

BEEKEEPING SECTOR IN KOSOVO



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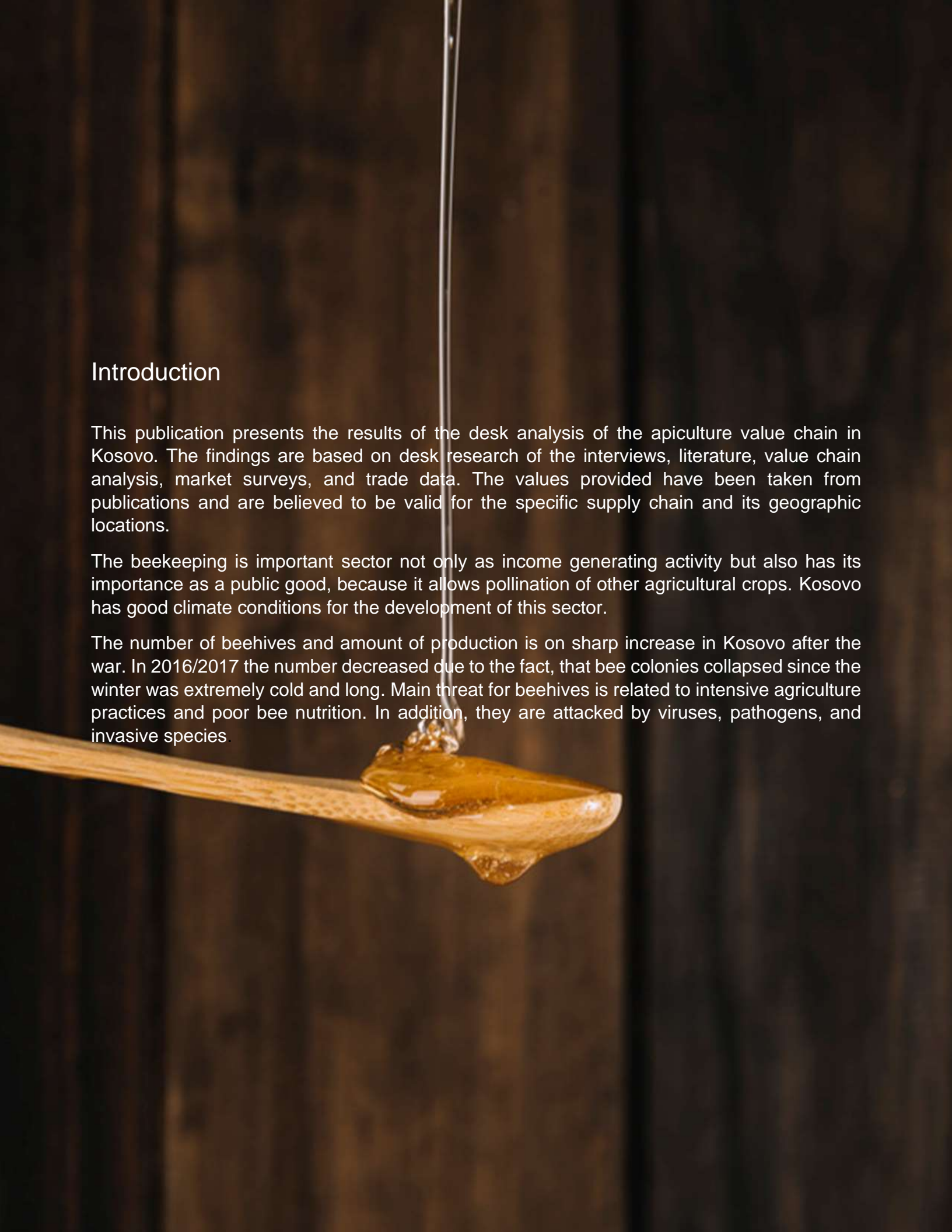






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A wooden spoon is shown horizontally, with a thick stream of golden honey dripping from its bowl. The background is dark and textured, possibly wood grain. The lighting highlights the viscosity of the honey as it falls.

Introduction

This publication presents the results of the desk analysis of the apiculture value chain in Kosovo. The findings are based on desk research of the interviews, literature, value chain analysis, market surveys, and trade data. The values provided have been taken from publications and are believed to be valid for the specific supply chain and its geographic locations.

The beekeeping is important sector not only as income generating activity but also has its importance as a public good, because it allows pollination of other agricultural crops. Kosovo has good climate conditions for the development of this sector.

The number of beehives and amount of production is on sharp increase in Kosovo after the war. In 2016/2017 the number decreased due to the fact, that bee colonies collapsed since the winter was extremely cold and long. Main threat for beehives is related to intensive agriculture practices and poor bee nutrition. In addition, they are attacked by viruses, pathogens, and invasive species.

Beekeeping Supply Chain (Value Chain)

This section addresses the question of how the apiculture supply chain is configured in terms of products, their uses, actors, activities, and values. Apiculture in Kosovo produces the following product: honey, pollen, royal jelly, beeswax, bee venom, propolis and other related products.

The honey value chain is very simple and short with only few actors involved.





Beekeeping Supply Chain in Kosovo

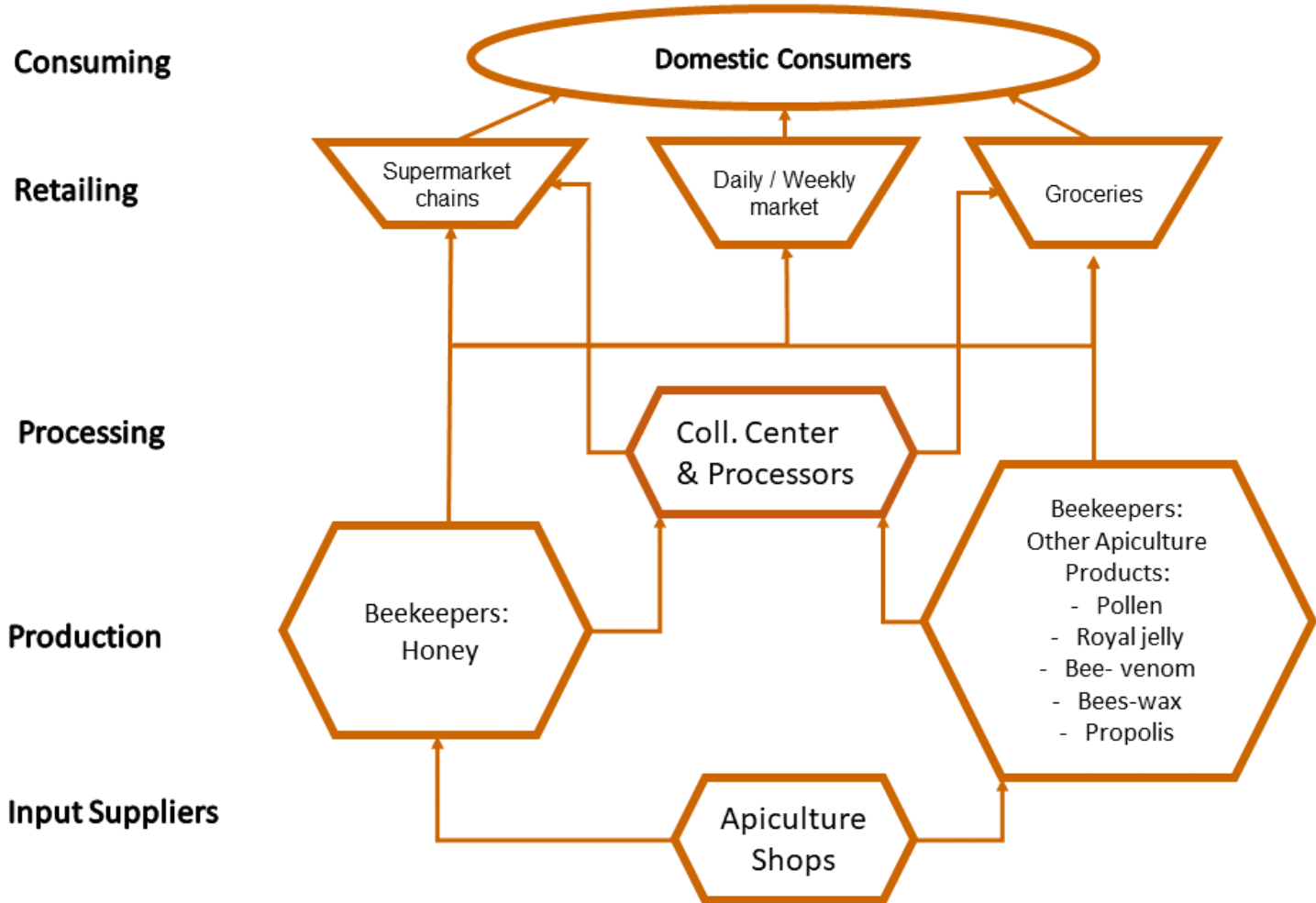


Figure 1. Beekeeping Supply Chain

The total market in Kosovo for honey is around 2,400 tons. There are three main retailing channels: supermarkets, daily / weekly markets, and the groceries. Important trade channel to costumers in Kosovo is a farm-gate sells directly from farmer's house. Farmers produce different types (colors based on locality and type of flowers) of honey and the bee products mainly packaged into glass or plastic jars. In 2019, Kosovo had totally 219,831 beehives. Domestic honey starts supplying the market by the end of May or the beginning of June and usually runs until November. Honey and other bee products are prepared by the farmers (separated, filtered, and packaged) and are further sold. Important trade channel to costumers in Kosovo is a farm-gate sells directly from farmer's house. Certain quantity goes to local markets in villages, district, or regional cities, where the honey is sold in glass jars or sometimes in plastic jars. Only minor quantity is additionally processed as a mixture of honey and other ingredients, packaged, and further sold individually or via three main retailing channels. Beekeepers are supported by more than 20 apicultural shops spread in entire territory with the various working tools, equipment, and other supporting materials.

Input Suppliers

Input suppliers constitute the initial node of the value chain and they are operating as individual entrepreneurs involved in the construction of beekeeping gear for sale to interested producers and supply with all required material, farm equipment and other tools. They mostly focus on selling modern farm equipment and other accessories for beekeepers.

The beehives are either constructed locally or imported from various countries and are usually ready to use, the rest of material are mainly imported.

The price of beehive is starting around 45 euros while the rest of the equipment are with the various prices depending mainly on the quality i.e., centrifuges, protection clothes etc.



Honey Production

According to official statistics, the number of beehives in Kosovo increased gradually, starting with more than 157 thousand in 2015. In 2019 the hives number was 219,831. From the total number of beehives, 93% were subsidized by the Ministry of Agriculture.

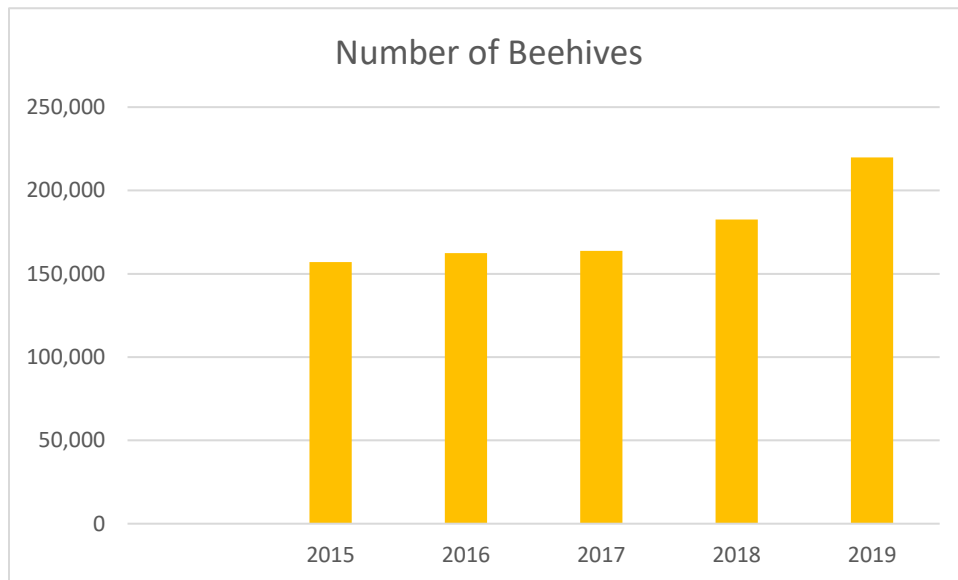


Table 1 - Number of Beehives, 2015 -2019

The total honey produced in Kosovo in 2019 was around 2198 tons. Based on official data, the self-sufficiency for the honey is around 91%, with estimated per capita consumption of around 1.4 kg. Kosovo imported 229 tons of honey in 2019, while exported only 75 kg to Albania.

From the total of the imported honey 40% were imported from North Macedonia, 17% from Turkey, 9% from Croatia, 5% from Slovenia, 4% from Germany, 4% from Albania and 4% from other countries.

The main regions identified for the honey production are Pristina (21.4%), followed by Prizren (17.4%), Peja (14.1%) and Mitrovica (14%). Average production for beehive in Kosovo in 2019 was 10 kg.



Honey Collection Centers and Processors

In Kosovo, the honey in general is sold as a pure product direct on farm gate. There are only four companies registered for collecting and packing the honey and the other bee products.

The main actors within the honey and other bee products in Kosovo are: "Apikos", "Down Syndrome Kosova", "Epi" and "Cito & Terra – Gruppe".

Wholesale and Retail

Most of the bee products are sold by the farmers but there is certain amount of honey collected and further processed by four companies in Kosovo. The pure honey and the processed honey is further sold mainly directly to the various shops i.e. 'Bio" shops, supermarkets, other shops and the green market.



Domestic Consumption

The estimation is that In Kosovo in 2019 is consumed around 2,427 tons of honey. For the year 2019 the local production is estimated to be around 2,198 tons. The rest of the honey (229 tons) was imported from Macedonia, Slovenia, Albania, Croatia, Germany, Turkey, and other countries.





Productivity

The average honey production for the period from 2011 to 2015 is estimated to be 1,236 tons. Kosovo beekeepers are producing in average between 12 and 15 kg honey annually per hive, although some farmers claim they can get up to 45kg/hive per year, when the weather is optimal. Honey production variations are related to different factors such as climate, nectar quantities, density of bee colonies, and variable size and forms of the hives used in each region.



Production prices

Based on data from 2016,2017,2018 and 2019, the retailing price of honey is around 7.2 €/kg while the selling price to the end user is around 9.2 €/kg.

The price of honey in Kosovo is one of the highest (9.2€) comparing to the countries in the region. In 2015, only in Austria the honey price is 8.80, while in the other countries is much lower, i.e., Greece is 5.97, Rumania 3.51€, Bulgaria 2.97 €, or Hungary 2.47 €

Other bee products

There are several farmers in Kosovo who diversified production to the other beekeeping related products as well. The main other bee products produced, in marginal quantities, are pollen, royal jelly, beeswax, bee venom, propolis and other related products. Some farmers produce also non-honey beekeeping products since the beekeeping has a long tradition.