



The Uganda National Apiculture Development Organization (TUNADO)

End of 2015 National Apiculture Multi-stakeholders Platform Report

Held on 6th Nov 2015 at National Farmers Federation Hall, Nakasero Road

Supported by



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1.0 Background

The National Apiculture Multi-stakeholder Platform (MSP) remains a single most opportunity through which all stakeholders and none TUNADO members can influence sector priority issues and TUNADO's agenda to foster apiculture development agenda in Uganda. The MSP started way back in 2007 (thanks to SNV and Bees for Development for providing initial support) at a time when it was very hard to bring stakeholders to a round table to discuss issues of interest. TUNADO has continued to harness the MSP's wide range of knowledge to provide sector coordination and strategic direction. The MSP provides a leveled ground to define each stakeholders' roles and responsibilities and make an honest assessment on how each of the stakeholders have deliberated on their mandate without pointing fingers while reflecting on the future of Uganda's apiculture that we all want. At the beginning of the year, the MSP defined and made input on how to implement sector priority issues on how to popularize the national beekeepers training and extension manual, creating marketing platform and apiculture business development services. As a matter of fact, this called for End of year MSP members to give feedback on how these issues were deliberated on. Additionally, during the regional MSPs and national honey week, a lot of factors affecting youth and women inclusion in the apiculture sector were raised but with no solid mechanism on how to increase their position and economic participation in the honey value chain. Additionally for the last two decades, the sector has made significant strides in developing the domestic hive products market and at this point there appears to be indicators that production is steadily increasing and the local market is almost getting saturated and calls for prior planning to handle surplus and explore opportunities for distant markets. It is against this background that TUNADO solicited financial support from Oxfam and Swiss contact Uganda to conduct the end of year 2015 MSP.

1.1 Purpose of End of Year National Apiculture MSP

The purpose of End of Year National Apiculture MSP was to self-evaluate on how stakeholders together deliberated on the sector priority issues set for 2015, document replicable achievements and define new mechanisms for a more inclusive apiculture sector to match the recent market demands.

2.0 Proceedings of End of Year National Apiculture MSP

2.1 Session one: Welcome Remarks and Key note address

Welcome remarks from Chairman

The MSP took place on the 6th Nov 2015 at Uganda National Farmers Federation Hall Nakasero. The meeting started by welcome remarks from Mr. Jurua McPeace Jackson, Chairman Board of Directors National Apiculture Development Organization (TUNADO). Mr Jurua thanked the members present for honoring the invitation. He said their presence was testimony of their love for the honey value chain. He accorded special welcome to Mr Ntungwa Januario from Trias, Ms Asiimwe Carol from Swiss Contact, Ms Diana Namayanja from National Livestock Resources Research Institute and Mr Kisenyi Robert from Apitrade Africa. He recognized the presence of those attending for the first time.

He reminded the members that the MSP remains the simple most important opportunity through which all stakeholders can influence sector priorities and add to the agenda of TUNADO the apex body coordinating the apiculture industry. He said that the MSP provides level ground where each stakeholder's role is determined and performance assessed with desired future of Uganda's apiculture industry. The Chairman said, in the past decade, the industry has made great strides in developing the domestic market for honey and other hive products and it was increasingly becoming apparent that the domestic market will soon get saturated hence the need to focus on developing distant markets. On this note he welcomed back the Executive Director Mr. Biryomumaisho Dickson who had been in United Kingdom on Commonwealth professional fellowship hosted by Bees *for* Development exploring international markets for beeswax honey and other hive products. He remarked that the beginning of the year MSP identified sector priorities such as popularizing the National Beekeeping Training and Extension Manual, creation of marketing platforms, and provision of business development services. He said a lot had transpired and the MSP was imminent to assess the extent to which priorities have been achieved and set new areas of focus for 2016. He later encouraged everybody to freely contribute to the deliberations. He concluded by thanking Oxfam, Trias and Swiss Contact for supporting the 2015 MSPs both at regional and national levels.

Keynote Address:

The Executive Director TUNADO Mr Biryomumaisho Dickson gave the Key note address. Mr Biryomumaisho started by asking participants to define TUNADO. Participants defined TUNADO as the national body responsible for coordinating all honey value chain actors. He then told participants that for TUNADO to deliberate on her coordination mandate, it calls for all stakeholders to participate on a levelled ground and hence the reason for continued MSP both at regional and national level.

He said the MSP continue to bring together sector players to deliberate on issues of interest. He cited the major objective of this year's MSP as to; Self-evaluate, Set priority issues and develop delivery mechanisms. He explained that at the end of the MSP will deliver

1. Feedback on the MSP implemented activities areas of improvement
2. Inclusivity plan for women and youth in honey value chain
3. Input business wing roadmap
4. Insights on how to harness regional and international market provided
5. Other areas of consideration for 2016

2.2 Session two: Reflection and feedback making on 2015 MSP set issues

Highlight on implemented activities: Programme Manager – TUNADO MS Phionah Birungi

The PM gave a reflection on the 2015 Sector Priority Areas as;

1. Continue with training ToTs & popularizing the national beekeepers training and extension manual
2. Apiculture business development services (apiculture shopping centre & soft loans)
3. Marketing platform (national honey week, trade promotions, exhibitions and shows)

4. TUNADO was advised to open regional offices as a way of increasing service delivery
5. Maintaining quality of hive products by finalizing and operationalizing the Standard Operating Procedures (SOPs)
6. MAAIF to periodically update TUNADO on the progress of the National Apiculture Policy

She then highlighted activities that were implemented under coordination of TUNADO with support from stakeholders. The following were implemented activities in response to sector priority issues;

Training of Trainees

- Conducted in house training for ToTs in Kabanyolo for 1 week where pedagogical skills on CBET were handled. The facilitation was done by Skills initiative Uganda Ltd who developed the national beekeepers training & extension manual. A total of 26 ToTs participated and are in the field training others. However, follow up will be done by TUNADO & MAAIF to assess their performance in their respective job titles and if successful, will be certified by MAAIF and TUNADO as national trainers

Regarding Business development - Apiculture shopping centre and soft loans

- TUNADO solicited services of Effective skills development consult to develop the business plan for the apiculture shopping centre.
- With support from Oxfam, a MoU has been signed with Centenary Bank to give loans at an interest rate of 23% per annum to value chain actors in apiculture in the districts of Lira, Kotido, Arua, Maracha, Nebbi & Koboko. Financial literacy has been done in Lira & Kotido and account opening is ongoing. Training in West Nile is on-going and will be concluded in November 2015.
- With support from Trias, another MoU is yet to be signed with HOFOKAM to give out loans at an interest rate of 19% per annum to value chain actors in Bunyoro & West Nile regions and to processors buying hive products from those two areas.
- Additionally, another MOU is yet to be signed with Nyaravur SACCO in Nebbi to provide low interest loans to beekeepers in the districts of Arua, Nebbi and Zombo.

Honey Week

- 6th national honey week was organised on 24th-29th August 2015 at Forest Mall, Lugogo under the theme ***“Transforming women & youth from subsistence to commercial apiculture”*** and all the activities for the week-long event were tailored to address the theme notably the youth forum and the women’s forum whose recommendations are being followed up to achieve the theme.

Regional Offices

- Arua regional office is now fully functional with 2 full time staff serving 267 beekeeper groups in the districts of Arua, Nebbi, Zombo, Maracha, Koboko, Yumbe and Moyo.

Standard operating procedures

- These were reviewed and submitted to MAAIF. MAAIF had all entomologists convened to review the same and outcomes of that meeting to be communicated by MAAIF staff present

Progress of the National Apiculture policy

- Progress to be given by MAAIF staff present

Issues raised:

The house found a need to step up information sharing to all categories of stakeholders prior to the events and early in advance.

It was proposed that the best apiary enterprise winners be promoted and if possible use BUKEDDE TV to visit the winners and air out factors behind their success for others to learn from them.

More keen attention was called for in selecting the venue now that the exhibitors had increased and competition is also ticking in. It was agreed that Forest Mall be maintained or new places like Nakivubo, Uganda railways, city square, be considered.

There was a proposal that during the honey week members can be innovative and reduce the prices of the products, to increase their sales.

Stakeholders were advised to make use of the available marketing platforms including Api-newsletter, website, twitter, face book, AgriProFocus marketing platform, PSFU Platform among others.

Stakeholders observed that most of them missed Tots because of short notice to raise UGX 350,000 and requested that next time, information be given to them in advance.

While there was general applause and appreciation of advances in the Arua regional office, more regional offices were pushed for as a way of increasing service delivery

The house seemed happy with advancements in maintaining quality of bee products by finalizing and operationalizing the standard operating procedures (SOPs), but the existence of substandard products still being cited in the market did not go well with the members. There were even proposal of TUNADO taking on a more standard enforcement stance and cause the destruction of some culprit products.

The continued delay in passing out the National Apiculture Policy promulgation despite reported process was an issue in the house. It was recommended that TUNADO follows it up.

Women and Youth Raised Issues - Carol Asiimwe - Project Manager SCU

Beekeeping a Viable Business for Youth and Women?

- Women and youth are key drivers of the social-economic transformation in the beekeeping industry in Uganda.
- Uganda's population are women of which 26% are aged between 15 years and above (**2014 census estimates**).
- 72% of all employed women and 90% of the rural women work in agriculture compared to 53% of the rural men

Feasibility of Beekeeping

- Beekeeping is a less risky business.
- A sustainable enterprise.
- Feasible for both rural and urban women and youth.
- Resource efficient as it requires relatively low initial investment costs.
- Less labor intensive.

Opportunities for youth and women in Beekeeping

Production

An average a beekeeper requires at least 20 beehives, each costing between UGX 150, 000 and 200, 000/=.

Business

Each hive produces a minimum of 10kgs of processed honey per year and each kilogram fetches a minimum of ugsh10, 000 at farm gate. This means that a beekeeper earns UGX 2 million from honey, with very little labour input.

Processing. - Bees wax and Propolis

- Is it possible for the youth to start investing in beekeeping?
- The available and existing information and support services?
- Are the youth aware of niche markets for different bee-hive products in Uganda?
- What are the main obstacles hindering the youth to invest in beekeeping?

Information:

- Strict UNBS conditions of acquiring a certified mark.
- Few women extension service providers
- Knowledge and skills needed to address priority needs of women and youth are not considered by different players in the sector.

Youth and Women engagement in beekeeping

- Some are discouraged by transport options available to participate in business related activities
- In most cases, women need Consent from their husbands to participate in out of home activities.
- Today, women are becoming a focus in the **inclusive businesses** related to beekeeping sector

2.3 Session three: Apiculture business development services Chaired- Januarío Ntungwa- Trias

TUNADO business wing: Effective Skills

On realization that donors are increasingly becoming fatigued funding NGOs, TUNADO thought of diversifying its income from various income streams. Most of its funding is from donors/development partners. TUNADO members have always cherished to internally generate income, additionally producer associations, cooperatives and packers have since 2012 pointed out limited market access and high marketing costs as major challenges affecting their operations and profit. The shrinking support from development partners is likely to render TUNADO a financially unstable member based organization (MBO) without the capacity to serve its members.

TUNADO proposed to start a business component to:

1. Pave the way for increased access to affordable and genuine apiculture inputs by its members
2. Support initiatives for its members to participate in remunerative markets
3. Support its members to undertake apiculture as a business and a source of income to both members and TUNADO at large.
4. As a source on internally generated incomes to contribute to economic sustainability of TUNADO.
5. One stop centre where consumers can access quality honey products

It will serve as a marketing agency /platform for members' apiary equipment and hive products and at the same time provide consultancy services thus contributing to TUNADO's running costs in reaching its members. TUNADO Limited will charge commission for the marketing honey and hive products and fees for services provided. TUNADO Limited will have lean staff and most of them will be paid on commission basis - based on sales revenue generated.

The business plan follows modern 'lean' approaches to developing the core *business model* on which the overall *business plan* is based. The Business model encompasses the nine essential segments of any business - Business Model Canvas (BMC). BMC accepts that, since the future is unknown, business models are inevitably based on hypotheses, rather than facts, and copes with that by adopting the scientific method for prototyping and shaping business concepts: articulating hypotheses that explain the perceived business opportunity and then prioritising them testing the hypotheses through build-measure-learn loops capturing the lessons learnt and then: if still uncertain testing some more, if validated proceeding to build the business, if invalidated iterating, pivoting and reviewing the hypotheses. Articulating the hypotheses facilitates detecting things that do not go to plan and removes the fear of failure. That is an absolutely essential element of any new business such as TUNADO limited

TUNADO will have to combine two traditionally separate models: a charitable and a revenue generation model (business model) that guides its commercial activities. The business wing will be registered as a company limited by shares (pure business)

However, for it to succeed there will be need to separate the management for the two organisations. The Vision is to be one stop centre for guaranteed quality honey, hive products, beekeeping equipment and beekeeping consultancy services in Uganda.

With a mission to provide remunerative (profitable) markets for honey and other hive products produced by TUNADO members through the establishment of a marketing agency, and to diversify TUNADO revenue sources for sustainability purposes. TUNADO has members across the country and the business wing will be the only marketing agency in Uganda with a variety of honey and other bee products directly sourced from farmers across the country). Documented evidence for the source of honey for traceability purposes. Selling genuine honey and other hive products (bought directly from farmers)

Unique selling points for TUNADO Business Wing (USP)

- TUNADO has members across the country and the business wing will be the only marketing agency in Uganda with a variety of honey and other hive products directly sourced from farmers across the country)
- Documented evidence for the source of honey for traceability purposes.
- Selling genuine honey and other hive products (bought directly from farmers)
- Profit earned will be ploughed back to beekeepers through TUNADO
- Providing practical information and consultancy services informed by practical experience both directly and indirectly through members
- The business wing does not belong to an individual but TUNADO members
- The business wing will not compete with anyone but rather benefits all by providing additional market for honey
- It will be used to generate important information, data and trade issues that can inform national engagement meetings with government e.g Ministry of trade, agriculture, finance
- Quest for guaranteed quality will make us different and be of great value to consumers

Value proposition

Creating new and remunerative (profitable) markets for honey and other hive products for members, through the establishment of a marketing agency that distributes and supplies different apiculture products and equipment directly sourced from members

Role of TUNADO as a marketing agency

- Concentrate on marketing on behalf of beekeepers.
- Eliminate the role of middleman and serve the interests of beekeepers.
- Carrying out cost and pricing analysis
- Obtaining market research information
- Assessing customer buying behaviour and influence
- Building brand identity and credibility
- Develop good segmentation, targeting and positioning strategies
- Developing feedback mechanisms for measuring customer needs and satisfaction

- Defining the best market segments to target
- Managing and organizing customer events to build and strengthen relationships
- Enhancing visibility in the market place
- Negotiating price and contract parameters
- The feedback mechanism should be maintained between the market and marketing agency.
This is will be achieved through trade shows, exhibitions, and civil society days.

The feedback mechanism should be maintained between the agency and beekeepers. This is will be achieved through regular Multi-stakeholder platforms (MSPs) research, workshops and/or seminars. These can be combined

TUNADO Business Wing; Products and Services

1. Honey and hive products
2. Beekeeping equipment
3. Beekeeping consultancy services
4. Bridging product and equipment supply linkages
5. Information provision
6. Apiculture promotion
7. Beekeeping incubation to processors and packers

Targeted Customers

1. Government (can pay for technical information and consultancy services)
2. Development partners, (can pay for technical information and consultancy Services)
3. Supermarkets, traders,
4. Consumers,
5. Beekeepers,
6. Processors packers,
7. Equipment manufacturers etc

Revenue models

Commission on sales through the agency that is over and above the costs incurred by the agency
Consultancy fees

Issue raised

Who will be eligible to have shares? only mother TUNADO members or even nonmembers who may have the capacity to buy shares?

Should TUNADO set a minimum and maximum number of shares for individuals and or groups?

For consultancy services, will it charge its members the same amount compared to non-members?

Will stakeholders be given the full document and allowed time to input?

Response:

- It was agreed that on the business wing document will be shared with stakeholders and their input solicited
- Explanation was given that under the new companies act, a registered company limited by guarantee is a legal entity and hence has rights to register a company limited by shares.
- It was agreed that TUNADO will be the one to open and register TUNADO Ltd

Insights on regional and international market access:

Robert G Kisenyi Publicity Promotion Officer - Apitrade Africa

ApiTrade Africa (AA) is a private sector-led not-for-profit, member-based organization which works in 16 African countries currently. It is uniting body for beekeepers and honey traders in Africa. It was formed and legally registered in Uganda in 2008 to promote the image (brand) of African Honey globally and strengthen trade and investments in the sector. A key secondary role of AA is to coordinate efforts which promote commercial beekeeping in the continent.

On the global scale, 70-85% honey is used for consumption as table honey – high quality, organic, fair trade, 15-30% for industrial use – low priced, non-organic for bakery, confectionary and honey wine industries. The major criteria to buy honey include: Good look or colour – EU prefers white and light amber colour, Good taste - Clear liquid honey with a mild fruity taste, increased interest for mono-flora honey e.g. Manuka honey. African honey is mainly darker in colour and stronger (spicy) in test. It is mainly forest honey. European buyers blend to get the right color and taste. Africa's supply to EU small: 0.25% of total EU supply. Exports are rising: Eight (8) countries on EU third-country listing: Uganda (2005), TZ, Ethiopia, Zambia, Cameroon, Ghana, Madagascar and Rwanda Nigeria is in the process of enlisting – AA is providing technical guidance and expertise. Though small, there is trade in honey and beeswax within the continent. Ethiopia to Sudan, Tanzania to South Africa and Kenya, South Sudan to Kenya, Dem Republic of Congo to Uganda, Zambia to Zimbabwe and more.

The case of Uganda

- Domestic market well developed
- Number of small holder beekeepers: 1,200,000
- Investments driven by private sector: processors and beekeeping equipment suppliers
- NGOs's strong support: capacity building, training, production inputs, market development, policy and advocacy

There is ApiExpo Africa 2016 – Kigali – Rwanda from 21st -26th Sept 2016 with the theme Driving Social Economic Transformation: The role of commercial beekeeping.

ApiTrade Africa is becoming a member of COMESA Business Council. It is believed their presence in this block will position the Africa Honey Industry better in terms of influencing projects, budgetary and policy decisions in favour of the private sector, where the SMES are the core business drivers.

2.4 Session four: Ranking of areas of consideration for 2016 year ED-TUNADO

It was agreed that 2016 the sector should focus more on:-

1. Market development such honey week, market place events, api-expo and TUNADO marketing platform.
2. Beekeeping enabling environment through organizing business event, trade missions, lobbying for fovaorable policies such as taxation, linkages to financial institutions
3. Women inclusion through addressing gender based barriers to beekeeping (e.g harvesting at night, hanging hives higher in trees), involving, training in beekeeping and Gender Action Learning Systems - GALS and sensitizing women on income and livelihood potential
4. Youth inclusion through youth forum, labour based services, marketing and trainings.
5. TUNADO Institutional development through continued recruitment, maintenance of members and opening of regional offices.
6. Extension services through promotion of beekeeper to beekeeper extension model

Pictorial Impression of the End of Year MSP for 2015



Participants of 2015 Pose for End of Year MSP



Group discussion on sector priority issues for 2016



Participants of 2015 End of Year MSP listening attentively to presentation



Participants of 2015 End of Year MSP present sector priority issues for 2016

Programme of the National End of Year MSP.

Time	Activity	Responsible
2:00-8:00PM	5 th November 2015. Arrival of up-country participants	Allon and Sarah
	6th November 2015	
08:30-09:00	Registration	TUNADO
09:00-09:30	Welcome remarks	Chairman –TUNADO
09:30-10:00	Key note address	ED-TUNADO
Reflection and feedback making on 2015 MSP set issues		
10:00-10:30	<ul style="list-style-type: none"> Icebreaking on areas tackled 	Programme manager- TUNADO
10:30-11:00	Stratum group reflection and presentation	Commissioner- MAAIF
10:30-11:00	Coffee/Tea Break	
Marketing platform		
11:00- 11:30	<ul style="list-style-type: none"> Women and youth raised issues 	Carol – Project Manager-SCU
11:30-12:00	<ul style="list-style-type: none"> Group discussion 	All Participants
12:00-12:30	<ul style="list-style-type: none"> Presentations and setting a strategy for inclusion 	Harriet-Oxfam
12.30- 01.45	Lunch	
Apiculture business development services		
01:45 -02:20	<ul style="list-style-type: none"> TUNADO business wing 	Ambrose-Effective Skills
02:20-02:40	<ul style="list-style-type: none"> Input solicitation 	Januario-Trias
02:40-03:30	<ul style="list-style-type: none"> Insights on regional and international market access 	Bosco-Apitrade Africa
03:30-04:40	<ul style="list-style-type: none"> Ranking of other areas of consideration for next year 	ED-TUNADO
04:40-5:00	<ul style="list-style-type: none"> Highlight of major issues generated 	Rapporteur