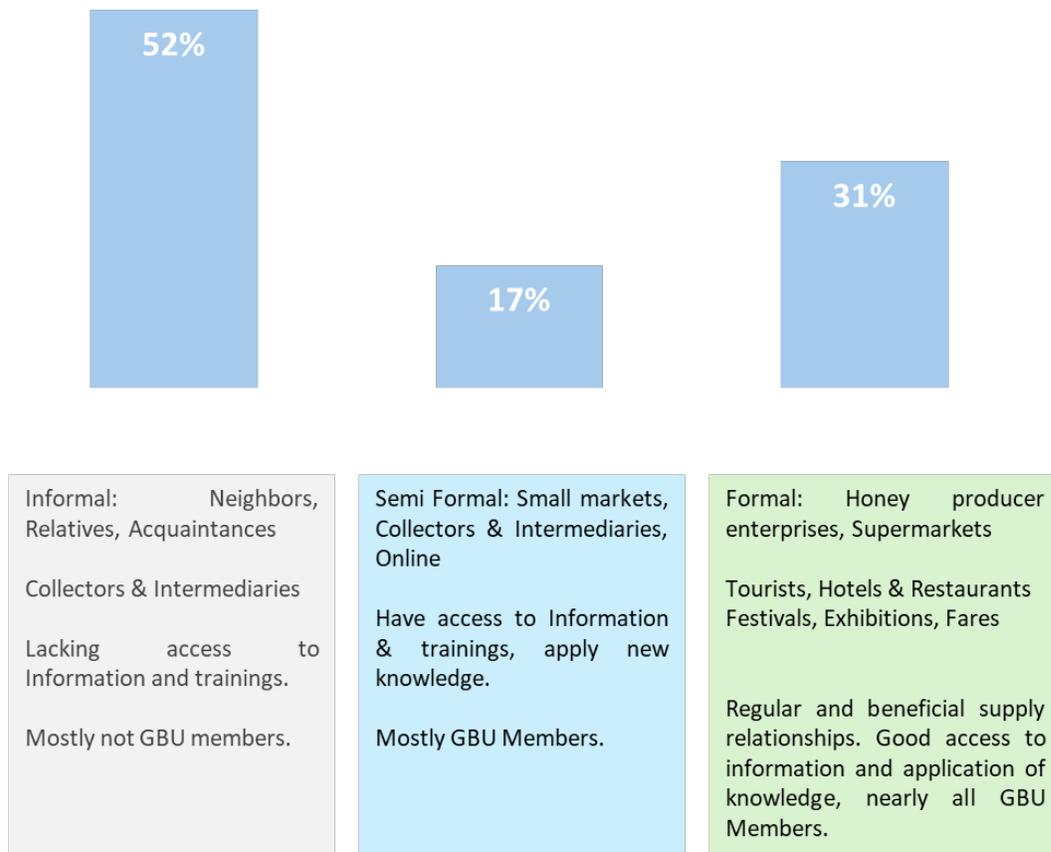


Figure 4 Sales Channel Characteristics for Georgian Beekeepers

COMPANY PROFILES

In the Georgian honey market, three main types of business operators are prevalent: limited liability companies (Ltd), cooperatives, and individual entrepreneurs (IE). Each of these business types is widespread for specific reasons. Over the past decade, government and NGO support programmes have played a pivotal role in the spread of cooperatives. However, in recent years, IEs and Ltds have become more preferable. IEs are typically mid-sized and large-scale beekeepers who have formalized and registered their businesses to supply groceries, HoReCa, or supermarket chains. Generally, they are not consistently active and have irregular formal sales. Ltd companies, on the other hand, are larger producers with regular sales channels. Their numbers have significantly increased over the last ten years, primarily due to the growth of the HoReCa sector and the expansion of supermarket chains. Additionally, the significant rise in Georgian honey exports has played an important role in this trend, with 35% of the companies interviewed having exported honey.

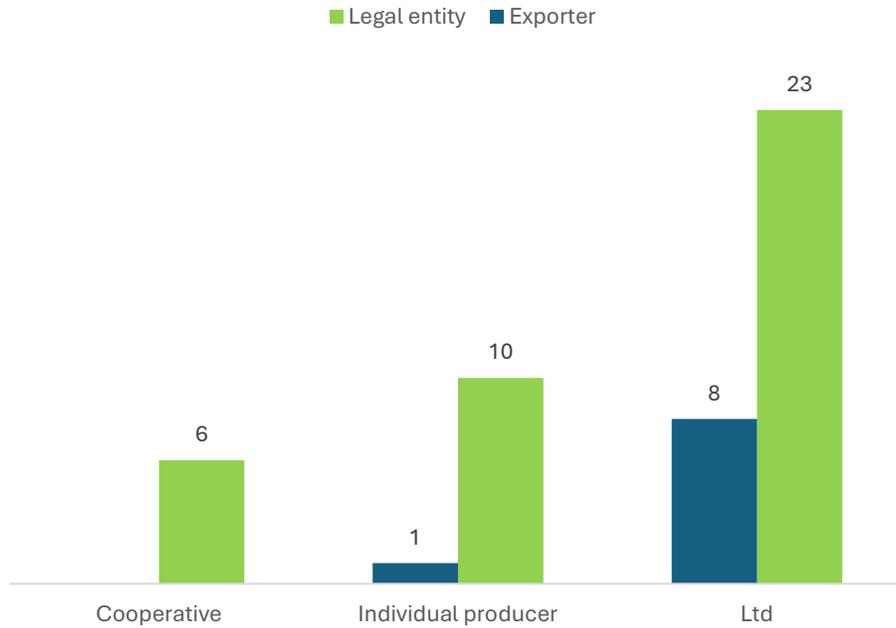


Figure 5 Honey companies by type of business and export activity

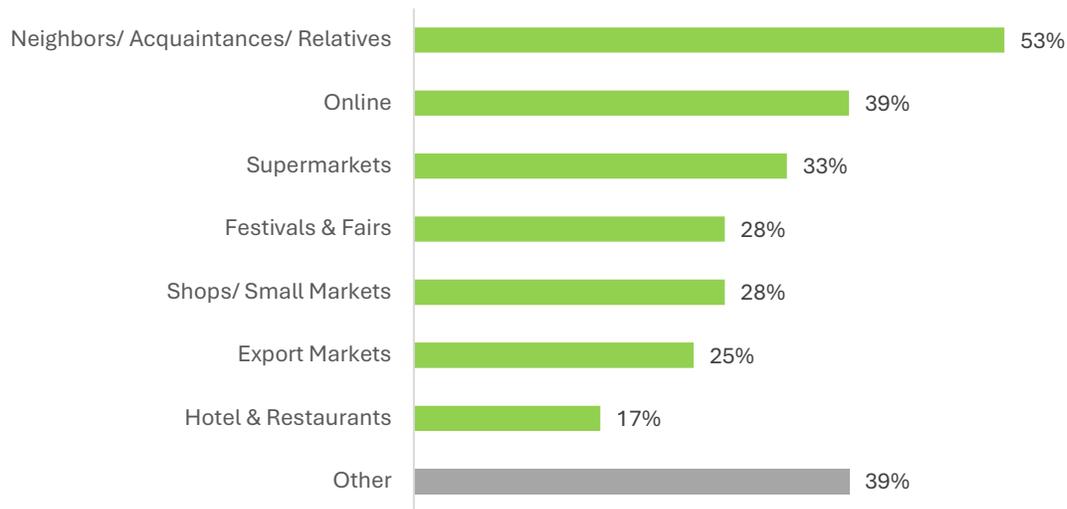


Figure 6 Honey selling points for interviewed companies

Note: Other includes selling to Local intermediaries (who sell honey across Georgian shops, to Turkey or Azerbaijan) and State tenders.

The survey findings are in line with the ALCP2 Beekeeping Sector Impact Assessment findings about the sales channel characteristics. According to the Impact Assessment, 31% of beekeepers are selling to more formalized value-added export markets through interviewed honey producer

companies. The more companies start to export, the more beekeepers have more formal markets for their honey.

PRODUCTION AND AGGREGATION

Figure 7 highlights significant disparities in honey production and the number of supplier beekeepers among different legal entities. LTDs lead in both honey volume and the number of suppliers, followed by Individual Entrepreneurs. In contrast, cooperatives, which generally source honey only from their member beekeepers, show notably lower production volumes and fewer suppliers.

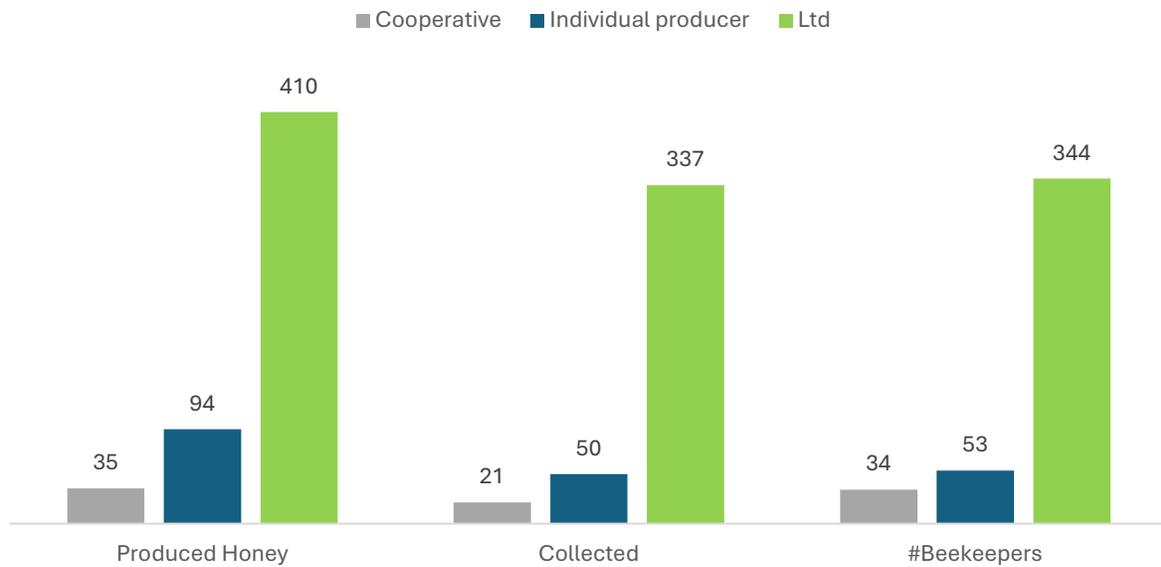


Figure 7 Honey production, collection (tonnes), & number of beekeepers per type of business

It has been revealed that honey-exporting companies in Georgia produce and collect a larger amount of honey from more beekeepers than those selling honey locally. In 2023 exporting companies produced 16% more honey, gathered 45% more honey, worked with 34% more beekeepers compared to those companies selling locally.

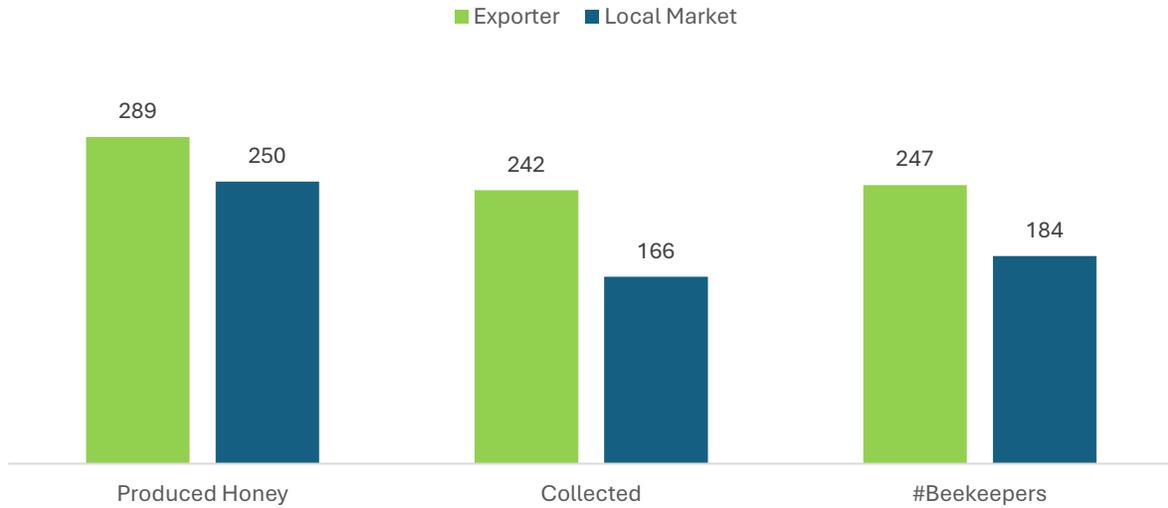


Figure 8 Honey production, collection (tonnes), & number of beekeepers by exporter and local market business

Mixed flower honey, along with acacia and chestnut, is the most commonly produced honey by the interviewed companies.

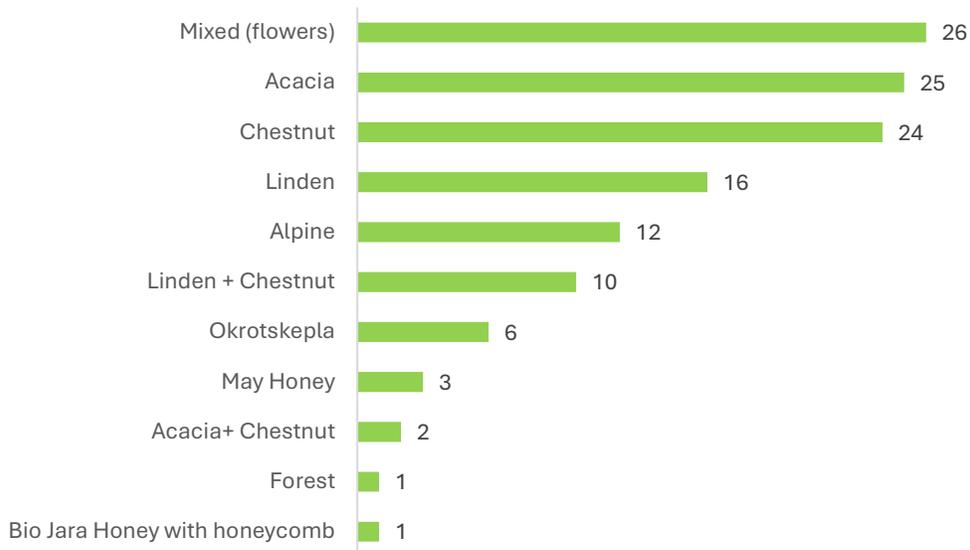


Figure 9 Type of honey produced by interviewed companies

Out of 39 interviewed companies, 21 companies (54%) produce other bee/honey products. Most of them produce Royal Jelly, Propolis, Bee bread and Bee pollen.

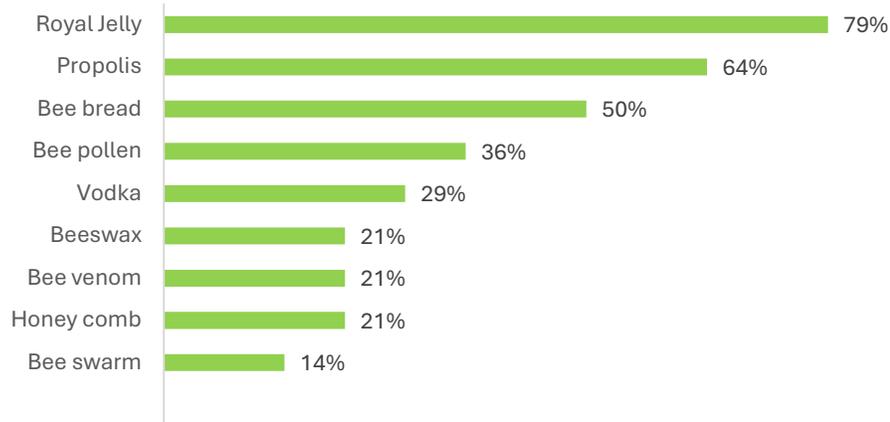


Figure 10 Other bee/honey products produced by the companies (out of 54% who said yes)

Companies collect honey from various regions across Georgia, with the primary areas being Imereti, Samegrelo-Zemo Svaneti, Guria, and Racha-Lechkhumi-Kvemo Svaneti. This indicates that Western Georgia serves as the main hub for honey aggregation.

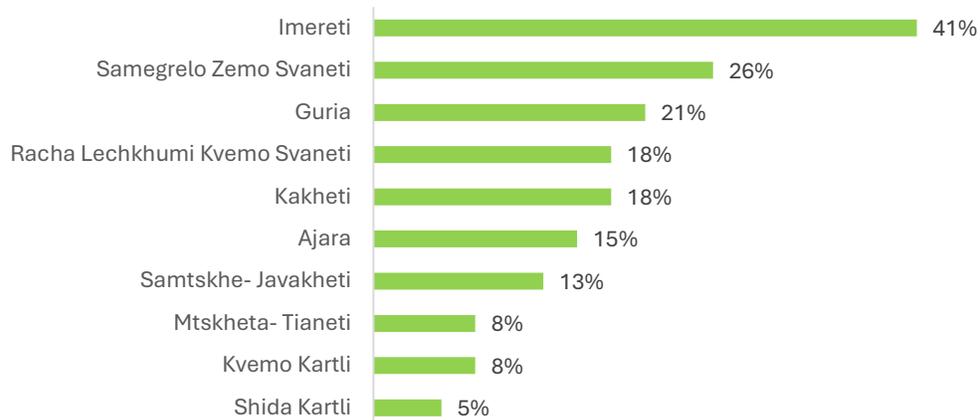


Figure 11 List of regions where the interviewed companies collect honey

INTRODUCTION/ HISTORY

Social media serves as a vital platform for communication among Georgian beekeepers. This trend is largely attributed to the Facebook group [Georgian Bees](#). It was created in 2015 by Avksenti Papava, a beekeeper and a beekeeping VET teacher from Samegrelo region, and the executive director of the Georgian Beekeepers Union (GBU founded 2018), which was founded with the intention of uniting diverse beekeeping interests under one umbrella for the good of the sector and which currently unites 44 members (10 beekeeping associations and 34 private companies) since 2019.

Georgian Bees was the first online community of beekeepers in Georgia². Mr. Papava recognized the potential of social media to address the scattered and fragmented opinions prevalent among beekeepers across Georgia. He believed that by joining forces, they could share knowledge, help one another, and make positive changes in the beekeeping industry. Through his leadership and passion for beekeeping, he hoped to strengthen connections among beekeepers and improve overall success. Because of his background as both a teacher and an experienced beekeeper, many other beekeepers joined the group he initiated. *Georgian Bees* linked beekeeping enthusiasts and professionals across Georgia to share knowledge, expertise, and learning materials. Similar to the fundamental concept of the GBU, *Georgian Bees* acts as an umbrella platform for various groups, which was why the ALCP had approached Mr Papava when the idea surfaced of the need to create the Umbrella organization which became the GBU.

Today, *Georgian Bees* is a well-moderated beekeeping Facebook group that offers educational resources, training information, regulatory updates, and a space for discussion which can provide a rich and supportive community for beekeepers to enhance their skills, address challenges, and stay connected with industry developments.

To date the group has over forty informational resources³ in its library, all accessible to its members. Most of posts are informative and educational. Group administrators constantly monitor and remove non-thematic posts and comments. Initially the group was public but later it transitioned to a *Private Group* where only members see and engage in the posts published as this provided a space where beekeepers could freely engage in dialogue and discussions.

² There are now sixteen Georgian Facebook groups about beekeeping. One group (Beekeeping / მეთევზეკრეობა) was created in 2018 and has 17,000 members (these people are the Georgian Bee members as well), and others were created after 2020 and have from 500 to 1,000 members on average.

³ About different types of Bee diseases; Hygiene standard for apiaries; Apiary works for beekeepers in different seasons, Production of Beekeeping Products, Queen Bee Breeding

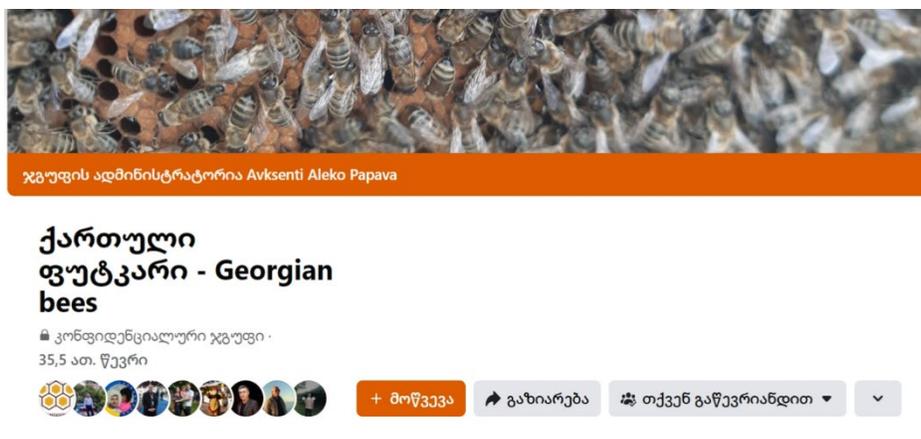


Figure 12 Georgian Bees Facebook Page

STRENGTHING GEORGIAN BEES THROUGH THE GBU

When from 2018, when [the Georgian Beekeepers Union](#) was founded, the Union started systematically disseminating sector related information and key messages to beekeepers through Georgian Bees. Group members increased almost seven times (580%) and reached almost 34,000 at the beginning of 2024, out of which 22,000 are active members.⁴ See *Figure 13. Below*.

Georgian Bee Facebook page members 2018-2023

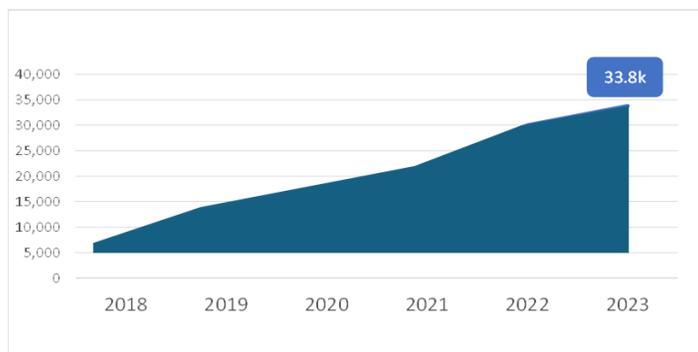


Figure 2 Georgian Bee Facebook group members 2018-2023

Figure 13 Georgian Bees Members 2018 - 2023

WHO ARE THE GEORGIAN BEES GROUP MEMBERS?

According to Facebook statistics, out of 34,000 members 88% are accessing the group from Georgia and 12% from foreign countries e.g. Italy, Turkey, Greece, USA, Germany, most of whom are Georgian emigrants. 36% of the group users are female and 64% are male. The user distribution across age groups is fairly even, with the largest proportion (25%) falling into the 35-44 age category and the smallest (5%) in the 18-24 range.

⁴ The users who regularly participate in discussions, post content, comment, react to posts, or engage with other members within the group.

According to the Facebook group survey, 52% of members, are beekeepers and 19% are persons interested in beekeeping, 6% are family members of beekeepers, 9% are honey & bee products and inputs producers and 5% are consumers. Figure 14. below shows the distribution of the roles according to the responses (661) provided by the members.

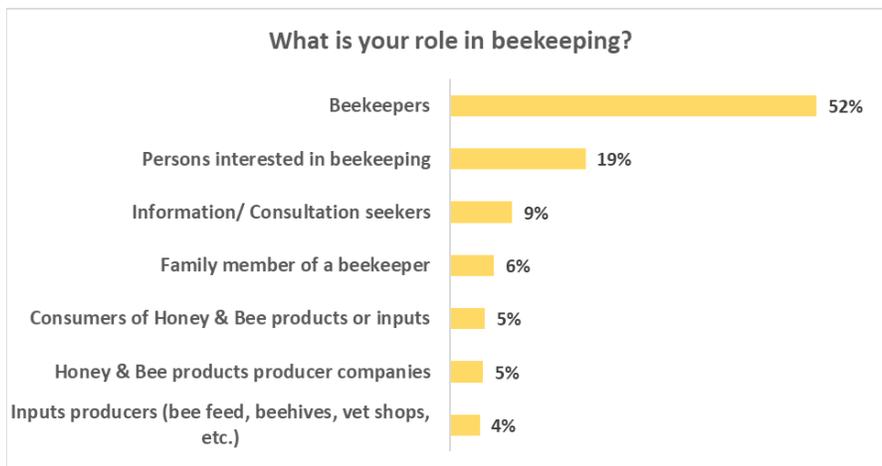


Figure14 Georgian Bees Members Roles in Beekeeping

The survey showed that most of the group members are beekeepers or persons interested in beekeeping, which means that all the information shared in the group is relevant to the target audience and reaches most of the beekeepers in Georgia⁵.

WHAT DOES THE GROUP OFFER TO ITS MEMBERS?

The group offers the following to its users:

- Free advice & consultancy
- Free Educational materials
- Information about the relevant state regulations
- Media reports and news in beekeeping
- Promotion of best practices
- The GBU Saturday live streams
- Paid advertising on honey, bee products and inputs (from 2023)

Member benefits:

- *Best Practices:* The group serves as a platform for sharing best practices in apiary management, hive maintenance, bee treatment and beekeeping techniques, enabling members to optimize their beekeeping operations.
- *Collaborative and Supportive Community:* The group provides a platform for members to discuss their experiences, ask questions, and share insights, fostering a collaborative learning environment. When members encounter challenges or issues in their beekeeping endeavors, the group offers a supportive community where they can seek advice, share experiences, and find solutions.

⁵ State Statistics show that there are approximately 14, 074 beekeepers in Georgia.

- *Educational Resource:* members can access and share educational materials, including articles, videos, and infographics, to enhance their understanding of beekeeping practices.
- *Connection with Fellow Beekeepers:* Members can connect with beekeepers in their region, facilitating networking opportunities and the exchange of practical advice based on local conditions.
- *Information on Available Trainings,* details about upcoming beekeeping workshops, seminars, and training programs, helping members enhance their practical skills and knowledge.
- *Regular updates on state regulations* ensure members are aware of any changes in beekeeping laws, permits, or guidelines, helping them stay compliant with local authorities.
- *Information about Grant Opportunities available in beekeeping sector is disseminated in the group, which allows members to get timely information and opportunity to access grants.*
- *Updates on Industry Trends:*The group members share the latest research findings, technological advancements, and trends in the beekeeping industry, helping members stay informed about innovations.
- *Trade Platform:* Members use the group as a marketplace to trade beekeeping products⁶ and equipment⁷. Honey producer companies regularly announce the aggregation of honey and connect with supplier beekeepers through the group. Beekeeping Input Supplier companies promote their products through the group, which serves as a trusted source for beekeepers.
- *Events and Meetups:* beekeeping-related events, field trips, or local meetups are announced in the group, fostering a sense of community among members.
- *Environmental Advocacy and Awareness raising:* The group serves as a platform to raise awareness about the importance of bees and pollinators in the environment, promoting environmental stewardship.

The group has significantly contributed to the GBU's as an organization by:

- ***Sharing information materials:*** The GBU shares its materials; (infographics, videos, live streams, interviews) and gets valuable feedback and brings attention to the relevant topics.
- ***Disseminating Training information:*** The GBU announces and promotes training sessions or other educational events organized by the Union. The active engagement of the group contributes to high attendance rates at these events, as members are notified and encouraged to participate.
- ***Positioning the Union as the leading organization in the sector:*** the GBU showcases its leadership role and commitment to support the interests of beekeepers. This helps to establish the Union's authority within the beekeeping community, positioning it as a trusted and influential organization in the field.

User Satisfaction

According to user comments, group members seem satisfied with the information they receive, especially about bee diseases. The posts that are about apiary management and includes questions about recommendations for solving a concrete case, tend to have more engagement from the group users. Beekeepers are openly engaged and sharing their opinions, practices and are keen to support each other. Beekeepers concerns are mainly related to ineffectiveness of bee medicines or inability to fight diseases.

⁶ Different types of honey, royal jelly, propolis, beeswax, etc.

⁷ Bee colonies, bee hives, hive frames, bee feed, vet medicines, honey flower seeds and seedlings, etc.