



Stakeholders' Forum on the Trout Sector

Dialogue Series on Agriculture and Rural Development

Kutaisi, Georgia
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Funded by the European Union
დაფინანსებულია ევროკავშირის მიერ


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Stakeholders' Forum on the Trout Sector in Western Georgia

ISET MA Program in Economics
Policy Institute
International School of Economics at Tbilisi State University



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Panelists

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ISET Policy Institute

Gocha Tsopurashvili

Ministry of Agriculture

Giorgi Misheladze

Agricultural Cooperatives Development Agency

Archil Fartsvania

Fishermen Association of Georgia

Manuchar Tsetskhladze

GeoVet, Senior Veterinarian

Framing Remarks

Lasha Lanchava

ISET-PI

Moderation

Nino Zambakhidze

*Georgian Farmers
Association*

Irakli

Kochlamazashvili

ISET-PI

Closing Remarks

Silvia Sanjuan

*CARE International in the
Caucasus*

Nino Kakulia

ISET-PI

This Dialogue Series

“In any intellectual inquiry, at least half the job consists in asking the right question...”

Albert Hirschman

The Strategy of Economic Development (1958)

This Dialogue Series

The goal of this dialogue series – to clearly visualize the obstacles faced by input suppliers, farmers, cooperatives, processors, market intermediaries, consumers, and exporters in agricultural value chains.

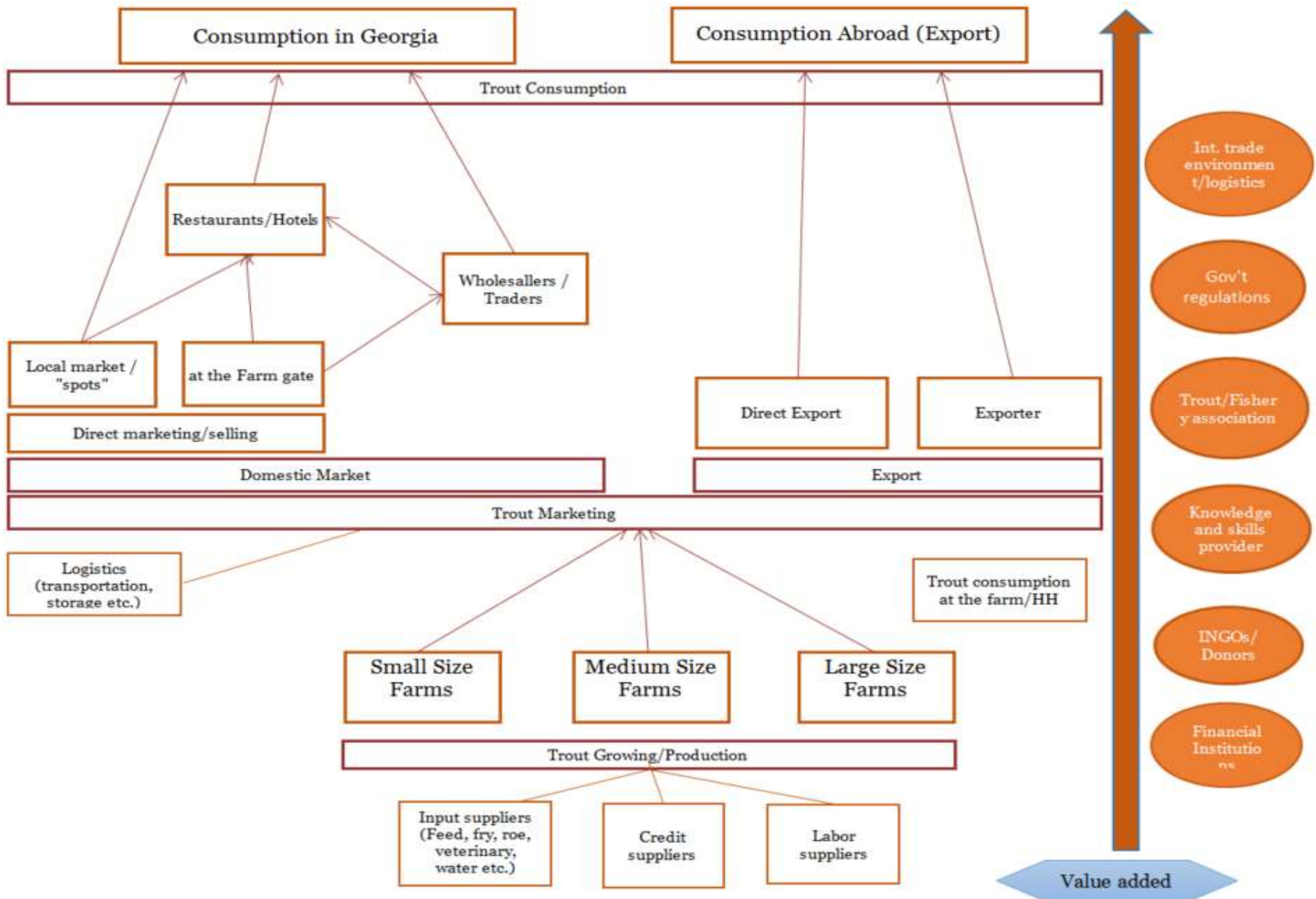
Our job – to hopefully ask the right questions!

Today's Dialogue: *The Georgian Trout Sector*

What are the biggest challenges and opportunities faced by all of the value chain actors in the trout sector?

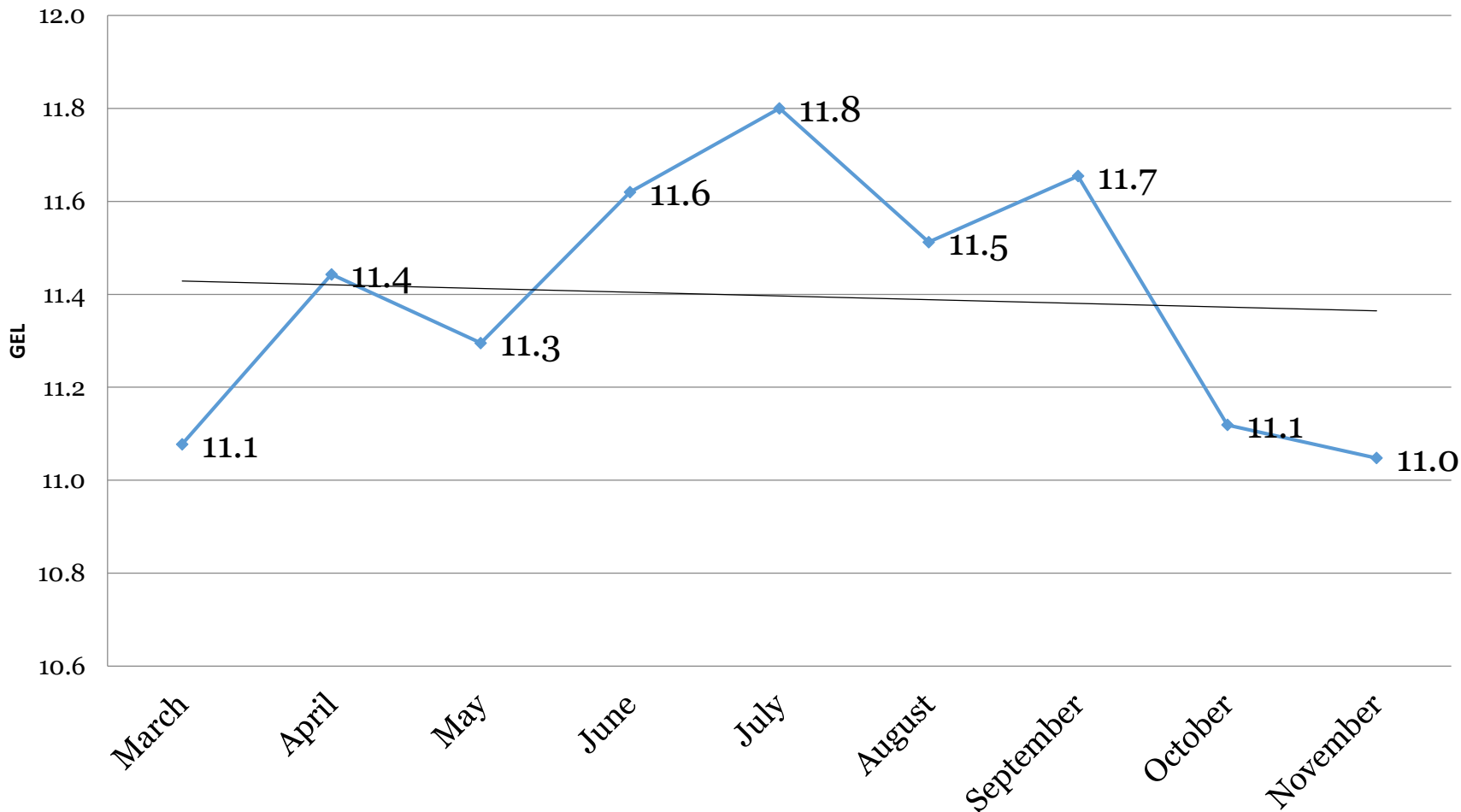


The Trout Value Chain



Average Retail Price of Trout in Georgia

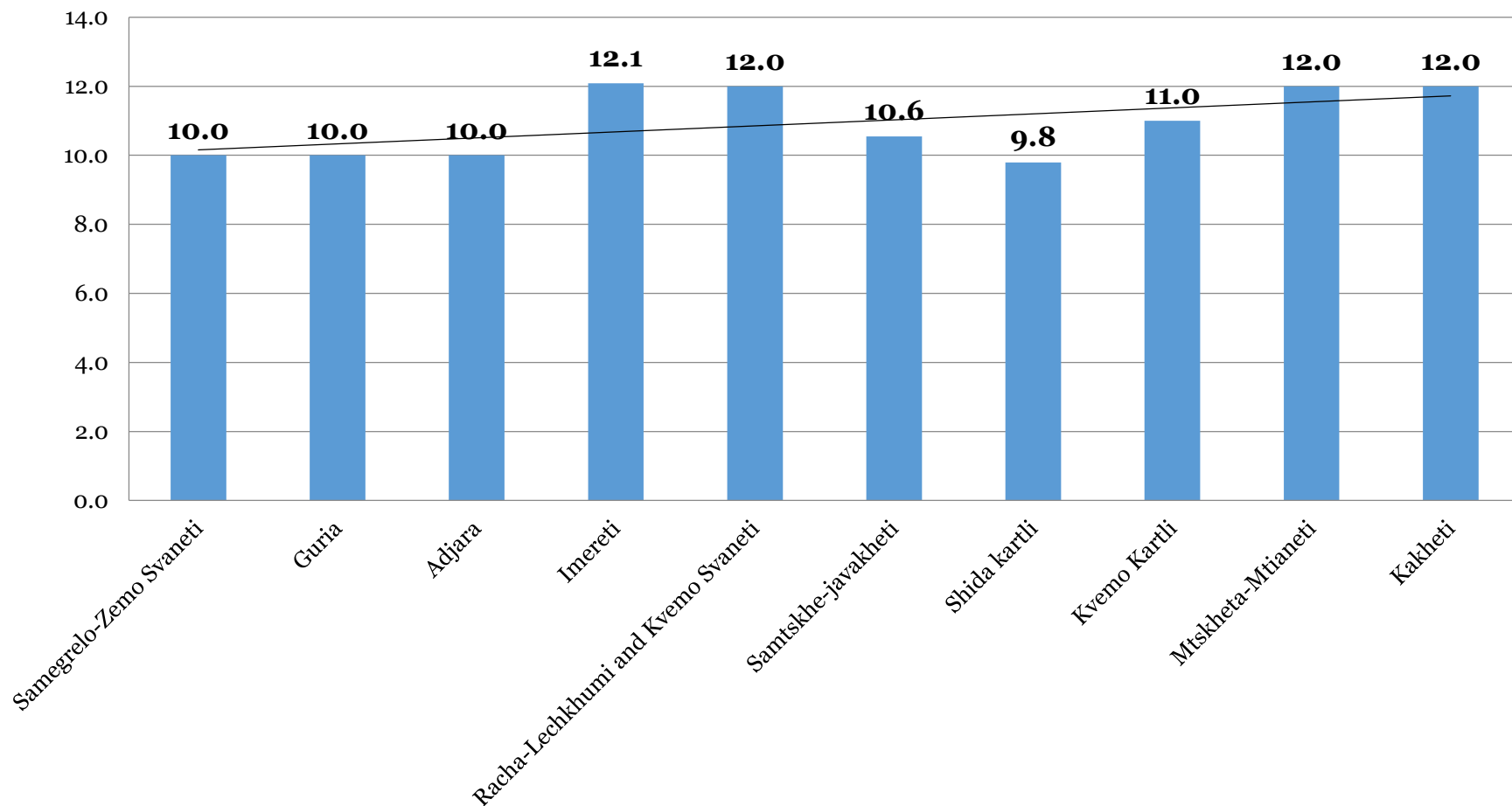
Average Price per 1 Kg Trout



Source: Market Price Information System developed by MoA, FAO and ISET-PI under ENPARD project

Average Retail Price of Trout across the regions of Georgia

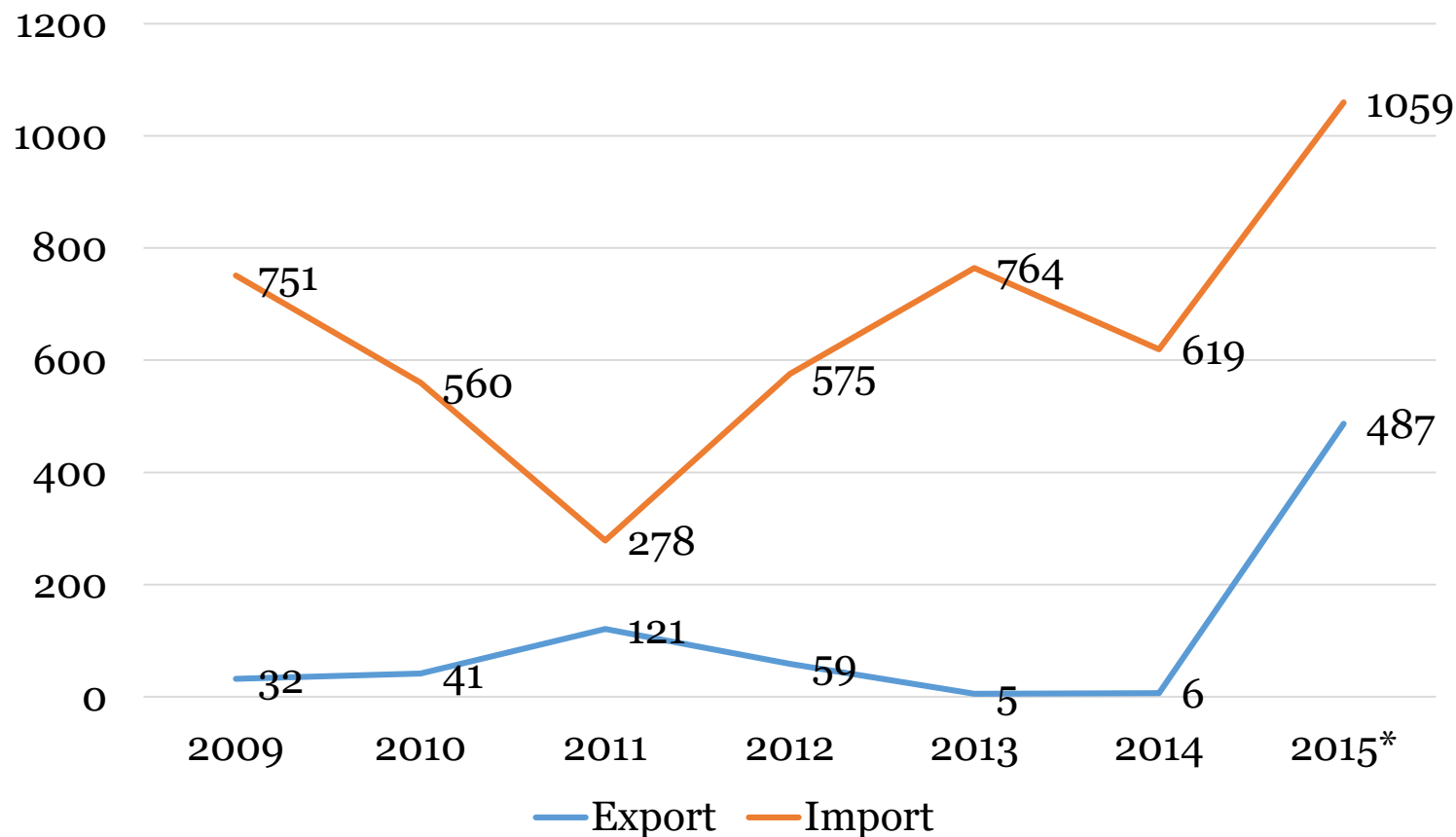
November, 2015



Source: Market Price Information System developed by MoA, FAO and ISET-PI under ENPARD project

The Georgian Trout Sector in Figures

All categories of Trout Trade
(Thousand USD)



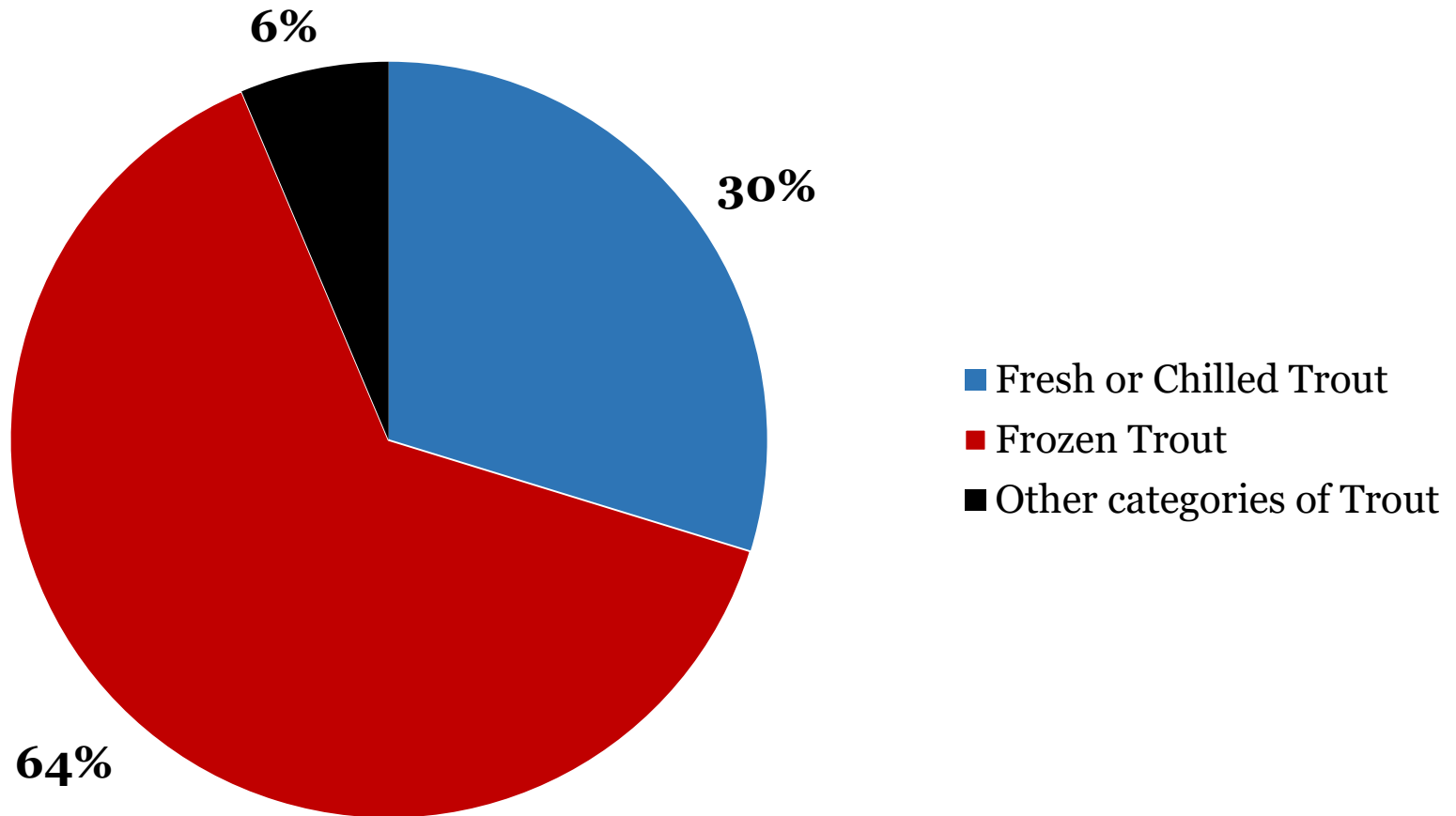
Source: National Statistics Office of Georgia. * 9 months data for 2015.

Top Trout Importing Countries

Imports	Value (Thousand USD)	Volume (Tons)
Norway	558.2	104.5
Chile	208.8	58.0
Denmark	161.2	78.1
Turkey	112.9	21.2
Other	18.3	1.2

Source: National Statistics Office of Georgia. * 9 months data for 2015.

Shares of each category of trout in the total Imports between 2009-2015*

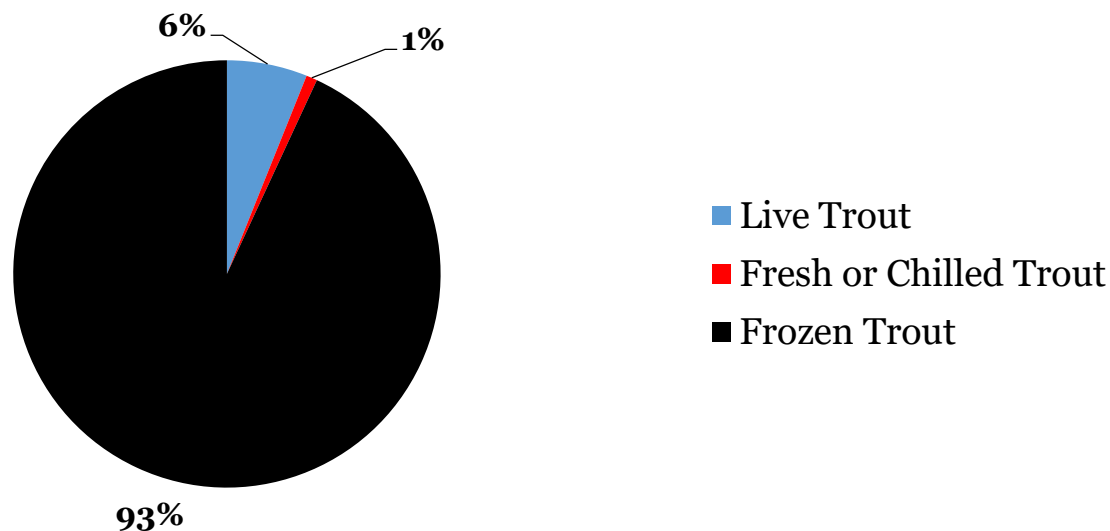


Source: National Statistics Office of Georgia. * 9 months data for 2015.

Trout Export Destination Countries

Exports	Value (thousand USD)	Volume (Tons)
Russia	475.9	80.3
Turkmenistan	10.7	3.6

Shares of each category of trout in the total exports
between 2009-2015*



Source: National Statistics Office of Georgia. * 9 months data for 2015.

The Trout Sector in Neighboring Countries

	Destination	
Exporting Countries	Russian Federation	World
Turkey	7805	60669
Armenia	5544	5552

Value of Exports in Thousands of USD

Summary

What we know...

Local production does not satisfy domestic demand

There is increasing demand on trout

Locally produced trout is not exported

There is lack of product diversification

Transportation and storage facilities are underdeveloped and in most cases non existent

There is no logistically well quipped trout farm that can supply the product in a stable manner to the exporter

Summary

What we know...

Trout feed is not produced locally and is imported from abroad

There is lack of locally produced fry, roe, medicine

Trout disease and water control system is underdeveloped

Trout cooperatives are being established and ENPARD already funded two of them (Guria and Racha Lechkhumi Kvemo Svaneti)

Topics for Discussion

Marketing

- What are potentials for Georgian trout sector:
 - Local markets
 - Export markets
 - European Union
 - Russia
 - Other

Topics for Discussion

Production

- What would make Georgian trout sector more competitive:
 - Locally produced feed, fry and roe
 - Product diversification
 - Bio trout

Topics for Discussion

- Where is value being added at each stage in the supply chain?
- How could farmers and agricultural cooperatives be further integrated into the trout value chain?
 - Cooperation in Input supply
 - Cooperation Trout marketing
- Trout and agro tourism