



SGP The GEF Small Grants Programme



ECS Organisation of Eastern Caribbean States



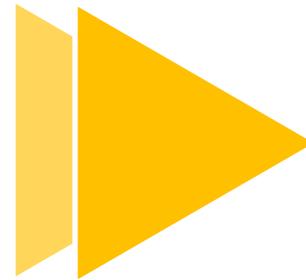
BioSPACE



# Economic Scoping Study- Estimating the potential value of Apiculture to Economies of the Eastern Caribbean States

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February 2023



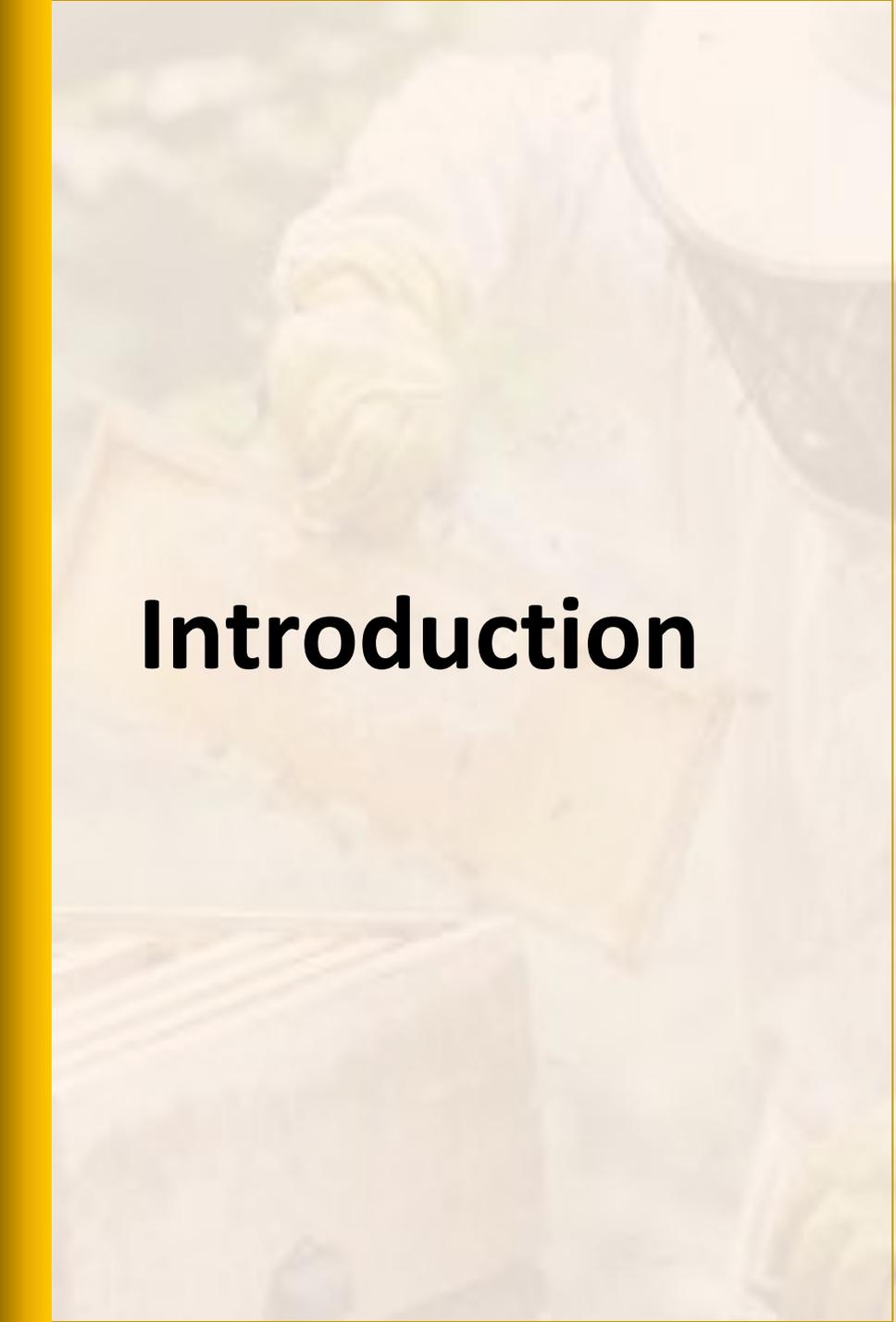
**Presented By:**

*Ms. Joanne Husbands and  
Ms. Brodi Louis - CYEN*



Food and Agriculture Organization of the United Nations





# Introduction

## **What is the project?** (Project scope)

This consultancy was assigned to estimate the economic value of the apiculture industry in Eastern Caribbean States (ECS), including St. Lucia, St. Vincent, Dominica, Grenada, St. Kitts, and Antigua and Barbuda.



# Introduction

## PURPOSE:

The purpose of this study was to conduct an economic valuation of the apiculture industry in Dominica, St. Lucia, Antigua and Barbuda, St. Kitts and Nevis, St. Vincent and the Grenadines and Grenada, and to propose a methodology for evaluating the ecosystem services provided by the apiculture industry in the respective countries.

# Introduction

The OECS Economic Scoping Study report includes:



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**5-6**

# Introduction

The OECS Economic Scoping Study report includes:

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- **Section Two:** Market analysis of global honey production, trade, and consumption to identify growth opportunities.

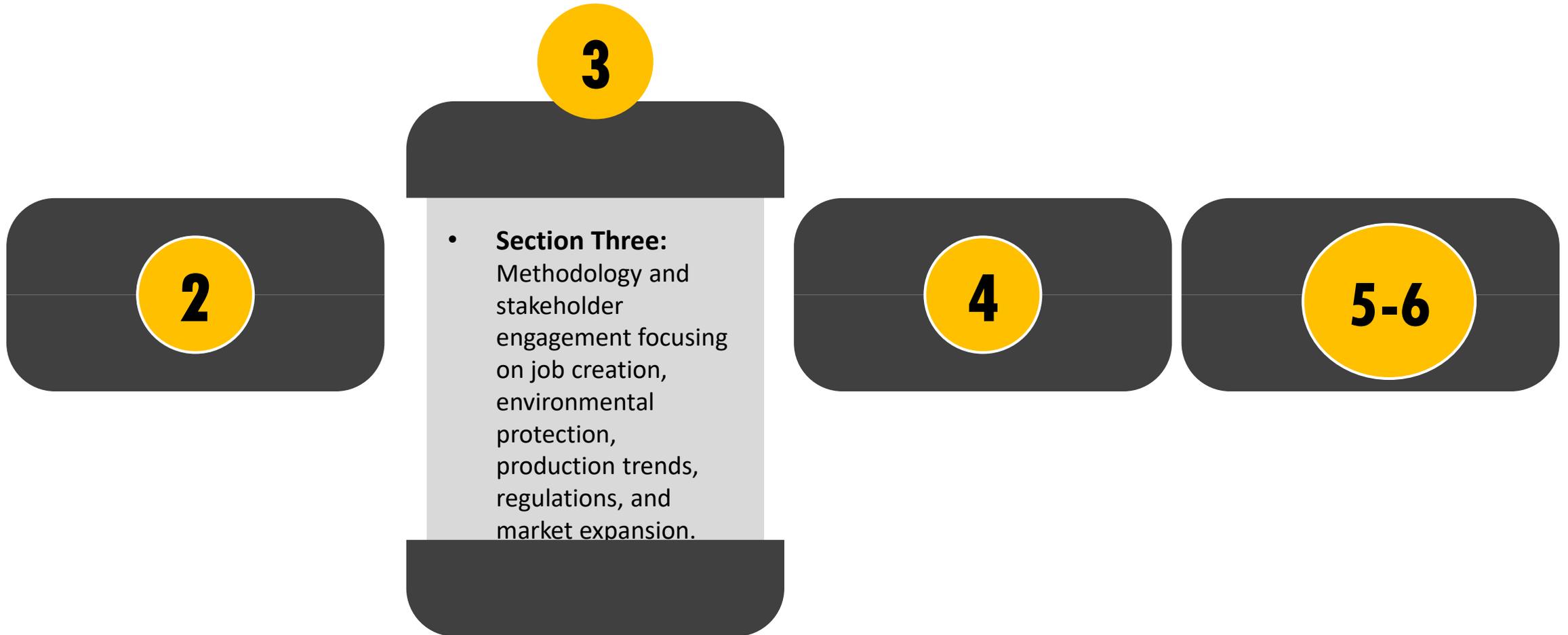
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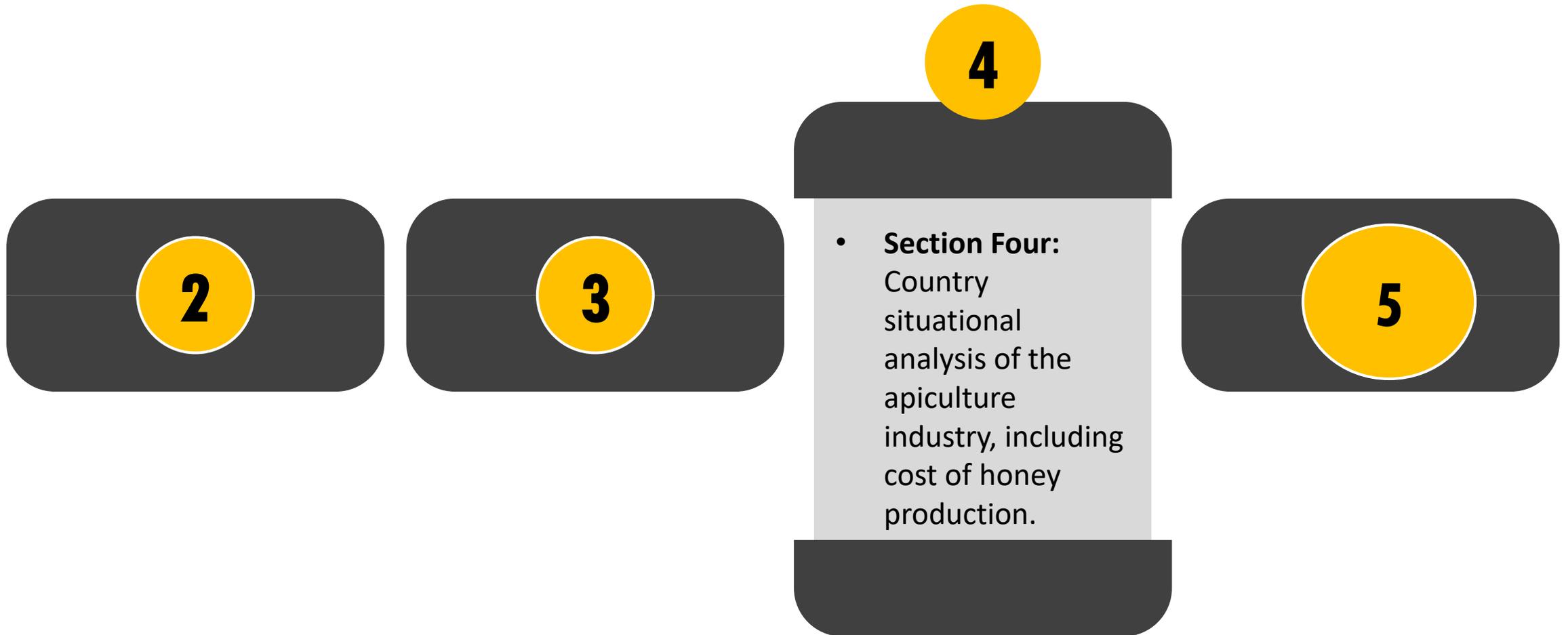
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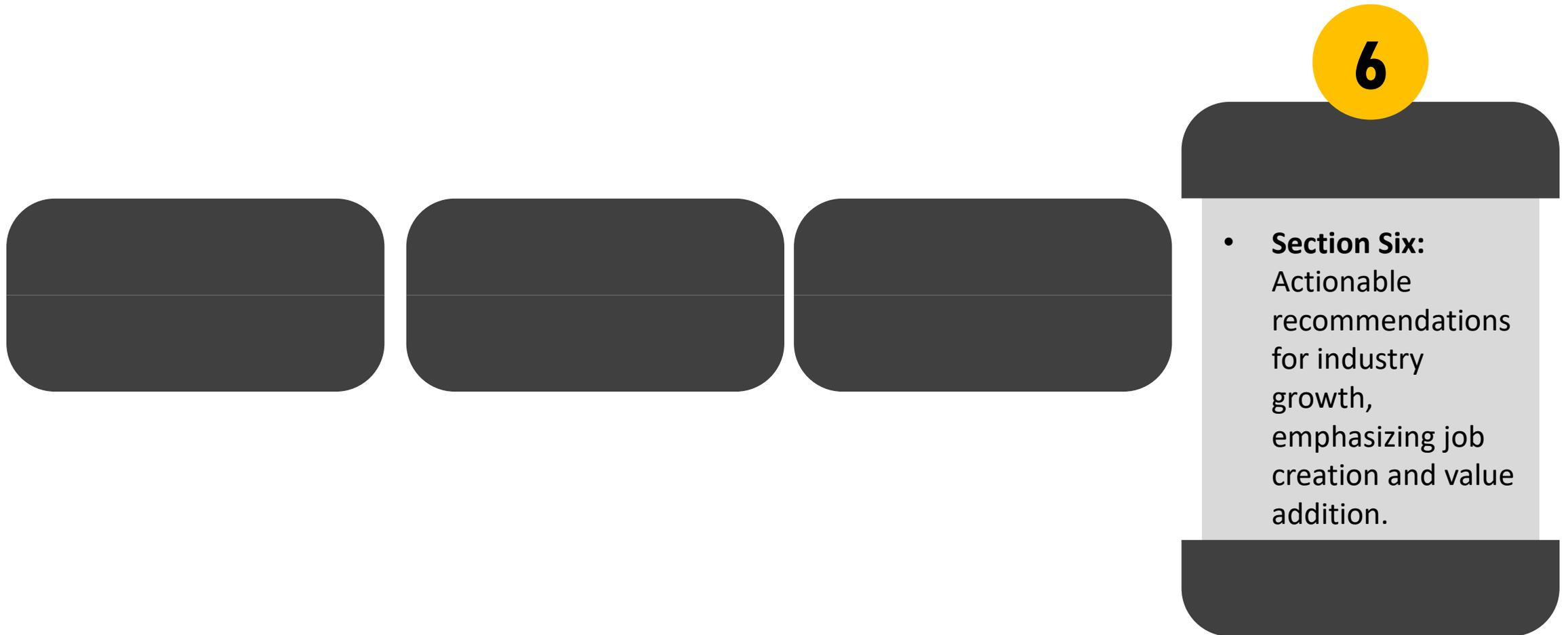


# Four Key Points to consider

5

- **Section Five:** Economic estimation results and a proposed methodology for evaluating ecosystem services provided by honeybees, concluding with a NOISE analysis.

# Four Key Points to consider



# Introduction



## OBJECTIVES:

The main objective of this study was to establish a baseline of the industry with respect to issues of:

- **economic contribution**
- **job creation (women and youth)**
- **environmental protection**
- **production trends and potential for productivity increases,**
- **industry regulations and supporting environment**
- **value addition and income generation opportunities.**

The results of the study and the recommendations presented are intended to inform the development of policy to advance the apiculture industry.

# Global Market Analysis for Natural Honey (HS0409)

Global Production of Natural Honey per Region

Source: FAOSTAT

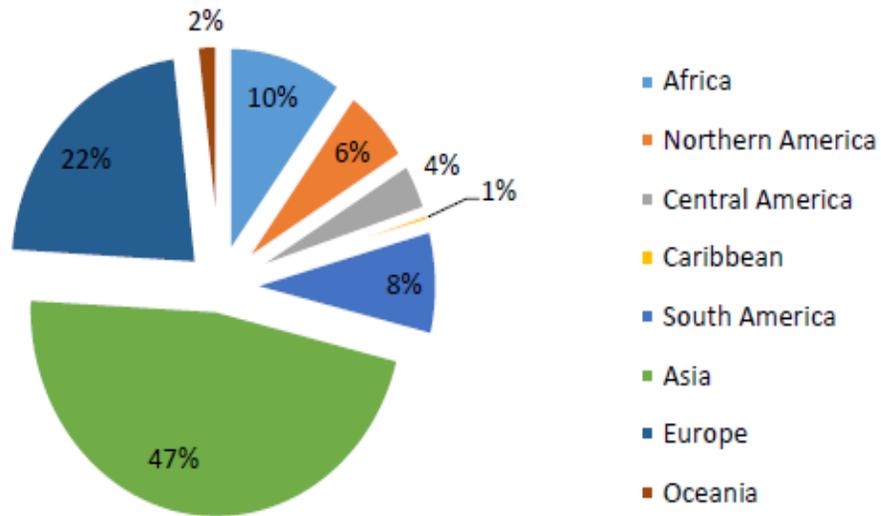


Figure 3: Global production of natural honey per Region

Global Natural Honey Production (2013-2021).

Source: FAOSTAT

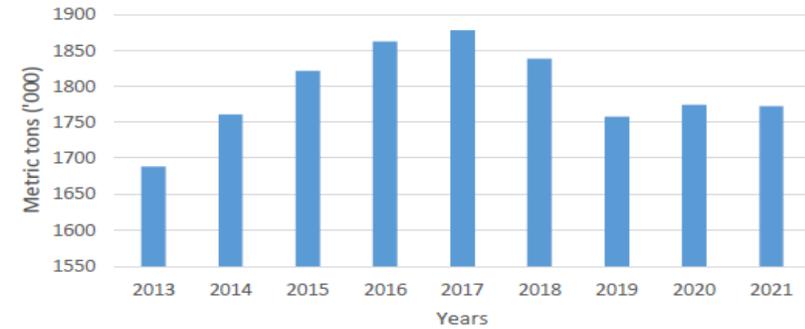


Figure 1: Global production of natural honey (HS 0409)

Global Gross Production Value of Natural Honey 2013-2021)

Source: FAOSTAT

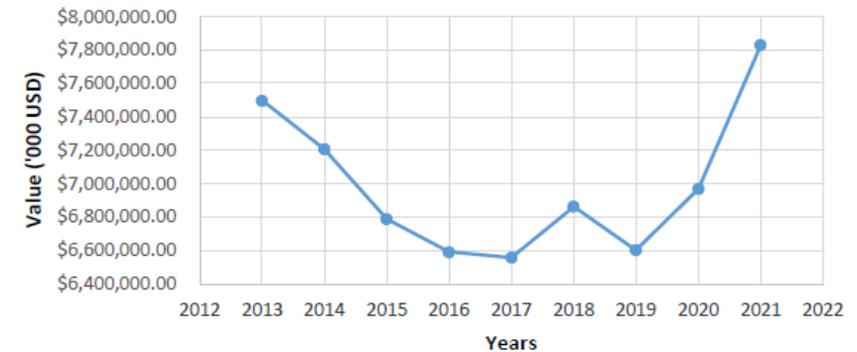


Figure 2: Global gross production value of natural honey (HS 0409)

# Major Exporters and Importers of Natural Honey

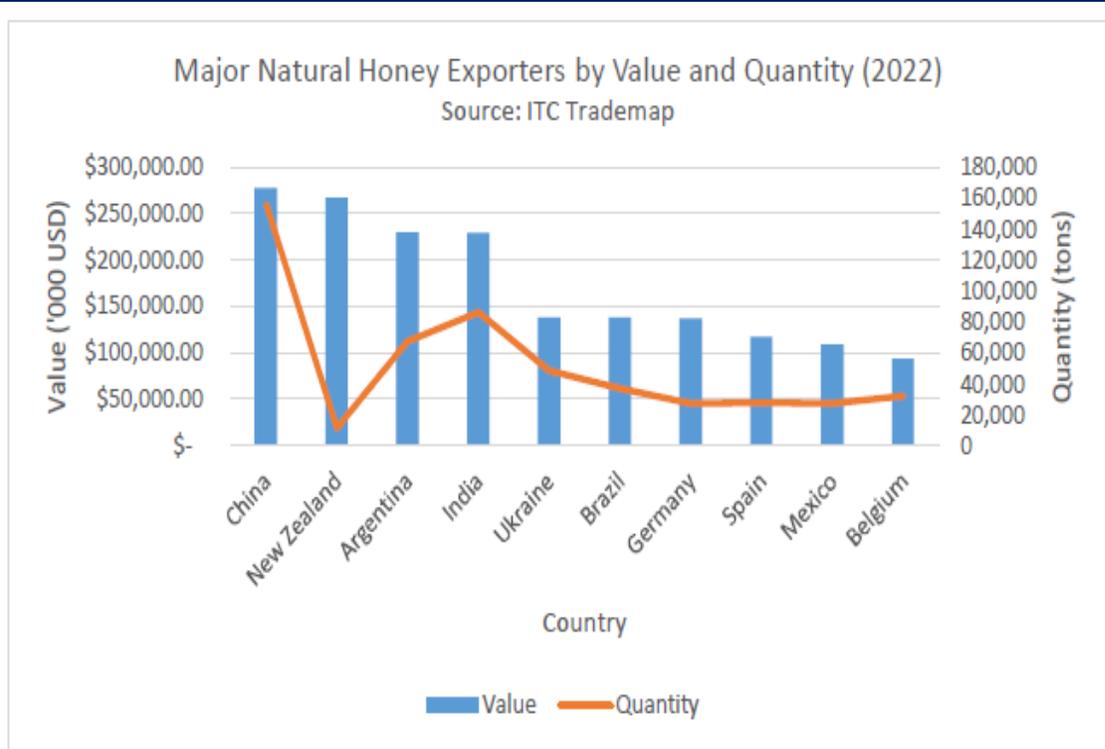


Figure 4: Major Exporters of Natural Honey by value and quantity

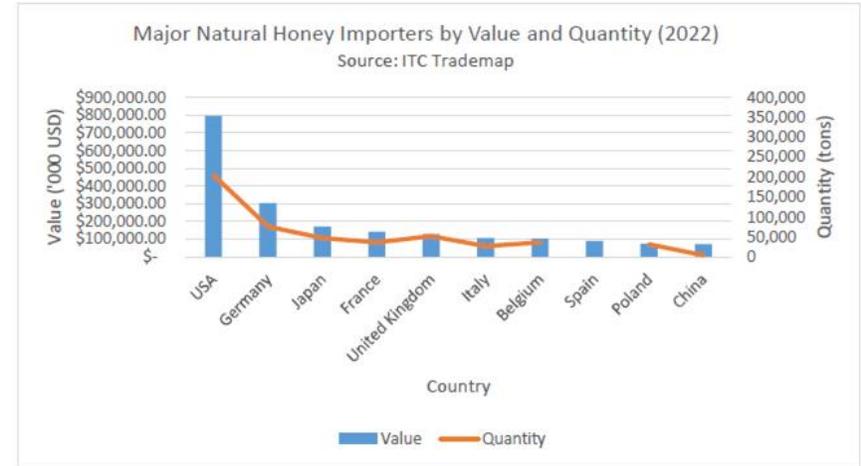


Figure 5: Major honey importers by value and quantity in 2022.

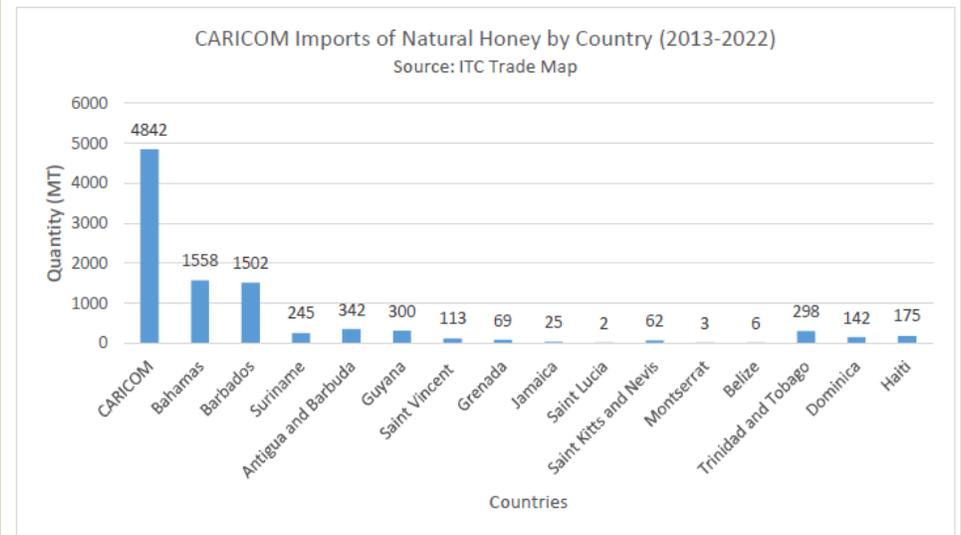
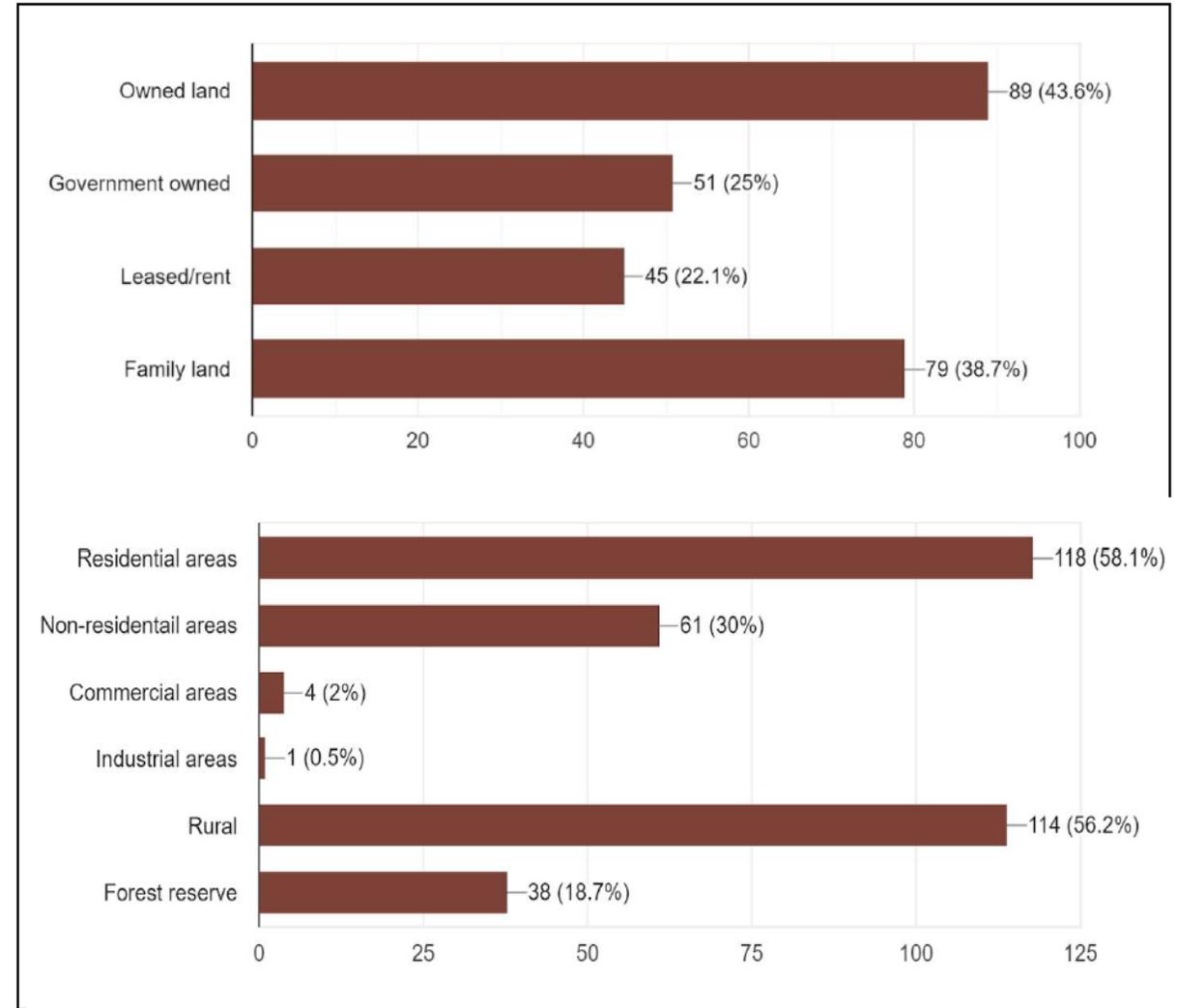


Figure 6: CARICOM imports of natural honey by country (2013-2022)

# RESULTS AND FINDINGS

The apiculture industry in the region, covers many island's focuses and opportunities for job creation (especially for youth and women), constant environmental changed, production trends, regulations, value addition, income opportunities, and market expansion potential. Most beekeepers operate on private (43.6%) or family land (38.7%), while others use government (25%) or leased land (22.1%), often influenced by access to bee forage and crop pollination benefits.

Some beekeepers also earn income from renting hives for pollination, despite no formal market for such services. Most honey is sold directly at the farm gate, with limited retail and hotel sales, and minimal exports (<3%). No honey is sold to agro-processors. Value addition mainly involves beeswax. Annual operating costs range from XCD 10,000–20,000, primarily for supplies, protective gear, and labor. Limited access to inputs and affordable financing remains a major barrier, especially for new entrants.



# KEY FINDINGS

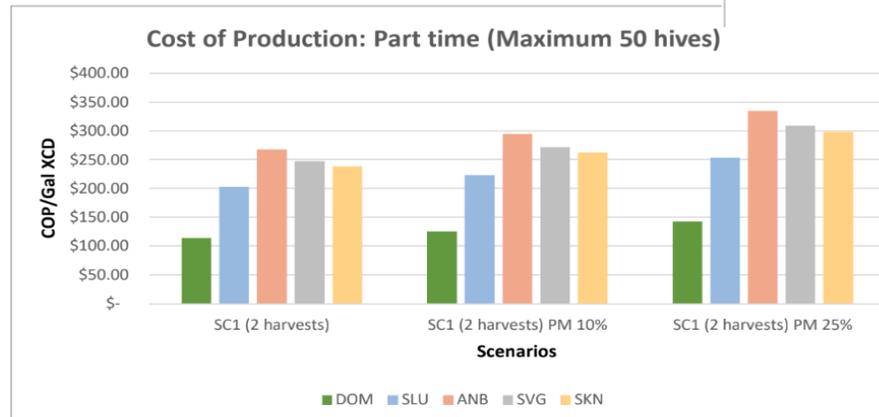
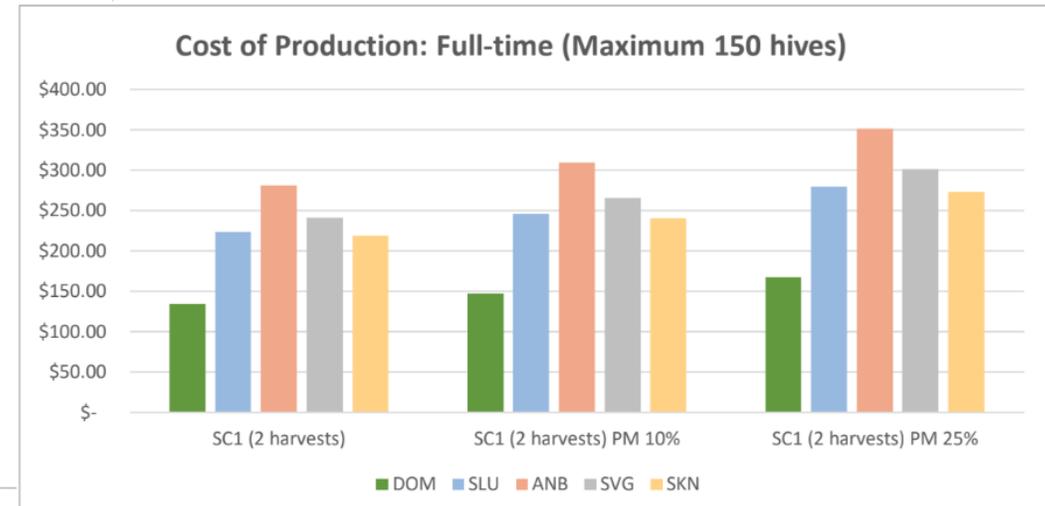
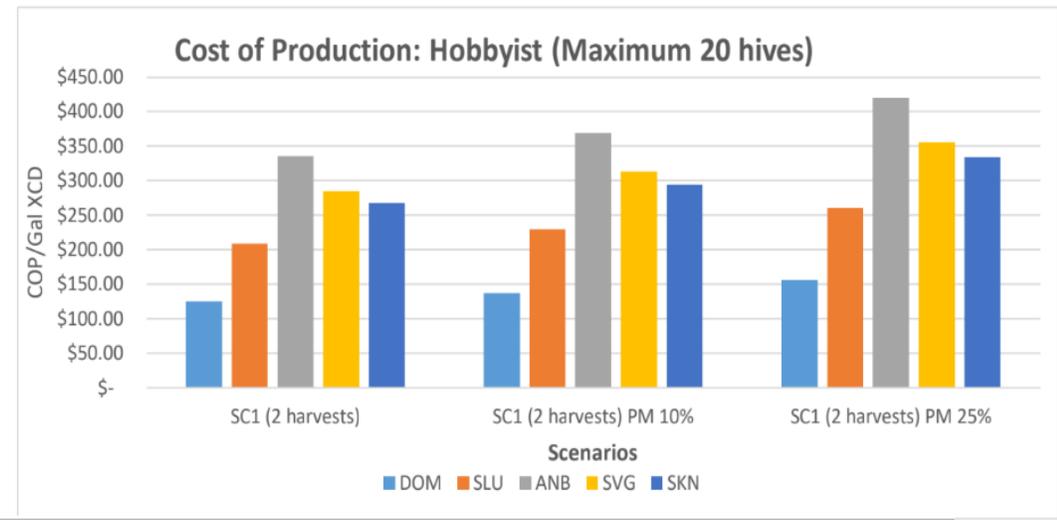
## Honey is the main product of the apiculture industry across the region.

While various types of honey are produced, there is little market differentiation or profiling based on nectar sources. Prices vary widely between countries, and consumers—especially locally and in the diaspora—prefer local honey. However, limited data on production costs makes it difficult to assess the link between pricing and profitability. Importantly, cost of production estimates should be interpreted with caution, as they vary by individual beekeeper.

Country	Farm gate price (XCD)				Wholesale price/US gallon (XCD)	Average unit prices of imported honey over last decade (XCD/MT)***	Quantity Imported over last decade (MT)
	Lowest farm gate price (750ml)	Lowest price in US gallons*	Highest farm gate price (750ml)	Highest price in US gallons*			
St. Lucia	\$60	\$300.6	\$80	\$400.8	\$200	\$8,150.7	3**
Dominica	\$60	\$300.6	\$100	\$501	\$200	\$5,037	146
Antigua and Barbuda	\$80	\$400.8	\$125	\$626.26	\$400	\$7,006	197
St. Kitts and Nevis	\$100	\$501	\$125	\$626.25	\$480	\$6,300	257
Grenada	\$25	\$125.25	\$90	\$450.9	Not available	\$7,414	69
St. Vincent and the Grenadines	\$50	\$250.5	\$70	\$350.7	\$500	\$12,487	113

\* 1 US Gallon = 3785.41ml = 5.01 (750mls)  
 \*\* Data represents 2012 and 2013 only, owing to restrictions on the importation of honey  
 \*\*\* 1 Metric Ton = 183.82 US gallons

Antigua and Barbuda recorded the highest cost of production across all enterprise types, mainly due to lower yields and high input costs. Dominica had the lowest COP overall, driven by higher yields from abundant bee forage. In the hobbyist and part-time categories, Dominica and St. Lucia had the lowest COPs respectively, while in the full-time category, Dominica and St. Kitts and Nevis reported the lowest costs.



# Key Highlights.

## Antigua and Barbuda

- 50 beekeepers managing 600 hives; Barbuda produces unique logwood honey.
- Leading honey importer in the ECS (197 MT annually, valued at USD 591,000).
- Local honey farm gate price ranges from XCD 80–125 per 750ml.
- Challenges: High praedial larceny, lack of regulations, and weak collective action.
- Opportunities: Trademarking local honey, expanding production, and leveraging regional demand.

## Dominica

- Rich tropical forest cover (63.8%) provides abundant forage for bees.
- Approximately 120 beekeepers managing 750 hives; honey farm gate price ranges from XCD 60–100 per 750ml.
- Imports 146 MT of honey annually, valued at USD 91,000.
- Challenges: Lack of government prioritization, high pesticide usage, and weak collective action.
- Opportunities: Integrating apiculture into food security strategy and leveraging local demand for honey.

## St. Vincent and the Grenadines

- 80 beekeepers managing 750 hives; honey farm gate price ranges from XCD 50–70 per 750ml.
- Imports 113 MT of honey annually, valued at USD 491,000.
- Challenges: Low hive productivity, high pesticide usage, and lack of insurance for beekeepers.
- Opportunities: Agro-tourism potential, increasing production, and achieving self-sufficiency in honey.

## St. Lucia

- Most advanced apiculture industry in the ECS, integrated into the Ministry of Agriculture's master plan for livestock development.
- Approximately 245 beekeepers managing 4,000 hives, contributing XCD 2 million annually.
- No honey imports; strong local demand for pesticide-free honey.
- Challenges: Weak collective action, low hive productivity, and high pesticide usage.
- Opportunities: Honey processing plant, regional export potential, and honey profiling.

## St. Kitts and Nevis

- 25 beekeepers managing 250 hives; honey farm gate price ranges from XCD 75–125 per 750ml.
- Imports 256,572 kg of honey annually, valued at XCD 1.615 million.
- Challenges: Lack of targeted government support, high praedial larceny, and weak enforcement of regulations.
- Opportunities: Organic honey production, leveraging pesticide-free zones, and expanding apiaries in Nevis.

## Grenada

- 40 beekeepers managing 2,700 hives; honey farm gate price ranges from XCD 25–90 per 750ml.
- Imports 69 MT of honey annually, valued at USD 181,000.
- Challenges: Lack of training, absence of quality standards, and weak collective action.
- Opportunities: Mobilizing idle lands for apiculture, increasing production, and exploring export markets.

# RECOMMENDATIONS

To unlock the full potential of the industry, a coordinated and strategic regional approach is essential. Some recommendations to allow for this would include:

- **Develop a regional apiculture policy tailored to national contexts**, balancing environment, livelihoods, and economic goals.
- **Invest in bee ecology research and support partnerships** with academic institutions (e.g., UWI).
- **Raise public awareness** on the ecological importance of honey bees and sustainable beekeeping practices.
- **Strengthen beekeepers' organizations** for collective marketing, training, and input supply.
- **Establish a regional database** to track production and inform policy.
- **Expand honey shows** as platforms for public engagement and research sharing.
- **Set honey standards and testing protocols** to ensure quality, support market access, and manage disease and pest risks.

thank you

CARIBBEAN YOUTH ENVIRONMENT NETWORK



UNITY STRENGTH PURPOSE

