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"Advantages of the Georgian apple sector compared to its competitors (Eastern Europe, Caucasus, Central Asia...)" (10 mn)





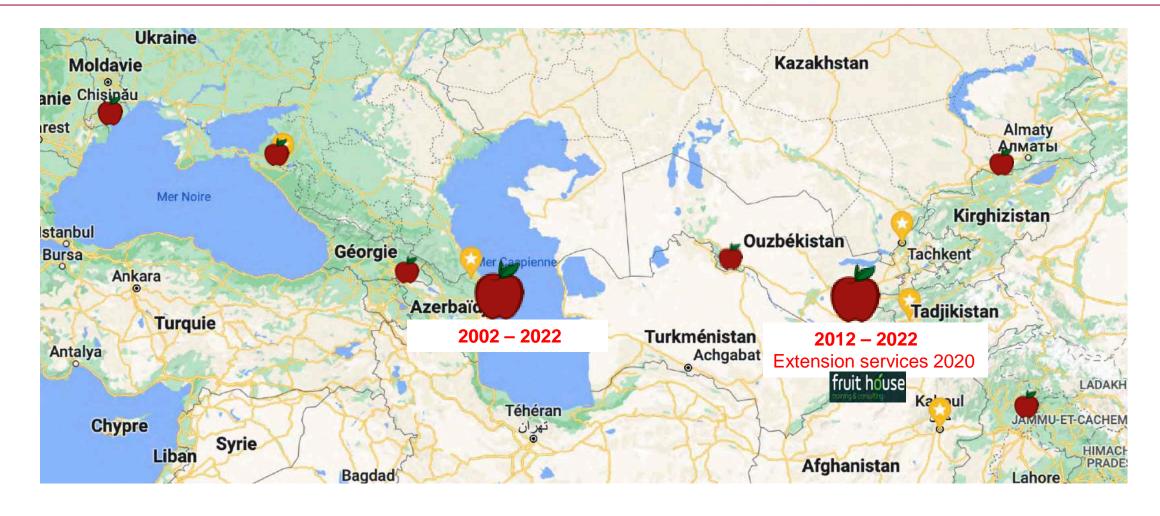


























Agronomic

| Criterias | Eastern Europe | Caucasus | | Central Asia |
|--------------------|--|---|-----------------------------------|---|
| | Moldavia | Georgia (Shida Kartli) | Azerbaijan (North East) | Uzbekistan (Tashkent) |
| Soil | +++ | ++(+) Land availability shortage | +++ | +++ |
| Climat | + Winter frost (< 20°C) Spring frost / Hail | ++ Hail Spring frost | +++ Heat wave | + Hot summer (> 40°C) Winter & spring frost |
| Water availability | ++(+) | ++ Summer shortage | ++(+) | ++(+) |
| Pests & Diseases | ++ Apple scab - fire blight | ++ Apple scab/ fire blight/soil fatigue | +++ | ++ Fire blight/Powder milew |















Key agronomic advantage of Georgia:

-Georgia is one of the best agronomic location for apple trees cultivation in this area of the World.

Recommendations:

Growers should develop the new apple varieties tolerant to scab and rootstocks adapted to soil fatigue.

-Secure the harvest with hail net protection and more water available (reservoir)











for a better future

CHAMBRES D'AGRICULTURE



Growers environment

German Excellence, Global Relevance,

| Criterias | Eastern Europe | Caucasus | | Central Asia |
|---------------------------------|--|--|---|---|
| | Moldavia | Georgia (Shida Kartli) | Azerbaijan (North East) | Uzbekistan (Tashkent) |
| Investment cost \$/Ha | ++ Hail net nurseries shortage | ++ Hail net nurseries shortage | ++(+) Land cost 11 k\$ Nurseries shortage | +(+) Hail/solar net Import taxes – Nurseries shortage. |
| Credit access & Subsidies | ++ | ++ | ++ | + (+) Difficult credit access |
| Work force Labors cost \$/Ho | +(+) 1,25 \$/Ho Labors shortage | +(+) 1,25 \$/Ho Labors shortage | ++(+) 1,25 \$/Ho | +++ < 1\$/Ho |
| Extension services | + | +(+) | + | + |
| Grower organization | + Weak | + Weak | + Weak | + Very weak |
| | of Finance & Management | CORPS | KIDIFIG | agricultures *Territoires |







Key advantage of Georgia:

- -A better credit access and significant subsidies on Capex.
- -The desire to develop extension services.
- -A better access to technologies & mechanization thank to Europe closeness.















Market

| Criterias | Eastern Europe | Caucasus | | Central Asia |
|--------------------|---------------------------|----------------------------------|-----------------------------------|---------------------------------|
| | Moldavia | Georgia (Shida Kartli) | Azerbaijan (North East) | Uzbekistan (Tashkent) |
| Market orientation | + Weak domestic market | + Weak domestic market | + Landlocked country | +(+) Landlocked country |
| Quality mark | + | + GAP | + Poor | + Poor |















Key market advantage of Georgia:

- -Direct access to black sea to export apples.
- -Closeness to Europe and Gulf countries.















Conclusion:

Apple sector is a competitive market, many countries surrounding Georgia have good agronomic conditions for growing apple trees (and are still developing).

-Georgian producers have to improve their competitiveness by: Extension service development and credit access.

Grower organization and marketing to reach sustainable market.















Thank you for your attention!









