SITUATION AND PROSPECTS OF THE APPLE VALUE-CHAIN IN GEORGIA
THINK AND ACT TOGETHER

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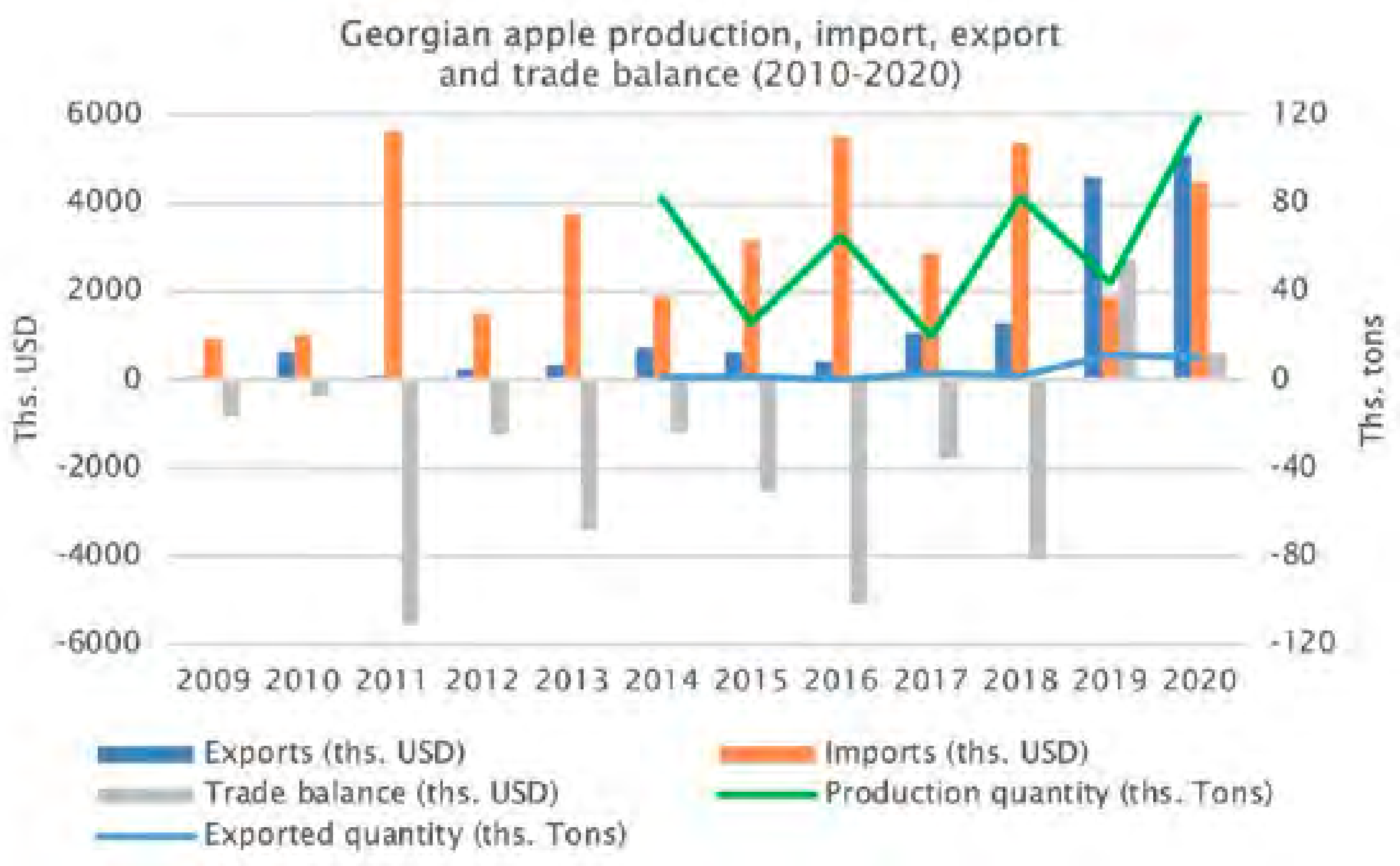
"FAO ENPARD and the apple sector in Georgia" (10 mn)

- Global apple production is still increasing but in a very small percentage
- In Georgia, the harvest of apple starts mainly in September and finishes by the end of October, if not considered small volume of early apple that starts to ripe by the end of June in Imereti and Kakheti regions and harvest continues until the end of August including other regions
- In previous years Georgia had been a net importer but slowly the trade balance has shifted, however there is still a big gap to fill. To fill some of this gap would require more cold storage (months of March to June), which may be unfeasible financially


Georgian apple production, import, export and trade balance (2010-2020)
6000
4000
2000
0
-2000
-4000
-6000
Ths. USD
120
80
40
0
-40
-80
-120
Ths. tons
2009 2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020
Exports (ths. USD)
Imports (ths. USD)
Trade balance (ths. USD)
Production quantity (ths. Tons)
Exported quantity (ths. Tons)

- In Georgia apple production is highly volatile. Yield volatility is caused by the climate conditions and vulnerability of the respective production technologies. Also, periodical fruit bearing and diseases (apple scab, apple mites, powdery mildew, etc.) negatively affect quality and volume of the crop.
- Traditional practices of pruning and lack of flower thining in some years are also reasons for unstable yields in consequent years.

- Georgia is far behind the EU member states or even neighbor countries in terms of apple yield per one ha
- Despite the positive trend of the recent years, in Shida Karli, the share of modern apple orchards (intensive, partially intensive, with irrigation system) is about 7%

- The EU's trade balance for apples has been positive over the past 10 years except for 2018. Both exports as well as imports show a slightly decreasing demand
- EU's demands on 1) Pesticide MRLs and 2) Market standards Regulation No. 543/2011 are challenging to meet
- Russia has remained the most important buyer and also the most unstable. It is one of the world's leading importers
- There is still room to substitute imports and to export to alternative markets, less demanding than EU

FAO’s Contributions through ENPARD

- Value chain assessment on Apples
- Evaluation of the Plant the Future Programme
- Manual on post harvest for Apples and pome fruits
- Training of extension services

FAO's Contributions through EUIPSC

- Supported elaborating the Policy on Propagation of Vegetative Material in Georgia, to develop a seedling certification system
- Strengthened SRCAs capacity to identify viruses through ELISA tests kits
- Trained apple producers on Integrated Management of Apple Orchard
- Imported Basic Material (virus and disease free) of 16 apple varieties for private sector nurseries for production of saplings

FAO’s Contributions through EUIPSC

- Imported Basic Material (virus and disease free) of 10 apple varieties for a national repository of virus and disease free and true to type plants

Thank you for your attention!