Session Report | Strengthening Agricultural Revenues in Hadhramaut | June 2026

The Honey Value Chain in Hadhramaut

Findings of the pre-group focus discussion on enhancing agricultural revenues, production, quality, market access, and the road to export

Prepared by
Core Insights Consulting
Funded by Yemen Aid

EXECUTIVE SUMMARY

Hadramaut's honey sector is one of the governorate's most distinctive economic assets, anchored by world-renowned Sidr honey, yet it generates a fraction of the value it could. The pre-group focus discussion convened the full breadth of the value chain, from beekeepers and traders to associations, the Agriculture Office, the export centre, a testing laboratory, the chamber of commerce, and the university, to map where value is created, where it is lost, and what would have to change for the sector to become a reliable engine of rural income.

The central finding is that the binding constraints lie downstream, not in production. Hadrami beekeepers produce honey of exceptional quality, but most of the value is captured after the honey leaves their hands, by traders and exporters who control packaging, market access, and the relationships that reach high-paying buyers. The gap between the farm-gate price and the final, marketed price is wide, and the producer's share is thin: for pasture honey, the beekeeper's net margin was estimated at roughly five per cent, while sugar feeding alone consumes about half of production costs.

Three structural weaknesses compound this imbalance. First, the absence of a credible quality-assurance system, accredited laboratories, traceability, certification, and a registered trademark, leaves genuine Hadrami honey indistinguishable from adulterated or imported product and locks exporters out of premium regulated markets. Second, weak border control and the routine movement of honey out of the country as informal “gifts” mean that official exports of around 2,000 tonnes a year understate true volumes several times over, while cheap imported honey and disease-carrying foreign bee colonies undercut local producers at home. Third, the institutional and legal framework is thin: there is no law regulating beekeeping, no beekeeper register, and the newly opened honey export centre still lacks the official accreditation that would make its stamp recognised at borders and abroad.

Participants converged on a clear message: raising revenue depends on intervening across the whole chain — production, aggregation, packaging, and marketing, and on protecting the reputation of Hadrami honey. Priority actions include regulating imports, activating and accrediting the export centre, building accredited testing and traceability, training beekeepers and input suppliers, protecting and rehabilitating Sidr pastures, and registering a collective trademark. These are the messages the session contributes to the white paper and the main workshop.

EXHIBIT 1 · SECTOR AT A GLANCE

A world-class product that captures only a fraction of its potential value

≈ 2,000 t	≈ 5%	≈ 30%	50%
Official honey exports per year — true volumes are several times higher,	Net profit margin for a pasture-honey producer, despite very high costs	Bee colonies lost after every harvest season — a recurring drain on income	Of pasture-honey production cost is sugar feeding alone

Source: Core Insights Consulting — Honey Value-Chain Focus-Group Session, Al-Ahqaf Hotel, Seiyun, June 2026. CORE INSIGHTS CONSULTING

01 INTRODUCTION AND BACKGROUND

Hadramaut is one of Yemen's most important agricultural governorates, and honey is among its highest-value and most internationally recognised products. Hadrami Sidr honey, produced from the nectar of the Sidr (Christ's-thorn) tree, commands premium prices across the Gulf and beyond and carries a reputation built over generations. Beekeeping is also a significant source of rural livelihoods, supporting thousands of households across the wadis and plateaus of the governorate.

Despite this potential, the sector operates well below its economic ceiling. Producers face rising costs, degrading pastures, and weak bargaining power, while the absence of quality infrastructure and export accreditation prevents the governorate from converting its reputation into reliable foreign-currency earnings. This report is the product of a structured pre-group focus discussion, the third in a series of three value-chain consultations feeding into a white paper and a main workshop on enhancing agricultural revenues in Hadramaut. The honey session brought stakeholders together to diagnose the chain candidly and to identify practical, sequenced interventions.

The discussion was conducted under a simple rule that this report preserves: views are attributed to stakeholder categories, beekeepers, associations, traders, agricultural officials, export actors, research institutions, and private-sector representatives, and never to named individuals.

02 OBJECTIVES OF THE SESSION

The session was designed to surface, in the participants' own words, how value moves through the honey chain and where it leaks away. Its specific objectives were:

- **Map the value chain.** Reconstruct the honey value chain in Hadramaut as the actors themselves experience it, stage by stage, and identify where value is created and where it is lost.
- **Diagnose the binding constraints.** Identify the production, quality, marketing, institutional, and environmental challenges that most limit productivity, quality, revenue, and export.
- **Surface revenue opportunities.** Pinpoint the most promising routes to higher income for producers and the wider chain, including branding, certification, and market expansion.
- **Define practical interventions.** Agree on actionable recommendations, the actors responsible, and indicative timeframes, and rank them into priorities.
- **Feed the white paper and workshop.** Distil messages that should inform the forthcoming white paper and the main workshop on agricultural revenues.

03 PARTICIPATION AND STAKEHOLDER REPRESENTATION

The discussion assembled actors from across the chain so that production, regulation, science, finance, and trade were all represented in the same room. The general tone was positive and constructive, with broad agreement on honey's promise as an economic pillar for Hadramaut.

Stakeholder category	Representation in the session
Production centres	Honey-bee centre, Wadi Al-Nahl production unit, the commercial honey centre, and a local-industries factory
Associations	Beekeepers' associations from across the governorate, including a long-established association and a district-level body
Agriculture Office	Senior leadership of the Office of the Ministry of Agriculture & Irrigation in Hadramaut
Chamber of Commerce	Senior representation of the chamber, reflecting the trade and export perspective
Research and laboratories	A scientific testing laboratory and the agricultural faculty / research perspective
Export centre	The honey export centre, covering testing, packaging, and certification functions
Traders	Honey traders representing the downstream, market-facing segment of the chain

Table 1. Stakeholder categories represented in the honey value-chain discussion. Views in this report are attributed to these categories only.

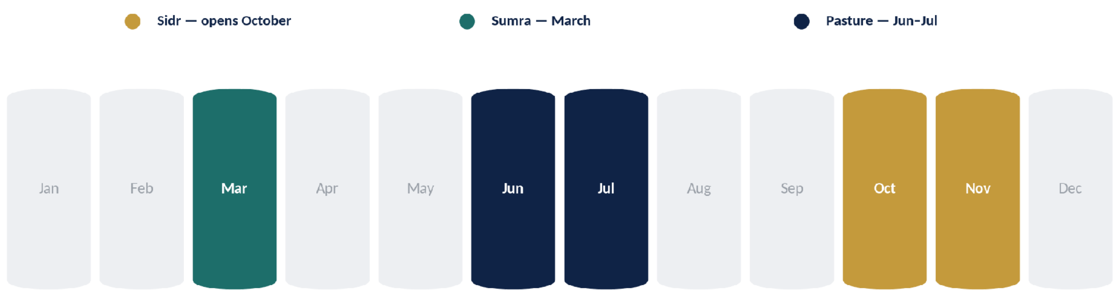
04 OVERVIEW OF THE HONEY VALUE CHAIN IN HADRAMAUT

Participants described a chain that can be grouped into three broad phases, each with its own actors and its own points of value creation and loss. The pre-harvest phase covers the bees, the pasture, apiary inputs, and apiary management. The harvest phase covers extraction, sorting, and storage. The post-harvest phase covers packaging, marketing, and the economic return that flows back to producers and intermediaries.

Hadramaut produces several honey types, and the distinctions matter commercially. Sidr honey is the flagship product, high-value, in strong demand locally and abroad, and harvested from October. Sumra (Samar) honey, harvested around March, is valued for its natural antibiotic properties (MGO). Pasture honey, harvested around June and July, is the most affordable type and the one whose producers earn the thinnest margins. The honey calendar shapes the whole economy of the sector: the Sidr season opens in October, followed by roughly five months of rest to strengthen the colonies, then the Sumra season in March, and the pasture season in June–July. A beekeeper typically draws one seven-kilogram tin from every two to three medium-yield hives, and harvesting occurs every 40 days at the earliest, 50 days is preferable, especially for Sidr.

EXHIBIT 2 · PRODUCTION CALENDAR

Three harvests a year, paced by long colony-rebuilding rests



Note: Lighter cells are rest periods to strengthen colonies; honey is harvested every 40–50 days.

Source: Core Insights Consulting — Honey Value-Chain Focus-Group Session, Al-Ahqaf Hotel, Seiyun, June 2026. CORE INSIGHTS CONSULTING

> *"If the value of honey rises, the beekeeper's interest in it rises too. Attention to standards raises value, and when value rises, profit and revenue rise."*
>
> — PRODUCTION-CENTRE REPRESENTATIVE

05 VALUE CHAIN ANALYSIS

Participants mapped value creation and loss at each stage. The analysis below follows the chain from pasture to market, and the table that follows captures the stage-by-stage picture the group drew.

Pre-harvest: bees, pasture, inputs, and apiary management

Value originates with healthy colonies and good pasture. Strong bee stock converts nectar into honey, produces wax, and improves pollination; weak strains or disease cause colony death and direct losses to the beekeeper. Good pasture — rich in nectar plants and quality pollen, is the foundation of high-quality honey, and it is also the most exposed point in the chain: value is lost here to pesticides, climate stress, and competing or harmful vegetation. Apiary inputs and management determine how much of that potential survives to harvest. Good husbandry, disease control, and appropriate feeding raise output; poor practice, low-grade equipment, and costly inputs erode both yield and quality.

Harvest: extraction, sorting, and storage

Value is created when clean honey is extracted with its characteristics and quality preserved, and lost to contamination, moisture, poor sorting, and bad storage. Participants were emphatic that much of the adulteration in the chain occurs in the pasture during sorting, and that poor storage vessels, in particular low-grade aluminium and iron tins, degrade the product. The widely supported remedy was to move to stainless-steel containers ("qaroof") that protect the honey and command higher trust and price.

Post-harvest: packaging, marketing, and economic return

This is where the largest share of value is determined, and, today, lost to producers. Attractive, protective packaging raises trust, price, and access to new markets. Marketing creates value when it reaches consumers at home and abroad and builds a recognised Hadrami honey brand; it loses value through the long chain of intermediaries between beekeeper and consumer, weak promotion, and adulteration that damages the product's reputation. The economic return sustains the whole system when activity is profitable, and collapses when prices fall, costs rise, and access to external markets is weak.

Stage	Key actors	Where value is created or lost
Bees	Beekeepers	Created when strong colonies convert nectar to honey, wax, and pollination; lost to weak strains and disease.
Pasture	Beekeepers, farmers	Created by rich nectar plants and quality pollen; lost to pesticides, climate stress, and harmful vegetation.
Apiary inputs	Beekeepers	Improved husbandry lowers risk; poor or costly equipment lowers quality.
Apiary management	Beekeepers, labour	Good colony management, disease control, and feeding raise output; poor practice loses value.
Extraction, sorting, storage	Beekeepers, labour	Clean extraction preserves quality; contamination, moisture, and poor storage destroy it.
Packaging	Traders, associations, companies	Protective, attractive packaging (stainless steel) raises value, trust, and price.
Marketing	Traders, associations, companies	Reaching consumers and branding create value; many intermediaries and adulteration lose it.
Economic return	Traders, associations, beekeepers	Sustained by profitable activity; lost to low prices, high costs, and weak market access.

Table 2. Value-chain map as drawn by participants: stages, actors, and points of value creation and loss.

Export and market access

Hadrami honey already reaches external markets, Saudi Arabia absorbs the largest share, with additional demand from Gulf states such as the UAE and from South-East Asian markets including Indonesia and Malaysia. But access to premium, regulated markets is blocked by the absence of accredited testing, traceability, and certification, and by exporters' limited familiarity with EU and other import requirements. The result is a chain that can sell, but cannot command the prices its quality should earn.

EXHIBIT 3 · EXPORT MARKETS

Exports lean on informal Gulf demand; premium regulated markets stay closed

Note: ≈ 2,000 t are officially exported per year; true volumes are several times higher via informal 'gift' channels.

Source: Core Insights Consulting — Honey Value-Chain Focus-Group Session, Al-Ahqaf Hotel, Seiyun, June 2026. CORE INSIGHTS CONSULTING

06 HARVEST, POST-HARVEST LOSSES AND STORAGE

The challenges raised in the session cluster into six themes. Together they explain why a sector with exceptional product quality nonetheless delivers modest and insecure returns to its producers.

EXHIBIT 4 · VALUE CHAIN

Value is created upstream but captured downstream, after honey leaves the beekeeper

Source: Core Insights Consulting — Honey Value-Chain Focus-Group Session, Al-Ahqaf Hotel, Seiyun, June 2026. CORE INSIGHTS CONSULTING

EXHIBIT 5 · KEY CONSTRAINTS

Six structural constraints — the binding ones lie downstream, in marketing and export

01 Production & pasture

Outdated breeding, harvest and storage; high input costs; degrading Sidr pastures.

02 Quality & technical

Adulteration, weak sorting; locally-made imitation honey current labs cannot detect.

03 Marketing & value-capture

Weak reach; traders from outside the governorate capture most of the value.

BINDING CONSTRAINT

04 Export & certification

No health certificates, Q-CAP or ISO 17025; not on the Halal list or in EU TRACES.

BINDING CONSTRAINT

05 Institutional & regulatory

No beekeeping law or register; the export centre is not yet officially accredited.

06 Environmental & climate

Drought and tree die-off; invasive Anam, Parthenium and Dams; external and wild bees.

Source: Core Insights Consulting — Honey Value-Chain Focus-Group Session, Al-Ahqaf Hotel, Seiyun, June 2026.

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Production and pasture-related challenges

Production is constrained by inexperience among newer beekeepers and by outdated breeding, harvesting, and storage practices, all of which depress yield and quality. Input and equipment costs are high and rising, squeezing margins. Beekeepers often cannot move hives to better and more distant pastures, and there are few field visits or extension services to support them. The pastures themselves are weakening: the original Sidr pastures are degrading under firewood cutting, and natural rangelands are deteriorating with no plan to establish alternatives.

Quality and technical challenges

Quality is undermined at several points: adulteration, poor harvesting, inadequate storage and tools, beekeepers' limited grasp of standards, and weak sorting. A particularly serious threat is the local manufacture of honey resembling pasture honey that cannot be detected in current laboratory tests, with no investigation or accountability. Laboratories themselves lack analytical-chemistry staff, and some beekeepers test only for sugar content. Participants also noted technical subtleties that complicate quality assurance: freshly harvested Sidr shows a high sugar reading until its molecules stabilise, and honey from pastures west of Wadi Hadramaut does not crystallise even though the pasture is good, realities that an immature testing regime can misread.

Marketing and value-capture challenges

Marketing is weak and poorly coordinated, both inside Yemen and abroad, and local marketers and traders lack the reach to open new external markets. The structural consequence is that most of the value created in Hadramaut is captured outside it: the largest beneficiaries of honey revenues are traders from outside the governorate. Local honey sales still rest largely on trust rather than verified quality, which caps the value of entire batches and leaves producers, especially of pasture honey, with weak returns relative to their costs.

> *"We rely almost entirely on the Gulf market for export. Large volumes leave informally, undocumented, as 'gifts', which makes it very hard to obtain a certificate of origin for Hadramaut abroad."*
>
> — CHAMBER OF COMMERCE REPRESENTATIVE

Export and certification challenges

The export barriers are concrete and, for now, decisive. There are no health certificates for honey; no international Q-CAP testing; no ISO/IEC 17025 accreditation for testing laboratories; and no plan to monitor pesticides, contaminants, and their residues. Yemen is not listed among Halal-product exporting countries and is not registered in the EU's TRACES system. Exporters are largely unfamiliar with EU standards and import requirements. Costs and procedures for shipping and trade are high, and the quality of product varies widely between producers.

Institutional and regulatory challenges

No law currently regulates beekeeping or the relationship between beekeeper, farmer, and trader. There is no beekeeper register and no professional licensing, which makes oversight, support, and accountability difficult. The recently opened honey export centre is not yet officially accredited, by the Ministry of Agriculture, by industry and trade authorities, or abroad, so its stamp and laboratory results carry no recognised standing at borders or in external markets. No trademark has been registered for Hadrami honey. Relationships between farmers and beekeepers are distant, so pesticide spraying near apiaries is poorly coordinated, and there are no field visits from the Agriculture Office to beekeepers and their pastures.

Environmental and climate-related challenges

Climate change is eroding the pastures that underpin the whole sector. Reduced rainfall and tree die-off push beekeepers toward sugar feeding, which directly lowers honey quality. Several specific biological threats were highlighted: the parasitic "Anam" plant that grows on and kills Sidr trees; "Dams" trees, planted in farms and streets, that flower alongside the Sidr and spoil Sidr honey; and the invasive American weed Parthenium, which flowers with the Sidr and produces pollen that turns Sidr honey into pasture honey. Urban encroachment is shrinking the land available for pastures and hive sites, and the entry of external bee colonies, Egyptian and small-bodied wild bees, threatens local stock, with the wild bee attacking and killing local colonies and proving impossible to house in hives.

#	Challenge	Stage affected	Effect on revenue
1	Climate change degrades pastures; low rainfall and tree death force sugar feeding	Pasture	Sugar feeding lowers quality and therefore price

#	Challenge	Stage affected	Effect on revenue
2	High and rising input and equipment costs	Inputs	Higher production costs, thinner margins
3	Inexperience and outdated breeding, harvest, and storage practices	Apiary management	Lower output and quality, lower price
4	Weak marketing and limited trader reach to external markets	Marketing	Missed demand and higher prices; lower revenue
5	Weak producer returns, especially for pasture honey; traders capture final value	Economic return	Beekeeper receives a small share of final value
6	Imported honey enters freely amid weak border control	Economic return	Cheap competition depresses local prices
7	External and wild bee colonies threaten local stock	Apiary management	Colony death and heavy product losses
8	Degrading Sidr pastures and firewood cutting	Pasture	Lower productivity and quality, lower income
9	Product not officially registered or certified to quality standards	Marketing / return	Blocks premium and external market access
10	No pesticide and contaminant monitoring plan	Production / marketing	Quality risk; lower selling price
11	Not on the Halal exporter list; not in EU TRACES	Marketing / return	Cannot document product for regulated export
12	No health certificates, Q-CAP, or ISO 17025 accreditation	Sorting / marketing	Quality erodes; value lost
13	Export centre not accredited; no recognised official stamp	Marketing	Product and quality not documented for export

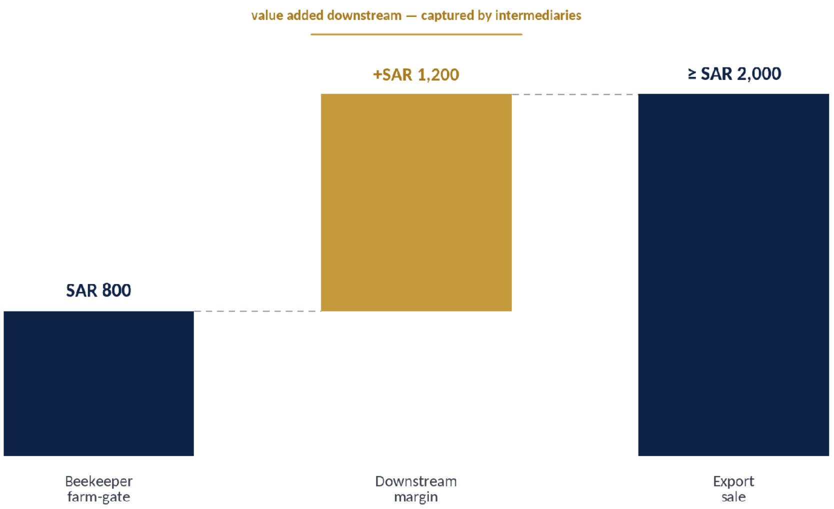
Table 3. Priority challenges constraining honey revenues, by stage affected and revenue impact.

07 COST STRUCTURE AND REVENUE DISTRIBUTION

The economics of the chain make the producer's disadvantage concrete. Participants set out indicative price splits for the two main honey types. For a tin of pasture honey selling at YER 30,000, the beekeeper receives YER 27,000, the intermediary YER 1,000, and the trader YER 2,000 — but the beekeeper's apparent share is misleading, because his costs are very high. For original Sidr honey, the lowest-level price is about SAR 800, of which the beekeeper receives SAR 800, the intermediary YER 2,000, and the trader a profit of at least SAR 1,000 — with the honey exported for no less than SAR 2,000. In other words, the value more than doubles between the beekeeper and the export sale, and that uplift accrues downstream.

EXHIBIT 6 · VALUE CAPTURE · SIDR HONEY, PER 7 KG TIN

Hadrami honey more than doubles in value after the farm-gate



Note: For pasture honey, the beekeeper's 90% nominal share of a YER 30,000 tin nets only ~5% after costs.

Source: Core Insights Consulting — Honey Value-Chain Focus-Group Session, Al-Ahqaf Hotel, Selyun, June 2026. CORE INSIGHTS CONSULTING

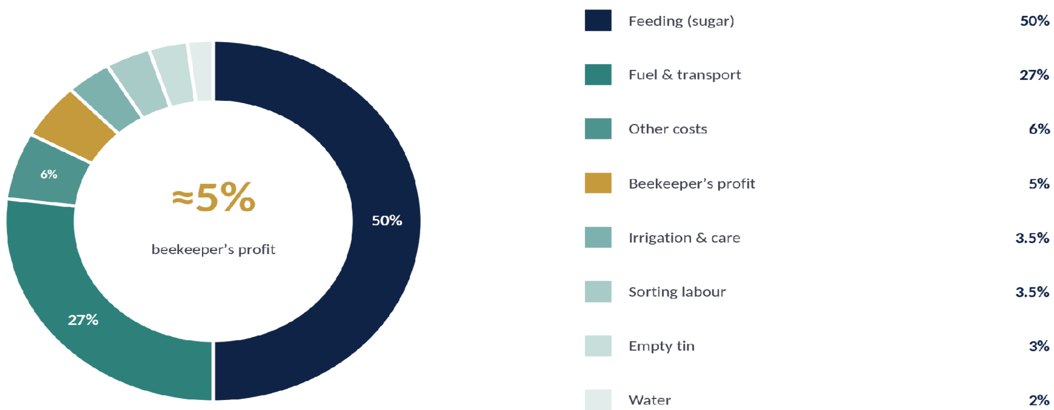
Cost breakdown for a tin of pasture honey

Cost component	Share of cost
Feeding (sugar)	50%
Fuel and transport	27%
Other miscellaneous costs	6%
Beekeeper's profit	5%
Irrigation and care labour	3.5%
Sorting labour	3.5%
Empty tin	3%
Water	2%

Table 4. Indicative cost structure of a tin of pasture honey. Sugar feeding alone is half of cost; the producer's profit is about five per cent.

EXHIBIT 7 · COST STRUCTURE · PASTURE HONEY

Sugar feeding alone is half the cost; the beekeeper keeps about 5%



Note: Shares of the total production cost of one standard tin.

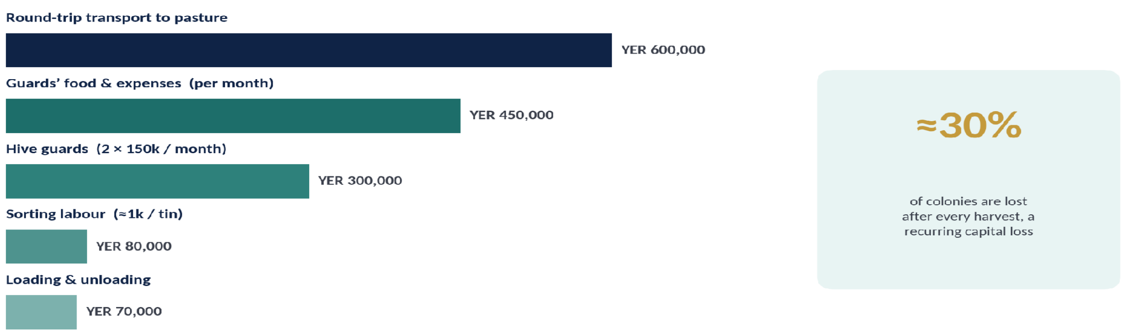
Source: Core Insights Consulting — Honey Value-Chain Focus-Group Session, Al-Ahqaf Hotel, Seiyun, June 2026. CORE INSIGHTS CONSULTING

Production costs for Sidr honey (around 100 hives)

For an average operation of around 100 hives, participants estimated round-trip transport to the pasture at about YER 600,000; loading and unloading labour at YER 60,000–80,000; hive guarding at YER 150,000 per guard per month, for at least two guards; food and expenses for the guards at about YER 450,000 per month; and sorting labour at about YER 80,000 (around YER 1,000 per tin). On top of these cash costs, roughly 30 per cent of colonies are lost after harvest, a recurring capital loss that the price of honey must cover.

EXHIBIT 8 · PRODUCTION ECONOMICS · ~100 HIVES

Running ~100 Sidr hives is cash-intensive — before a recurring 30% colony loss



Note: Indicative per-season estimates; items mix monthly and seasonal cadence.

Source: Core Insights Consulting — Honey Value-Chain Focus-Group Session, Al-Ahqaf Hotel, Seiyun, June 2026. CORE INSIGHTS CONSULTING

"When support is available, it goes straight to Sidr pastures only, as if other pastures, especially pasture honey, matter far less."

— BEEKEEPERS' ASSOCIATION REPRESENTATIVE

08 OPPORTUNITIES FOR INCREASING REVENUES

Participants identified a coherent set of revenue opportunities. Crucially, the largest gains lie not in producing more honey but in capturing more of the value of the honey already produced, through quality, branding, certification, and market access.

01 Premium Sidr honey and pasture rehabilitation

Meet strong domestic and external demand for Sidr honey by caring for its pastures and planting Sidr trees, selecting the best harvests, and packaging them as a distinct premium product that earns a higher price per kilogram.

02 Modern packaging

Upgrade packaging to protect the product, raise consumer trust, and reach new, higher-priced markets, moving decisively to stainless-steel containers.

03 A Hadrami honey brand

Develop a collective trademark and geographic identity for Hadrami honey, lifting price through consumer trust and product distinction in marketing and export.

04 Higher production quality

Raise quality during harvesting and apiary management by improving breeding and pasture, narrowing the gap between Hadrami honey's reputation and its verified quality.

05 An activated, accredited export centre

Bring the honey export centre into full operation with the certifications and licences required by external markets, so that its stamp and tests are recognised at borders and abroad.

06 Market expansion at home and abroad

Exploit the price gap and strong external demand for high-quality, standards-compliant honey by opening marketing channels beyond Hadramaut and into export markets.

09 ROLES AND RESPONSIBILITIES OF KEY ACTORS

Participants were specific about who should do what. Aligning these roles, and closing the gaps between them, is itself one of the sector's most important reforms.

Actor	Role and responsibilities
Office of the Ministry of Agriculture	Halt and regulate honey imports and curb adulteration; set export requirements and prepare associations and beekeepers to meet them; police honey markets and hold adulterators to account; provide extension and technical support; and issue laws regulating the sector. Honey has now been placed under the animal-production directorate to strengthen this mandate.
Associations	Provide trading outlets and inputs for beekeepers; offer technical advice on pests, diseases, and pesticide use; represent beekeepers domestically and internationally; deliver laboratory testing and input support; market production; and train members.
Honey export centre	Conduct laboratory testing and analysis of honey samples; package and seal product; and secure recognised accreditation for Hadrami honey exports, with branches in each district.
University and research centres	Raise awareness of pasture protection (notably against the Dams tree); improve laboratory testing services; and educate on honey quality standards, promotion, and marketing, with stronger support for applied research.
Honey-bee centre	Treat diseases affecting bees and hives, train beekeepers, and support research, once activated and resourced to perform its role.
Chamber of commerce	Facilitate external marketing and the procedures for international registration and licensing required to reach external markets.
Local authorities, donors, private sector	Support honey-sector infrastructure; ease investment and marketing; fund laboratories, quality, and traceability systems; and connect producers to development programmes, fairs, and external markets.

Table 5. Roles and responsibilities of key actors across the honey value chain.

10 PROPOSED SOLUTIONS AND PRACTICAL RECOMMENDATIONS

The session produced a structured set of recommendations with proposed owners and indicative timeframes. They are presented below by the actors best placed to lead them.

#	Recommendation	Proposed lead	Horizon
1	Issue professional licences and permits for beekeepers to regulate the profession	Ministry of Agriculture & Irrigation	6 months
2	Form a committee to regulate export and import, plan production and marketing, and oversee the Sidr harvest to prevent adulteration and protect its reputation	Agriculture Office; associations	6 months
3	Update the beekeeper databases held by associations and the Agriculture Office	Agriculture Office; associations	3 months
4	Regulate honey imports and enforce the existing rule limiting packs to 2 kg	Export centre	6 months
5	Develop local pollen production and set fixed pollen standards per Sidr pasture (e.g. Daw'an) to expose imported honey	Agriculture Office	12–18 months
6	Provide technical training to beekeepers and input shops on quality, treatments, and pesticide use	Donors, NGOs, associations	6 months
7	Activate and accredit the export centre as a supervisory body, with recognised lab tests and district branches	Local authority; Ministry of Industry & Trade; export centre	6 months
8	Ban imports of bees that carry disease and pesticide residues	Ministry of Industry & Trade; export centre	6 months
9	Establish an independent honey unit within the Ministry of Agriculture and its district offices	Agriculture Office	6 months
10	Provide and maintain HPLC sugar-testing equipment and ensure continuity of operation	Donors	—
11	Hold a Hadrami Honey Day in Aden, other governorates, and Riyadh to promote and open new markets	Ministry of Industry & Trade	6 months
12	Study a price-stabilisation mechanism for pasture honey via associations to protect producer profitability	Donors; Agriculture Office	3 months
13	Transfer the outputs and projects of donor programmes to associations at close to ensure sustainability	Donors	—

#	Recommendation	Proposed lead	Horizon
14	Impose measures (tariffs or quotas) to limit imported honey that competes with local product	Ministry of Trade & Industry; exporters	6–10 months
15	Apply good agricultural practices to lower costs and reduce losses	Agricultural extension; development organisations	6 months
16	Organise beekeepers into marketing associations or unions to set prices and quality standards	Local authority; agricultural associations	6 months
17	Open marketing channels outside Hadramaut to widen markets and demand	Ministry of Trade & Industry; exporters	6–12 months

Table 6. Practical recommendations with proposed leads and indicative timeframes.

Environmental and pasture-protection measures

Beyond the table above, participants stressed a parallel package to protect the natural base of the sector: encouraging farmers to plant Sidr trees to resist urban encroachment on pastures; building water barriers and small dams in rangelands, wadis, and floodways; combating the parasitic Anam plant and the invasive Parthenium weed; regulating the cutting of Sidr trees; establishing protected natural reserves for organic honey, potentially through commercial and external investment; coordinating with farmers to time pesticide spraying away from apiaries; and working with the cleaning and improvement fund to remove harmful ornamental trees from streets and gardens while barring nurseries from producing them.

11 PRIORITY ACTIONS FOR THE MAIN WORKSHOP

Participants ranked the interventions through a prioritisation exercise. The ordering below reflects the actions the group judged most consequential for raising revenue, each with the rationale offered.

01 Curb honey imports and regulate import
Establish rules governing imports so that the local product is favoured and not undercut, raising the sector's economic return.

02 Meet external-market requirements and activate standards bodies
Equip the sector for export by meeting market requirements and activating international standards, so that high-quality honey can reach external markets at high prices and strong economic return.

03 Train beekeepers and activate agricultural extension
Enable producers to raise output and quality and to capture a larger share of the value of their own product.

04 Protect pastures from harmful trees and expand Sidr planting
Protect pastures from the Dams tree, encourage farmers to plant Sidr, and reduce ornamental trees, raising output and the quality of harvested honey.

05 Register a Hadrami honey trademark and fight local adulteration
Document the honey to raise external demand and revenue while curbing locally manufactured imitation honey.

06 Build water barriers in lands and wadis
Reduce losses and protect bees and hives by retaining water in the rangelands.

07 Establish natural reserves for organic honey
Create qualified, protected sites for hives that raise both yield and quality of the harvest.

08 Set a mechanism for pasture-honey pricing
Build an agreed basis for the final value and price of pasture honey, raising producer returns and their share of a higher final value.

12 AREAS OF AGREEMENT AND DISAGREEMENT

Points of clear agreement

The group converged strongly on the building blocks of a credible quality and export system: establishing traceability and obtaining accredited quality and international standards certification for export; regulating imported honey; building comprehensive testing laboratories and ensuring they are actually activated; and activating the commercial honey centre in Al-Qatn district and accrediting it as an official supervisory body recognised at borders and in external markets.

Points of disagreement

Two issues divided participants. The first was the proposal to create a union of beekeepers' associations to unify efforts: some saw it as essential, while others judged the associations' role to be negligible — whether individually or collectively, and feared that a union would constrain the roles of other associations. The second was the prioritisation exercise itself: participants did not fully agree on the ranking of actions or the scoring assigned to them. These differences are not obstacles but signals of where the main workshop will need to build consensus.

13 IMPLICATIONS

The honey session contributes a set of messages:

- **Treat honey as an economic pillar.** The sector needs dedicated support and a legal framework regulating it in Yemen and Hadramaut, and should be adopted as an economic tributary across government.
- **Marketing and market access outweigh production.** The challenges of reaching high-value markets exceed those of production itself; connecting producers to domestic and external markets is the most direct route to higher revenue.
- **Invest in trust, reputation, and geographic identity.** A protected reputation and geographic identity for Hadrami honey can create a durable competitive advantage; quality, traceability, and certification are the gateway to more profitable markets.
- **Intervene across the whole chain.** Raising revenue requires targeting production, aggregation, packaging, and marketing together, not production alone, alongside training and support for beekeepers and traders.
- **Quality and value-addition drive revenue growth.** Investing in Sidr-honey quality, professional packaging, and branding yields a higher return than expanding volume.
- **Diversify income to build resilience.** Using wax, propolis, and pollen can raise the income of beekeeping households and strengthen the sector.
- **Prioritise quick-win, high-impact actions.** Standards compliance, accredited external certification, better packaging, market linkage, and use of by-products can deliver tangible revenue gains in a short period.

14 CONCLUSION

Hadramaut's honey sector does not have a product problem; it has a value-capture problem. The governorate produces honey of a quality that markets reward, yet the structures that would let producers and the wider chain capture that reward, quality assurance, accredited certification, traceability, a recognised brand, regulated trade, and an institutional and legal framework, are largely absent. The result is a sector that sells below its worth, loses ground at home to cheap imports and adulteration, and forfeits the premium markets abroad to which its reputation should give it ready access.

The discussion offered a credible path forward: protect the natural base of the sector, professionalise production, build the quality and certification infrastructure, activate and accredit the export centre, register and defend a Hadrami honey brand, and regulate trade so that local producers compete on fair terms. None of these is beyond reach, and several can begin within months. Acted together, and across the whole chain rather than at production alone, they can turn one of Hadramaut's proudest products into one of its most reliable sources of rural income.

“Developing Agricultural Revenues in Hadramout” Initiative

Developing Agricultural Sector Revenues in Hadhramaut works to raise farmers' incomes and sector revenues across the governorate's flagship crops. Through three crop-focused dialogues — onion, dates, and honey — it convenes farmers, traders, exporters, and government bodies to diagnose where value is lost and agree practical fixes, feeding into a reference white paper and a main workshop on 5 July.

About the funder

YEMEN AID

Founded in 2016 by Yemeni-American professionals, Yemen Aid is a humanitarian and development organisation serving the Yemeni people without distinction. A registered U.S. 501(c)(3) and licensed INGO in Yemen, it works across emergency relief, livelihoods, and the recovery of Yemen's productive sectors.

About the implementer

CORE INSIGHTS CONSULTING

Core Insights Consulting is a German-based advisory firm specialising in political economy, governance reform, and evidence-based policy in fragile states, with deep expertise and local presence in Yemen.