

MEAT SECTOR DEVELOPMENT IN GEORGIA



Schweizerische Eidgenossenschaft
Confédération suisse
Confederazione Svizzera
Confederaziun svizra

Swiss Cooperation Office
South Caucasus



LIST OF ABBREVIATIONS

ADA	Austrian Development Agency
AJ	Ajara
ALCP	Alliances Caucasus Programme
AMR	Animal Movement Route
BSP	Bio Security Points
EU	European Union
FAO	Food and Agriculture Organization
FS&H	Food Safety and Hygiene
HACCP	Hazard Analysis Critical Control Point
KK	Kvemo Kartli
LHP's	Livestock and Honey Producers
MOU	Memorandum of Understanding
NAITS	National Animal Identification and Traceability System
NAHP	National Animal Health Program
NFA	National Food Agency
SDC	Swiss Agency for Development and Cooperation
SJ	Samtskhe-Javakheti
SME	Small & Medium Enterprise

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EXECUTIVE SUMMARY

In recent years, the meat market has formalized and grown in Georgia¹, with the development and growth in the number of compliant slaughterhouses supplied by Livestock and Honey Producers (LHP's) and the rapidly increasing export of live cattle and chilled halal sheep meat².

The main trends of this growing sector are:

- Tendency for a more varied range of different cuts of meat being sold in formal outlets. (I.e. supermarkets)³
- Increased food safety and hygiene compliance including new legislation on slaughterhouse compliance and labelling.
- An increased number of registered, compliant and Halal slaughterhouses throughout the country (*see Slaughterhouses section, page 8*)
- Increased export of live weight sheep and cattle to Islamic countries as well as to neighboring countries such as Azerbaijan and Armenia (*see Cross Border trade and Export section, page 11*)
- The market for chilled halal sheep meat in the Gulf countries primarily Iran has exploded changing the dynamics of the meat sector. Ensuring sustainability of supply to allow for future growth and fair pricing with maximum benefits to producers is of paramount importance (*see Cross Border trade and Export section, page 11*).
- New demand from Iran and China for sheep by-products⁴.

The main factors boosting export are the following:

- *Free Trade Agreements* recently signed between Georgia and Iran, Georgia and Armenia, Georgia and Saudi Arabia.
- The positive shift in Animal Health Control policy throughout the country, such as cattle vaccination campaign against livestock diseases spread in Georgia, identification and registration of livestock and enforcing livestock health regulation through creating bio-security points (for more details, please *see research Governance Interventions in The Alliances Caucasus Programme, Animal Disease Control section, page 15*).

The sector still suffers from systemic constraints such as *backyard slaughtering* of cattle and sheep, the subsequent supply of uncompliant meat into the value chain, insufficient policing, a lack of reliable data and operational control

¹ A significant contribution to this development was made by the SDC funded Mercy Corps Georgia implemented ALCP programme, which began in Samtskhe Javakheti in 2008 and is now implementing a four year phase (2017 -2021) focusing on regional development of the livestock sector in Georgia, Armenia and Azerbaijan. The programme created a business model for the sustainable development of slaughterhouses based on sustainable sourcing from LHP's. The model included the development of FS&H and BDS consultancy services, which was copied and adapted by other SDC funded programmes. Crowding-in within the sector was then boosted by government funded agri-credit programmes contracting¹ the ALCP facilitated BDS and FS&H service providers as their stipulated providers, to those applying for and being awarded loans to develop slaughterhouses.

² In the case of the export of chilled halal sheep to Islamic countries, (Iran, Qatar and Kuwait) it is mandatory that the sheep are slaughtered in Halal rule under supervision of a Mullah (an educated Muslim trained in religious law and doctrine and usually holding an official post) according to requirements of importer country.

³ Not as extensive a growth however as that of the dairy. This is described in full in the *Ensuring Sustainability in the Dairy Sector* report.

⁴ Sheep intestines, stomach and liver

system and uncontrolled disposal of diseased livestock carcasses. (*See detailed information in Sectoral Constraints section, page 6*).

The sector is less transparent than that of the dairy sector. Information is considerably more difficult to obtain and key informants more reluctant to reveal information. In addition there is less of a group ethic towards advocating for sectoral changes amongst private sector players in the meat sector than that currently developing in the dairy sector. The meat sector is highly competitive as is the dairy sector, however the nature of sourcing relationships is different, dairy enterprises develop daily relationships with suppliers, in meat these are more geographically spread and far more infrequent perhaps about twice a year on average. This may be the reason why meat sector players e.g. slaughterhouse owners tend to be highly independent in their behaviour.

In addition, the switch to export particularly apparent in the sheep sector has differentiated the drivers and key constraints between the beef and sheep meat sectors. For slaughterhouses focusing on cattle for local supply, backyard slaughtering and uncompliant meat entering the formal value chain is of primary importance for those sending sheep meat for export it is fierce competition and the urgent need, built sold supply chains and to diversify their products to add value and cover operating costs.

This research details these trends and the constraints within them, as a basis for developing interventions to ensure sustainable growth in the market and to consequently stabilize and safeguard the development of slaughterhouses and sourcing practices benefitting farmer suppliers, consumers and rural communities across Georgia. (*See Table 1 Systemic Constraints, Drivers and Pro-Poor Opportunities*).

MEAT SECTOR OVERVIEW IN GEORGIA

BENEFITS OF A HEALTHY SECTOR

The production and sale of safe meat from healthy cattle is the foundation of the development of the meat sector in Georgia. Slaughterhouses, sourcing livestock from regular suppliers, are extremely important for the economic development of rural areas as they are a vital source of income for farmers. This income allows farmers to invest in inputs such as combined feed, improved breeding, veterinary services and inputs, machinery and make use of agricultural information. Meat supply has become regular in communities, where the sector is more developed. Major changes in agricultural practices are being observed including:

- Slaughterhouses use the model of direct sourcing of cattle and sheep from LHP's, rather than farmer's selling to intermediaries who may supply different markets, visit irregularly, estimate weight by eye and do not allow for the growth of a supplier buyer relationship or investment in production due to guaranteed sales.
- LHP's are being paid 6 Gel more per kilogram for processed sheep meat
- LHP's are being paid 80 Gel more for the same size sheep than last year
- Slaughterhouses are making payments to LHP's in cash
- Weighing sheep in slaughterhouses has decreased weight underestimation. Farmers were losing 5 kilograms per sheep on average as a result of the visual estimation used before.

Due to increased demand for sheep from Islamic countries, slaughterhouses have understood the importance of investing in regular sheep supply for business stability and further growth. Timely and fair cash payments are one of the main factors in ensuring the stability of the business as this means regular sheep supply from LHP's. Slaughterhouses have started to focus on long-term relationships particularly with sheep farmers, which has stimulated them to invest in sheep breeding and increase the number of sheep.

ALCP supported slaughterhouses have created 63 jobs (3 females, 60 males) and they are investing in employee well-being:

- 25 additional on call employees were hired, each earn 80-100 GEL/day
- Employees work in compliant and safe conditions wearing special uniforms
- Employees utilize compliant equipment which make their work easier and safer

POSITIVE SECTORAL SHIFTS

After signing the Deep and Comprehensive Free Trade Agreement (DCFTA), the National Food Agency (NFA) has improved inspections of slaughterhouses according to strict requirements enforced through legislation. Since January 2015, HACCP has been obligatory for slaughterhouses and dairies. Since January 2017, slaughterhouses must apply to the NFA for registration & recognition and thereby be accountable to inspection. This was implemented in conjunction with significant on-going funding made available to slaughterhouses utilizing BDS and

FS&H services developed by the ALCP, thus ensuring the further spread of the sustainable slaughterhouses model in Georgia. From January 1, 2017, legislation has required labelling⁵ and stamps on the meat, which are provided by a state licensed vet after checking the health of the sheep and cattle in the slaughterhouse before slaughtering. The SDC and ADA funded FAO/NFA implemented National Animal Identification and Traceability (NAITS) programme, which aims to put a fully comprehensive registration and traceability system in place in line with European requirements will provide accurate data to the sector and help enable sustainable.

The National Food Agency's improved animal disease control (vaccinations) and bio security measures including the Bio Security Points (BSP's) and established infrastructure and standards at the slaughterhouses have positively influenced the export of meat from Georgia and improved trust towards Georgian meat products among foreign buyers. The new BSP's have been highlighted in official government documents, foreign dignitaries visit the bio security sites. The NFA intends to use the BSP's as key organizational and operational components in its strategy for improving national animal health control, traceability and registration, building them into initiatives such as the NFA/ FAO National Animal Health and Identification System (NAITS) programme. (See *Governance Interventions in the ALCP Animal Disease Control Section*). The government has opened three official points to issue a certificate of origin required for export which made procedures quick and more flexible and accurate. The regional NFA representative recently contacted slaughterhouse advising them to what not to buy breeding females to help control a potential non-recoverable decline in the sheep population. Businesses do however think that the government should improve custom services on the border, by making the procedures more efficient. See *Supporting Functions and Rules for Export*). Serious constraints do however still exist such as backyard slaughtering fueling unfair competition and access to investment other than government loans, a growing need for the burgeoning sector. (See below)

ISSUES OF NOTE IN THE SECTOR

Policing

The main problem in the beef meat market currently is that registered slaughterhouses adhering to laws are at a disadvantage as policing and inspections tend to focus on those who comply rather than those meat shops which do not (sell the meat from backyard slaughtering). Thus compliant slaughterhouses paying their taxes and investing in compliant production, equipment, transport, are at a significant disadvantage, leading to unsustainability in the sector unless addressed. Consumers are at risk from this uncompliant meat entering the value chain often being sold in formal outlets e.g. Agrarian markets.

⁵ It is mandatory for slaughterhouses and meat shops to label meat. Labelling includes information about the type of meat, name and NFA registration number of the slaughterhouse, where the livestock was slaughtered, ear tag number or ID number of the person supplying livestock for slaughtering, date and time of receiving livestock in the slaughterhouse, time when the livestock was slaughtered, keeping conditions. This information should be put on each piece of meat. The positive and negative impact of this legislation for consumers and meat shops/formal sales can be seen in the *Consumer Section, page 13*.

Government Funding Projects

As mentioned in the introduction one of the main drivers of the development and growth of the SME meat sector in Georgia has been affordable government loans to slaughterhouses. In total \$1,874,173 for low interest loans to 24 slaughterhouses. Indeed, the two ALCP clients financed their co-financing obligation through these loans.

Since 2013 the Georgian government has launched three different programmes to support enterprises:

- The programme 'Produce in Georgia' is implemented by the Ministry of Economy and Sustainable Development of Georgia;
- Preferential Agro Credit Project is initiated by the Ministry of Agriculture of Georgia and has been implemented by the Agricultural Projects Management Agency since March 27, 2013 within the frame of 'United Agro Project';
- Co-financing of Agro Processing and Storage Enterprises. The project was initiated by the Ministry of Agriculture of Georgia and is implemented by Agricultural Projects Management Agency within the frame of 'United Agro Project', with financial support from the state budget.

What this has highlighted is that affordable funding for SME's in the meat sector is vital to ensuring the development of the sector. Investment is required by less developed entities to become compliant (Western Georgia beef) and to diversify and remain competitive (Eastern Georgia and sheep).

Tenders

A main driver of note in the beef sector has been the increased use of tenders for the supply of meat from compliant local slaughterhouses for the provision of meat to public institutions, which cater on site. This includes kindergartens, prisons, army, orphanages and psychiatric hospitals. A Ministry of government body issues a tender for the supply of meat. Local suppliers are encouraged particularly in the case of kindergartens. The benefit of the tender for the slaughterhouse is guaranteed and stable sales.

MAIN SECTORAL CONSTRAINTS

- *A lack of reliable data restricts sustainable planning and growth:* Imprecise, estimated and non-systematic livestock data impacts the sustained growth of the sector. Livestock numbers are based on census data, it is widely suspected particularly in the case of sheep that numbers are underestimated⁶. Slaughterhouses and the NFA do not currently have an operational system to collect ongoing data on slaughtered animals. Form 2's (see below) which by law must be issued by an officially licensed vet hired by the slaughterhouse for each animal and which form the basis for counting the number of slaughtered animals are commonly used for more than one animal.
- *Lack of regulation and policing:* Some meat shop owners and farmers still slaughter cattle and sheep backyard in uncompliant conditions without any health controls. Compliant slaughtering in slaughterhouses

⁶ This is a common observation of large sheep slaughterhouse owners.

is controlled through checking by a state licensed vet who issues a Form 2⁷ confirming the health and origin of the animal. Meat from cattle or sheep slaughtered backyard can easily harm human health.

- *Uncontrolled entry of uncompliant meat into the value chain:* livestock slaughtered backyard is being sold in Tbilisi and Batumi Agrarian Markets, regional markets and small meat shops. Untraceable and potential dangerous to human health, the sale of uncompliant meat alongside compliant meat produced with higher overheads creates unfair competition for registered slaughterhouses investing in FS&H.
- *Uncompliant meat shops with uncompliant meat storage practices*⁸. As above.
- *Disease notification and control remains* a key topic particularly in relation to public notification of zoonoses⁹ and safe and compliant disposal of carcasses and by-products. There is an ongoing need for comprehensive government support to the rehabilitation of the veterinary sector which suffers from a serious lack of young large animal veterinarians
- *Lack of records for livestock*, which includes information about vaccinations done, diseases, breed, veterinary treatment, ear tag.
- *Unfair competition* between slaughterhouses that results from some of them avoiding paying taxes, being uncompliant and therefore being able to offer low cost slaughtering. Several cases of this have been identified in Gardabani municipality based slaughterhouses.
- *Lack of access to affordable financing for compliant upgrades and product diversification:* The Government of Georgia has prioritized the meat sector along with the dairy sector and has supported the funding of low interest Government agro loans programmes (*see Government Funded Projects section, page 14*). In total the government has invested \$1,874,173¹⁰ in the slaughterhouses since it began the scheme in 2013. However, this is the only financing opportunity available and medium scale farmers and slaughterhouses still face problems in accessing affordable loans¹¹.

7 Form #2 is an official confirmation document issued by the NFA veterinarian attached to the slaughterhouse, stating wellness or diseases of the slaughtered livestock. Place of slaughtering (name and ID number of the slaughterhouse), weight of livestock, meat destination place (name and location of selling point), transportation means (car, truck.)

⁸ During summer time, meat shops use one refrigerator for keeping a meat and other products, such as watermelon and melon. These products can easily contaminate meat or vice versa.

⁹ A sixty year old man died of Anthrax in Khelvachauri in August and in November in Poti.

¹⁰ \$1,874,173 for low interest loans to 24 slaughterhouses. This is considerably lower than for the dairy sector.(\$13, million) This can possibly be explained by the largest most expensive slaughterhouses in Georgia e.g. Nakhtakhtari and Agro Food Ltd Akhaltsikhe, being built before the scheme by large investors. The meat has traditionally attracted large investors.

¹¹ For example:

- If the factory wants to take 7% or lower interest rate credit for the amount of \$100,000 or more, financial institutions request provision of property (usually only property in the main markets such as Tbilisi or Batumi is acceptable), which in most cases should have twice the value of the requested amount. Very often SMEs are unable to meet these criteria.
- If the factory is unable to provide the property for the requested amount, then it is forced to apply for a loan of less than \$100,000 with an interest rate of 8% or more. In this case the requested property can be of low value. However, this amount of money is not enough for SME's to cover their financial needs and the high interest rate affects profits.

MEAT PRODUCTION & PROCESSING

The meat sector is growing and the number of compliant slaughterhouses are increasing (*Please see Figure 2, Trend of Growing Number of Slaughterhouses Quarterly by Regions*). Official data¹² on the number of slaughtered cattle largely tallies with that calculated by the programme however the number of sheep seems to be under reported on *Geostat* compared to the numbers known by the programme. *Figure 1* below reflects information obtained from slaughterhouse representatives via in-depth interviews (*for more details please see Annex 3 Key Informant Interview Directory*). Based on the research findings, the largest number of cattle and sheep is slaughtered in Kvemo Kartli region and the lowest in Racha Lechkhumi and Kvemo Svaneti, the regions with less developed meat sectors. In the first 9 months of 2017¹³, 420 heads of cattle were slaughtered daily and 49,050 heads of sheep were slaughtered in Georgia monthly¹⁴.

Frozen imported meat is widely used in the manufacturing of sausage and processed products and in the HoReCa sector throughout Georgia as it is cheaper than fresh meat. This is reflected in the high import figures of frozen meat (2,300 tons of frozen beef, 2,000 tons of sheep meat as well as 22,500 tons of pork) into Georgia in 2017. The average price for frozen meat is 4Gel/kg.

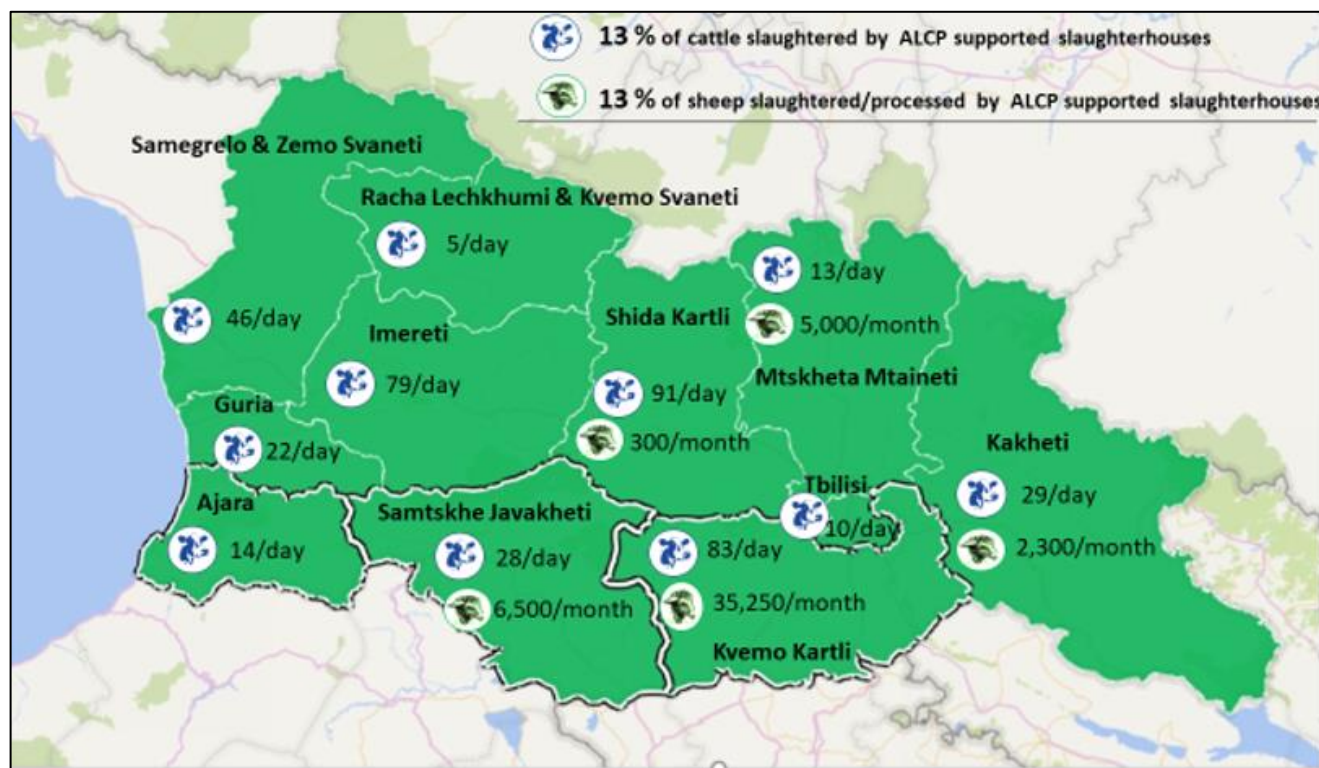


Figure 1 meat production (heads/day) by type of livestock and regions

¹² Not easily discoverable online, a key programme contact helped us find it.

¹³ Data includes information from January 2017 to September 2017

¹⁴ Out of these 13% cattle and 13% of sheep are slaughtered by ALCP programme clients, benefiting 13,224 LHP's (11.3% female LHP's).

SLAUGHTERHOUSES

There are 90 registered operational slaughterhouses in Georgia. Kvemo Kartli region has the largest number with 18 registered slaughterhouses, followed by Imereti – 14, Shida Kartli – 12 and Kakheti – 11 (see Figure 2 Trend of growing number of slaughterhouses). It is mainly Eastern Georgia based slaughterhouses who export live cattle and processed sheep meat (see Export Section). The number of slaughterhouses is lower in Western Georgia and they are basically supplying local markets with beef (see Annex 2 WG, page 17). Currently, Shida Kartli slaughter the highest number of cattle, followed by Kvemo Kartli and Imereti, while Kvemo Kartli slaughters the largest number of sheep followed by Mtskheta-Mtianeti and Samtskhe-Javakheti respectively.

The number of slaughterhouses has increased by 80% since 2010 (refer to Figure 2). The drivers for this growth are the following:

- Enforcement of Food Safety and Hygiene laws and the introduction of Form 2.
- The SDC market development programme model operating from 2008.
- Access to affordable Food Safety and Business Consulting services for slaughterhouses in regions.
- Availability of low interest Government agro loans for slaughterhouses along with Government funded BDS and FS&H consulting services.
- Other slaughterhouses copying successful business models
- Increase in formal sales outlets and use of tenders.

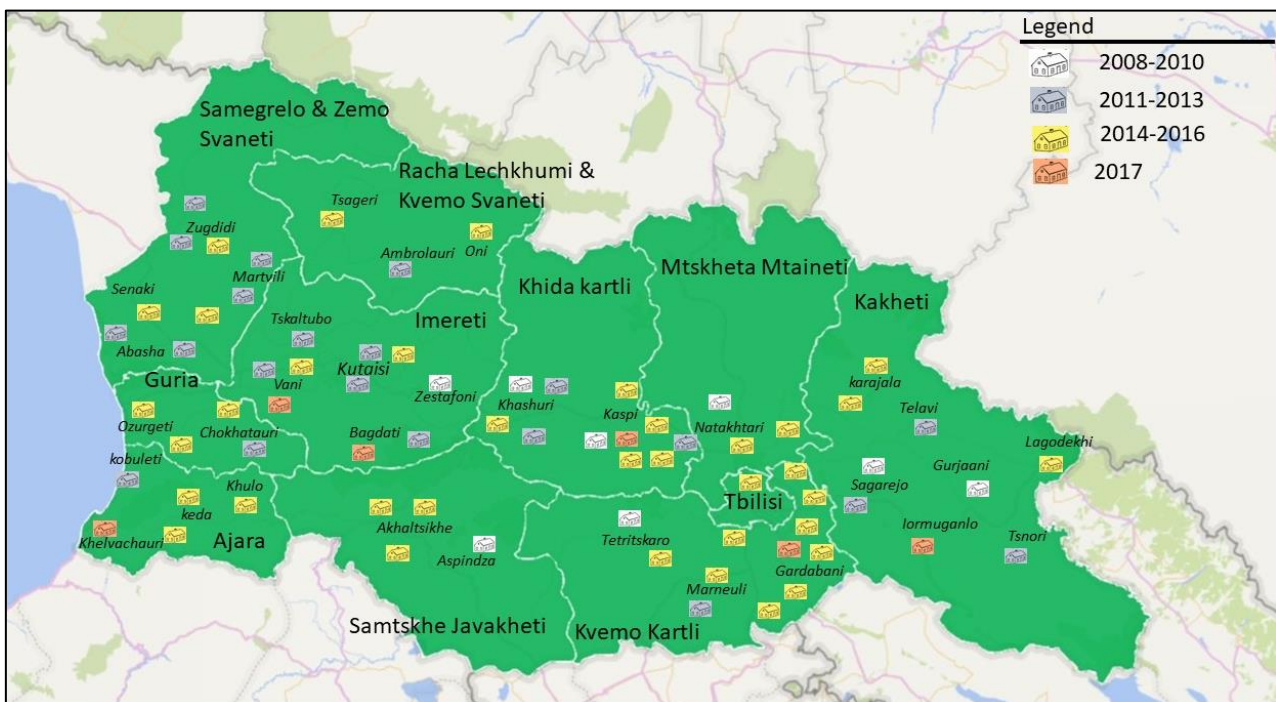


Figure 2 ¹⁵ shows a trend of growing number of slaughterhouses quarterly by regions

¹⁵ Data obtained from key informant interviewers Annex 3.

THE ECONOMIC BENEFITS OF THE SLAUGHTERING BUSINESS

The main clients of the slaughterhouses (cattle) are meat shop owners. Each meat shop slaughters about one cow/day. The average price of slaughtering services throughout Georgia varies from 30 to 50GEL/cow and 12GEL/sheep. The business model of the slaughterhouses has changed from providing mostly slaughtering services to direct sourcing cattle and sheep from farmers mostly as a result of entering into new markets such as supplying tenders, supermarket chains and export markets. Sheep slaughtered in slaughterhouses are mainly only for export. Slaughtering services provide a stable income to slaughterhouses and sales of sheep hides, by-products, and cattle hides generate extra income for them.

- Cattle hides are sold for 1.5Gel/kg, to a Tbilisi based company, which exports them to Turkey.
- Sheep hides are sold for 1Gel/sheep hide to a Tbilisi based Turkish company, which exports hides to Turkey.
- Sheep by-products ¹⁶are sold for 4-5Gel/kg in the local market, but in a very small amounts, as the local demand is very low.
- There is a new demand from Iran for sheep by-products. Marneuli municipality based slaughterhouse *Alali Ltd* signed a contract with Iranian company to supply sheep by-products at \$3-4/kg. In addition there is new from China for sheep stomachs, and the slaughterhouse has already sent 9 tons to China as a trial consignment at 5 Gel/kg. In general income generated from hides and by-products covers almost half of operational costs of the slaughterhouses such as salaries for part-time staff, utilities, transportation costs.

MEAT VALUE CHAIN

Meat Value Chain Overview

The meat value chain is quite complex involving various market actors given in Figure 3 below. Even though the number of slaughterhouses have increased throughout the country, meat traders practicing backyard slaughtering are still existent in the chain. At the sales end there are still a large number of small & medium non-registered traders/intermediaries ¹⁷buying livestock in regional livestock markets¹⁸ and from farmers in villages and selling cattle mainly to slaughterhouses and exporter intermediaries.

¹⁶ Cattle by-products are mainly not sold because they are taken by clients: i.e. intermediaries and LHP's

¹⁷ These traders/intermediaries are operating unofficially, thus it is difficult to find them and take some information

¹⁸ The biggest livestock markets in Georgia are: Marneuli (Kvemo Kartli), Iormuganlo (Kakheti), Akhaltsikhe (Samtskhe Javakheti) and Kabali (Kakheti). The livestock from all over Georgia is sold at this markets on every weekend.

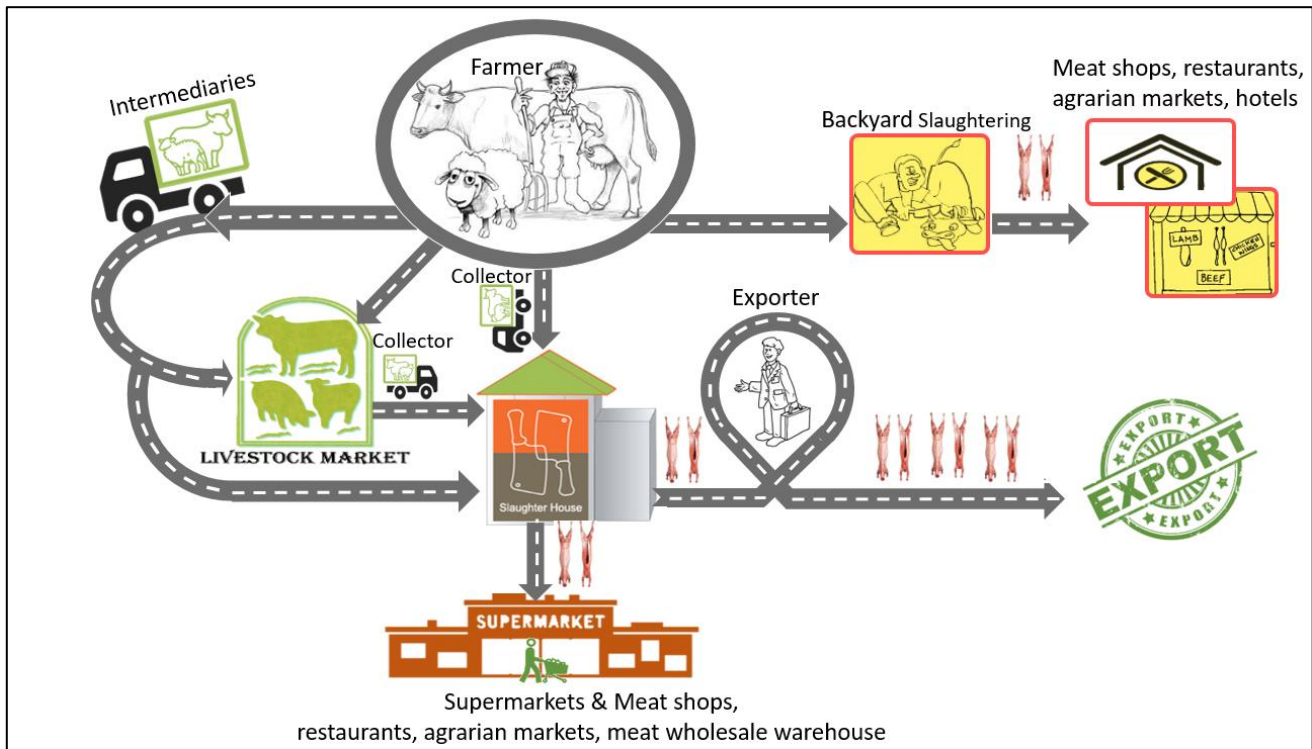


Figure 3: Meat value chain

Agrarian Markets

The conditions of selling meat in agrarian markets have changed in recent years. For example, new buildings for agri markets have been constructed or renovated in Tbilisi, Marneuli, Rustavi, Batumi, Kutaisi and Akhaltsikhe where the meat is sold in meat sections in more compliant conditions. In these places, meat is sold by meat sellers, who keep meat provided with a Form #2, in refrigerators. However, uncompliant sales still exist in some agrarian markets (*Box 1 below provides an example*).

BOX 1: Batumi Agri market (BAM)

Uncompliant sourcing and sales in BAM is a critical constraint undermining growth of slaughterhouses throughout Western Georgia. Behind Batumi Agri Market, in the territory that does not belong to BAM, uncontrolled wholesale trade of meat takes place. Intermediaries from WG regions come from early morning, 5 a.m. and the trade lasts until 7 a.m. and does not comply with FS&H conditions. The meat is mainly brought in dirty unrefrigerated vans. It is sold together with meat that has been slaughtered compliantly and which is accompanied by a Form #2. On the Form #2, the final transportation place is identified as BAM, however the meat is not checked by the BAM vet, since the trade place is outside the market. Since the average price difference between compliant slaughtered and backyard slaughtered meat is 2 GEL per kg, the compliant slaughterhouses are losing out. The main clients of the backyard intermediaries are local buyers, HoReCa sector distributors, meat shops and BAM stallholders. The uncompliant sale of meat is not controlled the NFA or Batumi City Hall's Supervision Department. Backyard slaughtered meat being sold or used in hotels puts the health of local consumers and tourists of the region at risk. The ALCP has facilitated BAM in awareness raising of and advocacy of this issue to relevant competent entities and increasing consumer awareness of compliant purchasing of meat.

Small meat shops

Small meat shops mostly sell beef which is unlabeled but comes with a Form #2 from a slaughterhouse. Sheep meat sold in meat shops located in Azeri populated communities mainly comes from backyard slaughtering without a Form #2. Meat shops are located in or close to agrarian markets, in the centers of villages and in all cities around Georgia. Most of these meat shops are uncompliant and are not regularly checked by competent authorities. However, according to FS&H law it is obligatory for them to be compliant with FS&H requirements.

Formal Sales

Meat is sold in supermarkets in compliant conditions, kept in proper refrigerators with a Form 2 and labeled displaying general information about the meat supplier (name, address, registration number). (*Detailed information is given in Consumer section, page13*)

Export

Exported halal sheep meat is compliant. Sheep is slaughtered and processed in a slaughterhouse according to Halal rules and the slaughtering process is supervised by a mullah¹⁹ and a veterinary specialist representing the importer company, as well as a state licensed vet. Sheep carcasses are stamped, covered by gauze, hung on stainless steel hooks and exported via refrigerator truck, which mainly goes by road to Islamic countries overland via Armenia.

CONSUMERS

Consumers in Georgia buy meat in supermarkets, small markets, small meat shops and in agrarian markets. Those consumers, who buy meat in small meat shops or 'kiosks' near their house or by the side of the road, think that the meat is fresh, newly processed and that because they know the meat seller or owner feel that they are more trustworthy, even if FS&H conditions are not kept in the meat shop. These consumers also prefer buying meat in a small shop, 'kiosk', because they are buying meat 'on tick', so called 'Nisia²⁰'. The tendency for buying meat in formal outlets has increased in recent years, consumers living in big cities, such as Tbilisi, Batumi, Kutaisi, Rustavi, are more likely to buy and pay more money for meat sold in compliant conditions. Purchasing meat from supermarkets is a trend that is growing in Georgia driven by the growth in formal outlets selling nicely packaged meat in clean surroundings but also since changes were made in beef labelling regulations. Consumers are paying more attention to the origin of meat, sales conditions, price promotions and quality. Supermarkets are also increasingly starting to butcher meat and sell different cuts, thus consumers can select a cut they want.

Cross Border Trade and Export

Research results show that Azerbaijan is the top export country for Georgian live sheep, followed by Saudi Arabia (*see Figure 4 below for more details*). Iraq imported the most live cattle ²¹ in 2015-2016. Currently there are 15 private companies in Georgia officially exporting live cattle and sheep to Islamic countries. The export of calves to Azerbaijan has increased since spring 2017. Export of *halal* processed sheep has replaced the export of live sheep for the last year and a half.

¹⁹ Muslim man or woman, educated in Islamic theology and sacred law

²⁰ When the customer can pay later.

²¹ No export detected for live cattle and sheep in 2017 for Iraq.

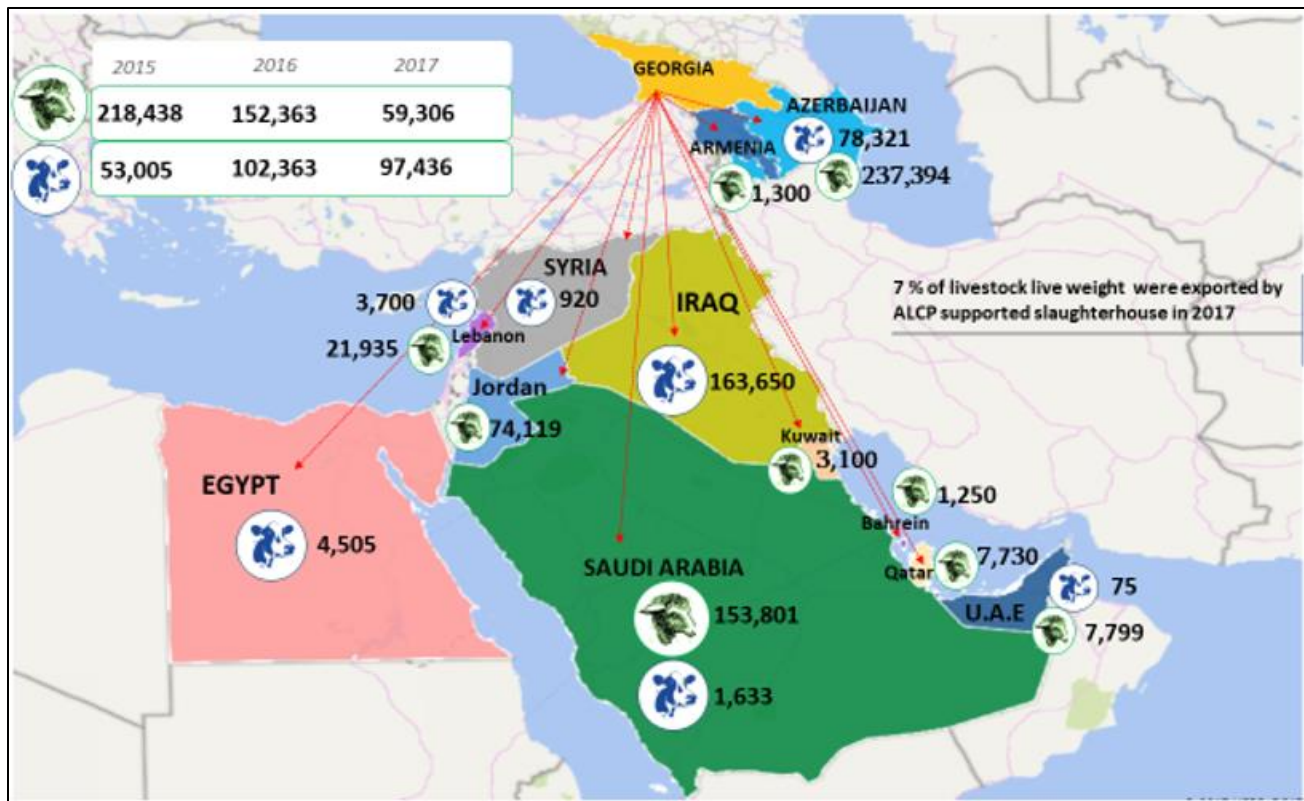


Figure 4²² Export of livestock live animals from Georgia to different countries by year

Demand for Georgian chilled halal sheep meat has rapidly increased in the last 2 years. Iran is the top importer of Georgian chilled sheep meat and is steadily increasing the demand.

In April 2017 the Government of Georgia and the Ministry of Agriculture of Iran signed a Memorandum of Understanding with the goal of deepening trade and their economic relationship. Since then, the volume of exported chilled halal sheep meat by registered slaughterhouses has been increasing rapidly. 10 private exporter companies exported 233,562 heads of chilled halal sheep to Iran, out of which 41,197 (18%) was exported by the ALCP funded slaughterhouse *Alali-2015 LTD*. (See Figure 5 below for more details).

²² Data obtained from NFA



Figure 5²³ Export of Sheep and Cattle meat (chilled halal meat) from Georgia to different countries by years

²³ Data obtained from NFA

PROPOSED ENTRY POINTS

Table 1 Systemic Constraints, Drivers and Pro-Poor Opportunities

Systemic Constraints	Drivers & Pro-Poor Opportunities	Entry points
Beef Core Market		
<ul style="list-style-type: none"> - <i>Lack of enforcement</i> over uncompliant slaughtering and supply and sale of uncompliant meat entering the value chain (beef) - <i>Unfair competition:</i> uncompliant enterprises with very small overheads undercutting compliant slaughterhouses - <i>Lack of consumer awareness</i> of labelling, potential risks and rights. - <i>SME's lack finance/information:</i> to upgrade facilities to improve competitiveness e.g. through further processing or being compliant (West Georgia). 	<ul style="list-style-type: none"> - Slaughterhouses undercut by uncompliant operations are not sustainable and cannot offer the benefits of direct sourcing to suppliers and help improve planned production and increase profit. <li style="padding-left: 20px;">If consumers are aware of the risks of uncompliant meat they can put pressure on sales outlets to provide /choose to buy safe labelled meat. - A regular/stable market will create the potential for farmers to upgrade their production e.g. planning, feed, breeding and obtain increased income. 	<p>Facilitation of sectoral interests with NFA (Advisory Committee)</p> <p>Facilitation with NFA/media/ supermarkets for increased understanding of potential risks of buying uncompliant meat and consumer rights.</p> <p>Facilitating key private sector actors to upgrade and diversify. Facilitate more advantageous dispersal of international finance organisation funds to SME's. (Credo/TBC)</p>
Bio Security		
<p><i>Farmers: Lack of interest & knowledge</i> about benefits and rationale of animal identification and registration process in terms of animal disease control</p> <p><i>Farmers & Local Government: Poor carcass disposal system</i> and facilities increases risks of spreading various dangerous diseases including Anthrax and diseased meat entering food chain. Undermining meat value chain.</p> <p><i>Government: Less than optimal management of BSP's</i> and ongoing issues on AMR currently and lack of clear future planning hamper the sustainability BSP's and National & Regional Bio Security Control</p>	<p>Well-informed farmers understand and fully use the benefits of the process and will be in compliance to the new regulations and market requirements</p> <p>Farmers safe from new sources of dangerous animal diseases; healthy animals means increased meat/milk yield and more income</p> <p>More sheep & cattle farmers are able to benefit from BSP's and treat their animals against diseases</p>	<p>Facilitation to develop a comprehensive public information provision campaign on animal identification & registration process with NFA & FAO/NAITS</p> <p>Facilitation of safe carcass disposal practice by implementing pilot of the first ever municipal incinerator in Bolnisi Municipality</p> <p>Facilitate the NFA to improve BSPs management and network to underpin the development of cross border trade and export, promote Georgian sheep/sheep products at international markets. Including presentation of Critical Analysis at Advisory Committee Meeting in early 2018.</p>

Sheep Core Market

<ul style="list-style-type: none"> - <i>Potential Undermining of Supply:</i> Risk to sheep population/supply. Export of large amounts of processed sheep could decrease the number of sheep in the country unless managed. - <i>Ensure that growing competition continues to benefit target group:</i> Fierce competition for sheep. Slaughterhouses and traders need to diversify to remain competitive in the sheep market attracting farmers through fair or increased payment per sheep to stabilize and safeguard their supply. 	<ul style="list-style-type: none"> - Huge demand from Islamic countries for processed chilled halal sheep meat, can provide a stable and lucrative market for sheep farmers producing grass feed lamb/mutton, thus enabling farmers to sell more sheep, increase income and improve sheep husbandry. However, they must be aware that the market opportunity is ongoing and not a one-time only opportunity with farmers thinking they must capture good prices now rather than plan. - Increased in-country processing of the fifth quarter offers more growth opportunities to the sector. Allows increased payment per sheep. This will stimulate farmers to increase sheep number and improve sheep breed. 	<ul style="list-style-type: none"> - Facilitate private sector/government players/media to communicate the full scope of the sheep market opportunity to farmers and safeguard and develop the sheep sector. - Facilitation of product diversification (by-products and other parts of sheep) with private sector.
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ANNEX 1: METHODOLOGY

The information covered in this report is based on both primary and secondary sources. Primary research was conducted via in-depth interviews with slaughterhouse representatives (mainly managers or owners). Secondary research included relevant publications obtained through the websites of the Ministry of Economy and Sustainable Development of Georgia, national statistics *Geostat* and the NFA database:

<http://nfa.gov.ge/ge/sursatis-uvnebloba/agiarebis-gzamkvlevi>

<http://apma.ge/maps/>

<http://www.geostat.ge/>

<http://www.rs.ge>

The meat market research was carried out during September-October 2017.

- The survey covered 69 livestock slaughterhouses out of the 90 registered ones²⁴;
- The survey was conducted by ALCP team members. In-depth interviews were conducted by phone or in person.

The main challenges encountered during the research:

- The meat market research team used the list of slaughterhouses, which was provided by the National Food Agency. Many business operators did not want to be interviewed and to take a part in the research, saying that ‘information about their business is confidential’, some of them did not answer calls, even after giving a promise to provide general information about their businesses.

Table 1 Number of interviewed livestock slaughterhouses per region

	# of Interviewed slaughterhouses
Tbilisi	1
Kvemo Kartli	12
Shida Kartli	11
Kakheti	10
Mtkheta Mtianeti	1
Samtskhe-Javakheti	4
Imereti	9
Ajara	5
Samegrelo and Zemo Svaneti	9
Guria	4
Racha Lechkhumi and Kvemo Svaneti	3

²⁴ Source: [list of registered slaughterhouses](#)

ANNEX 2: THE MEAT MARKET IN WESTERN GEORGIA (GURIA, SAMEGRELO, IMERETI)

Western Georgia is the largest producer of beef and beef products in Georgia, 48%²⁵ of totally produced meat (more than 21 000 tonnes per year) is produced here. A significant share of beef production is concentrated in Imereti and Samegrelo regions, 22% of total beef is produced in Imereti and 15% in Samegrelo. At the same time these two regions remain the leaders in animal husbandry, 37.6% of total number of cattle is present in Imereti and Samegrelo regions. Guria is considered to be one of the poorest regions of Georgia, where the number of cattle as well as volume of beef produced is quite low and represent insignificant share in a total market share.

Table 1: Beef Production in Western Georgia (thousands of tonnes)

	2015	2016
Whole Georgia	24.4	21.5
Guria	N/A	0.5
Imereti	5.5	4.7
Samegrelo-Zemo Svaneti	3.3	3.2
Ajara	N/A	2.0
Total volume of beef produced in WG	N/A	8.4

Source: Geostat

Table 2: # of cattle in Western Georgia (thousands of heads)

	2015	2016
Whole Georgia	992.1	962.7
Guria	N/A	48.5
Imereti	168.4	171.4
Samegrelo-Zemo Svaneti	199.7	190.8
Ajara	69.7	70.3
Total # of cattle in Western Georgia	N/A	8.4

Source: Geostat

There are 29 slaughterhouses in Guria, Imereti and Samegrelo regions that were developed since 2010, driven by regulation to ensure that livestock would increasingly go through official channels. Out of 29 slaughterhouses 19 were selected and surveyed. Distribution of slaughterhouses and # of interviewed slaughterhouses per region are given in the table #8 below.

Table 3: Distribution of slaughterhouses and # of surveyed slaughterhouses per region

	Guria	Samegrelo	Imereti
Total # of slaughterhouses per region	5	10	14
# of Interviewed slaughterhouses	4	6	9

²⁵ www.geostat.ge

PROFILE OF THE SLAUGHTERHOUSES

Guria

Guria based slaughterhouses are less developed (infrastructure, size, FS&H standards) and smaller compared to Imereti and Samegrelo based slaughterhouses. All 4 interviewed slaughterhouses provide slaughtering service to meat traders/butchers mainly from Ozurgeti and Chokhatauri Agri Markets and butcher shops. Only 20% of their meat traders sell meat in Batumi Agri Market. 2 Slaughterhouses use direct sourcing model as well, in order to supply its own meat shop and café. Slaughtering price varies between 25-35 Gel/cow depending on live weight. Average maximum capacity of the slaughterhouses is 25 cows per day, however the throughput is very low (see the Table #4, p.3). Guria based slaughterhouses slaughter only matured cattle, therefore price for slaughtering is a little bit higher compared to Imereti and Samegrelo based slaughterhouses. Only Chokhatauri based slaughterhouses have refrigerator vehicle for meat distribution. Ozurgeti based slaughterhouses have a contract with Ozurgeti based company that provides distribution service via refrigerator vehicles. All Guria based slaughterhouses have access to FS&H consultancy services. 2 Slaughterhouses used Star Consulting service for implementing HACCP. According to the owners of slaughterhouses, HACCP is established in all 4 slaughterhouses. However, arrangement of the slaughterhouses and equipment do not fully comply with FS&H standards. In Guria, only 1- Chokhatauri based slaughterhouse has received business operator's recognition from NFA.

Samegrelo

Out of 6 slaughterhouses surveyed only 1 slaughterhouse use direct sourcing model but in parallel to the service model. All the rest work on service and provide it to local meat traders/butchers, meat traders from Tbilisi and Batumi Agri Market. The maximum capacity of the slaughterhouses reaches 50 cows a day, however throughput is very low (refer to the Table #4, p.3). The slaughterhouses are equipped with ref vehicles to distribute meat. All slaughterhouses have access to FS&H consultancy services. Only Martvili based slaughterhouse does not have HACCP established due to lack of finances. The biggest slaughterhouse is based in Abasha and it is the only slaughterhouse in Samegrelo that received business operator's recognition from NFA.

Imereti

Compared to Guria and Samegrelo, Imereti based slaughterhouses are bigger and have better FS&H conditions. The survey revealed that among 3 surveyed regions only Imereti based slaughterhouses provide calves slaughtering. Out of 9 slaughterhouses, only 1 slaughterhouse use mainly direct service model, 3 slaughterhouses combine direct sourcing model as well as service model and the rest work on service. The Main clients are meat traders/butchers of local Kutaisi market as in other regions. Only 1 slaughterhouse (that works on direct sourcing) directly supplies meat to HoReCa sector in Batumi. Among surveyed slaughterhouses it was revealed that Kutaisi based slaughterhouse *Kutaturi Ltd* is willing to increase its turnover by exporting meat in Turkey and Iran. All slaughterhouses except Tskaltubo based, have access to FS&H consultancy companies and 2 slaughterhouses used Star Consulting service. According to the owners, HACCP is implemented; however only 1 slaughterhouse has received business operator's recognition from NFA.

SURVEY FINDINGS

During the survey it was revealed that:

- ✓ Slaughterhouses using direct sourcing model have won different types of tender or is in ownership of Agri market owners, meat shop owners;
- ✓ Samegrelo and Guria based slaughterhouses slaughter mainly matured cattle, while Imereti based slaughterhouse mainly slaughter calves due to differences in consumption habits;
- ✓ Big and FS&H compliant slaughterhouse have smaller throughput compared to smaller and FS&H non-compliant slaughterhouses;
- ✓ HACCP is implemented in almost all slaughterhouses; however, in small slaughterhouses FS&H conditions are not fully complied with.
- ✓ Waste management systems are more or less in place as all slaughterhouses have signed contract with municipal transport to take out the solid waste;
- ✓ None of the interviewed slaughterhouses has experience of exporting meat or cross border trade and out of 19 interviewed slaughterhouses only 1 have ambition to expand sales market through export channels.

The constraints still remaining in the sector are the following:

- ✓ Meat market is not well-controlled; back yard slaughtering of mainly matured cattle is still frequent in all regions. This kind of meat is mainly sold behind Batumi Agri Market building (wholesale trade);
- ✓ Slaughterhouse owners are discouraged to participate in tenders and sign contracts with supermarket chains, HoReCa sector as they cannot ensure stable supply of meat due to decreased number of cattle in the region and increased price on live weight;
- ✓ NFA has a different inspection approach towards FS&H compliant and uncompliant slaughterhouses, meaning that compliant slaughterhouses are inspected more frequently and strictly that has created unhealthy competition;
- ✓ The majority of the slaughterhouses lack financial resources to arrange and renovate the premises, purchase distribution vehicle and diversify production.

The summary of the survey finding is provided in the table #9, p.19:

Table 9: Slaughterhouses in the Programme Area

	Municipality	Operating since	Max Capacity cows/day	Current Through put cows/day	Slaughter price/cow (GEL)	Working model	Customers	Access to FS&H services
Guria								
Gigilu Ltd	Ozurgeti	2015	20	4-5	35	service	80% meat traders/butchers from Chokhatauri and Ozurgeti Agri markets, 20% from Batumi	✓
Guria Ltd	Ozurgeti	2014	25	3-4	35	service		✓
Ertoba Ltd	Chokhatauri	2014	30	10-15	30	70% service, 30% direct sourcing- the owner is a butcher in Chokhatauri		✓
I.E. Amiran Kakuria	Chokhatauri	2012	25	1-2	25	90% service, 10% direct sourcing - supplies kindergarten and its own café		✓
Samegrelo								
Maolta 2012 Ltd	Abasha	2012	25	10-12	15-25	80% service, 20 % direct sourcing- supplies Batumi based <i>Goodwill</i>	Meat traders/butchers from Poti, Senaki, Zugdidi and Batumi Agri market	✓
Abasha Nobati Ltd	Abasha	2013	30	4	25	service		✓
I.E Vakhtang Dadiani	Zugdidi	2013	20	7-10	30	service		✓
I.E. Tengiz Khotcholava Chelo	Senaki	2014	15	4-5	15-35	service		✓
I.E. Kote Kotia	Martvili	2013	50	3-4	15-22	service		✓
I.E. Gia Kadjaia	Martvili	2012	35	5-9	10-25	service		✗
Imereti								
Kutaturi Ltd	Kutaisi	2011	120	35-40	10-30	service	70% meat traders/ Butchers from Imereti, 10% from Tbilisi, 20% from Batumi	✓
Nikora 2015 Ltd	Kutaisi	2011	50	10	13-30	90% service, 10% direct sourcing – supplies kindergarten in Tskaltubo and Bagdati		✓
Tsikara Ltd	Vani	2014	8-10	1-3	15-35	90% service, 10% direct sourcing – supplies Batumi Agri Market		✓
Bochola Ltd	Vani	2011	150	3-7	20-25	service		✓
Ekimbeki Ltd	Zestaponi	N/A	200	1	N/A	service		✓
Gurama Ltd	Khoni	2013	35	5-6	20-30	90% Service, 10% direct sourcing –supplies kindergarten in Khoni		✓
I.E. Rezo Garuchava	Bagdati	2012	15	2-3	15-35	service		✓
I.E. Emzar Jimshelashvili	Tskaltubo	2012	50	4-5	15-30	service		✗
Togo Ltd	Tskaltubo	2015	50	8-9	N/A	10% service, 90% direct sourcing- supplies HoReCa sector in Batumi		✓

ANNEX 3: KEY INFORMANT INTERVIEW DIRECTORY

#	Key Informant	Date	Organization/ Specialization	Location and Link to Project
COUNTRY: GEORGIA				
MEAT: CORE MARKET				
KI 1	Avtandil Makharadze, (owner) - slaughterhouse Gigilu Ltd 599 432 444	May, 2017	Slaughterhouse	Likhauri, Ozurgeti, Guria: has been functioning since August 2015. It is family business and employs 1 woman and 8 men in full time jobs. At present the slaughterhouse slaughters 3-6 cows per day depended on seasons. Price of slaughtering is 35 Gel per cow. The slaughterhouse works on service and 90% of its clients are meat sellers. It is equipped with disinfection barriers, saw, and stainless inventory, ref rooms etc. Regarding FS&H, the client received trainings by Star Consulting and HACCP is implemented in the slaughterhouse. Regarding the waste management, slaughterhouse has septic tanks, for solid waste, it has a contract with a company that takes the waste at the end of each day. The service costs 200 Gel per month. The slaughterhouse does not own a ref vehicle; it has a contract with an Ozurgeti based company. For future, the client plans to start meat processing and make kupati. The main constraint is lack of live cattle in the region that decreased the demand on service.
KI 2	Shako Oragvelidze (owner) - Guria Ltd 557 41 09 09	May, 2017	Slaughterhouse	Dvabzu, Ozurgeti, Guria: has been functioning for 3 years already. Last year a new building was built for the slaughterhouse. It employs 7 men and 2 women on part time jobs. Currently the slaughterhouse slaughters from 100 to 150 cows per month. Slaughtering price is 35 GEL per cow. The slaughterhouse works on service and 80% of the clients are meat sellers from Ozugeti Agri market who bring cattle in the slaughterhouse and 20% meat sellers from Batumi. The slaughterhouse is equipped with all necessary inventories (saw, stainless tables). Regarding the ref vehicle for meat transportation, the slaughterhouse has a contract with an Ozurgeti based company. Regarding FS&H, the company does not yet received recognition from NFA, however according to the owner HACCP is established in the slaughterhouse by SDC Group. What concerns waste management, the slaughterhouse has 2 septic tanks construction of which was agreed with regional environment protection agency. For solid waste the company has a contract with a local company that takes the solid waste at the end of the day. For the future, the slaughterhouse plans to start meat and stripe processing. Arrangement of the slaughterhouse was copied form Kutaisi based slaughterhouse. The main constraint is lack of live cattle in the region that decreased the demand on service.
KI 3	Nino jgenti (vet)- Ertoba Ltd S599522616 (Soso, owner)	May, 2017	Slaughterhouse	Chokhatauri, Guria: was established in 2014 by meat traders. At present it slaughters 10 to 15 cows per day depended on seasonality. The slaughterhouse works on service as on direct sourcing. It has a special truck for sourcing and cattle are purchased from about 100 farmers of Guria. Slaughter price is 30 GEL (price of the hide is included). Main

				sales market is Batumi and Ozurgeti. The slaughterhouse has ref vehicles for transporting meat. It is equipped with carcass saw and some stainless equipment. According to the vet, HACCP is established in the slaughterhouse by SDC Group ltd however from our point of view arrangement of the room did not meet FS&H requirements. Regarding waste management, the company has a contract with an Ozurgeti based company that takes the solid waste at the end of each day when the slaughtering process was done. For the future the company want to purchase equipment for cleaning cattle stripe.
KI 4	Amiran Kakuria (owner) - I.E Amiran Kakuria Chokhatauri 591 20 12 22 / 551 20 12 22	May, 2017	Slaughterhouse	Chokhatauri, Guria: has been operating since 2012. It was the 1 st slaughterhouse in the region. At present, it is the biggest slaughterhouse in the Guria region that has already received recognition from NFA. Currently it is slaughtering 35-60 cows per month. Price of the service is 25 Gel per cow. The slaughterhouse works on service as well as direct sourcing model. It won tender and supply kindergartens, beside it serves some restaurants in the region and 1 meat shop. But by the way, at the moment, the slaughterhouse does not have a good sales market and it is the biggest constraint for its functioning. The slaughterhouse was contacted by Carrefour hypermarket and asked to supply 3 tonnes of meat per week. However, the owner told that there are not live cattle in the region and he will not be able to ensure the regular supply of the hypermarket. Regarding FS&H, the slaughterhouse meets all FS&H requirements and HACCP is established by STR Consulting Company that hired Eka Burkadze as an expert. What concerns waste management, it has a septic tank projects that is agreed in local environment protection agency. According to the owner main constraint is lawlessness in the sector as Mr Kakuria told another slaughterhouse is not meeting FS&H standards, however local NFA does not close it or even give a fine.
KI 5	Merab Rukhadze (vet)- Maolta 2012 ltd 591963307	May, 2017	Slaughterhouse	Zanati village, Abasha: has been operating since 2012. It employs 2 women and 9 men of full-time jobs. At present it slaughters from 8 to 17 cows depended on seasonality. Price of slaughtering varies from 15 to 25 GEL. The slaughterhouse works on service as direct sourcing. It purchases 4-5 cows per day and supplies Batumi based Goodwill hypermarket with 500kg of meat 3-4 times per week. Regarding the service, main clients are meat sellers from Poti and Zugdidi Agri markets. The slaughterhouse has a vehicle to transport cattle and 1 ref vehicle. As the vet told the slaughterhouse is not able to participate in tenders because it will not be able to ensure timely supply of meat by 1 ref vehicle. For the future the slaughterhouse is planning to make processing room. HACCP is implemented by MS company. Regarding waste management, the slaughterhouse has a contract with local municipal transport and solid waste is taken at the end of each day. The slaughterhouse has a temporary recognition till the end of September. The slaughterhouse does not have proper carcass saw and stainless equipment. According to the slaughterhouse reps main constraint of the slaughterhouse is unhealthy competition among slaughterhouses, as other slaughterhouse do not meet FS&H standards, however they are operational.
KI 6	Noe Katcharava (owner) 'Abasha Nobati' ltd	May, 2017	Slaughterhouse	Abasha, Samegrelo: has been operating since 2013. It employs 1 woman and 8 men on full-time jobs. At present it slaughters maximum 4 cows per day. Initially the

	574 82 51 51			slaughterhouse was processing meat and producing kupati, but currently it works only on slaughtering service. Price of slaughtering is 25 Gel per cow. Main customers of the slaughterhouse are Poti, Kutaisi and Batumi Agri market meat sellers. HACCP is established by SDC group; however, from our point of view the slaughterhouse does not meet FS&H requirements. Regarding waste management, it has a contract with municipal transport that takes solid waste at the end of each day. The slaughterhouse has a temporary recognition till the end of June. Main constraint of the slaughterhouse is decreased demand on its services; therefore the owner thinks to close the slaughterhouse.
KI 7	Vakhtang Dadiani (owner) – I.E Vakhtang Dadiani 595 85 89 61	May, 2017	Slaughterhouse	Zugdidi, Samegrelo: has been operating since 2013. It employs 2 women and 18 men. The slaughterhouse works on service model. Currently it slaughters 7-12 cows depended from seasonality. Price of the slaughtering is 30 Gel per cow. Main clients of the slaughterhouse are meat sellers from Zugdidi Agri market, who bring cattle in the slaughterhouse. HACCP is implemented by SDC group, however arrangement and equipment of the slaughterhouse does not fully meet FS&H requirements. Solid waste is taken by municipal transport; liquid waste is directly flowing to the city's sewerage system. The slaughterhouse has a temporary recognition, for the last visit of NFA it received recommendation regarding water analysis. Main constraint of the slaughterhouse is decreased demand on service, that the owner explains by decreased number of cattle in the region. At the same time slaughterhouse does not have a ref vehicle and proper carcass saw.
KI 8	Kakhaber Gvenetadze – owner of Nikora 2015 Ltd, 574 88 83 95	June 2017	Slaughterhouse	Kutaisi, Imereti: has been functioning since 2011. It employs 2 women and 13 men on full time jobs. The slaughterhouse slaughters on average 10 cows per day. Price of slaughtering varies from 13 to 30 GEL depending on the live weight of cattle. The slaughterhouse works mainly on service but is uses direct sourcing model as well to supply kindergartens of Tskaltubo and Bagdati Villages with 200-250 kg of meat per week. The slaughterhouse has 1 track to transport cattle and 2 ref trucks for meat distribution. Main clients of the slaughterhouse are meat sellers from Kutaisi. The slaughterhouse is equipped with carcass saw, stainless inventory, ref rooms etc. Regarding FS&H, the client has not yet obtained recognition from NFA, 10 days ago NFA inspected the slaughterhouse and recommended to purchase disinfection barriers. HACCP was established by MS system company. Regarding the waste management, slaughterhouse has septic and bio thermic tanks. Main constraint of the slaughterhouse is lack of finances that hampers to purchase proper carcass saw and renew the slaughterhouse. For the future the business operator plans to enlarge meat processing room.
KI 9	Nikoloz Popkhadze - director of Tsikara Ltd, 595 90 80 54	June 2017	Slaughterhouse	Vani, Imereti: has been operating since 2014 and employs 3 men on full-time jobs. The slaughterhouse provides slaughtering service to 5-6 local meat sellers as well as direct sourcing, as one of the owners of the slaughterhouse is ind. entrepreneur who distributes meat to Batumi Agri market. The slaughterhouse slaughters 1-3 cows per day. The price of slaughtering varies from 15 to 35 GEL and depends on live animal weight. The slaughterhouse does not have its own truck

				to transport live cattle, it has only 1 ref vehicle for meat distribution. Regarding waste management, for solid waste the slaughterhouse has a contract with municipal transport, for liquid waste it has 2 septic tanks. The slaughterhouse has not yet received the recognition of business operator from NFA, the arrangement of rooms does not meet FS&H standards. HACCP is in process of establishing by SDC Group. The slaughterhouse has some stainless equipment, carcass saw, but in general it does not comply with FS&H requirements.
KI 10	Rezo Garuchava – owner of I.E. Rezo Garuchava, 593 32 88 33	June 2017	Slaughterhouse	Bagdati Village, Imereti: has been operating for 5 years. The owner was forced to purchase local Agri market and construct slaughterhouse by former Government of Georgia. At present the slaughterhouse employs 2 women and 3 men. 2-3 cows are slaughtered per day. The slaughterhouse works on service model and supplies 2 local meat shops and 7 local Agri market meat sellers. Slaughter price varies from 15 to 35 GEL based on live weight of the cattle. Regarding waste management system, solid waste is taken by municipal transport and liquid waste is directly flowing to local sewerage system. Regarding FS&H, arrangement of rooms is agreed with NFA, the slaughterhouse is arranged with stainless equipment, carcass saw, ref rooms. The slaughterhouse does not have a ref vehicle and it has a contract with a local company for meat distribution. HACCP is established by SDC group and according to the owner 2 months ago the slaughterhouse received recognition from NFA. The owner wants to sell the slaughterhouse as according to him the slaughterhouse does not generate any profit, because other slaughterhouses that do not meet FS&H requirements work better.
KI 11	Emzar Jimshelashvili – owner of I.E. Emzar Jimshelashvili, 598 41 12 77	June 2017	Slaughterhouse	Tskaltubo, Imereti: has been functioning since 2012 and employs 1 woman and 4 men on full-time jobs. 4-5 cows are slaughtered per day. Price of slaughtering varies from 15 to 30 GEL. The slaughterhouse works on service model and its main clients are approximately 10 meat sellers from Kutaisi and Tskaltubo Agri markets. The slaughterhouse does not own ref truck and meat is distributed by normal car that does not comply with FS&H regulations, therefore last time NFA fined the business operator and did not give recognition. Regarding the equipment, the slaughterhouse has a big soviet time building and is equipped with some of soviet time equipment, it does not have a proper carcass saw. Initially the slaughterhouse made 1.5-2 tonnes of sausage per week and have some equipment for meat procession, but currently meat procession is stopped, as the price of sausage was quite high and the business operator was not able to penetrate market. Regarding waste management, solid waste is taken by municipal transport, liquid waste goes to septic tanks. For September the slaughterhouse has to fulfill all recommendations issued by NFA, otherwise it will be closed down. The main constraint is lack of finances, therefore the owner is not able to hire FS&H consultant to implement HACCP, purchase ref vehicle, carcass saw and renew the building, so it is under risk of closure.
KI 12	Tengiz Khotcholava – owner of I.E. Tengiz Khotcholava Chela, 599 24 91 91	June 2017	Slaughterhouse	Senaki, Samegrelo: has been functioning since 2014 and employs 5 men. The slaughterhouse works on service model and slaughters 4-5 cows per day. Slaughter price varies from 15 to 35 GEL. Main clients of the slaughterhouse are meat sellers from Senaki and Batumi Agri Market. The

				slaughterhouse has a ref vehicle for meat distribution. According to the owner main constraint of the slaughterhouse is weak control of slaughterhouses and Agri Markets, that enable other, FS&H not complying slaughterhouses functioning, beside this number of live animal decreased in the region and the slaughterhouse cannot participate in tenders or conclude contracts with big supermarkets, restaurants as it will not be able to ensure regular supply of meat. The slaughterhouse is equipped with carcass saw, stainless table, sterilizer etc. HACCP is established by SDC group. 2 months ago the slaughterhouse received recognition from NFA and during the last visit one recommendation was issued according to which the slaughterhouse has to purchase a kercher.
KI 13	Gocha Togonidze – owner of Togo Ltd, 593948980	June 2017	Slaughterhouse	Meskheti village, Imereti: has been operating since 2015. It employs 2 women and 5 men of full time jobs. The slaughterhouse mainly works via direct sourcing model and slaughters calves. Current throughput is 250 calves per month (8.3/day). The slaughterhouse also slaughters cows. However, rarely and mainly provide a service to local butchers. Meat is sold mainly in Batumi and Kutaisi HoReCa sector as well in Anaklia in Summertime and Bakuriani in wintertime. As Mr. Togonidze says the demand and supply is stable (slight decrease in Oct-Nov). The slaughterhouse also slaughters pigs. According to the director HACCP is already implemented. NFA is regularly visiting the enterprise. Recently, it was fined (did not have the analyses on the water). Regarding waste management, the slaughterhouse has a tank where the solid water is collected and taken out after filling by local municipal transport. The slaughterhouse is equipped by carcass saw and has 1 refrigerator vehicle. It plans to expand the business and begin packaging of meat. Currently, the slaughterhouse is also planning to renovate the building to expand processing of pork meat. The director is looking for financial resources to purchase equipment for processing pork meat and additional refrigerator car, as the business couldn't meet with the demand on the market which hampers the business to grow. The client has a loan in Finca bank. The director emphasized the influence of massive purchase of calves by Azerbaijan intermediaries on market price and its business as well.
KI 14	Lavrenti Sulakvelidze – owner of the Kutaturi Ltd, 593 990 989	June 2017	Slaughterhouse	Kutaisi, Imereti: Kutaturi has been functioning since 2011 and employs 4 women and 14 men. The slaughter house has gotten permanent license. Company owns its own farm and yet got 45 head of cattle, but they are planning to grow up to 100 head of cattle. The slaughterhouse works on wholesale meat distribution as well as serves different customers (butchers 30%, meat shops 10%, farmers 1%, SSLP's 59% etc). The slaughterhouse slaughters 40-45 head of cattle per day, out of which 2-3 are calf and 6-7 are pig. Slaughter price varies from 10 to 30 GEL for cattle and 20-40 for pig. Main clients of the slaughterhouse are meat sellers from Kutaisi, Tbilisi and Batumi Agri Market. The slaughterhouse has two ref vehicle for meat distribution. According to the owner main constraint of the slaughterhouse is weak control of slaughterhouses and Agri Markets, that enable other, FS&H not complying slaughterhouses functioning, beside this number of live animal decreased in the region, as well as backyard slaughtering and access to finance. The slaughterhouse is equipped with carcass saw, stainless table, sterilizer etc. HACCP is established and

				slaughter house is designed according to FS&H standards. Regarding the waste management, slaughterhouse has septic and bio thermic tanks. 6 months ago the slaughterhouse received recognition from NFA and during the last visit one recommendation was issued according to which the slaughterhouse has to purchase a uniforms for workers.
KI 15	Emzar Kurashvili– owner of the Gurama Ltd, 599 550 253	June 2017	Slaughterhouse	Khoni, Imereti: Gurama Ltd has been functioning since 2013 and employs 3 women and 4 men. The slaughter house has gotten permanent license 4 month ago. Company own its own farm and yet got 30 head of cattle. The slaughterhouse works on wholesale meat distribution as well as serves different customers from Imereti, Kvemo Kartli and Samegrelo region as well. (butchers 70%, SSLP's 30% etc). The slaughterhouse slaughters 5-6 head of cattle per day. Slaughter price varies from 20 to 30 GEL for cattle and 25-30 for pig. Main clients of the slaughterhouse are meat sellers from Khoni, Kutaisi and Batumi as well as kinder garden in Khoni municipality. The slaughterhouse has two ref vehicle for meat distribution. According to the owner main constraint of the slaughterhouse is weak control of slaughterhouses and Agri Markets, that enable other, FS&H not complying slaughterhouses functioning, beside this number of live animal decreased in the region, as well as backyard slaughtering. The slaughterhouse is equipped with carcass saw, stainless table, sterilizer etc. HACCP is established and slaughter house is designed according to FS&H standards. Regarding the waste management, slaughterhouse has septic and bio thermic tanks. Main constraint of the slaughterhouse is lack of finances that hampers to purchase proper carcass saw and renew the slaughterhouse. For the future the business operator plans to enlarge meat processing room. 4 months ago the slaughterhouse received recognition from NFA and during the last visit tree recommendation was issued according to which the slaughterhouse has to renovate refrigerators doors, construction of wall and renovate of wall.
KI 16	Darejan Vashakmadze– owner of the Bochola Ltd, 599 964 983	June 2017	Slaughterhouse	Vani, Imereti: Bochola Ltd has been functioning since 2011 and employs 3 women and 2 men. The slaughter house has gotten temporary license. The company has no its own farm and provides only slaughtering services to 12 butchers, 4 farms and little amount of SSLP's. Slaughtering services varies from 20 to 25 Gel per service. The company rents refrigerator car for meat distribution. Nowadays slaughterhouse slaughters 3-7 head of cattle a day. Main clients of slaughterhouse are meat traders from Vani and Kutaisi agri market. HACCP was established by SDC group company. Regarding the waste management, slaughterhouse has septic and bio thermic tanks. Main constraint of the slaughterhouse is lack of finances that hampers to purchase proper carcass saw and renew the slaughterhouse. For the future the business operator plans to enlarge meat processing room. 1 month ago the slaughterhouse visited by NFA and 1 recommendation was issued according to which the slaughterhouse has to roof disobedient.

<p>KI 17</p>	<p>Gia Kadzhaia– owner of I.E. Gia Kadzhaia 551 599 955</p>	<p>June 2017</p>	<p>Slaughterhouse</p>	<p>Martvili, Samegrelo: Slaughterhouse has been functioning since 2012 and employs 1 woman and 4 men. The slaughterhouse has gotten temporary license till the end of 2017. The company has no its own farm and provides only slaughtering services to butchers and SSLP’s. Slaughtering services varies from 10 to 25 Gel per service. The slaughterhouse has one ref vehicle for meat distribution. Nowadays slaughterhouse slaughters 5-9 head of cattle a day. Main clients of slaughterhouse are meat traders from Samegrelo, Batumi and Tbilisi agro market. The company serves about 20 butchers and 300 farmers permanently. HACCP was established, but not yet certified due to financial arrears. Regarding waste management system, solid waste is taken by municipal transport. Slaughterhouse has septic and bio thermic tanks. Main constraint of the slaughterhouse is lack of finances. 4 months ago the slaughterhouse visited by NFA and 1 recommendation was issued according to which the slaughterhouse has to buy cart for meat movement.</p>
<p>KI 18</p>	<p>Giorgi Mindilia – owner of I.E. Kote Kotia, 599 980 044</p>	<p>June 2017</p>	<p>Slaughterhouse</p>	<p>Bandza, Martvili: has been functioning since 2013 and employs 6 men on full-time jobs. 3-4 cows are slaughtered per day. Price of slaughtering varies from 15 to 22 GEL. The slaughterhouse works on service model and its main clients are approximately 15butchers and 25 SSLPs as well as meat sellers from Kutaisi, Batumi, Martvili and Tbilisi Agri markets. The slaughterhouse has one ref vehicle for meat distribution. According to the owner main constraint of the slaughterhouse is weak control of slaughterhouses and Agri Markets, that enable other, FS&H not complying slaughterhouses functioning, beside this number of live animal decreased in the region, as well as backyard slaughtering and access to finance. The slaughterhouse is equipped with carcass saw, stainless table, sterilizer etc. HACCP is established and slaughter house is designed according to FS&H standards. Regarding waste management, solid waste is taken by municipal transport, liquid waste goes to septic tanks. 5 months ago the slaughterhouse received temporary recognition from NFA and during the last visit three recommendation was issued according to which the slaughterhouse has to covering asphalt outside, arranging quarantine zone and arrange of drawings.</p>

KI 19	Beka kalandadze – owner of Bakara Ltd, 595 730 002	June 2017	Slaughterhouse	<p>Khelvachauri, Ajara: Bakara Ltd functioning since January 2017, and permanent recognition from NFA got 2 months ago. Slaughterhouse has its own farm and cattle mainly are imported from Ukraine. Nowadays 56 head of cattle are represented in the farm. Slaughterhouse owns 5 cars for cattle and 3 ref car for meat distribution. The company isn't oriented slaughtering service for SSLP's, but if demand for such services increase they are happy to serve. Main purpose of the company is to export meat (Sheep and Cattle) in Iran. Company produces Hallal meat for Muslim Countries Market. Price Per service is 50 GEL. The company has equipment for meat processing, and they plan to produce Basturma, Qaurma, Khashi and other meat products. Main supplier of cattle are big farms from Kvemo Kartli and Kakheti. The company has obligation of buying 20% of cattle in Ajara. Today 25 employees are working out of which 3 are women and 22 men. The company serve 10 tones of meat monthly and are going to increase supply. HACCP is established in slaughterhouse by Turkish company. Company invested in their business 3 million GEL.</p>
KI 20	Ira Khojakadze, director-owner of Ekimbeki Ltd Zestafoni 593 208 121	June 2017	Slaughterhouse	<p>Zestafoni, Imereti: has been operating since Soviet times. It has been one of the biggest slaughterhouses in the region. The area of the enterprise is more than 3 000 sq. m. The building is recently renovated mainly via preferential loan. However, the interviewer didn't clarify the amount. 1 butcher (on the call) and 1 vet is employed on the slaughterhouse. The slaughterhouse meets the slaughterhouse meets all FS&H requirements and HACCP is established. The company hired Eka Burkadze as an expert. Despite these facts throughput of the slaughterhouse is extremely low, average 1 cow/day. According to the owner the reason is low level of control by NFA. As she claimed cattle is mainly slaughtered backyard by butchers or slaughtered in another slaughterhouse which does not meet with FS&H standards, however local NFA does not close it or even give a fine. According to her the slaughterhouse doesn't provide direct sourcing as they couldn't compete with butcher's. Also she underlined decreasing amount of cattle in the region and factor of intermediaries from eastern Georgia purchasing calves and cows from local population. The director/owner sees main constraints in weak monitoring and lowness in the sector and doesn't exclude the option of changing business profile or selling the enterprise.</p>
KI 21	Niko Beridze	September, 2017	Akhaltsikhe Agro food LLC, Slaughterhouse	<p>Akhaltsikhe Agro Food LLC Food producer / distributor factory established in 2012 has become operational since 2015. The company has been given ISO 22 000 certificate confirming strict observance of the food safety standards. The company's main activity is sheep slaughtering and the meat trade. The slaughterhouse exported more than 40 000 sheep from January to September 2017. Sheep is chosen by Iranian intermediaries and purchased under the name of Akhaltsikhe Agro Food LLC mainly in Samtskhe-Javakheti, Kvemo Kartli and Kakheti regions of Georgia (paying Gel 155.00-160.00 on average for each live sheep). After slaughtering Akhaltsikhe agro Food sells mutton to Iranian intermediaries for Gel 12.50-13.00/kg on average. The frozen carcasses of sheep are then delivered to Iran and Kuwait again by the Iranian intermediaries with refrigerated trucks sent from Iran. Akhaltsikhe Agro Food LLC exports mutton and separately fat</p>

				tail of a sheep with small quantities to Azerbaijan but infrequently.
KI 22	Tristan Tsikhelashvili	September, 2017	Meskhethi Products Ltd, slaughterhouse	<p>Meskhethi Products Ltd, an abattoir and a meat products manufacturer and trader company has been operating since 2004.</p> <p>Slaughtering of the livestock, sheep and pigs is the main activity of the company along with the production of meat products with small quantities. The company has been given the HACCP certification in the beginning of 2017 although since then it continued functioning as an abattoir only. The main reason behind this switch seems to be that the Meskhethi products couldn't compete with other meat products manufacturers which use the frozen meat. Currently it slaughters 15 cattle, 5 calves and 40 pigs a day. It also provides slaughtering services of sheep max 100 heads/a day but infrequently. The slaughterhouse has its well established livestock collection points 33 totally throughout the region which pre-purchase livestock from farmers on a commission basis. It supplies meat and pork mainly to supermarket chains like 5 branches of Smart in Tbilisi, 1 in Tskhneti and 1 in Gori and branches of Taglaura Restaurant in Tbilisi. Meskhethi products provides sheep slaughtering services up to 100 heads/day to Iranian intermediaries but rarely.</p>
KI 23	Kakhaber Tepnadze	September, 2017	Kusha 2011 LLC, Slaughterhouse	<p>Kusha 2011 LLC was established in 2014 as a mini slaughterhouse. It has been given HACCP Certification in 2016. Currently it slaughters up to 3 cattle/a day and supplies meat to the meat shops located in Ahaltsikhe Town. Kusha 2011 won the tender in 2016 and since then it supplies meat to the kindergartens of the region. The company plans meat products manufacturing and trade shortly and currently it is in the process of expanding the size of the enterprise and setting up the technological line.</p>
KI 24	Otar Tedoradze	September, 2017	Irqa LTD, Slaughterhouse	<p>Irqa LTD constructed a slaughterhouse at the territory of Akhaltsikhe Agri Market in 2015 which became operational in 2016. The slaughterhouse applied HACCP compliance the same year in 2016. Currently slaughters up to 10 cattle/a day. It supplies all the meat selling points located in the agro market territory of Akhaltsikhe town. Apart from the slaughtering services the slaughterhouse processes the guts as the demand on the washed guts from the meat processing companies countrywide is very high. Other by-products are delivered to the cattle feed processing companies and the leather - to the Rustavi based leather factory.</p>
KI 25	Kesalo-2015 Ltd Director 598 14 08 25 Iagub Pirievi	September 2017	Slaughterhouse	<p>Gardabani, Kesalo village – The slaughterhouse provides slaughtering service in Gardabani municipality (Nazarlo, Kesalo villages). Slaughterhouse is slaughtering about 320-350 cows per month. The cost of one service is 40 Gel. The slaughtered cows and processed meat is sold in Rustavi and Tbilisi Agrarian Market through intermediaries.</p>
KI 26	Kharebi Ltd Director 577 47 98 48 Valeri Kakauridze	September 2017	Slaughterhouse	<p>Gardabani - The slaughterhouse provides cattle slaughtering service for farmers and meat shop owners from Nazarlo, Kesalo, Jandara, Kapanakhchi, Lemshveniera, Vakhtangisi villages. Slaughterhouse is slaughtering about 300-350 cows per month. The cost of one service is 40 Gel. The slaughtered cows/processed meat is sold in Tbilisi based warehouse, which</p>

				is located in Agladze st. #32 in Tbilisi. and in Navtlugi agrarian market.
KI 27	Nisha Ltd Director 599 16 64 85 Vasil Orjonikidze	September 2017	Slaughterhouse	Gardabani, Gachiani village – The slaughterhouse provides only cattle slaughtering service for Gardabani municipality: Gachiani, Gamarjveba villages. It slaughters about 120 cattle (The cost of one service is 35 Gel) and 100 Sheep (The cost of service is 10 Gel) per month. The slaughterhouse has got the temporary recognition form August, 2017.
KI 28	Tatia Ltd Director 555 22 22 22 Zaur Mchedlishvili	September 2017	Slaughterhouse	Gardabani, Sartichala village - The slaughterhouse provides only the cattle slaughtering service for Sartichala village based farmers and meat shop owners, and provides slaughtering service about 25-30 cattle per month. The cost of one service is 40 Gel. The slaughtered cattle/processed meat is sold in Sartichala meat shops.
KI 29	Shula Ltd Director 599 55 17 32 Zaza Chokhoniidze	September 2017	Slaughterhouse	Marneuli, Shulaveri village - The slaughterhouse provides cattle slaughtering services for Shulaveri Village based meat shop owners. It is slaughtering about 100 cattle per month. The cost of one service is 50 Gel, which includes delivery of meat o meat shop. The processed meat is sold in local meat shops based in Shulaveri village. The leather, processed in brine by the meat processor is sold in 1.70 Gel/kg to the private company, which is collecting and exporting cattle leather to Turkey.
KI 30	I.E Khaial Karimovi Director 595 72 66 13 Khaial Karimovi	September 2017	Slaughterhouse	Gardabani, Algeti village - The slaughterhouse provides only the cattle slaughtering service for Gardabani municipality villages: Nazarlo, Keshalo, Kesalo, Algeti. It is slaughtering about 90 cattle per month. The cost of one service is 40 Gel. The processed meat is sold in the local meat shops.
KI 31	Alali – 2015 Ltd Director 595 60 60 30 Levan Khakhulashvili	September 2017	Slaughterhouse	Marneuli - The slaughterhouse provides cattle and sheep slaughtering service for Marneuli, Tetrtskaro and Bolnisi municipality farmers and meat shop owners. Also the slaughterhouse is exporting sheep and live cattle to Iraq and Iran. On average the slaughterhouse is exporting 8 000 – 10 000 sheep monthly to Iran, and 800 live bulls to Iraq, Kurdistan and Azerbaijan. Mainly the slaughterhouse is collecting sheep and bulls in villages and regions of Georgia through intermediaries. The cost of the cattle slaughtering service is 30-40 Gel for cattle and 15 Gel for sheep. The cattle processed meat is sold in Agladze street based, Tbilisi, warehouse.
KI 32	Vaziani LTD Director 599 56 00 85 Ivane Kharatishvili	September 2017	Slaughterhouse	Gardabani – The slaughterhouse provides cattle slaughtering services for farmers lived in Teleti, Tetrtskaro, Kumisi villages. The cost of one service is 35 Gel. Slaughterhouse is slaughtering about 300- 360 cattle per month. The processed meat is sold in local meat shops in Gardabani and Tbilisi agrarian market. The leather, processed in brine by the meat processor is sold in 1 Gel/kg, sometimes 0.80 Gel to the private company, which is collecting and exporting Leather of cattle to Turkey.
KI 33	Kavshiri Ramazani Veterinary 593 62 61 03	September 2017	Slaughterhouse	Gardabani – The slaughterhouse provided just service for farmers lived in Nazarlo, Kesalo villages. The cost of service is 40 Gel for cattle and 10 Gel for sheep. They are slaughtering about 370 - 600 heads of cattle and 150 heads of sheep per month. The processed meat local farmers are selling in the

	Iashar Pashaevi			local meat shops and in Tbilisi agrarian market. They have got temporary recognition from NFA.
KI 34	I.E Zurab Somkhishvili Director 599 31 01 31	September 2017	Slaughterhouse	Tetrtskaro - The slaughterhouse provides cattle slaughtering services for farmers living in Kakheti, Samtskhe-Javakheti regions and Tsalka municipality. It is slaughtering about 150 - 300 cattle monthly. The cost of one service is 30 Gel. The processed meat is sold in Tbilisi meat shops and agrarian markets. The slaughterhouse has temporary recognition from NFA.
KI 35	Tskhovelta Sasaklao Saamqro Ltd Director 599 60 04 34 Zviad Sukhitashvili	September 2017	Slaughterhouse	Tetrtskaro - The slaughterhouse provides cattle slaughtering services for farmers (about 100 heads of cattle monthly) living in Kvemo Kartli regions and sometimes slaughtering own (about 120 – 180 heads of cattle) cattle. The cost of one service is 50 Gel per cow. The processed meat is sold in agrarian markets and in the warehouse, which is located in Agladze st. #32 in Tbilisi. Slaughterhouse has got temporary recognition from NFA. In the future, the meat processor plans to export sheep to Arab countries, currently the company is in negotiation with Arabian intermediaries and buyers.
KI 36	Iber Meat Georgia Ltd Technical Director 597 00 90 02 Irakli Adeishvili	September 2017	Slaughterhouse	Natakhtari – The slaughterhouse is doing export of slaughtered sheep to Iran, Iraq and Kuwait. It is slaughtering about 12 000-15 000 sheep monthly. Slaughterhouse has got temporary recognition from NFA since March, 2016. The cost of the processed leather is 0.50 Gel of one piece. The collected leather is sent to Turkey.
KI 37	Gio 2001 Ltd Director 555 59 03 99 Mikheil Beridze	September 2017	Slaughterhouse	Keda municipality, Kokotauri village - The slaughterhouse provides only cattle slaughtering service for farmers living in Shuakhevi, Keda, Khulo villages of Ajara region. The cost of one service is 20-35 Gel, which depends on weight of the cattle. Slaughterhouse has got temporary recognition from NFA since May, 2017. It slaughters about 60-70 heads of cattle monthly. The processed meat is sold in Batumi meat shops and agrarian market. The processed leather is exported to Turkey by the private company, which pays to processor 1.50 Gel per kg.
KI 38	Ori Gio Ltd Director 577 20 58 00 Temuri Beridze	September 2017	Slaughterhouse	Keda municipality, Kokotauri village - The slaughterhouse provides only cattle slaughtering service for farmers living in Gorjomi, Agara, Satsikhuri, Didajara communities. The cost of one service is 0.40 Gel per kg/cattle, from which 80% is paid by municipality of Khulo and 20% by farmer, it is funded by Livestock Support Program. Slaughterhouse has got temporary recognition from NFA since June, 2017. It slaughters about 200 heads of cattle monthly. It participated in the tender to supply processed meat to kindergartens in Keda, Khulo and Shuakhevi villages. The processed meat is sold in Batumi meat shops and agrarian market. The processed leather is exported to Turkey by the private company, which pays 0.80 Gel, sometimes 1 Gel per kg.
KI 39	Matador Ltd Ioseb Kokhtashvili 558306796	September 2017	Slaughterhouse	Sagarejo, Kakheti – The slaughterhouse has been operating since 2011. It provides cattle and pig slaughtering service, 55 Gel per service, 30 services per month. Slaughterhouse is serving Sagarejo municipality villages and meat shop owners located there.

KI 40	Nika Ltd	September, 2017	Slaughterhouse	Tsnori, Kakheti – The slaughterhouse has been in operation since 2012. Currently it provides 150 slaughtering services of cattle and pigs per month, service fee 30-35 Gel. Slaughterhouse is serving Tsnori and Bodbiskhevi villages, 5 meat shops in total. The leather is sold to Turkish company Starleather Ltd (შპს სტარლეათი), 1.6 Gel per kg.
KI 41	Mitera Ltd 577533022	September, 2017	Slaughterhouse	Sagarejo, Kakheti – The slaughterhouse has been in operation since 2005. Currently it is slaughtering 800 sheep per month (12 tons of processed meat), which is going on export to UAE. Slaughterhouse is working only for export.
KI 42	Sandro Megutnishvili Qartuli Xorcis Produqtebi Ltd 595364114	September, 2017	Slaughterhouse	Karajala, Kakheti - The slaughterhouse has been in operation since 2008. Currently it is slaughtering 1200-1300 sheep in Halal rule monthly, the processed sheep is sold in Agrohub in Tbilisi, Carrefoure, also it is sold to intermediary from Telavi. The mullah is attending the slaughtering process to certify the slaughtering of sheep in Halal Rule. Sheep is collected and provided by Azeri intermediaries.
KI 43	Vasil Sesitashvili	September, 2017	Slaughterhouse	Vardisubani, Telavi, Kakheti - The slaughterhouse has been in operation since 2012. Currently it is slaughtering 300 sheep monthly, service fee is 20 Gel per service. Sheep is sold to agrarian market Tbilisi, Gurjaani, the leather is sold to Turkish company, 1.60-1.70 Gel/kg
KI 44	IE Petre Kakonashvili	September, 2017	Slaughterhouse	Vardisubani, Telavi, Kakheti - The slaughterhouse has been in operation since 2013. Currently it is slaughtering 150 pigs monthly, service fee is 10 Gel per service. Slaughtered pigs are sold to Telavi based agrarian market, small meat shops as well.
KI 45	IE Natia Gogoberidze 599804127	September, 2017	Slaughterhouse	Khashuri, Shida Kartli - The slaughterhouse has been in operation since 2013. It has recognition from NFA. Currently it is slaughtering 150 cows monthly, service fee is 20 Gel per service. Slaughtered cattle is sold to Khashuri agrarian market and small meat shops. the leather is sold to Turkish company, 1.50 Gel/kg
KI 46	Khorts kombinati Ltd 599765464 Repr: Gela Gelashvili	September, 2017	Slaughterhouse	Khashuri, Shida Kartli - The slaughterhouse has been in operation since 2016. It has recognition from NFA. Currently it is slaughtering 200-300 cows monthly, service fee is 25 Gel per service. Slaughtered cattle is sold to Khashuri agrarian market and small meat shops in Khashuri and Tbilisi. the leather is sold to Turkish company, 1.30 Gel/kg
KI 47	IE Akhmed Niazovi 599583382	September, 2017	Slaughterhouse	Karajala, Kakheti - The slaughterhouse has been in operation since 2014. Currently it is slaughtering 300-500 cattle monthly, service fee is 40 Gel per service. Slaughtered cattle is sold to Telavi and Akhmeta agrarian markets. the leather is sold to Turkish company, 1.50-1.60 Gel/kg, he owns a 40 cows farm and now constructing the building for farm. He has recently slaughtered 1200 sheep in Marneuli based slaughterhouse Alali-2015.

KI 48	IE Etram Alazovi 592933696	September, 2017	Slaughterhouse	Iormughanlo, Kakheti - The slaughterhouse, which is currently slaughtering 100 cattle monthly, service fee was 30 Gel per service and 100 sheep monthly from its own farm, also providing sheep slaughtering service, cost is 10 GEL. Sheep and cattle has been collected from villages of Sagarejo, Gurjaani. The meat is sold in Tbilisi, Agmashenebeli avenue meat shop and in Samgori agrarian market and meat shop.
KI 49	Pazisi Ltd	Sep, 2017	Slaughterhouse	Tbilisi. The Slaughterhouse has been established in 2016, Provides cattle slaughtering services for farmers living in Semgrello, Kvemo Kartli, Kakheti. Service fee - 25 GEL/cow. It is slaughters 300-350 cows per month and has recognition from NFA. The hides are sold in 1.5 Gel/kg to intermediary company.
KI 50	Tsikhisdiri-2014 Ltd	Sep.2017	Slaughterhouse	Kaspi. Tsikhisdziri village, The Slaughterhouse has been in operation since 2014, Provides cattle slaughtering services for farmers. Service fee – 30-35 GEL/cow. It is slaughters 400-500 cows per month and has recognition from NFA. The hides are sold in 1.5 Gel/kg to company in Tbilisi.
KI 51	Zei Ltd Emzar Zariashvili 598 19 10 00	Sep, 2017	Slaughterhouse	Mukhrani village, Mtskheta-Mtianeti, The Slaughterhouse has been in operation since 2014, Collects 200 cattle and slaughters and sells meat in Mukhrani village based meat shops, and Supermarket Ekonomix in Tbilisi. Service fee – 30 GEL/cow. It is slaughters 400-500 cows per month and has recognition from NFA. The hides are sold in 2 Gel/kg to company in Tbilisi.
KI 52	IE Nizaaam Sharipov 599 26 27 68	Sep, 2017	Slaughterhouse	Akhtala village, Kaspi, The Slaughterhouse has been in operation since 2016, Collects and slaughters cattle and sells in Tbilisi based meat storage on Agladze street and Kaspi meat shops. Slaughters 120 cattle/day. Service fee – 25 GEL/cow. Hides are sold by 1.6Gel to Tbilisi based company
KI 53	Kotsakhura Ltd Tamaz Niparishvili 599105595	Sep, 2017	Slaughterhouse	Kaspi, The Slaughterhouse has been in operation since 2014, Provides cattle slaughtering services, 70-80 per month. Mainly customers are farmers and meat shop owners from Kaspi. Slaughtering fee 30 Gel.
KI 54	Perma Ltd Tamaz Mustafa Ogli 599 504 507	Sep, 2017	Slaughterhouse	Perma village, Kaspi, The Slaughterhouse has been in operation since 2014, Provides cattle slaughtering services, 100-150 per month. Mainly customers are farmers and meat shop owners from Kaspi. Slaughtering fee 30 Gel. Also collects cattle in nearby villages and slaughters and sells in meat shops located in Kaspi.
KI 55	IE Nika Meqerishvili			Gurjaani, The Slaughterhouse has been in operation since 2016, Provides cattle slaughtering services, 100-150 per month. As well as collects, slaughters and sells cattle in Gurjaani agri market. Service. Mainly customers are farmers and meat shop owners from Kaspi. Slaughtering fee 30 Gel.
KI 56	Gvinia Ltd Zurab Abramishvili 599154761	Sep, 2017	Slaughterhouse	Apeni village, Lagodekhi. The Slaughterhouse has been in operation since 2014, Provides cattle slaughtering services, also collects, slaughters cattle 180 monthly and sells meat in restaurants and Agrarian Market. Slaughtering fee 30 Gel.

KI 57	IE Mamuka Lukava 599217838	Sep, 2017	Slaughterhouse	Akhalkakhati village, Zugdidi , The Slaughterhouse has been in operation since 2014, Provides cattle slaughtering services, about 150-200 services monthly. Mainly customers are meat shop owners and farmers. Slaughtering fee 20-25 Gel.
KI 58	Agromeat Ltd Lali Gogokhia 599 597 087138	Sep, 2017	Slaughterhouse	Zugdidi , The Slaughterhouse has been in operation since 2014, Provides cattle slaughtering services, about 90 services monthly. Mainly customers are meat shop owners and farmers. Slaughtering fee 25 Gel.
KI 59	Angeli Ltd Elnr Jabbarli 557 95 00 03	Sep, 2017	Slaughterhouse	Teleti village, Gardabani , The Slaughterhouse provides sheep slaughtering and export sheep to Kuwait, Iran, Qatar,
KI 60	IE Manana Gugava 599 93 84 69 Davit Mepariani	Sep, 2017	Slaughterhouse	Tsiperchi village, Tsageri , The Slaughterhouse has been in operation since 2015, Provides cattle slaughtering services, about 90 services monthly. Mainly customers are local meat shop owners. Slaughtering fee 40 Gel.
KI 61	Veliani Ltd Zviad Gagnidze 555 52 44 05	Sep, 2017	Slaughterhouse	Kindzati village, Khashuri , Slaughterhouse has been in operation since 2008. It has recognition from NFA. Provides cattle slaughtering services, about 200 cattle is slaughtered monthly. Mainly customers are local meat shop owners. Slaughtering fee 30 Gel. Also collects cattle, slaughters and sells in Tbilisi agri markets and local meat shops.
KI 62	Aisi 2005 Ltd Natia Gogoberidze 599 801427	Oct, 2017	Slaughterhouse	Osiauri village, Khashuri, Shida Kartli . Slaughterhouse has been in operation since 2013. It has recognition from NFA. Provides cattle and sheep slaughtering services, about 150 cattle and sheep monthly. Mainly customers are local meat shop owners. Slaughtering fee 30 Gel per cow, 20 Gel per sheep. Also collects cattle, slaughters and sells in Khashuri agri market.
KI 63	Halal Group Ltd Ana Kirvalidze 579 17 37 97	Oct, 2017	Slaughterhouse	Perma village, Kaspi, Shida Kartli . Slaughterhouse has been in operation since 2014. It has recognition from NFA. Provides cattle and sheep slaughtering services, about 600 cattle and 150-200 sheep monthly. Mainly they are collecting, slaughtering and selling in Tbilisi supermarkets and markets, such as Carrefoure, Slaughtering fee 35 Gel per cow, 13 Gel per sheep.
KI 64	Arazi Ltd Aluda Alievi 599 001338	Oct, 2017	Slaughterhouse	Perma village, Kaspi, Shida Kartli . Slaughterhouse has been in operation since 2010. It has recognition from NFA. Provides cattle slaughtering services, about 300-400 cattle monthly. Mainly they are collecting, slaughtering and selling in Tbilisi supermarket, such as Carrefoure, Slaughtering fee 35 Gel per cow for farmers.
KI 65	IE Givi Gelkhauri 551 215060	Oct, 2017	Slaughterhouse	Agaiani village, Kaspi, Shida Kartli . Slaughterhouse has been in operation since 2012. It has recognition from NFA. Provides cattle slaughtering services, also collecting cattle slaughtering and sells meat in local meat shops and markets. about 100-200 cattle monthly, Slaughtering fee 30 Gel per cow for farmers.

KI 66	IE Germonazashvili 599 518706 Zurab	Oct, 2017	Slaughterhouse	Barnabiantkari village, Kaspi, Shida Kartli. Slaughterhouse has opened recently. Provides only sheep and cattle slaughtering services. Service fees 10 Gel per sheep, 30 Gel per cow. Main clients are local meat shops. Slaughters 200 cows per month.
KI 67	Blauenshtein Georgia Ltd Rostom Kervalishvili, director 599 28 43 49	Oct, 2017	Slaughterhouse	Shardometi village, Oni, Racha region. It is slaughterhouse and cattle farm. Established since 2008. About 200 milking cows. 20-23 cows are slaughtered monthly, and the meat is sold in Tbilisi based meat shop.
KI 68	LT Ltd Bakar Torchinava 591 27 09 09	Oct, 2017	Slaughterhouse	Khobi, Samegrelo. Slaughterhouse has been in operation since 2014. Provides cattle slaughtering services for farmers and meat shop owners, also collects and slaughters cattle itself and sells in local meat shops. about 60-70 cows are slaughtered monthly. Slaughtering fee 30 Gel per cow. Hides are sold to private company in 1.3 Gel.
KI 69	Nusret Georgia Ltd Alika Zeinalovi 599 41 01 08	Oct, 2017	Slaughterhouse	Achkva village, Kobuleti, Ajara. Slaughterhouse has been in operation since 2011. Provides cattle slaughtering services for local farmers and meat shop owners from Kobuleti, also collects and slaughters cattle itself and sells in local meat shops. about 100 cows are slaughtered monthly. Slaughtering fee 30 Gel per cow.