



ევროკავშირი  
საქართველოსთვის  
Project funded by the European Union

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



**Fabien Martel**

**Director, Eco Fruit Conseil**

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





ევროკავშირი  
საქართველოსთვის

Project funded by the European Union

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





# 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)



# Growers environment

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



## 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

Criteria	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.



ევროკავშირი  
საქართველოსთვის  
Project funded by the European Union

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



# Thank you for your attention!

