

FOREIGN TRADE OF GEORGIAN AGRICULTURAL PRODUCTS AND EXISTING POTENTIAL OF EXPORT TO THE EUROPEAN UNION MARKET

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Abstract. This paper attempts to describe the high importance of the agricultural sector and export potential of agricultural products for Georgian economy, while presenting historical evidence and overview of recent trends. Georgian agriculture is primarily in very bad situation with small market surpluses and low productivity. According to World Bank surveys, approximately 83% of Georgia’s rural population is entirely dependent upon their farms for subsistence and they consume approximately 73% of what they produce and remaining products which are supposed for export, are facing lots of difficulties for gaining appropriate success and outcomes. For reaching alternative markets of the United States or the European Union countries, will be needed structural reforms for strengthening Georgia’s sustaining growth, attracting investment and improving overall productivity for further export diversification and sector development. Using statistical data it becomes more obvious who are the main export partners, which market segments and destinations are better for rising overall export potential and how export of Georgian agriculture products is changing over years – decline of agriculture’s contribution to overall trade from 28% in 2000 to 18% in 2012 leaves a clear perspective for further development, improvement and better contribution to country’s economy.

Key words: agricultural sector, export of agricultural products, existing and potential export markets, EU standards and regulations, FTAs, structural reforms

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INTRODUCTION

Georgia is a small (67.9 km²), strategically located South Caucasus middle-income country of 4.5 million people, with a level of GDP per capita, which is considered as low by European standards.

Georgia is considered to be a country of rich and one of the oldest agricultures on the earth. Starting from the ancient times, Colchis people cultivated different grain, oil and fiber crops, harvested hazelnuts, walnuts, laurel and chestnut trees [Ketskhoveli 1957].

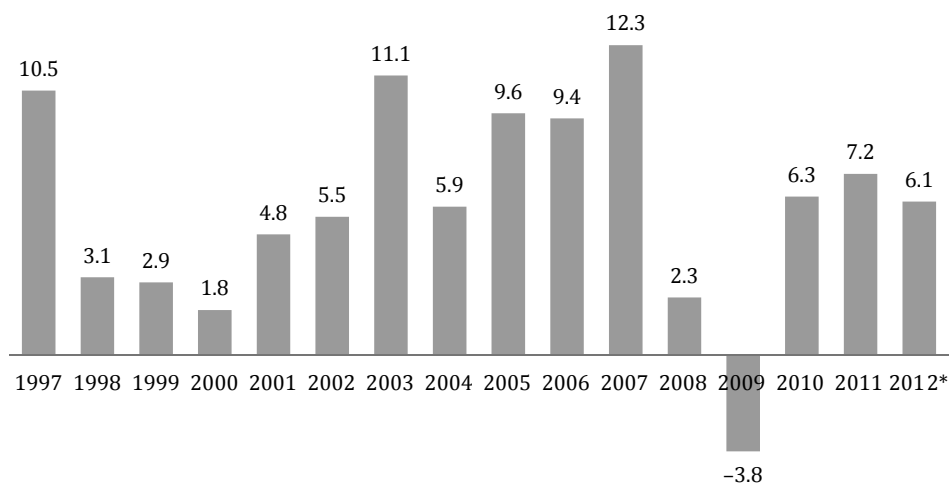
But nowadays Georgia is satisfying its demand on food at the expense of import (80%). The high dependence on import is increasing permanently. And all this happens in circumstances when price on food is continuously rising in the world markets with predictions about worsening of existed food problems [FAO 2012]. According the United Nations Food and Agriculture Organization, in conformity with provision of food to society among developing countries divided into seven groups, Georgia moved from the fifth to the sixth group, standing near poor African countries, while having resources to feed 10–12 million people [Koguashvili et al. 2011].

During the Soviet period of time Georgia was a leading agricultural country, providing up to 10% of the highest quality food in the inter-republic trade. After gaining independence in 1991, Georgia's economy suffered immensely during transition from planned to market economy, followed by the wars in 1991–1993 in the South Ossetian Autonomous Region and the Abkhazian Autonomous Republic. The country's agricultural sector was much affected during this period as well. Beginning in the mid of 1990s it started to recover, there were good increasing tendency till Russian embargo in 2006 imposing a ban on Georgian wine and mineral water, with reason that this products do not meet Russian quality standards and as a result eliminated over 90% of export markets for Georgian wine industry, which despite positive rehabilitation changes and rising tendencies of Georgian total export has not fully recovered yet. Then August 2008 war, rising energy prices, financial crisis and a declining economy in many countries to which Georgia exported or planned to export its food products affected Georgian agriculture sector a lot.

But despite various problematic issues until 2008 the economy of Georgia was expanding, experiencing continuous growth in real GDP till 2008 (Fig. 1), which was supported mainly by continual growth of the industrial and construction sectors, trade services, transport and communication sectors, while agriculture slightly contributed to the GDP growth. According statistical data of 2012, the largest shares of GDP by activity were held by trade services – 17.2% and industry – 16.9%, followed by public administration – 12.7%, transport and communication services – 9.4%, construction 8.8% and agriculture – 7.7% (Table 1).

MATERIAL AND METHODS

The purpose of this paper is to address specific problems existing in the Georgian agricultural sector, providing background, analysis, recommendations and perspectives, trying to evaluate possible changes and important steps towards positive outcomes.



* Adjusted data will be published on November 15, 2013.

Fig. 1. Real growth rates of gross domestic product in 1997–2012* (percentage)

Source: National Statistics Office of Georgia (<http://www.geostat.ge/>).

Table 1. Structure of gross domestic product in 2006–2011 (percentage)

Specification	2006	2007	2008	2009	2010	2011	2012*
Agriculture	12.8	10.7	9.4	9.4	8.4	8.8	7.7
Industry	17.0	16.5	15.5	15.4	16.1	17.1	16.9
Construction	7.9	7.8	6.4	6.5	6.1	6.7	8.8
Trade services	15.6	14.8	16.2	16.8	16.8	16.9	17.2
Transport and Communication	13.2	12.1	11.0	11.2	11.5	10.5	9.4
Other branches	33.5	38.1	41.5	42.4	41.1	39.9	40

* Adjusted data will be published on November 15, 2013.

Source: National Statistics Office of Georgia (<http://www.geostat.ge/>).

Based on the statistical data, using qualitative and quantitative analysis along with existing literature, reports and results of surveys conducted and reviewed by government agencies, donors, international organizations etc. on Georgia's overall economic performance, as well as studies carried out in agriculture sector, this paper enables to clearly see high importance of agriculture for Georgia's economy, the theoretical aspects of strategy for its further development and existing potential of the sector, despite numerous problems that require appropriate attention.

RESULTS AND DISCUSSION

General performance of agricultural sector

Agriculture has rich and distinguished history in Georgia, possessing favorable conditions for production of a wide range of agricultural products and has always been one

of the key sectors of the Georgian economy and the largest employer as well. It employs more than half of the country's workforce and 60–70% [CASE 2008] of the Georgian population depend on this sector despite the fact that since 1996 the share of agriculture in GDP is declining each year (Fig. 2). According to data from the National Statistics Office of Georgia (NSO), despite the fact that real value added from 1996 to 2006 was steady, share of agriculture in GDP fell from 34.1 to 12.8% and in 2011 reached 8.8%. But still share of agribusiness in the output of total economy is about 20% (Fig. 3).

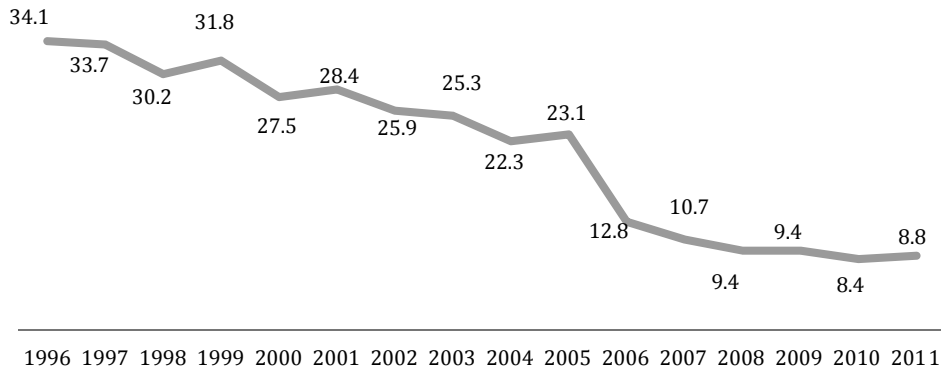
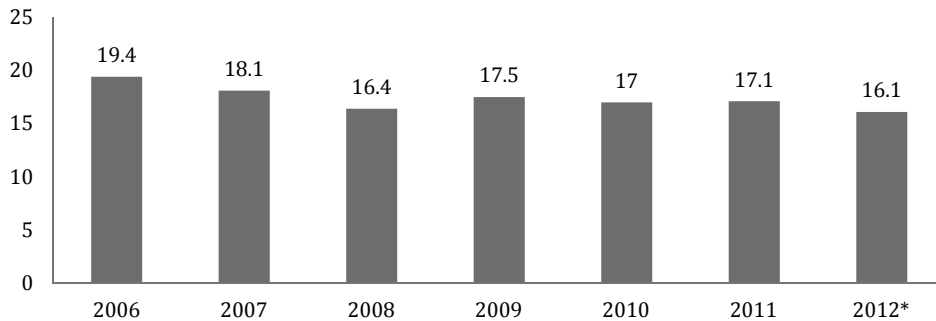


Fig. 2. Share of agriculture in gross domestic product in 1996–2011 (percentage)

Source: National Statistics Office of Georgia (<http://www.geostat.ge/>).



* Adjusted data will be published on November 15, 2013.

Fig. 3. Share of agribusiness in the output of total economy in 2006–2012 (percentage)

Source: National Statistics Office of Georgia (<http://www.geostat.ge/>).

During the Soviet era, agriculture was characterized by state ownership of all agricultural land and concentration of production in large-scale collective farms [USAID 2009]. In 1992, the government began to privatize rural land. The government allocated 1.25 hectares to each rural family from the holdings of the collective and state farms. As a result more than one million plots were distributed, what created the situation that nowadays “most of the holdings are not run for commercial purposes, but for subsistence farming. Land used for agricultural production is composed of highly fragmented 4 million pieces of land, which are small and rarely exceed 1 hectare” [The Inter-Agency

Working Group..., 2009–2010]. What reduces effectiveness and consequently the majority of household production became oriented towards self-sufficiency [Economic Policy Research Centre 2011].

“Agriculture in Georgia relies mainly on small-scale farming with low production efficiency. On average 0.88 ha of arable land is owned by one farmer. These small farms produce more than 80 per cent of the total production. Only 8–10 per cent of this production goes to the market. Large-scale farms produce about 10 per cent of the total agricultural production and almost all is destined for the market. At present small farms dominate the agricultural sector. They operate mainly for domestic consumption. In addition, the share of farms that have privately owned farming equipment and agricultural machinery is a little more than 20 per cent. In fact, in Georgia on average 53.2 tractors and 0.4 harvesters were employed per 1000 ha. Until 2005, 75 per cent of agricultural land and 2.5 million hectares of forests were under state ownership. In 2005, the Law on Privatization of State-Owned Agricultural Land was adopted in order to promote efficient use of land through private ownership and thus increase efficiency in the agricultural sector. Forests and other natural resources are being transferred more actively to private hands under long-term tradable licenses” [UNDP Georgia 2011].

According to the information from the Ministry of Agriculture of Georgia, lands remaining state-owned are comprising 80,000 ha (22%), while 280,000 ha (78%) are already privatized. 44% of Georgia’s total area is considered to be agricultural land, which consist of approximately 3 million hectares: residential 1%, arable land 27%, perennials crops 9%, pastures 63%.

The climate creates favorable conditions for the production of diverse agricultural products, including viticulture, cereal production, and a wide range of vegetables, fruit, nuts, livestock, dairy foods, citrus and tea.

Georgian agricultural sector plays an important role for country’s economy in terms of possible GDP contribution, net foreign exchange earnings, employment generation and importance for poverty reduction, but nowadays this sector is experiencing a range of different problems.

Existing problems and trade tendencies for Georgian agricultural products

Since the crisis of 1990s export of Georgian agricultural products (Table 2) had rising or declining tendencies through years till 2008, after what it has steady growing trend [USAID Georgia 2011]. While agricultural imports have stable growing shift through each year. But what is worth to mention is that if before agricultural imports were approximately twice more than exports, after 2006 agricultural imports exceeded agricultural exports three times. All this shows a decline of agriculture’s contribution to overall trade from 28% in 2000 to 18% in 2012 and leaves a clear perspective for further development, improvement and better contribution to country’s economy.

And as 60% of Georgian agricultural products were usually taken to Russian markets, numerous companies have been hurt by the embargo, especially those exporting wine, mineral water, fruit and vegetables. Thus, today, the Georgian agricultural sector is struggling to adapt to a radically different world than the one in which it operated prior to 2006.

Table 2. Agricultural trade in comparison to the total trade in 2000–2012

Item	Unit	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Exports	m \$	91.8	78.9	95.9	146.9	167.4	330.9	266.2	249.3	250.5	286.9	297.8	316.5	436.7
Imports	m \$	161.9	155.6	154.4	182.9	367.5	433.7	561.7	762.1	942.1	737.3	920	973.3	1 198.7
Total exports	m \$	323.9	317.2	345.7	461.3	646.9	865.5	966.4	1 232.1	1 495.3	1 133.6	1 677.5	2 189.1	2 377.5
Total imports	m \$	709.5	752	794.7	1 139	1 844.3	2 487.5	3 674.8	5 212.2	6 301.5	4 500.2	5 257.1	7 057.8	7 842.1
Share in total exports	%	28	25	28	32	26	38	28	20	17	25	18	14	18
Share in total imports	%	23	21	19	16	20	17	15	15	15	16	18	14	15

Source: National Statistics Office of Georgia (<http://www.geostat.ge/>).

Georgian agriculture is primarily in very bad situation with small market surpluses and low productivity. According to World Bank surveys, approximately 83% of Georgia's rural population is entirely dependent upon their farms for subsistence and they consume approximately 73% of what they produce and remaining products which are supposed for export, are facing lots of difficulties to gain appropriate success and outcomes.

Traditionally, the main exporting products of Georgia are agricultural products (such as mineral waters, wine, nuts, fruit, alcohol and non-alcohol beverages and citruses) and industrial products (ferroalloys, copper ores, scrap metal, fertilizers, gold, ores, and vehicles).

The biggest growth potential for exports is in the citrus, tobacco, and wheat sectors. With substantial investment in technologies and infrastructure, Georgian agricultural sector will have significant potential to export soy, cooking oil, corn, nuts, tea, and herbs. Georgian agricultural sector needs to improve productivity, use all naturally gained opportunities and with appropriate support it will be possible to reach desired outcomes.

According to the 2011 data of the National Statistics Office of Georgia (NSO), the export of agricultural products was \$310 million and imports – \$957 million. Share of major commodity positions by exports was: live animals 15%, cereals 3%, edible fruit and nuts, peel of citrus/melon 32%, residues from food industries, animal feed 2%, beverages, spirits and vinegar 42%, accounted for 94% of total exports. And share of major commodity positions by imports was: meat and edible meat offal 11%, animal or vegetable fats 7%, cereals 21%, sugar and sugar confectionary 15%, tobacco and manufactured tobacco substitutes 10%, amounted 63% of total imports (Fig. 4a and b).

Since the Russian embargo, the other CIS countries have dominated as destinations for Georgian agro products. The main export markets are: Ukraine, Kazakhstan, Azerbaijan, Belarus and the EU countries (Fig. 5a and b). Ukraine is the first exporter country of agricultural products to Georgia, followed by Russia, Turkey, Brazil and Kazakhstan. To ensure Georgia's continuous economic growth and development, diversification of its export markets is essential. This implies expansion of its exports volume to strategically important markets like European Union, United States of America, China, India etc.

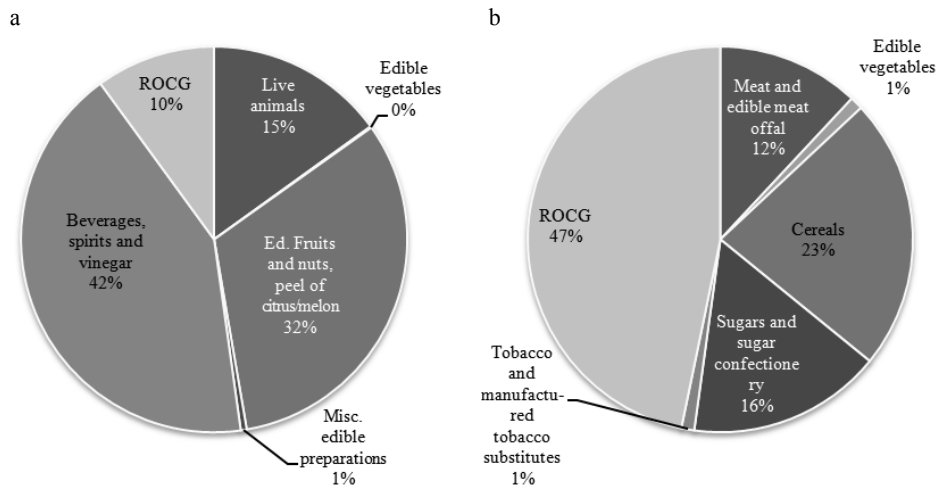


Fig. 4. Exports by commodity groups (2011) (a), imports by commodity groups (2011) (b)
Source: National Statistics Office of Georgia (<http://www.geostat.ge/>).

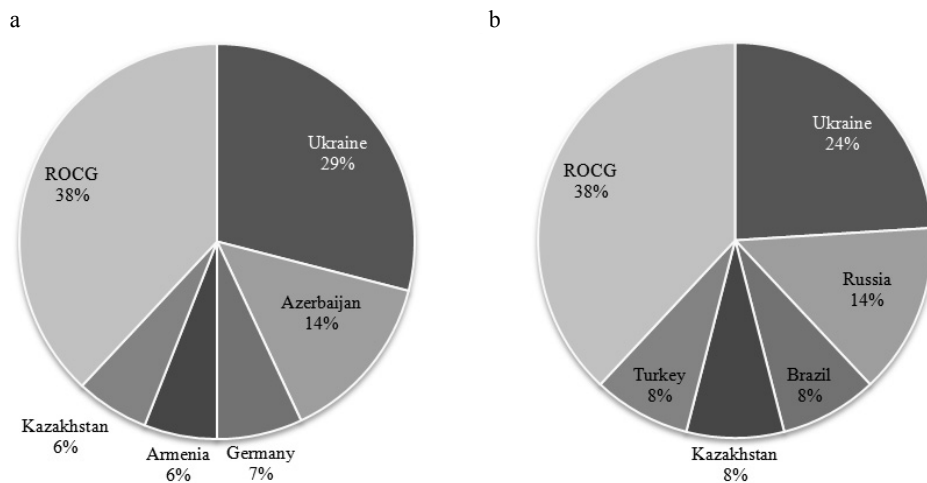


Fig. 5. Exports by countries (2011) (a), imports by countries (2011) (b)
Source: National Statistics Office of Georgia (<http://www.geostat.ge/>).

To diversify existing export markets after 2004, the country started elimination of tariff and non-tariff barriers to trade. These contributed to the creation of more competitive market conditions and improvement of the business environment, diversified international trade and made country more integrated to the world economy. The Ministry of Agriculture of Georgia adopted a number of technical regulations in the field of pesticides and agrochemicals, in particular, the rules of marking, testing and registration, storage, transportation, placement and use. The regulations are broadly in line with international standards and the EU rules, but still, lack of modern agricultural equipment and infrastructure, insufficient level of agricultural producer's knowledge about potential

markets, outdated drainage and irrigation systems, underdeveloped livestock feed and seed production, as well as shortage of post-harvest handling facilities like storage, packing, sorting, are existing obstacles to production and further exports. Country is facing lack of financial resources and not enough investment, important for further development [USAID Georgia, EWMI, EI-LAT 2012].

For further improvement of trade, all earlier-mentioned problems must be overcome and as the rural economy is very important for Georgia's future growth as well as employment generation leading to poverty reduction, appropriate actions from government and private sector together in cooperation must be done.

Accessing the EU market

“Relations between the EU and Georgia started in 1992 just after Georgia regained its sovereignty in the wake of the break-up of the Soviet Union. The main legal framework of the EU-Georgia relations is the Partnership and Cooperation Agreement (PCA) (in force since July 1999). In 2004, Georgia was included in the European Neighbourhood Policy (ENP) and in 2006 was adopted the ENP Action 5 years plan to fulfil provisions of the PCA and support Georgia's further integration in the social and economic structures of the EU. In 2009 the EU launched Eastern Partnership (EaP) to support socio-economic and political reforms in Georgia and further integration. In 2010 were launched negotiations for the EU-Georgia Association Agreement, signed the Visa Facilitation and Readmission Agreements and the Common Aviation Agreement, initialized, bilateral agreement on Mutual Protection of Geographical Indication of Agricultural Products (wine, spirit) and other Foodstuff. Georgian authorities are committed to timely conclude this agreement. And nowadays, the European Union and Georgia have been engaged in an ambitious process towards reaching a Deep and Comprehensive Free Trade Area (DCFTA). To access the EU market is not an easy task. Despite somewhat favorable trade conditions with Europe (a number of positive preconditions for achieving better results are already in place, namely, GSP+ etc.) trade between the EU and Georgia remains limited, with a clear need for diversification, especially when it comes to Georgian export” [Taralashvili 2012].

As Georgia is a member of the World Trade Organization (WTO), it avails low rates on agricultural products, what can be clearly seen below (Fig. 6). The final bound duties as well as the most favored nation (MFN) duties are mostly the same 10–15% for nearly 70% of agricultural import values. Remaining 30% of products are varying between duty free, lower and the higher duties, which are set on imports of beverages and tobacco.

The very few remaining import tariffs on the EU side are not the main impeding factor for Georgian exporters, but the main reason of limited and not diversified Georgian exports is that the EU has very complicated trade related regulations and standards as well as legislative acts established by the EU member states. The EU non-tariff barriers, such as technical, sanitary and phyto-sanitary standards (SPS) as well as production, transportation, labeling (so-called Euro standards) and storage requirements etc. mainly cause serious impediments and make it harder for Georgian products to reach the EU single market [SACAC 2009].

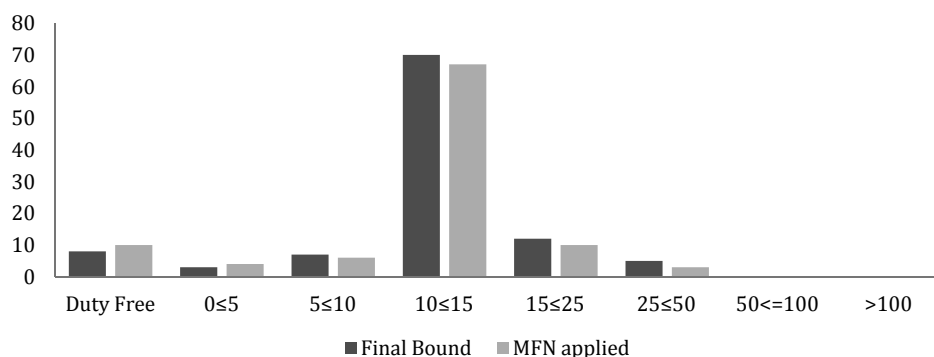


Fig. 6. Final bound duties and import values for agricultural products (percentage)
Source: World Trade Organization (<http://www.wto.org/>).

So, better access to the EU markets will mostly depend on how well and quickly Georgian exporters will adopt the EU standards and regulations, as while Georgia does not have a diversified export-oriented economy, adoption of the EU standards will surely help to establish new product lines, which might become competitive on the European markets.

The overall situation started to change after the Rose Revolution [UNDP Georgia 2008], followed by the range of reforms with the aim to promote new trends of economic development based on further integration of the country into the global world, by establishing international cooperation through free trade agreements (FTA) with Turkey and the nations of the Commonwealth of Independent States (CIS), and the Generalised scheme of preferences (GSP) agreements with the European Union and the United States.

In addition, Georgia is poised to establish Deep FTAs with the EU and US which would lead to the adoption of the EU regulations and quality standards, the export potential of Georgian agro-food products could improve and allow some products to seize larger market shares within the EU, which is the biggest market for agricultural products supplied mostly by developing countries.

In recent years trade with the EU member states gradually enlarged and the share of the EU countries in Georgia's total trade turnover is increasing year by year.

In the total EU imports about 25% of products are agricultural ones. The main products that Georgia exports to the EU are: fresh and dried hazelnuts, waters (pure mineral, with added sugar, sweetener or flavor), walnuts, vinegar, apple juice and fruit preparations, wine and non-alcoholic beverages. For the first time since 2007, Georgia has exported greens, honey and eucalyptus brooms to the EU.

At the same time, despite being an agricultural country, Georgia is unable to export other food and agricultural products, because Georgian producers cannot meet the SPS and requirements of the EU countries. What means that it is very important to found new approaches to attract potential investors, identify and adapt appropriate technology to provide farmers intellectual and physical tools, which they will need to meet existing standards, become more productive and profitable in competitive markets.

SWOT analysis

When share of agriculture in GDP amounts 8.8%, while historically have higher potential, it means that there are serious problems that need to be detected, investigated and eliminated. Table 3 presents the SWOT analysis will help to get clearer image about strengths, weaknesses, opportunities and threats of Georgian agricultural sector as a short result of research.

Table 3. SWOT analysis of Georgian agricultural sector

Strengths	Weaknesses
<ul style="list-style-type: none"> – Favorable natural resources and climate conditions – Strategically location on the “Silk Road” between Europe and Asia – Well established distribution networks to core CIS and EU markets – Existing preferences in trade with US and the EU countries and the WTO membership – Experienced and low cost labor – Recognition from government as a high priority sector 	<ul style="list-style-type: none"> – Low productivity and weak competitiveness (inefficient use of resources) – Lack of modern agricultural equipment – Outdated drainage and irrigation systems – Low level of agricultural education – Limited knowledge and access to information about potential markets – Low export and sales experience – Lack of long-term and cheap credits – Not fulfillment of SPS standards to export to EU markets – Lack of promotion abroad and domestically – Lack of investment
Opportunities	Threats
<ul style="list-style-type: none"> – Developing new competitive strategy for agro-food export – Upgrading agricultural equipment and improving infrastructure – Improving quality of higher agriculture education – Developing system to improve access to information – Strengthening agricultural research – Attracting potential investors – Increasing accessibility to cheap and long-term credits – Increasing market shares domestically and capturing new markets 	<ul style="list-style-type: none"> – Existing barriers to enter foreign markets – Low level of investment – High competition in global markets – High price competition of foreign products in domestic markets – Macroeconomic threats – High dependence on external energy sources – Demographic problems (ageing population, migration causing reduction of labor resources) – Political instability – Climate related problems

Source: Own elaboration.

CONCLUSIONS

The global population is growing and as a result of significant urbanization more than half of the world’s population lives in urban areas, what is affecting agricultural resources, land use and food distribution as a result raising demand for agricultural commodities.

Georgia traditionally is considered as an agrarian country. Its diverse climatic conditions and natural resource endowment allow production of a wide variety of agricultural products and favor competitive development of the sector, vital for country’s further maturation.

The loss of the main export market had an appalling impact on the whole agricultural sector. To overcome still existed negative effect, Georgian agricultural sector must substantially expand its export performance in global markets and became more diversified.

The potential for growth and diversification is very real as Georgia has good opportunities in this sector and comparative advantage within competitors, having good quality products plus low wage costs and strategically location. Georgian agro-food exports growth is obvious in nearest future, if appropriate improving changes will be done. It is important to develop a competitive strategy for exporting agro-products to international markets, where countries have different quality, taste, and food safety standards to those with which the Georgian industry was accustomed during long period of time.

For further, long-term prosperity Georgia needs to overcome existing weaknesses in the sector, develop effective strategy, attract potential investors, study the world market, be oriented on its requirements and extend demand of Georgian agricultural products abroad.

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HANDEL ZAGRANICZNY GRUZIŃSKIMI PRODUKTAMI ROLNYMI I POTENCJAŁ ICH EKSPORTU NA RYNEK UNII EUROPEJSKIEJ

Streszczenie. Niniejszy artykuł jest próbą wskazania znaczenia sektora rolnego i potencjału eksportowego produktów rolnych dla gospodarki gruzińskiej poprzez zaprezentowanie wyników historycznych oraz przegląd obecnych trendów. Rolnictwo gruzińskie jest w bardzo złej sytuacji, wykazuje małe nadwyżki oraz niski poziom produktywności. Jak wynika z badań Banku Światowego, około 83% populacji na obszarach wiejskich Gruzji jest zależne od gospodarstw socjalnych i konsumuje około 73% produkcji, a pozostałe produkty, które mogłyby stać się przedmiotem eksportu, napotykać liczne utrudnienia uniemożliwiające im sukces i przychody. Dla pozyskania nowych rynków alternatywnych, takich jak Stany Zjednoczone czy kraje Unii Europejskiej, niezbędne będą reformy strukturalne zapewniające wzmocnienie w Gruzji zrównoważonego wzrostu, zainteresowania inwestorów zagranicznych oraz poprawy ogólnej produktywności w sektorze, zmierzającej do dywersyfikacji eksportu oraz rozwoju sektora. Przy wykorzystaniu danych statystycznych możliwe jest zidentyfikowanie głównych partnerów eksportowych Gruzji, znaczenie poszczególnych sektorów i krajów docelowych z punktu widzenia całkowitego potencjału eksportowego oraz zmiany eksportu gruzińskich produktów rolnych na przestrzeni lat. Spadek udziału handlu rolnego w handlu ogółem z poziomu 28% w 2000 roku do 18% w 2012 roku pozostawia jasną perspektywę dalszego rozwoju, poprawy i większego wkładu do gospodarki krajowej.

Słowa kluczowe: sektor rolny, eksport produktów rolnych, obecne i potencjalne rynki eksportowe, standardy i regulacje UE, strefy wolnego handlu, reformy strukturalne

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