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## **Stakeholder Mapping of the Beekeeping Sector**

**Prepared by the Export Development Association (EDA)**

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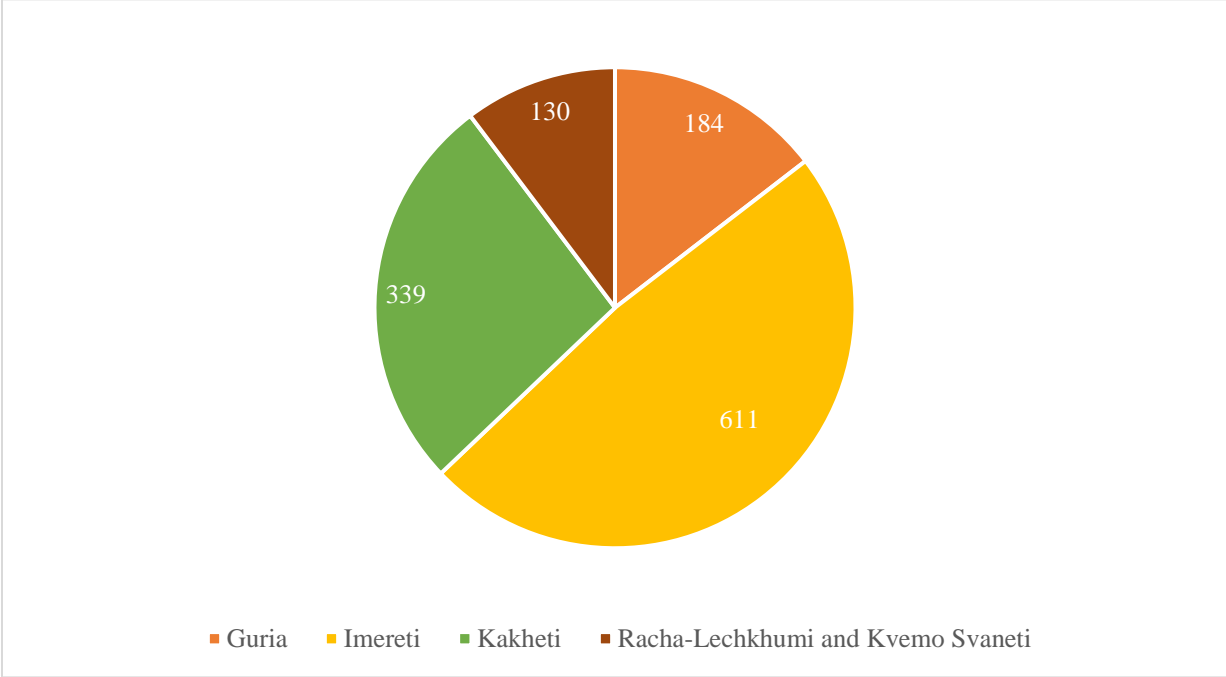
The Export Development Association has collected, compiled and validated data from stakeholders in the beekeeping sector for the following target regions: Imereti, Kakheti, Guria and Racha-Lechkhumi and Kvemo Svaneti. As a result of data validation, the data of primary producers of honey and other value chain actors were clarified.

The data contains personal information about farmers, number of hives, primary and secondary products produced, and annual production volumes. The data also includes information on whether they plan to export their products abroad. The analysis of the above data makes it possible to get a picture of the situation of the beekeeping and honey production sector in the target regions.

### Honey production

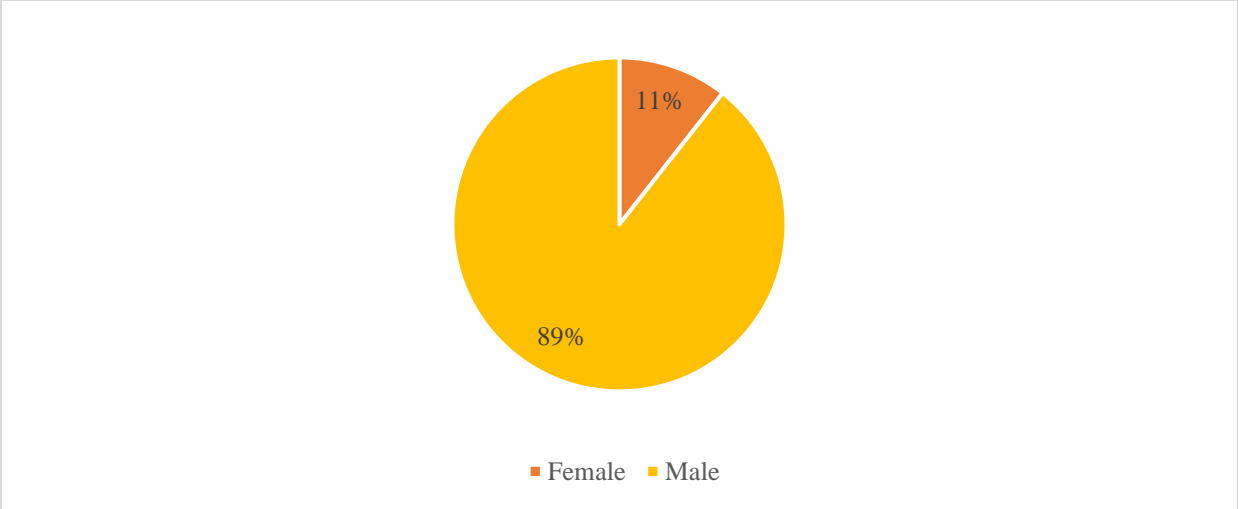
A total of 1,264 active farmers engaged in primary honey production were identified in the regions of Imereti, Guria, Kakheti and Racha-Lechkhumi, and Kvemo Svaneti. The regional distribution of the identified farmers is shown in the first graph. The graph shows that most farmers (611) were identified in the Imereti region, while relatively few farmers were identified in the Guria (184) and Racha-Lechkhumi and Kvemo Svaneti (130) regions.

Figure 1. Honey Producers by region.



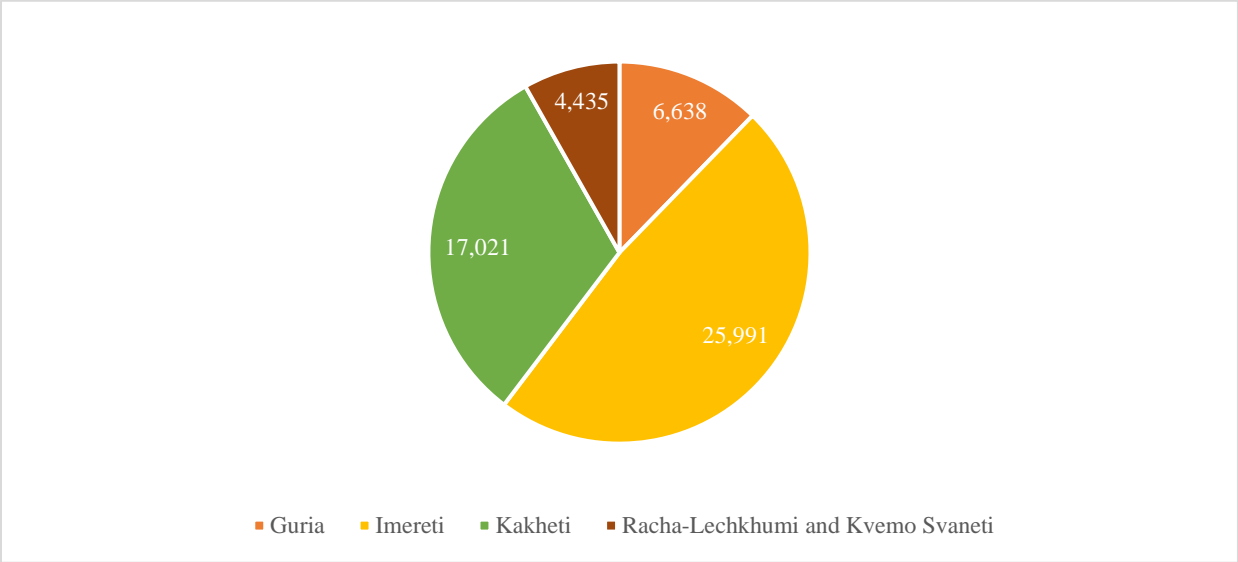
The gender distribution is shown in Figure 2. Figure 2 shows that the share of women in the primary production of honey is only 11%.

Figure 2. Honey producers by gender



For 16 farmers, it is not clear how many hives they have, but of the remaining 1,248 farmers, a total of 54,085 hives were identified in these target regions. The distribution of the total amount of hives by region is shown in Figure 3.

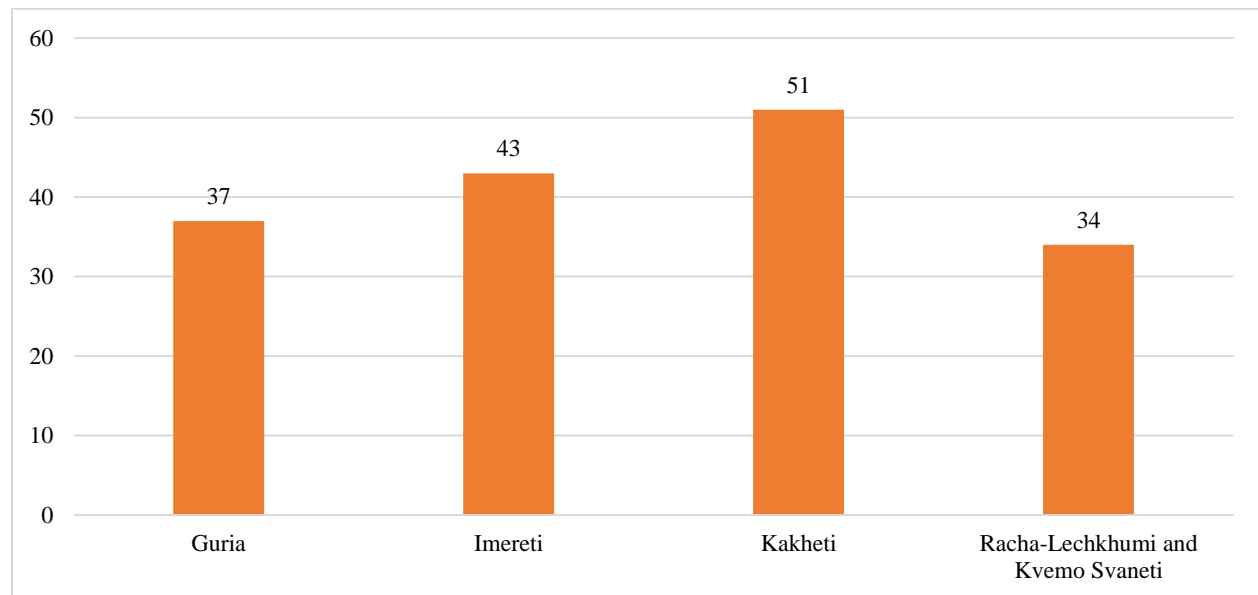
Figure 3. Total number of beehives by region



Since most farmers are from the Imereti region, the number of hives is highest in this region. 48% of the hives of the identified farmers are located in the Imereti region. The lowest number of hives in total was found in Racha-Lechkhumi and Kvemo Svaneti region (4,435).

Figure 4 shows the average number of hives per farmer by region, calculated as the total number of hives divided by the total number of identified farmers per region with at least one hive.

Figure 4. Beehives per farmer by region



As can be seen from the figure, the average farm size in terms of number of hives is the largest in the Kakheti region. The average farmer in this region keeps 51 hives. In contrast, in Guria and Racha-Lechkhumi and Kvemo Svaneti regions there are mainly small farmers with 34-37 hives on average.

Table 1 shows the distribution of farmers among the following ranges: 1-4 hives, 5-9 hives, 10-19 hives, 20-49 hives, 50-99 hives, and more than 100.

Table 1. Distribution of beekeepers by number of beehives and region

<b>BEEHIVES</b>	<b>GURIA</b>	<b>IMERETI</b>	<b>KAKHETI</b>	<b>RACHA-LECHKHUMI AND KVEMO SVANETI</b>
<b>1-4</b>	32	72	18	13
<b>5-9</b>	23	78	30	15
<b>10-19</b>	30	124	84	27
<b>20-49</b>	52	140	86	50
<b>50-99</b>	24	108	72	15
<b>100+</b>	17	80	47	9

As shown in the table, most farmers keep 20-49 hives in each target region.

The main product of all beekeepers who are primary producers is honey. However, as by-products they also produce bee packages, queen bees, wax, propolis, bee bread, hives, pollen, honey vodka, candles, and bee venom.

As for the amount of product produced, the data collected showed annual production. The total and average quantities are shown in Table 2.

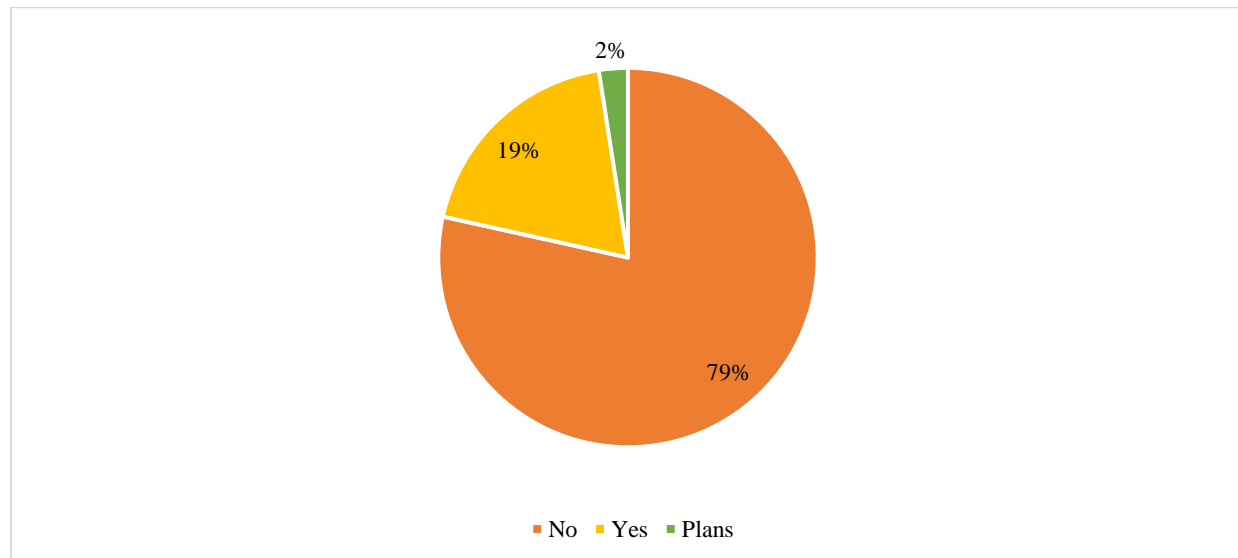
Table 2. Annual honey production quantities, total, per farmer and per hive

Honey	Total annual honey production (kg)	Average annual honey production per farmer (kg)	Average annual honey yield per hive (kg)
<b>Guria</b>	141,099	850	22
<b>Imereti</b>	531,300	888	21
<b>Racha-Lechkhumi and Kvemo Svaneti</b>	104,870	846	25
<b>Kakheti</b>	300,215	910	18
<b>Total</b>	<b>1,077,484</b>	<b>885</b>	<b>21</b>

According to the data, the total honey production of the identified farms is more than 1,000 tons, of which the largest part is in the Imereti region (49%), followed by Kakheti (28%). Kakheti region leads in average honey production per farmer, but honey yield per hive is highest in Racha-Lechkhumi and Kvemo Svaneti region.

Figure 5 shows the percentage distribution of farmers who answered the following question: Do you export or plan to export honey in the near future?

Figure 5. Percentage distribution of identified farmers according to their current and future plans regarding the export

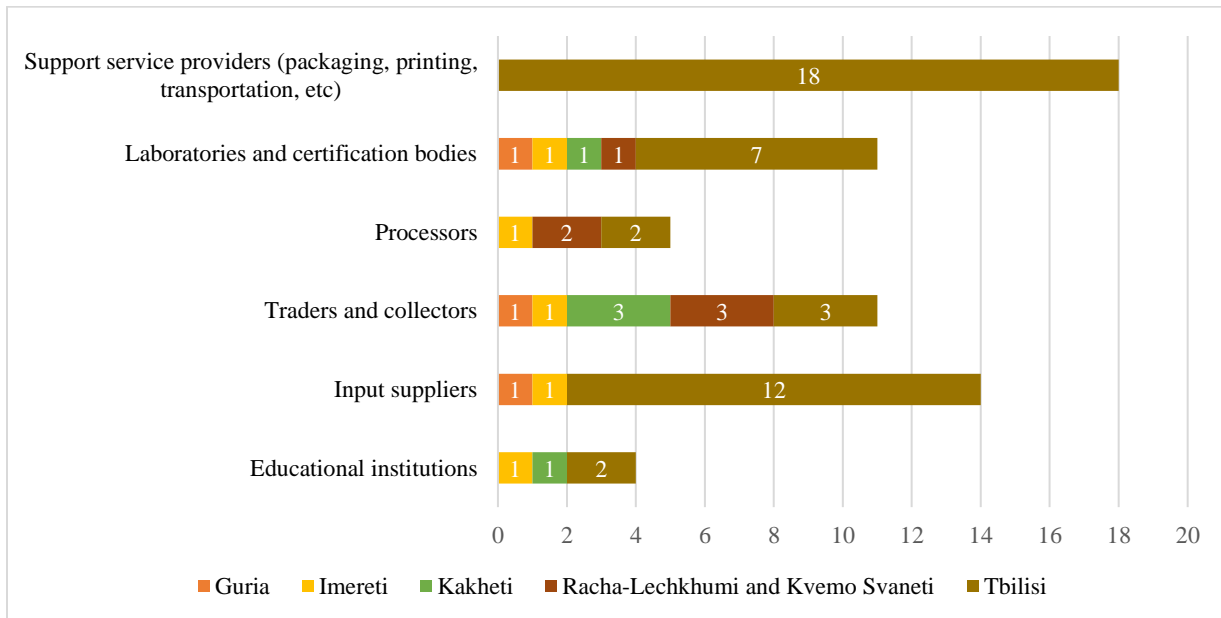


21% of identified farmers sell or plan to sell their products abroad.

## Other identified stakeholders

4 educational institutions, 8 suppliers of raw materials, 3 suppliers of biological agents, 5 veterinary pharmacies and importers of veterinary drugs (note: according to figure 6, sum of identified input suppliers is 14 instead of 16 since two companies are specialized in production of both, raw materials and biological agents), 11 traders and collectors, 5 processors, 7 laboratories, 4 organizations issuing documents required for honey export, 6 packaging companies, 4 printers, and 8 land or air transport companies were identified.

Figure 6. Regional distribution of other stakeholders



The majority of post-harvest service providers are located in Tbilisi.

## Associations

There are a total of 7 beekeeping associations in Georgia:

1. Georgian Beekeepers Union
2. Georgian Professional Beekeepers Association
3. Jara Beekeepers Association
4. Western Georgia Beekeeping Alliance
5. Beekeepers Association of Georgian Mountainous Regions (Ambrolauri District)

## Supermarket chains

Table 2 lists the supermarket chains operating in Georgia and the number of their stores throughout the country.

Table 3. Supermarket chains and number of stores throughout Georgia

<b>Supermarket</b>	<b>Branches around Georgia</b>
Carrefour	8
Fresco	8
Foodmart	51
Goodwill & Marche	8
Universam	2
Nikora holding	242
Ori Nabiji	95
Smart	12
Vejini	5
Zgapari & Baia	19
Magniti	150
Agrohub	2
Europroduct	12

## Financial institutions

In Georgia, 15 commercial banks, 59 microfinance organizations (MFOs), two credit unions, and four leasing providers were identified. The database contains contact information for these organizations and the date they were licensed.