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ASSESSMENT REPORT

for Honey Production, Marketing and Value Chain Modelling in the Rupununi



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Report Completed by:
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for the Rupununi Livestock Producers' Association (RLPA)

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Special thanks are extended to the beekeepers, retailers, and consumers whose knowledge and experiences informed this assessment and highlighted key opportunities and challenges within the Rupununi honey sector. Appreciation is also extended to the Guyana Livestock Development Authority (GLDA), Kanuku Mountains Community Representative Group (KMCRG), village councils, and all partner institutions for their continued support of sustainable beekeeping and honey value chain development in the Rupununi.



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OVERVIEW

This report presents an assessment of Honey Production, Marketing, and Value Chain modelling in Rupununi, prepared for the Rupununi Livestock Producers' Association (RLPA). It examines the honey production process, marketing readiness, value chain opportunities, and business and organisational models to develop beekeeping as a sustainable livelihood that supports income generation, biodiversity conservation, and inclusive participation by small-scale beekeepers, women, youth, and Indigenous communities.

The assessment finds that beekeeping in the Rupununi remains in its early stages of development. Most beekeepers operate small apiaries, with 1–5 active hives, and many entered the sector through donors or government-supported equipment and training. Honey production remains low and inconsistent, while recordkeeping, packaging, labelling, pricing, and post-harvest systems are underdeveloped. Beekeepers need access to technical support, market linkages, and affordable equipment, such as bee boxes, to house new colonies and increase production.

Despite these challenges, Rupununi honey has strong potential. It commands high prices through local direct sales, fairs, expos, village networks, and events. The Rupununi's biodiversity, protected areas, Indigenous communities, and nature-based tourism provide a solid foundation to position honey as a premium, traceable, conservation-linked product. This is particularly attractive to tourists, health-conscious consumers, ethical buyers, and customers who value authenticity, purity, and environmental stewardship.

A major threat to the sector is competition from lower-priced imported honey and honey-like products, particularly from Brazil. This risk is increased by the limited local capacity to test for adulteration. Protecting Rupununi honey will therefore require stronger quality assurance, traceability, labelling, consumer awareness, and coordination among producers, regulators, government agencies, and market actors.

The report identifies three principal customer segments: **price-conscious buyers, nature and conservation**



tourists, and health-conscious buyers. Each segment requires a different value plan, ranging from affordable local honey to premium branded products linked to conservation, traceability, ethical sourcing, and product purity. Meeting these market opportunities will require improvements in production volume, product consistency, packaging, certification readiness, logistics, and market relationships.

Organizationally, the assessment concludes that a hybrid business model is the most practical pathway for developing the Rupununi Honey sector. Independent beekeeping should continue to operate where applicable, while community-based beekeeping groups can support peer-to-peer learning and new beekeepers, and create access to shared equipment, thereby lowering operating costs.

At the sector level, a strengthened Rupununi-based mechanism, potentially coordinated through RLPA, the Region 9 Department of Agriculture, and other key partners, would provide essential services, including quality assurance standards, certification support, market development, research, partnerships, and technical support. With this approach, Rupununi Honey aims to build a competitive, organised, and resilient honey industry throughout the region.

The key recommendations include:

- Increase participation by women and youth
- Establish a Region 9 honey working group
- Increase hive numbers for growth-oriented beekeepers
- Strengthen technical, business, and record keeping skills
- Improve access to equipment, colonies, and affordable inputs
- Link beekeeping with conservation outcomes by creating a conservation honey brand
- Protect Rupununi honey from adulterated or low-cost substitutes.

Overall, the sector's growth should be continuous, coordinated, and quality-focused to ensure that increased production is aligned with stronger standards, market access, and long-term value for Rupununi producers.



METHODOLOGY DESCRIPTION

The methodology combined direct engagement with beekeepers, prospective beekeepers, wild honey harvesters, and key institutional stakeholders to ensure that the findings reflect both practical field realities and broader sector-level perspectives.

A survey questionnaire was administered to beekeepers and key stakeholders in the Rupununi through in-person and telephone interviews, using Computer-Assisted Personal Interviewing (CAPI) and Computer-Assisted Telephone Interviewing (CATI).

The sample frame was based on a list of beekeepers from the Rupununi Livestock Producers Association (RLPA), supplemented by lists from the Guyana Livestock Development Authority (GLDA) and the Region 9 Department of Agriculture. Respondents included active beekeepers, individuals trained in beekeeping who had not pursued it, and those involved in commercial wild honey harvesting. In total, 35 respondents were interviewed: 13 by telephone and 22 in person.

The data collection process included quantitative surveys and Key Informant Interviews (KIIs). KIIs targeted stakeholders such as GLDA, and RLPA representatives and individuals knowledgeable about the honey sector's development in the Rupununi.

A "Honeybee Perceptions" survey was also administered to potential beekeepers and the public to assess their knowledge and attitudes toward bees and beekeeping.

SECTION 1

HONEY PRODUCTION ASSESSMENT



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1.1 | BACKGROUND

SCOPE OF THE ASSESSMENT

The Rupununi Livestock Producers Association (RLPA), with support from WWF under the EU-funded Sustainable Forest Livelihoods Project, is strengthening beekeeping as a sustainable livelihood in Region 9, Guyana. Honey production has been identified as a priority value chain due to its income-generating potential, contribution to biodiversity conservation, and suitability for women and small-scale farmers.

This assessment is focused on the production of honey in the Rupununi (Region 9) and complements other aspects of a broader consultancy including a market assessment and business model recommendations.

NATIONAL CONTEXT

There is currently no Strategic Plan for the Ministry of Agriculture in the public domain. The last MoA Strategic Plan (2013 – 2020), proposed to expand beekeeping, draft an Apiculture Bill (by 2015), and increase the production of honey and value-added honey products .[1] The current applicable legislation is the Importation of Bees Act from 1935, last amended in 1997.[2]

In 2023, the Governments of Guyana and Cuba signed a Memorandum of Understanding (MoU) to support the expansion of the local honey industry.[3] At the 2025 GLDA Honey Fest, the Minister of Agriculture indicated that the number of registered beekeepers (across the country) had increased by 33% from 160 to 213 within the preceding 12 months. Further, the Minister indicated that "...honey production had increased from 2,128 gallons in 2023 to 27,601 gallons at the end of 2024, and in 2025, is projected to surpass 30,000 gallons." Further "...The industry is actively transitioning from individual hives to standardized commercial operations. By expanding honey production to over 5,000 hives, Guyana aims to achieve self-sufficiency and become a regional honey exporter by 2030."

Initiatives to strengthen the sector include the distribution of apiculture starter kits, part of a broader $120 million investment to strengthen honey production and foster sustainable livelihoods[4] , similar to pronouncements made for hinterland communities[5].

The most recent large-scale agricultural livelihoods project in the hinterland, IFAD & MoA's HESAD project (2017 – 2025), saw very limited uptake of beekeeping (approximately 1% of all enterprise projects).

1 https://www.ptccb.org.gy/documents/MoA%20Agriculture%20Strategy%202013-2020%20.pdf

2 https://mola.gov.gy/laws/Volume%2013%20Cap.%2069.01%20-%2073.051695686854.pdf

3 https://www.guyanastandard.com/2023/10/23/guyana-inks-mou-with-cuba-as-it-eyes-production-of-mangroove-citrus-honey/

4 https://guyanachronicle.com/2025/06/26/govt-expands-apiculture-support-with-starter-kits-for-over-60-beekeepers/

5 https://dpi.gov.gy/president-ali-announces-transformative-initiatives-for-amerindian-communities/

1.1.2 | RUPUNUNI'S BEEKEEPERS

Our respondents are 35 individuals who have had or currently have a working relationship with bees in the Rupununi.77% of surveyed beekeepers were male, and overall, 94% identified as Indigenous.

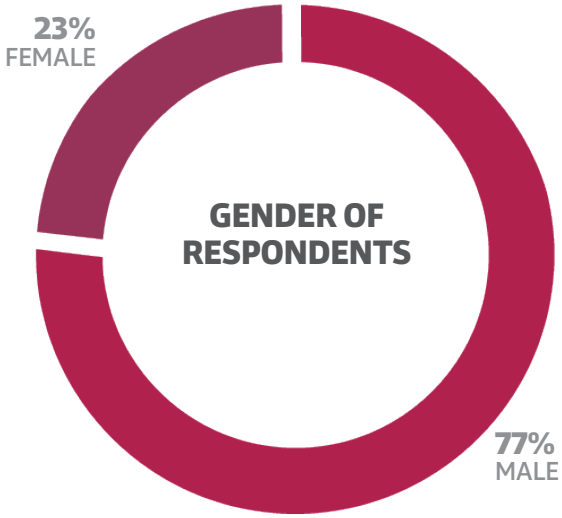


Figure 1: Gender of respondents

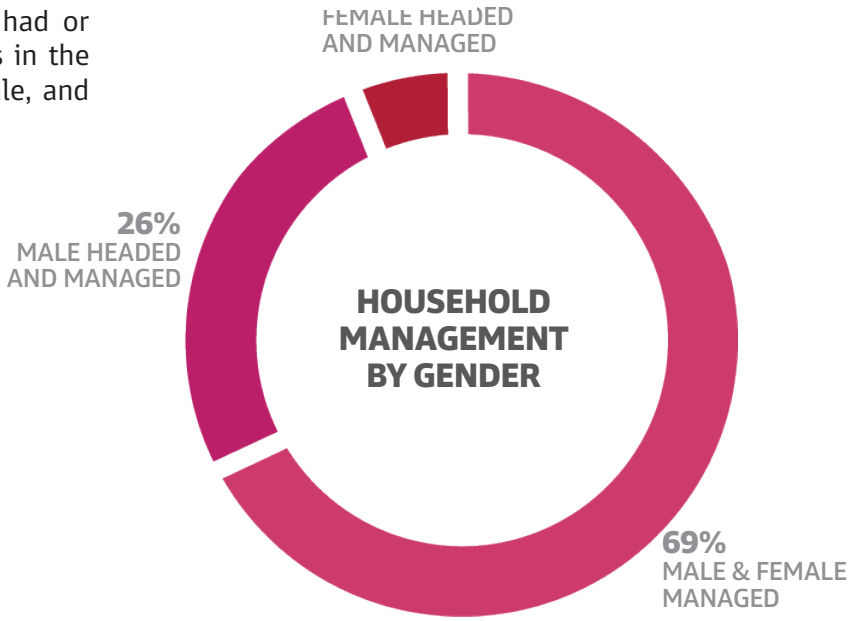


Figure 3: How is your household headed

Almost 70% of respondents lived in male and female jointly managed households, with an average of 5.9 persons per household (min: 2; max: 9).

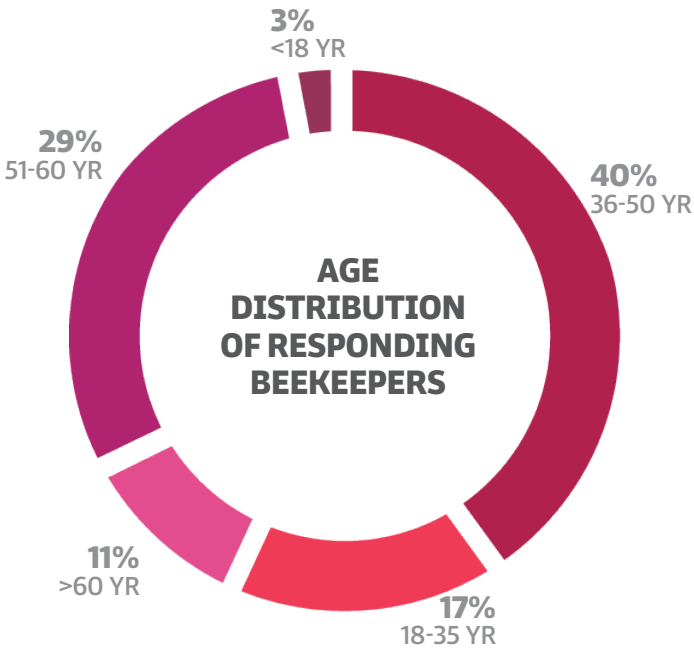


Figure 2: Age distribution of responding beekeepers

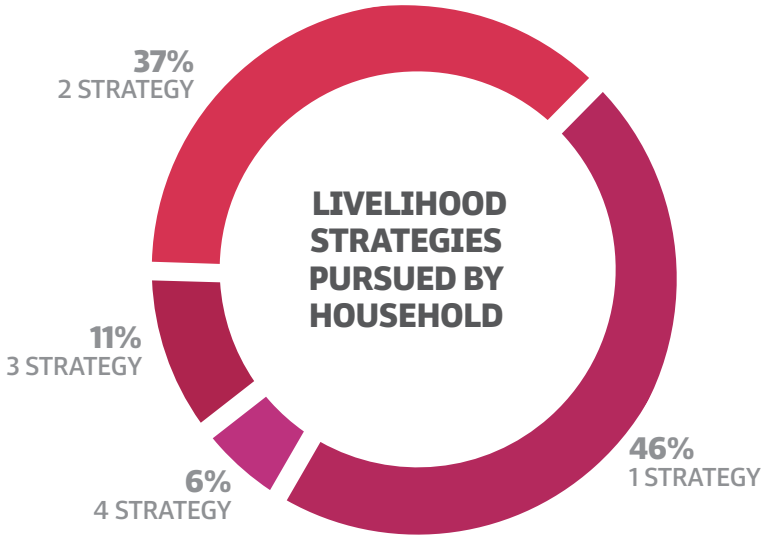


Figure 4: Other livelihood strategies households pursue other than beekeeping

80% of respondents were older than 35, and, conversely, only 20% would be considered youth by Guyana's definition.

Beekeeping complements other livelihood strategies pursued by households. 46% of households pursue one additional livelihoods strategy, while 37% pursue two additional strategies.

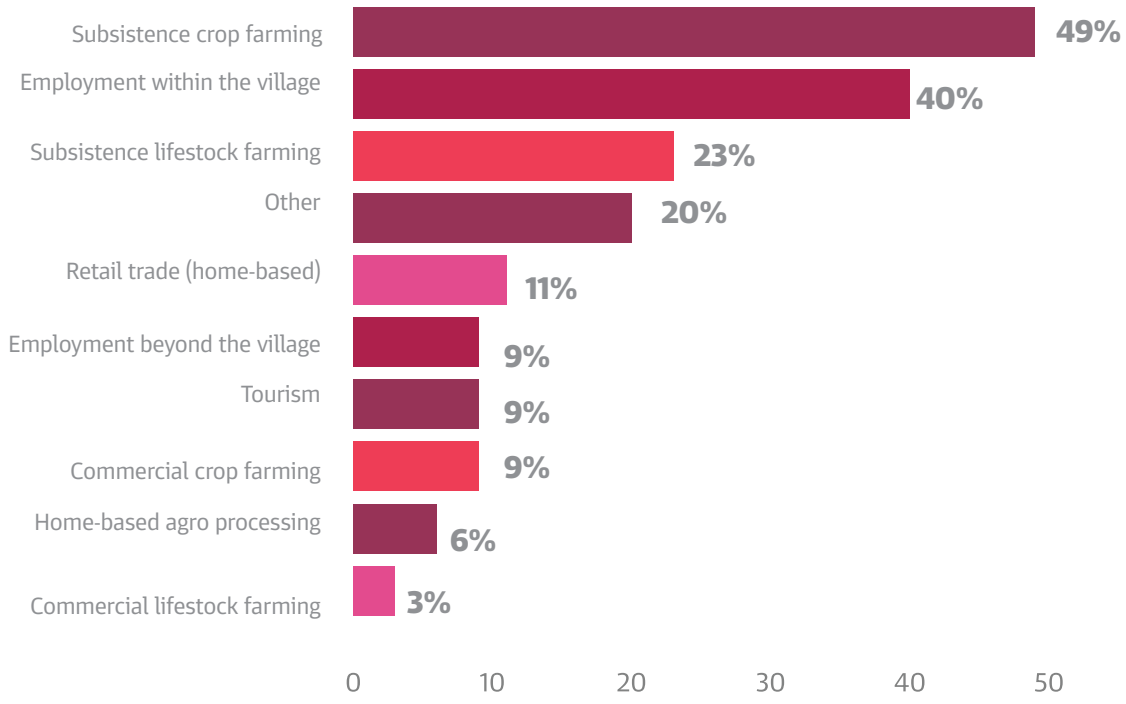


Figure 5: Livelihood strategies households pursue other than bees.

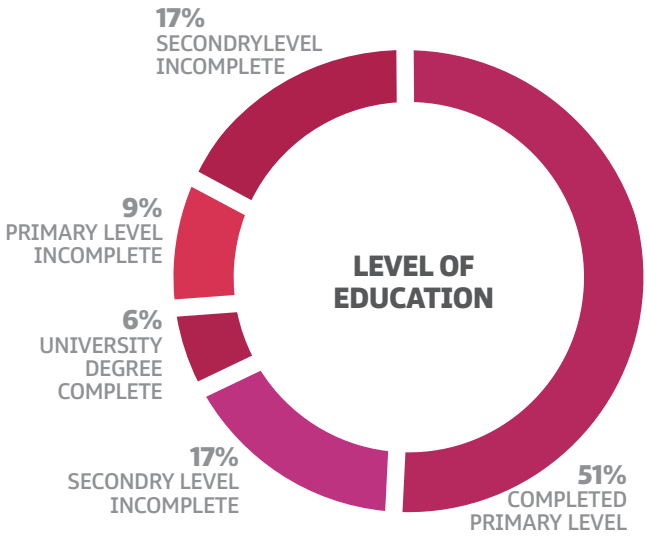


Figure 6: Showing the Level of education

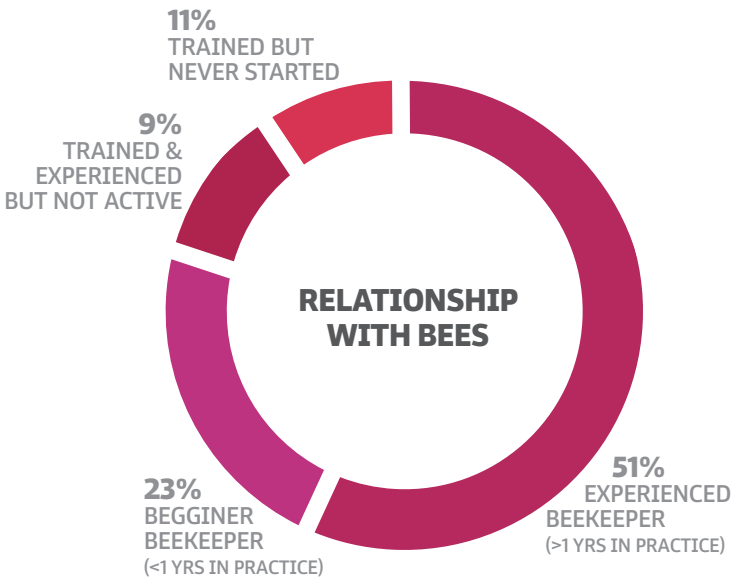


Figure 7: Relationship with bees

Asked to indicate which livelihood strategies their households pursued, 49% of all responses fell to subsistence crop farming, and 40% to employment within the village.

80% of beekeepers owned a smartphone; 74% accessed Wi-Fi at home, and 20% at the Village Wi-Fi hub.

23% of respondents were beginner beekeepers with less than 1 year of practice, while 11% had trained as beekeepers but had never started.

57% had one or more years of beekeeping experience, while 9% were no longer active.

60% of respondents had started in 2023-2024, and only 17% had more than 4 years of beekeeping experience. In almost half of all respondent households (43%), at least one other household member worked with bees. 38% of these persons worked with the responding beekeeper's bees, while 63% had their own hives.

Only 7% of responding beekeepers indicated that they employed someone in their beekeeping operation.

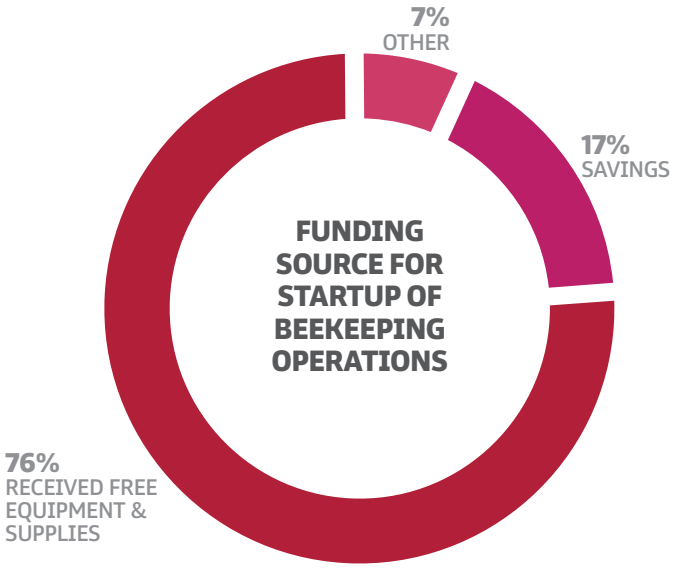


Figure 8; Showing how the start-up of beekeeping operations was financed



FINANCING: START-UP AND EXPANSION

More than three-quarters of respondents financed the start-up of their beekeeping operation from equipment and supplies provided free of cost by a third party. Only 17% used their own savings to get started. No one had used a loan (from a bank, or from friends & family) to start their operations. Asked how they have financed the expansion of their beekeeping operation since start-up, 72% of respondents indicated that their operation hadn't expanded, while 14% had expanded using resources provided by a third party, and 14% had used their savings.

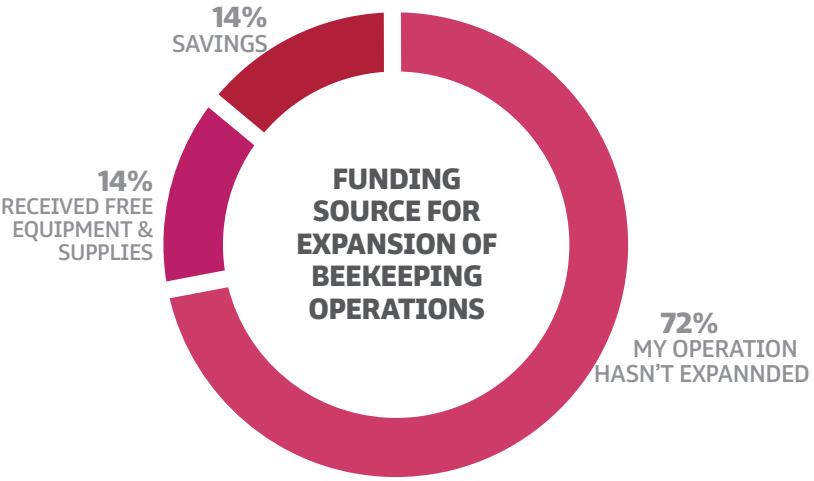


Figure 9: How the expansion of your beekeeping operation was financed





1.3| WILD HARVESTING

While no respondent identified as a wild honey harvester, eight respondents (23%) engage in wild honey harvesting. Most had started harvesting wild honey in the last 2 years and were selling it either within the village (70%) or in nearby villages (30%). Wild harvesters indicate that they predominantly harvest wild honey in the last 3-4 calendar months of the year.



1.4| PRODUCTION SYSTEMS

The honey production system is a comprehensive process in which beekeepers establish and manage hives and care for bees to enhance honey production. This system consists of two main components: production and post-harvest processes. The production phase focuses on good husbandry practices, including apiary management and record-keeping, whereas the post-harvest components focus on harvesting, processing, packaging, and storing honey. A successful honey production system leads to increased production, which depends on factors such as strong beekeeping skills, equipment, and environmental conditions.

1.4.1 | APIARIES

Almost three-quarters of responding beekeepers have 1-5 active hives, and only 4% have more than 20 hives.

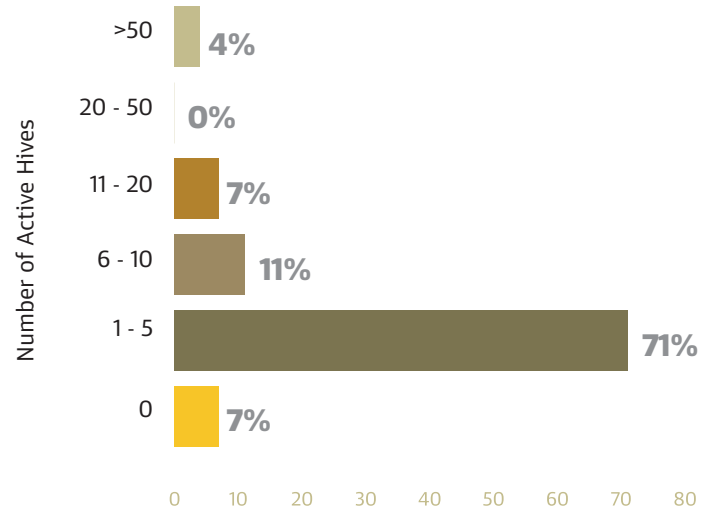


Figure 10: Number of active hives owned by beekeepers

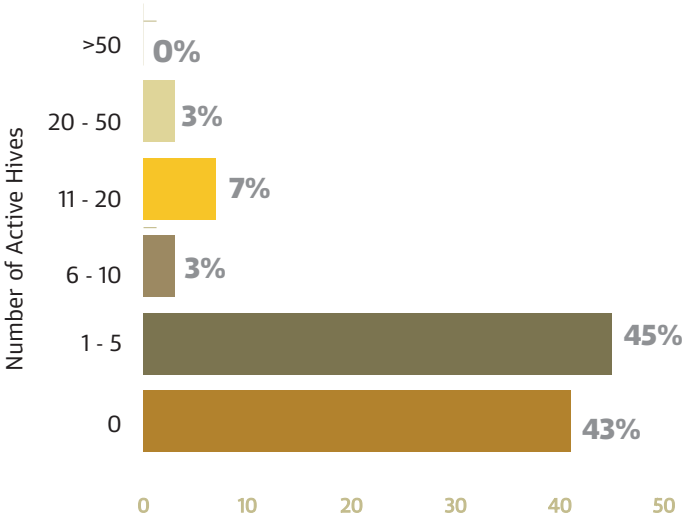


Figure 11: Number of inactive hives owned by beekeepers

In addition to active hives, beekeepers maintain inactive hives (hive boxes not currently in use). 41% of respondents have no additional hives, and an additional 45% have 5 or fewer inactive hive boxes.

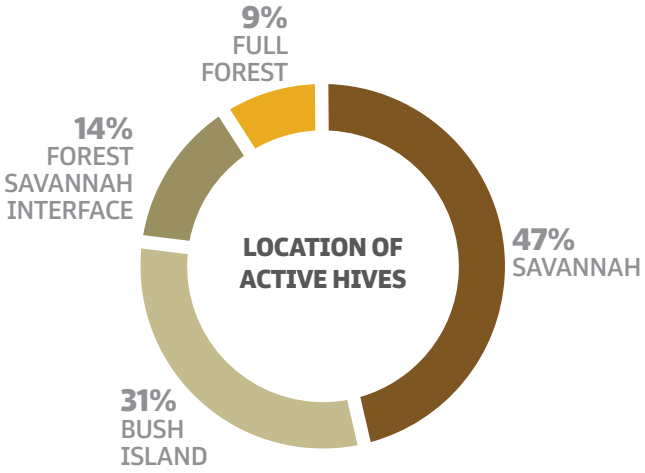


Figure 12: Location of active hives

47% of active hives are located in savannahs, 14% in the savannah-forest interface, and 31% in bush islands. Only 9% of hives are located in a full forest.
Only 14% of beekeepers report periodically moving their hives, typically once per quarter.

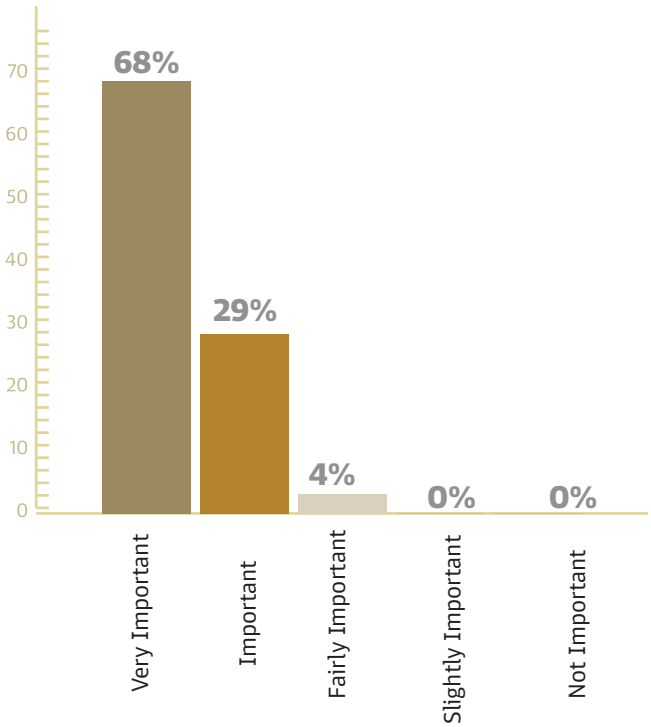


Figure 13: Showing how important it is to beekeepers to expand thier apiary

Overall, all responding beekeepers aspire to expand their apiaries, with 68% and 29% indicating that expanding the number of hives they operate is very important and important, respectively. On average, responding beekeepers aspire to a maximum of 67 hives, but this varies greatly between 5 and 1000 hives.

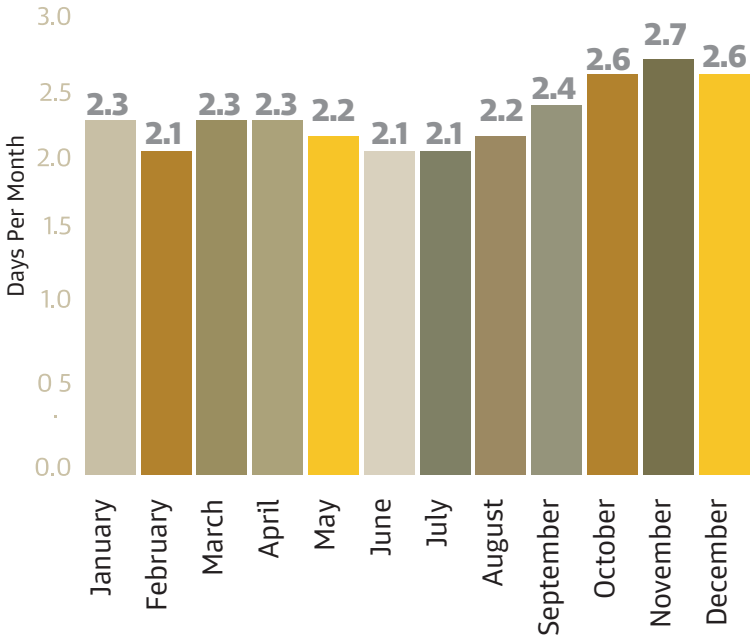


Figure 14: Number of days per month beekeepers typically spend on beekeeping activities per each calendar month.

Beekeepers spend an average of 2.3 days per month on beekeeping, with the last quarter being the most demanding in terms of days spent on beekeeping.

1.4.2 | PRODUCTION PRACTICES

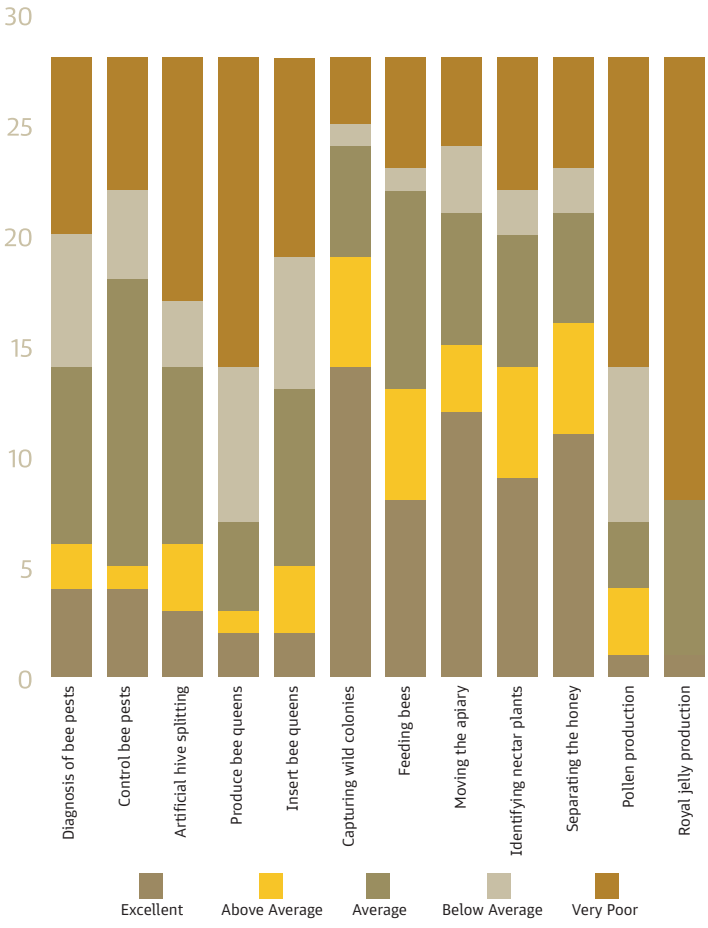


Figure 15: Experience and ability regarding key beekeeping skills

We asked responding beekeepers to rate their experience and ability as it related to beekeeping competencies. Using a combined score (not depicted) for each competency, responding beekeepers self-assess higher capabilities in capturing wild colonies (a combined score of 110), moving the apiary (100), separating honey (99) and feeding bees (97). Relatively lower capabilities exist for royal jelly production (36), pollen production, and queen bee production (both 54), as well as for inserting queen bees (67).

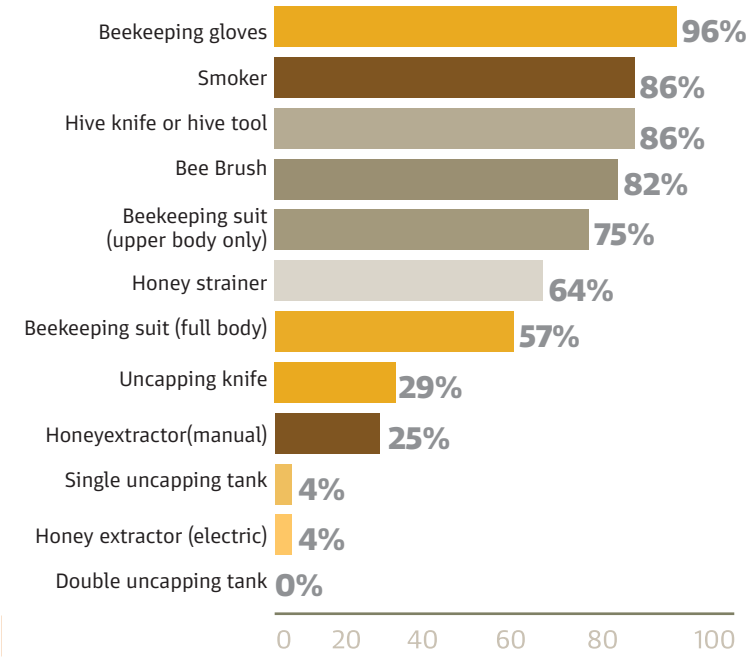


Figure 16: Ownership of beekeeping equipment



Most beekeepers report having basic beekeeping equipment – beekeeping gloves (96%), a smoker (86%), and a hive tool (75%), but only 75% report having a beekeeping suit. Beekeepers are less likely to own harvest and post-harvest equipment -uncapping tank (4%), a manual honey extractor (25%) or an uncapping knife (29%). Slightly more than a third of respondents (36%) use a queen excluder.



Figure 17: A beekeeper wearing full protective gear, including a bee suit, gloves, and boots, standing in a field with a smoker and equipment used for safe hive inspection.

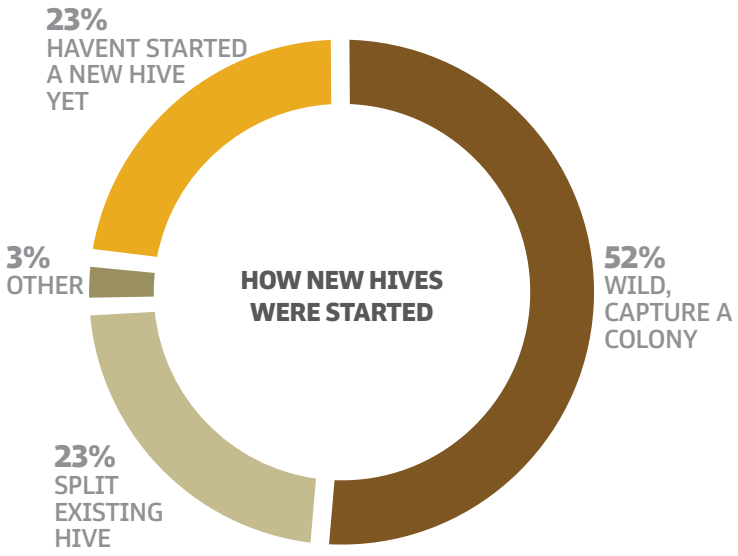


Figure 18 Showing how new hives were started

Capturing a wild colony is the most common method of starting a new hive, employed by 52% of respondents, while 23% split existing hives and almost a quarter (23%) had yet to start a new hive.

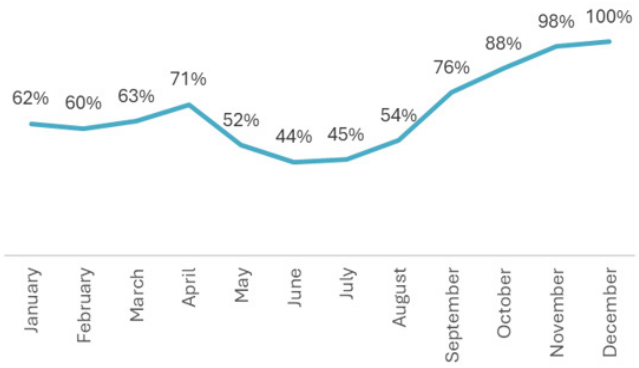


Figure 19: A natural wild bee colony in a tree. © Trever Smith

Beekeepers indicate that bee forage availability peaks in the last quarter of the year, with a maximum in December. A smaller peak occurs in April, approximately 71% of the maximum in December.
Only 14% of responding beekeepers reported growing bee forage, while 50% reported feeding their bees.



Figure 20: A natural wild bee colony in a tree.



Figure 21: Managed beehives.

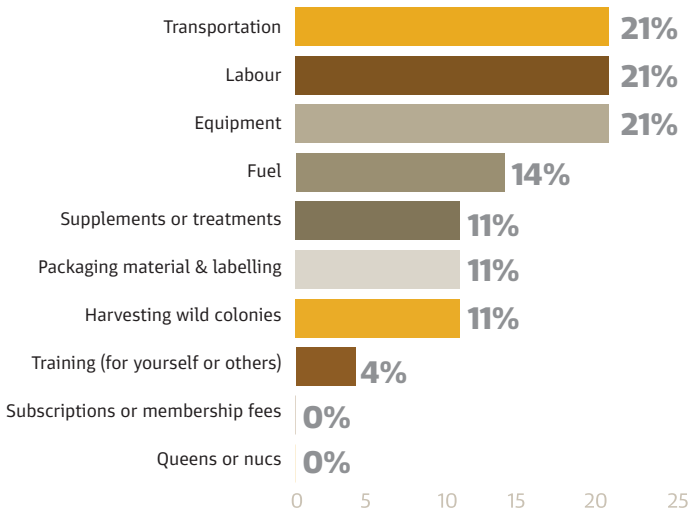


Figure 22: Showing what did beekeepers spend money on in 2024.

Approximately 1/5 of respondents (21%) reported spending money in 2024 on transportation, labour, and equipment.

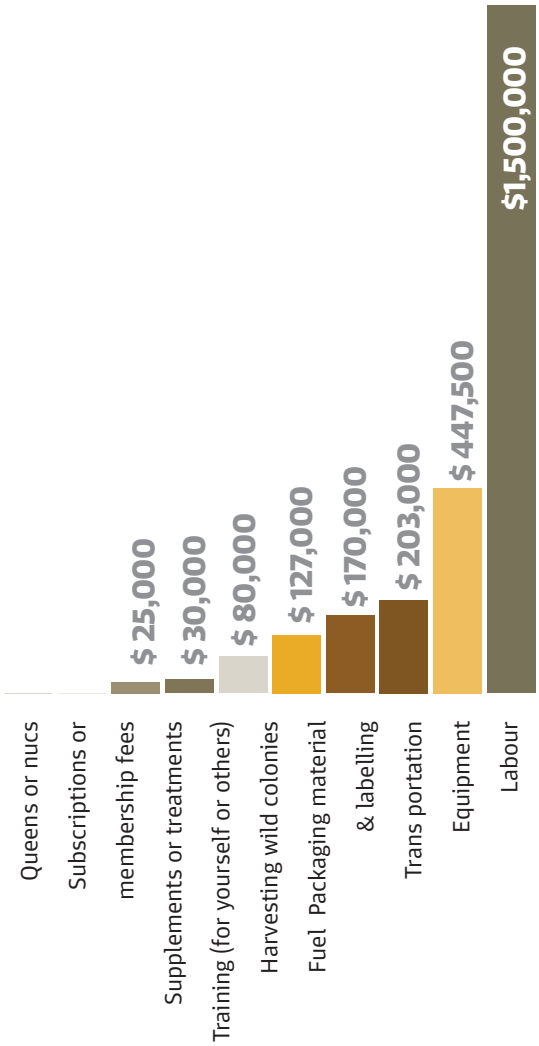


Figure 23: Cumulative spending for 2024 (all beekeepers)

Total reported expenditure in 2024, across 28 reporting beekeepers, did not exceed G$2.6M, or approximately G$92,000 per beekeeper.

A quarter of responding beekeepers indicate that they are required to provide a share of income from honey sales, or of honey, to their Village Council or beekeeping group.

Perceptions of what constitutes a good, average or bad year vary greatly. Across all responding beekeepers, a good year yields about 16 litres per hive (lowest value – 6 litres per hive; highest value 32 litres per hive), while in an average year, expectations are that a hive will yield 9 litres (range 3 litres to 18 litres). In a bad year, beekeepers expect yields of about 4 litres per hive (ranging from 0 to 10 litres).

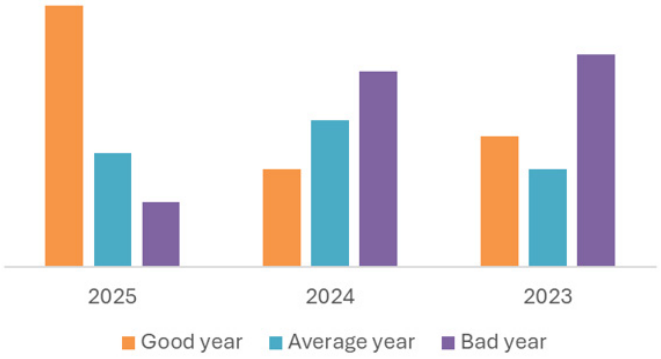


Figure 24: Showing Rate 2023 - 2025 in terms of honey production

By this measure, beekeepers view 2025 as a good year, while both 2024 and 2023 appear as bad years.

In 2025, with harvesting still underway at the time data for this assessment was being collected, 22 responding beekeepers reported production (year-to-date) at a total of 553 litres, but with one beekeeper accounting for 21% of this production. Discarding this outlier, average production currently lies at approximately 21 litres per beekeeper.

In 2024, total reported production stood at 983 litres, with one beekeeper accounting for 41% of all production, and two beekeepers together accounting for 75% of all reported production. Without these outliers, the average beekeeper produced 16 litres of honey in 2024. The available data does not conclusively indicate what production per hive is, but we estimate it to lie around 6 litres per hive.

No beekeeper reported producing byproducts (Bee pollen, beeswax, propolis or royal jelly) for sale in 2025.

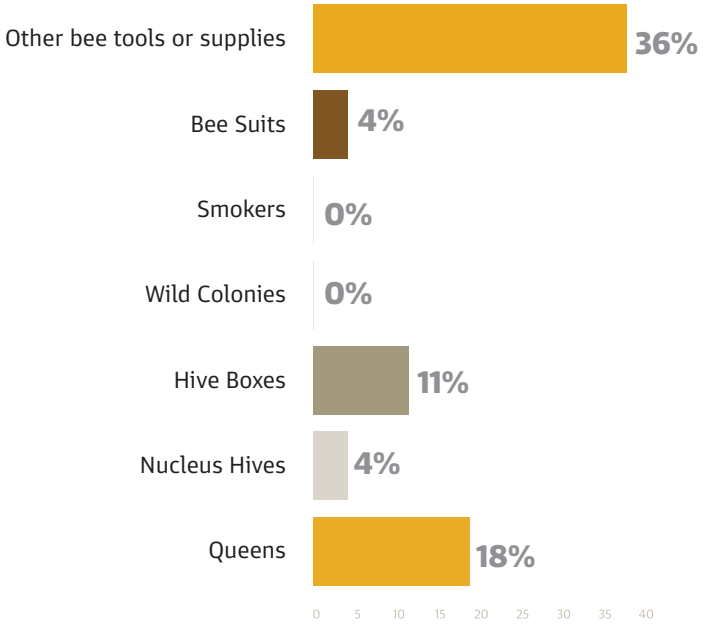


Figure 25: Showing Equipment produced for sale

In 2025, 18% beekeepers reported producing queens for sale, 11% hive boxes, and 36% other beekeeping tools or supplies.

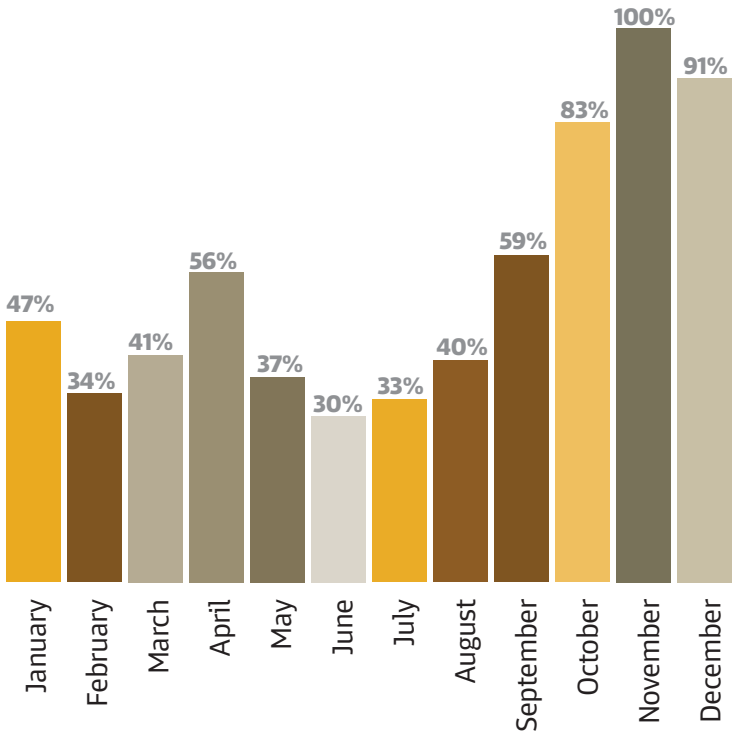


Figure 26: Approximation of honey flow across the year

We used perceptions of participating beekeepers as to the size of the flow in each month of a typical year. Honey flow appears to peak in the last quarter of the year, with a lower likelihood in April.

4.3 | POST-HARVEST

82% of respondents report that they consistently use the same type of packaging to sell their honey.

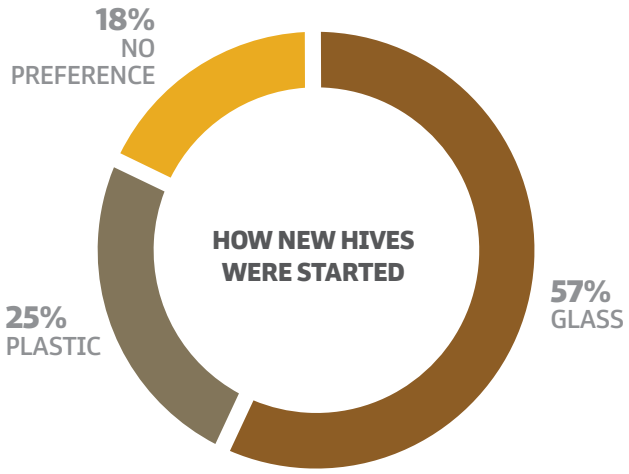


Figure 27: Packaging honey - material preferences

57% of responding beekeepers prefer to use glass packaging for their honey, while 25% prefer to use plastic, and 18% had no preference.

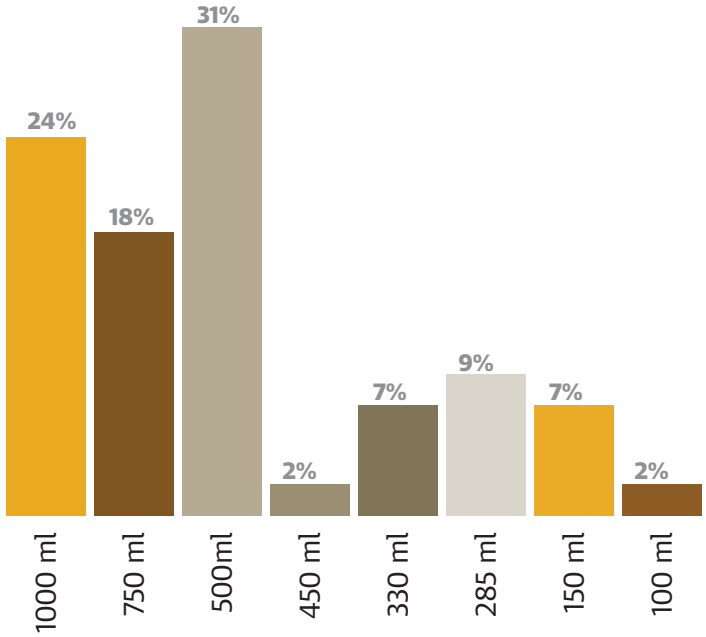


Figure 28: Approximation of honey flow across the year

Beekeepers perceive 500ml (1/2 litre) as the most popular size, followed by 1-litre and 750ml.



Figure 29 Honey packaging in glass jars (500 ml) and plastic bottles (300 ml).

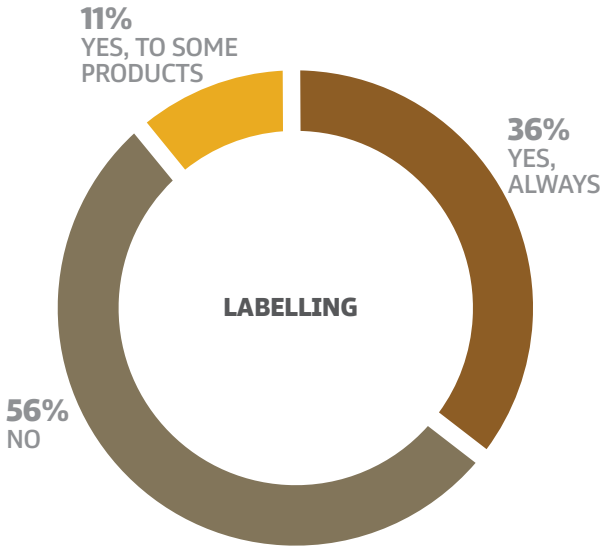


Figure 30: Labelling

More than half of all responding beekeepers did not affix a label to the bottle when selling honey, while 11% affixed a label in some instances (likely when selling outside of their home community). 36% of respondents consistently labelled their product for sale, but the vast majority (93%) had not labelled it with a label approved by the Food & Drug Department of the Ministry of Health.

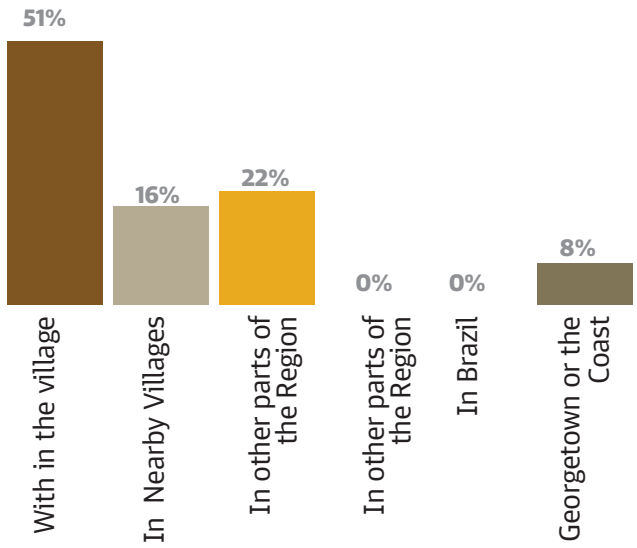


Figure 31 Sales by channel

Beekeepers primarily have the option to access multiple market channels. Of these sales, those within the respondent's home village are the most important market, used 51% of the time, followed by sales in other parts of Region 9 (22%) and in nearby villages (19%). Sales to Georgetown or other coastal markets are deployed in only 8% of instances.

In respondents' home villages, sales are mainly to other villagers (34% of sales events), village shops (22%), and immediate neighbours (22%).

Beekeepers typically do not modify their pricing in different markets; 86% maintain the same price across all markets.

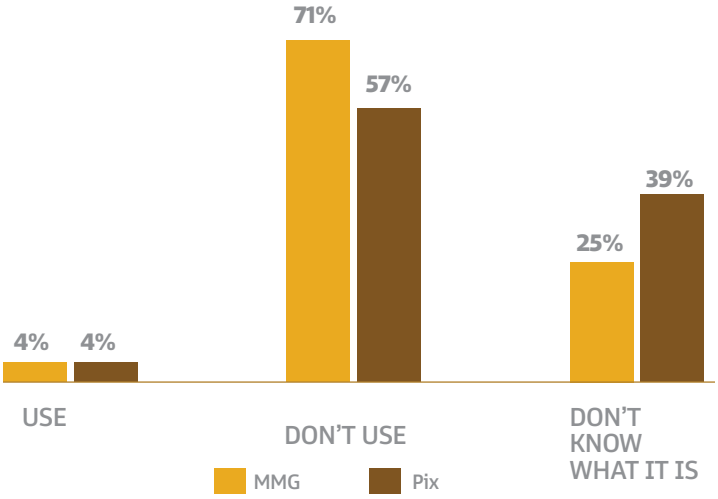


Figure 32: Use of electronic payment systems

MMG[6] and Pix[7] are instant payment systems in Guyana and Brazil respectively. Both facilitate 24/7, instant, low-cost money transfers between registered parties (individuals, businesses etc). 96% of surveyed beekeepers either don't know what about these payment methods, or do not use them.

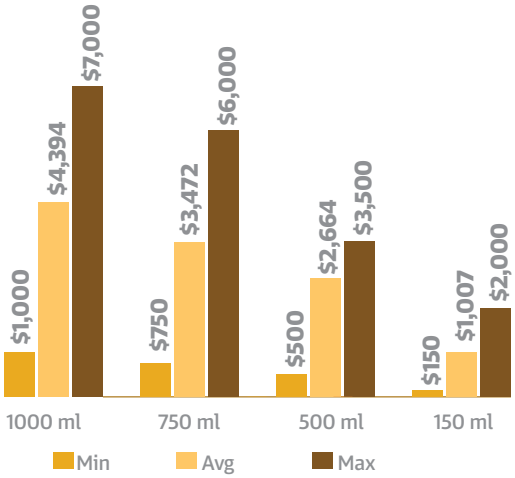


Figure 33: Fair prices for packaged honey by size

We asked beekeepers to identify a fair price to the beekeeper for packaged and labeled honey in various sizes. On average, beekeepers perceive $4,394 as a fair price for 1 liter of honey, $3,472 for 750ml and just over $1000 for a 150ml container of honey.

Slightly more than a half (57%) of beekeepers said they would consider bulk sales of honey (e.g. in large containers – 1 – 5 gallon). When asked about a fair price to the beekeeper for bulk sales of a US-gallon, an average price of $14,388 emerged (minimum $10,000, maximum $18,785). This average bulk price is 13% less than the average price for retail packaged and labelled honey presented previously ($4,394 per liter).

6 https://mmg.gy/
7 https://www.bcb.gov.br/en/financialstability/pix_en

1.4.4 | THREATS

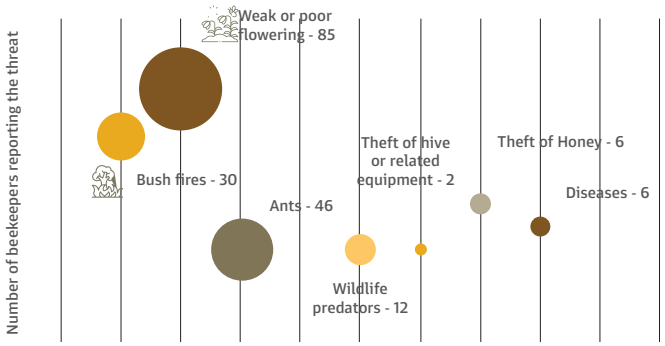


Figure 33: Number of beekeepers reporting the threat to their hives over a 12 month period.

We asked beekeepers about the main threats to their operations, specifically the number of times they had been impacted by each threat in the preceding 12 months. Weak or poor flowering was the most prevalent threat, with 9 beekeepers reporting a total of 85 instances over the past 12 months. 7 beekeepers reported 30 instances of bushfire threats over the past 12 months, and only 2 beekeepers reported 2 threats of theft of hives or related equipment.

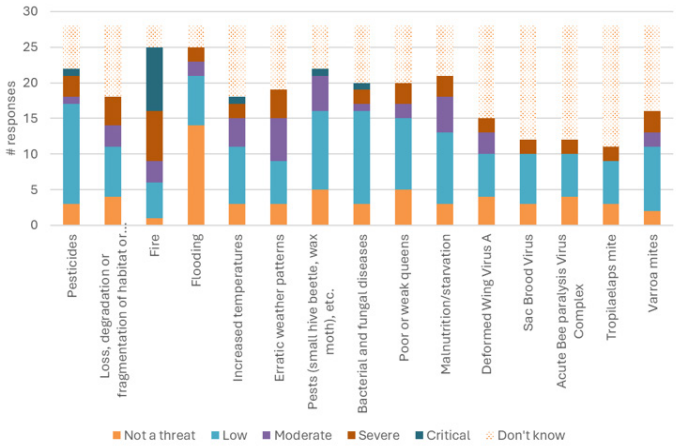


Figure 35 How would you rate these threats to honeybee populations?

Separately, we asked beekeepers to rate threats to honeybee populations. Overall fire is the most significant threat identified, followed by pesticides, malnutrition/ starvation, and erratic weather patterns. Interestingly, as it related to bee pests and diseases (viruses, mites), between approximately 40% and 60% of respondents did not know how to assess these threats.

Just over a third of responding beekeepers (39%) feel confident identifying varroa mites, but overall confidence in identifying pests and diseases impacting bees is low; 14% feel confident identifying Deformed Wing Virus A, and less than 1-in-10 feel confident identifying Sac Brood Virus, Acute Bee paralysis Virus Complex, or Tropilaelaps mites.

4.4.2 | IMPORTED HONEY

Low-cost imported honey, honey mixtures and liquids with properties (appearance, viscosity, taste, etc.) similar to those of honey, are a potential threat to the viability of honey production in the Rupununi and in Guyana more broadly, to the extent that they:

- Redefine what consumers expect of honey in terms of taste, viscosity, appearance, etc.
- Set and potentially lower the price consumers come to expect to pay for honey.
- Take market share from local honey producers.
- Taint locally produced honey to the extent that they are identified as adulterated and are marketed as locally produced honey.

Cross-border imports of honey into the Rupununi pose a high-potential threat to the honey market and to honey producers in the region.

GLDA has indicated that bulk honey imports into the Rupununi via the Lethem Crossing have been restricted, as much of these imports are assumed to be adulterated. In contrast, key informants indicate that the trade in bulk honey, typically transported in 5-gallon pails, continues. One key informant imported 10 pails (50 US-gallons total) in December 2025 and reports typically importing approximately 100 pails (500 gallons) per year.



1.4.5 | TRAINING & KNOWLEDGE



Figure 38 Mr. Yimochi Melville and Mr. Richard Rampersaud inspecting a honeycomb during beekeeping training. © Luke

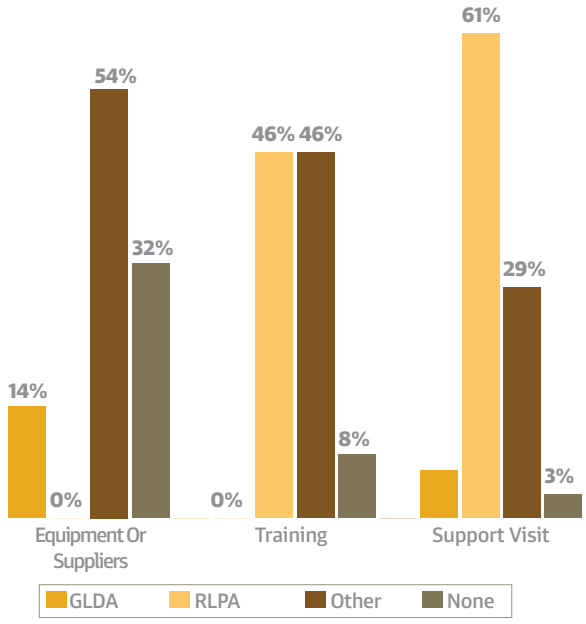


Figure 37: Support from third parties

Responding beekeepers indicated sources of equipment or supplies, training (at least one day), and technical visits to their home or apiary in the 12 months preceding the survey. 14% had received equipment or supplies from GLDA, while 54% had received equipment or supplies from what key informants suggest was the HESAD project (listed in the chart as “other”). HESAD and RLPA have been the main providers of both training and technical support visits.

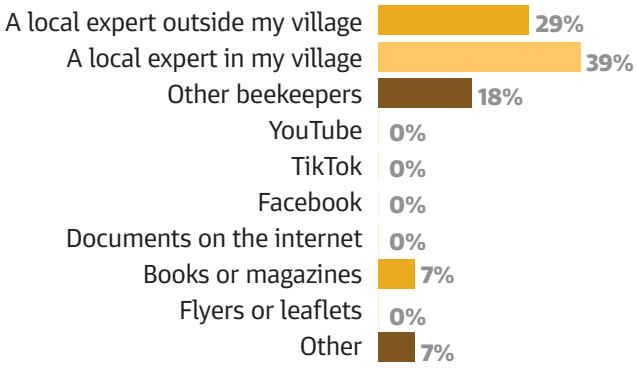


Figure 38 Main sources of knowledge and information

Beekeeping experts, within and outside the respondent's home village (39% and 29% respectively) complement other beekeepers as the main source of beekeeping information.

Asked about other sources of information that they regularly use, social media, predominantly YouTube (14%) and books or magazines (12%) are relevant additional sources. More than a third (39%) of respondents indicated that they are members of a social media group (e.g. WhatsApp) focused on beekeeping.

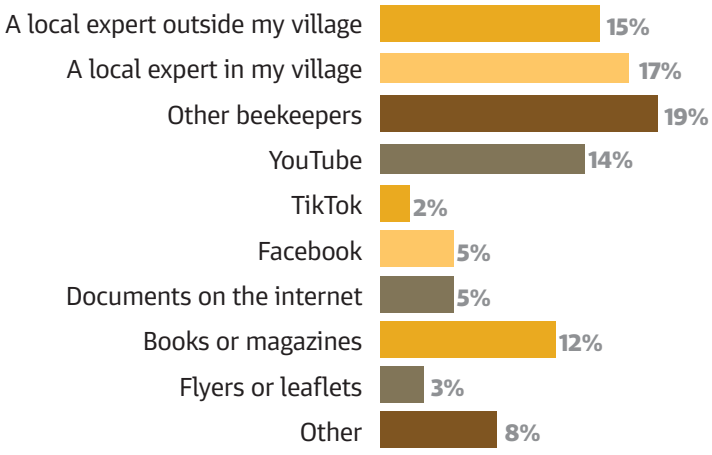


Figure 39 Other common sources of knowledge and information

We explored attendance at training courses or workshops that included sessions relevant to the business side of beekeeping. 61% of responding beekeepers had never attended a course with sessions on financial management or bookkeeping, and 79% had never attended a course or workshop with sessions on business planning, marketing or product development.

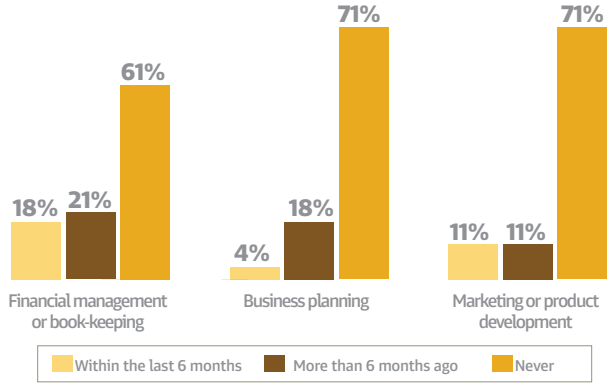


Figure 40 Attendance at training workshops by types of sessions.

4.6 | RECORD KEEPING

43% of responding beekeepers reported keeping a written record of honey production; the majority (57%) did not. The situation deteriorates regarding the recording of financial transactions. 82% of beekeepers did not keep a written record of income and expenditure related to their beekeeping operations, with only 18% keeping records of financial transactions.

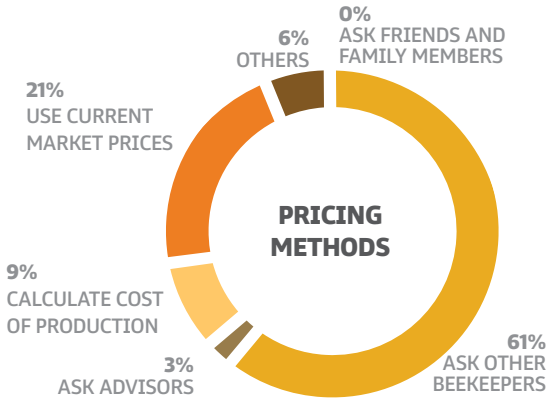


Figure 41 Pricing methods used

When asked about what methods they used to arrive at the price for their bee products (multiple options possible), 61% indicated that relied on information from other beekeepers, 3% asked advisors, and 21% relied on current market prices. Only 9% of responding beekeepers complemented these methods by calculating their cost of production.



1.5| INPUTS

Beekeeping inputs include materials, equipment, services, knowledge, and financial resources needed to start and operate a beekeeping business. These inputs support activities such as acquiring bee colonies, managing apiaries, and post-harvest operations. These activities help improve the production, processing, and marketing of honey and other bee products.

1.5.1 | **PERSONAL EQUIPMENT**

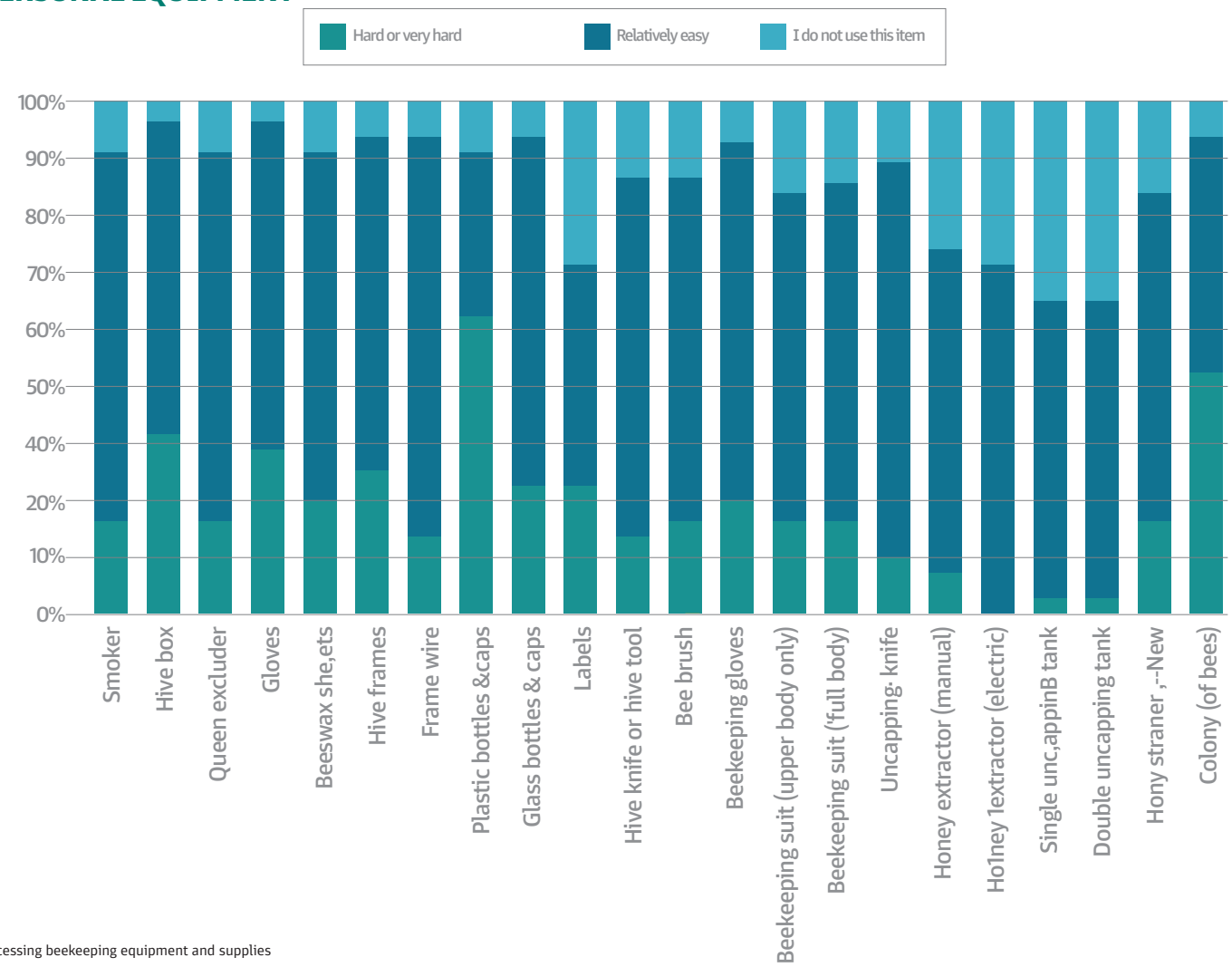


Figure 42 Accessing beekeeping equipment and supplies

Responding beekeepers were asked to indicate how easy it was to source a range of items for their beekeeping business. Plastic bottles and caps (57%), new colonies of bees (46%), hive boxes (36%) and gloves were the most difficult items to source.



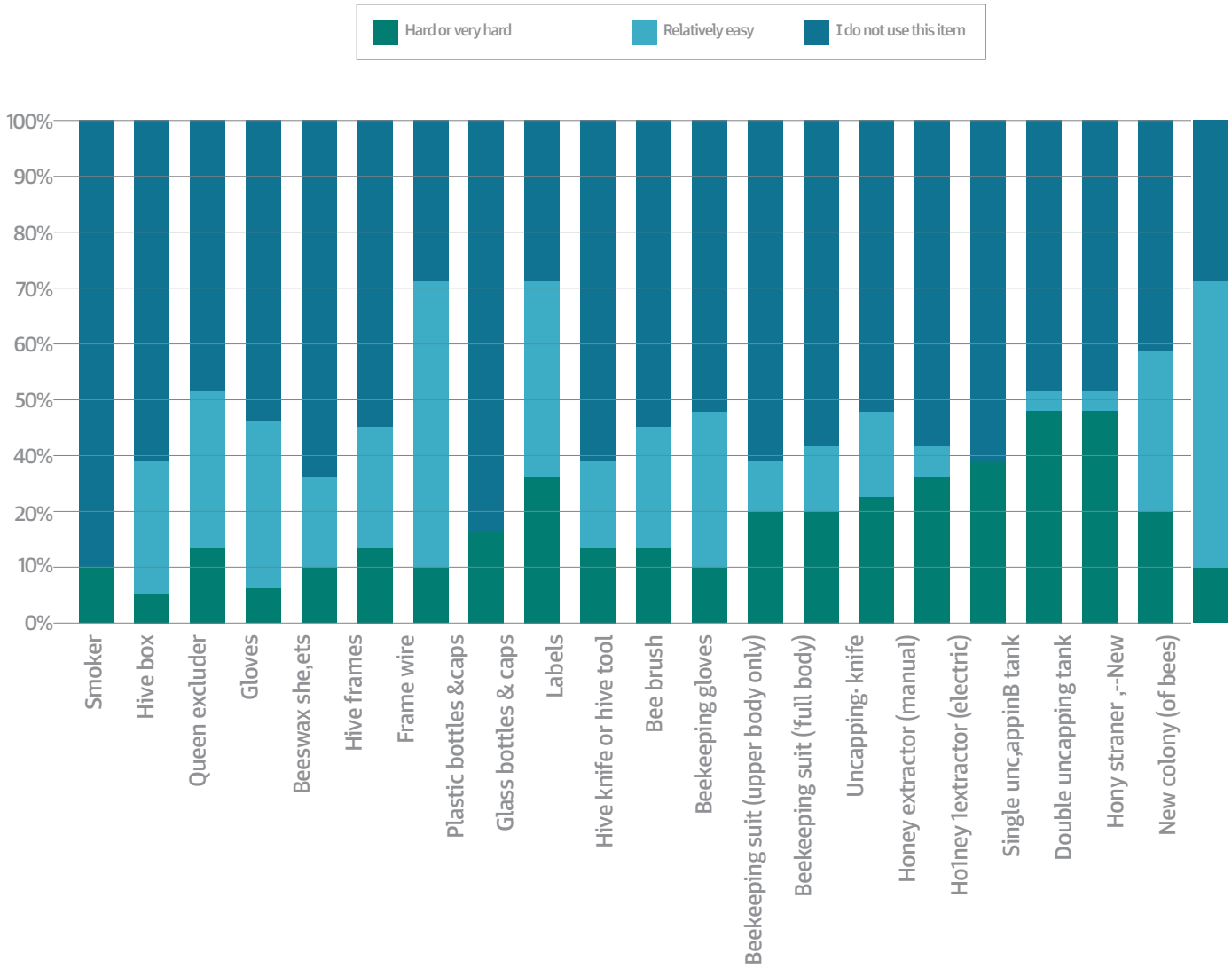


Figure 43 Affordability of beekeeping equipment and supplies

A second series of questions on beekeeping inputs examined relative affordability. Beekeepers for beeswax sheets (71%), frame wire, hive knives, and electric honey extractors (68%) are relatively unaffordable, as are smokers (64%) and manual honey extractors (61%).



1.5.2 | **EQUIPMENT IMPORTS**

Equipment and materials for use in beekeeping imported by or on behalf of a beekeeper are exempt from import duty. National Tariff 2017[8] page 598.

8 https://www.gra.gov.gy/the-national-tariff-2011/



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1.6| ENABLING ENVIRONMENT

In the Rupununi, an enabling environment is essential to strengthening the beekeeping sector. It supports beekeepers by improving knowledge, production, decision-making, stakeholder collaboration, and access to technical assistance. This section reviews the initiatives, partnerships, and service providers that drive the sector's growth and resilience. It also highlights how beekeeper cooperation and conservation awareness contribute to sustainable livelihoods and long-term sector development.

1.6.1 | SUPPORTING INITIATIVES

The Agricultural and Infrastructural Development Programme (AIDP) is aimed at improving the productivity of crop and livestock production systems and value chains, including honey, coconut waste, peanut, coffee and cocoa, and swine. With support the Caribbean Development Fund (CDF, US$15M, 2025 – 2029), the AIDP intends to benefit 4,300 agripreneurs, including approximately 1,700 women and youth[9] . AIDP will construct new and upgrade existing facilities for the processing of honey. In Region 9, AIDP will establish a honey house and an associated agri-tourism experience at St. Ignatius Stockfarm. Additionally, AIDP will train agripreneurs and extensionists and deliver technical assistance to agri-enterprises and sector associations. At the regulatory level, AIDP will establish a state-of-the-art lab that can test for adulterated honey and honey that may have been contaminated with pesticides.

1.6.2 | COLLABORATION BETWEEN BEEKEEPERS

All responding beekeepers thought that collaboration (working together) was very important (68%) or important 32%) for growing beekeeping in the Rupununi.

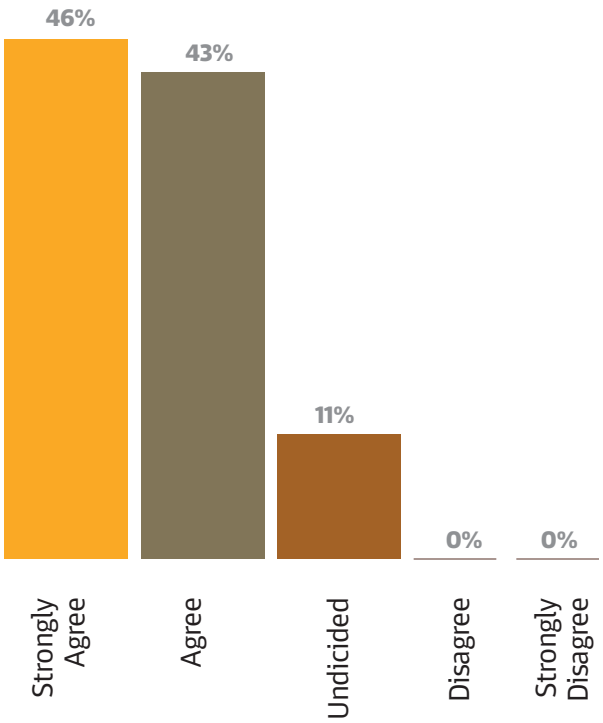


Figure 44 Importance of working together to grow the sector

The majority either strongly agree (46%) or agree (43%) that the more effort they give to collaboration, the more benefits they will ultimately receive.

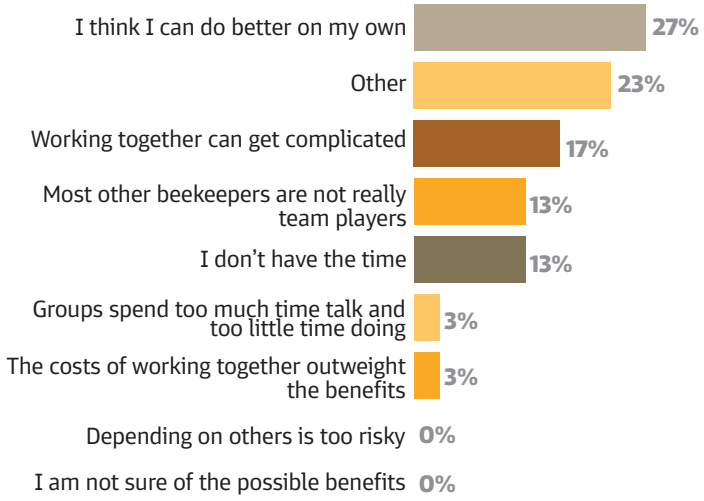


Figure 45 Main reasons you may not be willing to work together (collaborate) with other beekeepers

We asked respondents to choose the main reasons they may not be willing to work together (collaborate) with other beekeepers. 27% indicated that they thought they could do better on their own, while 23% choose a number of reasons including that there was typically no cooperation between beekeepers. 17% thought working together could get complicated. No respondent thought that depending on others was too risky, or that knowledge of the possible benefits of collaborating were barriers.

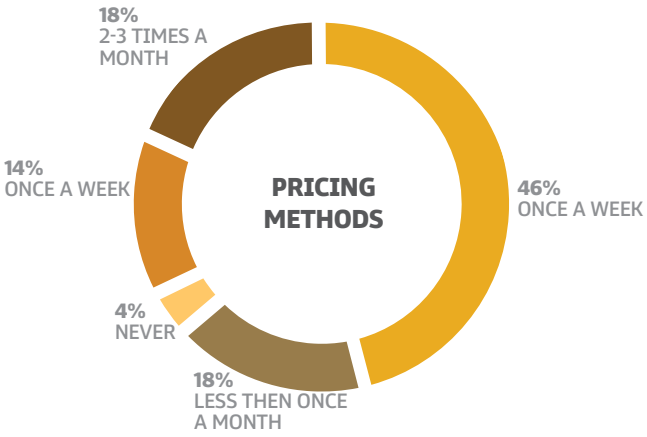


Figure 46 How often do you speak to other beekeepers?

We asked respondents about their relationship with other beekeepers, specifically how often they speak to other beekeepers. 46% said they spoke with other beekeepers about once per month, while 18% spoke with other beekeepers about 2-3 time per month. Only 4% of respondents indicated that they never spoke with other beekeepers.

9 https://caricomdevelopmentfund.org/project/agricultural-and-infrastructural-development-programme-aidp/

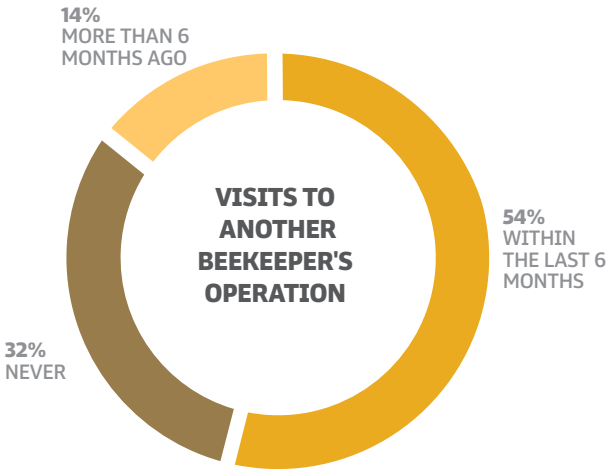


Figure 47 When did you last visit another beekeeper's operation?

Visits to the operations of other beekeepers provides an opportunity for peer-to-peer knowledge sharing. While 54% of respondents had visited another beekeeper within the last 6 months, and 14% had visited more than six months ago, almost a third of beekeepers (32%) had never visited another beekeeper's hives.

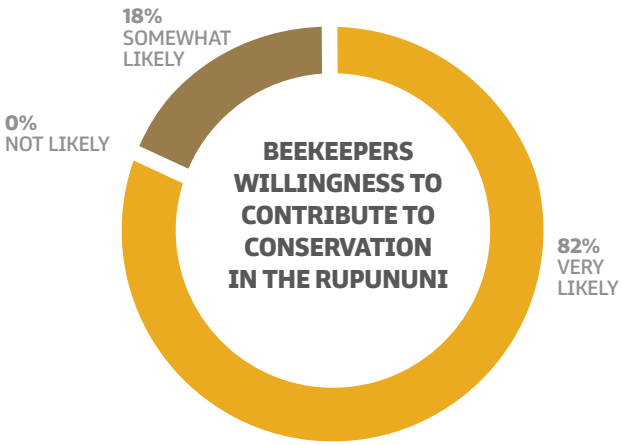


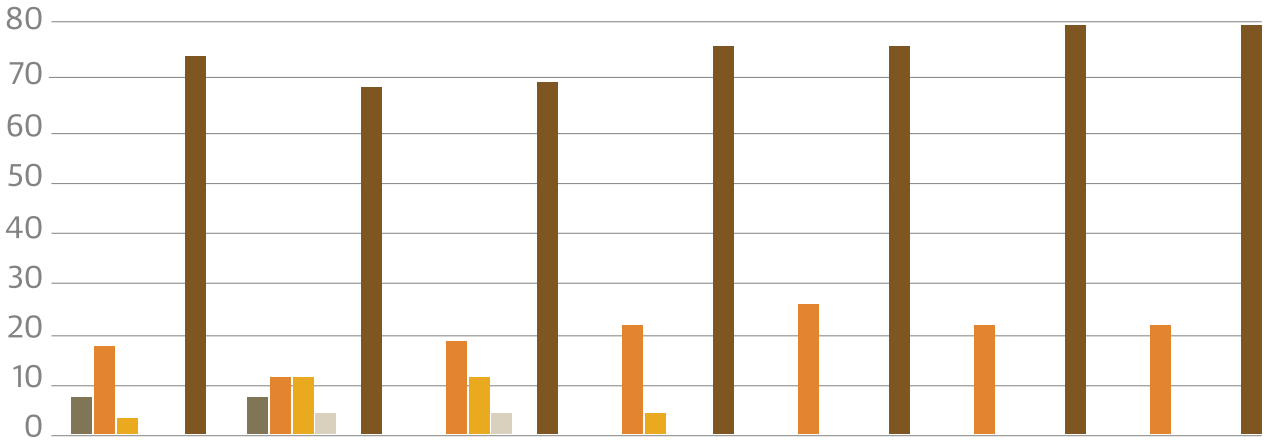
Figure 48: Would you contribute to conservation in the Rupununi?

When asked whether, in the event that their beekeeping business became successful, they would consider contributing to conservation efforts in the Rupununi, 82% indicated that this was very likely, while 18% indicated that it was somewhat likely.

82% of respondents consider the conservation of the Rupununi's forests and savannahs very important, while 18% considered it important.



1.6.3 | SUPPORT SERVICE PROVIDERS



	RLPA	GLDA	NAREI	KMCRG	NRDDB	SRDC	RDC
Moderately Dissatisfied	0	0	0	0	0	0	0
Slightly Dissatisfied	7	7	0	0	0	0	0
Neutral	17	11	18	21	25	21	21
Slightly Satisfied	3	11	11	4	0	0	0
Moderately Satisfied	0	4	4	0	0	0	0
Very Satisfied	0	0	0	0	0	0	0
Never Received Support	73	67	68	75	75	79	79

Figure 49: Rate the support provided by different organizations

We explored beekeepers' perceptions of service providers, in both the technical and governance spaces. Across six organizations, almost three-quarters (74%) of respondents report never having received support from the organization. Most respondents expressed a neutral rating. 3% of respondents were slightly satisfied with RLPA's support, while 11% and 4% were either slightly or moderately satisfied with GLDA's support.





1.7 | CONCLUSIONS

Beekeeping in the Rupununi is in its infancy. The number of beekeepers is likely to be significantly less than 100 persons, in which case, indirect beneficiaries of any intervention will not initially exceed 600 persons. Beekeepers don't directly create employment (only 7% of respondents currently employ someone in their operation), although in many instances, family members of the beekeeper work with bees as well.

Currently, the average beekeeper is three times more likely to be male and four times more likely to be older than 35 years. Only 20% of beekeepers are young (under 35). Our survey of the public (see annex) suggests perceptions of beekeeping are that it is a dangerous occupation, better suited to men than to women (more than two-thirds of our respondents think beekeeping is a man's job).

Rupununi's beekeepers are committed to conserving the region's natural patrimony and are willing to back conservation efforts with a share of their revenue. This presents a good starting point for building out a positive system for sustainable livelihoods.

The sector is advancing largely through resources provided free of cost to new beekeepers by the state (GLDA, MoA-HESAD) or by international donors (New Zealand Aid, WWF-AFD) through organizations like RLPA. Only 14% of responding beekeepers used their savings to start up their operations, and only 17% used savings to expand their operations. Almost three-quarters of the beekeepers we surveyed (72%) indicated that their operation had not expanded. Only 18% of respondents keep a written record of income and expenditure, so expanding with financing from commercial lenders is currently not an option for scaling up.

More than two-thirds of beekeepers have between 1 and 5 active hives. This is well below the number of hives required to generate sufficient income to grow operations from cash flow. Key informants suggest that this threshold is around 20 hives per beekeeper.

Rupununi's beekeepers generally have basic equipment, although harvest and post-harvest equipment seem to be less prevalent. Expanding and repopulating apiaries is largely dependent on capturing wild colonies. Access to and affordability of beekeeping equipment and supplies are barriers to improving production.

Levels of confidence in identifying bee-related pests and diseases are relatively low; just over a third of responding beekeepers (39%) feel confident identifying varroa mites, but overall confidence in identifying pests and diseases impacting bees is low; 14% feel confident identifying Deformed Wing Virus A, and less than 1-in-10 feel confident identifying Sac Brood Virus, Acute Bee paralysis Virus Complex, or Tropilaelaps mites.
The business end of beekeeping in the Rupununi is weak. In addition to poor recordkeeping practices, pricing and positioning skills are underdeveloped. Labelling is ad-hoc and not compliant with local regulations for packaged food.

Imported honey-like substances remain a threat to the viability of beekeeping in the Rupununi. The nature of Guyana's border with Brazil means that this threat will remain, and innovative strategies will be needed to sustain growth for local beekeepers.

1.8| RECOMMENDATIONS

What interventions would be necessary to expand production and sustain any expansion? What are the ecological limits of commercial honey production in the Rupununi? What would a production-focused component of a results chain look like? What would reinforcing loops look like?

These recommendations, as is the case of this assessment report, focuses on the production aspects of beekeeping in Region 9. Marketing related recommendations will be made in the marketing and business model report.

Broaden beekeeping's appeal. Address remaining stereotypical assumptions about beekeeping as a man's domain. Use current women beekeepers as inspiration for the engagement of more women in beekeeping.

Encourage beekeeping among young people, sustaining the sector as the current cohort of (older) beekeepers swarm to greener pastures.

Leverage government's commitment to the sector to expand beekeeping in a collaborative approach. Establish a Region 9 honey working group or multistakeholder platform of key stakeholders (including RLPA, GLDA, NRDDB, KMCRG, SRDC, RDC, GMC, VR, WWF, CI, PAC, commercial banks & lenders) to foster collaboration and information sharing.Collectively develop and agree a theory of change or results chain that sets out the logic underpinning the change stakeholders wish to see. Develop an associated results measurement plan with clear indicators and responsibility for collecting data to measure progress. Develop a dashboard accessible to beekeepers and stakeholders, depicting the change underway in the sector. Consistently collect production- and other relevant information.

Prepare model business plans and proposals for community beekeeping to improve ease of access to financing (LCDS grants etc). Build on the HESAD and NaBee experience.

Drive investment towards beekeepers willing to grow. Coordinate with government and other funders to increase hives per beekeeper to a minimum threshold for business sustainability (we currently assume this to be around 20 hives).

Strengthen beekeeper capacity. Technically with progressive mastery of beekeeping skills, and entrepreneurially with skills and knowledge of enterprise basics (recordkeeping, pricing, product positioning). In the long term, good financial records will be critical for growing beekeeping enterprises.





Support beekeepers to meet basic standards for packaged foods and for improving access to markets, including FDD-compliant labels and barcodes.
Improve access to new colonies & beekeeping inputs.
Invest in queen rearing and in creating a market for nucleus colonies.

Equip beekeeping groups with transportation (ATVs or pick-up trucks) to reduce the cost and effort of capturing wild colonies.

Stock the RLPA hub with affordable beekeeping equipment and supplies. Initially accept that this may need to be imported equipment (there are multiple reputable manufacturers and suppliers in neighbouring Brazil) in order to minimize costs to new and existing beekeepers and to encourage scale up. Later the focus can shift to seeding local manufacturing when economies of scale from a larger number of beekeepers make lower costs possible.

Establish positive reinforcing loops between beekeeping and conservation.

Encourage conservation-compatible beekeeping as a livelihood strategy in and near protected areas and community-conservation area, and as a basis for future marketing measures.

Develop and agree standards for Rupununi honey, and for conservation honey (honey extracted in protected areas and community-conservation areas).

Research the impact of africanized bees on other bees & pollinators in the Rupununi ecosystem and generate recommendations for maximizing the diversity and value of endemic bee species.

Insulate Rupununi honey from honey-like substances.
Establish systems and standards for quality assurance, with a particular focus on honey extraction as a critical control point. Consider mobile honey houses, peer-to-peer quality assurance systems, and other measure that improve traceability and reduce the possibility of contaminating the Rupununi honey value chain with honey-like substances.

Establish certification for both honey gathered in the Rupununi, and for conservation-friendly honey gathered from within protected areas or community-conservation areas.



SECTION 2

HONEY MARKET ASSESSMENT



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2.1| BACKGROUND

SCOPE OF THE ASSESSMENT

This assessment is the first of two components of research initiated by the Rupununi Livestock Producers Association (RLPA) into the honey sector in the Rupununi. While this report focuses on the market for honey, the second component examines honey production in the Rupununi.

The market assessment is intended to:

- Consider local, national, export levels of honey.
- Identify and recommend market linkages to strengthen the honey value chain.
- Provide actionable recommendations for marketing and positioning Rupununi honey.

The market assessment is skewed towards generating insights that benefit Rupununi beekeepers and the advancement of beekeeping in the Rupununi. National and international data and insights are considered from this perspective.

2.1.1| THE RUPUNUNI

Georgetown (approximate population 235,017) and Boa Vista (approximate population 413,486) stand at either end of a corridor of smaller towns and settlements, including Bonfim Lethem[10] and Linden.

Boa Vista is the capital of Roraima State in Brazil. Roraima, one of 26 states in Brazil, covers an area of approximately 223,644.527 square kilometres (86,300 sq. mi) and has an estimated population of 631,181 as of 2020. It borders both Regions 8 & 9 in Guyana's hinterland, and some of Region 7, although no regular crossings exist outside of Lethem.

With a Gross Domestic Product (GDP) of R$13,37 billion (US$2.35B), the economy of the state of Roraima is the smallest in Brazil, accounting for only 0.2% of that country's economy. It is based on agricultural production, mainly in the grain agribusiness, with an emphasis on rice, soybeans, and corn. Embrapa, Brazil's agricultural research agency, has confirmed Roraima's suitability for soybean and corn cultivation, with the potential to produce higher-quality soybeans than in other states. Roraima's climate allows for two soybean

10 The 2022 Census has pegged the Lethem population at 3,893.



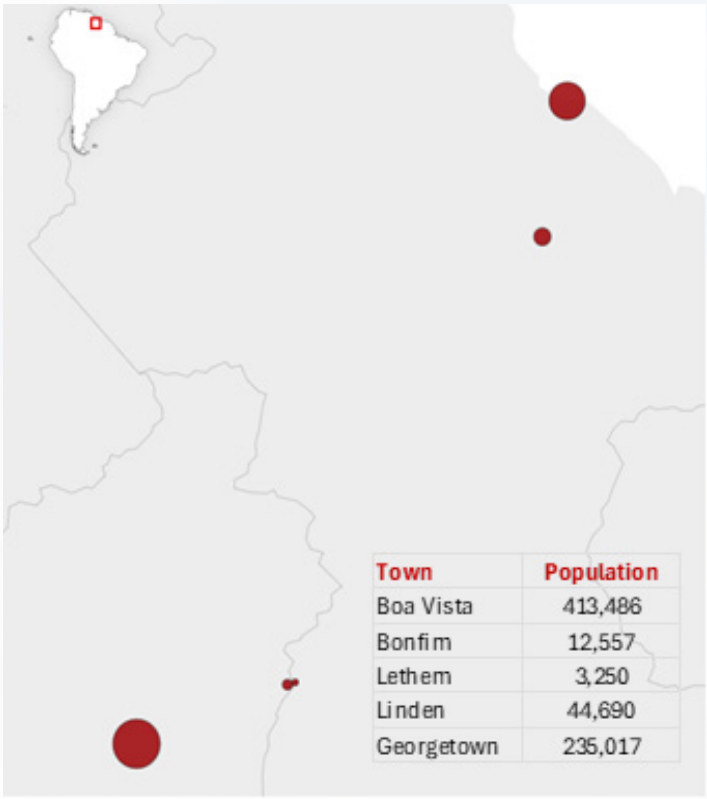


Figure 1: Map showing the population of towns and settlements

harvests annually, a distinct advantage over states where only one harvest is possible. The state has a significant beef production industry, particularly in the savannah region surrounding Boa Vista.

A paved road link connects Boa Vista with Lethem in Guyana (133km, ~95 minutes), and 121 kilometres of road is currently under construction between Linden and Mabura in Guyana. A further 421 km of road is necessary to complete the Guyana – Brazil Land Transport Link (and Deep-Water Port) [11] , which has been studied for some time. If realized, studies suggest it would bring Roraima State a similar total transport cost but a substantial time advantage as compared to the Amazon route currently used for imports and exports. The corridor may also lead to increased opportunities for Guyanese businesses, but improved access for Brazilian companies to the Guyanese market, particularly given the various benefits for exporting firms currently available in Roraima and Manaus, might exert substantial pressure on, or even crowd out, local businesses in Guyana.

11 https://finance.gov.gy/wp-content/uploads/2017/06/pic__guyana_-_brazil_land_transport_link_and_deep_water_port_2-1.pdf



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Current overland (truck) freight rates between Georgetown and Lethem are in the range of G$25-$60 per lb., and air freight from Lethem to Georgetown is G$200 per lb.

A partial scope agreement between Guyana and Brazil was signed in 2001 and came into force in 2004. The primary aim of the agreement is to increase trade flows between Guyana and Brazil.

This is to be achieved by both parties offering tariff preferences on products traded between them once they satisfy the rules of origin provisions. However, as the agreement has a limited scope, only the listed products receive duty concessions in the markets of the signatory countries. [12] Key informants in Lethem suggest the current cross-border trade is lopsided in favour of Brazilian exports to Guyana.

A "Defined Area" (as opposed to a tax-free zone) has been delineated by the GRA, and comprises Regions 9 and 8, up to the West Bank of the Essequibo River at Kurupakari. With limited exceptions, goods imported through Lethem for sale, consumption, and use within the defined area are not subject to VAT and import duties[13].Additionally, goods imported from Brazil via Lethem and destined for the coast of Guyana benefit from a 40% reduction in value for the purpose of calculation of import duties and taxes.

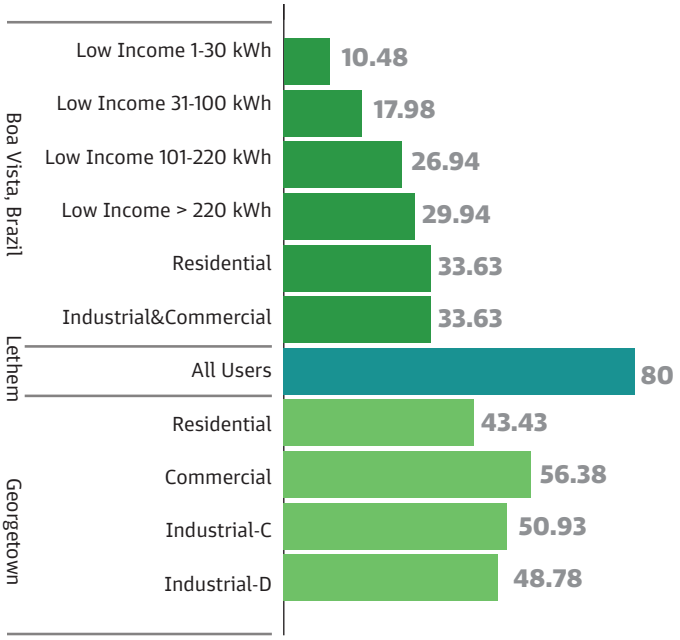


Figure 2: Electricity costs per kWh. April 2025. Source: GPL, LPC, Roraima Energia.

Electricity rates are highest in Lethem (more than twice the kWh rate in Boa Vista), and supply is limited to Lethem and nearby villages. Rates in Georgetown are about 1/3 higher than in Boa Vista but are expected to reduce significantly when the government's pipeline energy projects come on stream. There is no public electricity grid in the rural hinterland areas of Guyana. The quality and availability of the internet in the Rupununi are rapidly improving, mostly due to affordable Starlink systems.

Cash is the dominant method of payment in the Rupununi. ATMs are limited to Lethem, and options for using credit and debit cards beyond Lethem are limited. The Rupununi's population grew from 24,238 persons in 2012 to 29,944 persons in 2022. The population density remains the lowest in the country at 0.52 persons per square kilometre. The average household size has decreased from 4.95 persons per household in 2012 to 4.33 in 2022.

While there is no dedicated data on the number of tourists visiting the Rupununi, 453,489 tourists visited Guyana in 2025, up 22% on 2024, and more than 550,000 visitors are projected to arrive in 2026 . The Rupununi is undoubtedly the centre of nature- and culture-based tourism in Guyana. Comparatively high prices have held visitor numbers relatively low. Visitors are usually birders, wildlife photographers, researchers, eco-tourists, adventure travellers, and increasingly domestic Guyanese tourists.

The Kanuku Mountains Protected Area (KMPA) sits within the Upper Takutu-Upper Essequibo (Region 9) in the heart of the Rupununi savannahs in southwestern Guyana. Approximately 611,000 hectares (6,110 km^2) in size, it occupies roughly 2.8 % of Guyana's land area. KMPA was designated a National Protected Area in 2011 under Guyana's Protected Areas Act and is an IUCN Category VI (Managed Resource) Protected Area, allowing for the sustainable use of natural resources alongside conservation. The KMPA sits at the interface of diverse ecosystems — mixed forest, gallery forest, savannah edges and riverine vegetation — each hosting many flowering plants that can provide nectar and pollen for honeybees.

The Iwokrama Forest is a 371,000-hectare (3,710 km^2) tract of intact tropical rainforest in central Guyana. Established as an international experiment in the 1990s to generate income without destroying the forest, the Iwokrama International Centre for Rainforest Conservation and Development works closely with Region 9 communities (although the forest technically sits outside the Rupununi in Region 8).

12 https://guyanainvest.gov.gy/wp-content/uploads/2020/12/Summary-and-Status-update-of-Guyanas-Trade-and-Investment-Agreements.pdf

13 https://www.gra.gov.gy/policy-on-goods-imported-into-guyana-through-lethem-brazil-english-version/



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2.2| MARKETS
END-PRODUCT MARKETS

End-product markets are essential for assessing the commercial potential of honey and related products. They determine sales locations, packaging standards, and realistic pricing for beekeepers. This section reviews current market conditions nationally, in the Rupununi, and in Roraima, Brazil. It also identifies trends in packaging, labelling, sales channels, production volumes, and pricing that affect market growth opportunities.

2.2.1 | **NATIONAL MARKETS**

There is limited publicly available data on the size of Guyana's honey market. At the 2025 GLDA Honey Fest, the Minister of Agriculture indicated that the number of registered beekeepers (across the country) had increased by 33% from 160 to 213 within the preceding 12 months. Further, the Minister indicated that "...honey production had increased from 2,128 gallons (about 8054 litres or 11,539 kgs) in 2023 to 27,601 gallons (about 104,470 litres or 149,670 kgs) at the end of 2024, and in 2025, is projected to surpass 30,000 gallons (113,550 litres, 162,680 kgs)." Further "...The industry is actively transitioning from individual hives to standardised commercial operations. By expanding honey production to over 5,000 hives, Guyana aims to achieve self-sufficiency and become a regional honey exporter by 2030."

2.2.2 | **RUPUNUNI MARKETS**

The 2025/2026 RLPA Honey Production Assessment, which gathered data from 35 beekeepers in the Rupununi, provides market-relevant information. 82% of survey respondents report that they consistently use the same type of packaging to sell their honey.

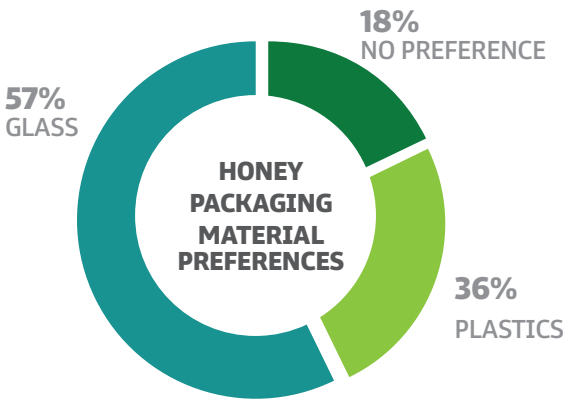


Figure 3: Packaging honey - material preferences

The data indicate that 57% of responding beekeepers prefer glass packaging for their honey, 25% prefer plastic, and 18% have no preference.

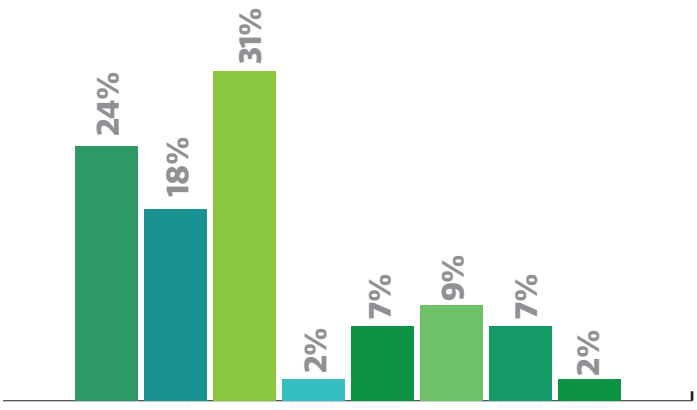


Figure 4: Packaging honey - preferred sizes

Beekeepers perceive 500ml (1/2 litre) as the most popular size, followed by 1-litre and 750ml.

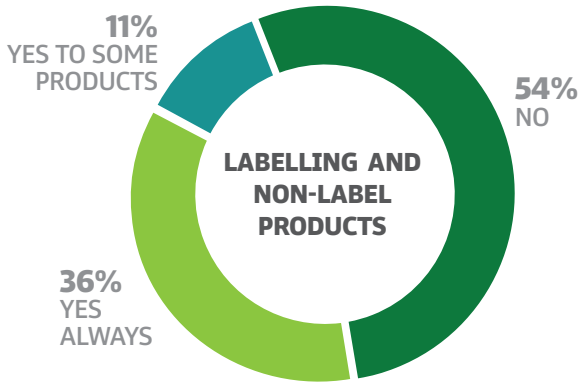


Figure 5: showing Labelling and non-label products.

More than half of all responding beekeepers did not affix a label to the bottle when selling honey, while 11% affixed a label in some instances (likely when selling outside of their home community). 36% of respondents consistently labelled their product for sale, but the vast majority (93%) had not labelled their product with a label approved by the Food & Drug Department of the Ministry of Health.

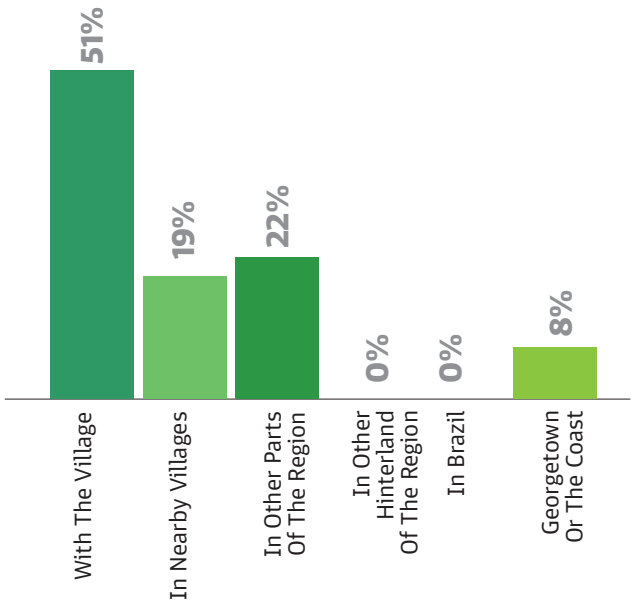


Figure 6: Sales by channel

Beekeepers primarily have the option to access multiple market channels. Of these options, sales within the respondent's home village are the most important market, used 51% of the time, followed by sales in other parts of Region 9 (22%) and in nearby villages (19%). Sales to Georgetown or other coastal markets are deployed in only 8% of instances.

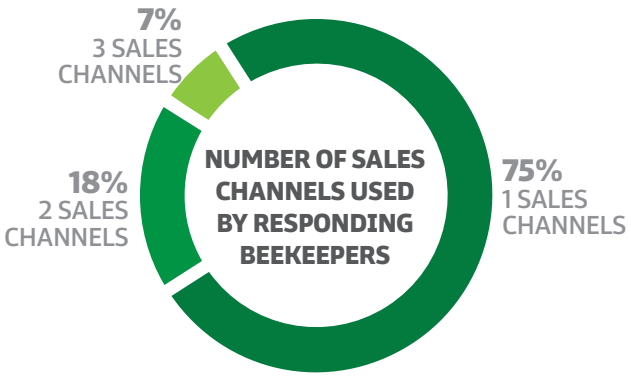


Figure 7: Number of sales channels used by responding beekeepers

Within the respondents' home village, sales are predominantly to other villagers (34% of sales events), village shops (22%) and immediate neighbours (22%).

75% of beekeepers use one channel to sell their honey, typically within the village. Only 7% of beekeepers surveyed have developed 3 sales channels. Beekeepers typically do not adjust their prices across markets; 86% maintain the same price across all markets. We asked beekeepers to identify a fair price to the beekeeper for packaged and labelled honey in various sizes. On average, beekeepers perceive $4,394 as a fair price for 1 litre of honey, $3,472 for 750ml, and just over $ 1,000 for a 150ml container of honey.

Slightly more than half (57%) of beekeepers said they would consider bulk sales of honey (e.g., in large containers – 1 – 5 gallons). When asked about a fair price for the beekeeper for bulk sales of a US gallon, an average price of $14,388 emerged (minimum $10,000, maximum $18,785). This average bulk price is 13% less than the average price for retail packaged and labelled honey presented previously ($4,394 per litre).



Figure 8: The Rupununi's own Mabadap honey on sale at the KMCRG Christmas Fair 2025. $6000 per liter.

In 2025, with harvesting still underway at the time data for this assessment was being collected, 22 responding beekeepers reported production (year-to-date) at a total of 553 liters but with one beekeeper accounting for 21% of this production. Discarding this outlier, average production currently lies at approximately 21 litres per beekeeper.

In 2024, total reported production stood at 983 litres, with one beekeeper accounting for 41% of all production, and two beekeepers together accounting for 75% of all reported production. Without these outliers, the average beekeeper produced 16 litres of honey in 2024. No beekeeper reported producing byproducts (Bee pollen, beeswax, propolis or royal jelly) for sale in 2025.

2.2.3 BRAZILIAN MARKET: RORAIMA STATE

Brazil's honey production reached 67.3 million kilograms in 2024, the highest value ever recorded, with the northeastern states accounting for 39.4% of the total.[14] Production in neighbouring Roraima state (where Boa Vista is located) accounted for 0.13% of total national production in 2024 (equivalent to 85,692 kg). Amazonas state (where Manaus is located) accounted for 0.10% of the national total in the same year (67,267 kg).

Roraima state's honey production fell sharply in 2024 after peaking at 165,000 kgs in 2023, a decline of 79,308 kgs or almost 50%. Production is concentrated in the Boa Vista micro-region (specifically the municipalities of Boa Vista and Cantá), which accounted for 58% of production in 2024 and 76% of production in 2023. Production begins in August and ends in April, before the rainy season begins[15].

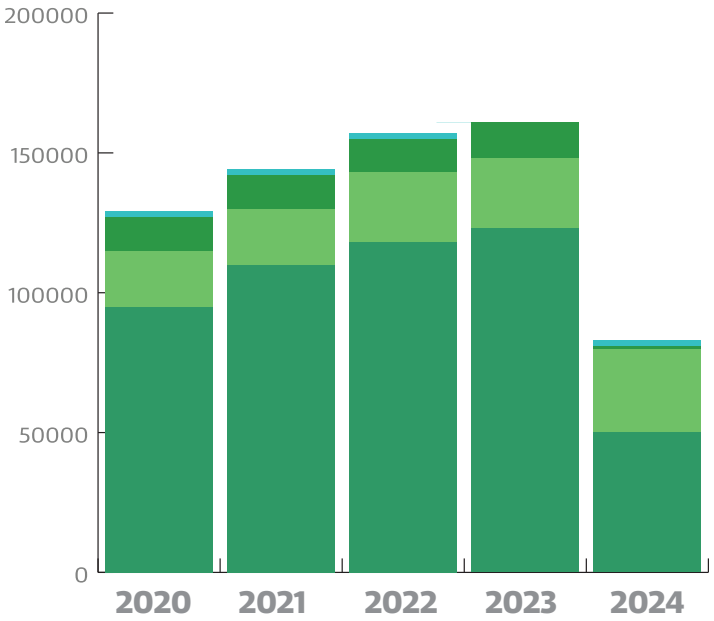


Figure 9: Production of honey in Roraima state, Brazil and its

14 https://agenciadenoticias.ibge.gov.br/en/agencia-news/2184-news-agency/news/44539-valor-da-producao-da-pecuaria-e-da-aquicultura-chega-a-r-132-8-bilhoes-em-2024-com-recorde-nas-producoes-de-leite-ovos-de-galinha-e-mel-2

15 https://www.folhabv.com.br/cotidiano/acoes-do-governo-de-roraima-fortalecem-apicultura-e-melhoram-qualidade-do-mel-produzido-no-estado/?utm_source=chatgpt.com



Figure 10: Honey Products with State Inspection Seal (Selode Inspeção Estadual – SIE) from the Agência de Defesa Agropecuária do Estado de Roraima (ADERR) © Timothy McIntosh.

micro-regions. 2020 - 2024.

Currently, the Associação Setentrional dos Apicultores de Roraima (ASA) – the Northern Association of Beekeepers of Roraima - and the cooperative Roraimel are responsible for processing honey from affiliated beekeepers, and the products receive the State Inspection Seal (Selode Inspeção Estadual – SIE) from the Agência de Defesa Agropecuária do Estado de Roraima (ADERR) – the Roraima Agricultural Defence Agency, an agency of the state of Roraima. However, it has been estimated that 37% of beekeepers in Roraima process and sell honey illegally, a practice that persists due to insufficient enforcement and the distance to legally approved honey processing facilities (Edymeiko de Souza Maciel, 2025).



Figure 11: Uncertified honey for sale in a Bomfim store. $R30.50 per liter, approximately G$1280 per liter. December 2025

In addition to production challenges, honey consumption in the state is also limited. An assessment of the population's perception regarding honey consumption revealed that 52% rarely or never consumed honey, possibly because honey is commonly associated with medicinal uses – especially for respiratory problems – rather than as a regular food item (Edymeiko de Souza Maciel, 2025). Unlabelled bottled honey is available in Bomfim (directly adjacent to Lethem) and Boa Vista (1.5 hours from Lethem) at retail prices around R$40 per litre (~G$1680 per litre). Bottled honey from the Roraimel coop, certified by the state inspectorate, retails in Boa Vista supermarkets for R$19,29 (~G$810) for 470 grams (about 0.33 litres), which equates to approximately G$2450 per litre.



Figure 12: : Retail prices for a range of honey products in Brazil, some available nationally (via Amazon.br), or locally in Roraima state. Converted to G$ per litre at R$1: G$42.



©Luke McKenna

2.3| PRODUCT ATTRIBUTES & POSITIONING OF RUPUNUNI HONEY

Product attributes and positioning are key to differentiating Rupununi honey in local, regional, and international markets. This section examines how origin, purity, packaging, conservation value, and storytelling enhance the product's identity and appeal. It also discusses positioning Rupununi honey as a unique, high-value product associated with biodiversity conservation and sustainable community livelihoods.

The average package size was just below 350ml (equivalent), with six of eight products at or below this size.



Figure 12: Showing honey products that are associated with a protected area.

2.3.2| ATTRIBUTES

All of the products we categorised as “conservation honey” were packaged in glass jars. Labelling is largely pictorial and connects the product to its origin (100% of the products). In some cases, labelling is minimal. Outside of claims to be organic, pure, or unfiltered (38% each), claims of special properties are minimal.

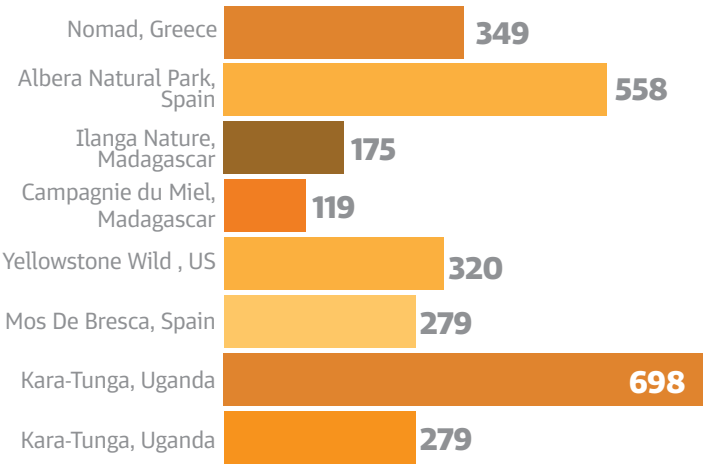


Figure 12: Package size (converted to millilitres) for a range of “conservation honey” products.

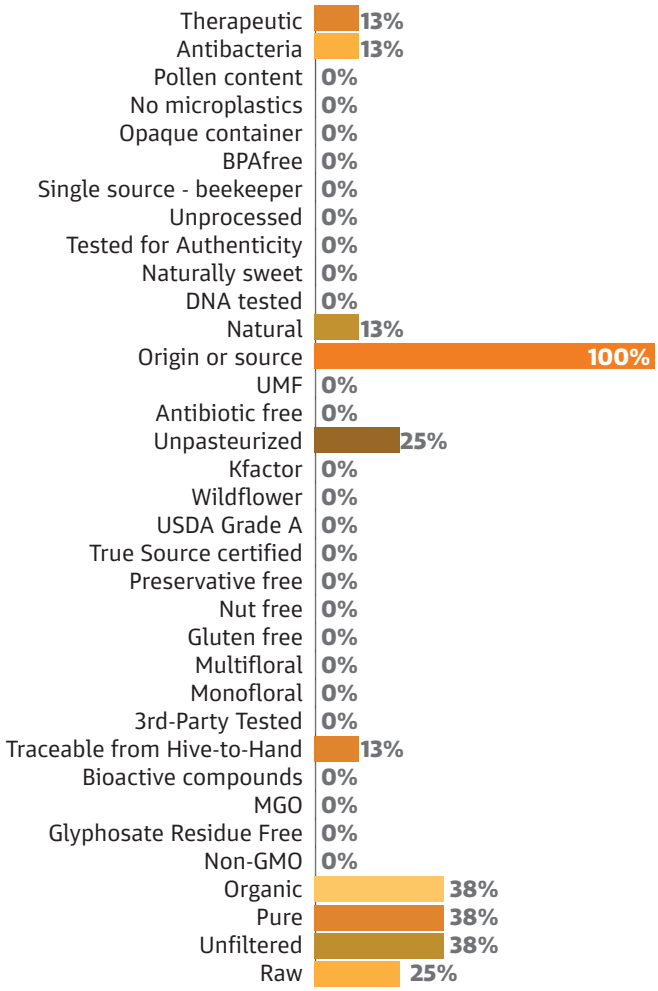


Figure 12: Package size (converted to millilitres) for a range of “conservation honey” products.



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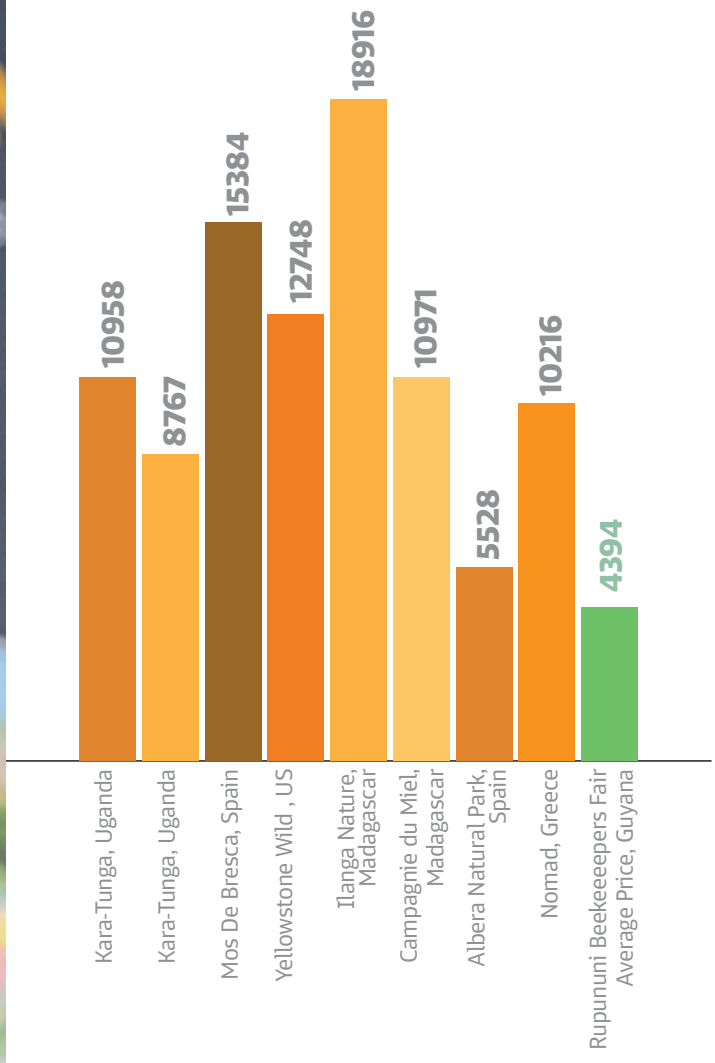


Figure 17: Equivalent prices (G$ per litre) for various honey products associated with a conservation area. Rupununi Beekeepers Fair average price (G$ per Liter) provided for comparison

Eight (8) conservation honey products commanded an average equivalent retail price of G$11,686 per litre, with a maximum of almost $19,000 per litre. The average price of this sample of 8 conservation honey products is 2.6 times the average “fair” price ($4,394 per litre) determined during a survey of 35 Rupununi beekeepers for the RLPA Honey Production Assessment.

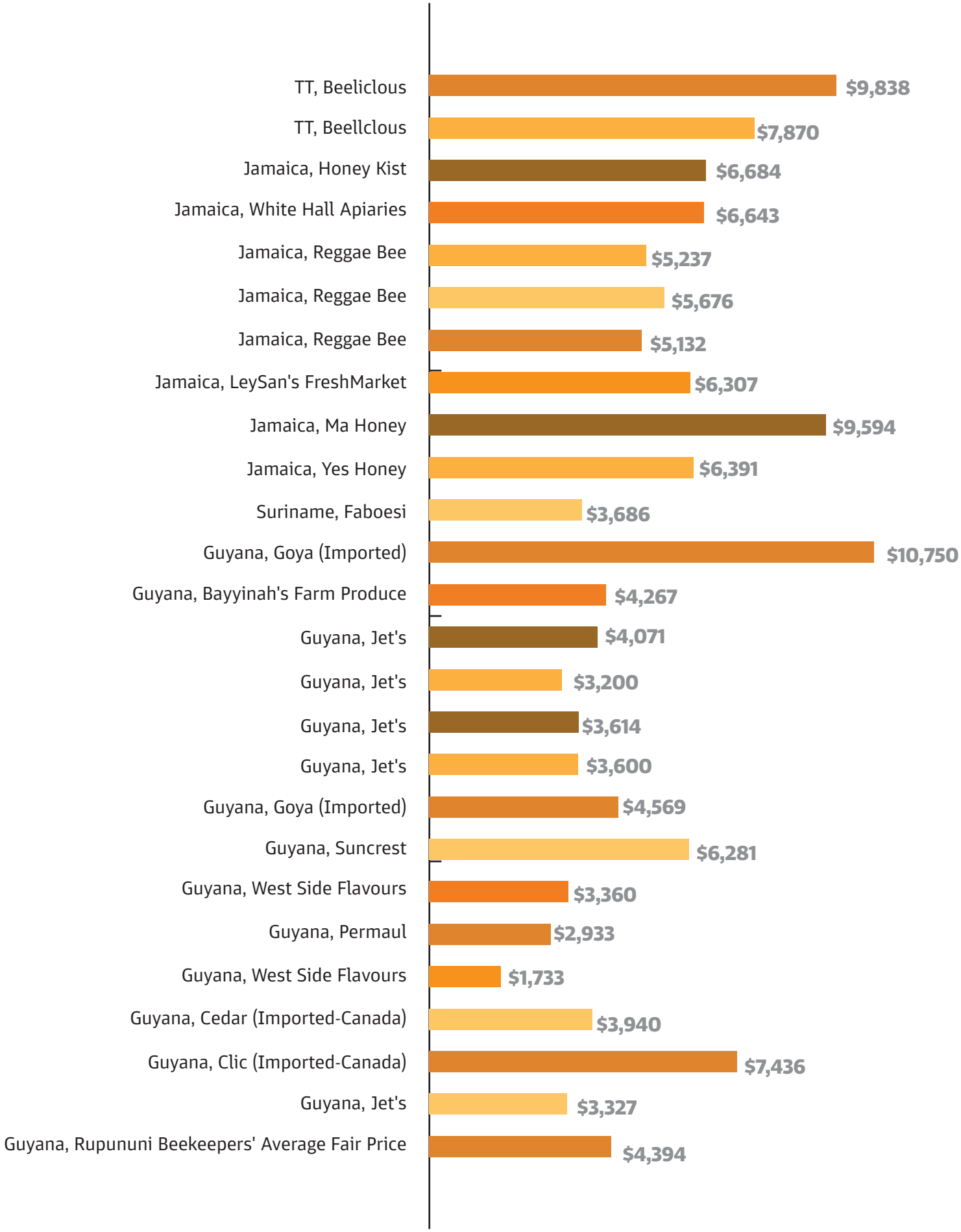


Figure 18: Prices of honey products in Guyana and the Caribbean. Local products and imports (noted separately). Prices are converted to their litre equivalent (G$ per Litre)

2.3.3| POTENTIAL MARKETS

GUYANA & THE CARIBBEAN MARKETS

In Georgetown supermarkets, the average price per litre equivalent of honey across fourteen (14) local and imported products is approximately $4500 per litre. Across ten (10) local products, this drops to the equivalent of $3,639 per litre. In Jamaica, the average per-litre equivalent is $6,458 across 8 products and $8,854 across 2 products.

Plastic packaging dominates across the sample of 35 products sold in the Caribbean. Narrow-mouth bottles account for almost three-quarters of the products, with jars only present in 12% of the products, and squeeze bottles used in 12% of the products.

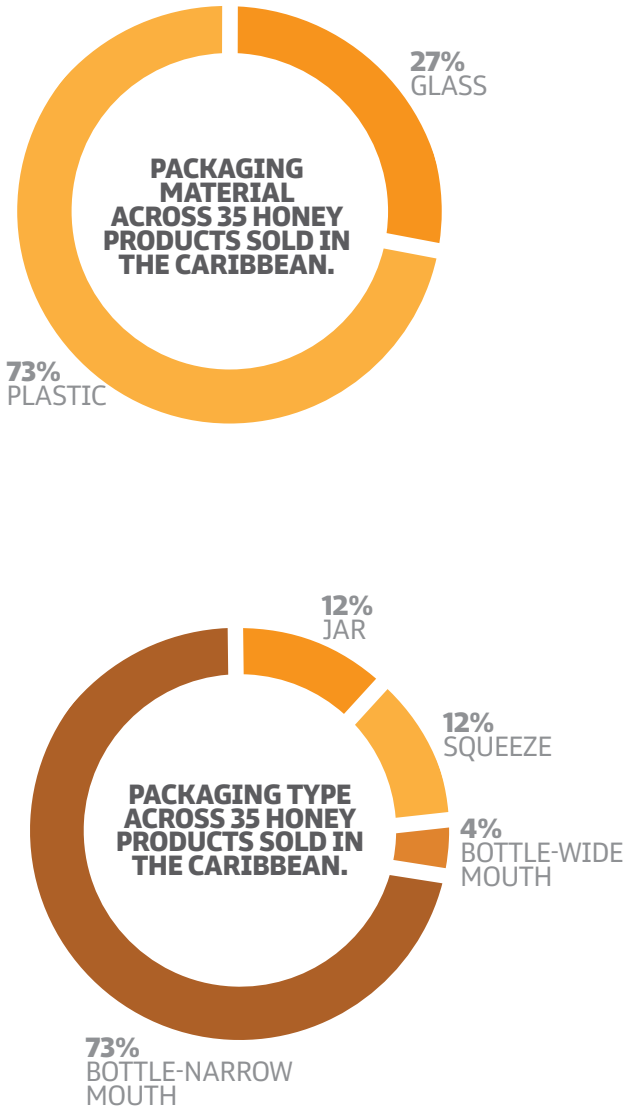


Figure 19: Packaging material and type across 35 honey products sold in the Caribbean.

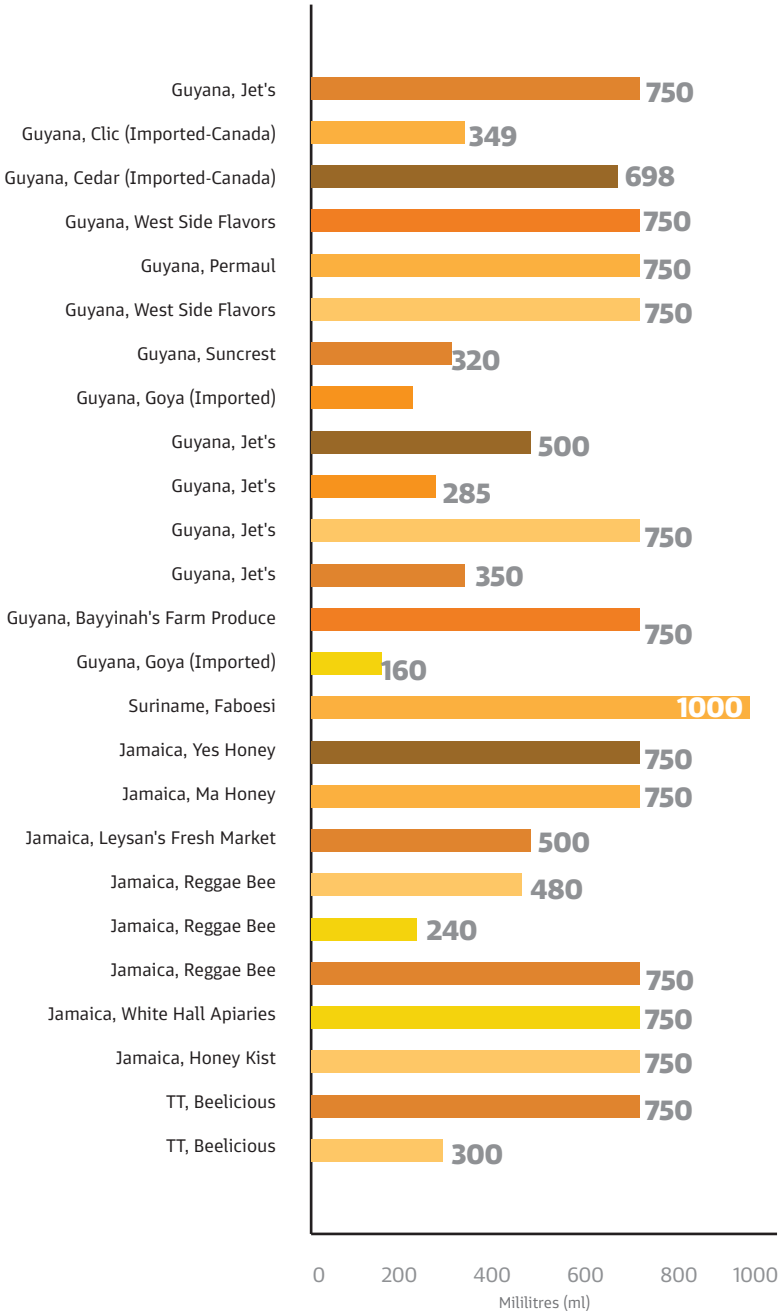


Figure 20: Comparison of Honey Product Volumes by Brand and Country (Guyana, Suriname, Jamaica, Trinidad & Tobago)
X-axis: Volume (milliliters, ml)
Y-axis: Honey brands categorized by country.

2.3.4| **AMAZON – US**

We analysed the top 10 best sellers in the Honey category on Amazon.com to gain insights into the US market for honey. 100% of packaging is plastic, and 50% of the packages are squeeze bottles. None uses narrow-mouth bottles.

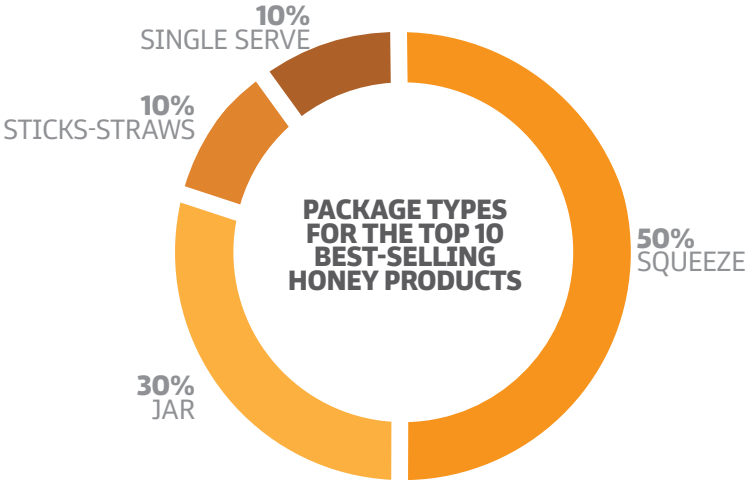


Figure 21: Package types for the top 10 best-selling honey products on Amazon.com

The average litre equivalent price is G$10,461, buoyed by Manuka honey products (3rd, 9th, 10th in the best seller ranking

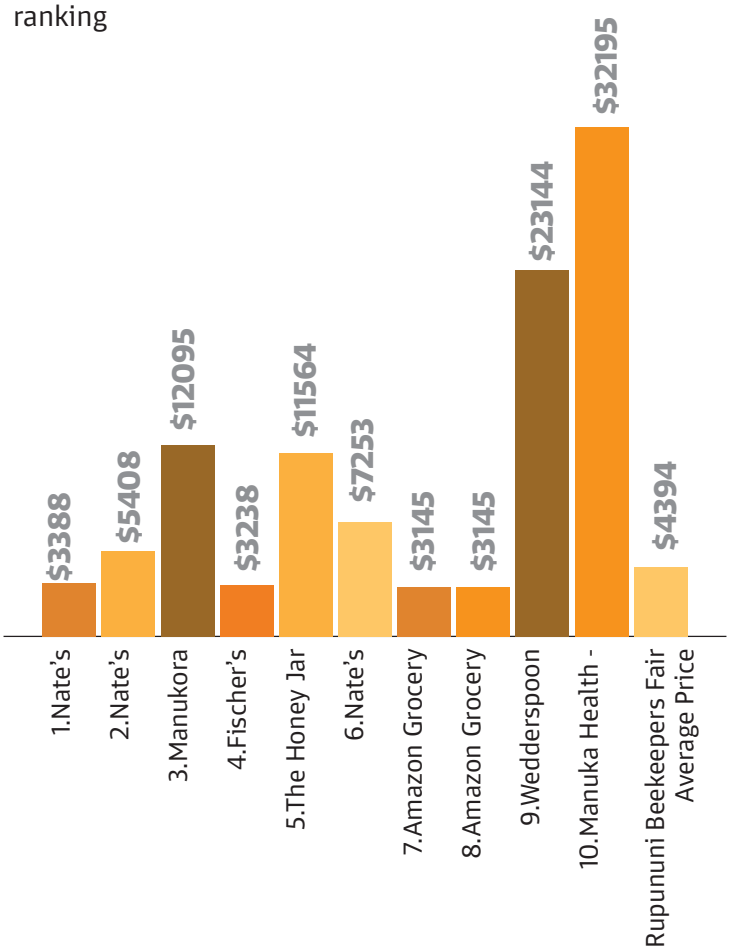


Figure 22: Comparing Honey Prices by Brand and Supplier with Rupununi Beekeepers Fair Average Price



©Manuka Hut

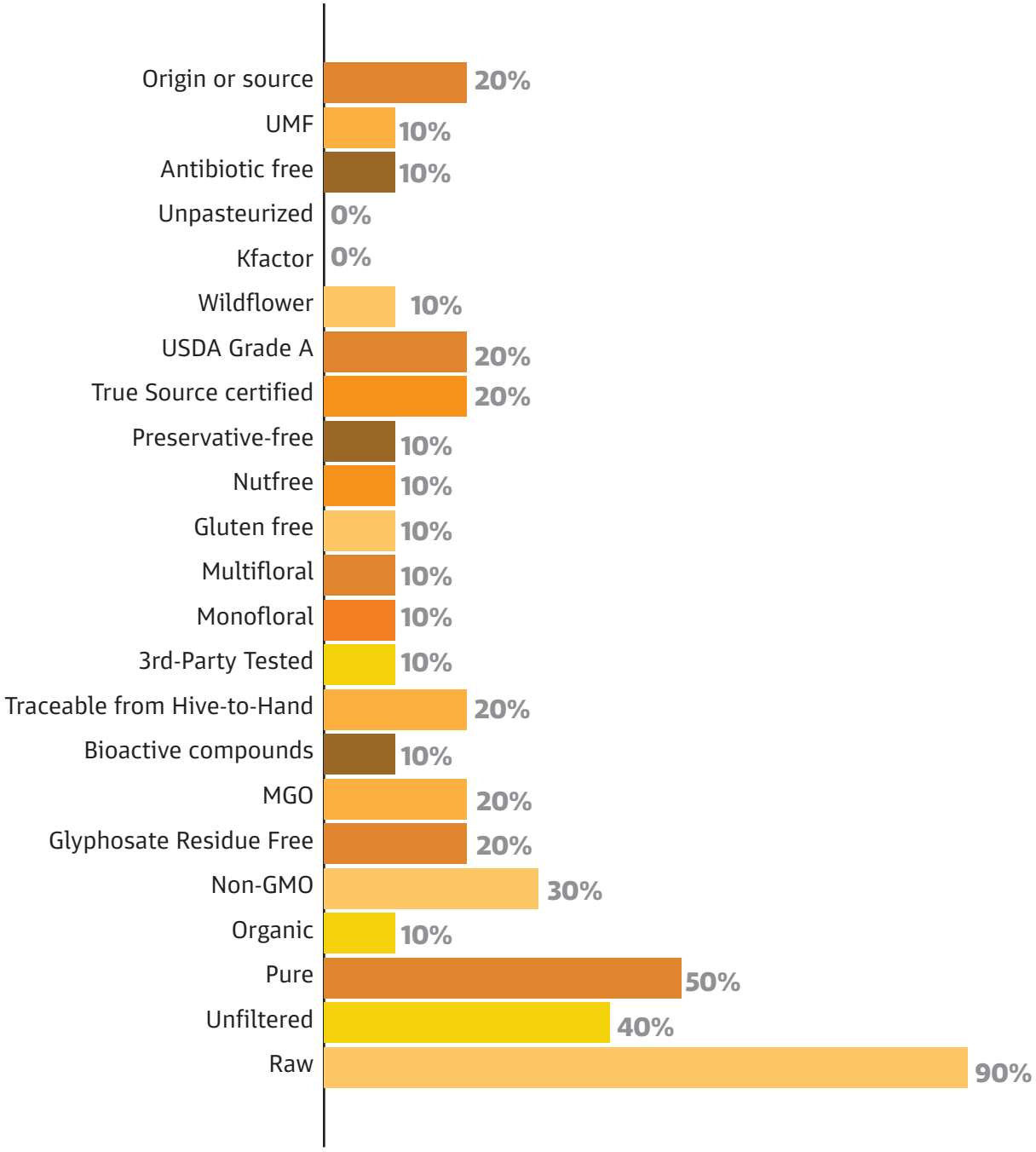


Figure 23: Distribution of Honey Product Attributes (% of Products)

The top sellers each highlight a range of attributes (above) as selling points, dominated by “raw” in 90% of products, pure (50%), unfiltered (40%), and Non-GMO in 30% of products. The average packaging size is the equivalent of 421 ml.

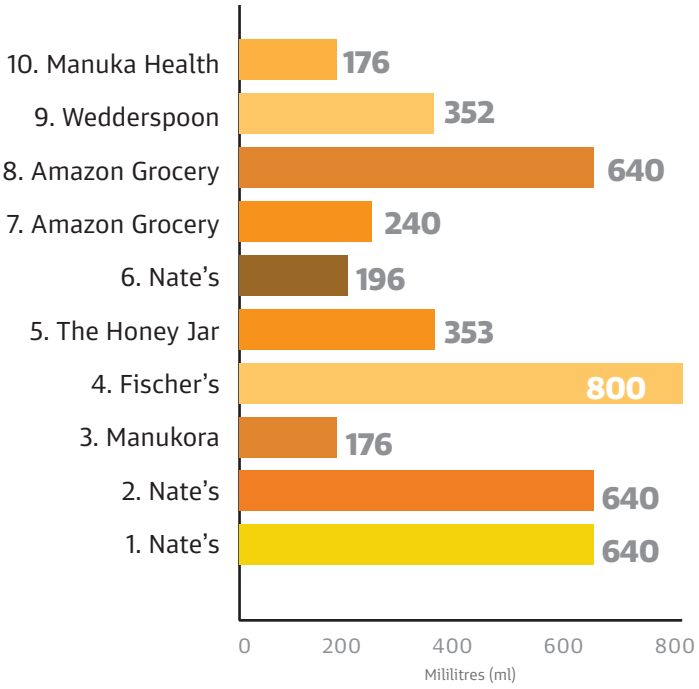


Figure 24: Package size of the top 10 best sellers on Amazon.com. Milliliter equivalent

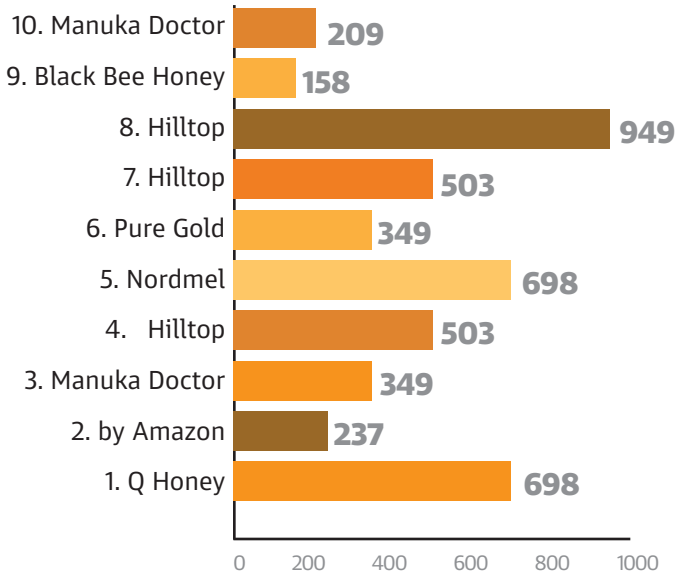


Figure 26: Package size, Amazon-UK's 10 top-selling honey products.

2.3.5| AMAZON-UK

Similarly, we analysed the top 10 best-selling honey products on Amazon.uk. 70% of the products were packaged in plastic, with 50% of the top sellers in squeeze-type containers and 50% in wide-mouth jars.

The average package size was the equivalent of 465 ml. 7 of the 10 top sellers emphasise pure" (70%), while "natural", traceability, and "raw" are emphasised in 4 of the 10 products (40%).

The average per-litre equivalent price across the top 10 is G$8,779, but excluding the two Manuka honeys in the ranking, the average falls to G$4,735.

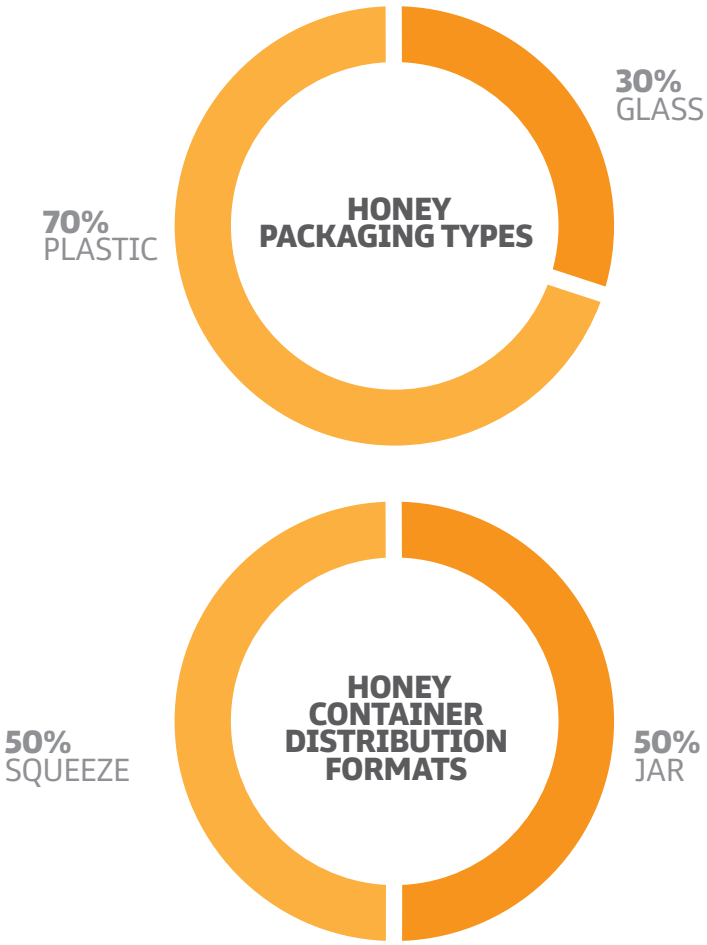


Figure 25: Honey Packaging Types and Container Formats Distribution

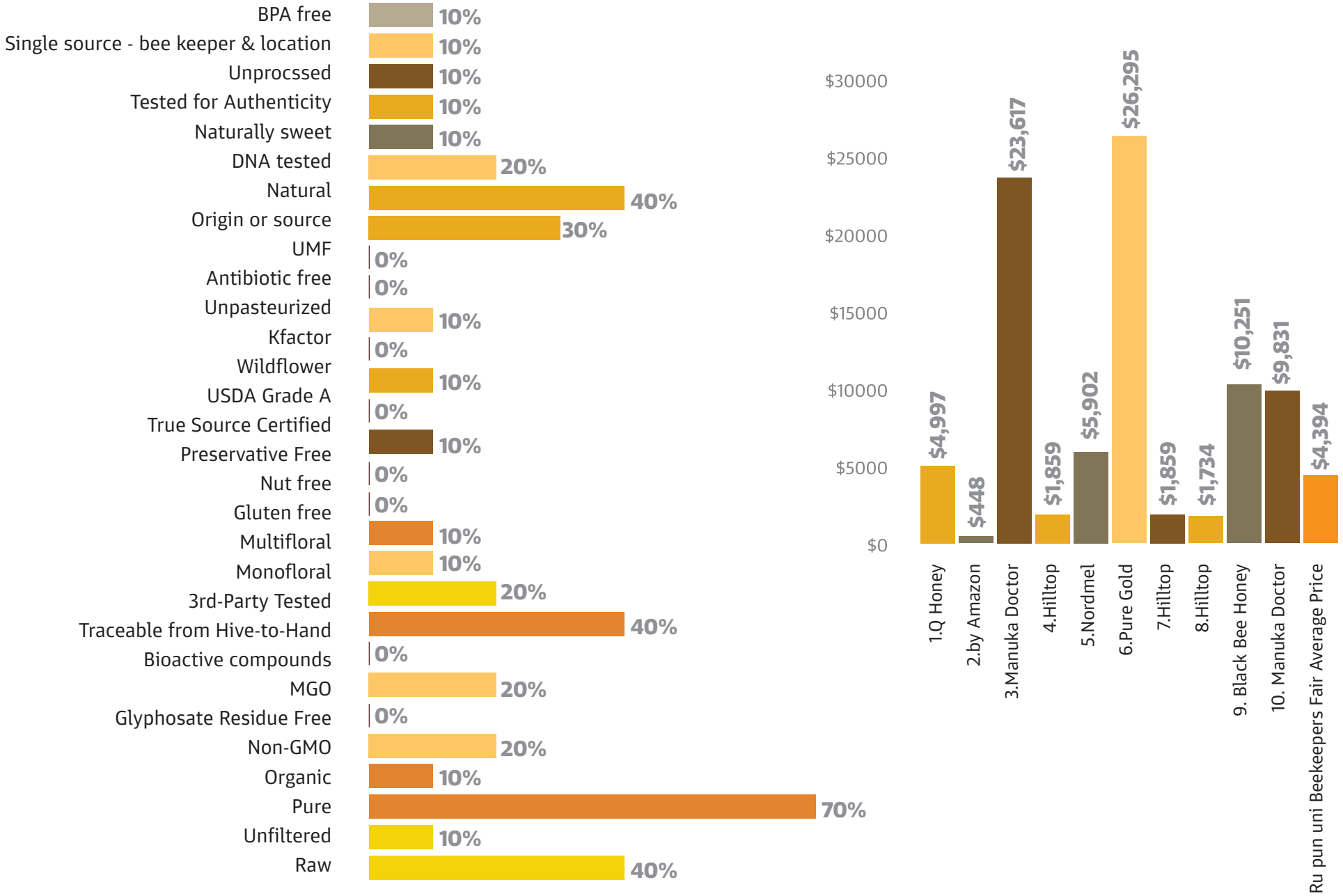
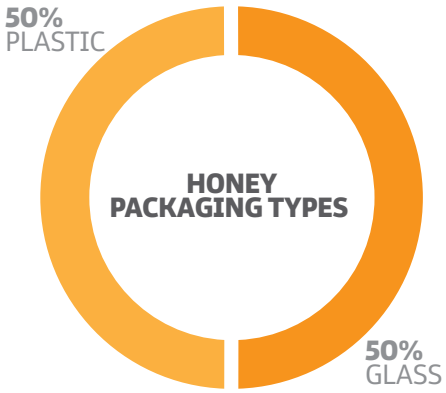


Figure 27 and 28: Attributes (left) and per-litre equivalent pricing (right) for the top 10 best-selling honey products on Amazon-UK.

2.3.5| **AMAZON - GERMANY**

Finally, we looked at the top 10 best sellers on Amazon-Germany.



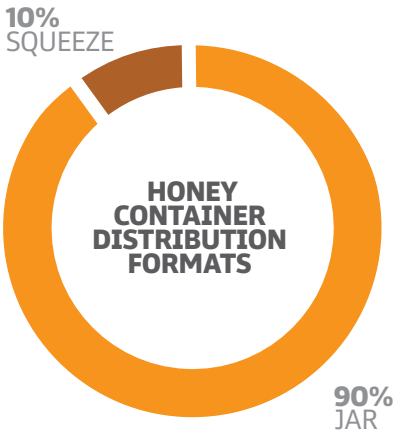


Figure 29 and 30: Honey Packaging Types and Container Formats Distribution

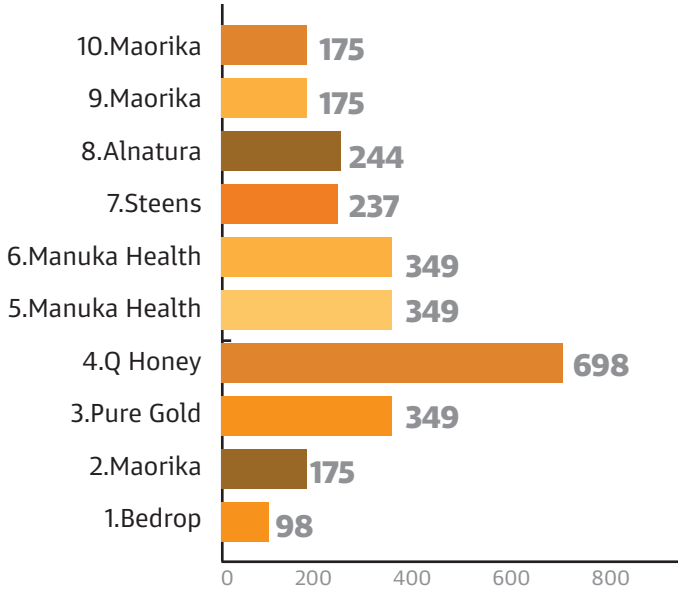


Figure 30: Package size, Amazon-Germany top-selling honey products.

The average package size shrinks to the equivalent of 285ml, while the average price rises to a staggering G$39,007 per litre.

The origin or source of the honey is the most consistently promoted attribute (90% of the products), while the Methylglyoxal (MGO) rating, a measure of the antibacterial, antiviral, and anti-inflammatory properties of manuka honey, is highlighted in 8 of 10 products. Attributes such as “raw”, “pure”, or “natural” are only highlighted in between 1 and 3 of 10 products (10% - 30%).

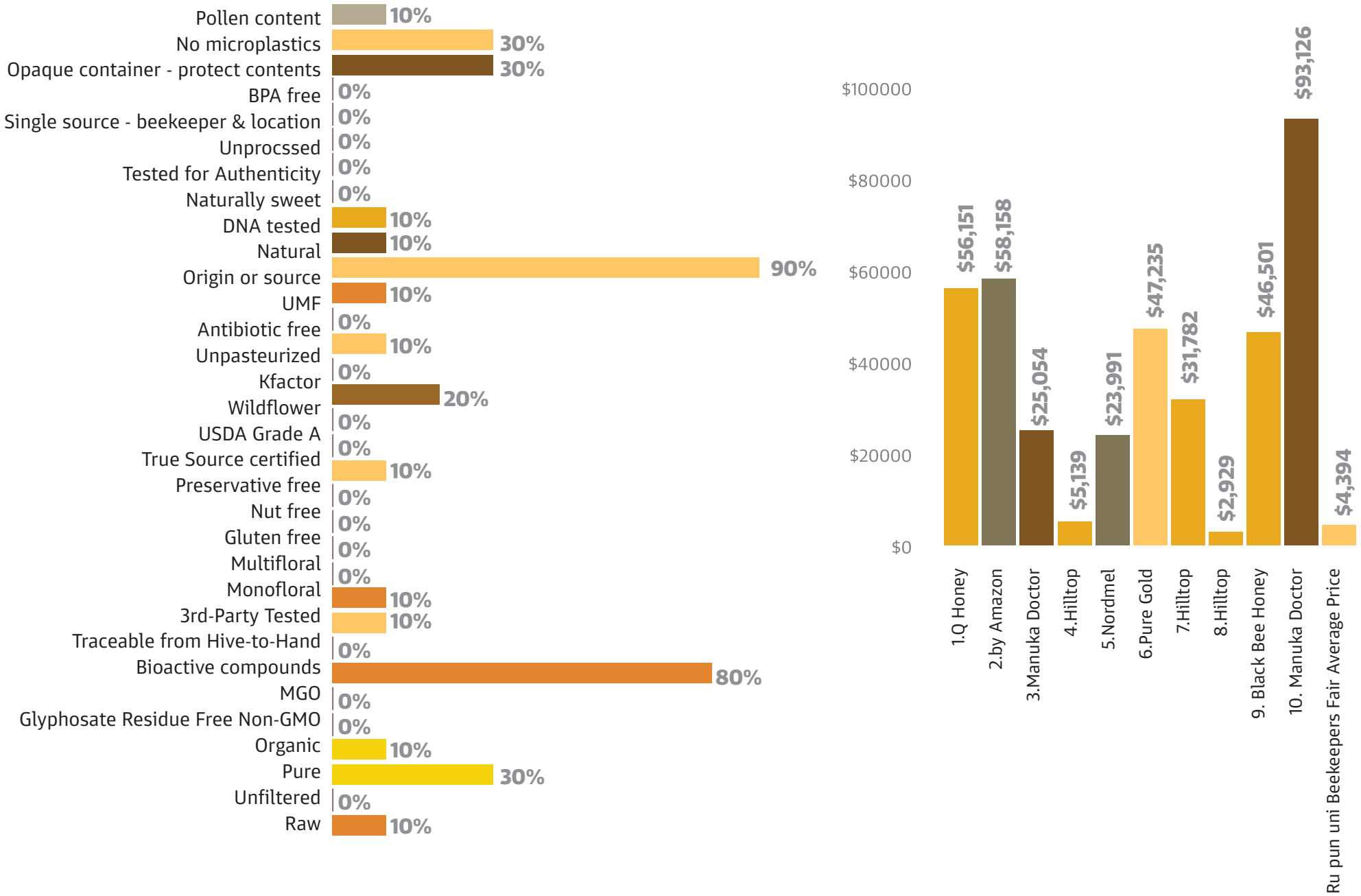


Figure 21: Attributes (left) and per-litre equivalent pricing (right) of the top 10 best sellers on Amazon-Germany



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2.4| HONEY TRADE

The honey trade offers insight into the opportunities and challenges facing Guyana's honey sector in domestic and international markets. This section reviews regulations for personal use, export performance, import conditions, and trade costs. It also highlights how market access, tariffs, and regulatory requirements affect competitiveness and growth potential.

2.4.1| IMPORTING HONEY FROM GUYANA FOR PERSONAL USE

Regulations governing the importation of honey for personal use are distinct from those that apply to imports of honey for commercial purposes (e.g., resale).

UK

Travellers entering the UK from countries outside of the EU (including Guyana) may bring up to 2 kg of honey per person (Government of the UK, 2025).

USA

Tourists can generally bring honey for personal consumption into the U.S. if they declare it to U.S. Customs and Border Protection (CBP) upon arrival. Generally, travelers can bring in comb honey, royal jelly, bee bread, or propolis if it is intended for personal consumption. USDA regulates only honey and beeswax that is being imported for use as feed for bees in apiaries (US Department of Agriculture, 2025).

EU

Travelers entering the EU from countries outside of the EU (including Guyana) may bring up to 2kgs of honey per person (European Union, 2026).

Canada

Each traveler entering Canada can bring up to 20kgs of honey with them for personal use as long as they declare it on arrival (this applies to all food items). There are no other restrictions or requirements (Government of Canada, 2026).

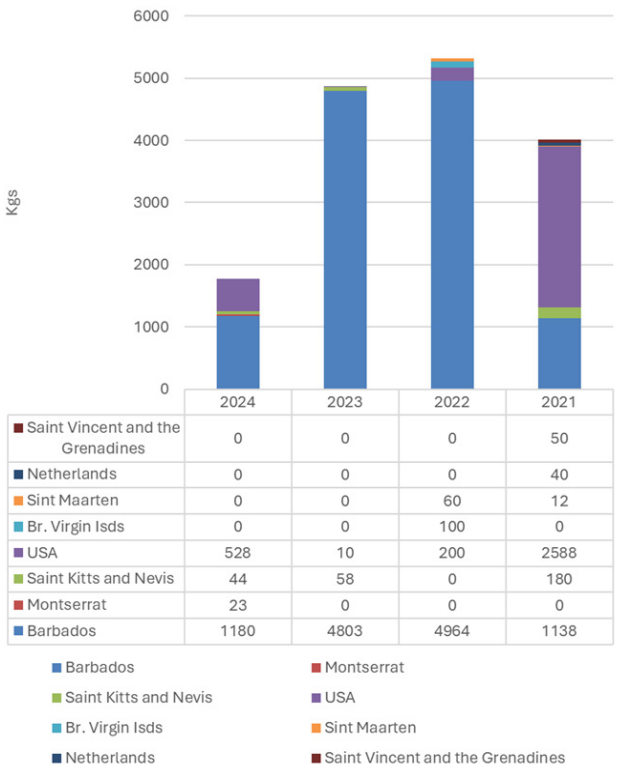
Other countries

The situation in other countries is less clear. While Trinidad & Tobago have started amendments to the regulations governing the importation of honey, it would appear that importing for personal consumption is still restricted[16] . In Brazil[17] and Barbados, it would appear that imports for personal consumption are similarly restricted.

2.4.2| INTERNATIONAL TRADE

EXPORTS

Total exports of honey from Guyana, primarily to Barbados, but to a lesser extent to the Caribbean islands, the US, and Holland, fluctuated between 1100 kg and almost 5000 kg between 2021 and 2024. The export value peaked at around US$30,000 in 2021 and has not reached US$10,000 in any year since.

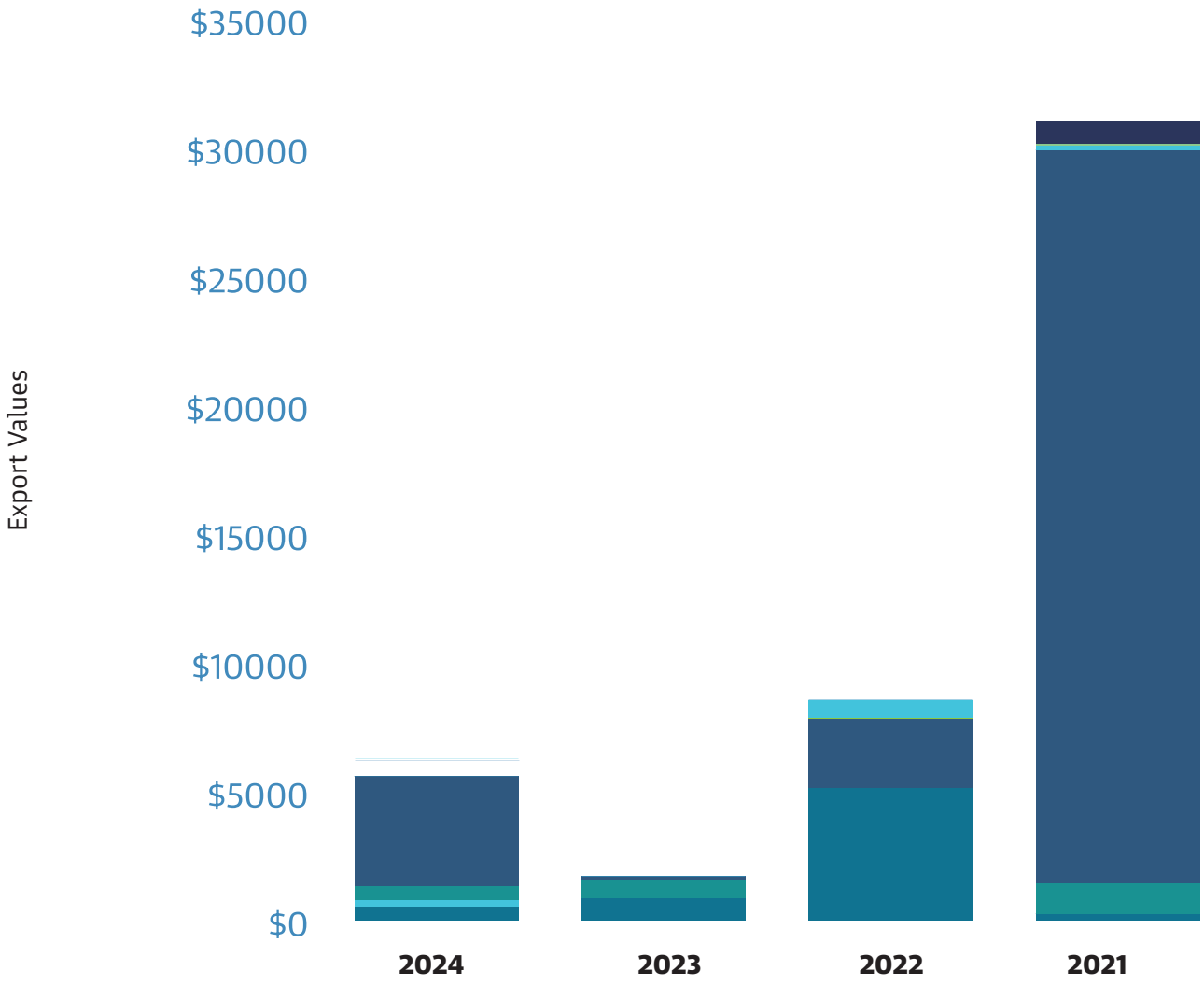


	2024	2023	2022	2021
Saint Vincent and the Grenadines	0	0	0	50
Netherlands	0	0	0	40
Sint Maarten	0	0	60	12
Br. Virgin Isds	0	0	100	0
USA	528	10	200	2588
Saint Kitts and Nevis	44	58	0	180
Montserrat	23	0	0	0
Barbados	1180	4803	4964	1138

Figure 32: Exports of honey from Guyana, 2021 to 2024. Source: UN Comtrade.

16 https://www.visahq.com/trinidad-tobago/customs/#!import-regulations

17 https://www.gov.br/agricultura/pt-br/assuntos/inspecao/produtos-animal/arquivos/REQUISITOSSANITRIOSDESADEPBLICAPARAIMPORTAODEMELEPRODUTOSAPCOLAS_EN_AGO_2022.pdf

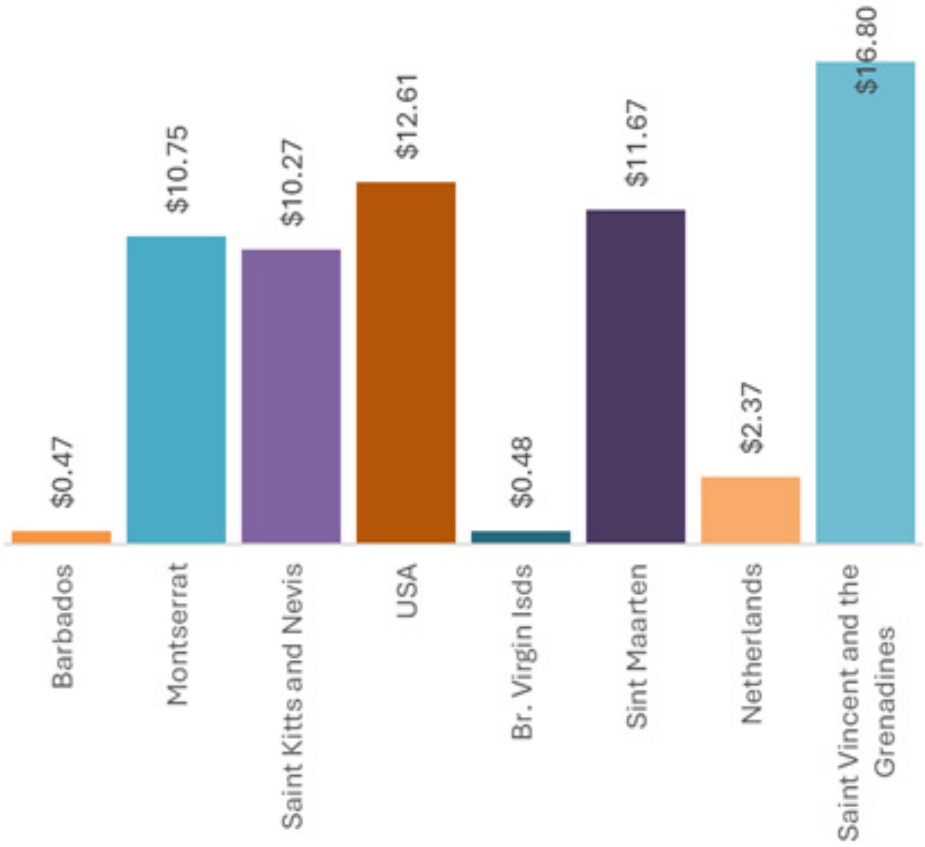


	2024	2023	2022	2021
St Vincent and the Grenadines	$	$	$	$840.0
Netherlands	$	$	$	$95.9
St martin	$	$	$685.9	$142.8
BVI	$	$	$48.0	$
USA	$4,253.2	$180.0	$2,676.3	$28,492.6
St Kitts and Nevis	$556.3	$660.5	$	$1,199.0
Montserrat	$251.2	$	$	$
Barbados	$529.0	$867.2	$5,141.5	$239.8

Figure 33: Value of honey exports from Guyana. All figures in US$.



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2.4.3| IMPORTS

Imports of honey into Guyana attract 40% duty and 14% [18] VAT .

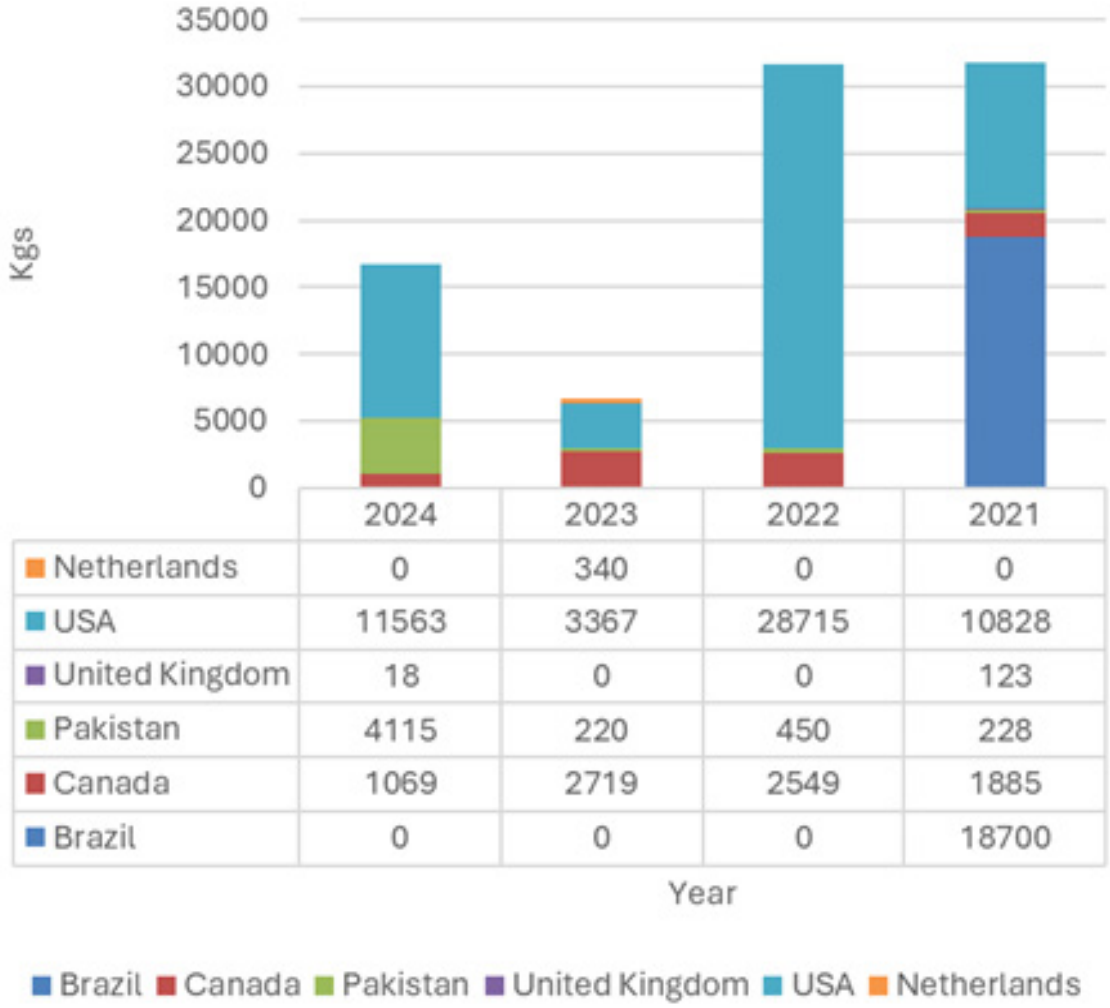


Figure 37: Imports of honey into Guyana, 2021 to 2024. Kg.

18 Honey is not listed among VAT exempted food items: https://www.gra.gov.gy/business/tax-operations-and-services/value-add-tax-services/zero-rated/

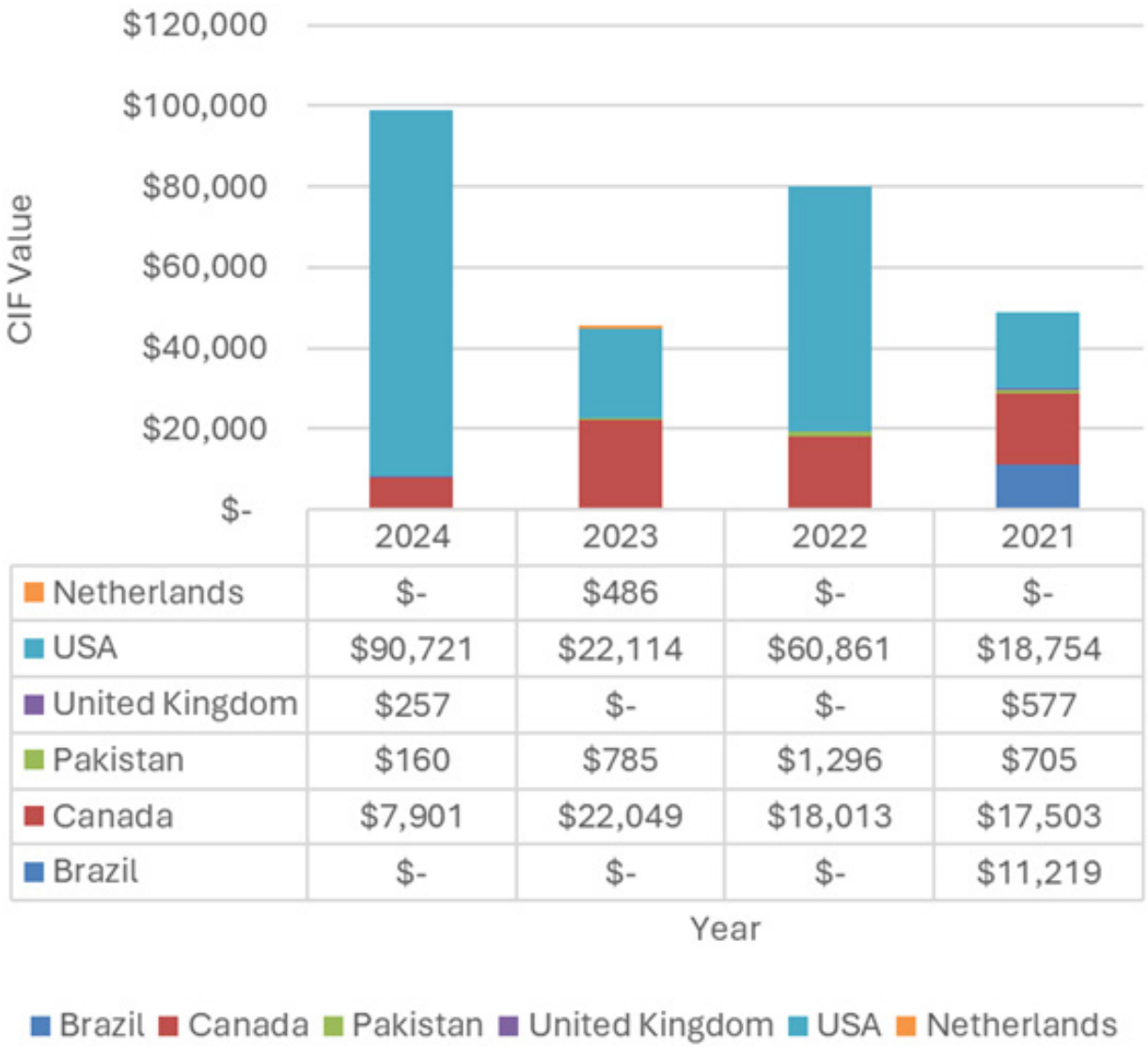


Figure 38: Value of imports landed in Guyana CIF (Cost, Insurance, Freight), 2021 to 2024. US$.

Most recently (2024), imports from Canada and the USA are at CIF (Cost, Insurance, Freight) values of US$7.39 and US$7.85 per kg (approximately G$1537 to G$1632 per kg, or G$2202 to G$2338 per litre).



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2.5 MARKET ENVIRONMENT OUTLOOK

The market environment outlook evaluates economic, industry, and consumer factors affecting opportunities for Rupununi honey. It considers how national growth, infrastructure, imports, and changing buyer preferences impact demand, pricing, and competitiveness. This section also identifies trends and market segments to guide strategies for positioning and expanding Rupununi honey in Guyana and internationally.

2.5.1 | MACRO-ECONOMIC FORCES

Guyana is one of the world's fastest-growing economies, fuelled by rapid oil sector expansion. In 2024, GDP increased by 43.4%, supported by oil production reaching 225 million barrels, and the ripple effect from oil is leading to increased construction, manufacturing, and agriculture. Non-oil GDP rose 13.1%, driven by government-led public investment[19].

Although development financing from international donors is reducing and will likely remain below pre-2025 levels, barriers to accessing capital for entrepreneurs and hinterland communities are reducing. Government grants to Indigenous communities, which significantly increased from 2023 with the allocation of 15% of revenue from the sale of carbon credits, saw approximately $12 billion injected into Amerindian communities in 2025, $4.8 billion of which came from carbon credit revenue[20]. Community population growth, but also additional revenue from other conservation mechanisms, may trigger an increase for some or all communities.

Government is establishing a new, state-backed Guyana Development Bank, set to be fully operational before the end of the first quarter of 2026. Capitalized with an initial US$200 million (with US$100 million injected in the 2026 budget), the bank will provide, zero-collateral, zero-interest loans for Small and Medium-Sized Enterprises (SMEs).[21]

In 2026 or 2027, work is likely to commence on the final stages of the Guyana – Brazil Land Transport Link, complementing existing roads between Georgetown and Linden, ongoing road works between Linden and Mabura, and recent bridge construction between Mabura and Linden. Road transportation between Georgetown and Lethem will likely significantly improved during the dry season, and post-2030 to occur on an all-weather road.

2.5.2 | INDUSTRY FORCES

Beyond cane sugar, the local market for non-honey alternative sweeteners remains small, with a very limited presence of Agave and maple syrup in some supermarkets. Cross-border imports of honey into the Rupununi pose a high-potential threat to the honey market and to honey producers in the region.

GLDA has indicated that bulk honey imports into the Rupununi via the Lethem Crossing have been restricted, as much of these imports are assumed to be adulterated. In contrast, key informants indicate that the trade in bulk honey, typically transported in 5-gallon pails, continues. One key informant imported 10 pails (50 US gallons total) in December 2025 and reports typically importing about 100 pails (500 gallons, 1892 litres) per year.

Both the Food & Drug Department of the Ministry of Health and the Guyana Food Safety Authority have indicated that they currently lack the capacity to test for complex honey adulteration.

HONEY ADULTERATION AND DETECTION

Honey adulteration involves adding inexpensive sugar syrups—typically from C4 plants (corn, sugarcane) or C3 plants (rice, beet, wheat)—to pure honey to increase volume and lower costs.

C4 Adulteration: Involves sugar from corn and sugarcane. Easily identified by the AOAC 998.12 standard carbon isotope test, which detects excessive C4 sugars (>7%).

C3 Adulteration: Involves sugar from rice, wheat, or beetroot. C3 sugars are difficult to detect because they have a similar isotopic signature to natural honey.

Advanced Testing: To detect C3, tests such as LC-HRMS (Liquid Chromatography-High Resolution Mass Spectrometry) and NMR (Nuclear Magnetic Resonance) are required to look for specific molecular markers.

Health Impacts. Adulterated honey poses health risks by raising blood sugar, causing weight gain, and potentially causing long-term, adverse effects on the liver and kidneys.

There have been several attempts to kick-start commercial beekeeping in Guyana's hinterland, including in other regions with protected areas (e.g., Region 1 Shell Beach Protected Area). Anecdotal evidence suggests that the absence of sustained support has stymied growth, and honey from other hinterland regions does not play a role in the national honey market.

Coastal producers have likely produced the vast majority of the 27,601 gallons (about 104,470 litres or 149,670 kgs) of honey generated locally in 2024 and will remain the largest producers. Imports of honey reinforce that this amount is inadequate to supply the coastal market, and therefore that there is no competing role for coastal honey in the Rupununi.

19 https://www.worldbank.org/ext/en/country/guyana#tab-economy

20 https://www.stabroeknews.com/2026/01/29/news/guyana/amerindian-communities-received-12b-last-year-singh/

21 https://newsroom.gy/2026/01/26/budget-2026-us100-million-to-be-injected-into-new-zero-interest-development-bank/

There have been several attempts to kick-start commercial beekeeping in Guyana's hinterland, including in other regions with protected areas (e.g., Region 1 Shell Beach Protected Area). Anecdotal evidence suggests that the absence of sustained support has stymied growth, and honey from other hinterland regions does not play a role in the national honey market.

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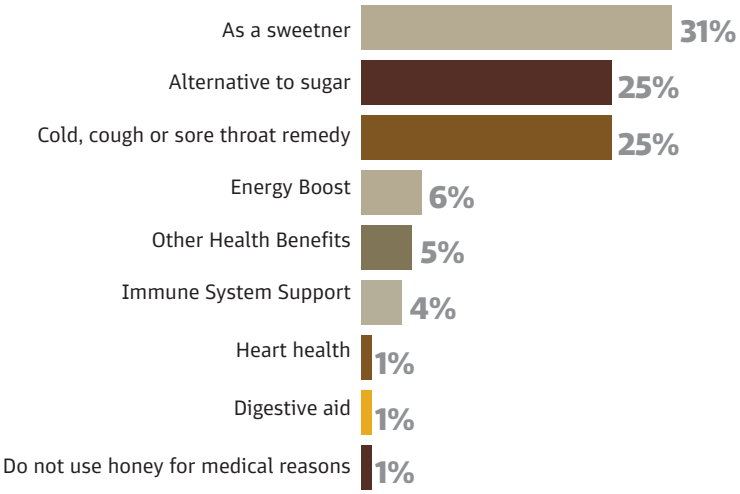


Figure 39: Primary Uses and Health Benefits of Honey Among Consumers (%)

While 31% of consumers' main reason for using honey was as a sweetener, cumulatively 60% used honey primarily for medicinal or therapeutic reasons, including as a cold, cough or sore throat remedy, as a low glycemic alternative to sugar, or for immune system support.
In terms of packaging material, slightly more consumers preferred glass (41%) than plastic (39%), while for 20% the type of packaging material did not matter.

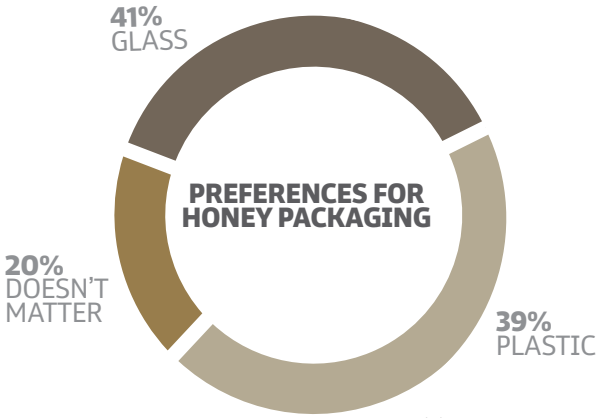


Figure 40: Consumer Preferences for Honey Packaging Types (%)

Regarding package size, 20% preferred a 1-litre container, while 25% preferred the ½-litre size. 24% preferred packaging in the 250-350ml range, and only 17% would preference 750ml. for 15% of those surveyed, the size of the container did not matter.

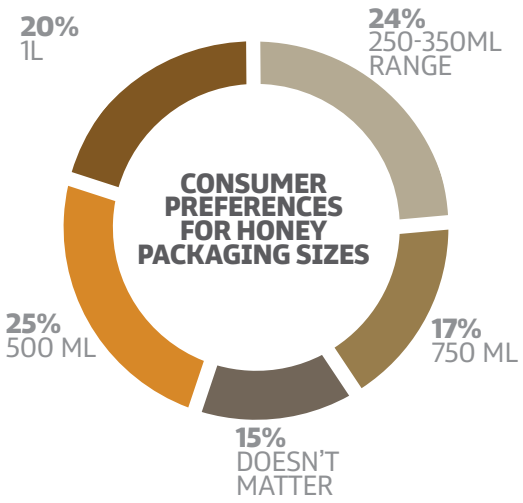


Figure 41: Consumer Preferences for Honey Packaging Sizes (%)

We added a trivia question on whether it was safe to feed honey to infants under 1 year old. 16% said it was safe to give infants under 1 year old honey, while 40% said it was not. 44% said they did not know.

Babies younger than 1 year old should not be given honey. That's because a type of bacteria (called Clostridium) that causes infant botulism can be found in honey[22] .

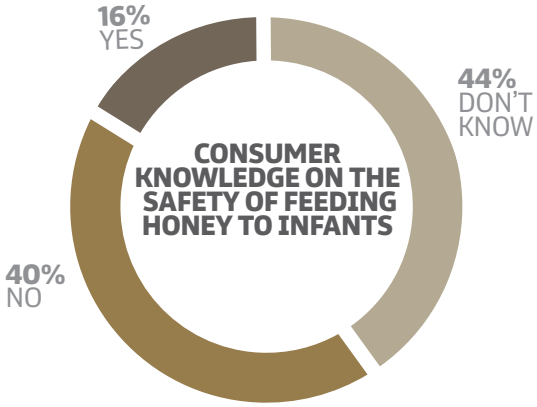


Figure 42: Consumer Knowledge on the Safety of Feeding Honey to Infants Under One Year Old (%)

22 See more on botulism for example at https://www.healthdirect.gov.au/botulism



Figure 41: Fairtrade honey on the German market.

Fairtrade and ethical honey are increasingly important in Europe, the US, Canada, and the UK, driven by consumer demand for sustainability, product transparency, and, in Europe, stringent regulations. Fairtrade has established standards for honey[23].Some retailers in European markets actively promote imported honey from Latin America.

As health-conscious consumers shift away from refined sugars, demand for traceable, "clean" honey has turned ethical sourcing into a significant market differentiator rather than a niche preference[24].

2.5.3 | **LOCAL MARKETS**
MARKET FORCES & CUSTOMER SEGMENTS

Adults in Amerindian Villages

Adult shoppers in Amerindian villages in the Rupununi are most likely to be very price-conscious, with comparatively high levels of poverty in the Region relative to other regions. Rupununi beekeepers report selling bottled honey directly to buyers in their home villages and in neighbouring villages, without labels, and in used (washed) bottles. Price sensitivity will likely relax somewhat as income levels rise, a function of increased wage labour and increased cash transfers to hinterland households.

Adults in Georgetown and coastal Guyana

Adults shopping for honey in Georgetown are likely to be from middle- and upper-income families, including expat communities.

They are likely to be less price sensitive than household buyers in the Rupununi, owing to higher levels of disposable income. This customer segment is likely to expect proper packaging, comparable at least with lower end imported food products. Brand loyalty is likely relatively high as coastal consumers will have concerns about adulterated honey. Some buyers will have direct relationships with beekeepers known to them and will procure their supply directly from them.

Others will most likely buy their honey in established supermarkets (where all legally imported honey is sold), while less discerning buyers and low-income households may purchase honey from roving vendors, likely selling rebottled Brazilian honey and honey-like substances, some of which is labelled and marketed to suggest it was harvested in the Rupununi.

Domestic visitors the Rupununi (Adults)

Guyanese residents visiting the Rupununi are another likely customer segment. This segment are either visit family and friends, working in the Rupununi on multi-day trips, or are domestic tourists. These will seek out “authentic” honey, either branded or unbranded in local shops. Events (Rupununi Expo, Rodeo, Christmas Fair etc) are good opportunities for this segment to purchase honey.

All domestic buyers are likely to be sensitive to the impacts of inflation on the cost-of-living. Food inflation in Guyana remains a significant cost-of-living driver in 2026, with annual food prices rising by 8.2% as of August 2025 and projected to stay high due to imported price pressures. While the overall inflation rate was

23 https://www.fairtrade.net/content/dam/fairtrade/fairtrade-international/standards/small-scale-producer/honey/Honey_SPO_EN.pdf

24 https://www.cbi.eu/market-information/honey/certified-honey/market-potential
https://www.persistencemarketresearch.com/market-research/organic-honey-market.asp

contained around 2.5%–4.2% in 2025 due to government subsidies (e.g., zero excise tax on fuel, freight adjustments), food prices (specifically, vegetables and staple items) continue to escalate, with some reports citing a 75% increase in basic food items over the past four years[25].

International visitors to the Rupununi

International visitors to the Rupununi fall broadly into two categories:

1. International birders, sports fishers and nature enthusiasts.
2. Brazilian visitors primarily visiting Lethem to shop for low costs consumer goods.

International birders, sports fishers and nature enthusiasts are likely to have higher disposable income, given the comparatively high cost of the Rupununi nature experience.

While we could find no recent data on tourist spending in the Rupununi, but in other countries nature-based tourists average souvenir spend per person can range from US $12-$32 per day[26]. Other, older studies suggest tourists to national parks spend around 10% on souvenirs and other expenses while in country[27].

Brazilian tourists spend R$425, on average, with personal purchases and gifts on trips[28].

The second category, Brazilian shoppers, cross by road from neighbouring Roraima, and are relatively price sensitive. Their primary objectives are consumer goods (clothing, cosmetics, electronics) and they are unlikely to be very interested in Guyana's comparatively expensive honey.

25 https://www.stabroeknews.com/2026/01/18/news/guyana/idb-warns-food-import-prices-could-intensify-inflation-in-guyana/

26 https://documents1.worldbank.org/curated/en/099033125134036921/pdf/P176490-ff101949-913f-4683-b57e-9c6103325e04.pdf?utm_source=chatgpt.com

27 https://www.nps.gov/blue/learn/news/tourism-to-local-national-parks-creates-over-51-million-dollars-in-economic-benefit.htm?utm_source=chatgpt.com

28 https://www.gov.br/turismo/pt-br/assuntos/noticias/brasileiros-gastam-r-425-em-media-com-compras-pessoais-e-presentes-em-viagens?utm_source=chatgpt.com



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2.6| INPUT MARKETS NON-HONEY MARKETS

Input and non-honey markets are vital for supporting a competitive and diversified beekeeping sector. This section reviews the availability, cost, and accessibility of equipment, supplies, and materials, including benefits from duty exemptions and regional suppliers. It also discusses how non-honey products and supporting inputs can enhance enterprise development, productivity, and income opportunities for Rupununi beekeepers.

2.6.1 | INPUT MARKETS NON-HONEY MARKETS

Imports of beekeeping machinery (HS 8436.80) are duty-free. Equipment and materials for use in beekeeping imported by or on behalf of a beekeeper are fully exempt from import duties (Part III of the First Schedule, Section B, Item 9 (5) 2017 National Tariffs).

2.6.2 | BEEKEEPING EQUIPMENT & SUPPLIES

There was no beekeeping equipment or supplies available for purchase at the RLPA hub in Lethem as of November 2025.

Yimochi Melville, owner of the Mabadap brand of bee products and a leading apiculturist in the Rupununi, offers a limited range of beekeeping equipment. Langstroth hives with a single super are G$35,000 each (with a double super G$45,000), bee suit jackets are G$18,000, and jackets with pants are G$25,000.

There are a number of established specialist apiculture suppliers online in Brazil offering a range of beekeeping equipment and supplies, including shipping to addresses in Roraima state.
https://www.mezzaliramix.com.br/ is a specialist online apiculture store offering a range of beekeeping equipment, specialised packaging material for honey, post-harvest equipment, and clothing.



©Trevor Smith / WWF-Guianas

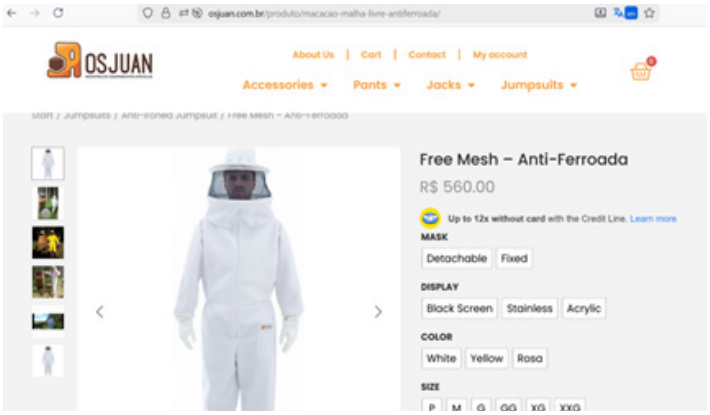


Figure 46: Other online retailers include Agrobees[1]



Figure 45: Online Supplier Offering in field clothing for beekeeping

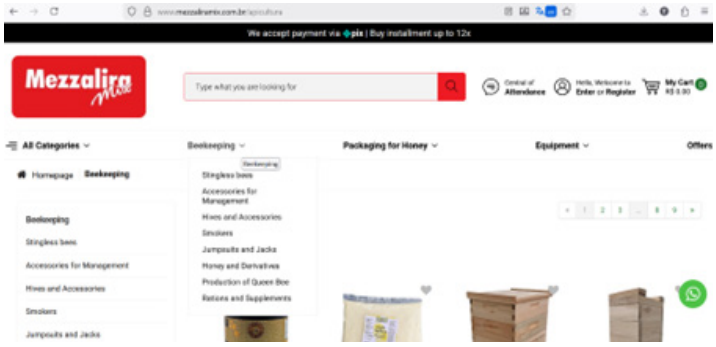


Figure 44: Online Supplier Offering Limited Beekeeping Equipment and Supplies Without Packaging Materials [29].

29 https://www.mercadoapis.com.br/ Description: Sells a smaller range of equipment and supplies but does not sell packaging material.
https://osjuan.com.br/ Description: Specializes in field clothing for beekeepers, including full jumpsuits, jackets, gloves, pants and masks.
(https://www.agrobees.com.br) and SR Apicultura (https://srapicultura.com.br).



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2.7| MARKET MAP – HONEY MARKET IN GUYANA

This market map is a flow chart illustrating the honey value chain in Guyana. It highlights the relationships among producers, traders, processors, retailers, and consumers in the Rupununi, coastal regions, and export markets. The chart summarises product flows, indicative prices at each stage, and marketing channels. Dashed lines represent inferred or unverified market linkages based on available data and interviews. All prices are shown in Guyana dollars (G$) per litre equivalent.

2.7.1 | MARKET MAP – HONEY MARKET IN GUYANA

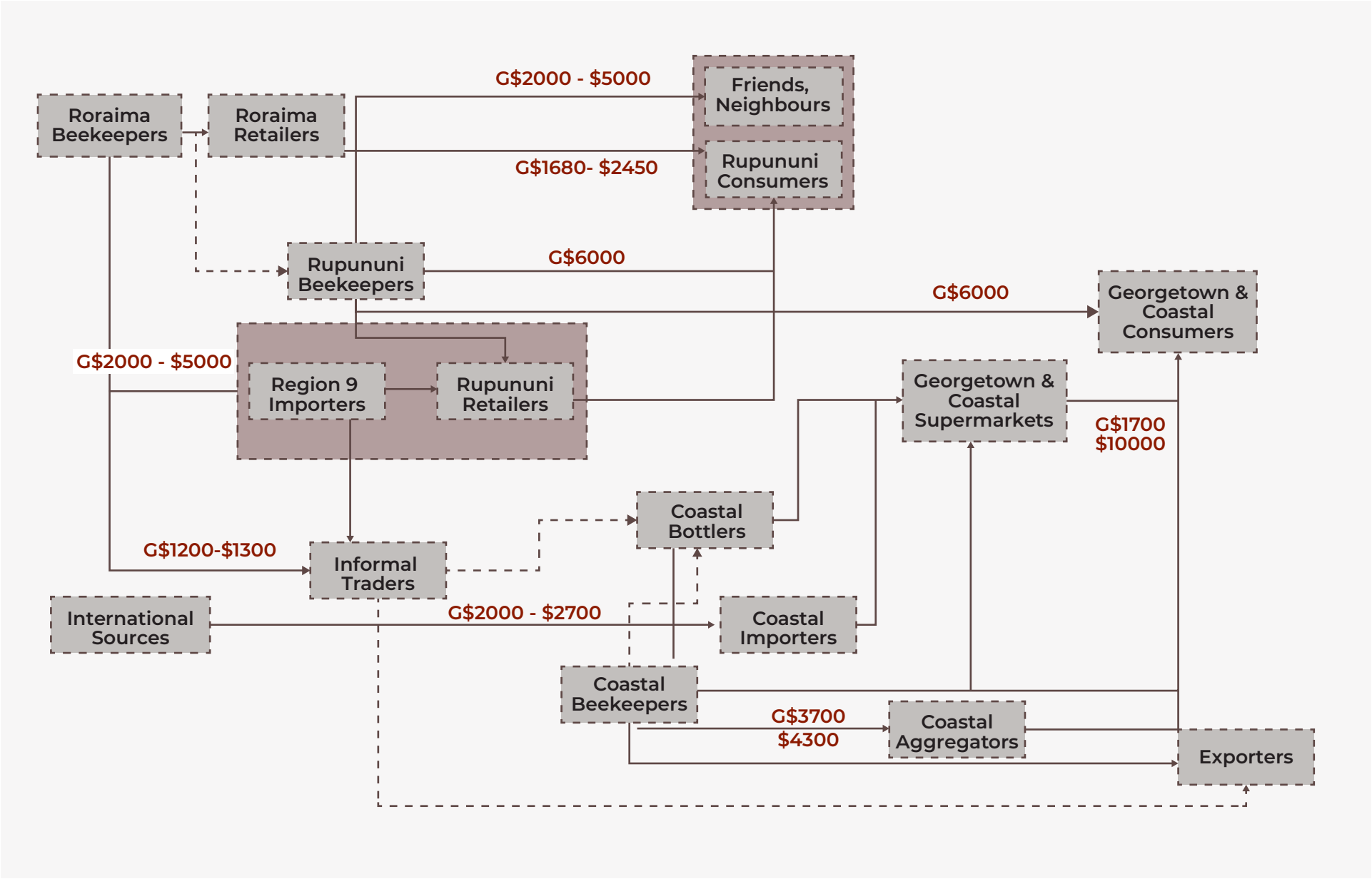


Figure 47: Market map summarizing product flows and pricing across the value chain. Dashed lines denote unverified flows that can be inferred from the data, or from key informant interviews. All prices are G$ per liter equivalent.

2.8| CONCLUSIONS

Rupununi beekeepers currently enjoy high prices for their honey compared to markets in neighbouring Brazil, coastal Guyana, and to some Caribbean markets. This is particularly true in direct marketing channels (e.g., at fairs, expos and events).

The nature and community-based tourism (souvenir) market is untapped. It represents a high value market with potential to deliver higher returns for local beekeepers, and to establish a long-term pathway to sustain comparatively high returns as beekeepers expand production.

The Rupununi's protected areas (KMPA, to some extent Iwokrama) and any existing or new community conservation areas are the queen bees, the most important asset, in any strategy for long term high-value growth of the honey sector in the Rupununi. It is the Rupununi's unfair advantage.

Accessing high value markets and consistently capturing a large share of value for Rupununi beekeepers will require:

1. Systems to insulate and differentiate Rupununi honey from honey imported from other areas (including Brazil) and from honey-like substances.

2. Systems to further differentiate honey harvested from protected and conservation areas from honey harvested elsewhere in the Rupununi (e.g., from commercial plantations of citrus, soybean etc).

3. Close collaboration between Rupununi beekeepers, and between beekeepers and enablers (RLPA, GLDA, possibly District Councils including KMCRG) and between these bodies and regulators (FDD, GFSA).

4. Close collaboration with organisations managing or facilitating conservation and protected areas, including the PAC, Village Councils and District Councils.

5. A local facilitator to manage and harmonise the processes of expanding production and market access. This could be RLPA or a similar member-based organisation.

Undeclared imports of honey & honey-like substances across the Brazilian border are happening and are likely to continue. Honey produced in neighbouring Roraima state and fake honey ("mel falso" or "adulterado") will expand its stake in the Rupununi and national honey market as Rupununi beekeepers tap into a high-value market, and to the extent that honey production in the Rupununi does not expand to provide affordable honey to local price-sensitive consumers.

Investments in research could provide Guyana's manuka moment,[30] potentially unlocking new opportunities for growth. Maciel and Cabral's detailed overview of bee research in Roraima state (Edymeiko de Souza Maciel, 2025) provides valuable insights into the honey value chain in a landscape very similar to the Rupununi.

This excellent overview highlights the scope for further scientific, technical and market research into beekeeping in the Rupununi, with the potential to vastly expand our ability to grow both the scale and returns from beekeeping. This is a critical entry point for GLDA, NAREI, UG, PAC, WWF, CI and similar organisations in the enabling environment.

Using 2024 and 2025 figures, the national honey market in 2024 likely stood at around 182,000 kg or 128,000 litres, of which about 12% was covered by imports (formal and informal) and almost 90% by local production. Rupununi producers likely contributed around 1% to national production in 2024, producing around 1,000 – 1,500 litres (1,420 – 2,130 kg).

Current Rupununi production is overwhelmingly sold locally in villages and then on the wider Rupununi market. The value chain is, for all intents and purposes, short and very underdeveloped.

On average, beekeepers perceive $4,394 as a fair price for 1 litre of honey, $3,472 for 750ml, and just over $ 1,000 for a 150ml container of honey. 2025 Retail prices for Rupununi honey, on sale in the Rupununi, sat at around $6000 per litre.

Production in neighbouring Roraima state accounted for 0.13% of total national production in 2024 (85,692 kgs), about 50% of Guyana's national production that year, down from a peak of 165,000 kgs in 2023.

At approximately G$ 2,400 per litre, packaged, labelled, and certified honey in Brazil, including in neighbouring Boa Vista, is about ½ (50%) of the average price that Rupununi beekeepers aspire to sell their honey at

30 Mānuka (Leptospermum scoparium) is a native Australian and New Zealand shrub famous for producing potent antibacterial honey and therapeutic essential oil. Manuka honey cost varies widely by MGO/UMF rating and size with rare extra-high potency versions reaching hundreds of US dollars for amounts less than 250g.

(G$4,394).

"Conservation honey", honey products associated with a protected or conservation area, find buyers in western markets at an average equivalent retail price of G$11,686 per litre, with a maximum of almost $19,000 per litre, 2.6 and 4.3 times the average aspiration price of Rupununi beekeepers.

Locally produced honey in Georgetown supermarkets weigh in around G$3,639 per liter, almost 20% below the average aspirational Rupununi price, and well below the average retail price for honey in other Caribbean markets (TT: G$8,854 per liter, Jamaica: G$6,458, except Suriname, where the lone reference point that we could find sits at G$3,686 per liter).

We compared the top 10 honey products on Amazon-US, Amazon-UK, and Amazon Germany to get a sense of their pricing, attributes, and positioning in these markets. This information is relevant not for informing potential exports to these countries, but, conscious of the fact that many people from these countries visit Guyana and the Rupununi, for deepening the understanding of consumer expectations in marketing products locally to international travellers.

In the US, buyers appear more price-conscious, reflected in relatively low prices (at the lower end around G$3,200 per litre equivalent), and the 100% use of plastic packaging for the Amazon-US top 10 honey products. Only 20-30% of the top ten products promote their therapeutic or medicinal attributes.

In the UK, based on Amazon UK's top ten rated honey products, the market splits into a group of very low-priced honey products – primarily positioned as sweeteners at average prices below the equivalent of G$2000 per liter, and a second category of high-end honey promoting origin, medicinal and therapeutic attributes with an average price per liter equivalent between G$9000 and G$26000. The share of glass packaging rises to 30%.

Amazon-Germany's top ten-rated honey products are predominantly positioned to reflect honey's therapeutic attributes and its connection to wellbeing. Disregarding two low-priced products in the G$3,000 – G$5,000 range, the average equivalent price per litre moves to a staggering G$39,007 per litre, and as high as G$93,126 per litre. Package size shrinks to between 100ml and 400ml for the most part, and the share of glass packaging rises to 50%.

Travellers importing honey from Guyana for personal consumption into the US, UK, Canada, and the EU (major destinations for visitors to Guyana) face no regulatory hurdles for amounts between 2kg and 20kg of honey (limits vary by country).

Total exports of honey from Guyana, primarily to Barbados, but to a lesser extent to the Caribbean islands, the US, and Holland, fluctuated between 1100 kg and almost 5000 kg between 2021 and 2024. The export value peaked at around US$30,000 in 2021 and has not reached US$10,000 in any year since.

Formal imports of honey into Guyana fell from approximately 30,000kgs in both 2021 & 2022 to about 6,000kgs in 2023 before climbing to 16,000kgs in 2024. The CIF value of imports peaked in 2024 at almost US$100,000, signalling a G$20M+ import substitution market for local beekeepers.

Informal or unregulated imports of honey and honey-like substances (mel falso) over the Guyana-Brazil border appear to continue despite the efforts of local authorities to limit the flow. Often sold in Georgetown and coastal markets as "Rupununi" honey, this trade poses a direct threat to Rupununi beekeepers and to any attempts to build a strong brand.

In Guyana, and specifically in the Rupununi, there is currently no reliable, systematic way to differentiate between pure and adulterated Brazilian honey, or between honey and honey-like substances.

Adulteration concerns are not only at the Brazilian border but also globally. The prevalence of honey fraud (adulteration with syrup) has led to increased demand for and testing of authentic, certified raw honey. The complex equipment required to test sophisticated fake honey blends means that small producers and economies must find novel ways to secure their brands and consumer confidence.

As health-conscious consumers shift away from refined sugars, demand for traceable, "clean" honey has turned ethical sourcing into a significant market differentiator rather than a niche preference. Organic, Fairtrade and ethical honey are increasingly important in Europe, the US, Canada, and the UK.

There are four main customer segments in the market for Rupununi honey.
Consumers in Amerindian communities are likely the most price-sensitive group and offer the lowest returns for a litre of honey sold by Rupununi's beekeepers. They constitute the bulk (by volume) of sales made by Rupununi's beekeepers and are an important customer segment for non-commercial reasons.

At the other extreme lies the largely untapped market of international visitors, in the Rupununi for birding, nature, and community-based tourism. They hail predominantly from the EU, UK, US and Canada, and are environmentally and ethically conscious buyers. They boast comparatively high purchasing power, and at least in the case of visitors from the EU, expect high prices for ethical and organically sourced honey.

Local coastal buyers, whether in the Rupununi as tourists or in employment, or whether at home in Georgetown or other areas of the coast, form two additional customer segments. They have more disposable income than Amerindian households and value honey's medicinal and therapeutic properties, much like consumers in places like Germany.

Input markets, for beekeeping equipment and supplies, a part of the overall enabling environment, are limited in the Rupununi. One leading beekeeper produces some equipment for sale, but overall, a wide range of equipment is not easily available in Lethem.

2.9| RECOMMENDATIONS

These recommendations are aimed at growing the honey sector in the Rupununi, increasing income for a growing number of Rupununi beekeepers without compromising the supply of honey to Rupununi's residents.

Some recommendations from the RLPA 2025/2026 production assessment are worth briefly repeating here. Without an increase in production, the market-related measures recommended further below will increase income for beekeepers at the expense of local people and will hasten the share of Brazilian honey on the Rupununi market.

- Investing in beekeeper capacity to keep records of both production and financial transactions, but also to understand approaches and methods for pricing and positioning products.

- Enabling a multistakeholder collaborative approach to developing the sector. Combining the dynamism of RLPA with the resources of government, and the research capacity of GLDA, NAREI, UG, CI, WWF, PAC and others can deliver a foundation for sustained growth and increased income for a larger number of beekeepers.

Premised on increased production of honey by Rupununi's beekeepers, the following measures should be considered.

Manage the pace of sector growth.

1. Identify and resource a facilitator of sector growth. A local organization with Region-wide reach (RLPA seems like the most logical fit), or another member-based producer organization, is best placed to ensure **(i)** gains made flow back into the sector, and **(ii)** the inner-regional supply of honey is not compromised.

2. Expand the RLPA hub model to focus on beekeeping. Stock and make accessible at cost + margins that ensure the sustainability of the supply & support business, including all equipment and supplies necessary for production, post-harvest, and marketing.

3. Facilitate the participatory design and development of independent producer labels that meet FDD standards, meet retailer expectations, and are distinctly Rupununi.

4. Through the appropriate channels, facilitate the sale of Rupununi honey on behalf of local beekeepers. In this regard, act as a gatekeeper for Rupununi honey, despite the fact that there is unlikely to be a single Rupununi honey brand, but rather a range of independent brands.

5. Working closely with research institutions, develop and enable a research program for Rupununi honey that will enable the deepening of knowledge of the Rupununi honey ecosystem, and deliver valuable insights and scientific background to enhance the positioning of Rupununi honey in the market.

6. Provide accurate up-to-date information to sector enablers, particularly government agencies.

7. Curate the Rupununi honey story. Through web and social media, events and presence, build the narrative that supports the ambition for Rupununi's honey. In addition, work with regulators and other public service providers to educate consumers about:
   a. The negative health and economic impacts of adulterated honey.

b.The properties of honey and its uses.

Facilitate the partnerships and agreements necessary to form and sustain a symbiotic relationship between beekeepers and the managers of protected and conservation areas.

Monitor market dynamics and generate data to effectively manage growth.

1. Encourage VR to collect and publish Rupununi visitor arrival data.

2. Depend on understanding (potentially through research between VR & RLPA) into tourist spending in the Rupununi.

3. Gather critical information on preferences and uses from all main customer segments.

4. Document cross-border trade in honey and honey-like substances.

5. Track progress against a developed results chain and framework.

Position Rupununi honey at the high end of the market.

Progressively capture the (related) conservation and therapeutic markets, where consumers are willing to reward care for nature, ethical and organic production, traceability, pristine origin, and purity.

1. Develop standards for **(i)** all Rupununi honey and **(ii)** for Rupununi honey produced in protected or conservation areas. These standards form the basis for the unwritten contract between Rupununi beekeepers and buyers of Rupununi honey.

2. Develop a certification system for **(i)** all Rupununi honey and **(ii)** for the subset of Rupununi honey produced in protected or conservation areas. The system ensures the traceability and authenticity of honey that claims to be from the Rupununi. This may involve investments in honey harvesting, including mobile honey houses, as the most effective way to undermine efforts to inject Brazilian and fake honey into the chain.

Be prepared to support a diversified range of honey products.

1. This range addresses different customer segments with different value propositions, and could include:

   a. An affordable honey product line, certified to have originated in the Rupununi and to be free from adulterants, sealed and tamperproof, likely packaged in plastic bottles or jars (but possibly in glass), for the price-conscious market.

   b. A premium multifloral honey product line, certified to have originated in a protected area, or in a community conservation area of the Rupununi, and to be free from adulterants, sealed and tamperproof, likely packaged in either glass or plastic jars, with labelling (on product of transport packaging) that celebrates its origin, for the tourist and visitor markets.



   c. Various multi- but more likely monofloral honey product lines, each with unique documented therapeutic or organoleptic properties, certified to have originated in a protected area, or in a community conservation area of the Rupununi, and to be free from adulterants, sealed and tamperproof, likely packaged in either glass or plastic jars, with labelling (on product of transport packaging) that celebrates its origin, for the tourist and visitor markets.

2. Give local beekeepers the choice of packaging materials. Recognise that most high-value markets for honey are dominated by glass, but that plastic packaging is necessary to cost-effectively serve price-sensitive markets. In both cases, a variety of sizes will allow beekeepers to present multiple value propositions.

3. Revamp product labelling to reflect the high likelihood that buyers are more likely to purchase and use honey for health and therapeutic reasons.

4. Drive innovation in packaging and presentation, including a variety of tamperproof seals, transport packaging, package bundles, in-store promotional material and market aides.





Figure 49: Follow the rum. Introduce innovative packaging (e.g. a sleeve for honey that protects it in tourists' luggage. Or a combination mini-sample pack.

2.10| **ANNEXES**

ANNEX: GLOSSARY OF TERMS

MGO	MGO honey refers to Manuka honey with a specific rating for Methylglyoxal (MGO), a powerful natural compound responsible for its strong antibacterial, antiviral, and anti-inflammatory properties. The higher the MGO number (e.g., MGO 500+, MGO 1000+), the higher the concentration of MGO and the stronger its medicinal benefits.
BPA	Bisphenol A (BPA) is an industrial chemical used to make polycarbonate plastics and epoxy resins, commonly found in food containers, beverage bottles, and inner linings of cans. Known as an endocrine disruptor, it can leach into food and beverages, potentially interfering with hormones. While some agencies deem low-level exposure safe, others advise limiting intake due to concerns over reproductive, metabolic, and developmental effects.
UMF	UMF™ is shorthand for the most comprehensive, independently certified and internationally recognised quality assurance system for New Zealand mānuka honey. It's designed to validate the potency, authenticity, purity, shelf life, and freshness of mānuka honey for honey producers, brands, customers, and consumers around the world. More at www.umf.org.nz
K factor	KFactor™ is a proprietary grading system used exclusively by Wedderspoon to verify the authenticity, raw, and unpasteurized nature of their New Zealand Manuka honey. It focuses on five key factors—traceability, non-GMO, raw/unpasteurized, free of antibiotics/glyphosate, and sourcing from New Zealand—rather than directly measuring specific bioactivity levels like MGO or UMF.
Mono-floral	Monofloral honey is produced primarily from the nectar of a single plant species, resulting in distinct flavours, colours, and aromas. These honeys, such as Manuka, Acacia, or Chestnut, often command higher prices due to their unique, intense characteristics, specialized production methods, and specific health benefits.

Multi-floral	Multiflora honey comes from bees collecting nectar from various flowers, creating a unique blend of flavours, colours, and nutrients, unlike monofloral honey from a single source. It's rich in antioxidants, vitamins, enzymes, and minerals, offering benefits such as immune support, digestive aid, and natural energy, and often has mild antibacterial properties. Each batch offers a distinct taste and composition due to its diverse floral origins.
Glyphosate Residue Free	Glyphosate is the world's most widely used herbicide. Bayer/Monsanto's Roundup herbicide is the world's top-selling weed killer. Its active ingredient is glyphosate. In 2015, the World Health Organisation's cancer agency, IARC, declared that glyphosate is a probable human carcinogen. Glyphosate is found in low-level residues on cereals, fruits, and vegetables. Glyphosate Residue Free certification verifies that food and supplement products contain no detectable residues of the herbicide glyphosate, or its metabolite AMPA. See more at https://detoxproject.org/certification/glyphosate-residue-free/certified-products/
Gluten free	Gluten is a family of structural proteins—primarily gliadin and glutenin—naturally found in wheat, barley, rye, and triticale. While harmless to most, it triggers severe immune reactions in people with celiac disease or gluten sensitivities. Pure honey is naturally gluten-free as it is produced from flower nectar without wheat, barley, or rye. While raw and unprocessed honey is safe, some commercial, blended, or flavoured honey may carry a risk of cross-contamination during processing
True Source certified	True Source Certified® is a voluntary, third-party certification program ensuring honey is ethically and legally sourced, traceable from hive to table, and compliant with U.S. and international trade laws. It combats illegal, adulterated, or mislabelled honey imports. Audits are conducted by NSF International. See more at https://www.nsf.org/ and https://www.truesourcehoney.com
Fairtrade	Fair trade is a global movement and trading system ensuring fairer prices, decent working conditions, and sustainable practices for producers, especially in developing countries, by prioritizing dialogue, transparency, and equity over traditional exploitative trade models, often seen through certifications like the Fairtrade Mark. It guarantees a minimum price (a safety net) and an extra "Fairtrade Premium" for community investment, empowering farmers and workers with better livelihoods and a stronger voice. More at https://www.fairtrade.net/en.html

ANNEX: FACTORS AND CONVERSIONS

From	To	Factor
kg	Liters	0.698
oz	Liters	0.02
lb	Liters	0.317

Source: https://www.aqua-calc.com/calculate/food-weight-to-volume

From	To	Factor	
GBP	G$	274.839	22-Jan-26
EU	G$	239.295	23-Jan-26
J$	G$	1.26131	27-Nov-25
US$	G$	203.969	27-Nov-25
SRD	G$	5.26521	27-Nov-25
TT	G$	29.5127	27-Nov-25

Source: www.oanda.com/currency-converter



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SECTION 3

BUSINESS MODELS



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3| **RUPUNUNI BEEKEEPING** – FACTS RELEVANT TO BUSINESS MODELS & ORGANIZATION.

Current honey production is rudimentary, and volumes are small. Rupununi beekeepers currently enjoy higher prices for their honey than in neighbouring Brazil, coastal Guyana, and some Caribbean markets.
The nature and community-based tourism (souvenir) market is untapped. It represents a high-value market with potential to deliver higher returns for local beekeepers.

The health-conscious consumer market and the market for ethical, fair-trade honey products, including those with therapeutic properties, remain untapped.
There is currently no certification system for honey produced in the Rupununi (unlike the situation in neighbouring Roraima State, Brazil).

Current Rupununi production is overwhelmingly sold locally in villages and then on the wider Rupununi market. The value chain is, for all intents and purposes, short and very underdeveloped.

In other markets, **'CONSERVATION HONEY'** (honey products associated with a protected or conservation area) find buyers in western markets at an average equivalent retail price of **G$11,686 per litre**, with a maximum of almost **$19,000 per litre, 2.6** and 4.3 times the average aspiration price of Rupununi beekeepers.

There are mixed feelings among beekeepers towards extensive collaboration, with more than a quarter of surveyed beekeepers thinking they can do better on their own, and 17% believing that working together can get complicated.

See the RLPA 2025/2026 Production Assessment and Market Assessment Reports for more details.



3.1| BUSINESS MODELS

Business models are designed to deliver value (propositions) for different customer segments (i.e. groupings of similar customers). Think of them as the essential building blocks of any business. The individual blocks need to fit together to form a robust whole.

From the RLPA 2025/2026 Honey Market assessment, there appear to be three distinct customer segments that are interested in, or potentially interested in, Rupununi honey.

1. **Price-Conscious Shopper**
2. **Nature & Conservation Tourists**
3. **Health-conscious buyers.**





Template used for business modeling

3.2| CUSTOMER SEGMENT: PRICE CONSCIOUS SHOPPER

KEY PARTNERS

Other beekeepers (knowledge, mentorship, some cost sharing)

GDLA (equipment, hives)

RLPA (certification, knowledge, equipment, hives)

(Optional: Community beekeeping groups - output growth, facilitation)

KEY ACTIVITIES

Source new colonies
Manage hives
Harvest and bottle honey
Attend sales events
Stock retailers and manage relationships



KEY RESOURCES

Hives
Beekeeping equipment
Honey house (or better, a mobile honey harvester)

VALUE PROPOSITION

Certified – this is real honey
Traceable to the Rupununi – know the origin.
Affordable – good value for authentic honey.

CUSTOMER RELATIONSHIPS

Product label
Face-to-face at events
Face-to-face with retailers.

CHANNELS

Beekeeper's home
Rupununi events
Rupununi retailers

CUSTOMER SEGMENTS

Rupununi adults
Coastal visitors (adults) to the Rupununi

Villagers - Adults

COST STRUCTURE

Packaging material
Transportation hires
(certification costs)

REVENUE STREAMS

Product sales

3.3| CUSTOMER SEGMENT: NATURE & CONSERVATION TOURISTS

KEY PARTNERS

- RLPA (Basic certification, standards & QA, knowledge sharing, post-harvest and marketing)
- Community beekeeping groups (output growth, facilitation)
- PAC (Protected area access and management)
- Village Councils (community conservation area access and management)
- GLDA (hives & equipment, R&D)
- Independent auditor

KEY ACTIVITIES

- Produce honey
- Certification of products
- Marketing & customer relations
- New product development
- Inventory management and product distribution

KEY RESOURCES

- Hives
- Mobile honey harvesting equipment.
- QA system
- Marketing & customer relations capacity
- Networks – logistics, etc.

VALUE PROPOSITION

- Nature's food comes from one of the most pristine landscapes on the planet.
- Pure goodness
- A piece of the Rupununi
- Memories
- The perfect gift
- Traceable, certified, wholesome.

CUSTOMER RELATIONSHIPS

- Website
- Social media
- Point-of-sale material
- Infomercials
- Ads -Airport arrivals
- Face-to-face at events
- Online store

CHANNELS

Rupununi eco-lodges
Gift & souvenir stores
Select events (expos, etc.)

GT upmarket hotels
International Airport Duty Free Store

CUSTOMER SEGMENTS

- Customer Segments
- Nature & community-focused international tourists to the Rupununi
- Coastal conservationists & NRM practitioners
- Domestic tourists to Rupununi
- International tourists

COST STRUCTURE

Honey production, Certification
Packaging
Marketing and logistics
Staff, office and inventory costs

REVENUE STREAMS

Product sales - honey
Merchandise – clothing, postcards, plush toys
Product sales – honey by-products and processed products (mead, mead iced tea, etc)

3.4| CUSTOMER SEGMENT: HEALTH-CONSCIOUS BUYERS

KEY PARTNERS

- RLPA (Basic certification, standards & QA, knowledge sharing, post-harvest and marketing)
- Research institutions (document flora, properties, therapeutic value
- Community beekeeping groups (output growth, facilitation)
- PAC & Village Councils (Protected area access and management)
- GLDA (hives & equipment, financing)

- Independent auditor

KEY ACTIVITIES

- Manage hives
- Harvest and bottle at selected sites and times
- Certification of products
- Marketing & customer relations
- New product development
- Inventory management and product distribution

KEY RESOURCES

- Hives
- R&D facilities
- QA system
- Marketing & customer relations capacity
- Networks – logistics etc.

VALUE PROPOSITION

- Therapeutic properties delivered by nature.

- From the bee to you: Unprocessed, raw, pure, unfiltered

- Independently documented therapeutic properties

- From pristine, untouched landscapes

CUSTOMER RELATIONSHIPS

- Website
- Social media

- Point-of-sale material
- Infomercials

- Online store

CHANNELS

- Rupununi eco-lodges
- Gift & souvenir stores
- Select events (expos etc)
- Pharmacies and health food stores
- GT upmarket hotels

CUSTOMER SEGMENTS

- Conservation & nature focused international tourists (EU origin especially)

- Domestic health conscious shoppers.

- Coastal conservationists & NRM practitioners

- Domestic tourists to Rupununi

- International tourists

COST STRUCTURE

Honey production & certification
Packaging
Marketing and logistics
Staff, office and inventory costs

REVENUE STREAMS

Product sales - honey
Product sales – honey by- and processed products

ORGANIZATIONAL FORMS

Organizational forms refer to the way in which beekeepers organize themselves. To some extent, it reflects the structure of the actors in the Rupununi, how they associate with one another, and how they are related. The intention of the organizational form is to deliver the business model(s), ultimately delivering the most value for customers and beekeepers, at the lowest cost.

There are different relevant organizational forms, made up of a combination of options, each with advantages, limitations, some degree of fit with the current attitudes of beekeepers, and with the market situation, and each requiring some degree of "stretch", change required to make the organizational structure work.

The way beekeepers are organized should ideally progress organically. Reflection among beekeepers, often stimulated by a "sector engine" (an organization that drives growth in the value chain), will identify challenges and opportunities that are better served by a different way of organizing (e.g. coming together as a group, formally, to get better prices for inputs). The way and extent to which beekeepers work together evolve over time.

Here we will consider four elements and their combinations:

1. **Sole beekeepers**
2. **Community beekeeping groups**
3. **A region-wide grouping of beekeepers**
4. **A sector engine**



3.5| INDEPENDENT BEEKEEPER

An individual beekeeper, working on his/her own or with family members or people otherwise employed by her/him.
Registered as a sole trader, a business name, or a limited liability company (less likely)

ADVANTAGES (THE UPSIDES OF THIS FORM)

- No shared responsibilities – each beekeeper is responsible for her/his operation in its entirety.
- No dependence on outside sources or on other beekeepers.
- Keeps effort and costs of collaboration to a minimum.

LIMITATIONS (THE DOWNSIDES AND DISADVANTAGES)

- Limits interaction with other beekeepers, and with this, opportunities for peer-to-peer support
- Limits access to resources from international donors, who almost always prioritize working with groups
- Slows sales and market penetration. Doesn't provide quality assurance, so poorly suited to reducing consumer anxiety about fake honey, and poorly suited to new beekeepers entering new markets (in which they have no reputation).
- Comparatively higher costs of business registration and compliance (accounts, audits, etc)
- Results in higher costs in some market channels, e.g. events, and as a result in higher product prices.
- Results in higher input costs (labels, bottles etc), and higher equipment costs (no economies of scale and no shared equipment), with resulting high end-product costs.

FIT (HOW WELL IT MESHES OR ALIGNS WITH CURRENT ATTITUDES AND MARKET SITUATION)

- Most beekeepers currently work in this way, so good alignment with the current production situation.
- Works well in situations when beekeepers prefer not to keep accurate records (production, financials, etc.).
- Serves small, dispersed village markets well (to the extent that there is a beekeeper in, or in a nearby village).
- Delivers low-cost honey to neighbours and villagers where packaging and labelling are not primary considerations.

STRETCH (WHAT AND HOW MUCH IS REQUIRED TO MAKE THIS TYPE WORK, GIVEN WHAT IS KNOWN IN "FIT")

- None required - this is how most beekeepers currently work.
- End products need to be positioned at comparatively higher price points to compensate for additional costs from foregone economies of scale.

SUMMARY

- Cost-effectively delivers honey within the village, where reputation can be easily built, and expectations of packaging and presentation are low.
- Does not generate any economies of scale and hence results in higher costs for the beekeeper, which must be passed on to the customer.
- Requires a higher price point in markets outside the village, which creates entry points for low-cost honey from other sources (e.g. Roraima state, Brazil), and for adulterated honey.

3.6| LOCAL BEEKEEPING GROUP

A group of beekeepers working together in a group. Members are either from one community or from a few nearby communities. Unregistered, or registered as a limited liability company, or a cooperative.

ADVANTAGES (THE UPSIDES OF THIS FORM)

- (Assumption: beekeepers tend to their individually owned hives)
- To the extent that beekeepers collectively purchase inputs and collectively market their honey, costs are reduced. More people and more collective action = lower costs.
- Good peer-to-peer support
- Good supporting network for new beekeepers.
- Lower costs (per beekeeper) of compliance (with GRA, NIS, etc.) if registered
- Comparatively low costs of meeting in-person.
- Some potential to leverage (smaller pots of) donor resources.

LIMITATIONS (THE DOWNSIDES AND DISADVANTAGES)

- Requires an ongoing investment of time and energy by each beekeeper in working together (meeting, finding consensus, accepting difficult collective decisions).
- Unlikely to generate sufficient capacity (in the near- and medium term) to access larger pots of resources.
- Inner group tensions will arise and threatened the group's viability.
- Slows sales and market penetration. Doesn't provide quality assurance, so poorly suited to reducing consumer anxiety about fake honey, and poorly suited to new beekeepers entering new markets (in which they have no reputation).
-

FIT (HOW WELL IT MESHES OR ALIGNS WITH CURRENT ATTITUDES AND MARKET SITUATION)

- Requires an ongoing investment of time and energy by each beekeeper in working together (meeting, finding consensus, accepting difficult collective decisions).
- Unlikely to generate sufficient capacity (in the near- and medium term) to access larger pots of resources.
- Inner group tensions will arise and threatened the group's viability.
- Slows sales and market penetration. Doesn't provide quality assurance, so poorly suited to reducing consumer anxiety about fake honey, and poorly suited to new beekeepers entering new markets (in which they have no reputation).

STRETCH (WHAT AND HOW MUCH IS REQUIRED TO MAKE THIS TYPE WORK, GIVEN WHAT IS KNOWN IN "FIT")

- To some extent, a beekeeper would need to be willing to give up some degree of independence.
- A core of qualified (and/or) experienced leaders with business skills.

SUMMARY

- If beekeepers can overcome the challenges of collaboration, costs (to the beekeeper) are lower than working alone.
- Better for growing the beekeeping fraternity organically: the community beekeeping group support new beekeepers to overcome early challenges.

3.7| REGIONAL BEEKEEPERS GROUP OR ASSOCIATION

An association or group of individual beekeepers from across the region, either in an existing body (like RLPA) or in a new organization (e.g. the Rupununi Beekeepers Association).
Registered as a limited liability company or a cooperative.

ADVANTAGES (THE UPSIDES OF THIS FORM)

- Even lower costs from a larger collective of beekeepers (more people, more collaboration, lower many cost blocks)
- Good access to many donors and to larger pools of financing.
- In the case of an established organization like RLPA, beekeepers benefit from established processes, reputation, branding, and assets of the organization.
- Some degree of independence from honey production could allow the organization to provide quality assurance to some customer segments.
- Best placed to facilitate third-party quality assurance systems.

LIMITATIONS (THE DOWNSIDES AND DISADVANTAGES)

- Higher costs of in-person action (meeting, providing peer-to-peer support).
- Somewhat removed from the production base, so less suitable for seeding and mentoring new beekeepers.
- In the case of an existing organization, beekeepers inherit any "dirty laundry" that organization hasn't washed!
- In the case of a new organization, high start-up costs both directly (registration, basic equipment and supplies for administration) and indirectly (meetings, consensus building).

FIT (HOW WELL IT MESHES OR ALIGNS WITH CURRENT ATTITUDES AND MARKET SITUATION)

- No major benefit for supplying the village market.
- Potentially improves access to new markets, but only when production generates a surplus exceeding village demand.

STRETCH (WHAT AND HOW MUCH IS REQUIRED TO MAKE THIS TYPE WORK, GIVEN WHAT IS KNOWN IN "FIT")

- Requires following procedures, standards and guidelines that you may not have had a hand in developing.
- Requires some investment in collaboration and surrender of independence to maximize benefits.

SUMMARY

- Combines some benefits of the sole beekeeper and the local group model.
- Significantly, not well placed to cost-effectively grow beekeeper numbers because, on its own, it doesn't create the local support networks start-up beekeepers need to thrive

3.8| SECTOR ENGINE

An existing organization that is not directly involved in beekeeping or honey production. Ideally, a member-based organisation at a regional (ideal) or national scale (less effective).
Acts as a support partner to Rupununi beekeepers.
Registered as a not-for-profit limited liability company or a cooperative.

ADVANTAGES (THE UPSIDES OF THIS FORM)

- (Assumption: beekeepers tend to their individually owned hives)
- Independence from the day-to-day of beekeeping allows this organization to mediate between beekeepers (and other value chain actors) and foster collaboration.
- Focused on facilitating growth, access to markets and efficiencies for all.

LIMITATIONS (THE DOWNSIDES AND DISADVANTAGES)

- Cannot, on its own, efficiently drive growth in beekeeper numbers.

FIT (HOW WELL IT MESHES OR ALIGNS WITH CURRENT ATTITUDES AND MARKET SITUATION)

- Requires an ongoing investment of time and energy by each beekeeper Good fit to grow the sector. In the case of RLPA, it already has transferable experiences and assets.

STRETCH (WHAT AND HOW MUCH IS REQUIRED TO MAKE THIS TYPE WORK, GIVEN WHAT IS KNOWN IN "FIT")

- In the case of RLPA, it requires the transfer of capacity from poultry to the honey value chain.
- Requires expanded human resource capacities and sustained strong leadership.
- Requires capacities to lead multi-stakeholder platforms and a broad partnership portfolio (including with GLDA, PAC, research institutions).

SUMMARY

- A Rupununi-based sector engine could accelerate the growth of beekeeping in the Rupununi by harmonizing many of the benefits of the organizational forms described on previous pages (see schematic below).

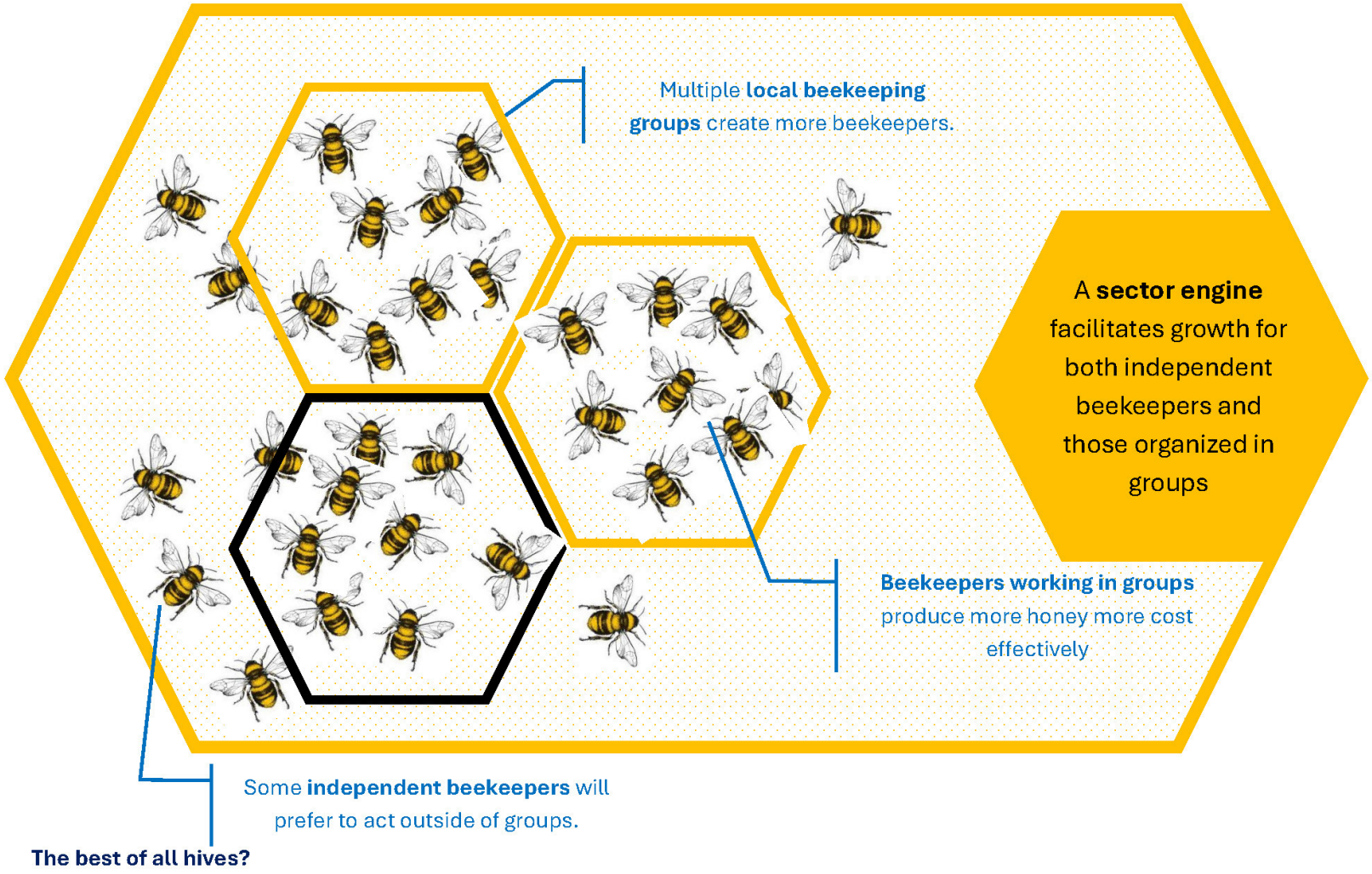


Figure 1: A loose consortium of beekeepers and beekeeping groups (left) are responsible for producing honey products, while an enabling consortium of organizations creates a conducive environment for growing the sector & beekeeper income. Here with RLPA as sector engine.

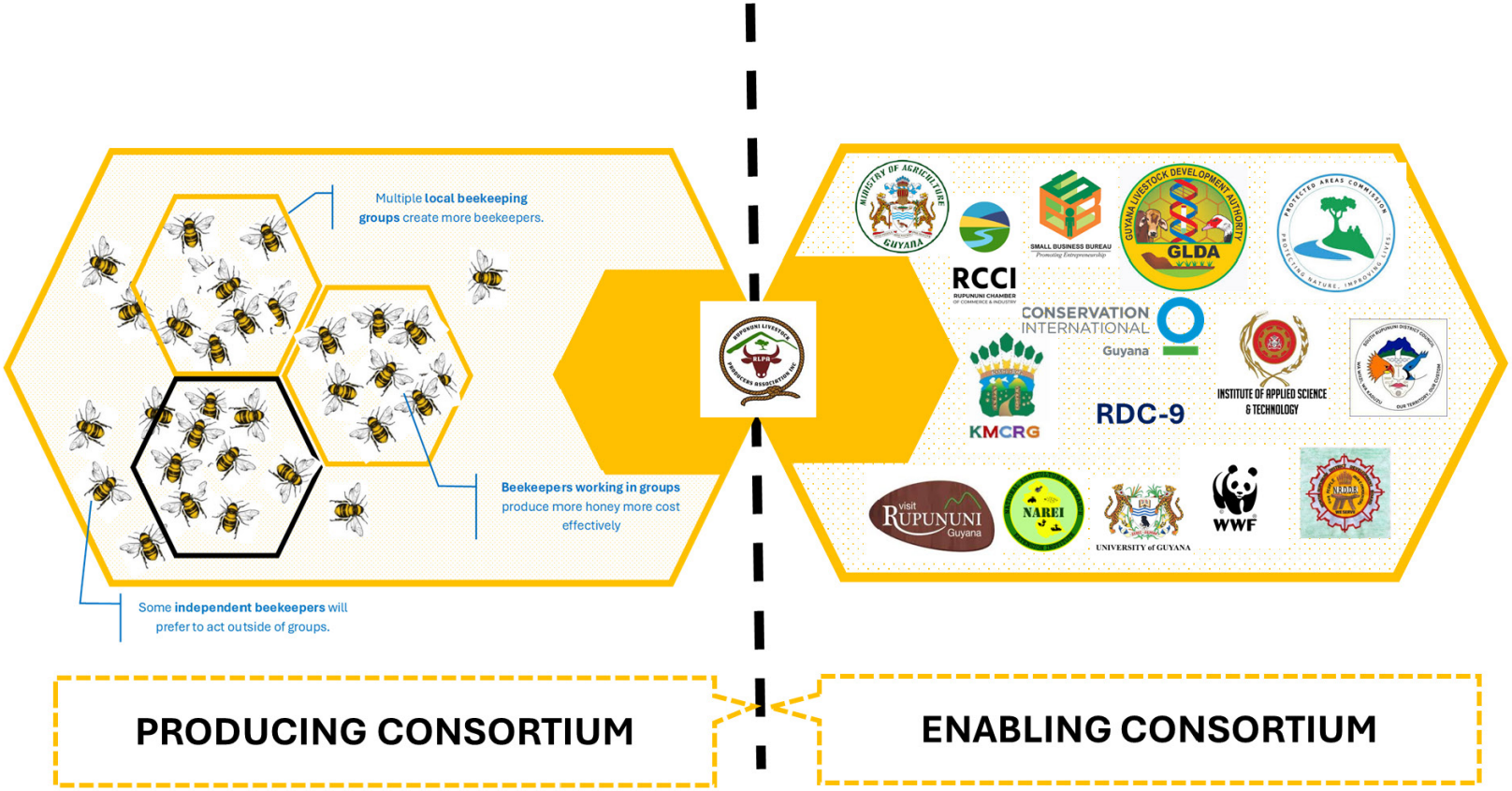


Figure 1: A loose consortium of beekeepers and beekeeping groups (left) are responsible for producing honey products, while an enabling consortium of organizations creates a conducive environment for growing the sector & beekeeper income. Here with RLPA as sector engine.

3.9| RECOMMENDATIONS

Work towards a hybrid of localized beekeeping groups and a sector engine; some beekeepers will choose to remain independent (i.e. outside of groups).

This hybrid model attempts to capture the best of all organizational forms.

1. Individual beekeepers, working independently, but ideally predominantly in groups, maximize the production of honey.
2. Localized beekeeping groups encourage and support new beekeepers and progressively grow the overall number of beekeepers in the region. This multiplies the effect on overall production by expanding the number of beekeepers.
3. A strong sector engine advances sustainable growth through standards, certification, markets, research and development. It works in close collaboration with partners to deliver an enabling environment.

Let this hybrid evolve as organically as possible.
Particularly, the transition from independent beekeepers to beekeeping groups will take time and may reverse course periodically. Ultimately, individual beekeepers need to sense that the benefits of collaboration outweigh the costs.

Keep room for independent beekeepers.
As a result, work with independent beekeepers if, when and where this is their preferred way of organization. Do not discourage independent beekeepers or restrict their access to services.

Provide incentives for groups that grow their membership.
Whenever possible, provide incentives (but not preferential treatment) for groups that generate new beekeepers and sustain their interest through the rough start-up phase of their beekeeping operation.

Consider the recommendations of both the RLPA 2025/2026 Production Assessment and Market Assessment Reports.
Additional actions are necessary to encourage beekeepers to consider changes to the way they currently organize themselves.



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ABOUT THE SFL PROGRAMME

THE PROJECT

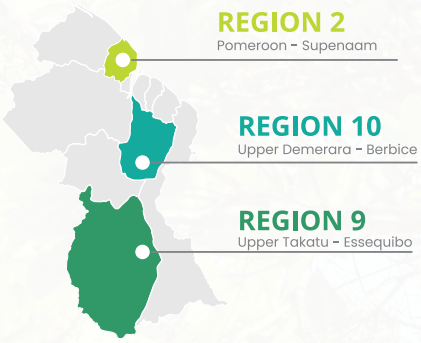
The Sustainable Forest Livelihoods for Communities in Suriname and Guyana (SFL) project will contribute towards the Guianas maintaining its high forest/low deforestation status, and therefore also the best remaining global opportunity to conserve continuous tracts of intact forest.

The SFL project will take an integrated and sustainable approach to landscape management and livelihood development, ensuring better conservation and sustainable use of natural resources. The intervention will focus on:

1. Strengthening the Indigenous and Local Communities' capacity to implement a solid framework for integrated landscape management and natural resource management.
2. Developing sustainable livelihoods based on cultural and traditional knowledge and sustainable landscape use.
3. Developing sustainable financial mechanisms for forest conservation.

GEOGRAPHIC AREA

Areas being considered for the intervention



FUNDING

5 MILLION EUROS

DURATION

4 YEARS

2023-2027

Including a nine-month Inception Phase

Funded by the European Union

In partnership with RÉPUBLIQUE FRANÇAISE Liberté Égalité Fraternité AFD AGENCE FRANÇAISE DE DÉVELOPPEMENT

Execution WWF



NOTES

SFL | Sustainable Forest Livelihoods

our roots | our tomorrow

