Honey and Geographical indications:
Why is honey a good pilot product
for the implementation of Geographical Indications labeling in Ethiopia ?

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This paper scrutinizes the opportunities and challenges of honey as a potential pilot product for the forthcoming implementation of Geographical Indications labeling for local specialty products in Ethiopia.

1. Geographical Indications : definition and opportunities

Geographical Indications designate products that have a specific geographical origin and possess qualities, characteristics or a reputation that are essentially due to that place of origin. Famous Geographical Indications include for example "Darjeeling tea" from India, "Coffee from Colombia", "Champagne" sparkling wine from France. The registration of Geographical Indications protects the name of the product, and serves as a collective marketing tool for the producers and processors of the regional product. Famous local origin products exist since many centuries in many parts of the world: the name of given places have long become synonymous of distinctive quality products such as regional incense, marble, olive oils, wines and others. However, the official registration and commercial protection of such famous names began in Europe in the 20th Century. Geographical Indications gained worldwide recognition as an Intellectual Property Right by the World Intellectual Property Organization (WIPO) and the World Trade Organization (WTO). According to WTO, Geographical indications (GI) are *"indications which identify a good as originating in the territory of a [country], or a region or locality in that territory, where a given quality, reputation or other characteristic of the good is essentially attributable to its geographical origin»* (WTO/ TRIPS, 1994, Article 22). A WIPO survey in 2017 revealed the existence of 42,527 protected GIs worldwide (WIPO, 2017: 204). African countries are increasingly active in implementing Geographical indications. Within this international context, Ethiopia - a country rich in diverse ecologies and production know-how for agriculture and handicraft- is currently willing to establish a legal framework for GI, and to implement GI labeling on at least one pilot value chain.

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Geographical Indications (GI) establish and formalize the existence of a unique link between "Place, People and Product" (FAO-SINERGI 2010). For this category of products, natural and human factors concur to obtain distinctive product characteristics. Honey is a good example of such local specialty products (see Figure 1) : The place, or production area, enhances the product's quality, characteristics or reputation due the local vegetation, altitude, soils and climate; and the people have developed a know-how to master extraction, maintenance and processing, as well as trading and consuming skills.

Figure 1: Geographical Indications: Specific links between Place, People and Product

In many countries, GIs have become a tool for rural development policy because of their capacity to simultaneously protect, promote and organize the value chains of specific products. First, GIs protect both producers and consumers by conferring a non-exclusive right of use of the name to all individual producers who are complying with the product specification (namely, producing within a delimitated area and following the appropriate production and processing practices). Second, GIs promote the uniqueness of these local products, thereby highlighting their reputation and stimulating premium prices. Third, GIs enhance value chain organization through the establishment, monitoring and control of the product specifications.

The potential of Geographical Indications for Ethiopia

Ethiopia is one of the world's origin zones for cultivated plants, and is richly endowed with ecological, biological and cultural biodiversity? It enjoys a wide diversity of high-quality regional products: coffees, tef (*Eragrostis tef*), sesame, butter, honeys… However, no "Geographical Indication Act" is yet in place. The recognition of regional quality products, such as the Ethiopian fine coffees initiative (2006), has so far been managed through the trademark law. Yet this legal framework is facing several limitations. It excludes most geographical names, which are descriptive and cannot be used for collective trademarks, but which could serve as GIs under the WTO definition. A new effective domestic legal framework is therefore needed in the interest of producers and in compliance with Ethiopia's current process of accession to WTO membership (Hirko, 2014). Before obtaining adequate international protection, national GI recognition must be granted at home.

The Ethiopian government and House of People's representatives therefore support the preparation of a new framework for legal registration and operational implementation of Geographical Indications. A feasibility study was conducted in 2018 with the participation of the Ethiopian Intellectual Property Organization (EIPO) and of several national Ministries and Agencies, and with the support of the French Development Agency (AFD), for a project on "Support to the definition of a Legal Framework for Geographical Indications in Ethiopia and Implementation on a pilot Value Chain" (CIRAD-ECOCERT, 2018).

2. Honey in Ethiopia: Quality local specialty products

Honey was one of the five products under review by the Geographical Indications project feasibility study. The screening criteria included the technical feasibility –i.e., the distinctiveness of regional products and their links to the local natural and human factors, as well as their controllability-, the commercial feasibility –i.e., the market trends and willingness to pay for specialty products- and the organizational feasibility –i.e., the value chain dynamism and structuration.

21. TECHNICAL DIMENSION

Ethiopia has a very old skills and widespread tradition of beekeeping (ATA 2016). Until today, it is estimated that one out of ten rural households keep honeybees. Honey is the basis of the traditional and popular fermented drink *tej*. According to the Ethiopian Apiculture Board (EAB), Ethiopia counts with about 10 million bee colonies which makes it the nation with the highest bee density in Africa. Total honey production in the country is estimated in 48 000 TM (vs. 28 000 TM in 2001), and the large proportion of wild bee colonies means that only a part of the honey is currently harvested. Honey plays an important role in rural households' food security, and also in income generation, mostly for domestic or commercial *tej* brewing. Honey accounts 1.3% of agricultural GDP.

Honey also relates strongly to natural factors, since it is a highly environmental-sensitive product, reflecting the place's vegetation, flora biodiversity and climate. Out of the complete Ethiopian flora of Ethiopia of 6000-7000 species, 500 species (400 herbs and shrubs, and 100 trees) have been shown to be important to bees (Flichtl and Adi, 1994). Regional states like Oromia, Amhara, Southern Nations, Nationalities and People's Region (SNPPR), Tigray, Benishangul Gumiz and Gambella, have intense apicultural activity and further potential for increasing collected volumes. Some honey types are well established, such as Tigray white Honey (Wukro area); Lalibela honey ; Masha Bonga honey; Yayu forest honey; and Wonchi Volcanic honey, among others.

A physico-chemical characterization of Ethiopian honeys has been conducted on samples collected from 16 famous producing areas nationwide (Abera et al., 2017). This study has shown that different producing regions are linked with distinctive honey characteristics and with different dominant flora. The monofloral honeys identified were *Acacia, Becium grandiflorum, Croton macrostachyus, Eucalyptus globulus, Hypoestes, Leucas abyssinica, Schefflera abyssinica, Syzygium guineense* and *Vernonia amygdalina,* with a level of floral dominance ranging from 59.8 to 90.3%. Although further characterization work remains necessary, these results show the potential for geographical indications in honey.

Honey production in Ethiopia is present almost nationwide, with a good balance among federal States (Figure 2).

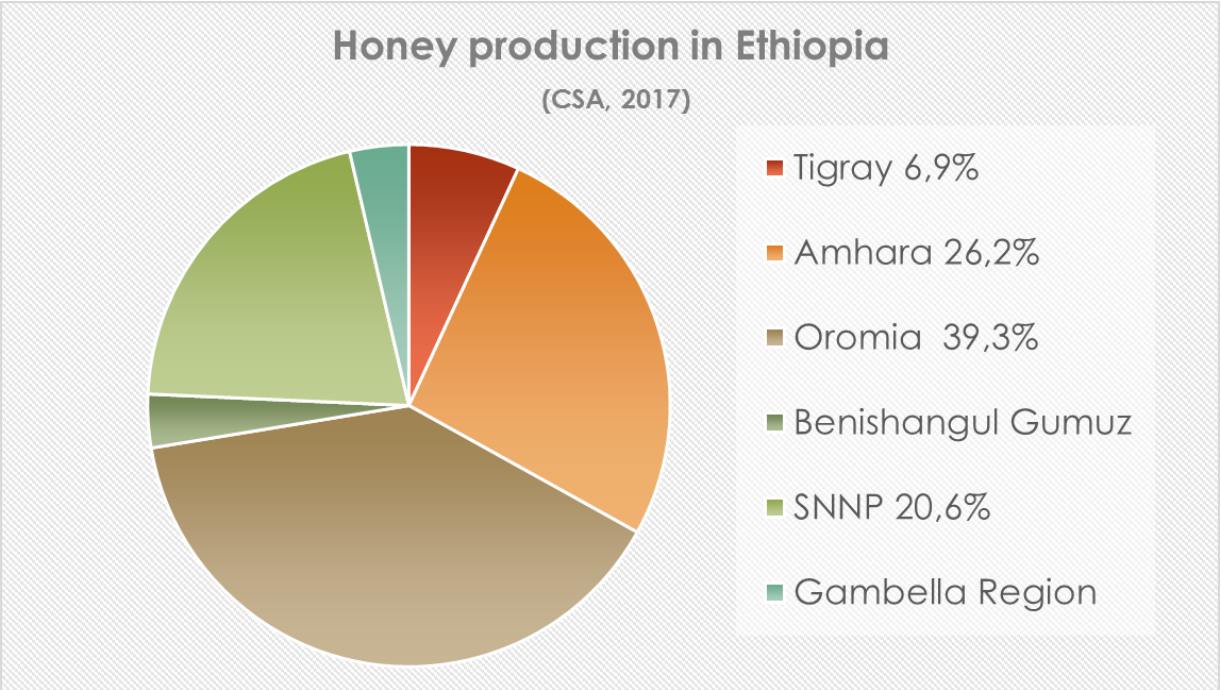

Figure 2: Honey Regional production in Ethiopia (Central Statistical Agency)

The diversity of honey types and their balanced repartition across the national territory fit well with a pilot scale approach to focus on one quality honey labeling experience in one region. This pilot experience can later be consolidated and scaled out to other regional honey value chains.

22. COMMERCIAL DIMENSION

Ethiopia is the 10th-largest honey producer in the world, and accounts for respectively 3% and 28% of global and African output, with 44 000 MT production in 2014, growing 2% annually on average. However, its linkages with export markets are underdeveloped. Nearly 80% of Ethiopian honey output is crude honey (primarily for brewing of the popular honey wine: *tej*). About 15% is mass table honey. Only about 5% is premium table honey (organic, monofloral, etc.). The vast majority of Ethiopian honey is consumed domestically, with only about 2% of output currently exported (ATA 2016). The world demand for honey is steadily growing and natural food concerns command a strong trend towards certified and origin honeys.

Traceability and quality control

Ethiopia is listed as a Third Country permitted to export honey and beeswax by the European Commission since 2008 on the approval of residue monitoring plans submitted by third countries in accordance with Council Directive 96/23/EC, notified under document C(2010) 3548 (2010/327/EU).
Since 2009 Ethiopia keeps investing a large amount of money to collect samples of honey yearly and send to laboratories recognized by EU and submit the report of analysis. High-level honey expertise is now available in Universities and training centers, although more analytical facilities are needed.
Ethiopia has developed honey standards (ES 1202) which comply with ISO and CODEX standards; but enforcement remains uneven. A well-monitored pilot level activity is important to ensure the implementation of a fully-fledged traceability and control system.

Honey fetches a premium price in cities. Local price of honey is high in towns (range from USD 6 to 10 per kg) and relatively low in remote rural areas (range from USD 1.4 to 5 per kg). External market demand is recent but growing and with great potential.

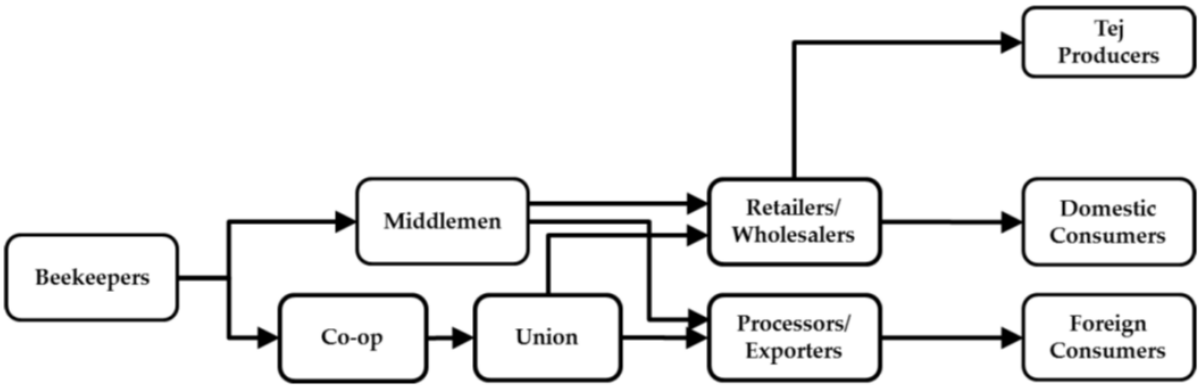

Figure 3. Organization of the Ethiopian honey value chain (Source: Dong Y. et al., 2016)

Moreover, Ethiopia has the potential to produce up to 500,000 tons of honey and 50,000 tons of beeswax per year. Ethiopia is leading in Africa in honey production. The beekeeping industry is flourishing in the country. In the last 15 years (2001-2015), Ethiopia's honey production increased from 28,000 tons to 54,000 tons.

23. ORGANIZATIONAL DIMENSION

Beekeepers in Ethiopia often organize into associations or cooperatives to channel the product to markets. The Ethiopian Apiculture Yearbook 2016 lists more than 130 beekeepers' cooperatives and cooperative unions, as well as 43 processors/exporters.

The apiculture sector counts with public and private national and international support.

The Ethiopian Apiculture Board (EAB) was established as an apex body to coordinate professional Associations and other stockholders towards the implementation of policies and development activities. Other national sector-wide coordinating institutions include the Ethiopian Honey and Beeswax Producers and Exporters Association (EHBPEA), and the Ethiopian Society of Apiculture Science (ESAS). Dedicated research Centers include Holeta bee Research center and specific university Departments.

Ethiopia counts with some certification experience. Quality regulation institutions in charge of Ethiopian food quality standards, certification and accreditation are established and can be trained to become operational on Geographical Indications, particularly for external control. Concerned entities could include ECAE (Ethiopian Conformity Assessment Enterprise) in relation with ENAO (Ethiopian National Accreditation Office).

Finally, the private sector is actively involved in supporting the apiculture activity as well as many national and international governmental or non-governmental entities (GIZ, SNV, ACDI/VOCA, Oxfam, etc.).

3. Conclusions and way forward

Besides honey, the feasibility study for a project supporting a legal framework and implementation of Geographical Indications in Ethiopia scrutinized several products, such as: coffee, sesame, teff, and butter.

Honey was found to be the overall best choice to test and implement at pilot scale the GI labeling in Ethiopia, for several reasons (CIRAD-Ecocert, 2018). First, because of the long-standing and nation-wide know-how of elaboration, use and marketing of honey products. The coexistence of many different specialty regional honeys in Ethiopia, with strong links and distinct characteristics according to the locality of production, such as Wukro (Tigray), Lalibella (Amhara), Yayo forest (Oromia), Masha-Bonga (SNPP), is favorable to the implementation of a pilot project approach. Second, external market demand is recent, but growing and with great potential. The volumes produced in each regional honey production area are not so large. Therefore, it seems possible to develop in one region a careful quality monitoring experience that could be useful for other places. Finally, the apiculture sector in Ethiopia also counts with high-level technical support from national and international institutions, and with dynamic value-chain wide coordinating institutions, such as the Ethiopian Apiculture Board (EAB).

In other words, honey was able to reach good scores on the three main dimensions of feasibility for Geographical indications: technical feasibility; commercial feasibility; and organizational feasibility).

This approach shall require a wide collaboration from the honey value chain itself, from the national and regional authorities (Ethiopian Institute of Intellectual Property, the Ministry of Agriculture and Livestock, the Ministry of Trade, Regional governments), and from national honey experts.

Despite the existence of difficulties and challenges (ATA 2016), Ethiopian honey appears to be a credible candidate for the establishment of Geographical Indications, and can become a showcase to innovate with this new form of land-based labelling in Ethiopia.

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