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AFRICAN FORESTRY AND WILDLIFE COMMISSION

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BEEKEEPING VALUE CHAIN DEVELOPMEN IN TANZANIA

INVITED PAPER[1]

I. Background

1. Tanzania is endowed with favourable environment for beekeeping. The sector is yet to contribute optimally despite its estimated potential[2]. The capacity of 9.2 million bee colonies and production potential of 138,000 Metric tons of honey and 9,200 tons of beeswax per annum has been estimated[3]. The 9.2 million honeybee colonies were established in 1957[4]. However, such beekeeping records need further validation given the current environmental changes and beekeeping practices. The Government of Tanzania developed the National Beekeeping Policy (NBP) in 1998. The National Beekeeping Policy enhances sustainable contribution of the beekeeping sector to ensure sustainable beekeeping development, conservation and management of its natural resources. The policies clearly define ownership for all forests and forest resources. The Forest and Beekeeping Acts of 2002 provides the main legal framework for activities in the sector. The Forest Act lays out the legal framework by which various stakeholders can participate. Following Government reforms under Public Service Reform Programme, the Tanzania Forestry Service (TFS) agency was established to

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[2] Match Maker Associates (2007). Honey and beeswax value chain analysis in Tanzania

[3] NBP, (1998). National Beekeeping Policy of Tanzania

[4] Match Maker Associates (2007). Honey and beeswax value chain analysis in Tanzania

take over some of the operational roles and functions of the Forestry and Beekeeping Division[5]. Currently, TFS is the key executive agency in national forestry and beekeeping affairs to ensure efficient and effective management of forest and bee resources.

II. Overview of beekeeping practices and products production

2. In Tanzania, beekeeping is mainly a traditional and rural-based activity by local communities[6]. Good management of hives is critical to increased yield, however very little attention has given to it by beekeepers. On the technological side, most small scale and rural beekeepers use either bark or log hives. The use of improved hives such as top bar or commercial hives and modern processing equipment is increasingly installed and used in the country. According to National Beekeeping Act of 2002, use of bark hive is prohibited. The Government and private practitioners work to promote sustainable beekeeping practices. Various groups are involved in the production value chain including input suppliers i.e. carpenters, metalworkers, tailors, traders who supply beekeeping equipment, printing shops for labels and the various funding institutions.

3. The need to protect crucial forage areas for bees remains critical. Tanzania has set aside and managing 506 natural forest reserves for beekeeping. The Ministry of Natural Resources (MNRT), through its Agency, TFS, a total of 69,613 ha have been protected as National Bee Reserves[7]. Other appealing achievement by Tanzania through its agency (TFS) is its initiative to support beekeepers by providing hives, establishing market linkages and establishing functional demonstration apiaries for farmers to learn by doing. For the period 2012/2015 alone, TFS supplied more than 14, 076 top bar hives to local beekeepers and beekeepers are slowly adopting their use. The prospect for increasing production of honey and beeswax is great. The prospect for increasing production of honey and beeswax is high though little has been achieved at the moment. The old production record is 4,860 tons of honey and 324 tons of beeswax per year, which is only 3.5 percent of the annual production potential of the country[8]. Promotion of adoption to best beekeeping management would boost honey and beeswax production.

III. Production Constraints

4. Bee products production is constrained by various problems:

- Degradation of potential bees nesting habitats and forage for foods;
- Traditionally, beekeeping is mostly done by man as most hives are kept on trees and far from homestead posing managing and harvesting risks;
- Low adoption to improved beekeeping practices;
- Poor management of bee forage resources;
- Unreliable weather patterns, makes difficult beekeepers to predict appropriate seasonal colony development.

IV. Market opportunities

5. The current demand for pure honey and beeswax persistently exceed supply[9]. Pure honey and beeswax is increasingly becoming valuable and expensive commodity. The major market destinations for Tanzanian honey and beeswax are in Europe (e.g. Germany, the Netherland, UK, Belgium and Norway), China, Japan, USA, Oman, and Dubai, and in the sub-Saharan countries to Botswana, Kenya, Burundi, DRC, Rwanda and Uganda. Belgium and Germany have remained the primary

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[5] MNRT, (2014). TFS three years implementation report for the financial year 2011/2012- 2013/2014
[6] NBP, (1998). National beekeeping Policy of Tanzania
[7] MNRT, (2014). TFS three years implementation report for the financial year 2011/2012- 2013/2014.
[8] NBP, (1998). National Beekeeping Policy of Tanzania.
[9] MNRT, (2014). TFS three years implementation report for the financial year 2011/2012- 2013/2014.

buyers of Tanzanian honey[10]. A declining trend for exports of Tanzania honey has also revealed in the past four years. For example in 2010 about 291.4 metric tons were exported compared to 152.6 tons in 2015[11]. However, significant amount of honey is exported to neighbouring countries and is not captured in the official statistics. Estimated honey export to the East African region only could be over 500 metric tons.

6. The demand for bee product never ceases and continues to command good prices[12]. The beekeepers and traders have made little efforts to exploit and sell other bee products such as royal jelly, bee venom and services like pollination services. Markets for bee products are largely dominated by middlemen who move honey and other bee products to the market from distant areas. Very little is paid to the beekeepers. While producer groups are not properly organized, poor networking as well as communications among themselves is greatly affecting their markets[13].

V. Marketing constraints by beekeepers

7. Honey and beeswax markets in Tanzania are constrained by various challenges:

- Beekeepers fail to guarantee consistent supply of products;
- Little access to reliable marketing information and supply of processing and packaging equipment
- Low honey and beeswax production;
- Beeswax processing skills is required as most of the resource is wasted or poorly processed and some untruthful beekeepers adulterate it;
- Honey and beeswax production volumes still low hence difficult to attract bulk buyers and development of collection centers.

VI. Points for consideration

8. The Commission may wish to consider the following recommendations:

- Government and other development agencies establishment of strong beekeepers association will help address various beekeeping production and marketing challenges: enable beekeeping associations financially to generate revolving funds to finance beekeeping operations and enable sustainable operations of beekeepers.
- Introduce and encourage best practices in beekeeping management
- Sourcing market information and disseminating it to stakeholders or producers
- Investigate causes of low production and declining exports so as to develop strategies to meet foreign demand

[10] Match Maker Associates (2007). Honey and beeswax value chain analysis in Tanzania
[11] MNRT, (2014). TFS three years implementation report for the financial year 2011/2012- 2013/2014.
[12] MNRT, (2014). TFS three years implementation report for the financial year 2011/2012- 2013/2014
[13] Match Maker Associates (2007). Honey and beeswax value chain analysis in Tanzania