

MARKET RESEARCH REPORT

MARKET STUDY SPECIFIC TO THE HONEY AND BEEKEEPING SECTOR IN NEPAL



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INTRODUCTION TO THE RESEARCH

Honey is one of the most ancient and traditional ingredients in cuisines all over the world. The production of honey differs greatly from one country to another and from beekeeper to beekeeper. The species of bees, nature of flowers, traditions, different usages, level of industrialisation in the processing of the raw product, and its packaging are some of the reasons for this diversity.

While wild honey from the Himalayas benefits from world fame due to its rarity and specific taste, the more classic honey made by *Cerana* bees from different flowers in the Terai and mid hill regions of Nepal is the most famous in the country and most widely accepted under the definition of traditional Nepalese honey.

Mainly produced in the districts of Dang, Banke, Pyuthan, Surkhet, Dailekh and Kailali in the south west of Nepal, it is easy to find

beekeepers all over the country and in and around the Kathmandu Valley. The most common flavours (defined according to the flowers' pollen used by the bees to create honey) are mustard, butter tree (chiuri), litchi, mixed flowers and rudilo (a famous medicinal plant), and occasionally buckwheat, thus making Nepalese honeys' range of tastes and sources wide.

With two main harvesting seasons, in spring and autumn, the production of pure honey is uneven during the year and sometimes pushes beekeepers to use alternative ways to feed their bees to keep a constant production.

This study has been commissioned by the Inclusive Development of the Economy (INCLUDE) Programme. The INCLUDE Programme, is a joint Nepali-German initiative under the guidance of the Nepal

Ministry of Industry (MoI) and with Technical Assistance by the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH, acting on behalf of the German Federal Ministry for Economic Cooperation and Development (BMZ). The programme aims to contribute to an environment that is particularly conducive to socially balanced economic development. Following a partner-oriented and systemic approach, INCLUDE strengthens the institutional capacities at government, private sector and cooperative levels and supports their interaction. The economic stake-holding of selected target groups is promoted specifically via value chain approaches. This includes value chains such as honey, medicinal and aromatic plants and dairy. INCLUDE's objective is: Selected actors from the public, private and cooperative sector increasingly perform their roles in promoting socially balanced economic development.

This study aims to outline the current situation of the honey market in the four districts of Dang, Kailali, Pyuthan and Surkhet where the cooperative partners of the INCLUDE Programme are located, and to provide sufficient information for the development of a relevant marketing strategy in order to ameliorate the visibility of cooperatives, as well as their sales. Additionally, this study will enable understanding of the production areas where improvement is required.

Following a classic market study approach, this research was based on both a desk study of existing documents and reports and primary information provided to the researchers on field visits in Dang, Kailali, Pyuthan and Surkhet, as well as interviews and discussions in Chitwan and Kathmandu. Discussions were also held with local producers and representative of cooperative partners during the first Honey Expo in Nepal held from 3 to 6 October 2013. Each of the field visits to different districts included a visit to the partner cooperative; focus group discussions with honey producers, and surveying of three groups of people: consumers, hospitality businesses, retailers/shop owners. All

The field visits have made clear the differences in the markets in the four districts. It is important to report on each separately, but there are also similarities between the districts.

surveys were conducted in the areas near the cooperative and/or, whenever possible, the nearest urban area. The meetings and discussions with partner cooperatives, as well as the focus group discussions with honey producers, were divided in two distinct parts with a two-phases questionnaire (first part being closed or multiple choices questions, second being open questions and remarks from the respondents) and a short training on ready-to-apply marketing tools and solutions according to the situation of the cooperative and producers and their immediate needs.

The field visits have made clear the differences in the markets in the four districts. It is important to report on each separately, but there are also similarities between the districts. This report aims to provide a comprehensive understanding of the market in all districts hence the structure of the report with five clearly separated parts: one for each district and one for the findings common to all districts. As Kathmandu was not part of the area of research, its market doesn't have a dedicated part in this report. However, the possibilities of sales from the different cooperatives in the Kathmandu Valley makes it impossible to completely ignore and matters regarding the wider market and Kathmandu market are answered in the first part of the report.





I GENERALITIES

With a long tradition of honey hunting and beekeeping, Nepal has been witnessing the evolution and industrialisation of the process of honey making over the past few decades. With the introduction of the *Apis Mellifera* bee from Italy, the production of honey is meant to increase, thus answering the needs of the population who use honey for as many purposes as possible (in food, drinks, Ayurvedic and other medicinal treatments). While the production of honey remains mostly traditional the new commercial production and massive importation of honey from different countries may threaten small producers.

A –Current situation of the honey market in Nepal

1 General situation

The reputation of wild honey from Nepal at the international level is undisputed. Most guide books and many mainstream media, including TV, magazines and newspapers have covered the traditions of bee hunting in Nepal, with spectacular pictures and videos of these hunters risking their lives to gather the precious nectar of the big bees in the Himalayas. This type of honey represents a small part of the production in the country. Most of the honey produced comes either from *Cerana* or *Mellifera* honeybees and is usually found in the southern part of the country producing mainly multi-floral honey, but there is also single flower or single source honey from mainly butter tree, mustard, rudilo,

sunflower and litchi and occasionally honeydew. The classification of honey in the market is usually according to the source and often according to the type of bee and provenance. The provenance is mostly reduced on the label but can include the name of the zone of production.

The preferences in honey differ greatly according to the area (urban/rural, Kathmandu Valley/ countryside, districts with production of honey/ districts without production of honey). The branded international imported or national honey called hereafter “commercial honey” is mostly consumed in the urban areas; in districts where there is no or little production of honey, and in the Kathmandu Valley. Brandless and unlabelled honey, usually locally produced, is preferred in rural areas of the countryside. In districts producing honey, it is often bought directly from the producer by the locals or bus passengers taking home a product of the district they crossed or visited.

There are, however, general preferences applicable to the majority of Nepalese consumers. Multi-floral, sunflower or mustard honey is usually preferred as the taste is not so strong as to change radically the taste of the food or beverages it is used in. Its colour is golden (which is considered by the majority as the “normal colour” for honey), clear and liquid. Crystallised or spreading honey is scarcely ever preferred. Buckwheat and honeydew honey are usually much stronger in taste and darker in colour. Another common habit regarding honey consumption in the country is the seasonal attraction for the product. Well-known for its high nutritious value and soothing effect in cases of colds and sore throats, the consumption of honey is higher throughout the country right before and during the winter season with an increase in consumption starting as early as the beginning to mid-October and going as late as April. The use of honey as an unconventional medicine is common for colds but its usage in more specific Ayurvedic treatments is more common in rural areas where access to modern medicine is difficult or sometimes not as trusted as traditional remedies.

2 – Kathmandu and Pokhara markets

Because of the high density in population in the capital city, and its situation as a tourist destination and developed urban centre, the position regarding honey consumption is in contrast to the rest of the country, particularly the most remote areas. Honey is

used in most restaurants and breakfast serving hotels answering the demand from tourists for food and beverages mostly imported from western countries, and which are rarely known outside tourist areas.

Dabur and other international imported brands take a major part of the market in places catering to tourists due to the consistency of their products, their availability in every shop, their mild taste and golden brown colour as well as their attractive packaging and pricing. But due to the development of ‘conscious’ tourism and local elites, the sales in Nepalese honey, considered purer, safer, tastier, and healthier as well as providing employment locally, is increasing when sold directly to the consumer and not to a hospitality business. The presence of local honey producers in expatriate markets such as those held in 1905 in Kantipath, Kathmandu, every Saturday and Yellow House in Sanepa, Lalitpur, every Sunday, has increased the visibility of locally and traditionally produced honey. In most supermarkets such as Bhatbateni, Saleways or Big Mart, every consumer has a choice between several imported and local honeys, the most present one being the honey coming under the brand N. Stone Bee Concern (fig.1) who have a wide variety of honey (from different flowers, different honey species, different geographic origin, etc.).

The capital city and tourist areas are also the places with the largest variety of honey-selling shops, ranging from local shops selling only honey (i.e. the Beekeeping Shop in Manbhawan, Lalitpur selling their own brand TBS honeys), to tourist shops (in Thamel for Kathmandu and Lakeside for Pokhara), from small retail shops to big supermarkets.

Fig 1 Stone Bee Concern Products



3 – Honey export from Nepal

Though honey, like all exported products from Nepal, suffers from the political instability of the country and thus has ever changing figures, a constant trend for wild honey has been observed while the controversy over more ‘industrial’ or semi-industrial honey coming from Asia makes export of more regular honey difficult. The simple fact that most of the honey produced in Nepal doesn’t have a proper certification of production (certifying the location of production, type of bees and flowers, etc.) as well as a certification of quality (with regular quality control checks on purity, ratio of humidity present in the honey, etc.), is a major obstacle to exporting the product.

In the past two years, the only countries importing honey from Nepal in large quantities were all Asian; probably due to the lower standards of import regulations in these countries compared to the very strict USA and European Union.

The implementation of national rules for the production of honey as well as the creation of quality control services for this specific product are some of the most important factors to improve and increase the exportation of natural honey worldwide.

B – Beekeepers’ organisations in Nepal

1–Federation of Nepal Beekeepers (FNBK)

Due to the high number of members in or associated with FNBK (about 5,000 producers in 32 districts), the organisation is one of the most representative of honey production in the country, for both cooperatives and organised producers and also traditional and small producers. They work as a facilitator for dialogue between authorities and producers, occasionally helping producers in organising the sale of their products and following development of local honey production all over the country.

Marketing activities are clearly defined in two parts: 1) creation of awareness of the benefits of honey through pamphlets, advertorials in local and national print media, etc., and 2) improvement of the visibility of local products by the participation to different expos and fairs. FNBK has observed an increase in the consumption of local honey, and they conclude that about 12gm per capita of honey is

Fig. 2 Honey expo banner at the entrance of the expo



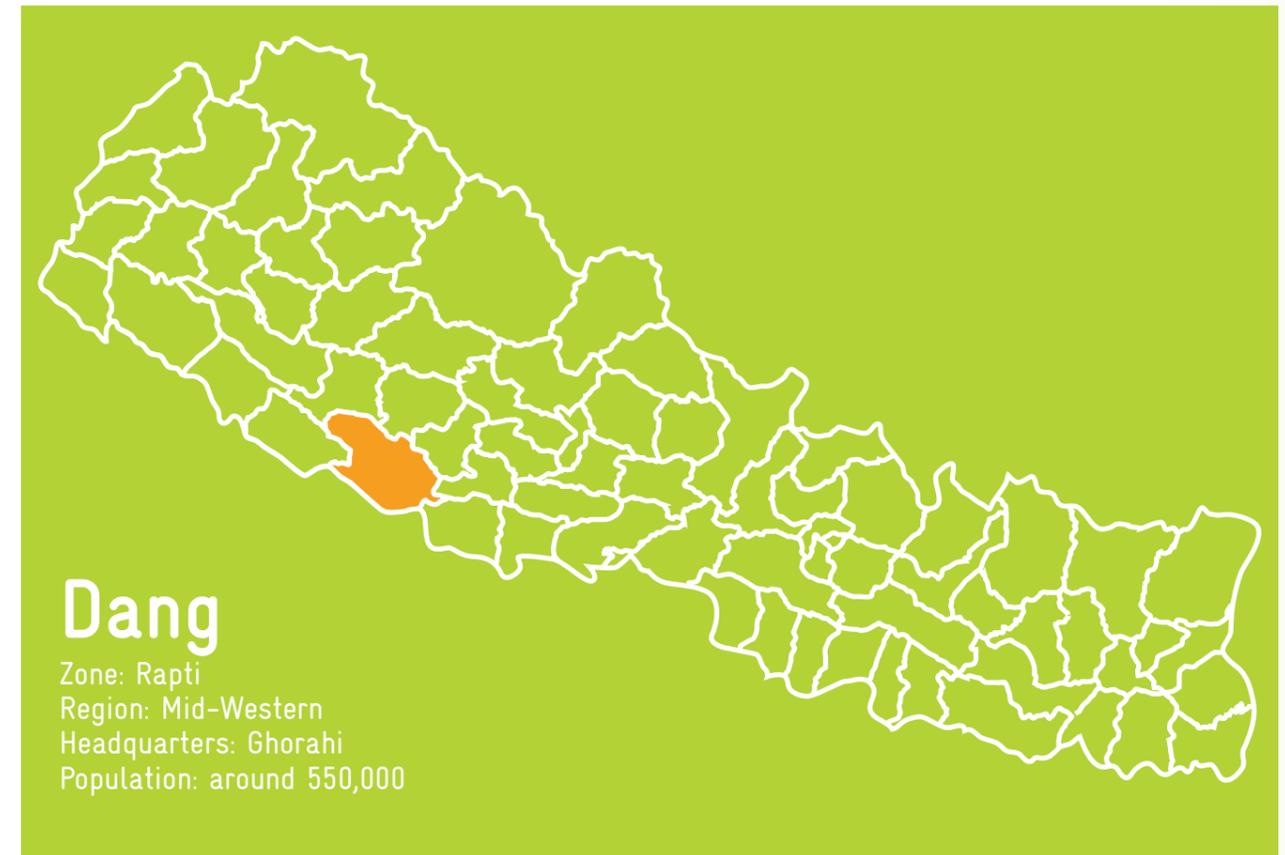
bought from local production. The idea of creating a unique logo for all high quality local products has been raised as a possibility to ameliorate the visibility of local products and increase its credibility. Difficulties have been noticed in communications between farmers and international organisations involved in the honey market development. Thus, FNBK representatives suggest a higher level of communications to facilitate the implementation of new marketing efforts and strategies.

2– Nepal Beekeepers Central Cooperation Union (NBCCU)

In order to facilitate easy access to the market NBCCU was established through an initiative from FNBK. NBCCU is a national organisation involved in the promotion of the honey subsector.

NBCCU recognises the lack of proper quality control in Nepali honey production. Quality control is implemented by private companies selling honey in the Kathmandu Valley but rarely, if ever, by smaller companies or cooperatives, especially for honey distributed to rural markets.

Nepal imports about 144 brands of honey from all over the world mainly from India and China. NBCCU states it is the responsibility of party leaders and up-coming governments to take measures in order to capture the internal, national market, through, for example, tax exemption for wood used in building beehives, which ultimately leads to a more competitive price for honey. In NBCCU’s view, cooperatives are facing financial challenges, which also reflects on the cost of honey, and support for cooperatives is a must.



II Dang

A – Background

Dang District is the most developed and most quickly developing district of the Rapti Zone. Home to two INCLUDE partner cooperatives, Dang has a concentration of independent beekeepers and beekeepers who work for larger companies. Thus, it is highly logical to believe that expansion of the honey market in the district is not only possible but should be happening, especially due to the increasing number of inhabitants. However, having a common border with India, many in the district tend to choose Indian products over Nepali and local products. Particularly as Indian products have a higher level of certification from different trustworthy organisations (WHO, etc), and tend to be lower in price. Despite a basic knowledge of local honey production, the locals of Dang, particularly those in urban areas, prefer the

bigger brands and/or international brands. In the rural areas and areas surrounding the cooperatives, the tendency seems to be changing towards a preference for local honey. The main brands available in Dang are Dabur, Glucovita, Patanjali Honey, Shiva Shakti, Race and Cooperative Honey.

B –Partner cooperatives

Ambikeshwori Beekeeping Cooperative

The cooperative has two permanent employees and regroups 53 farmers in the area of Ghorahi. Honey production is the sole activity of the cooperative. In 2012 it produced 1,527kg of honey with its lowest production during the period January-February and highest during the period November-December. Honey produced under

the simple name Ambikeshwori Sahakari Maha, is available in 1kg and 500gm plastic pots labelled or not (the non-labelled honey is sold in the local market, mostly directly to the consumers who bring their own pot) and is made from chiuri (butter tree), mustard flowers and mixed flowers. Their honey is mostly brown in colour and liquid with possible crystallization according to the weather and temperature in the cooperative and shops. The species of bee for honey production is the *Apis Mellifera*, allowing the highest production of honey per hive. The cooperative sells first to hotels and restaurants, then directly to consumers, local shopkeepers, and part of the production is dedicated to export to Kathmandu. Manufacturing date and other details is not always specified on the label. Honey from all farmers is mixed together with no control system in place to follow the production of each farmer. Honey candies are also produced.

Narijagaran Multipurpose Cooperative

Alongside the production of vegetable seeds for commercial purposes, this cooperative is dedicating less than 25% of its total productions to honey and honey products. They collected up to 10 quintals of honey in a year from *Apis Mellifera* (which has a higher production than local bees). They only produce mustard honey but are developing the production of chiuri honey having recently acquired the help of a specialised technician. Their honey is 'brandless' and sold as such in the local market mostly directly to the consumers. When not in an open form of packaging (the consumers bring with their own pot) they provide plastic pots of 1kg and 500g. They do not keep records of the origin of honey and amount per farmer. (25 farmers are involved in the production of honey for the cooperative)

Focus group discussions

Several points were raised during the focus group discussions with farmers and other actors in beekeeping production of this district. Firstly, all agree on a general lack of knowledge and awareness about honey in general, and locally produced honey in particular. The idea of a pamphlet or live advertisement was then suggested. They also argue on the use of sugar to feed their bees as *Apis Mellifera* bees cannot survive in the winter season as they are unable to find flowers in this season; thus, the importance of seasonal sugar feeding.

The lack of unified labelling as well as the lack of professionalism in the packaging methods have both been pointed out as potential reasons for the difficulty in improving the sales of local honey and, more particularly, cooperative honey. With the high number of consumers being bus passengers, it is necessary to have a label that stands out to increase the attractiveness of cooperative honey for the passengers who, because they are unaware of the different products, take whatever comes along first. They realise that in recent years, more and more consumers are asking for smaller pots to do so also means an increase in the cost of the packaging and labelling.

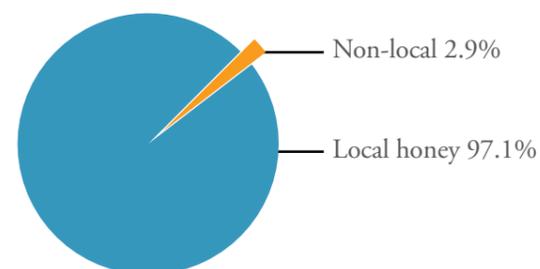
C – Survey summary

Consumer survey results

Consumption of honey per month	Bee Hives (number)
Less than 1kg	42.9
1kg	37.1
2kg	17.1
5kg	2.9
Total	100

Brand of honey people normally buy/eat	Percent
Cooperative	17.1
Dabur	5.7
Homemade	5.7
Other local	57.1
No idea	11.4
Rukum	2.9
Total	100

Do you prefer local or non-local brands?



Why do you prefer local brand?	Percent
Community	2.9
Healthier	17.1
No opinion	17.1
Organic	2.9
Original	5.7
Pure	5.7
Tastier	45.7
Texture	2.9
Total	100

Local honey is mainly praised for its taste and health benefits and also for the idea of purity (linked to the idea of organic and original product). In the rural areas, it is easier to find people producing their own honey or buying directly from the farmer thus skipping the involvement of cooperatives or other third parties. The main use of honey in households is for beverages and food (74.3% stated it as the main or only use of honey in their household), while a minority use it for medicinal purpose, either as part of an Ayurvedic treatment or in the cold season for its energising and soothing properties. A few stated the use of honey as a replacement of sugar helping losing weight.

Hospitality businesses

Hospitality businesses interviewed are all using local honey but only one could recognise the honey as cooperative honey and some sell local honey to travellers and other occasional consumers. Local honey is chosen based on quality, availability, price and reputation. All buy directly from producers except one who buys from the nearest retail shop. Data related to marketing strategy and products is given in Section VII.

Retailers/shopkeepers

There are a few big grocery shops in Ghorahi but no really big supermarket. Most of the shops selling honey are small grocery and retail shops, medicine shops and shops specialised in Ayurvedic products.

The honey available in shops is mainly branded non-local honey such as Dabur or Glucovita but many

Fig 3 Glucovita honey in local shop



Fig 4 Bhimsen shop in Ghorahi



shops also keep local honey products and sometimes their own brand (mostly for shops specialised in Ayurvedic treatments). The other well-represented brand is Race Honey. While very few have any idea about locally produced honey, most of them know the local cooperatives and local producers and are ready to promote local products by appropriate placement on the shelves, advertisements and direct recommendation to consumers. As the quality and consistency in quality and supply are considered by the shopkeepers to be among the most important things when choosing a product, they still sometimes lack trust in locally produced honey against the international well-labelled brands.

Even with the increase in awareness of honey products in general, and cooperative honey in

D – SWOT analysis and case study conclusion

Strengths	Weaknesses
<ul style="list-style-type: none"> Local and cooperative products are already known by consumers and retailers. The development of <i>Apis Mellifera</i> colonies increased the amount of honey produced. The cooperative at Gorahi is self-sufficient in the entire process of commercialising honey, from ensuring purity to packaging and labelling. Beehives exchange programme. Development of new products is going-on. The use of local honey and cooperative honey is already part of the everyday life of many consumers in the cooperative's direct surroundings and the producers and many professionals (hospitality businesses and retailers) give their assurance of being ready to help the promotion of locally produced goods. 	<ul style="list-style-type: none"> There is a certain lack of production management in the cooperatives. There is no consistency in the amount of honey produced of each type and no efforts to develop clean and nicely labelled packaging. The volatility of a large section of consumers (bus passengers) makes any prediction of sales very difficult. The general production remains low and cooperatives admitted not being at the highest production rate possible. There is a general lack of awareness on locally produced honey and cooperative honey. Lack of communication and coordination with the different subsectors of agriculture. Lack of organisation in the local shops and lack of attractive displays in the shops.
Opportunities	Threats
<ul style="list-style-type: none"> Many are interested in learning about honey making and usages with accent on local products. Possibility to create small partnerships with local business for the continuity of the promotion of local honey and more especially cooperative honey. Farmers are ready to join or participate more in the cooperative organisation. 	<ul style="list-style-type: none"> Problems linked to deforestation and degradation of environment in the district. Lack of transportation infrastructure to help farmers to be more involved in all cooperative activities and even to ameliorate their profit on the honey they produce. Constant threat from the poor political situation of the country. Lack of materials to improve packaging

particular, the lack of coordination among farmers, cooperatives and between shopkeepers, hospitality businesses and the cooperative tend to discourage long term marketing strategy. The farmers and cooperatives prefer the more traditional networking (buying from/selling to friends and family) and a word-of-mouth system. They believe their marketing

strategy is more necessary for the export of their goods to the Kathmandu Valley where consumers demand better packaging and diversity and consistency in a quality, tasty and hygienic product.





III KAILALI

A – Background

Among the honey producing areas, Kailali District is the most rural. A big part of the district is covered by some of the largest national parks in the country, namely Kailali National Park and Dudhwa National Park. The production of honey is coming both from *Apis Mellifera* and *Apis Cerana* with a large preference among consumers and even beekeepers for the *Apis Cerana* which produces a higher quality of honey. There is increasing use of *Apis Mellifera* in order to produce more quantity since demand is high. The lack of proper transportation infrastructure leads independent beekeepers to plan lengthy travels to the urban part of Kailali to sell their products and most of them don't generate any profit during these trips and face

difficulties entering the local market. This is one reason why many farmers decided to join a cooperative or supply to bigger brands.

B – Partner cooperative

Pragatisheel Cooperative

The cooperative (Fig. 5) has three permanent employees and 86 member farmers among which about 40 to 50 are regular in their supply of honey. Honey production is not the sole activity of the cooperative. Its representatives consider that about 15 to 20% of their activity consist of saving and credit services to the farmers and the rest is dedicated to the production of honey. The total amount of honey produced per year is around 5,000kg, with the lowest production months being

July-October and January-February. The cooperative considers that their honey production is not at maximum capacity, with the possibility of producing up to 10 times the amount. They sell mainly directly to the consumer and to a few specific shops as well as to the members of the cooperative.

The honey produced is a mix of all farmers honey but they produce two main different types of honey: chiuri and mustard, with occasional mixed

Fig 5 Pragatisheel Cooperative, Kailali



flower honey. They offer a wide range of packaging possibilities: 100g, 250g, 500g, 1kg and loose packaging, all in plastic and with an inner aluminium seal and outer plastic wrap seal. Going from sweet (mustard) to very sweet (chiuri) honey, the colour of their honeys differs from one product to another, from slightly reddish to golden brown. The label contains minimum information: manufacturing date, name of the cooperative and best before notice. The representative of the cooperative showed a great interest in developing their production and their marketing strategy to be more prominent in the local market and in Kathmandu. The cooperative is, however, facing important limitations: lack of consistency in leadership with frequent changes of president and board, and inability to buy all the honey that is brought to them are the main causes of the relative stagnation of the production.

Focus group discussion

Participants unanimously pointed out the high

possibility of increasing the production of honey. Many young farmers showed willingness to join the cooperative system. Many cannot do their own marketing and find the cooperative system the best way to sell their products at a competitive price. All also mentioned the increase in production in the past two years due to donations of beehives and general augmentation of beehives in the district. They feel there is lack of coordination among farmers and cooperatives and absence of a common marketing strategy. More broadly, they are interested in developing a marketing strategy that could benefit not only to the cooperative but other local producers.

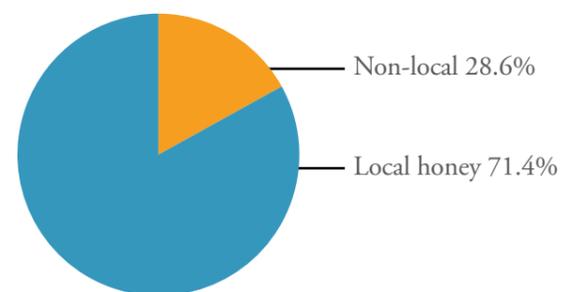
C – Survey summary

Consumer survey results

Consumption of honey per month	Percent
Less than 1kg	37.1
1kg	34.3
2kg	20
4kg	2.9
5kg	2.9
6kg or more	2.9
Total	100

Brand of honey people normally buy/eat	Percent
Brandless	28.6
Cerena	8.6
Cooperative	42.9
Dabur	8.6
Homemade	11.4
Total	100

Do you prefer local or non-local brands?



Use of honey products	Percent
Food	62.9
Beverages	8.6
Ayurvedic treatments	25.7
Other health treatments	2.9
Total	100

Why do you prefer local or non-local brands?

Reason	Local	Non-local	Total
Availability	1	0	1
Certified	0	7	7
Cheaper	2	0	2
Community	2	0	2
Consistency	0	2	2
Healthier	1	0	1
Hygienic	0	1	1
Medicinal values	3	0	3
NA	1	0	1
Pure	6	0	6
Quality assurance	5	0	5
Tastier	4	0	4
Total	25	10	35

The main reason for choosing non-local honey over local products is the idea that being non-local, the bigger national or international brand provides some kind of assurance that the product is certified by higher authorities and is thus more trustworthy.

The consumption of honey in rural households is higher than in the urban area and most of the families, when not buying from their local shop, get their honey directly from the producer or from the cooperative itself.

Hospitality businesses

Most of the hospitality businesses have no or very little use for honey as there is a negligible demand from their customers. Only one restaurant serves honey based beverages, the reason being that the Cerana Honey he buys is produced by one of his relatives. Owners of

restaurants have little knowledge of the use of honey in food and beverages except for the classic tea with honey. They all know about the local production of honey: some know that honey is produced locally but don't know about the type of honey, the producers, the quality, the cooperative, etc., while others know more and disagree on quality and consistency of local products, some believing that local products are tastier and healthier while other believe the same for non-local products. Data related to marketing strategy and products is given in Section VII.

Retailers / Shopkeepers

Most of the shops keep Dabur Honey and cooperative honey on their shelves, rarely any other brands. Dabur Honey is usually present due to the gifts from Dabur of free honey, at least at the beginning of the partnership between the Dabur dealers and local shopkeepers. They usually buy local products directly from the cooperative or the producers. Some shopkeepers admit not keeping cooperative honey on their shelves as the texture changes over time and often crystallises making it difficult to sell.

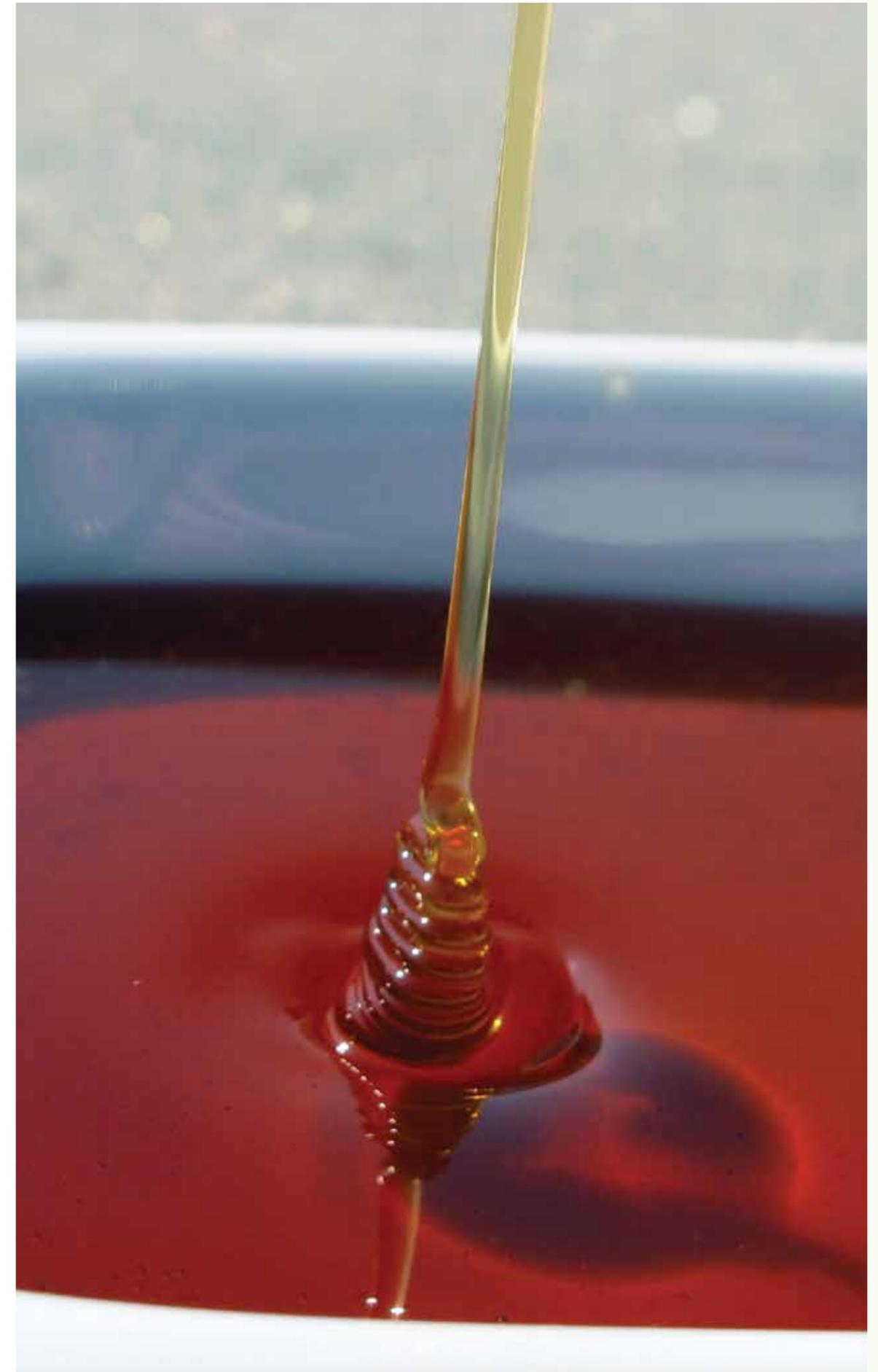
The main reason for choosing non-local honey over local products is the idea that being non-local, the bigger national or international brand provides some kind of assurance that the product is certified by higher authorities and is thus more trustworthy.

D – SWOT analysis and case study conclusion

Strengths	Weaknesses
<ul style="list-style-type: none">• Present knowledge of local production from individual consumers.• Great energy from the representatives of the cooperatives and the farmers to increase their production and improve networking and marketing strategies.• The quality of <i>Cerana</i> honey.	<ul style="list-style-type: none">• Lack of communication among farmers and between producers/cooperative and consumers, especially hospitality businesses owners.• Lack of coordinated efforts for the marketing of local products.• Misunderstanding over texture/crystallisation and quality of a honey.• Lack of consumers compared to the possible total amount of honey production.
Opportunities	Threats
<ul style="list-style-type: none">• The common and unanimous will of farmers, cooperative representative and local business to work together for the promotion of locally produced honey.• The possibility of expansion of production of the same quality.	<ul style="list-style-type: none">• The lack of stability of leadership in the cooperatives.• The general and constant threat due to the poor political condition of the country.

Generally, the honey produced locally is sold or consumed in its entirety and there is no wastage as such but this is mainly due to the fact that less quantity is produced by the cooperatives and farmers to ensure it is all sold. The lack of infrastructure and communication in general between farmers,

cooperatives, buyers, etc. keeps the local honey market largely influenced by international or at least non-local brands. However, the energy of the farmers especially those involved in the cooperative makes it possible to imagine marketing plans and production plans that could not be possible otherwise.





IV PYUTHAN

A – Background

Pyuthan is a traditional beekeeping and honey production district. Apis Cerena comes from this region of the country and adapts well to big changes in weather and temperature throughout the year. However, recently chiuri plants are dying due to high use of pesticides in the cultivated areas that represent a large part of the district. The use of chemical products not only reduces the amount of flowers to feed the bees but also increases the number of potential diseases for the bees themselves. The bees are then treated for these diseases, and cannot be relied on to produce organic honey. Added to these difficulties is the risk of drought that happens about every three years.

Different flavours of honey are produced: chiuri, sass, mustard and phapher. Mostly local honeys are sold in the cooperative,

departmental and dairy stores, as well as for Ayurvedic purposes.

B – Partner cooperative

Airawati Multipurpose Small Farming Cooperative

Beekeepers sell their product to the market if they get higher prices than from the cooperative. There is no regular involvement of beekeepers in the cooperative or guarantee that these honey producers will always or solely sell their products to the cooperative. The cooperative has four permanent staff and 146 members involved in the honey production. The production of honey counts about 35% of the total goods produced and/or sold by the cooperative, the rest being ginger and other agricultural products. The

Fig 6 Pyuthan's cooperative shop



cooperative also provides savings and credits services. The total production of honey in 2012 was around 2,500kg. The total amount of honey going through the cooperative varies greatly according to the season and the ability of the beekeepers to sell directly to the market. No clear record of the honey sold and its provenance has been kept. As all the production is sold without much problem, the representatives of the cooperative never felt the need to keep records. The honey is usually sold directly to individual consumers, then to the hospitality business and retailers/shopkeepers. Honey from both *Mellifera* and *Cerana* is available in different plastic pots (250g, 500g, and 1kg) or loose. During the months July-August, the honey from cooperative is too moist and produces a type of foam that makes the honey look bad and slightly bitter. The cooperative representative noticed the increasing demand of rudilo honey in the local market. The cooperative has its own shop (fig. 7) to sell all its products; the cooperative honey is usually sold there unlabelled.

Focus group discussion

Beekeepers are breeding honeybees following the traditional and old methods. People are involved in beekeeping activities to cover nominal household expenses. Some of them are professional beekeepers and practice beekeeping as their sole profession. They have been practicing this profession for a long time, with knowledge being passed down from their elders.

According to a cooperative representative, the cooperative sells its products in local market. There

is no particular price rate. If there is less production, local shops will pay a higher price for the product or vice-versa. The cooperative makes, bottles, and packages the honey with a guaranteed weight while individual producers sell the honey loose or in unlabelled pots. Local shops and hotels pay a higher price than the cooperative thus the beekeepers usually sell their products directly to them. There is no standard packaging and the quality of the honey might change due to the low quality of sealing and pots used. There is a slow shift from *Cerana* to *Mellifera* and from traditional and old methods of honey production to modern methods.

C – Survey summary

Consumer survey results

Consumption of honey per month	Percent
Less than 1kg	14.3
1kg	42.9
2kg	21.4
3kg	14.3
5kg	7.1
Total	100

Brand of honey people normally buy/eat	Percent
Brandless	14.3
Homemade	7.1
Local branded	78.6
Total	100

Use of honey products	Percent
Food	64.3
Beverages	28.6
Other health treatments	7.1
Total	100

Why do you prefer local honey?

Use of honey products	Percent
Healthier	35.7
Pure	21.4
Tastier	42.9
Total	100

There is a clear preference for locally produced honey by the individual consumers but they regularly express their dissatisfaction due to the texture and aspect of the local honey that crystallizes quickly.

Hospitality businesses

Hospitality businesses are generally approached by the producers themselves or get their honey from the cooperative van going through the city and villages with speakers advertising their products and giving samples. Thus, they do not or rarely use any other products than local ones. However, their use of honey is limited due to the low demand from consumers for honey based beverages or food. In some months, especially winter, consumption of honey is higher and the hospitality businesses increase, sometimes by three times, the amount they buy.

Retailers/shopkeepers

Local shopkeepers buy and supply local honey 'brandless' and unlabelled. They usually fill pots directly from the producers or from the cooperative and do not store it in any specific way. Thus, the honey displayed is often moist and crystallized. The only other honey available is Dabur but preference from the shopkeepers is for locally produced honey and other products. They can sell up to 50kg of honey in a month for the best seller and a minimum of 10kg for the worst. They usually give the consumer

a chance to taste the honey before buying, thus it is important for them to always have the choice to sell unlabelled and/or loose honey.

There is a general clear preference for locally produced honey, thus marketing efforts are at a minimum. Marketing efforts need to be thought through properly. The importance of quality control and consistency has been raised and questioned by all persons interviewed - buyers and producers.

Fig 7 Unlabelled local honey and cooperative honey in local shop



D – SWOT analysis and case study conclusion

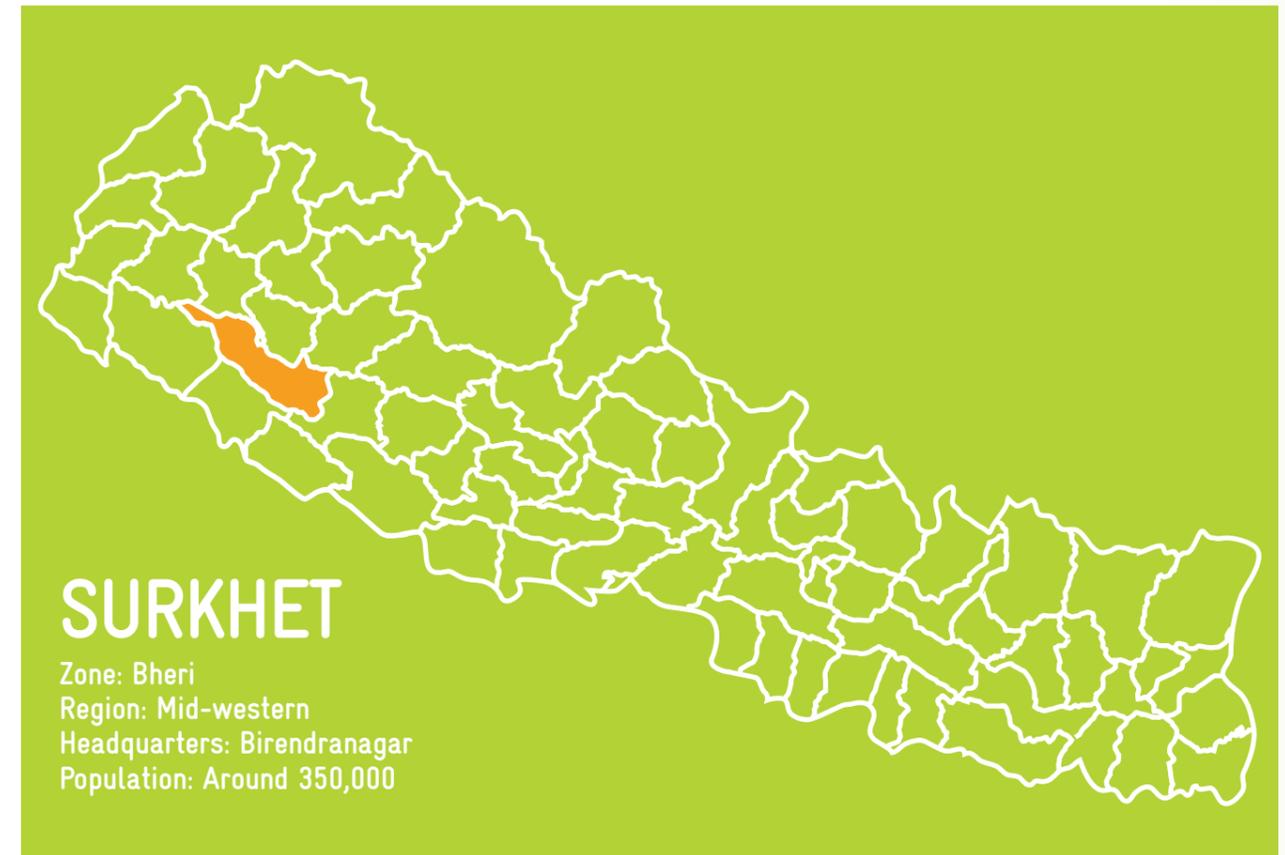
Strengths	Weaknesses
<ul style="list-style-type: none"> Local honey products are well appreciated by the market. The production of honey remains high per producer. The demand for local products is constant with a tendency for augmentation. There is a real sense of community in the honey market with a strong will from both producers and buyers to protect the market for local products to the maximum. 	<ul style="list-style-type: none"> No coordination among farmers, producers and cooperative. No proper record of involvement of farmers in the cooperative particularly in terms of production of honey, etc. No proper packaging, packaging techniques and efficient machinery is available. No proper coordination for pricing, resulting in farmers selling individually instead of in a group combining marketing and sale efforts. No proper quality control.

Opportunities	Threats
<ul style="list-style-type: none"> • Strong will to improve packaging and labelling. • Possibility to increase production. • Deep attachment of buyers to the locally produced honey. 	<ul style="list-style-type: none"> • Lack of communication and transportation infrastructure may make efforts to bring farmers together useless. • Lack of a strong will to belong to a cooperative due to the risk of selling products for less and resulting decrease in earnings. • Volatility of prices of local products. • Constant threat from the unstable political situation of the country. • Risk of quality consistency problems. Risks in lack of marketing efforts by all.

There is a general clear preference for locally produced honey, thus marketing efforts are at a minimum. Marketing efforts need to be thought

through properly. The importance of quality control and consistency has been raised and questioned by all persons interviewed - buyers and producers.





V SURKHET

A – Background

The production of honey has reached its highest in the last three years with a tendency toward the modernisation of beekeeping practices as well as the introduction of *Mellifera* bees to compensate for the low productivity of *Cerana* bees. The district is also increasing efforts in order to attract tourists and investors using, for example, the development of a website dedicated to the presentation of the district for Nepalese tourists as well as foreigners. It is expected that the increasing tourism activity will pull up sales of local products such as local organic honey. The district's agriculture sector is the most prominent of all activities and depends greatly on weather conditions that have not been good for crops but did not impact as much honey production. Apart from the cooperatives,

single producers can sustain their activity on their own such as Acharya Bee Farm, owning around 30 beehives and printing its own labels.

B – Partner cooperative

Kakrebihar Cooperative

The cooperative has honey production and beekeeping tools development and sales as its sole activities with a yearly production of honey around 4,500kg. The honey is sold loose or under the brand name Kakrebihar Beekeeping in plastic pots of 100g, 250g, 500g and 1kg in different forms from very liquid to very crystallised, usually very sweet. All pots are sealed using a tape-heating system. No testing is done on the product coming from around 235 farmers and except for wax, no product diversification is currently done or planned to

be done. The cooperative sells mainly directly to the consumers and dairy shops and occasionally to bigger traders.

The cooperative representatives recognize a strong lack of management in the cooperative and consider it one of the main priorities, along with the development of a marketing strategy. Many of the farmers involved in the cooperative were, or still are, under the poverty line and started beekeeping as a side activity to improve their general standards of living. Technical training is required to increase awareness and for commercial development of beekeeping.

The cooperative honey, which is labelled, has pictures on the labels of the comic duet Madan Krishna Shrestha and Hari Bansha Acharya, giving a feeling of quality certification to the consumers.

Focus group discussion

The shift toward *Mellifera* honey has been questioned as most of the consumers have a clear preference for *Cerana* honey and are not always interested in buying honey at a lesser price if they feel it decreases the quality of the product in some way. A general lack of information given to the consumers has been noticed and makes some of the honey very difficult to sell (i.e. mixed flower honey is not considered pure due to the lack of information on the definition of purity for honey products)

There is debate among farmers on the presence of a picture of comedians on the honey label as some of them do not relate the product with the characters and prefer a radical change of label for one including images of bees, wax, etc.

The bee migration that must occur in the monsoon is made very difficult due to poor development of the roads.

C – Survey summary

Consumer survey results

Consumption of honey per month	Percent
less than 1kg	20
1kg	28.6
2kg	25.7
3kg	14.3
4kg	11.4
Total	100

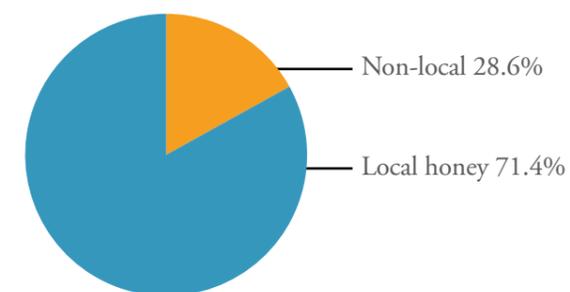
Brand of honey people normally buy/eat	Percent
Acharya	2.9
Brandless	20
Cooperative	42.9
Dabur	14.3
Homemade	14.3
NA	2.9
Race	2.9
Total	100

Use of honey products	Percent
Food	45.7
Beverages	8.6
Ayurvedic treatments	28.6
Other health treatments	17.1
Total	100

Why do you prefer local or non-local brands?

Reason	Local	Non-local	Total
Availability	2	0	2
Certified	0	7	7
Employment opportunities	0	1	1
Habit	1	0	1
Healthier	2	0	2
Loyalty	1	0	1
NA	2	1	3
Price	2	0	2
Pure	5	0	5
Quality assurance	3	0	3
Reliability	2	0	2
Safer	0	1	1
Tastier	5	0	5
Total	25	10	35

Do you prefer local or non-local brands?



Though the majority of consumers prefer local honey all would prefer a quality certification from a higher authority as they believe that international or bigger brands have such certification. They usually don't understand that crystallised honey or honey without comb can be as pure as any and still carry the same health benefits.

Hospitality businesses

Hospitality businesses rarely use honey in their menu and those who do are buying it directly from the cooperative or local producers, with preference to honey produced by their friends or relatives. All those using honey are asking for a better packaging overall

with the use of glass instead of plastic to avoid the plastic smell spreading in the honey.

The restaurants and hotels that are not using honey blame a lack of interest from the consumer for honey related food and beverages. But all agreed they will promote, as a retailer, local honey and other local products if the profit margin is right.

Retailers/shopkeepers

Most of the local shops keep local honey on their shelves but many also have other brands such as Race and Dabur. The majority of local shops agree that keeping plastic pots is better to avoid any breakage but the packaging of Dabur and its glass pot looks more professional and trustworthy. Also it has been noticed that the cooperative honey crystallises often and quickly making it almost impossible to sell. All agree on promoting local honey products but recognize that it is easier to promote Dabur or other bigger brands due to the consistency in the taste and texture of the honey and the marketing materials provided by the brand's representatives.

D – SWOT analysis and case study conclusion

Strengths	Weaknesses
<ul style="list-style-type: none"> Local honey products are well appreciated by the market. The production of honey remains high per producer and farmers are willing to produce more. There is a real will to improve general management of the cooperative, as well as the communication and marketing strategy, etc. 	<ul style="list-style-type: none"> No coordination among farmers, producers and cooperative. Inadequate human resources in the District Agriculture Office in Surkhet and no one is trained in beekeeping there. No proper packaging available. Packaging techniques and efficient machinery is not available. No proper quality control; farmers demand a scientific lab in their district.
Opportunities	Threats
<ul style="list-style-type: none"> Strong will to improve packaging and labelling. Possibility to increase production. Deep attachment of the buyers to the local production. 	<ul style="list-style-type: none"> High competition even among local producers. A lack of stability of leadership in the cooperative. The general and constant threat from the poor political condition of the country.



VI SUMMARY OF FINDINGS

A – Summary of findings applicable to all districts

There are many similarities in the four districts visited for this study, with regards to the cooperatives, the market in general and the market's response to locally produced goods, more specifically natural honey.

About the cooperatives

All of them lack proper management or system that would allow a real follow-up on the producers and their productions. Whether the number of members is increasing, decreasing or stable, there is a constant lack of trust among the cooperative head and members, as well as among members themselves. Often judged too political by members, they do not focus on production and quality and almost never try to implement quality control at their own level.

Most members prefer selling their products directly to the consumers or to other trading agents who offer them a better price and the assurance of buying the whole production. On the other hand, cooperatives mostly do not buy the whole production, and what they do buy is at a lower price.

About the market

A general lack of knowledge about honey has been observed in all districts, particularly Kathmandu and Pokhara markets. The use of honey in the hospitality businesses is scarce locally but quite important in Kathmandu and Pokhara.

About locally produced honey

Again there is a general lack of knowledge of the product itself with a misunderstanding over the term 'pure'. Even if the honey produced locally is trusted by the locals who are ready to buy it

without proper packaging, label, etc., other markets are not, and need a better certification process.

There are mixed feelings about the honey produced and packaged by the cooperatives. While some argue that the quality is lower because of mixing of several honeys from several producers, others recognise that the cooperative process ensures certain regularity in the product. The packaging using the comic duet MaHa Jodi has received both negative and positive reactions (mostly positive in Kathmandu and Pokhara markets and often negative in the local markets).

C – Market potential

The market for honey in rural areas of Nepal has the advantages of being capable of increase in production and the overall sales. The production could be increased

by almost all producers met in the field and there is a rising awareness in the population about the benefits of honey and a real will to learn more about it.

Generally, the main weakness of the locally produced honey is the lack of quality control, and thus lack of consistency in quality. Lack of marketing tools and no general marketing strategy; lack of diversity in the proposed products; lack of communication, and thus coordination among actors, at every level, are also major weaknesses.

A proper marketing strategy following the rule of: product first, place second, promotion third; has to be followed. Firstly, the quality and consistency of the product should be there, the market place should be found and then promotion through different marketing tools should be development.

The last section of this report aims to provide ideas and tools to develop these steps.

B – General SWOT analysis in orange as in others

Strengths	Weaknesses
<ul style="list-style-type: none"> Local honey products are well appreciated in the market. There is a real will to improve general management of the cooperatives, communications, and marketing strategy, etc. Machinery for the production of quality honey is present in the cooperatives. Presence of organisations such as NBCCU or FNBK to centralise and coordinate information and actions. Natural honey consumption remains high and tends to increase at every level. (local, national, international) MaHa Jodi involvement* 	<ul style="list-style-type: none"> No coordination among farmers, producers and cooperative. Inadequate human resources. No proper packaging, packaging techniques and efficient machinery available. No proper quality control on quality control process. Low production overall. Lack of knowledge on locally produced honey at the district, national and international levels. Lack of coordination between organisations, cooperatives, local producers, etc; lack of organised communication among them. MaHaJodi involvement*
Opportunities	Threats
<ul style="list-style-type: none"> Strong will to improve packaging and labelling. Possibility to increase production. Attachment of the buyers to the local production. Beekeeping as an attractive activity for generating additional income. 	<ul style="list-style-type: none"> High competition even among local producers. The lack of stability of leadership in the cooperative. The general and constant threat from the poor political condition of the country. Climate changes (short and long term, monsoon, tougher winter seasons, etc.).

*MaHa Jodi involvement is considered both a weakness and a strength; at the moment probably more of a strength but can over time become a weakness or an impossible thing to maintain according to the will of the comedians





VII PROPOSED MARKETING STRATEGY

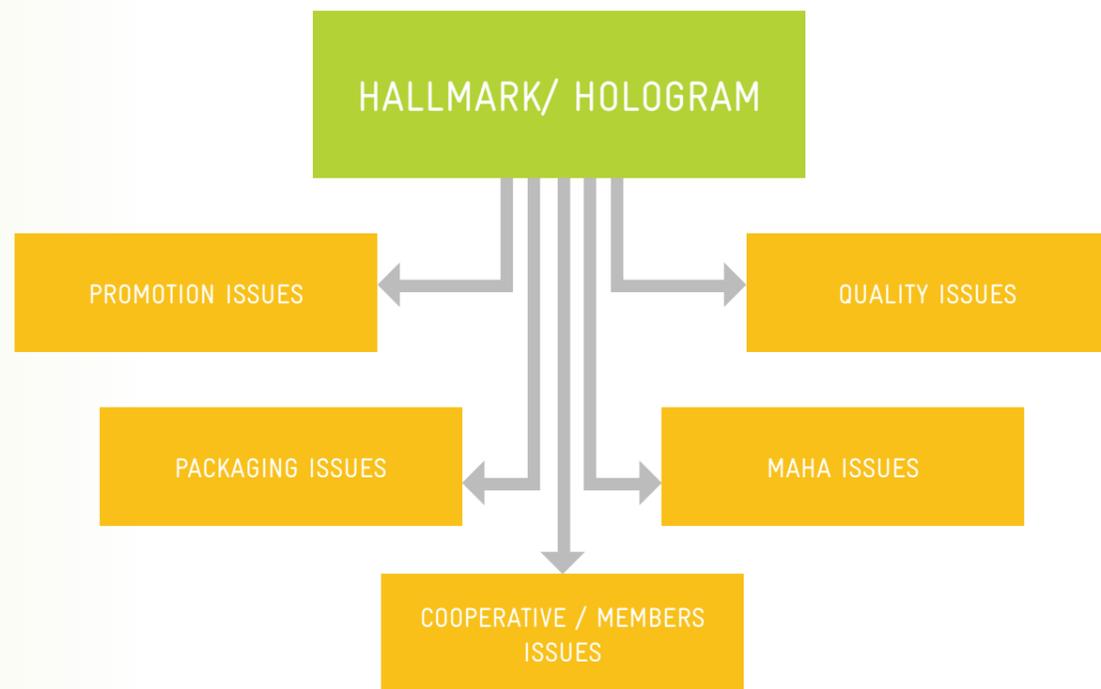
A – Unique selling points

Cooperative honey

- The local market, people do have a very good impression of self-produced cooperative honey. If processing and quality control mechanisms are highlighted to the local consumers it can become the unique selling point, and can then compete with other brands in the market.
- One attractive brand with a good recallable name and attractive packaging can create synergy among all existing cooperative honey producers. This will also give an opportunity to cooperative societies to promote one single brand with much better focus and much bigger strength.

Creating variety within brand

- If brands with a variety tag are created then they can have much better penetration in the market. After understanding the market situation and perception study of the honey producer, it is advisable to create awareness of the varieties available and their benefits. The honey should be sub-branded by flower category rather than geographic region. A recommended strategy is to create a sub-brand ribbon for mustard, rudilo etc. In the local market, people have knowledge of these types of honey and their benefits, so this will be well received.



Hallmark/hologram for quality honey in Nepal

- If there is a quality hologram promoted by the associations and meeting certain benchmarks then this hologram will become an umbrella to bring all honey producers to one single platform.

A quality benchmark for honey, indicated by the hallmark/hologram, will resolve all current issues identified during the field research, such as:

- Members not bringing their honey to cooperatives: they will be encouraged to do so if they see the importance of a hallmark/hologram. In order to obtain this quality assurance hallmark members will have to come to the cooperative, especially as the hallmark becomes widely accepted in the market.
- MaHa Jodi, the celebrity duo are being used by Kakrebihar Cooperative in Surket as their honey brand rather than as brand ambassadors. The duo could be approached to assess if they are willing to promote a hallmark as a sign of assurance covering all cooperatives.
- Since, the issuance of a hallmark will be totally dependent on the quality benchmarking, all

producers will have to meet the minimum standard. This will initiate a process of quality checks; trainings and monitoring etc., which will further ensure quality benchmarks for honey in Nepal.

- With many brands in the market and much effort being put into promoting each brand, the collective effort is scattered and there is no focus for promotion. With a hallmark, there will be a single platform with a quality assurance message for consumers.
- As quality checks will bring the producers to one single platform, there is possibility of bringing a common packaging concept by promoting the idea of recycling the bottles/jars/pots. This will be a cost effective, attractive approach for producers. A central procurement system of containers can bring down the cost of purchase drastically and the recycling concept can further reduce the cost of packaging too.

The proper process to adopt these selling points includes the recruitment of an advertising agency, which has wide experience of creating brand names, slogans and brand packaging for consumer products.

B – Brand development requirements

Branding Cooperative Honey

All cooperatives are currently using the FNBK's label in their packaging and this is not creating ownership among the INCLUDE supported cooperative members. Ownership needs to be created with certain attributes of branding:

- Label colours and images
- Brand name
- Brand identity elements
- Variety

Brand packaging

Along with the brand name the product must get better packaging. Packaging is the key to today's modern market and it will be one of the best competitive edges in the local market for cooperative honey. It may also create synergy among all the member honey producers.

Brand packaging strategy

Consumers seem to prefer glass bottles/jars with larger openings for honey. Outsourcing a single design bottle for all members and selling it with a central pricing strategy can solve the current problem of different bottles and sealing mechanisms. If managed well, these glass bottles can be recycled and packaging costs will be reduced by at least 20%-25%.

C – Communication & promotion plans

Objectives and approach

Communication and promotion activities will follow a two-fold approach, including:

- 1) Consumer awareness raising activities and brand positioning through a variety of local/regional media and local communication channels, and
- 2) Working closely with the producers, traders, especially key buyers, in each target market, to create better visibility, demand and a new concept of quality Cooperative Honey.

Specific focus will be given to achieving the following marketing objectives:

- Build awareness among consumers from local markets and main markets like Kathmandu and Pokhara.
- Further launch and enhance the cooperative honey brand and position it as a distinct quality brand.
- Further develop the consolidated cooperative marketing network to manage demand and supply chain.
- Leverage on new media technologies, social media and web, and develop low-cost marketing activities for bigger markets like Kathmandu and Pokhara.
- Create interest among media and press representatives; initiate and foster media coverage on the new brand and benefits
- Establish strategic partnerships with bulk buyers; key outlets like Bhatbhateni, associations etc.
- Leverage on the high reputation of celebrities and introduce celebrity endorsement activities.
- Create interest among the travel trade in the target markets, especially among outbound tour and trekking operators, who carry clients' food with them.

Due to budget constraints, particular attention will be given to activities requiring lower financial investment. This involves a strong focus on media relations and PR activities, website development, social media and online communities as well as testimonial campaigns.

Furthermore, efforts will be concentrated on developing marketing partnerships and creating opportunities for marketing cooperatives with mainly the key suppliers in each of the target markets, and also with large buyers like restaurants, hotels and associations. This will not only help to save and share costs among marketing partners and exploit synergies, but will also build trust and brand credibility among consumers through mutual endorsement and brand alignment.

D – Positioning

The 'HONEY' Brand

In order to build a consistent brand identity and image in the marketplace it is essential that efforts to position cooperative honey among the targeted consumer audiences concentrate on highlighting its various aspects and unique selling points as follows:

- Cooperative honey produced in different parts of Nepal with natural diversity, which gives a great variety and taste as well as greater benefits to the consumers.
- Each variety based on type of flower has its own significant taste and use, and needs to be highlighted with neck labelling containing details of its benefits.
- The quality assurance hallmark further assures the consumer of the quality of the product.

E – Specifics for branding

Brand identity

The brand name must identify it as a Nepalese brand, with name, association and emotion attractive to Nepalese consumers across the country. It should, however, be a name which is easily promotable to other parts of the world without a pronunciation issue.

Design and colour scheme

A colour scheme has to be developed to represent honey from Nepal and make it easy for consumers to orientate themselves with the brand. The brand colour should be soothing and connected to family colours of honey. The colour scheme must be attractive and acceptable to the local consumers.

Hallmark logo

This should be very simple yet attractive enough to draw the attention of the consumers. The belief factor towards quality assurance through the logo should come out through its design. This should have some symbolic connection with honey and/or bees. It should also have serious look, with an authoritative feeling.

Photography

Photography and visual images are a key part of

a brand. The producers also strongly recommend natural photographs of honey and/or bees and/or liquid honey with attractive natural colours. This should be real photo image, not hand drawn art etc.

Brand slogan

In the Nepalese context a slogan or a bi-line for a brand always helps establish it in the minds of consumers. It is recommended to have an appealing brand slogan that further enhances the image of the brand as well as promotes the unique selling points of the brand.

Trade marketing

According to market analysis results, the honey trade in Nepal is not at all vibrant. This includes cooperative brands under FNBK and other local brands. Both wholesalers and retailers tend to deal through personal relationships only. It is extremely important to create a proper distribution channel and feed the product through it. Packaging small units of honey to medical outlets should be carried out; currently this is not in evidence, except for Dabur Honey. There needs to be proper penetration of the medical market which may give extra opportunities to the current market. It is estimated sales can grow by 15-20% if a distribution channel is established.

Information and education

Developing brand creating channels through proper tools is very important, as below. Activities will precisely include the following:

- Development of specialised publications and information materials targeting the consumers, with background information on the benefits of honey, its relevance to Nepal's climate and nature, uses of honey and health benefits. There should be target specific information, education and communication materials to disseminate these facts to the consumers.
- Neck labels for bottles with product information and benefits tagged on each. This is the best way to communicate with consumers as well as to benchmark the quality of the product.
- Posters for variety specific benefits can also be another promotion tool that can be used in retail outlets.

Cooperative marketing

Most key outlets like big department stores, hotels, restaurants and strategic outlets can become partners in promoting and selling the brand. There should be strategic partnerships created with such outlets and vendors to sell the product. There can be mutual promotional items created in these places to promote the brand like kiosks, stalls, special merchandising units etc.

Consumer marketing

To reach out to specific target group consumers and to create a bigger marketing base the brand needs a central level effort during launch. A proper television campaign along with radio and press campaign will help establish the brand at local consumer level. Shop signage, hoarding boards, posters etc. will also help promote the brand, as will PR and marketing cooperation with interest groups and key outlets. These can also be used to help promote the quality hallmark as an endorsing unit.

F – Communication channels

Primary channels

Above-the-line media like local television channels, FM radio and print media including newspapers and magazines will be the primary media channels to promote the brand and will be supported by public relation activities. Further activities will include the production and distribution of news bites, articles, and benefit driven product orientation programmes.

Secondary channels

Secondary communication channels to be used for promotion of the honey brand/hallmark logo in the domestic market will include social media networks focussing on creating positive word-of-mouth-publicity, as well as celebrity endorsement campaigns, online promotions and others. Merchandise materials (posters, banners and brochures/leaflets) and branded items (caps, t-shirts, give-aways, Nepalese year calendars) can be produced to support campaign and media activities.

G – Resources and organisations

Roles and responsibilities of associations

Associations such as NBCCU and FNBK, along with Nepal Government bodies like the Trade and Export Promotion Centre (TEPC) and the Department of Food and Technology and Quality Control (DFTQC), can come together to devise mechanisms to implement the hallmark concept by creating quality check mechanisms.

These associations can become the governing body for training, quality checks, endorsing the hallmark and monitoring quality issues in the market. They can also be central level procurement platform for cooperative honey.

There is the need to bring all these organisations together to brainstorm and plan for activities. In addition, proper training modules, quality check methodologies and monitoring mechanisms need to be developed.

TEPC can play a vital role in promoting the honey brand in export markets.

DFTQC can play a major role in establishing quality checks and monitoring methods and training the association bodies to carry forward this mechanism.



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