

Review of Georgia's Export Opportunity of Selected Products to Romania and Bulgaria

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1. SUMMARY

EU market presents ample of opportunities for agricultural exports from Georgia. As a signatory of Deep and Comprehensive Free Trade Agreement with the EU, Georgia's exports of selected products enjoy zero import tax, and only nectarines and raspberries are subject to minimum price requirement. In the condition of adequate marketing strategy including enhanced quality of production, improved post-harvest handling practices and transportation processes, there is an opportunity for Georgia to supply target markets competitively with selected products.

As a result of two stage exercise the following products were selected for feasibility study: (i) different types of berries, (ii) peaches and nectarines, (iii) different types of dried fruits, (iv) grape wine spirits, and (v) unfermented juices.

Georgia has not exported any of the selected products neither to Romania nor to Bulgaria. Georgia's export potential together to Romania and Bulgaria is in the range of EUR 0.5-0.6 million. Based on comparative review of Georgia's export and Romania's and Bulgaria's import unit prices, market availability of Georgian products, and monthly seasonal indexes of selected products, unfermented juices and wine grape spirits have the best prospects to be exported from Georgia to these EU member countries. Also, berries and nectarines and peaches, have potential to be supplied to Bulgaria and Romania. The least prospective export products are dried fruits excluding of dried apples. Overall, Georgia's export opportunities of selected products have been more notable to Romania compared to Bulgaria.

Wine grape spirits and unfermented juices have export potential to both Bulgaria and Romania throughout the year excluding juice exports in January. Nectarines could be exported to Bulgaria in September and to Romania in June and October, while peaches have export opportunity only in Romania during May-June and September. Strawberries and blackberries provide export opportunity both in Bulgaria and Romania in January, April and May, and in July, accordingly. Currants and gooseberries, and cranberries and blueberries could be exported to Romania during June-August and June-July periods, respectively. Bulgaria's market provides Georgia with export opportunity for dried apples during June-July period.

There are number of challenges and gaps in the production and processing stages of these products that require attendance. Addressing these issues

should likely improve competitiveness of Georgian products.

In the production of berries there is limited availability of plant protection products suitable for berry production. Input suppliers have been reluctant to register and import these products given the relatively small scale of the sector. Moreover, certain equipment and machinery has been missing having negative impact on the maintenance of berry quality and reduction of labor cost; these include mulching equipment, harvesters, and small scale refrigerated trucks. Quality packaging is entirely imported, and timely sourcing of packaging often has been obstacle encountered by producers and exporters. The last and not the least challenge has been limited knowledge and experience among growers to properly produce and handle berry harvest. Berry production is an emerging sector, and there is need for increased technical assistance to the growers in production and post-harvest handling practices.

Missing pre-cooling infrastructure at the cold storage facilities has been cross-cutting issue for both berries and nectarines/ peaches. In addition to the missing pre-cooling, peach/ nectarine post-harvest handling has been negatively affected by missing humidity control infrastructure at storage facilities. Moreover, sorting and grading lines have been missing in cold storage facilities located in peach/ nectarine growing regions; therefore, cold storage operators have stored fruits as delivered. All burden of sorting and grading in terms of finances and time has been born by exporters. Other challenges in peach/ nectarine sector are related to the variability in the quality of plant protection product, and grower production and farm business management skills; growers' limited knowledge in application of measures against pests and diseases, resulting in high expenditures and overuse of chemicals, which negatively impacts fruit quality.

For dried fruit producers/ exporters major challenges include high costs of raw materials and incomplete processing lines leading to very high outlays on labor. There is an opportunity to reduce production costs by third if proper processing lines are installed at the enterprises.

Wineries mainly contract out distilleries' services for grape spirit production, since only one or two wineries have run own distillation. Major problem with this set-up has been outdated distillation equipment and a limited adherence to food safety norms among distilleries. Some of the established wineries plan to diversify and develop own distillation capacities. Another challenge has been limited awareness about

Georgian grape spirits in export markets; therefore, wineries market grape spirits as part of the wine package.

In juice production, the biggest challenge has been high prices on local raw materials and availability in terms of volume and time. Relatively better situation has been in the processing of those fruits for which commercial orchards exist; these include apples and mandarins.

As mentioned above, despite of all reviewed challenges, with proper policy/ support measures Georgian products can enhance export competitiveness.

2. METHODOLOGY

The products for export feasibility analysis were selected through the two stage selection process. The first stage included assessment of export potential of different agricultural products; it was based on two indicators including export potential indicator (EPI) and product diversification indicator (PDI). EPI identifies products in which exporting country has already proven to be internationally competitive and which have good prospects of export success in new or existing target markets. PDI identifies products, which are not exported competitively by the exporting country, but which seem feasible based on the country's current export basket and the export basket of similar countries. After the identification of the range of products, meetings were organized with stakeholders representing public, NGO, and private sectors. Based on the consultations additional criteria was applied to narrow down selected products. This criteria included market size, market growth, relative position, ability to differentiate from international competitors, production level, number of households involved in the production, existence of lead organizations/ producers, female participation extent in the supply chain, and environmental sustainability.

The study utilized both secondary and primary data. Secondary data included information on production, trade and border taxes. The sources of information were International Trade Center (ITC), EU Export Help Desk, National Statistics Office of Georgia (NSO), and the Ministry of Environmental Protection and Agriculture of Georgia (MEPA). Primary data included information about production of certain analyzed products for which there is no information at formal

statistical sources, and production and market characteristics of analyzed products; the sources of information of primary data were experts and practitioners including producers, processors, and exporters, and the resources from the Center for Promotion of Imports from Development Countries (CBI). The Study applied statistical tools to analyze trade data (mean, volatility), and estimated compound annual growth rates for trade indicators.

3. PRODUCTION, AVAILABLE SERVICES, AND SHORTCOMINGS

3.1. BERRIES

PRODUCTION AND MARKET AVAILABILITY

Blueberry

Nationwide output of blueberries in Georgia is around 500-600 tons. About 70% of production is concentrated among large growers farming on 2-30 ha area of land; the other 30% of production comes from small growers producing, on average, on 0.2-2 ha area land. Production cost is about 3.5-4 GEL/kg. Outlays on labor, plant protection products, and fertilizers represent about 60%, 15-20%, and 10% of total production cost, accordingly.

On average, blueberry yield is 4-5 tons/ha, whereas the potential yield level is around 12 ton/ha. Blueberries are supplied to the market from the end of May through the end of July; the peak of market availability is June. Farm gate prices have been 8 GEL/kg.

About 80% of the harvest is exported, and 20% is supplied to the local market. Blueberries under proper conditions could be stored up to 15 days.¹

Raspberry

Average annual output of raspberries has been 300 tons. About 20% of total output originates from large scale operations, farming on about 2-20 ha area of land; the remaining 80% of production comes from small growers producing on 0.1-2 ha area of land.

Raspberry production cost is approximately 3 GEL/kg. Expenditures on labor, plant protection products, and fertilizers represent about 60%, 15-20%, and 10% of total production cost, accordingly.

¹ Interview with berry expert, producer and an exporter

Raspberry is available at the market in June and during October-November. Nearly 70% of total output is harvested in June, and the remaining 30% - during October-November. Raspberry actual yield level is about 4-5 tons/ha, while the potential yield is 14-15 tons/ha. Raspberry farm gate price during the first harvest is in the range of 3.5-4 GEL/kg, and during the second harvest - almost 6.5 GEL/kg. Around 70% of total raspberry harvest is supplied to the open markets, 25% - to the small retail shops, and 5% - to the confectionary sector. Raspberries under proper conditions could be stored for 4-5 days.²

Blackberry

Blackberry total annual output has been 200 tons. Around 20% of total harvest comes from large operations, i.e. 2-20 ha area of land, and the remaining 80% of production comes from small farms - 0.1-2 ha area of land.

Production cost is about 2.5 GEL/kg; Expenditures on labor, plant protection products, and fertilizers represent nearly 60%, 15-20%, and 10% of total production cost, respectively.

Blackberry actual yield level is close to 10 tons/ha, and the potential per hectare productivity is 15 tons/ha. Blackberry is supplied to the market during July-August. Mid-July through mid-August period is considered as the peak of supplies. Blackberry farm gate prices have been 3-3.2 GEL/kg. Blackberry export prices are approximately 4-4.5 GEL/kg. About 70% of blackberry harvest is supplied to the open markets, 25% to the retail shops, and 5% to the confectionary sector. Blackberries under proper conditions could be stored for 8-10 days.³

Strawberry

Total strawberry annual output has been 8-10 thousand tons. Production is mostly concentrated among small scale growers farming on 0.1-1 ha area of land. There are few large growers producing strawberries on 1-3 ha area of land.

Production cost is about 1 GEL/kg; Outlays on labor represent about 70% of total production cost, and those on pesticides and fertilizers 15-20% and 10%, accordingly.

Strawberry is available at the market from the end of April through June, and during September-November.

² Interview with berry expert, producer and an exporter

³ Interview with berry expert, producer and an exporter

⁴ Interview with berry expert, producer and an exporter

Average yield of strawberries is about 8 tons, while potential output level per hectare is 25 tons. About 95% of total output is harvested during April-June. Peak of supplies is mid-May. Strawberry farm gate prices during the first harvest is about 3 GEL/kg, and during the second harvest - 5 GEL/kg. Approximately, 70% of the harvest is supplied to the open markets, 25% to retail shops, and 5% to the confectionary sector. Strawberries under proper conditions could be stored for 3-8 days.⁴

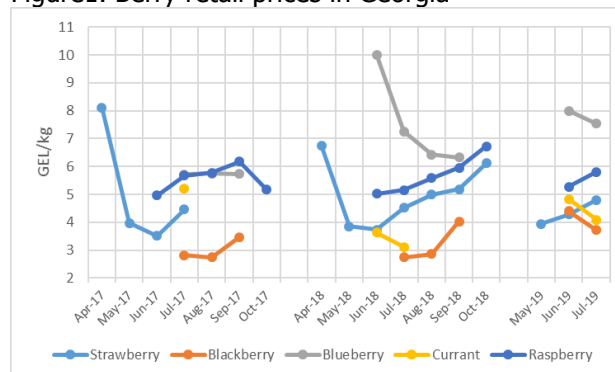
SERVICE PROVIDERS AND ASSOCIATED FEES

There are many intermediaries and distribution companies involved in bringing harvest from the farm to the local and international buyers.⁵

Specialized distributors supply berries to supermarket chains, and some also supply to open markets. These intermediaries add about 1-1.5 GEL/kg on farm gate price. There are many small entrepreneurs operating small scale trucks; these entrepreneurs mostly supply berry harvest to open markets and small retail shops (neighborhood shops). On average, supermarket chains add further 40% to the price, open markets - 20%, and neighborhood shops - 30%.

Berry retail prices were characterized with a considerable variability throughout the production season. With the exception of raspberries, retail prices on all types of berries were high during the start and the end of the season, and troughs corresponded to the peak of market availability. In case of raspberries, higher prices were recorded in the end of supply season (Figure 1).

Figure 1. Berry retail prices in Georgia



Source: MEPA

⁵ Interviews with a berry and agricultural marketing experts

Storage services are available, but the service fees are quite high. One month rent of 100 square meter storage facility is about \$US 5 thousand plus electricity cost.

Packaging containers are imported from Turkey. Mainly they come in 125 gr and 0.5 kg capacity sizes. The price of 125 gr plastic containers has been 4-5 \$US cents/piece. Due to limited availability of containers, in general, berries are not handled (sorting, grading) and packed in the field, directly into the final container, and this practice negatively affects product quality. In general blueberries are exported in 125 gr capacity containers, and blackberries in 0.5 kg capacity containers.

There are no specialized exporters. Entrepreneurs who are involved in export of greens, peaches, apples, and other fruits and vegetables have also exported berries. Exporters from Azerbaijan have also been very proactive in Georgian market. They generally export berries with 12 ton capacity refrigerated trucks; less frequently, exporters use 5 ton capacity refrigerated trucks. Mostly they supply Russian market. Also, some entrepreneurs supply Russian market with Georgian berries through Abkhazia.

Berries to the Gulf markets are supplied by air. Transportation cost by air has been 1.5-2 \$US/kg. There is a potential to expand exports to Gulf markets. These markets provide 10-14 day window of opportunity for Georgian exports before supplies from Spain and Morocco are available at the market. In-land transportation cost to other export markets is around 1 \$US/kg. The above mentioned transportation costs include actual transportation cost plus associated service fees.

Exports to EU markets have not been considered attractive for local entrepreneurs for the reasons as follows: high quality requirements (it costs about EUR 13 thousand to implement GlobalGAP); cheaper and better quality of locally available berries; and relatively low buy prices compared to other markets.⁶

SHORTCOMINGS AND GAPS

There are number of shortcomings and gaps that negatively affect yield levels and quality of harvest; these include: scarcity of quality labor, lack of proper spraying machines, mulching equipment, harvesters, pre-coolers, limited availability of adequate plant protection products, missing local availability of

packaging, and grower limited knowledge and experience in berry production.

The biggest challenge has been missing pre-cooling services that negatively affects quality of berries destined for export markets. There is only one pre-cooler in the country. It affects the quality of exports. One pre-cooler worth of EUR 15 thousand should be sufficient for 15 ha area orchard. Also, there is a lack of small scale refrigerated trucks 300-400 kg capacity (EUR 2.5-3K per piece, second-hand) to bring harvest from the field to the storage facility.

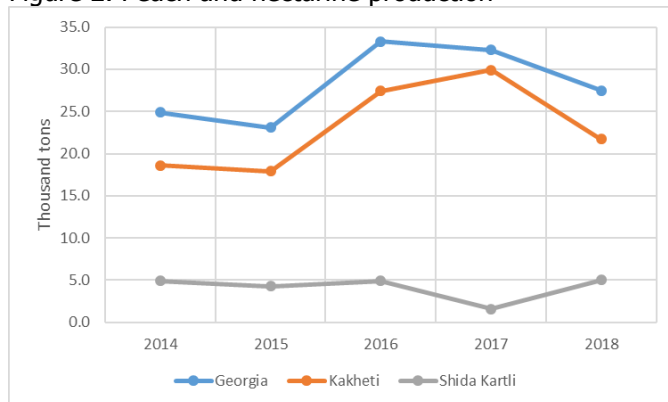
Labor cost has been substantial, and mostly it is due to significant outlays on manual harvest. Increased availability of harvesters (about EUR 30 thousand) should substantially reduce unit production cost. In general, pesticides suitable for berry production have been missing in local market; there has been limited interest among input suppliers to register these plant protection products given small size of the sector.

3.2. NECTARINES AND PEACHES

PRODUCTION AND MARKET AVAILABILITY

In Georgia, Kakheti and Shida Kartli Regions are the main producers of peaches and nectarines. During 2014-18, Georgia annually, on average, produced 28.2 thousand tons of peaches and nectarines together. Average shares of Kakheti and Shida Kartli regions in total production were 81% and 15%, respectively. In Georgia, and in both regions, peach and nectarine output were characterized with an increasing pattern; during this period output in Georgia increased by 2%, in Kakheti by 3% and in Shida Kartli by around 1% (Figure 2).

Figure 2. Peach and nectarine production



Source: NSO

⁶ Interview with berry experts and market participants

Peach and nectarine average yield per tree is about 60-70 kg. At the prevailing planting rate of 400 trees/ha, per tree yield translates into 24-27 ton per hectare yield level. Around 3 tons represent waste, and only about 21-24 tons are harvested per hectare. From the total output on average approximately 70% is represented by so called 1st grade peaches and nectarines, and the remaining 30% is considered as the 2nd grade crop.

On average, expenditures per hectare is about GEL 3,000-3,500. The main expenditure item is labor. Labor is heavily used for implementation of different practices such as measures against pests and diseases, nutrition, harvest, etc. The second most important cost item relates to pesticides, and the third to fertilizers.

Peach and nectarine production require irrigation. In general, growers apply furrow irrigation practice. There has been limited application of drip systems. The biggest challenges in the production have been drought and hail. Also, during drought, frequently there has been shortage in irrigation water supply.

Growers in general do not find marketing to be an issue. Peaches and nectarines are available at the market from the beginning of June through September. Buyers visit farms and make procurement on the spot. These buyers represent local cold storage facility operators, and intermediaries from Armenia and Azerbaijan. During certain transactions, mainly for domestic market supply, growers use their own packaging (second hand); they are so called “banana” boxes.

SERVICE PROVIDERS AND ASSOCIATED FEES

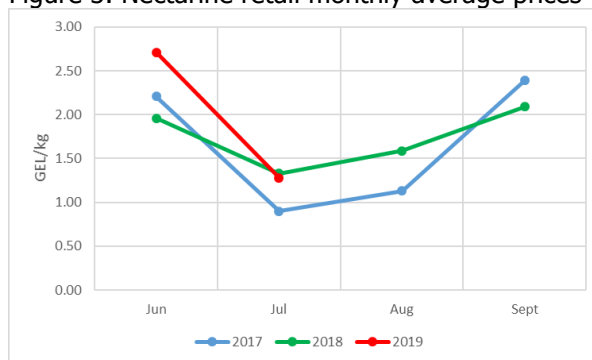
In general, pre-cooling has been missing. Reportedly, peaches and nectarines in good condition can be stored up to one month. Procurements at cold storages are made by exporters from Azerbaijan, Armenia, and Ossetia. Reportedly, most of the procurement is designated for Russia’s market. It costs about GEL 4,000 to rent 170 square meter cold storage facility. One of the major challenges faced by cold storage operators has been frequent cuts in electricity supply.

There is local production of plastic boxes in Gurjaani district and in Tbilisi; In Gurjaani 14 kg capacity boxes cost about 0.1 GEL/unit, while 8 kg capacity boxes – around 0.24 GEL/unit. Tbilisi packaging prices have been as follows: GEL 1.05 per 5 kg capacity boxes, and GEL 1.7 per 8 kg capacity plastic boxes. For exports, peaches and nectarines are placed on one layer. Market actors’ appraisals of the quality of boxes have been varying.

Product sales prices at the cold storage facility have been variable. This year, during the first harvest, sales price on the spot was 1.4-1.5 GEL/kg, during the second harvest 2 GEL/ kg, and in the end of the season prices soared to 4 GEL/kg.

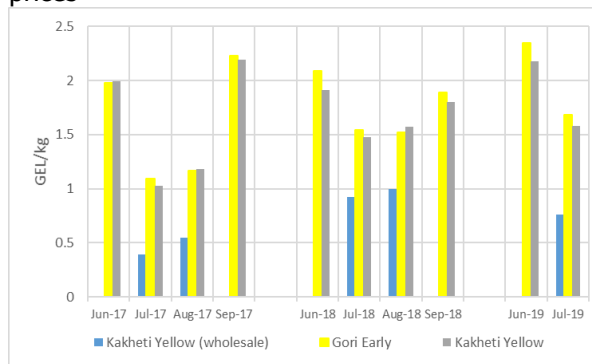
Nectarine and peach local retail prices are high at the start and the end of marketing season. Price troughs correspond to the peak of supplies, mid-July to mid-August period (Figures 3 and 4).

Figure 3. Nectarine retail monthly average prices



Source: MEPA

Figure 4. Peach wholesale and retail monthly average prices



Source: MEPA

There are several established export companies specializing in export of peaches and nectarines. Transportation cost from Georgia to different export markets ranges between \$US 2,800 to \$US 3,500 per truck.

SHORTCOMINGS AND GAPS

Reportedly, peach and nectarine quality has been variable during the analysis period in terms of the size of the fruit, and organoleptic characteristics. Exporters attributed variability of the quality to the improper production practices, varietal characteristics, quality of plant protection products, and inadequate implementation of plant protection measures.

In the post-harvest handling stage of the supply chain, pre-cooling of harvest at the cold storage has been missing; this negatively has affected quality of peaches and nectarines.

From the exporters stand point one of the shortcomings in the current system of exports has been limited handling of stored products by cold storage operators. Reportedly, cold storage operators do not sort and grade peaches and nectarines upon delivery and fruits are stored as delivered. One of the reasons is the missing equipment for sorting and grading. Reportedly none of the cold storage facilities in peach and nectarine growing regions own sorting and grading lines. To meet export market requirements, exporters have to incur additional expenditures for sorting and grading that is done manually and spend about three days in the field to load one 17 thousand ton capacity truck. It costs about GEL 2 thousand to sort and grade and load 17 thousand capacity refrigerated truck.

According to the exporters, the biggest challenge for Georgian producers to supply EU market is to meet pesticide residue requirement, and compete successfully with other suppliers in terms of the size of a fruit and organoleptic characteristics.

3.3. DRIED FRUITS⁷

PRODUCTION AND MARKETING SYSTEM

Established producers/ exporters produce different types of dried fruits. They generally do not produce mixes. Main dried fruit produced is prunes; also, dried persimmons, melons, and watermelons are produced. Recently local companies started production of dried peaches and grapes.

Mostly raw materials are sourced locally, and mainly figs and apricots are imported. Processors view the quality of local production as high; unit buy prices are often prohibitively high. For instance, buy prices of prunes, apples, and peaches have been 0.4-1.2 GEL/kg, 0.4-1.2 GEL/kg, and 0.7 GEL/kg, respectively. According to the exporters, one of the reasons of high price of raw materials is low productivity in primary sector. Also, unfavorable climatic conditions such as hail, is often cited as having significant negative impact on the availability of quality raw materials.

Local dried fruit sector targets high-end segment in export markets. Georgia dried fruit compete with the world leaders in dried fruit sector. Exports include both

conventional and organic dried fruits. Although Georgian dried fruits are supplied to the premium segment and prices are high, production costs still could be reduced substantially. High production cost is mainly due to high labor cost in processing; in general, processing lines are not complete, thus requiring manual labor input. One of the major exporters requires investment in amount of \$US 40-50 thousand to complete the processing line and reduce labor cost; this investment can substantially reduce production cost, even 3 times. One of the biggest competitors to Georgia's exports have been dried fruits from Uzbekistan. Raw materials in general are sourced by Uzbek processors at maximum \$US 9 cents per kg. Raw materials reportedly are cheap in Uzbekistan due to high productivity, and low quality.

Most of the companies have ISO and HACCP certificates. Some of them plan to implement BRC system. Main export markets include Lithuania, Hong-Kong, Czech Republic, Germany and Netherlands. Local processors consider promotion and consumer awareness to be crucial for successful marketing in export markets. Conventional dried fruit producers after several years of pro-active awareness raising have managed to find their place in local market; however, they have faced significant challenge during transactions with local retail chains; these specifically included high entrance fees and substantial delays to collect receivables.

SERVICE PROVIDERS AND ASSOCIATED FEES

In general, dried fruit producers themselves represent exporters and operate their own distribution networks. In export markets they employ importer services. Reportedly, margins collected in export markets by different actors (importers, wholesalers, retailers) roughly are the same as assessed by retailers at local outlets. Transportation service fee to EU markets ranged between 3,000 – 4,000 EUR/ truck, and the service is provided by local transportation companies.

SHORTCOMINGS AND GAPS

There are several shortcomings that have a negative impact on competitiveness of Georgian dried fruits, both in export and local markets. One shortcoming is high price of raw materials and unfavorable weather conditions (hail), and difficulties in sourcing and aggregation of desired quality raw materials in desired quantities. Another shortcoming is an incomplete processing lines leading to an increased outlays on labor; and the third shortcoming is limited awareness

⁷ Interview with producer/ exporter

of consumers in export markets about Georgia's dried fruits.

3.4. JUICES⁸

PRODUCTION AND MARKET AVAILABILITY

There are 5 companies involved in juice production; and only 3 are focused on production of juices from fresh fruits. Export markets for these 3 companies represent main sales channels for their products. The most challenging for juice producers has been sourcing locally of fresh fruits for further processing. Established full bearing commercial orchards have been only for apples, peaches/ nectarines, and mandarins. Peach/ nectarine is mainly supplied to fresh market, and its processing has not been carried out. Apple and mandarins harvest include substantial volumes of processing quality fruits. Production is concentrated among small scale growers, and it represents important livelihood for them. Therefore, prices even on processing grade fruits have been high, impacting prices of end-products. One large juice producer integrated backward into fruit production to ensure constant supply of quality

Local market has not been very attractive for local juice producers due to major factors as follows: limited demand on juices in local market given low purchasing power of consumers and availability of substitutes such as "lemonade", and excessive use of a "buyer power" by local retail chain that makes difficult for products timely collect receivables for delivered products.

Service providers and associated fees

In general, juice producers operate their own distribution networks. Juice companies themselves represent exporters and operate in foreign markets in cooperation with importers.

Shortcomings and gaps

Main shortcomings of juice producers have been challenges related to the sourcing of adequate quality raw materials at acceptable prices in desired quantity and time. Moreover, significant challenge has been timely collection of receivables for delivered products from retail chains; this often forces juice producers to borrow funds due to the lack of working capital.

Wine Grape spirit⁹

Production and market availability

As reported, 31 companies are involved in the production and export of grape spirits. Production of grape spirits has been characterized with an increasing pattern. In general wine producers represent grape spirit producers. Grape spirits usually are exported as part of the package, i.e. along with the different types of wines. There is no separate export of grape spirits from Georgia.

Out of the 31 companies, reportedly only 1 or 2 companies should have own distillation process. The other companies are using services of small distillation companies. They take grape must to these companies, and service providers deliver grape spirits.

Shortcomings and gaps

The biggest challenge for grape spirit producers has been outdated distillation equipment of service provider distilleries and limited adherence to food safety standards. This requires continual supervision of processes at distilleries.

Some of the large wine companies, who after testing export markets for grape spirits found the market to be attractive, have decided to invest in own distillation.

Another challenge has been limited awareness of Georgian grape spirits in export markets. This requires pro-active promotion of grape spirits in potential export markets.

For wineries, the biggest cost item in grape spirit production is the cost of a bottle. Reputable grape spirit producers import bottles from Italy, from where quality bottles are imported at 0.4 EUR/unit.

Trade

Fresh Berries

Strawberry

[Georgia](#) started strawberry exports only in 2017. On average, during 2017-18, Georgia exported 84 tons of strawberries worth of EUR 51 thousand. Average export unit price of strawberries during this period was 0.6 EUR/kg. From 2017 to 2018, the value, volume, and

⁸ Interview with market experts

⁹ Interview with representatives of public regulatory agency and wine producer/ exporter

export unit prices of strawberry exports dropped by 75%, 45%, and 35%, accordingly (Table 1).

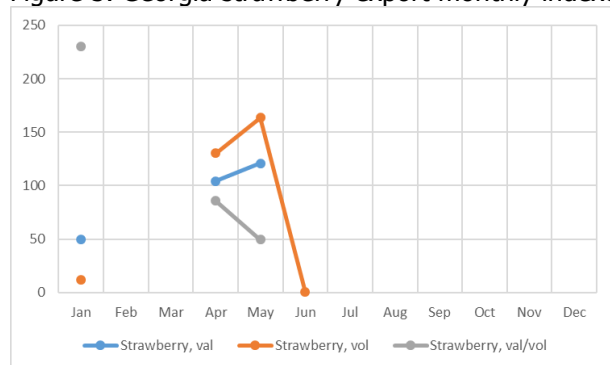
Table 1. Strawberry annual exports, Georgia

	Strawberry, val	Strawberry, vol	Strawberry, val/vol
2017	96	128,591	0.9
2018	6	38,777	0.4
Mean	51	83,684	0.6
CAGR	-75%	-45%	-35%

Source: www.intracen.org, estimates

Strawberries were exported in January and during April-June period. Peak of supplies was in May. Prices were higher during the start of the year (0.9 EUR/kg) relative to April-May (0.35 EUR/kg) (Figure 5, Table 5).

Figure 5. Georgia strawberry export monthly indexes



Source: www.intracen.org, estimates

Table 5. Strawberry annual average export unit prices and volatility

	Mean	Volatility
Jan	0.9	0.4
Apr	0.7	0.8
May	0.3	0.7

Source: www.intracen.org, estimates

Main export markets of Georgia's strawberries included Russia, Latvia, and Qatar, and export shares to these countries were 14%, 13%, and 1%, respectively.

Bulgaria's imports of strawberries was characterized with a declining trend. Value and volume of imports dropped by 12% and 6%, respectively; also import unit prices declined by 15%. On annual basis, on average, Bulgaria has been importing 2.8 thousand tons of strawberries worth of EUR 3.1 million; average import unit price totaled 2.4 EUR/kg (Table 6).

Table 6. Strawberry annual imports, Bulgaria

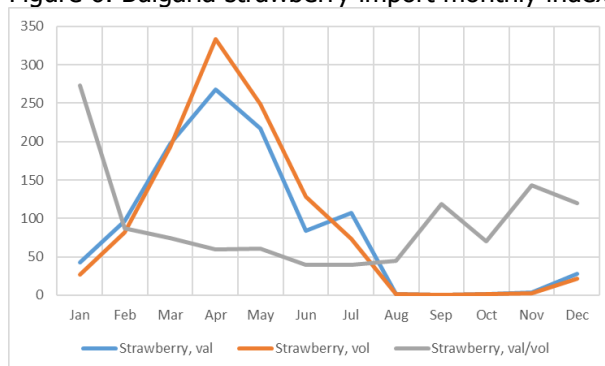
	Strawberry, val	Strawberry, vol	Strawberry, val/vol
2014	3,690	3,360,932	5.9

2015	2,353	1,838,323	1.6
2016	3,377	3,302,669	1.5
2017	3,417	2,840,370	1.7
2018	2,630	2,487,235	1.3
Mean	3,093	2,765,906	2.4
CAGR	-12%	-6%	-15%

Source: www.intracen.org, estimates

Bulgaria has been importing strawberries throughout the year. Supply peaks corresponded to February-July period; during supply troughs import unit prices (2-11 EUR/kg) were considerably higher than during high supply periods (0.7-1.4 EUR/kg) (Figure 6, Table 7).

Figure 6. Bulgaria strawberry import monthly indexes



Source: www.intracen.org, estimates

Table 7. Strawberry annual average import unit prices and volatility

	Mean	Volatility
Jan	11.0	1.8
Feb	1.6	0.2
Mar	1.3	0.2
Apr	1.0	0.1
May	1.1	0.1
Jun	0.7	0.2
Jul	0.8	0.6
Aug	1.4	0.6
Sept	3.8	0.6
Oct	2.1	0.9
Nov	2.9	0.5
Dec	2.0	0.5

Source: www.intracen.org, estimates

Main import suppliers of strawberries to Bulgaria's market were Greece, Germany, and Albania; these countries have accounted for about 87%, 7%, and 1% of total strawberry imports to Bulgaria.

Romania's imports of strawberries although insignificantly, soared during the analysis period. Import value and volume, and import unit prices have soared by 3%, 4% and 1%, accordingly. Romania, on average, annually has imported about 6 thousand tons

of strawberries worth of EUR 7.4 million; average import unit price has been 3.3 EUR/kg (Table 8).

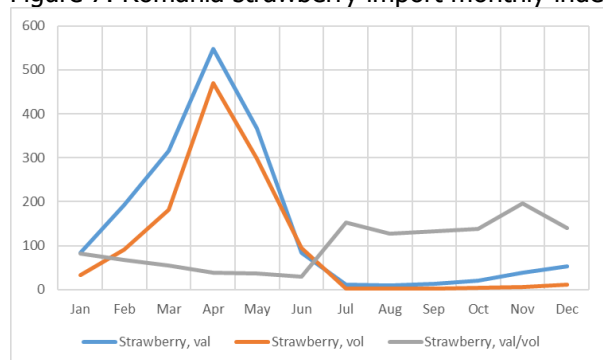
Table 8. Strawberry annual imports, Romania

	Strawberry, val	Strawberry, vol	Strawberry, val/vol
2014	2,272	4,530,049	2.9
2015	1,932	4,454,132	2.5
2016	9,432	6,496,575	3.4
2017	11,196	6,563,573	3.8
2018	11,956	7,031,756	3.9
Mean	7,358	5,815,217	3.3
CAGR	3%	4%	1%

Source: www.intracen.org, estimates

Strawberry import supply peak corresponded to January-June period, and the trough to July-December. Import unit prices have had inverse pattern to those of the import volume and value. Import unit prices ranged between 1-6.3 EUR/kg (Figure 7, Table 9).

Figure 7. Romania strawberry import monthly indexes



Source: www.intracen.org, estimates

Table 9. Strawberry annual average import unit prices and volatility, Romania

	Mean	Volatility
Jan	2.8	0.3
Feb	2.3	0.3
Mar	1.8	0.2
Apr	1.2	0.2
May	1.2	0.3
Jun	1.0	0.3
Jul	5.3	0.5
Aug	4.2	0.3
Sept	4.5	0.4
Oct	4.4	0.3
Nov	6.3	0.1
Dec	4.5	0.1

Source: www.intracen.org, estimates

About 70% of Romania’s imports of strawberries were concentrated among three import suppliers; these

included Turkey, Greece, and Germany; these countries have account for 30%, 31%, and 9% of total import supplies of strawberries.

Raspberries

[Georgia](#) has not exported raspberries during the analysis period. However, the sector has been growing, and there has been potential for export.

[Bulgaria](#) on annual basis imported 13.4 thousand tons of raspberries worth of EUR 58 thousand. Average import unit price of raspberries has been 7.4 EUR/kg. The volume of raspberry imports was characterized with a declining pattern (-4%), while the value of imports - soared (13%); import unit prices dropped by 3% (Table 10).

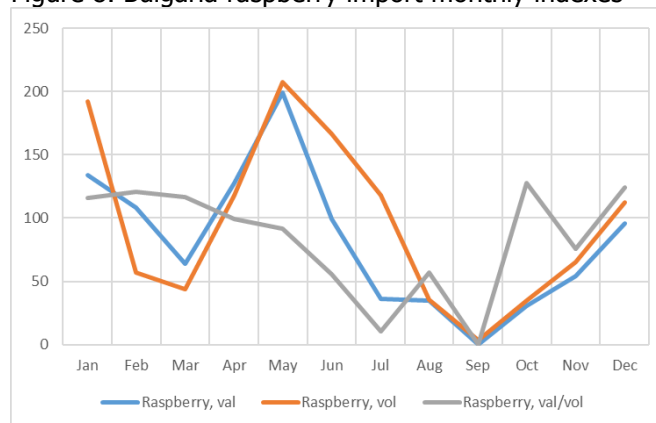
Table 10. Raspberry annual imports, Bulgaria

	Raspberry, val	Raspberry, vol	Raspberry, val/vol
2014	38	13,774	8.7
2015	75	18,904	7.6
2016	58	8,562	7.6
2017	46	14,248	5.3
2018	71	11,293	7.6
Mean	58	13,356	7.4
CAGR	13%	-4%	-3%

Source: www.intracen.org, estimates

Bulgaria has been importing raspberries throughout the year. Import peaks corresponded to January, May, October, and December. During June-August import unit prices (0.8-4.3 EUR/kg) were at their lowest level. Overall, import unit prices followed the pattern of import volume and value (Figure 8, Table 11).

Figure 8. Bulgaria raspberry import monthly indexes



Source: www.intracen.org, estimates

Table 11. Raspberry annual average import unit prices and volatility, Bulgaria

	Mean	Volatility
Jan	2.8	0.3
Feb	2.3	0.3
Mar	1.8	0.2
Apr	1.2	0.2
May	1.2	0.3
Jun	1.0	0.3
Jul	5.3	0.5
Aug	4.2	0.3
Sept	4.5	0.4
Oct	4.4	0.3
Nov	6.3	0.1
Dec	4.5	0.1

Jan	8.3	0.6
Feb	8.9	0.6
Mar	8.7	0.5
Apr	7.5	0.5
May	7.0	0.5
Jun	3.9	0.6
Jul	0.8	0.4
Aug	4.3	0.4
Sept		
Oct	8.0	0.8
Nov	5.9	0.8
Dec	9.2	0.7

Source: www.intracen.org, estimates

Main import sources of raspberries to Bulgaria's market have been Spain, Netherlands, and Italy, and these countries roughly accounted for 34%, 26%, and 16% of total raspberry imports of Bulgaria.

Romania's imports of raspberries was characterized with a notable increase. Import value, volume, and import unit prices increased by 64%, 36%, and 17%, accordingly. Romania, on average, annually imports 151 tons of raspberries worth of EUR 1 million. Average import unit price was 7.6 EUR/kg (Table 12).

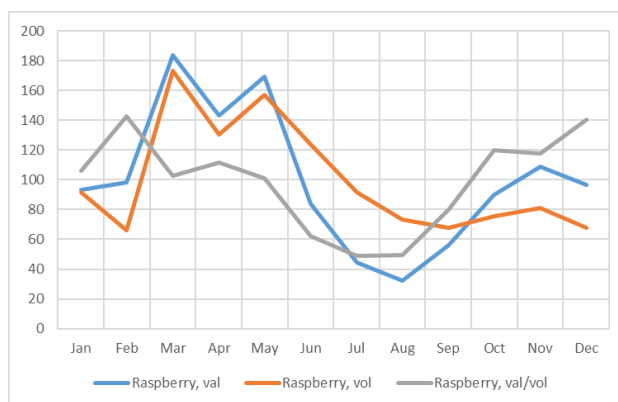
Table 12. Raspberry annual imports, Romania

	Raspberry, val	Raspberry, vol	Raspberry, val/vol
2014	239	62,533	4.4
2015	320	68,576	5.4
2016	776	82,157	9.7
2017	1,935	251,184	8.9
2018	2,875	287,985	9.5
Mean	1,229	150,487	7.6
CAGR	64%	36%	17%

Source: www.intracen.org, estimates

Raspberry import troughs corresponded to June-September period. Import unit price movement had similar pattern to those of import value and volume. Import unit prices ranged between 3.7-10.8 EUR/kg (Figure 9, Table 12).

Figure 9. Romania raspberry import monthly indexes



Source: www.intracen.org, estimates

Table 12. Raspberry annual average import unit prices and volatility

	Mean	Volatility
Jan	8.1	0.6
Feb	10.8	0.4
Mar	7.9	0.4
Apr	8.3	0.4
May	7.7	0.4
Jun	4.1	0.6
Jul	3.7	0.4
Aug	4.2	0.6
Sept	6.4	
Oct	9.1	0.4
Nov	8.9	0.4
Dec	10.4	0.4

Source: www.intracen.org, estimates

More than half of raspberry imports originated from Netherlands, Germany, and Belgium; these countries have accounted for 59%, 8%, and 4% of total raspberry imports to Romania, accordingly.

Blackberries

During 2014-18, Georgia exported blackberries only in 2015. The value and volume of exports amounted to EUR 2 thousand and 0.6 tons, accordingly; unit price of exports totals 0.3 EUR/kg. Main market for blackberries was Russia.

Bulgaria's imports of blackberries was characterized with an increasing pattern. Value, volume, and import unit prices of blackberry imports increased by 25%, 2%, and 11%, accordingly. On average, Bulgaria on annual basis has been importing 61 tons of blackberries worth of EUR 98 thousand. Import unit prices approximated 5 EUR/kg (Table 13).

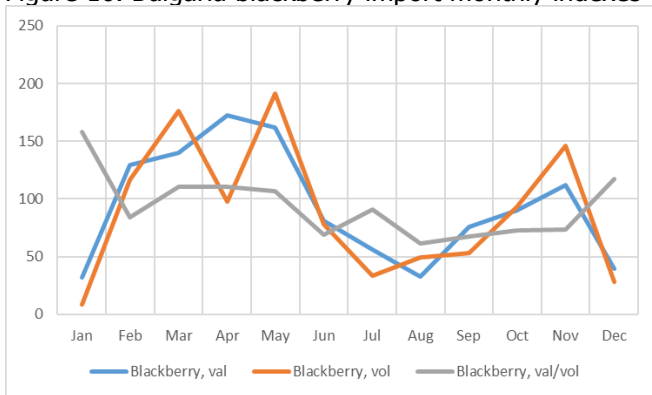
Table 13. Blackberry annual imports, Bulgaria

	Blackberry, val	Blackberry, vol	Blackberry, val/vol
2014	65	36,693	2.5
2015	333	164,905	2.2
2016	13	10,866	7.2
2017	30	47,287	6.2
2018	47	49,529	7.6
Mean	98	61,856	5.1
CAGR	25%	2%	11%

Source: www.intracen.org, estimates

Blackberries have been imported throughout the year. Import peaks corresponded to February-May, and September-November periods. Overall, movement of import unit prices and import value and volume were characterized with a similar pattern throughout the year. Low price (1.4 EUR/kg) was estimated for September, and high import unit price of 7.3 EUR/kg in January (Figure 10, Table 14).

Figure 10. Bulgaria blackberry import monthly indexes



Source: www.intracen.org, estimates

Table 14. Blackberry annual average import unit prices and volatility, Bulgaria

	Mean	Volatility
Jan	7.3	0.6
Feb	3.1	0.8
Mar	5.5	1.2
Apr	5.4	1.0
May	6.0	0.9
Jun	2.8	0.8
Jul	4.8	0.7
Aug	1.3	0.4
Sept	1.4	0.4
Oct	4.2	1.1
Nov	3.6	1.0
Dec	4.8	1.0

Source: www.intracen.org, estimates

Blackberries to Bulgaria's market were mainly supplied by Poland, Germany, and Netherlands; share of these countries in total blackberry imports of Bulgaria totaled 32%, 28%, and 26%, accordingly.

Both the value and volume of [Romania's](#) blackberry imports were characterized with an increasing pattern; the value of supplies increased by 7%, and the volume by 43%; the same time import unit price dropped by 10%. On average, Romania, annually imported 106 tons of blackberries worth of EUR 474 thousand (Table 15).

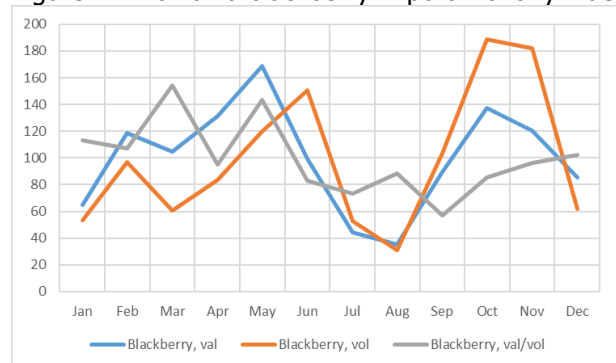
Table 15. Blackberry annual imports, Romania

	Blackberry, val	Blackberry, vol	Blackberry, val/vol
2014	131	34,448	
2015	289	153,466	
2016	296	71,739	
2017	773	88,384	9.7
2018	881	180,915	7.9
Mean	474	105,790	8.8
CAGR	7%	43%	-10%

Source: www.intracen.org, estimates

Blackberry import supply peaks were derived for February, May-June, and September-November periods. Overall import unit prices were greater during the first half of the year compared to the second half of the year. Average import unit prices ranged between 4.2-11 EUR/kg (Figure 11, Table 15).

Figure 11. Romania blackberry import monthly indexes



Source: www.intracen.org, estimates

Table 15. Blackberry annual import unit prices and volatility, Romania

	Mean	Volatility
Jan	8.3	0.6
Feb	8.3	0.7
Mar	11.0	0.4
Apr	7.1	0.5
May	9.6	0.5

Jun	5.8	0.8
Jul	5.2	0.7
Aug	6.4	0.7
Sept	4.2	0.7
Oct	5.8	1.0
Nov	6.6	1.1
Dec	8.0	0.8

Source: www.intracen.org, estimates

Netherlands, Belgium, and Spain, together have accounted for about 79% of total imports of blackberries to Romania. Individually, these countries supplied 73%, 4%, and 2% of total blackberry imports.

Currants and gooseberries (CG)

During 2014-18, [Georgia](#) exported C&G only in 2017 and 2018. Average value, volume, and export unit price totaled EUR 17 thousand, 11 tons, and 1.8 EUR/kg, accordingly. From 2017 to 2018, export volume and value of CG exports increased by 55% and 72% accordingly, whereas export unit value dropped by 11% (Table 16).

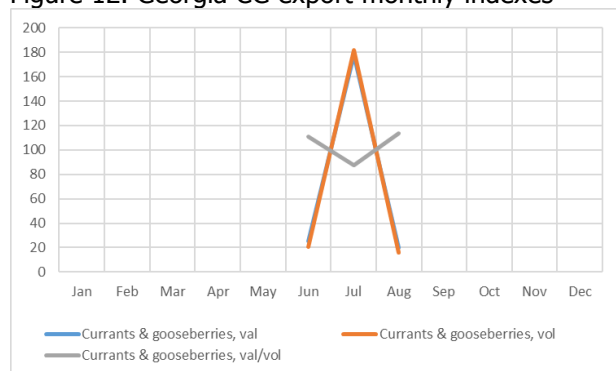
Table 16. CG annual exports, Georgia

	Currants & gooseberries , val	Currants & gooseberries , vol	Currants & gooseberries , val/vol
2017	10	5,513	2.0
2018	24	16,216	1.6
Mean	17	10,865	1.8
CAG R	55%	72%	-11%

Source: www.intracen.org, estimates

Exports of CG occurred during June-August, and July was the peak of exports. July also corresponded to highest export unit prices – 0.6 EUR/kg. Export unit prices increased from 0.4 EUR/kg to 0.6 EUR/kg (Figure 12, Table 17).

Figure 12. Georgia CG export monthly indexes



Source: www.intracen.org, estimates

Table 17. CG annual average export unit prices and volatility, Georgia

Currant and Gooseberries		
	Mean	Volatility
Jun	1.8	0.4
Jul	1.6	0.6
Aug	2.3	0.4

Source: www.intracen.org, estimates

Nearly all CG were exported By Georgia to Russia, and only very small quantity was supplied to Armenia's market.

[Bulgaria](#), on average, imported 164 tons of CG worth of EUR 50 thousand; import unit price has been 2.5 EUR/kg. Import supplies were characterized with a declining trend; value and volume imports dropped by 31% and 36%, accordingly; however, import unit prices soared by 34% (Table 18).

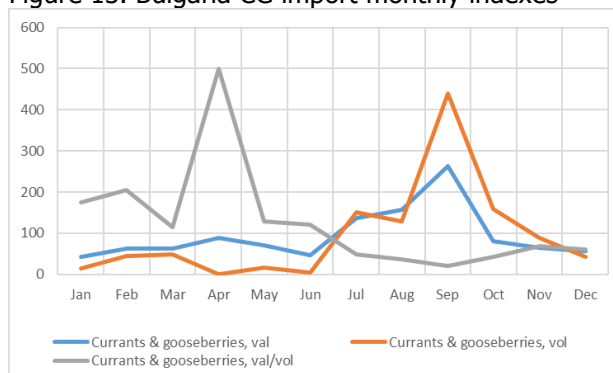
Table 18. CG annual import, Bulgaria

	Currants & gooseberries , val	Currants & gooseberries , vol	Currants & gooseberries , val/vol
2014	106	343,242	1.0
2015	52	140,889	0.5
2016	57	237,020	4.6
2017	19	63,530	2.3
2018	16	36,513	4.3
Mean	50	164,239	2.5
CAG R	-31%	-36%	34%

Source: www.intracen.org, estimates

Bulgaria has imported CG throughout the year. Import supply peaks corresponded to July-September period. Import unit price high was estimated for April (22.8 EUR/kg), and a low – in August and October (0.3 EUR/kg) (Figure 13, Table 19).

Figure 13. Bulgaria CG import monthly indexes



Source: www.intracen.org, estimates

Table 19. CG annual average import unit prices and volatility, Bulgaria

	Mean	Volatility
Jan	6.7	1.3
Feb	3.0	1.0
Mar	5.1	1.2
Apr	22.8	0.4
May	1.6	0.7
Jun	1.2	0.4
Jul	0.4	0.6
Aug	0.3	0.6
Sept	0.2	0.5
Oct	0.3	0.7
Nov	1.1	1.3
Dec	2.4	1.1

Source: www.intracen.org, estimates

Greece, Poland, and Netherlands have accounted for 90% of Bulgaria's CG imports. The proportions of these countries in total imports of CG to in Bulgaria were 61%, 14%, and 15%, accordingly.

The value of [Romania's](#) imports of CG was characterized with an increasing pattern (17%), while the volume – with a decline (-4%); Import unit price increased by 27%. Annually, Romania, on average, imported 103 tons of CG worth of EUR 479 thousand (Table 20).

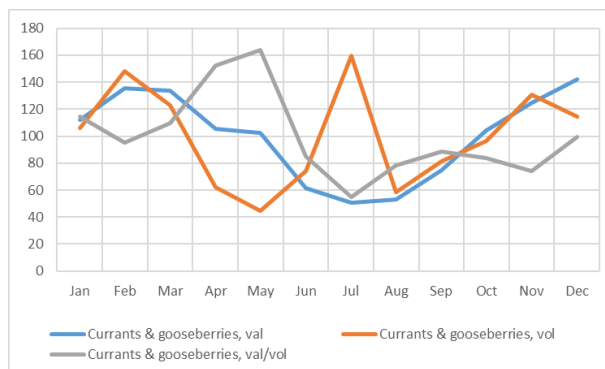
Table 20. CG annual imports, Romania

	Currants & gooseberries, val	Currants & gooseberries, vol	Currants & gooseberries, val/vol
2014	313	101,790	3.9
2015	370	157,230	3.0
2016	470	107,258	6.7
2017	550	66,193	10.9
2018	692	84,274	12.8
Mean	479	103,349	7.4
CAGR	17%	-4%	27%

Source: www.intracen.org, estimates

Import volume supply trough corresponded to June-September period, while import value trough to April-June period. Import unit price peak was estimated for January-May. Import unit prices ranged between 4.1-12.3 EUR/kg (Figure 14, Table 21)

Figure 14. Romania CG import monthly indexes



Source: www.intracen.org, estimates

Table 21. CG annual average import unit prices and volatility, Romania

	Mean	Volatility
Jan	8.6	0.8
Feb	7.6	1.1
Mar	7.8	0.7
Apr	12.0	0.8
May	12.3	0.7
Jun	5.1	0.5
Jul	4.1	0.9
Aug	5.9	0.6
Sept	6.7	0.6
Oct	6.3	0.6
Nov	6.0	0.8
Dec	6.8	0.6

Source: www.intracen.org, estimates

Netherlands, Belgium and Spain, together, accounted for about 79% of CG import supplies to Romania's market; individually the proportions supplied by these countries totaled 73%, 4%, and 2%, accordingly.

Cranberries and Bilberries (CB)

On average, [Georgia](#) exported 74 tons of CB worth of EUR 303 thousand. Average export unit price was 4.9 EUR/kg. During the analysis period, value and volume of CB exports increased by 28% and 30%, accordingly. The same time export unit prices have also increased by 1% (Table 22).

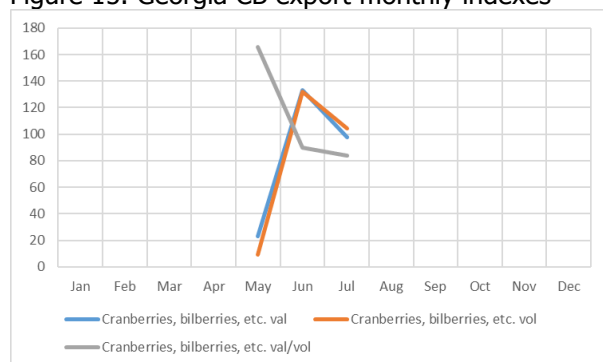
Table 22. CB annual exports, Georgia

	Cranberries, bilberries, etc. val	Cranberries, bilberries, etc. vol	Cranberries, bilberries, etc. val/vol
2014	109	28,380	3.9
2015	194	40,339	7.9
2016	424	84,830	5.0
2017	410	110,520	3.7
2018	378	106,828	4.1
Mean	303	74,179	4.9
CAGR	28%	30%	1%

Source: www.intracen.org, estimates

CB exports occurred during May-July. The peak of supplies was in June. Export unit prices dropped though the supply season from 10.3 EUR/kg to 3.9 EUR/kg. Volatility of prices were greater in the start of the season compared to the other periods (Figure 15, Table 23).

Figure 15. Georgia CB export monthly indexes



Source: www.intracen.org, estimates

Table 23. CB annual average export unit prices and volatility, Georgia

	Mean	Volatility
May	10.3	0.6
Jun	4.2	0.2
Jul	3.9	0.2

Source: www.intracen.org, estimates

CB exports were concentrated into the three markets, Russia, UAE, and Qatar, where 83% of total exports were supplied. Russia, UAE, and Qatar individually have accounted for 73%, 7%, and 3% of total export supplies, respectively.

On average, [Bulgaria](#) annually imported 204 tons of CB worth of EUR 700 thousand, and average import unit price was 5.1 EUR/kg. Both value and volume of imports soared during the analysis period by 18%, and 6%, respectively; while import unit prices dropped by approximately 4%. Bulgaria imported CB throughout the year (Table 24).

Table 24. CB annual imports, Bulgaria

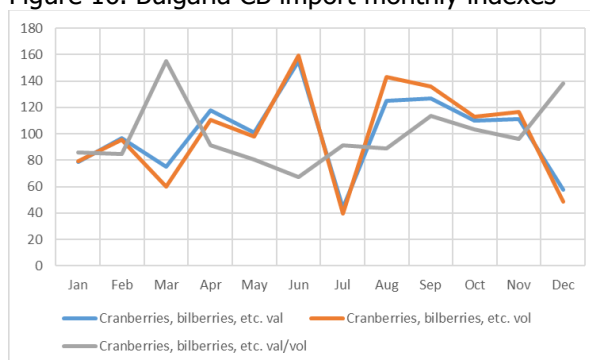
	Cranberries, bilberries, etc. val	Cranberries, bilberries, etc. vol	Cranberries, bilberries, etc. val/vol
2014	341	97,344	5.0
2015	509	149,468	6.2
2016	564	177,384	5.5
2017	870	278,734	4.5
2018	1,214	315,680	4.2
Mean	700	203,722	5.1

CAGR	18%	6%	-4%
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Source: www.intracen.org, estimates

Peak of supplies corresponded to February, April, June, August, and November. Notable troughs were estimated for July and December. Import unit prices were less volatile than the value and volume of imports. High import unit prices were recorded in March, September, and December (5.9-8.1 EUR/kg) (Figure 16, Table 25).

Figure 16. Bulgaria CB import monthly indexes



Source: www.intracen.org, estimates

Table 25. CB annual average import unit prices and volatility, Bulgaria

	Mean	Volatility
Jan	4.2	0.3
Feb	4.3	0.8
Mar	8.1	0.7
Apr	4.6	0.5
May	4.1	0.3
Jun	3.3	0.2
Jul	4.6	0.3
Aug	4.3	0.5
Sept	5.9	1.0
Oct	5.4	0.7
Nov	4.9	0.6
Dec	7.2	0.5

Source: www.intracen.org, estimates

About 67% of Bulgaria's imports of CB originated from Netherlands, Germany, and Slovakia. Shares of these countries in total imports of CB were 50%, 15%, and 2%, respectively.

The volume of [Romania's](#) imports of CB soared by 18%, while the value declined by 4%; the same time import unit prices have soared significantly, nearly by 55%. On average, Romania annually exported 609 tons of CB worth of EUR 2 million; import unit price was 6.6 EUR/kg (Table 26).

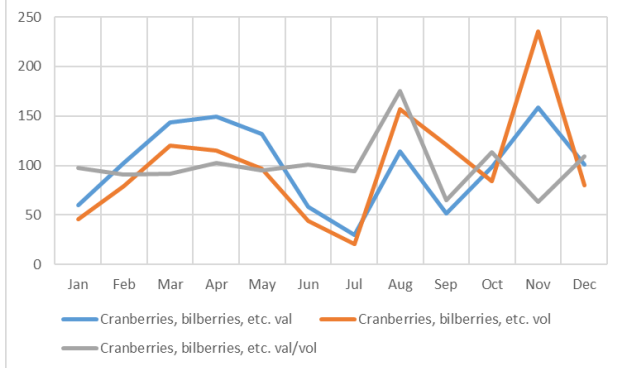
Table 26. CB annual imports, Romania

	Cranberries, bilberries, etc. val	Cranberries, bilberries, etc. vol	Cranberries, bilberries, etc. val/vol
2014	529	100,043	5.6
2015	914	163,302	6.7
2016	1,567	397,684	5.4
2017	3,898	997,353	4.4
2018	3,621	1,386,105	10.6
Mean	2,106	608,897	6.6
CAGR	-4%	18%	55%

Source: www.intracen.org, estimates

CB import supply peaks corresponded to March-May, August, and November periods. Import unit prices during the first half of the year were flat, and discerned considerable fluctuation from August through December. Import unit prices ranged between 5.5-16.1 EUR/kg (Figure 17, Table 27).

Figure 17. Romania CB import monthly indexes



Source: www.intracen.org, estimates

Table 27. CB annual average import unit prices and volatility, Romania

	Mean	Volatility
Jan	6.1	0.5
Feb	5.9	0.3
Mar	5.6	0.2
Apr	6.3	0.2
May	5.8	0.2
Jun	6.0	0.2
Jul	5.5	0.3
Aug	16.1	1.8
Sept	3.7	0.7
Oct	7.4	0.6
Nov	3.6	0.5
Dec	6.8	0.4

Source: www.intracen.org, estimates

Most of the imports of CB to Romania originated in Netherlands, Germany, and France; these countries, individually, accounted for 49%, 22%, and 6% of total import supplies, accordingly.

Peaches and Nectarines

Nectarine

On average, during 2014-18, [Georgia](#) annually exported 4.4 thousand tons of nectarines worth of EUR 2 million. Average export unit price during this period approximated 0.5 EUR/kg. Georgia's exports of nectarines in value, volume and unit price terms was characterized with an increasing pattern; the quantity of supplies to export markets has increased by 46%, while the value by 37%; export unit prices have also increased by 1% (Table 28).

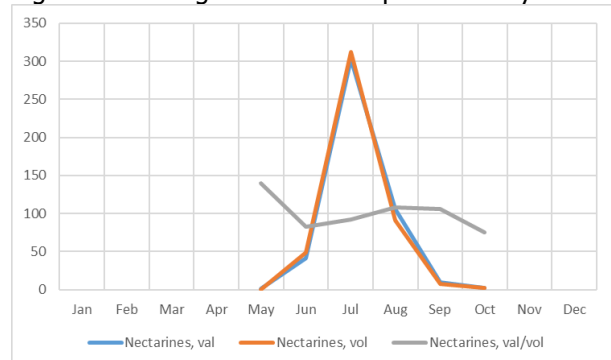
Table 28. Nectarine annual exports, Georgia

	Nectarines, val	Nectarines, vol	Nectarines, val/vol
2014	710	1,701,535	0.5
2015	1,069	2,115,150	0.5
2016	1,340	3,204,085	0.4
2017	2,357	6,780,681	0.6
2018	4,651	8,297,097	0.5
Mean	2,025	4,419,710	0.5
CAGR	46%	37%	1%

Source: www.intracen.org, estimates

In general, exports occurred during May-October period, and the peaks of export value and volumes were in July. In regard to the export unit prices, higher prices were in May (about 0.8 EUR/kg) compared to June-July (about 0.3-0.4 EUR/kg), and the peak was in August (0.5 EUR/kg). The start and the end of the season export unit prices were more volatile compared to the rest of the months when exports took place. In general larger export supplies corresponded to lower price volatility (Figure 18, Table 29).

Figure 18. Georgia nectarine export monthly indexes



Source: www.intracen.org, estimates

Table 29. Nectarine annual average export unit prices and volatility, Georgia

	Mean	Volatility
May	0.8	0.7

Jun	0.4	0.1
Jul	0.4	0.2
Aug	0.5	0.2
Sept	0.5	0.2
Oct	0.4	0.4

Source: www.intracen.org, estimates

Exports of Georgia's nectarines were concentrated into the three markets including Russia, Armenia, and Azerbaijan, and export supply shares in these markets were 83%, 1%, and 3%, accordingly.

Bulgaria's imports of nectarines was characterized with an increasing trend; value and volume of imports and import unit prices have increased by 11%, 10%, and 16%, accordingly. Bulgaria on annual basis has been importing 6.3 thousand tons of nectarines worth of EUR 1.8 million; a 5-year average import unit price has been 1.8 EUR/kg (Table 30).

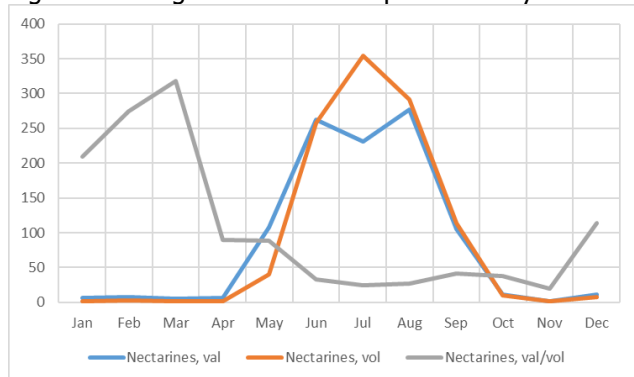
Table 30. Nectarine annual imports, Bulgaria

	Nectarines, val	Nectarines, vol	Nectarines, val/vol
2014	1,296	4,071,216	0.5
2015	1,686	7,177,664	0.6
2016	1,456	6,038,672	3.1
2017	2,156	7,395,338	3.5
2018	2,186	6,620,817	1.1
Mean	1,756	6,260,741	1.8
CAGR	11%	10%	16%

Source: www.intracen.org, estimates

Nectarines have been supplied to Bulgaria's market throughout the year. Peak of import supplies has been May-October period. This period corresponded to low prices (0.3-0.8 EUR/kg), while off-season supplies were characterized with a high prices (0.7-7.3 EUR/kg) (Figure 19, Table 31).

Figure 19. Bulgaria nectarine import monthly indexes



Source: www.intracen.org, estimates

Table 31. Nectarine annual average import unit prices and volatility, Bulgaria

	Mean	Volatility
Jan	1.9	0.7
Feb	6.8	1.4
Mar	7.3	1.7
Apr	1.0	0.3
May	0.8	0.1
Jun	0.3	0.2
Jul	0.2	0.6
Aug	0.3	0.2
Sept	0.8	1.6
Oct	0.3	0.6
Nov	0.3	0.7
Dec	0.7	0.6

Source: www.intracen.org, estimates

Major suppliers of nectarines to Bulgaria's market have been Greece, Germany, and Turkey. These import sources accounted for 61%, 11%, and 7% of total imports of Bulgaria, accordingly.

During the analysis period, Romania's nectarine imports have soared; the value of supplies increased by 12%, and the volume by 10%; import unit prices have also increased by 10%. On average, Romania, annually imported 32 thousand tons of nectarines at the value of EUR 18 million; and average import unit price was 1.5 EUR/kg (Table 32).

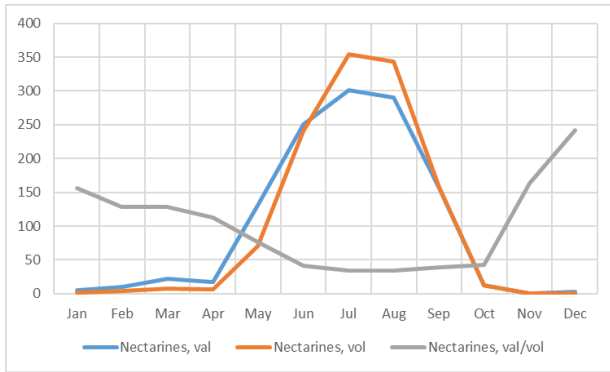
Table 32. Nectarine annual imports, Romania

	Nectarines, val	Nectarines, vol	Nectarines, val/vol
2014	11,228	27,071,639	1.3
2015	17,832	32,711,204	1.3
2016	19,160	31,264,050	1.2
2017	23,050	41,999,491	1.3
2018	20,179	28,017,435	2.2
Mean	18,290	32,212,764	1.5
CAGR	12%	1%	10%

Source: www.intracen.org, estimates

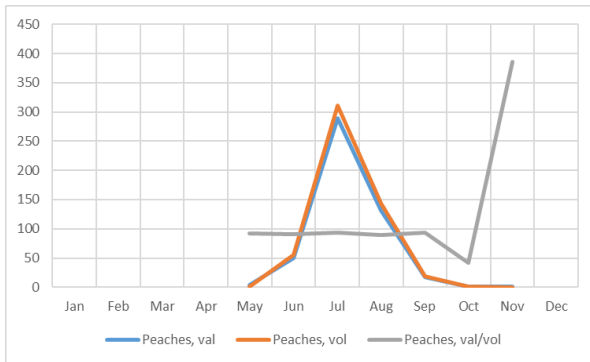
Peach import supply peaks corresponded to May-September period. The same period was associated with import unit price lows. On average, import unit prices ranged between 0.5-3.4 EUR/tons. (Figure 20, Table 33).

Figure 20. Romania nectarine import monthly indexes



Source: www.intracen.org, estimates

Table 33. Nectarine annual average import unit prices and volatility, Romania



	Mean	Volatility
Jan	2.2	0.3
Feb	1.8	0.3
Mar	1.8	0.3
Apr	1.6	0.1
May	1.1	0.1
Jun	0.6	0.2
Jul	0.5	0.2
Aug	0.5	0.2
Sept	0.6	0.2
Oct	0.6	0.2
Nov	3.1	1.6
Dec	3.4	0.3

Source: www.intracen.org, estimates

Greece, Turkey, and Germany have supplied 55%, 8%, and 6% of total nectarine imports to Romania's market, respectively.

Peaches

On average, [Georgia](#) exported 1.2 thousand tons of peaches worth of EUR 2.7 million; mean export unit price has been 0.6 EUR/kg. During the analysis period both volume and value of exports have discerned increasing pattern, approximating 14% and 10%, respectively; whereas export unit price trended downward, and growth rate was negative (-4%) (Table 34).

Table 34. Peaches annual exports, Georgia

	Peaches, val	Peaches, vol	Peaches, val/vol
2014	1,166	2,124,805	0.5
2015	327	667,316	0.4
2016	1,183	2,498,702	0.5
2017	1,282	3,998,682	1.0
2018	1,901	4,116,640	0.4
Mean	1,172	2,681,229	0.6
CAGR	10%	14%	-4%

Source: www.intracen.org, estimates

Peaches export season extended from May through November. Peak of supplies corresponded to July, and trough to September. Exports recovered during October-November, but still lagged compared to July. Peach export unit prices trended downward from May (0.8 EUR/kg) through October (0.3 EUR/kg), followed by increase in November (3.8 EUR/kg). Start and the end of export season were characterized with high volatility in export prices compared to the remaining period of marketing season. In general, larger export supplies corresponded to lower export unit price volatility (Figure 21, Table 35).

Figure 21. Georgia peach export monthly indexes

Source: www.intracen.org, estimates

Table 35. Peaches annual average export unit prices and volatility, Georgia

	Mean	Volatility
May	0.8	0.5
Jun	0.5	0.2
Jul	0.5	0.2
Aug	0.4	0.5
Sept	0.5	0.6
Oct	0.3	0.4
Nov	3.8	

Source: www.intracen.org, estimates

Major export destination of Georgia's peaches included Russia, Armenia, and Azerbaijan, and these markets

have absorbed about 96% of total exports from Georgia. The shares in total export supplies to Russia, Armenia, and Azerbaijan were 88%, 7%, and 1%, accordingly.

On average, on annual basis [Bulgaria](#) has imported 15 thousand tons of peaches worth of EUR 4 million; during the analysis period average import unit price approximated 0.5 EUR/kg. Value and volume of peach imports have increased by 5% and 9%, accordingly; while import unit prices declined by 18% (Table 36).

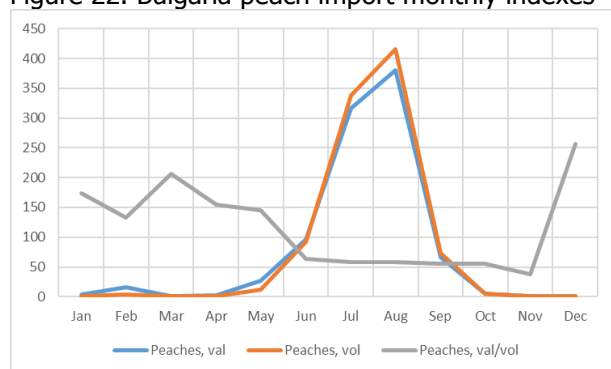
Table 36. Peaches annual imports, Bulgaria

	Peaches, val	Peaches, vol	Peaches, val/vol
2014	3,259	11,170,664	0.9
2015	3,425	11,161,034	0.4
2016	4,854	15,685,507	0.6
2017	5,047	20,303,292	0.4
2018	4,119	17,004,438	0.3
Mean	4,141	15,064,987	0.5
CAGR	5%	9%	-18%

Source: [www.intracen.org](#), estimates

Bulgaria has imported peaches throughout the year. Peak of imports corresponded to June-September period; during this period import unit prices were at their lowest level (0.3-0.7 EUR/kg); off-season import supplies corresponded to high import unit prices (1-2.2 EUR/kg) (Figure 22, Table 37).

Figure 22. Bulgaria peach import monthly indexes



Source: [www.intracen.org](#), estimates

Table 37. Peaches annual average import unit prices and volatility, Bulgaria

	Mean	Volatility
Jan	1.0	0.6
Feb	1.2	0.4
Mar	1.3	0.8
Apr	0.7	0.7
May	0.7	0.3
Jun	0.3	0.3
Jul	0.3	0.2

Aug	0.3	0.2
Sept	0.3	0.1
Oct	0.3	0.4
Nov	0.2	0.6
Dec	2.2	0.8

Source: [www.intracen.org](#), estimates

Major import suppliers of peaches to Bulgaria's market have been Greece, Germany, and Turkey. These import sources accounted for 88%, 5%, and 2% of total imports to Bulgaria, respectively.

Import supplies of peaches to [Romania](#) were characterized with an increasing pattern. Import value and volume increased by 33% and 1%, respectively, and the same time import unit value increased by 5%. Romania, annually, on average imported 15 thousand tons of peaches worth of EUR 8.6 million; average import unit price totaled 1.5 EUR/kg (Table 38).

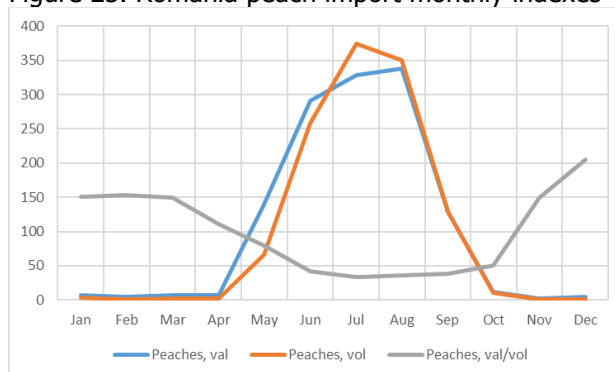
Table 38. Peaches annual imports, Romania

	Peaches, val	Peaches, vol	Peaches, val/vol
2014	2,914	9,368,034	1.2
2015	7,292	12,775,607	1.5
2016	9,701	15,324,575	1.8
2017	11,310	19,404,963	1.5
2018	11,953	16,474,118	1.5
Mean	8,634	14,669,459	1.5
CAGR	33%	12%	5%

Source: [www.intracen.org](#), estimates

Peak of Romania's peach import supplies corresponded to May-September period. Import unit prices have held inverse trend to that of the volume and value of import supplies. Import unit prices ranged between 0.5-3.1 EUR/kg (Figure 23, Table 39).

Figure 23. Romania peach import monthly indexes



Source: [www.intracen.org](#), estimates

Table 39. Peaches annual average import unit prices and volatility, Romania

	Mean	Volatility
Jan	2.3	0.4
Feb	2.3	0.3
Mar	2.2	0.2
Apr	1.7	0.2
May	1.2	0.1
Jun	0.6	0.2
Jul	0.5	0.2
Aug	0.5	0.2
Sept	0.6	0.2
Oct	0.7	0.2
Nov	2.2	0.5
Dec	3.1	0.2

Source: www.intracen.org, estimates

More than half of peach imports were supplied by Greece, Germany, and Turkey; these countries have accounted for 59%, 6%, and 5% of total imports of peaches.

Dried Fruits

Dried apricots

[Georgia](#) exports of dried apricots occurred only in 2017 and 2018. Average export volume was 0.35 tons valued at EUR 10 thousand; unit price totaled 16.4 EUR/kg. From 2017 to 2018 exports declined by 82% (Table 40).

Table 40. Dried apricot annual exports, Georgia

	Dried apricots, val	Dried apricots, vol	Dried apricots, val/vol
2017	10	676	16.4
2018		23	
Mean	10	350	16.4
CAGR		-82%	

Source: www.intracen.org, estimates

Dried apricot exports took place during May, September-October, and December. Exports in October were greater than during the other months. Prices in December were greater than in October, and totaled 18 EUR/kg and 15 EUR/kg, accordingly. Dried apricots were exported mainly to Russia. Small volumes were supplied to UAE and Armenian markets.

The value and volume of [Bulgaria's](#) dried apricot imports soared during the analysis period by 27% and 26%, accordingly; while import unit prices declined by 7%. Bulgaria, on average, annually, imported 200 tons of apricots worth of EUR 365 thousand; import unit prices totaled 2.5 EUR/kg (Table 41).

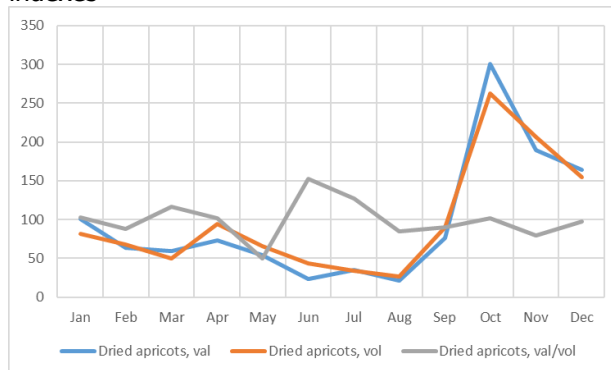
Table 41. Dried apricot annual imports, Bulgaria

	Dried apricots, val	Dried apricots, vol	Dried apricots, val/vol
2014	154	106,372	2.4
2015	333	129,158	3.1
2016	387	233,049	2.4
2017	448	197,850	2.7
2018	504	333,950	1.7
Mean	365	200,076	2.5
CAGR	27%	26%	-7%

Source: www.intracen.org, estimates

Bulgaria imported dried apricots throughout the year. Import peaks corresponded to October-January. Import unit prices discerned less fluctuation compared to import values and volumes. High import unit prices were derived for June-July (3.4-3.8 EUR/kg) and December-March (2.3-2.8 EUR/kg) periods (Figure 24, Table 42).

Figure 24. Bulgaria dried apricot import monthly indexes



Source: www.intracen.org, estimates

Table 42. Dried apricot annual average import unit prices and volatility, Bulgaria

	Mean	Volatility
Jan	2.4	0.6
Feb	2.3	0.8
Mar	2.8	0.6
Apr	2.4	0.4
May	1.2	0.8
Jun	3.8	0.7
Jul	3.4	0.7
Aug	2.1	0.7
Sept	2.1	0.5
Oct	2.5	0.3
Nov	1.9	0.4
Dec	2.3	0.6

Source: www.intracen.org, estimates

About 84% of total imports of dried apricots to Bulgaria originated from Turkey, Slovakia and Greece; these countries supplied to Bulgaria’s market about 65%, 4%, and 15% of total imports, respectively.

Romania’s dried apricot imports were characterized with an increasing pattern. The value, volume, and import unit prices soared by 12%, 19%, and 1%, accordingly. On average, Romania annually imported 297 tons of dried apricots worth of EUR 613 thousand. Average import unit price totaled 3.6 EUR/kg (Table 43).

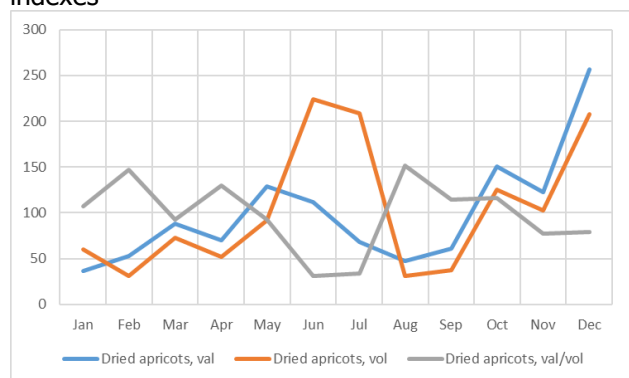
Table 43. Dried apricot annual imports, Romania

	Dried apricots, val	Dried apricots, vol	Dried apricots, val/vol
2014	491	228,735	2.7
2015	448	148,951	4.4
2016	640	252,558	4.0
2017	606	317,261	3.8
2018	882	536,806	2.8
Mean	613	296,862	3.6
CAGR	12%	19%	1%

Source: www.intracen.org, estimates

Dried apricot import peaks were estimated for May-July, and a December; Import unit prices peaks were derived for February, April, and August. Dried apricot import unit prices ranged between 1.1-4.8 EUR/kg (Figure 25, Table 44).

Figure 25. Romania dried apricot import monthly indexes



Source: www.intracen.org, estimates

Table 44. Dried apricot annual average import unit prices and volatility, Romania

	Mean	Volatility
Jan	3.6	0.6
Feb	5.4	0.5
Mar	3.5	0.5
Apr	4.8	0.4
May	3.3	0.5

Jun	1.1	0.4
Jul	1.1	0.7
Aug	5.3	0.4
Sept	4.2	0.5
Oct	3.8	0.5
Nov	2.8	0.4
Dec	2.8	0.2

Source: www.intracen.org, estimates

More than half of dried apricot imports to Romania were supplied by Turkey, Greece, and Italy; the proportion of these countries supplies in total imports totaled 52%, 7%, and 5%, accordingly.

Dried Prunes

On average, value and volume of dried prune exports from Georgia approximated EUR 16 thousand and 1.8 tons. Unit export price was 10 EUR/kg. Dried prune exports trended upward during the observation period. Volume and value of exports increased by 60% and 48%, respectively, and export unit prices by 5% (Table 45).

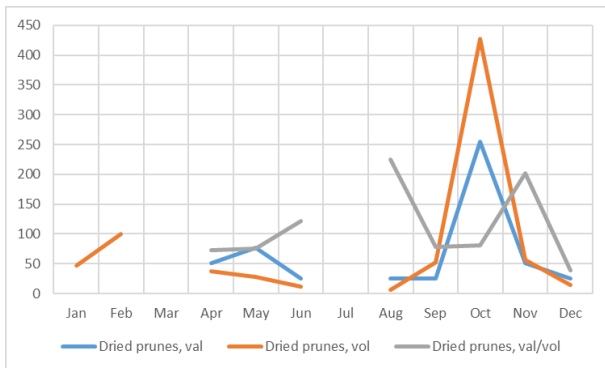
Table 45. Dried prunes annual exports, Georgia

	Dried prunes, val	Dried prunes, vol	Dried prunes, val/vol
2014	5	701	7.1
2015		4	
2016		2	
2017	9	715	15.0
2018	35	7,387	9.1
Mean	16	1,762	10.4
CAGR	48%	60%	5%

Source: www.intracen.org, estimates

Dried prune exports were recorded throughout the year with the exception of March and July months. Peak of exports were in October, and the troughs in June, August, and December. Highest prices were in August (20 EUR/kg), November (18.3 EUR/kg), and June (11 EUR/kg), and the lowest prices in January (3.8 EUR/kg) and December (3.5 EUR/kg) (Figure 26, Table 46).

Figure 26. Georgia dried prune export monthly indexes



Source: www.intracen.org, estimates

Table 46. Dried prunes annual average export unit price and volatility, Georgia

	Mean	Volatility
Jan	3.8	0.4
Apr	6.6	0.4
May	6.9	0.4
Jun	11.0	0.4
Aug	20.4	0.4
Sept	7.1	0.4
Oct	8.7	0.7
Nov	18.3	0.4
Dec	3.5	0.4

Source: www.intracen.org, estimates

Most of the dried prune exports were supplied to German market. Relatively small quantities were supplied to Russian and the United States markets.

[Bulgaria's](#) imports of dried prunes were characterized with an increasing pattern; value and volume of import supplies soared by 7% and 9%, accordingly, while import unit prices dropped by 17%. On annual basis, Bulgaria imported 929 tons of dried prunes worth of EUR 1.2 million; import unit prices were 2.5 EUR/kg. Imports of dried prunes were supplied to Bulgaria's market throughout the year (Table 47).

Table 47. Dried prunes annual imports, Bulgaria

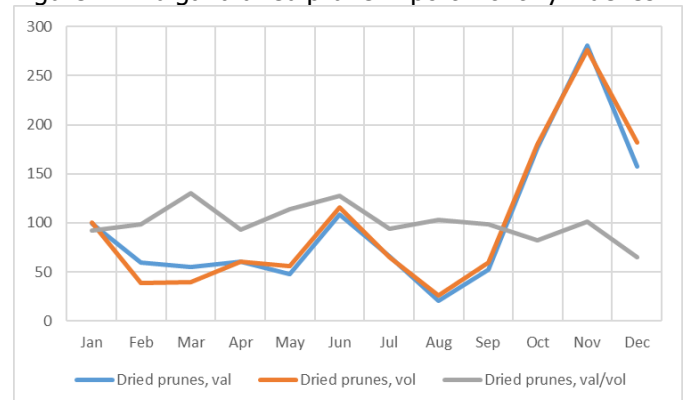
	Dried prunes, val	Dried prunes, vol	Dried prunes, val/vol
2014	1,164	803,497	4.8
2015	816	550,119	3.1
2016	878	800,792	1.1
2017	1,609	1,236,250	1.3
2018	1,634	1,253,396	1.9
Mean	1,220	928,811	2.5
CAGR	7%	9%	-17%

Source: www.intracen.org, estimates

Supply peaks corresponded to October-December period. Import unit prices were considerably less

volatile compared to the volume and value of imports. Import unit prices ranged between 1.2 EUR/kg in December to 3.4 EUR/kg in June (Figure 27, Table 48).

Figure 27. Bulgaria dried prune import monthly indexes



Source: www.intracen.org, estimates

Table 48. Dried prunes annual average import unit prices and volatility, Bulgaria

	Mean	Volatility
Jan	2.0	0.8
Feb	3.0	0.9
Mar	3.5	1.0
Apr	2.7	1.1
May	3.3	0.9
Jun	3.4	0.8
Jul	1.9	0.8
Aug	3.0	1.0
Sept	2.0	1.1
Oct	1.4	0.2
Nov	1.7	0.4
Dec	1.2	0.2

Source: www.intracen.org, estimates

Proportions of Moldova, Serbia, and Chile supplies in Bulgaria's total imports of dried prunes were 49%, 27%, and 9%, accordingly. These three countries accounted for about 86% of total imports of dried prunes.

[Romania's](#) imports of dried prunes were characterized with an increasing pattern; Import value, volume and unit prices have increased by 18%, 14%, and 5%, accordingly. On average, Romania annually imported 1.1 thousand tons of dried prunes worth of EUR 1.7 million; average unit import price was 2 EUR/kg (Table 49).

Table 49. Dried prunes annual imports, Romania

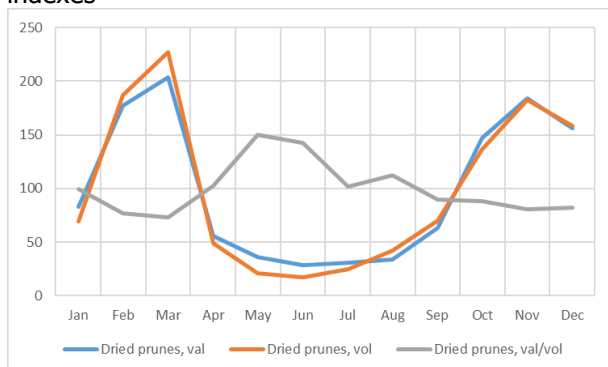
	Dried prunes, val	Dried prunes, vol	Dried prunes, val/vol
2014	1,033	685,960	1.8

2015	1,317	721,034	2.5
2016	1,817	1,424,523	1.5
2017	1,842	1,105,242	1.8
2018	2,356	1,337,425	2.3
Mean	1,673	1,054,837	2.0
CAGR	18%	14%	5%

Source: www.intracen.org, estimates

Dried prune imports trough corresponded to April-September period, and the peak to October-November, and February-March. Import unit prices peak coincided with import supply trough. Import unit prices ranged from 1.4-3 EUR/kg (Figure 28, Table 50).

Figure 28. Romania dried prune import monthly indexes



Source: www.intracen.org, estimates

Table 50. Dried prunes annual average import unit prices and volatility, Romania

	Mean	Volatility
Jan	1.9	0.2
Feb	1.5	0.1
Mar	1.4	0.2
Apr	2.1	0.5
May	3.0	0.2
Jun	2.9	0.3
Jul	2.0	0.5
Aug	2.4	0.9
Sept	1.8	0.5
Oct	1.7	0.2
Nov	1.6	0.1
Dec	1.6	0.2

Source: www.intracen.org, estimates

Moldova, Serbia, and Poland were major importers of dried prunes to Romania. The share of these countries supplies in total imports were 40%, 18%, and 12%, accordingly.

Dried apples

On average, during the analysis period, [Georgia](#) annually exported 232 tons of dried apples worth of

EUR 416 thousand. Export unit price was 2.5 EUR/kg. Exports of dried apples were characterized with an increasing pattern. Volume and value of exports increased by 13% and 15%, accordingly, and export unit prices by 3% (Table 51).

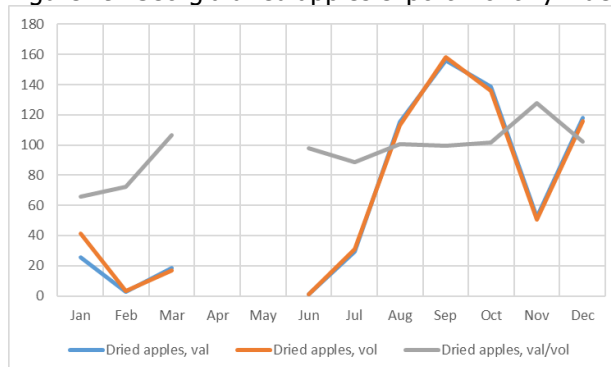
Table 51. Dried apples annual exports

	Dried apples, val	Dried apples, vol	Dried apples, val/vol
2014	292	176,837	1.7
2015	341	184,880	1.8
2016	353	191,920	1.8
2017	496	283,940	1.6
2018	596	324,274	2.0
Mean	416	232,370	1.8
CAGR	15%	13%	3%

Source: www.intracen.org, estimates

Dried apples were exported throughout the year with the exception of April-May period. Peak of supplies was in September, and in general, exports during August-October were greater than during the rest of the year. Export unit prices peaked in November (2.3 EUR/kg). Export unit price troughs were in the beginning of the year (1.2-1.4 EUR/kg) (Figure 29, Table 52).

Figure 29. Georgia dried apples export monthly indexes



Source: www.intracen.org, estimates

Table 52. Dried apples annual average export unit price and volatility, Georgia

	Mean	Volatility
Jan	1.2	0.7
Feb	1.4	0.4
Mar	1.8	0.4
Jun	1.9	0.4
Jul	1.8	0.4
Aug	1.8	0.0
Sept	1.8	0.1
Oct	1.8	0.0
Nov	2.3	0.6
Dec	1.8	0.0

Source: www.intracen.org, estimates

Dried apples were mainly exported to Germany (99%), and only insignificant quantities were supplied to Russian and Polish markets.

Value of [Bulgaria's](#) imports of dried apples was characterized with an increasing pattern (2%), while the volume trended downward by 17%. Import unit prices soared by 47%. Bulgaria, on average, annually imported 503 tons of dried apples worth of EUR207 thousand, and average import unit price was 1.1 EUR/kg (Table 53).

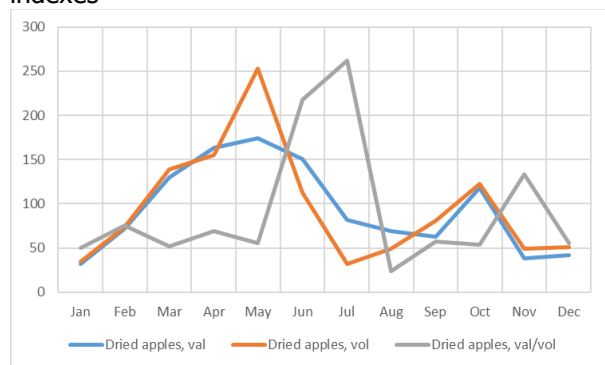
Table 53. Dried apple annual imports, Bulgaria

	Dried apples, val	Dried apples, vol	Dried apples, val/vol
2014	106	396,520	0.2
2015	222	726,925	0.3
2016	417	731,202	1.7
2017	174	501,198	1.6
2018	117	160,001	1.7
Mean	207	503,169	1.1
CAGR	2%	-17%	47%

Source: www.intracen.org, estimates

Dried apples were imported throughout the year. Import supply peak corresponded to February-July period and October. Import unit price peaks were during June-July (3.1-3.8 EUR/kg) and November (2 EUR/kg). Import unit prices similar to import value and volume were characterized with a considerable volatility (Figure 30, Table 54).

Figure 30. Bulgaria dried apples import monthly indexes



Source: www.intracen.org, estimates

Table 54. Dried apple annual average import unit prices and volatility, Bulgaria

	Mean	Volatility
Jan	0.4	0.6
Feb	0.4	0.2
Mar	0.3	0.5
Apr	0.8	1.3

May	0.4	0.6
Jun	3.1	1.3
Jul	3.8	0.9
Aug	0.4	0.6
Sept	0.5	1.3
Oct	0.7	1.0
Nov	2.0	1.6
Dec	0.3	0.6

Source: www.intracen.org, estimates

About the half of Bulgaria's imports of dried apples originated in Germany, Greece, and Albania; these countries have accounted 21%, 21%, and 3% of total imports of dried apples by Bulgaria.

[Romania's](#) imports of dried apples soared during the analysis period. Import value, volume, and unit prices increased by 22%, 3%, and 13%, accordingly. On average, Romania, annually imported 6.9 thousand tons of dried apples worth of EUR 2.3 million; average import unit price was 0.4 EUR/kg (Table 55).

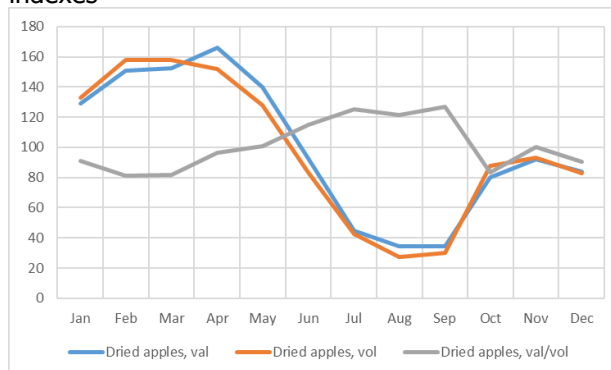
Table 55. Dried apples annual imports, Romania

	Dried apples, val	Dried apples, vol	Dried apples, val/vol
2014	1,104	3,756,165	0.3
2015	1,494	6,392,871	0.3
2016	2,790	10,494,475	0.3
2017	3,194	9,678,912	0.4
2018	3,038	4,394,244	0.6
Mean	2,324	6,943,333	0.4
CAGR	22%	3%	13%

Source: www.intracen.org, estimates

Dried apple import supply peak corresponded to October-May period. Import unit price highs coincided with import supply troughs. Import unit prices ranged between 0.3-0.5 EUR/kg (Figure 31, Table 56).

Figure 31. Romania dried apples import monthly indexes



Source: www.intracen.org, estimates

Table 56. Dried apples annual average import unit price and volatility, Romania

	Mean	Volatility
Jan	0.3	0.6
Feb	0.3	0.5
Mar	0.3	0.4
Apr	0.4	0.4
May	0.3	0.5
Jun	0.4	0.5
Jul	0.4	0.5
Aug	0.5	0.6
Sept	0.4	0.5
Oct	0.3	0.3
Nov	0.3	0.5
Dec	0.3	0.2

Source: www.intracen.org, estimates

Major import suppliers of dried apples included Poland, Italy, and Hungary; these countries have imported 63%, 15%, and 9% of total imports to Romania.

Dried peaches

Georgia exported dried peaches only in 2018. The value and volume of exports were EUR 34 thousand and 1.2 tons, respectively. Export unit price was 35 EUR/kg (Table 57)

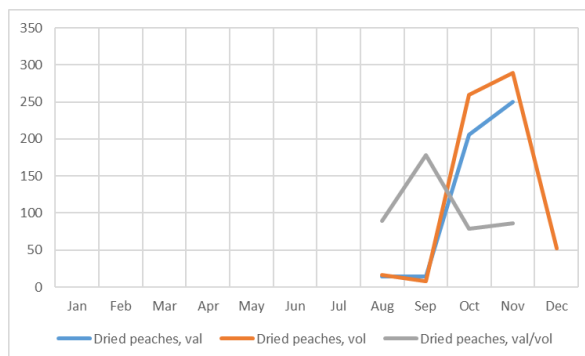
Table 57. Dried peaches annual exports, Georgia

	Dried peaches, val	Dried peaches, vol	Dried peaches, val/vol
2014		1	
2018	34	1,167	35.1
Mean	34	584	35.1
CAGR		311%	

Source: www.intracen.org, estimates

Dried peaches were exported during August-December period. Export peaks corresponded to October-November, and a trough to August-September period. Export unit prices were higher in the beginning of export season. Peak export unit prices, 62.5 EUR/kg was recorded in September, and trough export unit price in June 24 EUR/kg (Figure 32, Table 58).

Figure 32. Georgia dried peaches export monthly indexes



Source: www.intracen.org, estimates

Table 58. Dried peaches annual average export unit prices and volatility, Georgia

	Mean	Volatility
Jun	23.8	0.4
Aug	31.3	0.4
Sept	62.5	0.4
Oct	27.8	0.4
Nov	30.2	0.4

Source: www.intracen.org, estimates

Dried peaches were mainly supplied to Russian market. Very small volume was supplied to Belgium market.

The value of [Bulgaria's](#) imports of dried peaches has declined by 3%, while the volume increased by 7%; import unit prices dropped by 16%. Annually, Bulgaria imported about 3.5 thousand tons of dried peaches, worth of EUR 723 thousand, and average import unit price was 0.3 EUR/kg (Table 59).

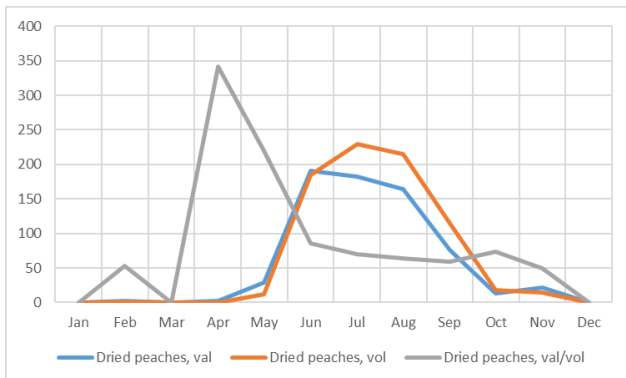
Table 59. Dried peaches annual imports

	Dried peaches, val	Dried peaches, vol	Dried peaches, val/vol
2014	1,008	3,467,098	0.4
2015	251	1,523,512	0.2
2016	913	4,140,903	0.4
2017	581	3,552,516	0.3
2018	862	4,931,822	0.2
Mean	723	3,523,170	0.3
CAGR	-3%	7%	-16%

Source: www.intracen.org, estimates

Dried peaches were imported throughout the year. Import supply peak corresponded to June-September period, and import unit price high was April-May (0.7-1.5 EUR/kg). During the rest of the months, import unit prices were in the range of 0.2 EUR/kg (Figure 33, Table 60).

Figure 33. Bulgaria dried peaches import monthly indexes



Source: www.intracen.org, estimates

Table 60. Dried peaches annual average import unit prices and volatility, Bulgaria

	Mean	Volatility
Jan		
Feb	0.2	0.4
Mar		
Apr	1.5	0.4
May	0.7	0.6
Jun	0.2	0.4
Jul	0.2	0.3
Aug	0.2	0.4
Sept	0.2	0.2
Oct	0.2	0.4
Nov	0.2	0.4
Dec		

Source: www.intracen.org, estimates

About 99% of total imports of dried peaches to Bulgaria came from Greece, Germany, and Armenia; these countries have accounted for 78%, 21% and less than 1% of total import supplies, accordingly.

[Romania's](#) imports of dried peaches were characterized with an increasing pattern; the value, volume, and unit prices have increased by 15%, 10%, and 11%, accordingly. On average, Romania, annually imported 6 thousand tons of dried peaches worth of EUR 2.4 million; import unit price totaled 1.5 EUR/kg (Table 61).

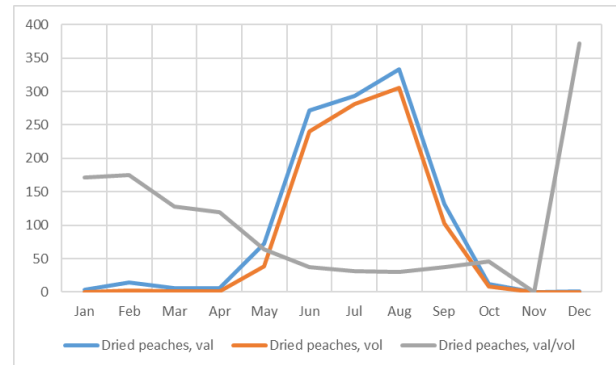
Table 61. Dried peaches annual imports, Romania

	Dried peaches, val	Dried peaches, vol	Dried peaches, val/vol
2014	1,266	3,104,378	0.9
2015	1,925	7,171,026	2.1
2016	2,878	7,707,834	1.4
2017	3,482	7,428,779	1.7
2018	2,548	4,977,963	1.5
Mean	2,420	6,077,996	1.5
CAGR	15%	10%	11%

Source: www.intracen.org, estimates

Dried peach import supply peak corresponded to May-September period. Prices during December-April, were considerably higher than during the rest of the months. Average import unit prices ranged between 0.4-5.7 EUR/kg (Figure 34, Table 62).

Figure 34. Romania dried peaches import monthly indexes



Source: www.intracen.org, estimates

Table 62. Dried peaches annual average import unit prices and volatility, Romania

	Mean	Volatility
Jan	2.8	
Feb	2.6	0.6
Mar	2.0	
Apr	1.8	0.6
May	0.9	0.3
Jun	0.5	0.1
Jul	0.4	0.2
Aug	0.4	0.2
Sept	0.5	0.2
Oct	0.7	0.4
Dec	5.7	

Source: www.intracen.org, estimates

Major importers of dried peaches to Romania's market were Greece, Italy, and Spain. These countries have imported 65%, 13% and 4% of total imports, respectively.

Dried pears

On average, [Georgia](#) annually exported 4 tons of dried pears worth of EUR 8 thousand. Export unit price was 2 EUR/kg. Exports of dried pears were characterized with a declining pattern. The value and volume of exports declined by 13% and 22%, accordingly, while export unit prices increased by 11% (Table 63).

Table 63. Dried pears annual exports, Georgia

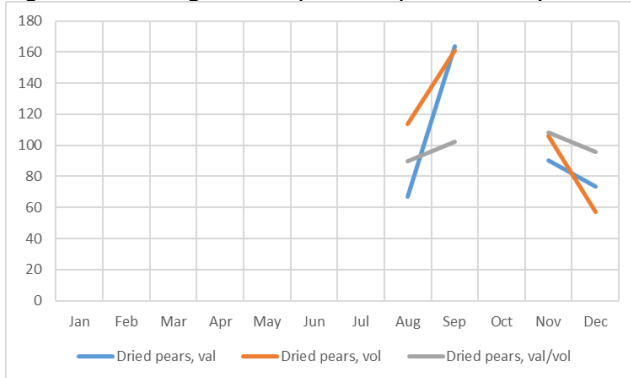
	Dried pears, val	Dried pears, vol	Dried pears, val/vol
2014	6	4,000	1.5

2015	3	1,350	2.2
2016	8	4,635	1.7
2017	21	10,755	2.0
2018	3	1,162	2.5
Mean	8	4,380	2.0
CAGR	-13%	-22%	11%

Source: www.intracen.org, estimates

Dried pears were exported during August-September and November-December. Exports in the end of summer were higher than during the winter. Export unit prices were roughly at the same level, and fluctuated between 1.9-2.3 EUR/kg (Figure 25, Table 64).

Figure 35. Georgia dried pears export monthly indexes



Source: www.intracen.org, estimates

Table 64. Dried pears annual average export unit prices and volatility

	Mean	Volatility
Mar	1.9	
Aug	2.3	0.4
Sept	1.9	0.5
Oct		
Nov	2.2	0.6
Dec	1.9	

Source: www.intracen.org, estimates

Dried pears were mainly supplied to German market (80%); the other important market was Russia, where about 20% of total exports were shipped.

[Bulgaria's](#) imports of dried pears have soared during the analysis period. The volume, value, and import unit prices have increased by 44%, 26%, and 5%, accordingly. On average, Bulgaria annually imported 1.1 thousand tons of dried pears worth of EUR 576 thousand; import unit prices on average were 0.6 EUR/kg (Table 65)

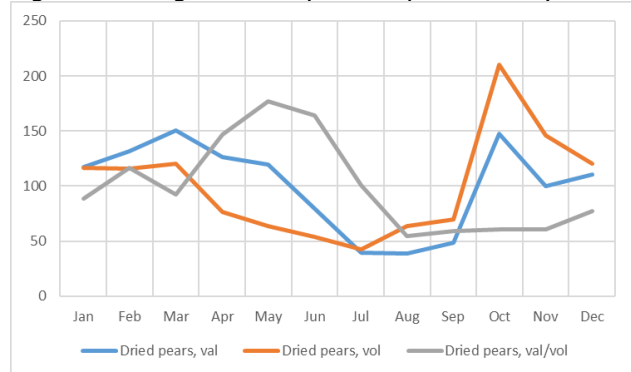
Table 65. Dried pears annual imports, Bulgaria

	Dried pears, val	Dried pears, vol	Dried pears, val/vol
2014	125	492,397	0.4
2015	204	490,798	0.6
2016	821	1,225,116	0.7
2017	961	1,549,882	0.6
2018	771	1,557,391	0.5
Mean	576	1,063,117	0.6
CAGR	44%	26%	5%

Source: www.intracen.org, estimates

Bulgaria imported dried pears throughout the year. Supply peak corresponded to October-May period. Import unit price highs were derived for April-June period (0.8-1 EUR/kg) (Figure 36, Table 66).

Figure 36. Bulgaria dried pears import monthly indexes



Source: www.intracen.org, estimates

Table 66. Dried pears annual average import unit prices and volatility, Bulgaria

	Mean	Volatility
Jan	0.5	0.4
Feb	0.6	0.3
Mar	0.6	0.6
Apr	0.8	0.1
May	1.0	0.1
Jun	0.9	0.6
Jul	0.6	0.5
Aug	0.3	0.5
Sept	0.3	0.2
Oct	0.3	0.3
Nov	0.4	0.4
Dec	0.4	0.3

Source: www.intracen.org, estimates

Netherlands, Greece, and Italy have supplied about 44%, 30%, and 18%, of total imports of dried pears to Bulgaria's market, accordingly.

[Romania](#), on annual basis, on average imported 2.6 thousand tons of dried pears worth of EUR 1.99 million,

and import unit prices were 0.8 EUR/kg. The value of Romania's imports of dried pears increased by 2%, while the volume declined by 10%; the same time, import unit prices increased by 14% (Table 67).

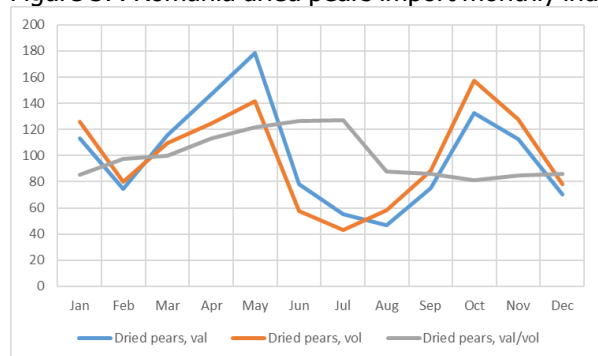
Table 67. Dried pears annual imports, Romania

	Dried pears, val	Dried pears, vol	Dried pears, val/vol
2014	1,447	2,557,716	0.6
2015	2,000	2,985,499	0.7
2016	2,296	3,051,917	0.8
2017	2,595	2,856,688	0.9
2018	1,628	1,547,912	1.1
Mean	1,993	2,599,946	0.8
CAGR	2%	-10%	14%

Source: www.intracen.org, estimates

Dried pears imports highs were during March-May, and October-November, and the trough during June-September. Import unit prices during January-July were greater than during the rest of the months. Dried pears import unit prices ranged between 0.7-1 EUR/kg (Figure 37, Table 68).

Figure 37. Romania dried pears import monthly indexes



Source: www.intracen.org, estimates

Table 68. Dried pears annual average import unit prices and volatility, Romania

	Mean	Volatility
Jan	0.7	0.2
Feb	0.8	0.3
Mar	0.8	0.3
Apr	0.9	0.2
May	1.0	0.2
Jun	1.0	0.2
Jul	1.1	0.4
Aug	0.7	0.5
Sept	0.7	0.4
Oct	0.7	0.5
Nov	0.7	0.3
Dec	0.7	0.2

Source: www.intracen.org, estimates

Italy, Netherlands, and Greece together have accounted for 88% of dried pears total imports to Romania. Individually these countries shares were 53%, 27%, and 9%, accordingly.

Juices

Georgia's average annual exports of juices in value and volume terms were EUR 3 million, and 3 thousand tons. Export unit price approximated 1.1 EUR/l. Exports of juices trended downward, and the value and volume declined by 1% and 3%, accordingly; however, export unit prices soared by 2%. Juices were exported throughout the year (Table 69).

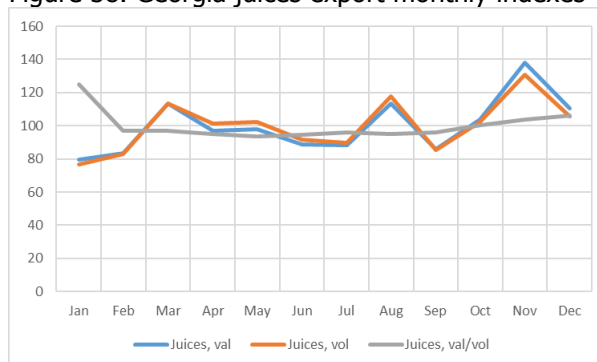
Table 69. Juices annual exports, Georgia

	Juices, val	Juices, vol	Juices, val/vol
2014	3,007	3,229,660	0.9
2015	3,763	3,349,041	1.1
2016	3,191	2,923,762	1.2
2017	3,227	2,935,477	1.1
2018	2,888	2,715,426	1.1
Mean	3,215	3,030,673	1.1
CAGR	-1%	-3%	2%

Source: www.intracen.org, estimates

Notable supply peaks were estimated for March, August, and November, while peak export unit prices were derived for January. Overall, juice export unit prices ranged between 1-1.4 EUR/kg (Figure 38, Table 70).

Figure 38. Georgia juices export monthly indexes



Source: www.intracen.org, estimates

Juice export unit prices were stable throughout the year and ranged between 1-1.1 EUR/l with the exception of January, when average price was 1.4 EUR/l. January prices also were characterized with notable variability (Table 70).

Table 70. Juice annual average export unit prices and volatility

	Mean	Volatility
Jan	1.4	0.5
Feb	1.1	0.1
Mar	1.1	0.1
Apr	1.0	0.1
May	1.0	0.1
Jun	1.0	0.1
Jul	1.0	0.1
Aug	1.0	0.1
Sept	1.0	0.1
Oct	1.1	0.1
Nov	1.1	0.1
Dec	1.1	0.1

Source: www.intracen.org, estimates

Main export markets of juices included the United States, Australia and Greece, and proportions of Georgia’s export sales into these markets were 48%, 12%, and 11%, accordingly.

On average, on annual basis, [Bulgaria](#) imported 573 tons of juices worth of EUR 912 thousand; import unit prices on average were 1.8 EUR/l. Juice imports during the analysis period soared; value of imports increased by 8%, volume by 3%, and import unit prices by 4% (Table 71).

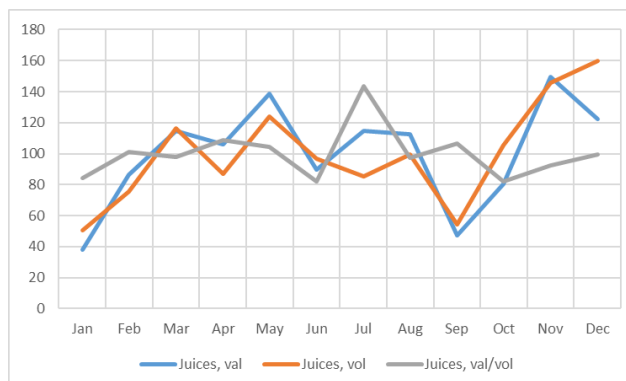
Table 71. Juices annual imports, Bulgaria

	Juices, val	Juices, vol	Juices, val/vol
2014	795	521,612	1.8
2015	915	646,290	1.7
2016	872	570,068	1.9
2017	818	530,842	1.6
2018	1,158	594,622	2.1
Mean	912	572,687	1.8
CAGR	8%	3%	4%

Source: www.intracen.org, estimates

Juice imports were characterized with a notable fluctuation throughout the year. Import supply highs were obtained for March, July, and November. Average import unit prices ranged between 1.5-2.7 EUR/l (Figure 39, Table 72).

Figure 39. Bulgaria juices import monthly indexes



Source: www.intracen.org, estimates

Table 72. Juices annual average import unit prices and volatility, Bulgaria

	Mean	Volatility
Jan	1.5	0.7
Feb	1.9	0.2
Mar	1.8	0.4
Apr	2.0	0.4
May	2.0	0.4
Jun	1.5	0.4
Jul	2.7	0.6
Aug	1.8	0.3
Sept	2.0	0.6
Oct	1.5	0.6
Nov	1.7	0.2
Dec	1.7	0.6

Source: www.intracen.org, estimates

Nearly the half of Bulgaria’s juice imports originated from Turkey, Germany, and Poland; these countries have accounted for about 24%, 16%, and 8% of total Bulgaria’s imports, accordingly.

The value and volume of [Romania’s](#) juice imports soared during the analysis period, and totaled 18% and 19%, accordingly; the same time import unit prices dropped by 1%. In general, annually Romania imported 2.4 thousand tons of juices worth of EUR 3.3 million. Average import unit price approximated 1.5 EUR/l (Table 73).

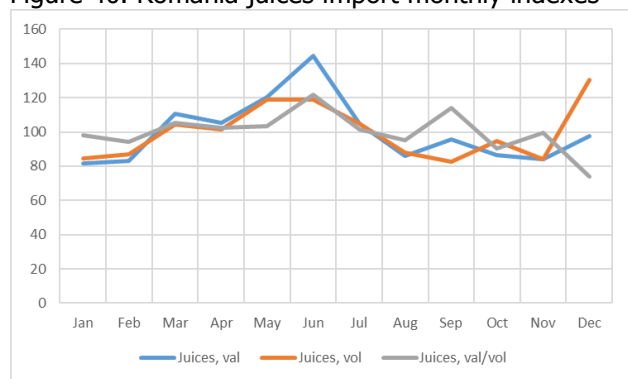
Table 73. Juices annual imports, Romania

	Juices, val	Juices, vol	Juices, val/vol
2014	2,042	1,367,735	1.5
2015	2,508	1,504,713	1.7
2016	3,144	2,198,764	1.4
2017	3,983	3,398,120	1.2
2018	4,622	3,300,828	1.5
Mean	3,260	2,354,032	1.5
CAGR	18%	19%	-1%

Source: www.intracen.org, estimates

Juice imports were not characterized with any particular trend. Import highs were in June and December, and lows in January and during August-November. Import unit prices fluctuated between 1.1-1.8 EUR/l (Figure 40, Table 74).

Figure 40. Romania juices import monthly indexes



Source: www.intracen.org, estimates

Table 74. Juices annual average import unit prices and volatility, Romania

	Mean	Volatility
Jan	1.4	0.3
Feb	1.4	0.3
Mar	1.5	0.2
Apr	1.5	0.1
May	1.5	0.3
Jun	1.8	0.3
Jul	1.5	0.2
Aug	1.4	0.3
Sept	1.7	0.1
Oct	1.3	0.1
Nov	1.4	0.1
Dec	1.1	0.2

Source: www.intracen.org, estimates

Major import suppliers of juices were Germany, Netherlands, and Italy. These countries individually have accounted for 21%, 11% and 6% of total imports of juices to Romania.

Wine grape spirits

Georgia, on average, annually exported about 30 thousand tons of grape spirits worth of EUR 64 million. 5-year average export unit price has been 2.2 EUR/l. Exports of grape spirits were characterized with an increasing trend. The value and volume of exports have increased by 13% and 15%, respectively; the same time export unit price declined by 3% (table 75).

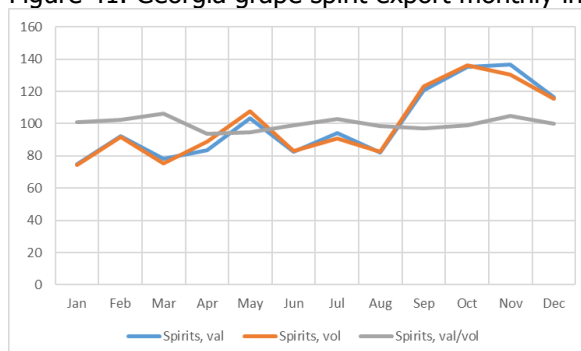
Table 75. Grape spirits annual exports

	Spirits, val	Spirits, vol	Spirits, val/vol
2014	49,313	22,032,658	2.3
2015	36,255	14,869,092	2.5
2016	61,258	29,981,158	2.0
2017	83,831	40,365,134	2.1
2018	88,865	45,067,783	2.0
Mean	63,904	30,463,165	2.2
CAGR	13%	15%	-3%

Source: www.intracen.org, estimates

Grape spirit have been exported throughout the year. Export peaks corresponded to September-December period, and a February and May. Grape spirit export unit prices were not characterized with notable fluctuation; export unit prices ranged between 2-2.3 EUR/l. Overall, more spirits were exported during the second half of the year compared to the first half (Figure 41, Table 76).

Figure 41. Georgia grape spirit export monthly indexes



Source: www.intracen.org, estimates

Table 76. Grape spirits annual average export unit prices and volatility, Georgia

	Mean	Volatility
Jan	2.2	0.1
Feb	2.2	0.2
Mar	2.3	0.2
Apr	2.0	0.1
May	2.1	0.1
Jun	2.1	0.1
Jul	2.2	0.1
Aug	2.1	0.1
Sept	2.1	0.1
Oct	2.1	0.1
Nov	2.3	0.1
Dec	2.2	0.1

Source: www.intracen.org, estimates

Major export destinations of Georgian grape spirits have been Ukraine, Russia, and France; these markets have accounted about 26%, 22% and 14% of total exports of grape spirits.

Bulgaria's imports of grape spirits has been characterized with an increasing pattern. The value and volume of imports increased by 6% and 11%, respectively; however, import unit prices declined by 5%. Bulgaria on average, annually imported 198 tons of grape spirits worth of EUR 1.4 million. Import unit price has been 10 EUR/l (Table 77).

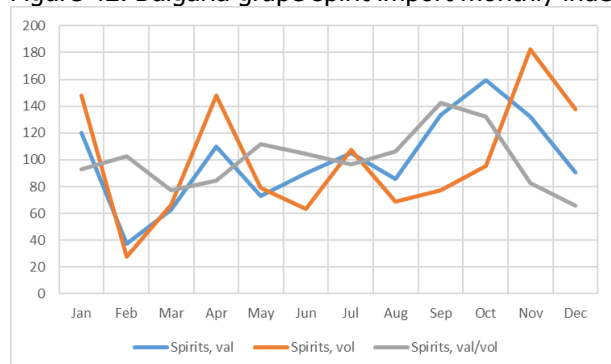
Table 77. Grape spirits annual imports, Bulgaria

	Spirits, val	Spirits, vol	Spirits, val/vol
2014	1,171	139,592	11.3
2015	1,323	142,674	12.5
2016	1,543	344,182	9.5
2017	1,237	129,717	10.4
2018	1,577	236,764	8.5
Mean	1,370	198,586	10.4
CAGR	6%	11%	-5%

Source: www.intracen.org, estimates

Bulgaria has imported grape spirits throughout the year. Import peaks correspond to January, April, July, and November. In general prices have been higher during August-October compared to other months. Import unit prices ranged between 7.2 EUR/l in December to 11.4 EUR/l in June (Figure 42, Table 78).

Figure 42. Bulgaria grape spirit import monthly indexes



Source: www.intracen.org, estimates

Table 78. Grape spirits annual average import unit prices and volatility, Bulgaria

	Mean	Volatility
Jan	9.8	0.5
Feb	10.7	0.3
Mar	8.2	0.4
Apr	9.2	0.7
May	11.0	0.4
Jun	11.4	0.6
Jul	9.8	0.4
Aug	11.5	0.4
Sept	14.4	0.2

Oct	13.8	0.3
Nov	8.4	0.7
Dec	7.2	0.8

Source: www.intracen.org, estimates

Main import suppliers of grape spirits were Turkey, Germany, and Poland in a descending order of importance; these countries accounted for 24%, 16%, and 8% of total imports of Bulgaria, accordingly.

Import supplies of grape spirits in Romania were characterized with an increasing pattern; the value and volume of supplies have increased by 25% and 24%, accordingly; however, import unit prices dropped by 2%. Romania, on average, annually, imported 338 tons of grape spirits worth of EUR 979 thousand. Average import unit prices of imported grape spirits totaled 3.8 EUR/l (Table 79).

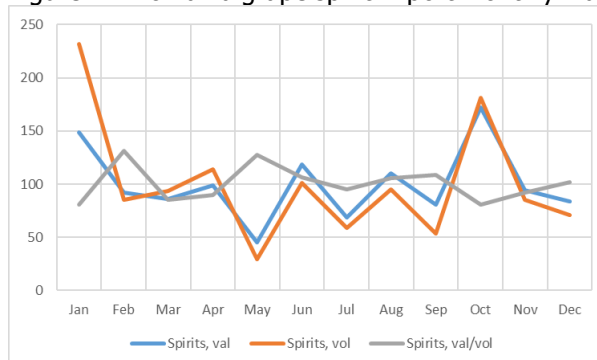
Table 79. Grape spirits annual imports, Romania

	Spirits, val	Spirits, vol	Spirits, val/vol
2014	489	123,040	4.7
2015	587	204,037	3.3
2016	934	556,803	3.3
2017	1,394	443,944	3.7
2018	1,492	363,835	4.2
Mean	979	338,332	3.8
CAGR	25%	24%	-2%

Source: www.intracen.org, estimates

Throughout the year, Romania's imports of grape spirits were not characterized with any particular trend. Import peaks were derived for January, April, June, August, and October. Import price pattern was flatter compared to import volume and value. Import unit prices ranged between 3.2-4.9 EUR/l (Figure 42, Table 80).

Figure 42. Romania grape spirit import monthly indexes



Source: www.intracen.org, estimates

Table 80. Grape spirits annual average import unit prices and volatility

	Mean	Volatility
Jan	3.2	0.5
Feb	4.9	0.6
Mar	3.3	0.2
Apr	3.4	0.6
May	4.9	0.1
Jun	4.3	0.5
Jul	3.6	0.3
Aug	4.1	0.3
Sept	4.1	0.1
Oct	3.1	0.2
Nov	3.5	0.2
Dec	3.8	0.2

Source: www.intracen.org, estimates

Nearly the half of grape spirit imports originated from Spain, Germany, and Moldova; these countries have accounted for 19%, 17%, and 8% of total imports, respectively.

EU import requirements

Georgia has been in the process of approximation its SPS legislation with the EU Acquis. All companies supplying export markets have

Berries

Quality

Codex Alimentarius, the 'food code' of the World Health Organization (WHO) and the Food and Agriculture Organization (FAO), and the United Nations Economic Commission for Europe (UNECE) provide the following information on different quality requirements for berries:

- Marketing standard for fresh cape gooseberries (Codex Alimentarius)
- Marketing standard for quick frozen (IQF) raspberries, blueberries, bilberries
- <http://www.fao.org/fao-who-codexalimentarius/codex-texts/list-standards/en/>
- Marketing standard for berry fruit in general (UNECE)
https://www.unece.org/fileadmin/DAM/trade/agr/standard/standard/fresh/FFV-Std/English/57_BerryFruits.pdf

- The General Marketing Standards of Regulation (EU) 543/2011 <https://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2011:157:0001:0163:EN:PDF>

At the very least, berries have to be of a uniform color, have similar varietal characteristics, be clean and free from extraneous vegetable material and be practically free from unripe berries. Visual defects (for example unripe or damaged fruit) in a sample are evaluated according to the rating system in the Codex standard. As long as the amount of points does not exceed the threshold, the product is approved as provided in the Codex Alimentarius.

Size and packaging

The package shall protect against risks such as contamination, leakage and dehydration. Also, further information on packaging is provided by Recommended International Code of Practice for Packaging and Transport of Tropical Fresh Fruits and Vegetables (CAC/RCP 44-1995) at http://www.fao.org/ag/agn/CDfruits_en/others/docs/CAC-RCP44-1995.PDF

Labelling

Consumer package labelling must comply with the rules and regulations that apply in the European market. Labels cannot contain any toxic ink or glue.

If the nature of the produce is not visible from the outside, the package must be labelled with the name of the product, the (optional) name of the variety and/or the commercial name. The following items should be on the label of (pre-packed) fresh fruits:

- The name under which the product is sold
- The commercial identification: class, size (code), number of units, net weight
- The name and address of the producer
- The place/country of origin.
- In case of frozen products, the term 'frozen' or 'solid frozen' has to appear on the label.

Also, there is a Codex General Standard for the Labelling of Pre-Packaged Foods (CODEX STAN 1-1985) or Regulation (EU) No. 1169/2011 on the provision of food information to consumers, including labelling of pre-packaged food sold on the European market at <https://eurlex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2011:304:0018:0063:EN:PDF>

Minimum pesticide residues

Pesticide residues constitute a crucial issue for suppliers of berries. With the aim of avoiding health

and environmental damage, the European Union has set maximum residue levels (MRLs) for pesticides in and on food products. Products containing more pesticides than allowed are withdrawn from the European market. MRLs relevant for berries can be found

at <https://ec.europa.eu/food/plant/pesticides/eu-pesticides-database/public/?event=homepage&language=EN>

Phytosanitary requirements

Berries exported to the European Union must comply with the European Union legislation on plant health. The European Commission has laid down phytosanitary requirements to prevent the introduction and spread of organisms harmful to plants and plant products in Europe.

Information on these requirements are available at <https://trade.ec.europa.eu/tradehelp/sanitary-and-phytosanitary-requirements>.

Food safety

Since food safety is a top priority in all European food sectors, buyers request extra guarantees from importers in the shape of certification. The most commonly requested certification for fresh berries is GlobalGAP, a pre-farm-gate standard that covers the entire agricultural production process, from before the plant is in the ground to the non-processed product (processing is not covered). GlobalGAP is almost always required, depending on the destination country, market conditions and market channel. It is a standard requirement for most supermarkets. Other food safety management systems that may be required are British Retail Consortium (BRC), International Featured Standards – IFS Food (IFS Food Standard), Food Safety System Certification SSC22000 (SSC22000), Safe Quality Food Programme (SQF). These management systems are supplementary to GlobalGAP, and are recognized by the Global Food Safety Initiative (GFSI).

Peaches and nectarines

Quality

For fresh peaches and nectarines, a specific EU Marketing Standard exists <https://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2011:157:0001:0163:EN:PDF>

Peaches and nectarines are classified in three classes:

- “Extra Class” are products of superior quality that are free of defects or contain only very slight superficial defects that do not affect the general appearance of the product

- “Class I” are products of good quality that can only contain slight defects in shape, coloring, skin and stalk
- Fruit that satisfy with the minimum requirements but do not qualify for Class I or Extra Class can enter the EU classified as “Class II”

In addition to the requirements above, peaches and nectarines should be free of fruit split at the stalk cavity.

For peaches and nectarines, the UNECE standards explain the guidelines for the minimum size of the produce and size uniformity depending on the Quality Class. Size tolerances occur but uniformity is compulsory for Extra Class and Class I.

For peaches and nectarines, additional size codes can be demanded ranging from D (51–55 mm diameter or 65–85 g weight) to AAAA (>90 mm diameter or >300 g weight).

Size and Packaging

Packaging requirements differ between customers and market segments. They must at least be packed in new, clean and quality packaging to prevent damage and protect the product properly. Some general characteristics are:

- Wholesale packaging is in cardboard boxes or wooden crates. These boxes can vary in size. Most produce is sold in 3- to 5-kg boxes.
- Retail packaging: In European retail nectarines and peaches are sold right out of the wholesale box or in ½- or 1-kilogram plastic boxes.

Labelling

To protect the right for consumers in the EU to access useful and appropriate information, Regulation (EU) No. 1169/2011 (<https://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2011:304:0018:0063:EN:PDF>) establishes the general principles, requirements and responsibilities governing food information and in particular food labelling. Each package must bear the following particulars, in letters grouped on the same side, legibly and indelibly marked, and visible from the outside.

- Identification: Information about the packer/dispatcher and or shipper;
- Nature of the product: The name of the product (e.g. “Peaches” or “Nectarines”) if the contents are not visible from the outside. For peaches and nectarines, the color of the flesh. Optionally, the name of the variety;
- Country of origin of the product;

- Commercial specifications: Class, size or size code, number of units (optionally);
- Traceability code;
- Official control mark (optional);
- If GlobalGAP certified, the GGN number.

Checks on conformity must be carried out before these goods enter European Community customs territory, except in the case of small lots which the inspection authorities/bodies consider to be low risk. In third-party countries that provide satisfactory guarantees of conformity, pre-export checks may be carried out by domestic inspection bodies. For peaches and nectarines no specific additional regulations are enforced.

Minimum Pesticide Residues

Pesticide residues are one of the crucial issues for peach and nectarine suppliers. To avoid health and environmental damage, the EU has set maximum residue levels (MRLs) for pesticides in and on food products. Products containing more pesticides than allowed will be withdrawn from the EU market. MRLs that are relevant to peaches and nectarines can be found in EU MRL database (<https://ec.europa.eu/food/plant/pesticides/eu-pesticides-database/public/?event=homepage&language=EN>)

Phytosanitary requirements

Fruit and vegetables exported to the EU must comply with the EU legislation on plant health. The EU has laid down phytosanitary requirements to prevent the introduction and spread of organisms harmful to plants and plant products in the EU (<https://trade.ec.europa.eu/tradehelp/sanitary-and-phytosanitary-requirements>). The requirements mainly imply that: Certain listed organisms are not allowed to be imported into the EU, unless specific circumstances apply.

Food safety

To ensure food safety and avoid environmental damage, the EU has restricted the use of certain chemicals in several Regulations and Directives. Fruits are subject to official controls. These controls are carried out to ensure that all foods marketed in the EU market are safe; i.e. in compliance with the requirements applicable to them. There are three types of checks:

- Documentary checks
- Identity checks
- Physical checks

As food safety is a top priority in all EU food sectors, most buyers request extra guarantees in the form of certification. GlobalGAP is the most commonly requested food safety certification scheme, essential for exporting stone fruit to Europe. Examples of other food safety management systems that can be required are British Retail Consortium (BRC) and International Food Standard (IFS), FSSC22000 or SQF. These management systems are supplemental to GlobalGAP and are recognized by the Global Food Safety Initiative (GFSI).

Dried fruits

Quality

The general quality requirement for all dried fruits is that products should be of "sound, fair and marketable quality" and bear the full name of their country of origin. Fruits that are not covered by a specific EU standard must meet the general standard – or the applicable UNECE standard (<http://www.unece.org/trade/agr/standard/dry/ddp-standards.html>). Operators are free to choose which standards they would use in their business practice.

The most common quality requirements for dried fruit are the following:

- moisture content (maximum level is defined for specific products);
- sizing (different for every type of dried fruit and nuts);
- specific cut (for certain types of dried fruit);
- level and types of used preservatives;
- quality class (defined by uniformity and tolerances).

Codex Alimentarius Codes of Hygienic Practice provides detailed requirement for dried fruit (http://www.fao.org/fao-who-codexalimentarius/sh-proxy/en/?lnk=1&url=https%253A%252F%252Fworkspace.fao.org%252Fsites%252Fcodex%252FStandard%252FCXC%2B3-1969%252FCXP_003e.pdf).

Size and packaging

The first requirement is that content in the packaging corresponds to the indicated quantity (in weight or volume) on the label. Importers will check packaging size and weight to ensure that pre-packed products are within the limits of tolerable errors.

Frequently there are buyer requirements for the use of recyclable packaging, such as cartons. This is especially relevant if the exporters aim to supply European retail chains, which often require that packaging is 100%

made of ecological and recyclable materials including lids and caps.

For consumer packaging materials that come in contact with food (like cans, jars), specific health control provisions apply. Food contact materials must be manufactured so that they do not transfer their constituents to food in quantities that could endanger human health, change the composition of the food in an unacceptable way or deteriorate the taste and odour of foodstuffs.

Packaging used for dried fruit must:

- protect the organoleptic and quality characteristics of the product
- protect the product from bacteriological and other contamination (including contamination from the packaging material itself)
- not pass on any odor, taste, color or other foreign characteristics to the product.

The safety of food contact materials must be evaluated and ensure that there is no migration of unsafe levels of chemical substances from the material to the food.

There is no general rule for export packaging, but dried fruit are usually packed in carton boxes with plastic liner inside.

Within Europe, the standard bulk package is 10 kg, but 12-kg cartons, 12–15-kg plywood joint boxes and 25–70-kg linen fabric bags are also used. When packed in corrugated or millboard cartons, the product should be transported on pallets.

The selected packaging size should be such that the dimensions conform to the conventional pallet sizes (800 x 1,200 mm and 1,000 x 1,200 mm) and cargo units may thus be produced. Retail packaging includes plastic bags, plastic containers or foil bags.

Labelling requirements

In December 2014, new European labelling legislation went into effect. The new labelling legislation forbids the misleading of consumers. Moreover, claims that any food is preventing, treating or curing a human disease cannot be made.

Another change is allergen labelling, where allergens have to be highlighted in the list of ingredients and requirements for information on allergens will also cover non-prepacked foods, including those sold in restaurants and cafés. Allergens include sulphur dioxide and sulphites at concentrations of more than 10 mg/kg in terms of the total SO₂. Nutrition information is also mandatory for most products.

The following labelling is used in the trade of dried fruit:

- The name of the product should be declared, specifying whether the product is naturally dried or sugar is added (for specific types of dried fruit)
- Regarding certain types of dried fruit which have seeds or pits, the label should declare the presence of seeds or pits
- It is common that in addition to grading, specifications include the crop year and variety.

Information for non-retail containers has to be given either on the container or in accompanying documents. The container labelling must contain the following information:

- name of the product;
- lot identification;
- name and address of the manufacturer, packer, distributor or importer;
- storage instructions.

However, lot identification as well as the name and address of the manufacturer, packer, distributor or importer may be replaced by an identification mark.

In the case of retail packaging, the product labelling must be in compliance with the European Union Regulation on food information to consumers (<https://eur-lex.europa.eu/legal-content/EN/ALL/?uri=CELEX:32011R1169>). This regulation defines more clearly the nutrition labelling, origin labelling, allergen labelling and legibility (minimum font size for mandatory information).

Food safety

The European Union constantly works to ensure that Europe's food supply is the safest in the world. The same standards of food safety apply to all food products regardless of whether they are imported or produced in Europe. The General Food Law is the legislative framework regulation for food safety in Europe. Around 90% of food legislation is harmonised at the European Union level.

The European Union has developed an integrated "Farm to Fork" approach covering all sectors of the food chain. This means that all food must be traceable throughout the entire supply chain and risks of contamination must be limited. To achieve this, all food business operators need to implement Hazard Analysis of Critical Control Points (HACCP) system in their daily operations. Note that food business operators also include exporters from developing countries.

The monitoring and implementation of food law is done in a collaboration between national and European organisations. The General Food Law specified establishment of the European Food Safety Authority (EFSA). EFSA is responsible for the development of specific food safety legislation and the creation of a framework for official food controls.

Although food safety certification is not obligatory under European legislation, it has become a must for almost all food European food importers. Most established European importers will not work with you if you cannot provide some type of food safety certification proof as the basis for cooperation.

The majority of European buyers ask for Global Food Safety Initiative (GFSI) certification. For fruit and vegetable processors and traders, the most popular certification programmes are:

- International Featured Standards (IFS)
- British Retail Consortium Global Standards (BRC)
- Food Safety System Certification (FSSC 22000)

This list is not exhaustive and food certification systems are constantly developing. The majority of food safety certification programmes are based on existing ISO standards like ISO 22000.

Although different food safety certification systems are based on similar principles, some buyers may prefer for one specific management system. Also, it should be taken into consideration that food safety certification is only a basis to start exporting to Europe, but reliable buyers will usually visit production facilities. If the supply are to big retail chains in Europe, retail chain representatives may conduct audits a few times per year.

The most important aspects of legislative requirements based on the General Food Law relevant for exporters from developing countries include: Control of food imported to the European Union and Contaminants.

Contaminants

Contaminants may be present in food as a result of the various stages of its production, packaging, transport or holding or from the external environment. The EU has taken strict and extensive measures to minimize contaminants in foodstuffs. This EU Regulation sets maximum levels for certain contaminants in food products. This regulation is frequently updated and apart from the limits set for general foodstuffs there is a number of specific contaminants limits for specific products (

<https://eur-lex.europa.eu/legal-content/EN/ALL/?uri=CELEX%3A32006R1881>).

Contaminants among others include:

Minimum pesticide residues

The European Union has set maximum residue levels (MRLs) for pesticides in and on food products (<https://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2005:070:0001:0016:en:PDF>). Products containing more pesticide residues than allowed will be withdrawn from the European market. The European Union regularly publishes a list of approved pesticides that are authorized for use in the European Union. This list is frequently updated. The European Union Directive on Maximum Residue Levels on Pesticides defines MRLs and should be frequently checked. MRLs apply to certain number of fresh products and to the same products after processing. A general default MRL of 0.01 mg/kg applies where a pesticide is not specifically mentioned. Some European buyers may use stricter limits for pesticide residues than in official MRLs regulations. Importers of processed fruit and vegetables may opt to limit risk of non-compliance and adopt a safety margin compared to the official limit.

Limited amount of heavy metals in food

Limited amount of heavy metals in food Heavy metals can occur as residues in food because of their presence in the environment, as a result of human activities such as farming, industry or car exhausts or from contamination during food processing and storage. The European Union regulation on food contaminants sets restrictions for lead (fruit, fruit juices, various kinds of vegetables), cadmium (fruit and vegetables), and mercury in food supplements and tin (canned food and beverages) (<https://eur-lex.europa.eu/legal-content/EN/ALL/?uri=CELEX%3A32006R1881>)

Reducing the risk of microbiological contaminants

The most common types of microbiological contaminants in processed fruit and vegetables are salmonella and viruses such as norovirus and Hepatitis A viruses. According to EU legislation salmonella is an important source of contamination in unpasteurized fruit and vegetable juices. It can be also present in other processed fruit and vegetable products (<https://eur-lex.europa.eu/legal-content/EN/TXT/HTML/?uri=CELEX:02005R2073-20140601&rid=1>).

Official border control for food imported to the European Union

Official food controls include regular inspections that can be carried out at import or at all further stages of

marketing. In case of non-compliance with the European food legislation, individual cases are reported through the Rapid Alert System for Food and Feeds (RASFF), which is freely accessible for the general public.

Repeated non-compliance with the European food legislation by a particular country may lead to special import conditions or even suspension of imports from that country. This is part of a risk-based approach of the food safety authorities, which focus their resources on the products and origins that represent the highest risks for food safety.

Nevertheless, only a small part of the products imported and marketed in Europe is subject to official (physical) controls, since the first responsibility for their safety is with the commercial operators such as importers. Importers will therefore conduct most of the checks required for assuring a safe product and may also demand certification and other proof of quality and safety.

The European Parliament and Council adopted the New Official Controls Regulation on 15 March 2017. It entered into force on 27 April 2017. Secondary legislation on official food controls legislation has to be revised in the near future. You can read more about application dates in the application timeline table. New official controls regulation will extend its scope to organic products. Exporters from third countries will use the single standard Common Health Entry Document for the prior notification of exports.

In the event of repeated non-compliance of specific products originating from particular countries those can only be imported under stricter conditions. Those stricter conditions include laboratory test results for a certain percentage of shipment from specified countries. Products from countries that have shown repeated non-compliance are put on a list included in the Annex of the Regulation on increased level of official controls on imports.

Product composition requests

Buyers and European authorities can reject products if they have undeclared, unauthorized or too high levels of extraneous materials. There is specific legislation for additives (like colors, thickeners) and flavorings that list what E-numbers and substances are allowed to be used. If you want to add vitamins you will have to know which vitamins (see Annex I) and sources, vitamin formulations and mineral substances are allowed (see Annex II).

Additives that are authorized are listed in Annex II to the Food Additives Regulation. The authorized uses of additives are listed according to the category of food to which they may be added. Other annexes of the regulation list food enzymes, flavorings and colorants. Note that pectin derived from apple, citrus fruits or quinces, which is used in the production of jams and marmalades, is not considered to be a food additive.

Vitamins and minerals can be added to fruit juices and fruit nectars. Maximum levels have not been established yet but the European Commission is working on a proposal for those.

Food additives permitted before 20 January 2009 must go through a new risk assessment by the European Food Safety Authority (EFSA). The most relevant processed fruit and vegetables additives that are currently under the assessment are sorbates and sulphites. However it is difficult to say when exactly the Commission will discuss possible changes to the maximum levels.

Product specific legislation regarding composition applies to fruit juices and fruit jams, jellies, marmalade and sweetened chestnut puree. The Directives indicate which raw materials and additives may be used. In the processed fruit and vegetables sector problems commonly occur because of undeclared or too high content of used preservatives.

Examples of frequent problems are sulphite used as a preservative in dried fruit and coconut products, and benzoic acid in some pickled vegetable products. Another frequent problem is too high or undeclared content of food colors. Typical examples are color E110 - Sunset Yellow used in dried candied fruit or color E102 – tartrazine, which also gives a yellow color and is used in condiments, spreads, pickled products and soft drinks.

Juices

Exports to Europe are generally done as semi-finished product (bulk tanks, drums, containers), packing of consumer products is done by European bottling companies.

Product definition

Generally, fruit juice is defined as the unfermented liquid of the edible part of the fruit. Although juices can be made by squeezing of fresh fruit, the majority of fruit juices on the world market are made from raw materials such as concentrated juices or purées. Fruit juices may contain pulp but do not contain:

- pieces of shell;
- seeds;
- coarse or hard substances;
- excess pulp.

Juice intended for export is usually concentrated and later reconstituted with water. This is because of practical reasons for lowering transport costs. In this way, transport costs for water and packaging can be saved. Fruit purées and concentrated fruit purées are used in the manufacturing of specific juices (such as strawberry, peach, apricot, and so on). They are obtained by suitable processes; for instance, by sieving, grinding and milling the edible part of the whole or peeled fruit, without removing the juice.

Vitamins and minerals can be added to fruit juices. You can find approved list of additives in the European Regulation on the addition of vitamins and minerals and in the regulation on food additives. Other allowed ingredients include restored flavour, pulp and cells.

The name “fruit juice” is reserved for 100% fruit juices. However, if sugar, sweeteners or acid are added to fruit juice which is diluted with water, the product must be called nectar or fruit drink.

Quality

According to industry practice, the most important quality requirements for fruit juices are defined by the following parameters:

- Color: characteristic of the type and variety of fruit.
- Flavor and odor: distinct fruit flavor and odor, free from foreign flavors and odors.
- Brix level: quality of concentrated fruit juices, mainly defined by the Brix level (sugar content of an aqueous solution). The Brix level directly influences the price of the product. For products not from concentrate (NFC) a minimum Brix level is obligatory.
- Composition: the share of different types of juices in the case of mixed juice.

Additional quality requirements are as follows:

- Pulp content: pulp content is a quality indicator for certain types of juices, such as orange or pineapple. Importers may require more pulp content, as visible pulp in juices is becoming more popular among European consumers.
- Acid level: in addition to the Brix level, the citric acid level is the most common parameter that influences the quality and price of some juice products.

European Directive 2001/112/EC and Directive 2012/12/EU define the composition of:

- fruit juices;
- concentrated fruit juices;
- dehydrated fruit juices;
- fruit nectars.

The reserved names, manufacture and labelling characteristics of the above products are also defined. Those directives also define the minimum Brix levels for reconstituted fruit juice and reconstituted fruit purée. The Fruit Juice Directive was updated the last time in 2012.

Size and packaging

The most common export types of packaging for concentrated fruit juices are aseptic or sterile filled:

- bag-in-box 20 l;
- plastic container 20 l;
- steel drum 200–250 l;
- plastic drum 200–250 l;
- stainless steel container (200–800 l);
- foldable container, usually 1,000 l;
- truck tankers, usually 25,000 l.

Regarding retail packaging, most fruit juices on the European market are sold in cartons, followed by plastic and glass.

Food safety

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In the fruit juice industry, the most recent development is SGF certification, which aims to achieve more safety, quality and fair competition in the fruit juice sector through industrial self-regulation. SGF certifies fruit processing companies, packers and bottlers, traders and brokers for fruit juices, as well as transport companies and cold stores in almost 60 countries worldwide.

For raw material suppliers in developing countries operating in the fruit juice industry, an important part of the SGF certification system is called IRMA (International Raw Material Assurance). In an ideal situation for the fruit juice industry to have the whole supply chain under control, farmers should be GlobalGap certified, fruit processors should be IRMA certified, while juice bottlers should be certified by EQCS (European Quality Control System for juices and nectars).

Wine grape spirits

Exports of grape spirits from Georgia to EU are subject to labelling, packaging, and traceability requirements.

- <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32019R0787>

According to EU requirements Grape marc spirit or grape marc is a spirit drink which meets the following conditions:

- it is produced exclusively from grape marc fermented and distilled either directly by water vapor or after water has been added;
- a quantity of lees may be added to the grape marc that does not exceed 25 kg of lees per 100 kg of grape marc used;
- the quantity of alcohol derived from the lees shall not exceed 35 % of the total quantity of alcohol in the finished product;
- the distillation shall be carried out in the presence of the marc itself at less than 86 % vol.;
- redistillation at the same alcoholic strength is authorized;
- it contains a quantity of volatile substances equal to or exceeding 140 grams per hectolitre of 100 % vol. alcohol and has a maximum methanol content of 1 000 grams per hectolitre of 100 % vol. alcohol.
- The minimum alcoholic strength by volume of grape marc spirit or grape marc shall be 37.5 %.
- No addition of alcohol as defined in Annex I (5), diluted or not, shall take place.
- Grape marc spirit or grape marc shall not be flavored. This shall not exclude traditional production methods.
- Grape marc spirit or grape marc may only contain added caramel as a means to adapt color (<https://eur-lex.europa.eu/legal-content/en/ALL/?uri=CELEX%3A52005PC0125>)

Custom tariffs applicable on Georgian exports in EU

Exports of all analyzed products from Georgia to EU are subject to 0% import duty. Only in case of nectarines and raspberries there is minimum price requirements as follows:

- For nectarines – import unit price must equal or be greater to EUR 161.7 per 100 kg

- For raspberries – import unit must equal or be greater than EUR 910.7 per 100 kg.

Findings of analysis

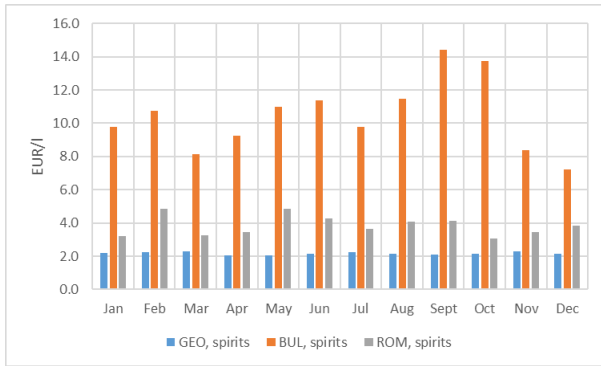
This section of the report presents Georgia’s export opportunities to Romania and Bulgaria for selected products based on export and import unit price comparison

All products with the exception of dried apricots, prunes, peaches, and pears have export opportunity either to Romania or Bulgaria or to both countries. The best prospects have fruit juices and grape spirits, followed by fresh berries, nectarines, and peaches in a declining order of likelihood. Findings of comparison of Georgia export unit prices and Bulgaria and Romania import unit prices on selected products are provided in the Table 81 below.

Table 81. Georgia export possibility based on comparative review of export and import unit prices

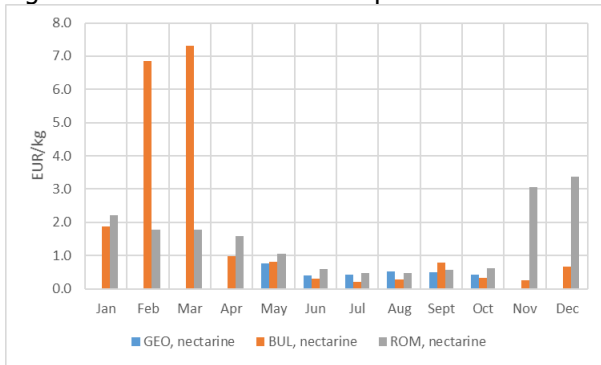
Product	Georgia export possibility
Grape spirits	Both to Bulgaria and Romania throughout the year (Figure 43)
Nectarines	To Bulgaria in September and to Romania in June and October (Figure 44)
Peaches	Romania in May, June, and September (Figure 45)
Strawberry	Both to Bulgaria and Romania in January, April, and May (Figure 46)
Blackberry	Both to Bulgaria and Romania in July (Figure 47)
Currants and gooseberries	To Romania during June-August period (Figure 48)
Cranberries and bilberries	To Romania during June-July (Figure 49)
Dried apricot	None (Figure 50)
Dried prune	None (Figure 51)
Dried apple	To Bulgaria during June-July (Figure 52)
Dried peaches	None (Figure 53)
Dried pears	None (Figure 54)
Juices	Both to Bulgaria and Romania throughout the year excluding January (Figure 55)

Figure 43. Grape spirit trade unit prices



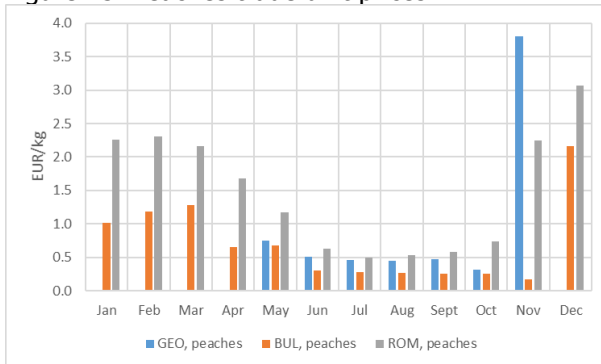
Source: www.intracen.org, estimates

Figure 44. Nectarine trade unit prices



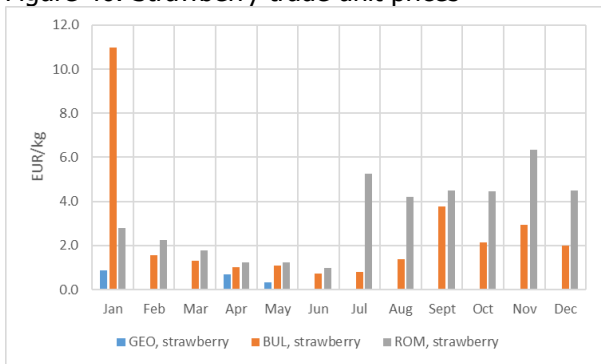
Source: www.intracen.org, estimates

Figure 45. Peaches trade unit prices



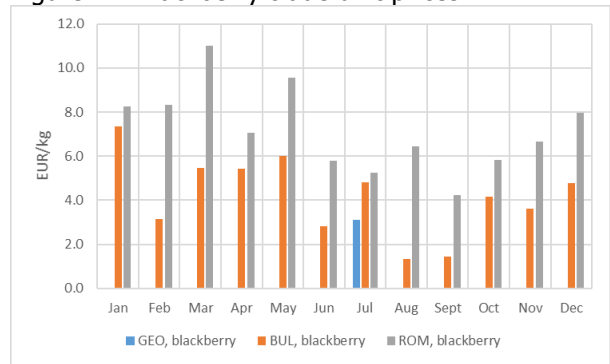
Source: www.intracen.org, estimates

Figure 46. Strawberry trade unit prices



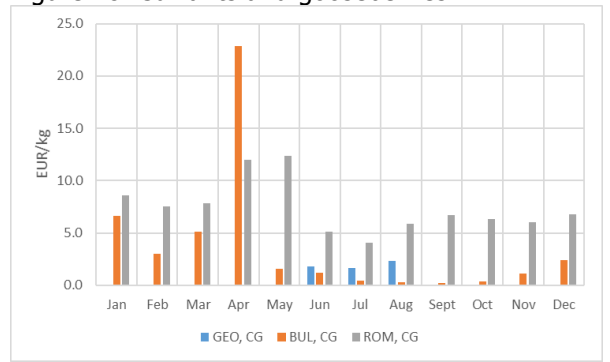
Source: www.intracen.org, estimates

Figure 47. Blackberry trade unit prices



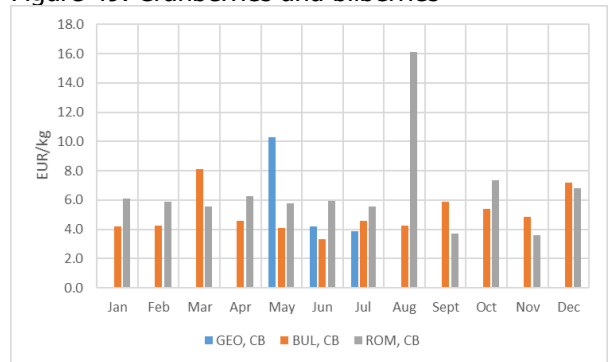
Source: www.intracen.org, estimates

Figure 48. Currants and gooseberries



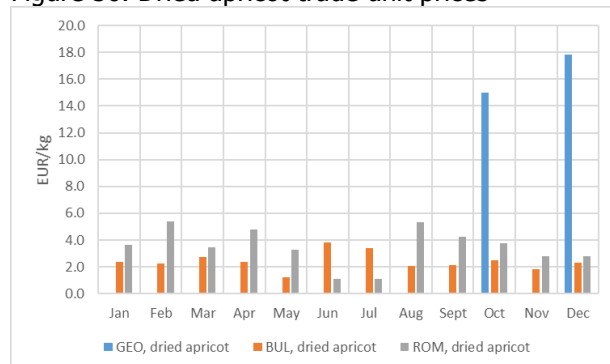
Source: www.intracen.org, estimates

Figure 49. Cranberries and bilberries



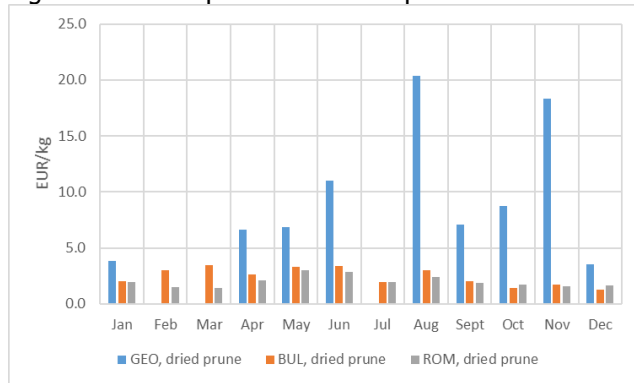
Source: www.intracen.org, estimates

Figure 50. Dried apricot trade unit prices



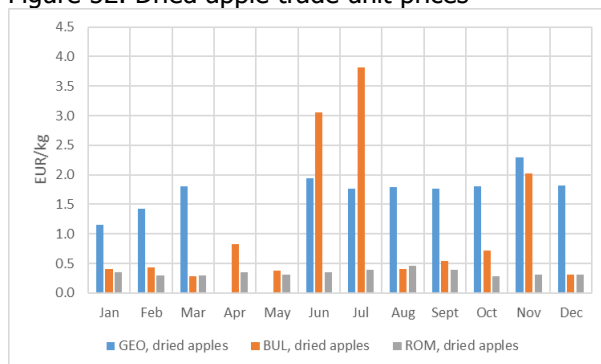
Source: www.intracen.org, estimates

Figure 51. Dried prune trade unit prices



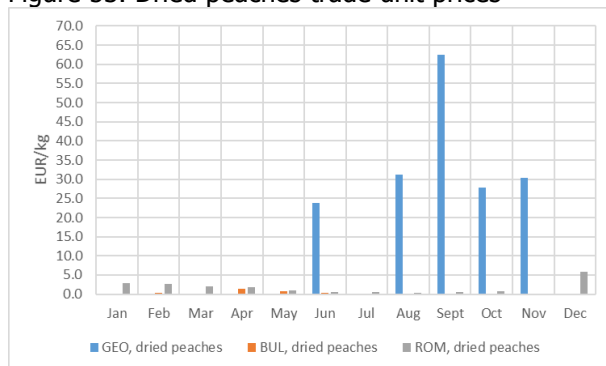
Source: www.intracen.org, estimates

Figure 52. Dried apple trade unit prices



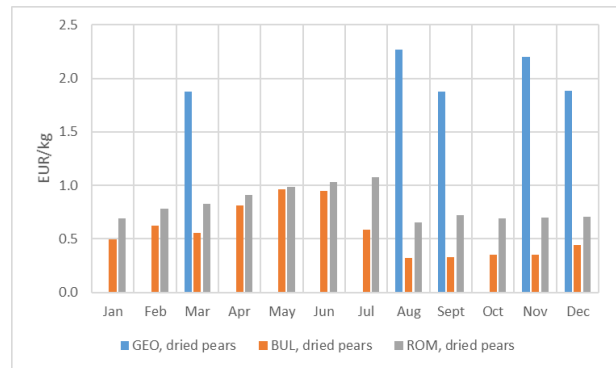
Source: www.intracen.org, estimates

Figure 53. Dried peaches trade unit prices



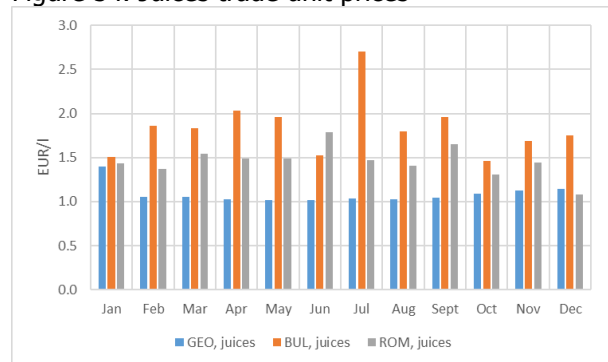
Source: www.intracen.org, estimates

Figure 54. Dried pears trade unit prices



Source: www.intracen.org, estimates

Figure 54. Juices trade unit prices



Source: www.intracen.org, estimates

Approach to the marketing

Certain steps need to be taken to facilitate to the export of selected products to Bulgaria and Romania. These steps can be generalized as follows:

- Compete not only on price, but on quality
- Ensure uniformity in quality, size, etc.
- Ensure efficient supply chain logistics and transport processes
- Use trade fairs in EU to present the products to potential buyers/ importers
- Build long-term relations with buyers/ importer
- Adhere to contract product specifications (with buyers/ importers)
- Adhere EU plant health and food safety requirements
- Use establish trade routs
- Monitor production, trade and weather information

More specific information in regard to the marketing strategies can be accessed at:

- <https://www.cbi.eu/market-information/fresh-fruit-vegetables/stone-fruit/>

- <https://www.cbi.eu/market-information/processed-fruit-vegetables-edible-nuts/competition-edible-nuts-dried-fruits/>
- <https://www.cbi.eu/market-information/processed-fruit-vegetables-edible-nuts/fruit-juices/europe/>

- Improved accessibility to certification services of Georgian products (GlobalGAP, BRC, etc.)

Potential risks and remedies

The biggest risk on the marketing side should be exporter adherence to plant health and food safety requirements, and ensuring uniformity in the quality and other characteristics of the products. To address potential risks, there is a need for continued education of producers and exporters, and their international exposure to the practices followed in competitor countries.

Risks on the production side are related to the high unit production costs brought by low productivity and high production costs. This risk should be addressed by capacity strengthening of producers in production and post-harvest handling practices, and improved availability and accessibility to production inputs and infrastructure.

Conclusion and recommendations

Georgia exports of selected products to Romania's and Bulgaria's markets will face significant competition. Competition will be from local producers in target countries, from other members of EU, and from the third countries. Both Romania and Bulgaria have similar production pattern to that of Georgia; both countries produce the same products. The same time, other EU member countries and neighboring Balkan countries and Turkey are significant producers of the same products selected as export commodities from Georgia.

Number of measures should be implemented to ensure competitive supply of selected products from Georgia to Romania and Bulgaria markets including:

- Enhancement of capacity of growers in production
- Enhancement of post-harvest handling practices
- Improvement in the availability and accessibility to production inputs and infrastructure
- Enhanced efficiency in transportation services
- Promotion of Georgian products in target markets

References

- Exporting stone fruit to Europe - <https://www.cbi.eu/market-information/fresh-fruit-vegetables/stone-fruit/>
- Exporting fresh blueberries to Europe - <https://www.cbi.eu/market-information/fresh-fruit-vegetables/blueberries/>
- Exporting fresh berries to Europe - <https://www.cbi.eu/market-information/fresh-fruit-vegetables/fresh-berries/europe/>
- Exporting fresh strawberries to Europe - <https://www.cbi.eu/market-information/fresh-fruit-vegetables/fresh-strawberries/>
- Exporting fruit juices to Europe - <https://www.cbi.eu/market-information/processed-fruit-vegetables-edible-nuts/fruit-juices/europe/>
- Exporting edible nuts and dried fruits to Europe - <https://www.cbi.eu/market-information/processed-fruit-vegetables-edible-nuts/edible-nuts-dried-fruits/europe/>