Enabel

Executive summary

Final Evaluation of the Beekeeping Value Chain Support (BEVAC)

TAN180351T

Tanzania

Consortium Particip and Technopolis

May 2026

Agence belge de développement

enabel.be

1. Presentation of the evaluation

The Final Evaluation of the Beekeeping Value Chain Support (BEVAC) programme was commissioned to assess the performance, results, and sustainability prospects of the intervention implemented in Tanzania between 2021 and 2026. The programme was funded by the European Union and implemented by Enabel, in partnership with the International Trade Centre, with a total budget of 9.9 M€.

The overall objective of BEVAC was to contribute to inclusive economic growth and poverty reduction through strengthening the competitiveness of an inclusive and environmentally sustainable beekeeping value chain. The intervention operated in seven regions of Tanzania (Tabora, Kigoma, Katavi, Singida, Shinyanga, North Pemba and South Pemba) and targeted all levels of the value chain, from production and extension services to processing, certification, market access and sector governance.

The evaluation had a dual purpose of accountability and learning. It aimed to:

- assess the programme's performance against the Organisation for Economic Co-operation and Development – Development Assistance Committee evaluation criteria;
- analyse the programme's contribution to sector transformation;
- identify lessons learned and formulate recommendations for future interventions in the beekeeping sector and broader value chain development programmes.

The evaluation covered all components of the programme, including:

- institutional and policy support;
- production and productivity enhancement;
- market access and trade promotion;
- environmental sustainability and conservation;
- inclusion of women and youth;
- digitalisation and monitoring systems.

The primary users of the evaluation are the European Union Delegation, Enabel, the Government of Tanzania – notably the Ministry of Natural Resources and Tourism and the Ministry of Industry and Trade – as well as development partners, private sector actors, research institutions and sector organisations.

The evaluation adopted a mixed-methods and theory-based approach combining qualitative and quantitative analysis. The methodology relied on:

- extensive documentary review;
- semi-structured interviews with institutional stakeholders, implementing partners, private sector actors and financial institutions;
- focus group discussions with beekeepers, cooperatives, women and youth groups;
- field observations in selected intervention areas;
- remote interviews for areas not physically visited, notably Pemba Island.

The evaluation used a contribution analysis approach and systematic triangulation of evidence to assess the programme's contribution to observed changes in the sector. Particular emphasis was placed on effectiveness, impact and sustainability.

2. Findings and conclusions

2.1. Summary assessment

The evaluation concludes that BEVAC made a substantial contribution to the transformation of Tanzania's beekeeping value chain. The programme successfully combined policy support, institutional strengthening, technical modernisation, environmental conservation, and market integration within a coherent value chain approach. Despite important implementation delays during the inception phase, adaptive management measures introduced after the Mid-Term Review enabled a strong recovery and high overall performance. The programme laid a strong foundation for a more commercial, inclusive and environmentally sustainable beekeeping sector in Tanzania.

Coherence	A	The programme demonstrated very strong internal and external coherence through its holistic value chain approach and strong complementarities with government systems, donor programmes, and private sector actors.
Relevance	B	Strong alignment with national priorities and sector needs, addressing major value chain constraints related to productivity, market access, environmental sustainability, and inclusion, though some technologies, targeting approaches, and market orientations were not fully adapted to all beneficiary contexts.
Efficiency	B	Efficiency improved significantly after the Mid-Term Review through adaptive management, stronger coordination and decentralised implementation, despite early delays and persistent structural constraints.
Effectiveness	A	The programme achieved most planned outputs and outcomes, significantly strengthening production systems, institutional capacities, market access, and environmental conservation.
Sustainability	B	Sustainability prospects are generally positive due to strong institutional anchoring, private sector engagement and environmental integration, although important financial and governance risks remain.
Impact	A	BEVAC generated substantial economic, environmental, institutional and social impacts, contributing to the transition towards a more commercial, resilient and sustainable beekeeping sector.

2.2. Summary of findings by evaluation question

BEVAC generated significant economic, environmental and institutional impacts and contributed to structural transformation of the beekeeping sector. The programme improved livelihoods, stimulated private investment, strengthened conservation incentives and enhanced Tanzania's positioning in regional and international honey markets. Although many higher-level effects are still consolidating, the intervention clearly played a catalytic role in promoting a more commercial, inclusive and sustainable value chain.

2.2.1. EQ1 – Relevance to Tanzanian policies and sector priorities

BEVAC remained strongly aligned with the policies and priorities of the Government of Tanzania, particularly those of the Ministry of Natural Resources and Tourism and the Ministry of Industry and Trade. The programme directly supported national objectives related to rural income generation, industrialisation, environmental conservation, export promotion and climate resilience. Its relevance was reinforced by continued government commitment to the beekeeping sector,

including initiatives such as “Drop the Axe, Take the Beehive” and emerging international trade opportunities for Tanzanian bee products.

2.2.2. EQ2 – Relevance to the needs of target households

The intervention responded effectively to the needs of beekeepers and rural households in terms of resilience, economic empowerment and environmental sustainability. Improved beekeeping practices, diversified income opportunities and stronger market access contributed to increased household resilience and incomes. The programme also promoted greater participation of women and youth through adapted technologies and entrepreneurship support. However, affordability of improved technologies and uneven access to services continue to limit full inclusiveness.

2.2.3. EQ3 – Coherence and complementarities

BEVAC generated strong synergies with government institutions, donor-funded programmes, conservation initiatives and private sector actors. Its integrated value chain approach created complementarities between production, processing, certification and market access. The programme effectively built upon previous Enabel interventions and coordinated well with other European Union and development partner initiatives. Some tensions nevertheless persisted between conservation policies and access to protected areas, as well as between market-led and subsidy-based approaches.

2.2.4. EQ4 – Quality and robustness of outputs

The programme delivered high-quality outputs that provide a strong foundation for long-term value chain development. These included improved regulatory frameworks, strengthened institutions, upgraded infrastructure, demonstration apiaries, training systems, and market support mechanisms. The intervention also established a localised supply chain for beekeeping equipment, enhancing accessibility and sustainability. Some infrastructures, however, were not yet fully operational at the time of the evaluation.

2.2.5. EQ5 & EQ10 – Benefits to beekeepers and productivity gains

Beekeepers benefited significantly from the programme through improved technical capacities, coaching, extension services and access to equipment. Adoption of Good Beekeeping Practices increased substantially, contributing to improved colony management, higher productivity and better product quality. Increased extension coverage and peer-to-peer learning approaches strengthened outreach and ownership. Nevertheless, the high cost of modern hives and continued dependence on programme-supported services remain important constraints.

2.2.6. EQ6 & EQ11 – Market access, commercialisation & private sector development

BEVAC contributed significantly to strengthening market access and commercialisation of bee products. The programme supported certification processes, branding initiatives, participation in trade fairs, and linkages between producers and private firms. Dozens of Micro, Small and Medium Enterprises accessed new domestic and international markets. Private sector partnerships added major value by driving a market-led approach. Firms ensured offtake, created demand, and improved quality, enabling 49 MSMEs to access new markets and secure major export deals. Investments (over 2 M€), policy reforms, quality standards, and local supply chains strengthened results and sustainability. However, benefits remain uneven, with smaller actors less integrated. While export readiness improved substantially, the consolidation of sustained trade flows will require continued support and investment.

2.2.7. EQ7 – Approaches and tools

BEVAC's approaches effectively addressed key bottlenecks through a holistic value chain strategy linking production to markets. Decentralised extension (B2B, FFS), local artisan supply, and market tools (trade fairs, Honey Trademark) improved adoption, access, and prices. Policy dialogue enabled reforms. These integrated, market-led tools were key to achieving outcomes, though sustainability challenges remain.

2.2.8. EQ8 – Institutional strengthening and governance

The programme strengthened institutional capacities across the sector, including government services, research institutions, cooperatives and business support organisations. Extension systems were reinforced through training and equipment support to District Beekeeping Officers and Lead Beekeepers. The intervention also contributed to policy reforms and improved sector coordination. However, some institutional weaknesses persist, particularly regarding the long-term sustainability and coordination capacity of sector organisations.

2.2.9. EQ9 – Sustainability of results

The evaluation found that sustainability prospects are generally satisfactory due to strong market orientation, institutional anchoring and private sector engagement. The localisation of equipment supply chains and strengthening of technical capacities further enhance sustainability. However, important risks remain regarding financing of extension services, infrastructure maintenance, governance arrangements, climate variability and long-term institutional coordination.

BEVAC's most profitable collaboration combines lead firms (Jambo Asali, Asilia) and TanTrade, driving over 2 M€ investments and global market links. The market-pull model ensures demand, quality, and offtake. Complementary artisan, financial, and BSO partnerships strengthen supply, access to finance, and policy. This integrated model supports sustainable value chain growth, though inclusiveness remains uneven.

2.2.10. EQ12 – Invest stimulation and strengthening sectoral stakeholders

Marketing support spurred 2.05 M€ in investment, boosting demand, jobs, and incomes (+28%). Market pull drove adoption of good beekeeping practices and strengthened organisations. Positive spillovers included youth peer training and rising regional market interest. However, tensions over zonation and risks of adulteration under high demand emerged, affecting sustainability.

2.2.11. EQ13 & 14 – Environmental sustainability and conservation

BEVAC made a strong contribution to environmental sustainability by linking beekeeping development with forest conservation and biodiversity protection. The programme supported the establishment and protection of extensive forage areas and promoted sustainable resource management practices. Preventive measures limit deforestation, fires, and pesticide risks. Climate adaptation and mitigation (carbon, pollination) are integrated into the design. These efforts contributed to reduced deforestation risks and strengthened climate resilience. Long-term sustainability nevertheless depends on continued local governance and effective management of protected areas.

2.2.12. EQ15 – Inclusion of women and youth

The programme contributed positively to the inclusion of women and youth by promoting technologies and business models that reduced traditional barriers to participation in beekeeping. Women and young people increasingly engaged in production, processing and entrepreneurship

activities. However, structural inequalities and financial barriers continue to limit equitable access to technologies, finance and market opportunities.

2.2.13. EQ16 – Digitalisation

BEVAC developed strong digital tools for marketing, traceability, and trade, boosting SME competitiveness, branding, and market access. Systems like THT, portals, and social media improved results. However, relevance is limited for smallholders due to low access, skills, and connectivity, with gender gaps persisting.

3. Recommendations

The BEVAC project's experience has inspired the following 10 recommendations:

Recommendation	Targeted actor(s)	Level	Priority	Type
Recommendation 1: Refine targeting and adapt tools (incl. digital) to local capacities and contexts to enhance relevance and inclusiveness	Enabel, MNRT, Implementing partners	1 & 2	Medium-term	Strategic
Recommendation 2: Consolidate the holistic value chain approach by strengthening coordination mechanisms among public, private and development actors	MNRT, Enabel, Sector organisations	2	Medium-term	Strategic
Recommendation 3: Ensure realistic design and scaling by aligning geographical scope, resources and timelines in future interventions	Enabel HQ, Enabel country office, EU	3	Long-term	Strategic
Recommendation 4: Deepen market integration by strengthening aggregation, quality control and access to finance for smaller actors	Enabel, Financial institutions, beekeeping groups/ cooperatives	1 & 2	Medium-term	Operational
Recommendation 5: Sustain and scale private sector engagement through structured public–private partnerships and investment facilitation	Enabel, MNRT, Private sector	2	Medium-term	Strategic
Recommendation 6: Consolidate impacts through targeted support to ensure full operationalisation of infrastructure and services	Enabel, Local authorities, Cooperatives	1	Short-term	Operational
Recommendation 7: Strengthen institutional sustainability by securing long-term financing and governance of extension services	MNRT, Ministry of Finance, Enabel	2 & 4	Long-term	Strategic
Recommendation 8: Enhance inclusiveness by reducing barriers to technology, finance and information for the most vulnerable groups	Enabel, NGOs, Financial institutions, EU	1 & 2	Medium-term	Operational
Recommendation 9: Strengthen sector governance by supporting a unified and representative beekeeping platform	Sector organisations, Enabel, MNRT	2	Medium-term	Strategic
Recommendation 10: Institutionalise learning and adaptive management through strengthened M&E systems and knowledge-sharing platforms	Enabel, MNRT, Partners	2 & 3	Medium-term	Strategic

Lessons learned

The following 8 lessons have been learnt from BEVAC's experience:

1) **Holistic value chain approaches are essential for sector transformation**: Addressing production alone is insufficient. Sustainable transformation requires simultaneous support to institutions, markets, quality systems, finance, and governance.

2) **Private sector engagement is critical for sustainability**: Strong collaboration with lead firms and market actors creates incentives for quality improvement, investment and long-term commercial viability.

3) **Adaptive management is essential in complex programmes**: The programme's recovery after the Mid-Term Review demonstrates the importance of flexibility, learning and operational adjustment mechanisms.

4) **Localised supply chains enhance sustainability and inclusion**: Training local artisans to produce hives and protective equipment reduced costs, created employment and strengthened local ownership.

5) **Environmental conservation and economic incentives can be mutually reinforcing**: Linking beekeeping to forest conservation generated positive outcomes for both livelihoods and biodiversity protection.

6) **Decentralised extension systems improve outreach but require sustainable financing**: Embedding extension systems within local structures enhances ownership, but long-term financing remains a challenge.

7) **Strong monitoring and evaluation systems are essential**: The strengthening of monitoring systems improved programme management and adaptive decision-making throughout implementation.

8) **Institutional anchoring strengthens ownership and continuity**: Embedding interventions within government systems enhances legitimacy and long-term sustainability, provided coordination mechanisms remain effective.