



GIEWS Country Brief Georgia

Reference Date: 06-June-2022

FOOD SECURITY SNAPSHOT

- Overall favourable weather conditions for 2022 wheat crop
- Above-average cereal output obtained in 2021
- Total cereal import requirements in 2021/22 forecast at below-average level
- Prices of wheat flour increased between December 2021 and May 2022
- War in Ukraine expected to negatively affect country's economy

Overall favourable weather conditions for 2022 wheat crop

Planting of the 2022 wheat crop, to be harvested between July and September, took place last November. According to satellite-based images, vegetation conditions were near-average across the country as of mid-May (VCI map). Precipitation amounts have been overall adequate during the season and yields are expected at near-average levels.

Planting of the 2022 maize crop, for harvest from August onwards, is ongoing under overall favourable weather conditions.

Above-average cereal output obtained in 2021

Harvesting of the 2021 cereal crops, mainly maize and wheat, finalized last September and the aggregate output is estimated at 436 000 tonnes, about 15 percent above the five-year average level. Production of maize is officially estimated at 233 000 tonnes, 10 percent above the average level due to favourable weather conditions during the season, which boosted yields. Similarly, the 2021 wheat output is set at a well above-average level of 136 000 tonnes due to high yields and large plantings.

Total cereal import requirements in 2021/22 forecast at below-average level

Total cereal import requirements in the 2021/22 marketing year (July/June) are forecast at a below-average level of 600 000 tonnes. Import requirements of wheat, which account on average for about 90 percent of the aggregate cereal import volume, are forecast below the five-year average level, at 550 000 tonnes, amid the harvest of a large output in 2021.

Georgia

Crop Calendar

(*major foodcrop)

Maize (spring)
Wheat (winter)

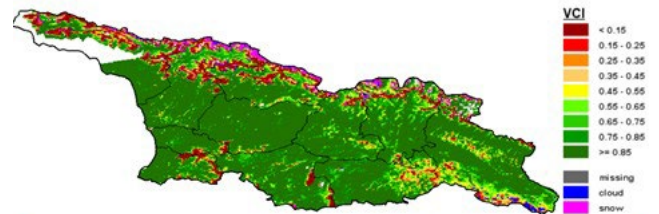


Sowing
Growing
Harvesting

Source: FAO/GIEWS.

Georgia - Vegetation Condition Index (VCI)

Dekad 2, May 2022



Source: FAO/GIEWS Earth Observation System.

Georgia

Cereal Production

	2016-2020 average	2020	2021 estimate	change 2021/2020
	000 tonnes			percent
Maize	209	255	233	-8.6
Wheat	107	102	136	32.9
Barley	50	45	58	28.4
Others	8	7	8	26.2
Total	373	409	436	6.4

Note: Percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Prices of wheat flour increased between December 2021 and May 2022

The national average retail prices of wheat flour increased by 23 percent between December 2021 and May 2022. Prices reached values well above the levels of May 2021, reflecting high export quotations from the Russian Federation, the main wheat supplier to the country.

Prices of potatoes, another important staple food, showed a declining trend between October 2021 and January 2022 and increased slightly afterwards. In May 2022, prices of potatoes were well above their levels a year before.

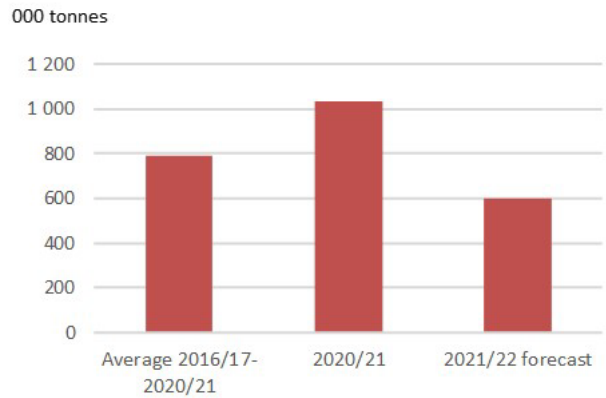
War in Ukraine expected to negatively affect country's economy

According to the [World Bank](#), the war in Ukraine is likely to adversely affect the country's economy through trade disruptions, reductions in tourism and remittances inflows, and elevated commodity prices. Domestic prices of crude oil and food have increased sharply since the beginning of the war in late February 2022 due to disrupted supplies from the Russian Federation and Ukraine. As a result, the pre-war forecast of a 5.5 percent annual Gross domestic production (GDP) growth in 2022 is expected to drop to 2.5 percent.

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Georgia

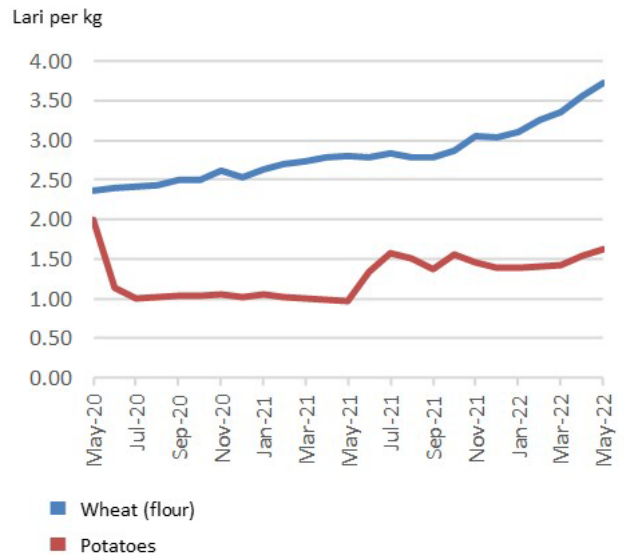
Cereals Imports



Notes: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).
Source: FAO/GIEWS Country Cereal Balance Sheets.

Georgia

Selected retail food prices



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Georgia

Reference Date: 27-July-2021

FOOD SECURITY SNAPSHOT

- Slightly below-average wheat output forecast in 2021
- Total cereal import requirements in 2021/22 forecast near-average volume
- Prices of wheat flour stable in June, while prices of potatoes increased

Slightly below-average wheat output forecast in 2021

Harvesting of the 2021 wheat crop is ongoing, while planting of the 2021 maize crop finalized in June and harvesting is expected to begin in August.

In some areas of southeastern Kakheti Province, where on average about 80 percent of the national annual wheat output is produced, precipitation amounts have been below average and temperatures have been warmer than the seasonal levels since May, with a likely negative impact on wheat yields. However, due to the large plantings, the 2021 output of wheat is expected at about 110 000 tonnes, near the five-year average level. By contrast, rainfall amounts have been adequate and well distributed in western areas of the country, where most of the maize crop is cultivated, supporting crop establishment and germination. The 2021 maize output is tentatively forecast at a near-average level of 210 000 tonnes.

Total cereal import requirements in 2021/22 forecast near-average volume

Total cereal import requirements in the 2021/22 marketing year (July/June) are forecast at near-average level of 800 000 tonnes. Import requirements of wheat, which account on average for about 90 percent of the aggregate cereals import volume, and maize, are both forecast near the five-year average volume, at 620 000 tonnes and 145 000 tonnes, respectively.

Prices of wheat flour stable in June, while prices of potatoes increased

Between December 2020 and May 2021, retail prices of wheat flour showed a rising trend. In June 2021, prices remained stable at levels well above those of one year earlier, reflecting higher export quotations from the Russian Federation, the main wheat supplier to the country.

Georgia

Crop Calendar

(*major foodcrop)

Maize (spring)
Wheat (winter)



Sowing
Growing
Harvesting

Source: FAO/GIEWS.

Georgia

Cereal Production

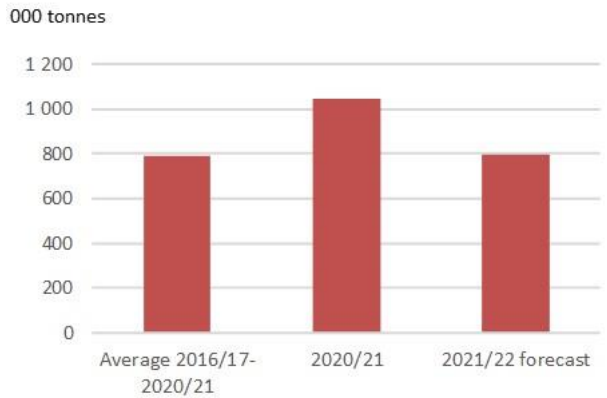
	2016-2020 average	2020	2021 forecast	change 2021/2020
	000 tonnes			percent
Maize	209	255	210	-17.6
Wheat	107	102	110	7.4
Barley	50	45	50	10.1
Others	8	7	8	26.2
Total	373	409	378	-7.6

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheet.

Prices of potatoes, another important staple food, remained quite stable between July 2020 and May 2021. In June 2021, potato prices increased sharply due to low availabilities ahead of the 2021 harvest.

Georgia

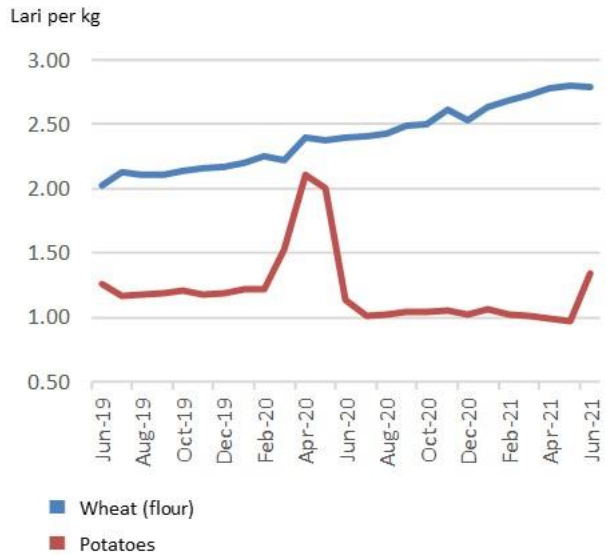
Cereals Imports



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).
Source: FAO/GIEWS Country Cereal Balance Sheets.

Georgia

Selected retail food prices



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Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Georgia

Reference Date: 26-April-2021

FOOD SECURITY SNAPSHOT

- Favourable weather conditions for 2021 wheat crops
- Above-average cereal output obtained in 2020
- Total cereal import requirements in 2020/21 forecast well above-average volume
- Prices of wheat flour in March higher than year before

Favourable weather conditions for 2021 wheat crops

Harvesting of the 2021 wheat crop, which was planted last November, is expected to take place between July and September. According to satellite-based imagery, precipitation amounts have been adequate and well distributed since the beginning of the season, benefitting soil moisture and resulting in near-average vegetation conditions as of mid-April.

Planting of the 2021 maize crop, to be harvested from August, is ongoing under overall favourable weather conditions.

Above-average cereal output obtained in 2020

Harvesting of the 2020 cereal crops finalized last September and the aggregate output is estimated at 419 000 tonnes, about 15 percent above the five-year average level. Production of maize is officially estimated at 263 000 tonnes, about 30 percent above average due to large plantings. By contrast, the 2020 wheat output is officially set at 101 000 tonnes, 10 percent below the average level due to low yields following scarce precipitation amounts during the season in the key producing southeastern Kakheti Region (where, on average, about 80 percent of the national annual wheat output is produced).

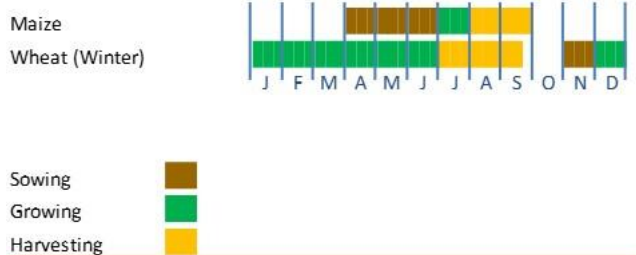
Total cereal import requirements in 2020/21 forecast at well above-average volume

Total cereal import requirements in the 2020/21 marketing year (July/June) are forecast at 1.2 million tonnes, well above the five-year average volume. Wheat import requirements, which account, on average, for about 90 percent of the aggregate cereals import volume, are forecast at about 950 000 tonnes, well above the five-year average level, following the below-average output obtained in 2020. Similarly, import requirements of maize are forecast at an above-average level of about 250 000 tonnes.

Georgia

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Georgia

Cereal Production

	2015-2019 average	2019	2020 estimate	change 2020/2019
	000 tonnes			percent
Maize	194	207	263	27.0
Wheat	112	101	101	0.6
Barley	49	54	46	-13.8
Others	9	7	8	13.9
Total	363	368	419	13.6

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

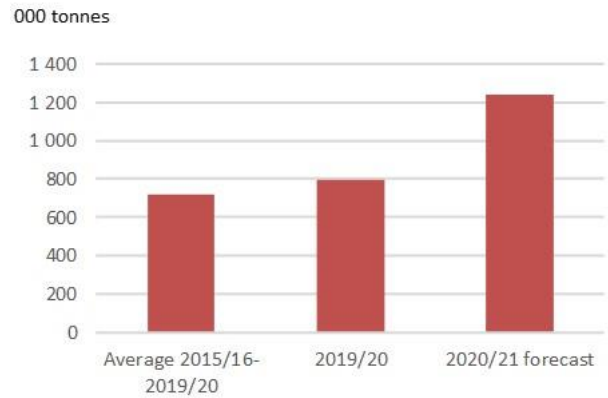
Prices of wheat flour in March higher than year before

Retail prices of wheat flour have been following an upward trend over the last two years and, in March 2021, they were well above their levels in the corresponding month a year earlier, reflecting higher export quotations from the Russian Federation, the main wheat supplier to the country, and a weaker local currency.

Prices of potatoes, another important staple food, remained overall stable or oscillated slightly between July 2020 and March 2021. In March 2021, potato prices were well below their levels in the corresponding month a year before due to the harvest of a year-on-year larger output.

Georgia

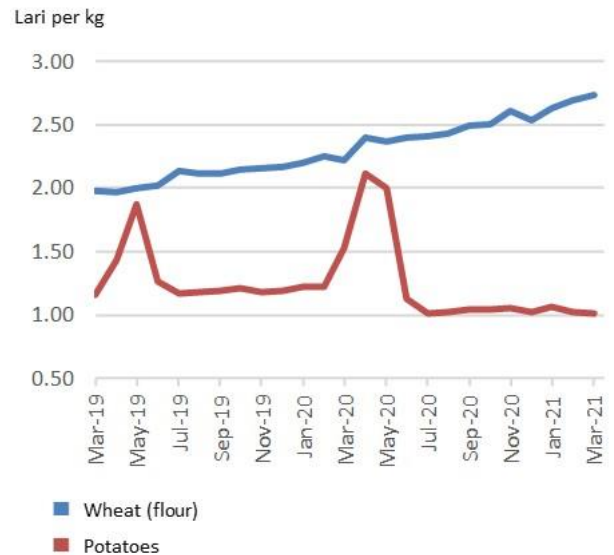
Cereals Imports



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).
Source: FAO/GIEWS Country Cereal Balance Sheets.

Georgia

Selected retail food prices



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Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Georgia

Reference Date: 20-October-2020

FOOD SECURITY SNAPSHOT

- Aggregate cereal production in 2020 estimated at below-average level
- Total cereal import requirements in 2020/21 forecast above-average volume
- Prices of wheat flour increased between June and September 2020

Aggregate cereal production in 2020 estimated at below-average level

Harvesting of 2020 cereal crops finalized in September and the aggregate output is estimated at about 320 000 tonnes, 12 percent below the average level. Production of maize is estimated at 170 000 tonnes, about 10 percent below the average level mostly due to the gradual reduction of planted areas over the last five years. Similarly, the 2020 wheat output is set at below-average level of 90 000 tonnes due to low yields following scarce precipitation during the season in the key producing southeastern Kakheti Region (where, on average, produces about 80 percent of the national annual wheat output).

Planting of the 2021 wheat crop, to be harvested from July next year, is expected to start in November.

Total cereal import requirements in 2020/21 forecast above-average volume

Total cereal import requirements in the 2020/21 marketing year (July/June) are forecast at 813 000 tonnes, about 10 percent above the average level. Wheat import requirements, which account, on average, for about 90 percent of the aggregate cereals import volume, are forecast at 600 000 tonnes, slightly above the five-year average level following the reduced output obtained in 2020. Similarly, import requirements of maize are forecast at an above-average of 190 000 tonnes.

Prices of wheat flour increased between June and September 2020

Retail prices of wheat flour, after the steep increases recorded in April 2020 due to strong consumer demand amid the COVID-19 pandemic, decreased in May as a result of temporary price control mechanisms put in place by the Government ([FPMA Food Policies](#)). Between June and September, prices increased slightly and reached levels well above those in September a year earlier,

Georgia

Crop Calendar

(*major foodcrop)

Maize

Wheat (Winter)



Sowing

Growing

Harvesting

Source: FAO/GIEWS.

Georgia

Cereal Production

	2015-2019 average	2019	2020 estimate	change 2020/2019
	000 tonnes			percent
Maize	194	207	170	-17.9
Wheat	112	101	90	-10.5
Barley	49	54	50	-6.5
Others	9	7	8	13.9
Total	363	368	318	-13.6

Note: percentage change calculated from unrounded data.

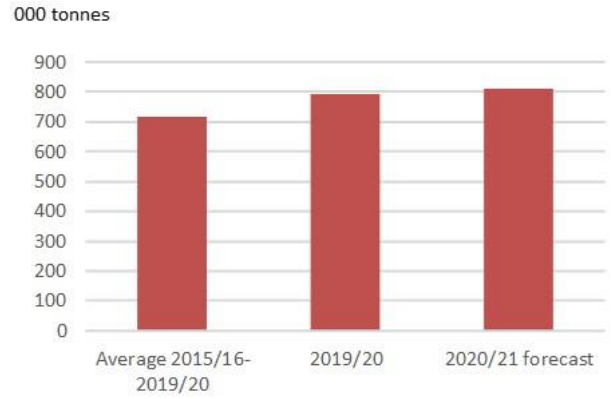
Source: FAO/GIEWS Country Cereal Balance Sheet.

reflecting higher export quotations from the Russian Federation, the main wheat supplier to the country, and a year-on-year reduction in the domestic output.

Prices of potatoes, another important staple food, strongly declined between May and July 2020, with the arrival to the markets of the newly harvested tubers. Prices slightly increased in August and September, in line with seasonal trends.

Georgia

Cereals Imports

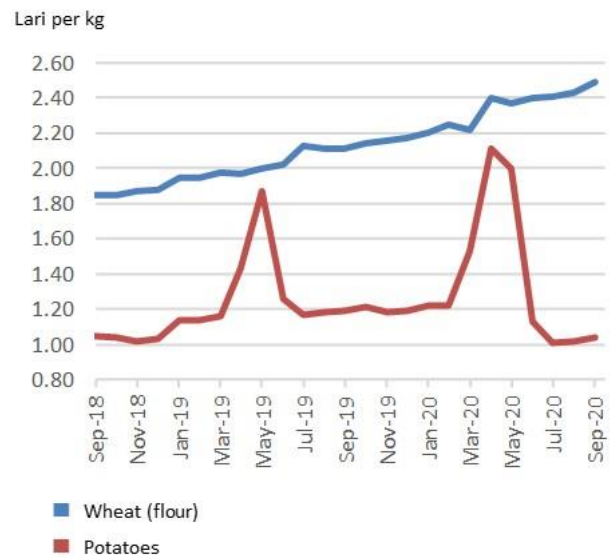


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Georgia

Selected retail food prices



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Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Georgia

Reference Date: 26-June-2020

FOOD SECURITY SNAPSHOT

- Below-average vegetation conditions in some key wheat producing areas
- Wheat import requirements in 2020/21 forecast slightly below-average volume
- After surging in April, prices decreased in May, weighed by Government measures

Below-average vegetation conditions in some key wheat producing areas

Harvesting of the 2020 winter wheat crop, planted last September and October, is expected to begin in July. Scarce precipitation during the season in the southeastern Kakheti Region (which produces, on average, 80 percent of the national annual wheat output) resulted in below-average vegetation conditions in mid-June, according to remote sensing imagery (see ASI map). As a result, the 2020 production of wheat is forecast at 90 000 tonnes, 20 percent below the average level.

Planting of the 2020 maize crop, mainly grown in Kakheti, Samegrelo-Zemo Svaneti and Imereti regions, is nearing completion and harvesting of early-planted crops is expected to start in August. Given that the area planted has been gradually decreasing over the last five years, the 2020 early forecast of maize output is estimated at a below-average level of 170 000 tonnes.

The aggregate 2020 cereal production is preliminarily forecast at about 320 000 tonnes, about 12 percent below the average level.

Wheat import requirements in 2020/21 forecast slightly below-average volume

Total cereal import requirements in the 2020/21 marketing year (July/June), are forecast at 682 000 tonnes, slightly below the average level. Wheat import requirements, which account, on average, for about 90 percent of the aggregate cereals import volume, are forecast at 600 000 tonnes, just below the five-year average level on account of the favourable outputs obtained over the last two years.

Georgia

Crop Calendar

(*major foodcrop)

Maize

Wheat (Winter)



Sowing

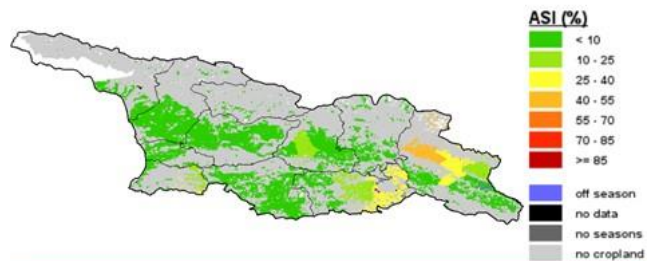
Growing

Harvesting

Source: FAO/GIEWS.

Georgia - Agricultural Stress Index (ASI)

from start of season 1 to dekad 2, June 2020



Source: FAO/GIEWS Earth Observation System.

Georgia

Cereal Production

	2015-2019 average	2019	2020 forecast	change 2020/2019
	000 tonnes			percent
Maize	194	207	170	-17.9
Wheat	112	101	90	-10.5
Barley	49	54	50	-6.5
Others	9	7	8	13.9
Total	363	368	318	-13.6

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

After surging in April, prices of wheat flour decreased in May, weighed by Government measures

Retail prices of wheat flour decreased slightly in March amid Government's efforts to control prices of wheat products, while they increased steeply in April, mainly due to an uptick in consumer demand following the outbreak of the COVID-19 pandemic. In May, prices decreased slightly as a result of the temporary emergency price control mechanisms put in place by the Government to avert the price increases of a number of food items ([FPMA Food Policies](#)).

Prices of potatoes, another important staple food, increased steeply between March and April 2020, due to stronger consumer demand amid concerns over the pandemic, which exacerbated seasonal trends. In May, prices decreased, but remained well above their levels a year before.

COVID-19 and measures adopted by the Government

In response to the COVID-19 pandemic, the Government declared the State of emergency on 23 March 2020, taking a number of measures, including implementing temperature-screening procedures, closing borders to non-nationals, imposing lockdown, curfews, quarantine and self-isolation measures, restricting movements within the country, prohibiting gatherings of more than ten people and suspending public transportation.

To ensure an adequate availability of domestic supplies, the Government launched a programme to support wheat imports. According to the programme, traders receive a subsidy of USD 40 per tonne of imported wheat and agree to sell a 50 kg bag of flour at no more than GEL 51, equivalent to about USD 16 ([FPMA Food Policies](#)).

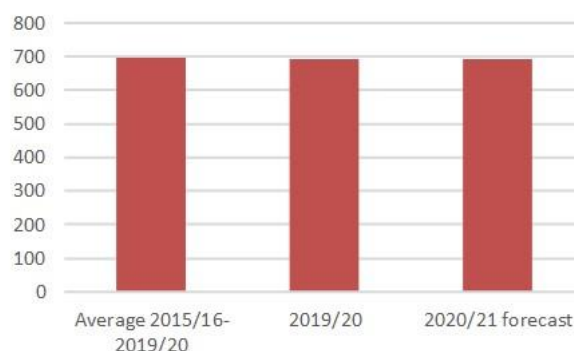
Temporary emergency price control mechanisms have been introduced on imported food items, including rice, buckwheat, wheat grain and flour, pasta, sunflower oil, sugar, milk powder and legumes.

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Georgia

Cereals Imports

000 tonnes



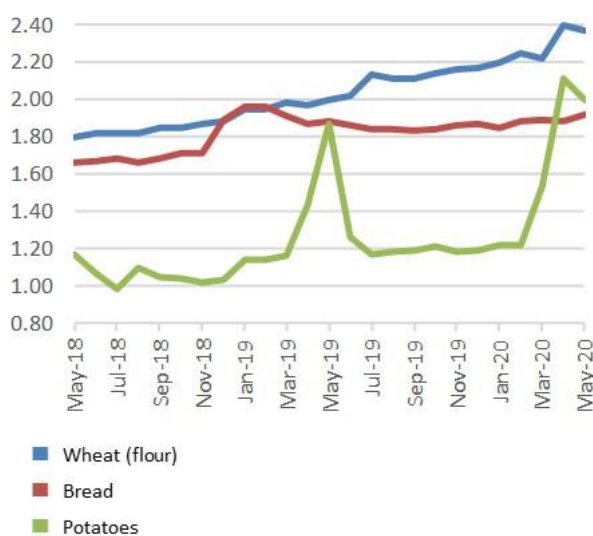
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Georgia

Selected retail food prices

Lari per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Georgia

Reference Date: 20-March-2020

FOOD SECURITY SNAPSHOT

- Favourable conditions of 2020 winter cereals
- Cereal import requirements in 2019/20 forecast slightly below-average volume
- Prices of wheat flour increased over last months

Favourable conditions of 2020 winter cereals

Planting of the 2020 winter grain crops, mainly wheat, finalized in October 2019 and crops will be harvested from July. According to remote sensing data, as of early March, conditions of crops were generally favourable in most croplands.

Planting of the 2020 maize crops, for harvest in August and September, is expected to start in April.

Harvesting of 2019 cereal crops was completed in September last year and the aggregate output is estimated at about 315 000 tonnes, 15 percent below the average level. The result is on account of a reduced production of maize due to a gradual decrease in planted areas over the last seven years. Wheat output is estimated at 100 000 tonnes, close to the 2019 near-average level.

Wheat import requirements in 2019/20 forecast slightly below-average volume

Total cereal import requirements in the 2019/20 marketing year (July/June), are forecast at 683 000 tonnes, slightly below the average level. Wheat import requirements, which account on average for about 90 percent of the aggregate cereals import volume, are forecast at 600 000 tonnes, just below the five-year average level on account of the favourable outputs obtained over the last two years.

Prices of wheat flour increased over last months

Retail prices of wheat flour have been steadily increasing since September 2019 and, in February 2020, they were well above their levels a year before. The increase reflects the upward trend of export prices from the Russian Federation, the main wheat supplier to the country, which markedly rose between October 2019 and January 2020, and it is supported by the depreciation of the local currency.

Georgia

Crop Calendar

(*major foodcrop)

Maize

Wheat (Winter)



Sowing

Growing

Harvesting

Source: FAO/GIEWS.

Georgia

Cereal Production

	2014-2018 average	2018	2019 estimate	change 2019/2018
	000 tonnes			percent
Maize	211	194	157	-19.2
Wheat	101	107	100	-6.6
Barley	43	58	50	-13.3
Others	9	8	8	0.0
Total	365	367	315	-14.2

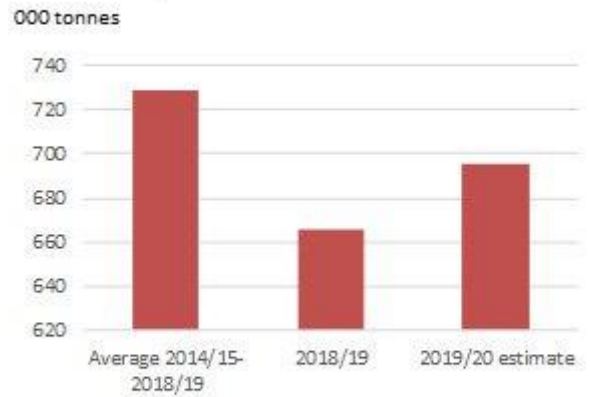
Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Prices of potatoes, another important staple food, decreased in November 2019, increased in the following two months and remained stable in February 2020, at levels 7 percent above those in the corresponding month a year before, due to a year on year reduction in volume and quality of the tubers.

Georgia

Cereals Imports

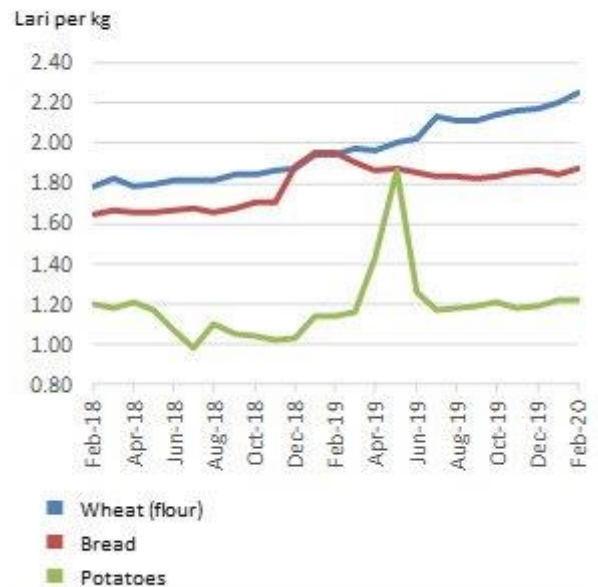


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Georgia

Selected retail food prices



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

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GIEWS Country Brief Georgia

Reference Date: 16-July-2019

FOOD SECURITY SNAPSHOT

- Below-average cereal production forecast in 2019
- Cereal import requirements in 2019/20 forecast below average volume
- Prices of wheat flour increased over last months

Below-average cereal production forecast in 2019

Harvesting of the 2019 winter wheat crop started in early July and is expected to finalize by mid-August.

Over the last months, precipitations have been overall adequate in Kakheti Region, which produces, on average, 80 percent of the national wheat output, benefiting the development of crops. As a result, production is forecast at near-average 100 000 tonnes.

The harvest of 2019 maize crops, mainly grown in Kakheti and Svaneti regions, will take place between August and September and, according to remote sensing data, crop conditions are near average. The output is forecast at about 150 000 tonnes, almost 30 percent below average due to a gradual decrease in planted areas over the last four years.

The aggregate 2019 cereal production is preliminarily forecast at about 300 000 tonnes, well below the average level.

Cereal import requirements in 2019/20 forecast below average volume

Total cereal import requirements in the 2019/20 marketing year (July/June), mostly wheat, are forecast at 670 000 tonnes, 10 percent below the average level.

Prices of wheat flour increased over last months

Retail prices of wheat flour have been following an upward trend over the last two years. Prices increased particularly between August 2018 and March 2019, reflecting the weakening of the national currency and high export quotations from the Russian Federation, which in February reached four-year high levels. Prices remained stable in April and rose again in May and June, supported by high transportation costs, as the country heavily

Georgia

Crop Calendar

(*major foodcrop)

Maize

Wheat (Winter)



Sowing

Growing

Harvesting

Source: FAO/GIEWS.

Georgia

Cereal Production

	2014-2018	2018	2019	change
	average			2019/2018
000 tonnes				
Maize	211	194	152	-21.7
Wheat	101	107	100	-6.6
Barley	43	58	45	-22.0
Others	9	8	8	0.0
Total	365	367	305	-16.9

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

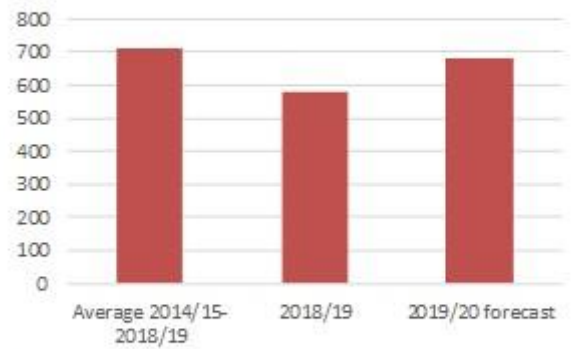
depends on imports to meet its wheat consumption requirements. Similarly, prices of bread have increased, particularly between November 2018 and January 2019, amid the rise of packaging costs. Prices were stable in February and declined afterwards, but remained at high levels.

Prices of potatoes, another important staple food, sharply increased between March and May 2019, reaching unprecedented high levels, amid shrinking supplies. Prices steeply declined in June, with the start of the harvest of 2019 crops.

Georgia

Cereals Imports

000 tonnes



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Georgia

Selected retail food prices

Lari per kg



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Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Georgia

Reference Date: 06-December-2018

FOOD SECURITY SNAPSHOT

- Cereal production in 2018 estimated below average
- Imports of cereals in 2018/19 marketing year expected below five-year average
- In October, prices of wheat flour were above their values of year before

Cereal production in 2018 estimated below five-year average level

Harvesting of wheat and maize finalized by the end of September. Total cereal production in 2018 is estimated at a below-average level of 353 000 tonnes, following a gradual decrease in the area planted over the last three years.

Maize output, about 50 percent of the total cereal production, is estimated in 2018 at 200 000 tonnes, 18 percent below the five-year average. Abundant precipitations throughout the growing season benefited plantings in the northwestern provinces of Svaneti, Samegrelo and Imereti (which account for more than half of the total maize planted areas) and allowed for a year-on-year rebound in yields, more than offsetting the decrease in the area sown. Wheat production is estimated at the near-average level of 100 000 tonnes, similar to the previous year.

Sowing of winter wheat, to be harvested between July and August 2019, finalized by the end of October under favourable weather conditions. In Kakheti Province (southeast of the country), where scarce precipitations were observed at the beginning of November, widespread rains in the remainder of the month benefited soil moisture.

Imports of cereals in 2018/19 marketing year expected below five-year average

Total import requirements in the 2018/19 marketing year (July/June) are forecast at about 730 000 tonnes, slightly below the five-year average. Wheat imports, which account for about 80 percent of total cereal requirements and cover about 90 percent of domestic consumption, are expected at 640 000 tonnes, about the same level as last year and 7 percent below the five-year average. Imports of maize are forecast at a near-average level of 80 000 tonnes, well below the previous year following the substantial production increase in 2018.

Georgia

Crop Calendar

(*major foodcrop)

Maize

Wheat (Winter)



Sowing

Growing

Harvesting

Source: FAO/GIEWS.

Georgia

Cereal Production

	2013-2017 average	2017	2018 estimate	change 2018/2017
	000 tonnes			percent
Maize	245	143	200	40.4
Wheat	96	98	100	2.1
Barley	39	44	45	2.5
Others	9	8	8	1.3
Total	388	292	353	20.8

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

The Russian Federation is expected to remain the main wheat supplier, although increased prices of Russian wheat flour make Kazakh wheat more competitive and might lead to an increase in the share of imports from Kazakhstan this year.

In October, prices of wheat flour were higher than year before

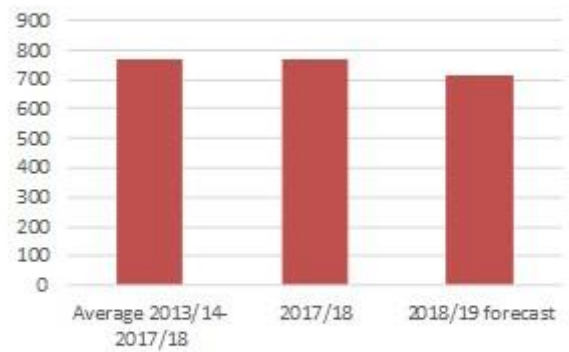
Domestic prices of wheat flour remained virtually unchanged in October compared to the previous month, but about 5 percent above their levels last year, mainly reflecting a year-on-year weaker local currency and high export quotations from the Russian Federation.

Prices of potatoes continued to seasonally decline in October and they were about 5 percent below their year-earlier levels.

Georgia

Cereals Imports

000 tonnes



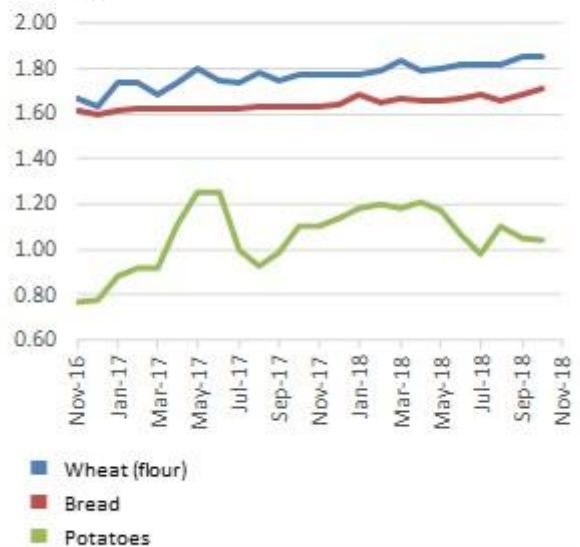
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Georgia

Selected retail food prices

Lari per kg



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

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GIEWS Country Brief Georgia

Reference Date: 29-May-2018

FOOD SECURITY SNAPSHOT

- Cereal production in 2018 forecast close to average
- Imports of cereals in 2018/19 expected below previous year's level
- In April, prices of wheat flour and potatoes above their values a year before

Cereal production in 2018 forecast close to average

Harvesting of winter wheat (which is mainly cultivated in eastern parts of the country) is expected to start in June. The level of precipitation has been adequate in most areas of the country over the last months and, according to satellite imagery, crops are generally in good conditions. Maize, which on average accounts for more than 50 percent of the total cereal production, is now being sown under favourable weather conditions. Assuming favourable weather for the remainder of the season and a year-on-year rebound in yields, the 2018 cereal production is forecast at 410 000 tonnes, nearly unchanged from the average level of the previous years and well above the low level of 2017.

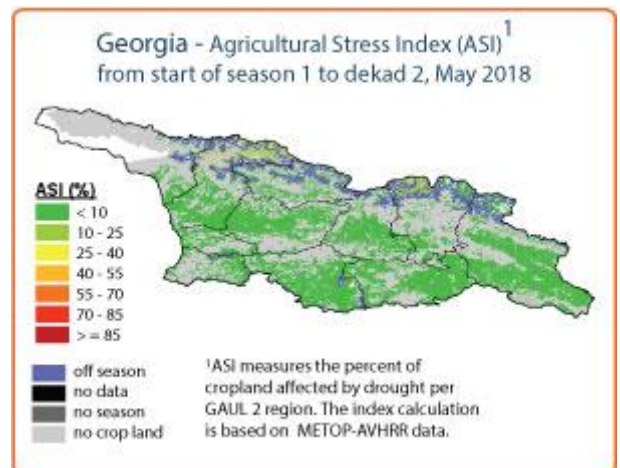
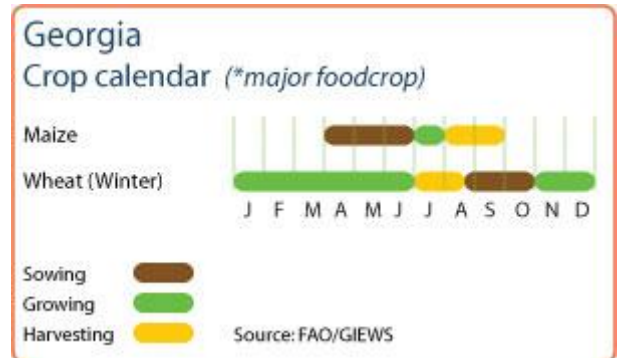
Imports of cereals in 2018/19 expected above previous marketing year

Cereals imports in the 2018/19 marketing year (July/June) are anticipated at below the previous year's level, and well below the five-year average. Wheat imports, which account for about 80 percent of the total cereal imports, are forecast at 550 000 tonnes, 8 percent below the 2017/18 level, following expectations of an increase in wheat output in 2018.

The country imports about 90 percent of its total domestic wheat consumption. Most of the wheat and wheat flour imports come from the Russian Federation.

Prices of wheat flour and potatoes above their previous year's level in April

Prices of wheat flour declined in April, but were still above their values a year earlier. Despite the ample availabilities of wheat in the subregion, domestic wheat flour prices were supported by a weak national currency, which makes imported goods more expensive.



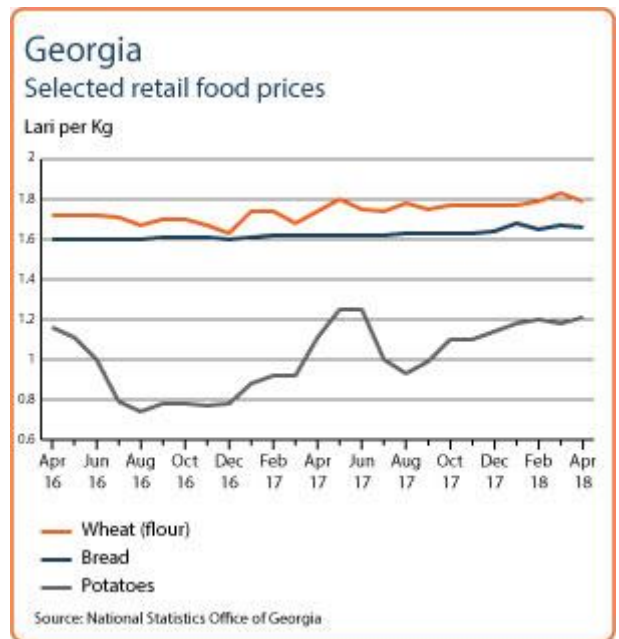
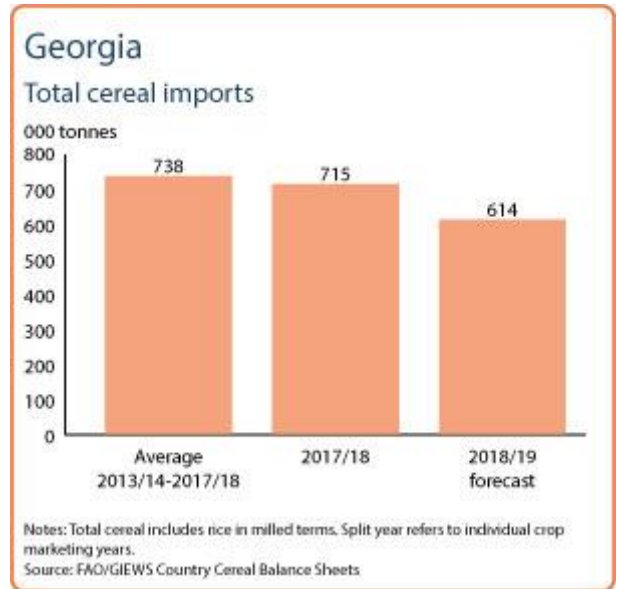
Georgia
Cereal production

	2013-2017 average	2017	2018 forecast	change 2018/2017
	000 tonnes			percent
Maize	246	146	240	64
Wheat	95	93	120	29
Barley	38	41	42	2
Others	9	8	8	0
Total	388	288	410	42

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Prices of potatoes increased in April and were 10 percent above their already high levels of a year before, following a decline in the subregional output in 2017.

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GIEWS Country Brief Georgia

Reference Date: 22-May-2017

FOOD SECURITY SNAPSHOT

- Total cereal production in 2017 anticipated to decline from last year's record level
- Imports of cereals in 2017/18 forecast above previous year's level
- Prices of wheat products and potatoes increased in April

Cereal production in 2017 forecast to decline from high level of previous year

The 2017 winter cereals (wheat and barley) are currently in the last stage of development and will be harvested from July. Maize, which on average accounts for more than 70 percent of total cereal production, is now being sown.

According to satellite imagery, the level of precipitation has been adequate in most areas over the last months. The only region with area, having more than 50 percent of cropland affected by the drought, is Kvemo Kartli (South-East of the country, see ASI map), which produces less than 10 percent of the total production of wheat and barley.

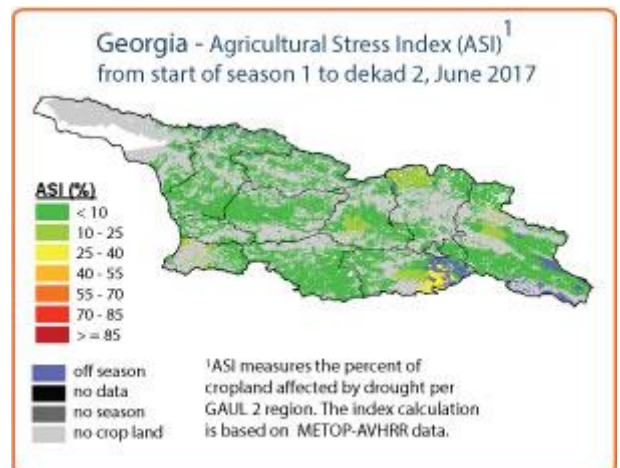
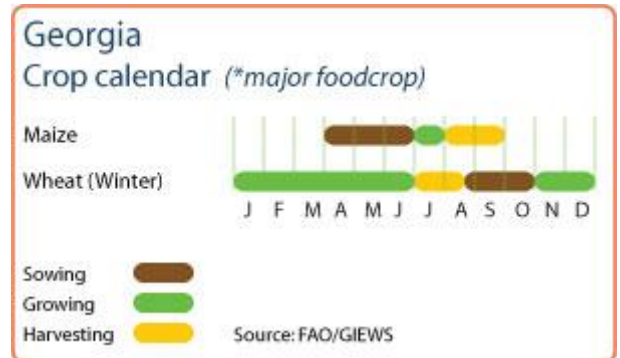
Assuming normal weather conditions for the remaining season and average yields, early the forecast for 2017 cereal production is set at 419 000 tonnes, about 16 percent below the exceptionally high level of the previous year. The decrease comes mainly from the smaller wheat production, which is forecast at 113 000 tonnes, more than a 40 percent decline from the record of 2016, when favourable weather helped to achieve high yields.

Imports of cereals in 2017/18 expected above previous marketing year

Cereals imports in the 2017/18 marketing year (July/June) are anticipated to increase from last year following an expectation of a smaller wheat production in 2017. Wheat imports, which account for about 80 percent of the total cereal imports, are forecast at 550 000 tonnes.

The country imports about 90 percent of its total domestic wheat consumption as local production is of low quality. Most of the wheat and wheat flour imports come from the Russian Federation.

Prices of wheat products and potatoes



Georgia
Cereal production

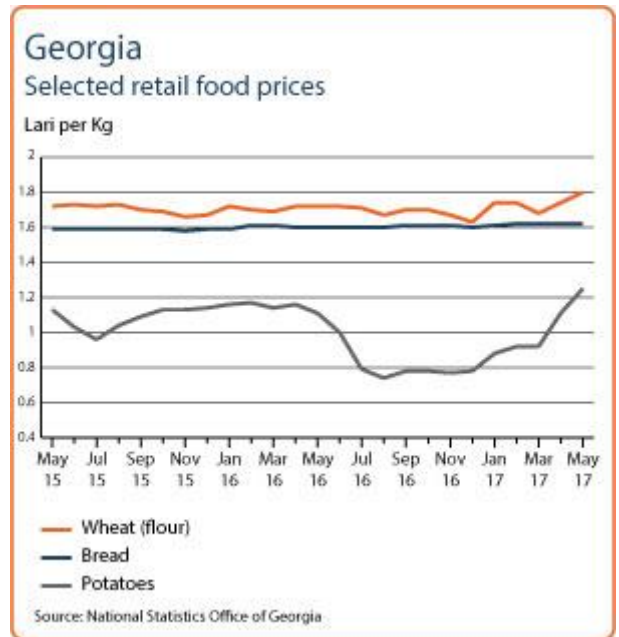
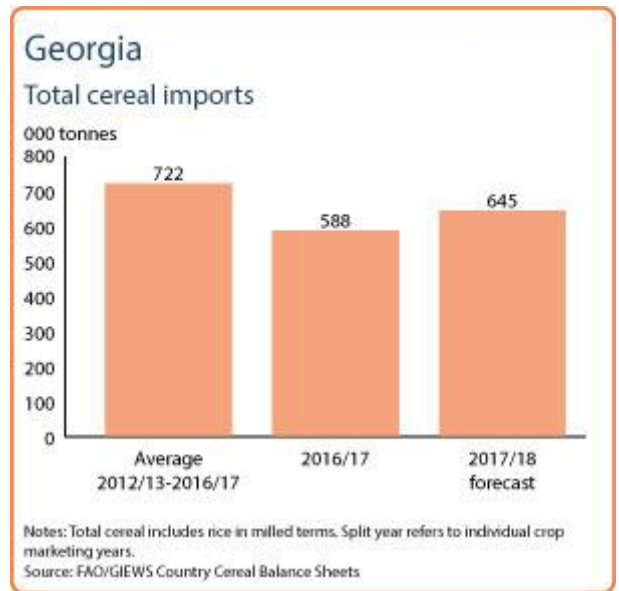
	2012-2016	2016	2017	change
	average			
	000 tonnes			percent
Maize	317	240	250	4
Wheat	109	200	113	-44
Barley	39	49	48	-2
Others	8	7	8	14
Total	472	496	419	-16

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

increased in April

Prices of wheat flour increased in April by around 4 percent, but were around their levels of three months ago and just 2 percent above their levels in April 2016. Despite the decline over the previous year in export prices, domestic wheat flour prices were supported by a weak national currency, which makes imported goods more expensive.

Prices of potatoes increased in April by more than 20 percent and were 40 percent above their levels of September 2016, despite a good local production in 2016.



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GIEWS Country Brief Georgia

Reference Date: 20-December-2016

FOOD SECURITY SNAPSHOT

- Total cereal production in 2016 anticipated at record level
- Imports of cereals in 2016/17 forecast close to previous year's level
- Prices of wheat products declined in November

Cereal production estimated to reach new record in 2016

Total cereal production is anticipated to reach a new record in 2016. Most of the increase is due to a well above-average wheat crop production, which is estimated to rise by 40 percent from the 2015 level. Wheat production is set at 200 000 tonnes in 2016, following increased planting area and very good yields. Similarly, maize output is expected to rebound in 2016 to 382 000 tonnes after the exceptionally low level in 2015 of 231 000 tonnes.

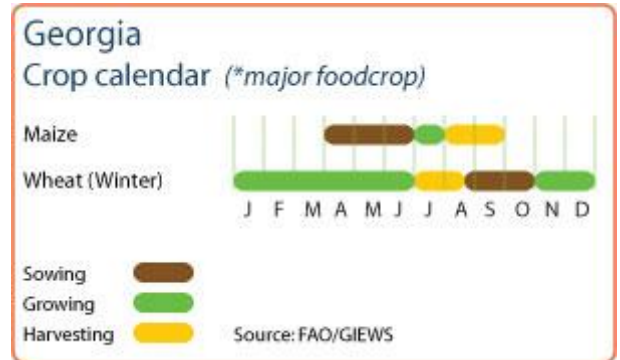
Planting of the 2017 winter wheat for harvest in July was completed by the end of October. Remote sensing data show above average precipitation levels in recent months, which is expected to benefit crop development.

Imports of cereals in 2016/17 expected close to those of previous marketing year

Cereals imports in the 2016/17 marketing year (July/June) are anticipated to remain close to last year despite a record high wheat production in 2016. The country imports about 90 percent of its total domestic wheat consumption as local production is of low quality. Most of the wheat and wheat flour imports come from the Russian Federation.

Prices of wheat products declined in November

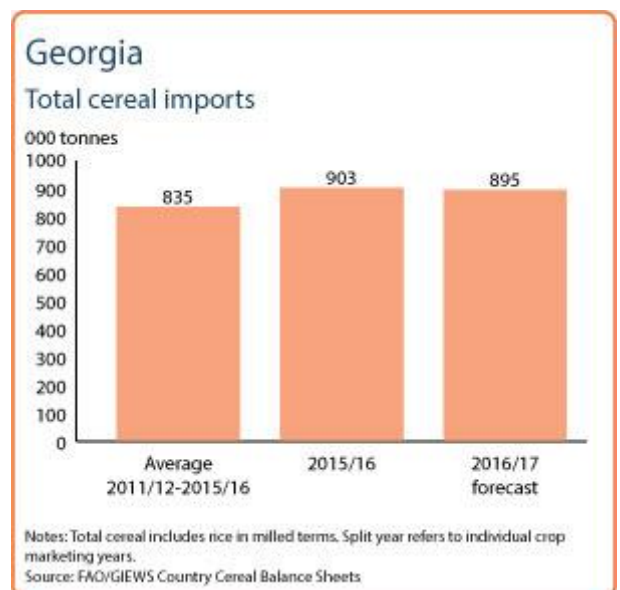
Prices of wheat flour declined in November by 2 percent and were around their levels at the same time a year earlier. Despite the record domestic wheat harvest, prices were prevented to decline further by the relatively high export quotations from the Russian Federation, the main supplier. Prices of potatoes declined in November and were 30 percent lower than their year-earlier levels following a good local production in 2016.



Georgia
Cereal production

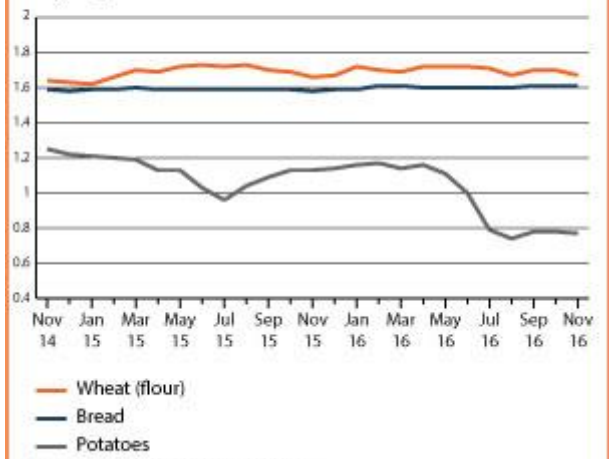
	2011-2015 average	2015	2016 estimate	change 2016/2015
	000 tonnes		percent	
Maize	342	231	382	65
Wheat	85	133	200	50
Barley	36	49	49	0
Others	7	10	7	-30
Total	470	423	638	51

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Georgia Selected retail food prices

Lari per Kg



Source: National Statistics Office of Georgia

Reference Date: 11-April-2016

FOOD SECURITY SNAPSHOT

- Total cereal production in 2016 anticipated to decline from 2015 level
- Imports of cereals in 2015/16 forecast close to previous year's level
- Prices of wheat products stable in March

Cereal production in 2016 anticipated to decline from 2015 record level

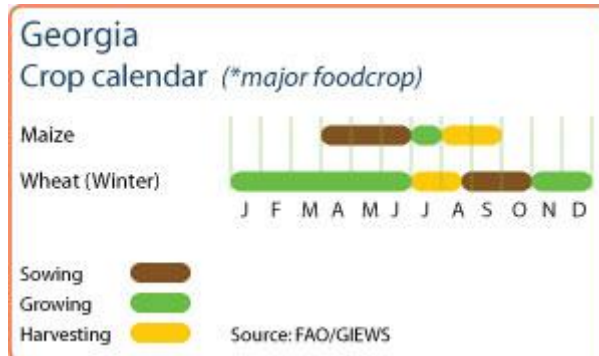
The 2016 winter wheat for harvest in July is well advanced, while the maize crop, accounting, in average, for about 77 percent of the total cereal production, is being sown. Recent remote sensing data show adequate precipitation levels in recent months. Assuming favourable weather in the remaining of the spring season and a return to normal yields from last year's record level, early forecasts for the 2016 wheat crop point to an output of 100 000 tonnes, just half of the exceptionally high production of last year. By contrast, outputs of maize and barley are expected to grow somewhat in 2016.

Imports of cereals in 2015/16 expected close to those of previous marketing year

Cereals imports are anticipated to remain unchanged from last year despite a record high wheat production in 2015. The country imports about 90 percent of its total domestic wheat consumption as local production is of low quality. It was reported that 80 percent of 2015 wheat production was feed quality. Most of the wheat imports come from the Russian Federation.

Prices of wheat products were stable in March

Prices of wheat flour and bread were stable in March and around their levels at the same time a year earlier, reflecting lower export quotations from the Russian Federation, the main supplier. Prices of potatoes declined in March and were 4 percent lower than their year-earlier levels, despite a reduced production in 2015.

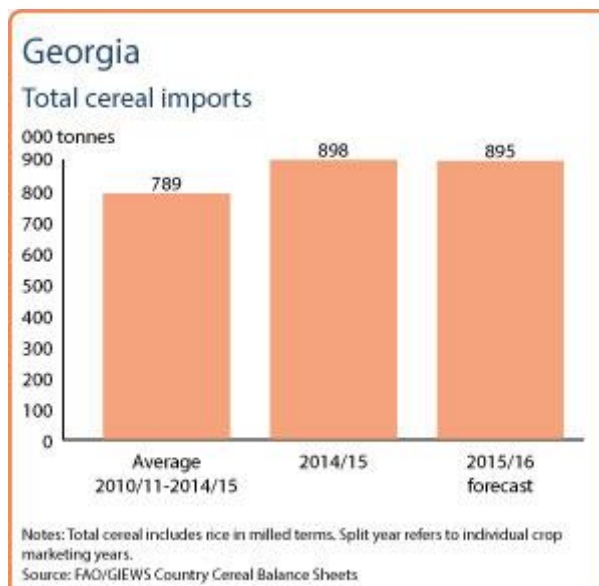


Georgia

Cereal production

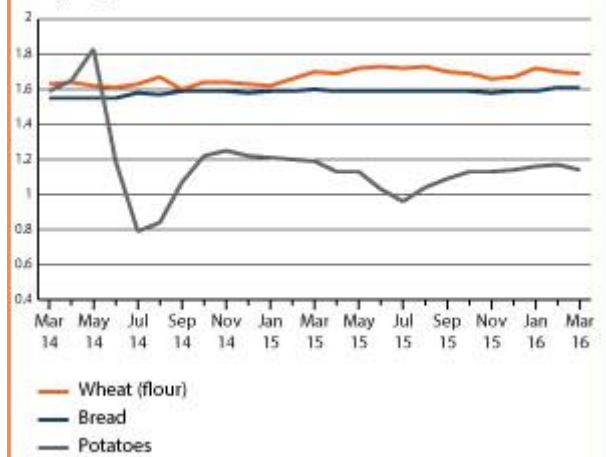
	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Maize	358	310	352	14
Wheat	100	210	100	-52
Barley	32	30	32	7
Others	7	7	7	0
Total	497	557	491	-12

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Georgia Selected retail food prices

Lari per Kg



Source: National Statistics Office of Georgia

Reference Date: 18-May-2015

FOOD SECURITY SNAPSHOT

- Cereal production in 2015 anticipated to increase from 2014 level
- Imports of cereals forecast to increase in 2014/15 marketing year (July/June)
- Prices of wheat products stable in April

Cereal production in 2015 anticipated to increase from 2014 reduced level

The 2015 winter cereals, mainly the minor wheat crop, is currently in the last stage of development and will be harvested from July, while the maize crop, accounting in average for about 77 percent of the total cereal production, is being sown. According to satellite imagery, soil moisture for planting operations and development of earlier planted crops are generally good following adequate precipitation in recent months. Assuming normal weather in the remaining of the spring season and a return to normal yields from last year's reduced level, early forecasts for the 2015 maize crop point to an output of 344 000 tonnes, 4 percent up from last year's level. Similarly, a good production for the 2015 wheat and barley minor crops is expected.

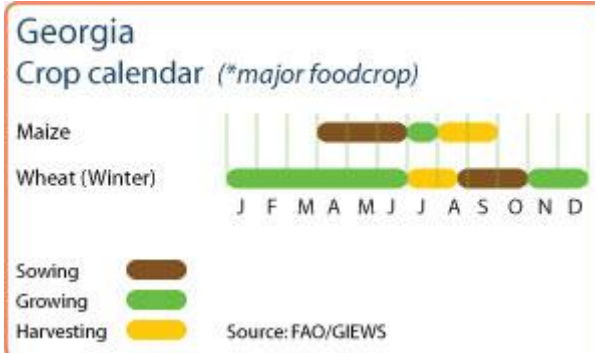
Imports of cereals is forecast to increase in 2014/15 marketing year (July/June)

The country covers some three-quarters of its domestic cereal consumption needs with imports, mainly wheat as local production is of low quality and mostly used for feed. About 90 percent of the wheat imports come from the Russian Federation.

Cereal imports are forecast to increase by 8 percent to 865 000 tonnes in the 2014/15 marketing year (July/June), as a result of a decrease in 2014 cereal output. Despite the increasing import volumes, the cereal import bill has remained around the previous marketing year's level due to lower international wheat prices.

Prices of wheat products were stable in April

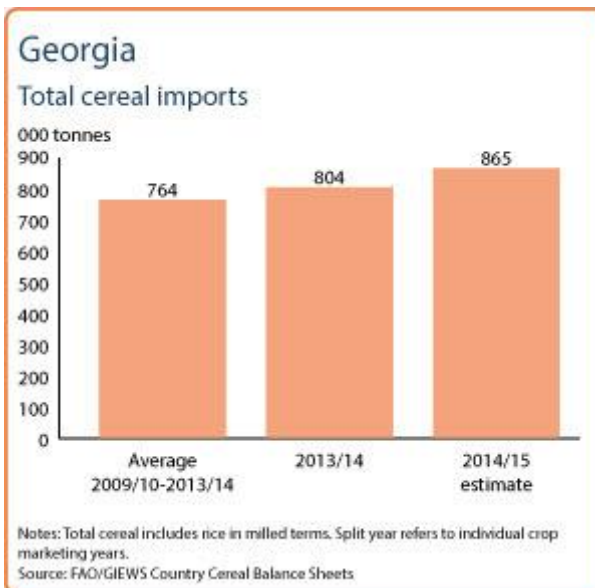
Prices of wheat flour and bread were stable in April and around their levels at the same time a year earlier. By contrast, prices of potatoes declined markedly and were one-third lower than their high levels a year earlier.



Georgia Cereal production

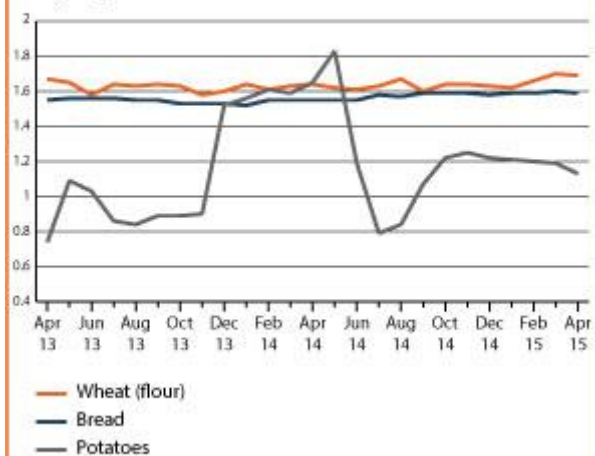
	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes			percent
Maize	333	330	344	4
Wheat	71	68	69	1
Barley	30	30	31	3
Others	7	7	7	0
Total	441	435	451	4

Note: percentage change calculated from unrounded data. Source: FAO/GIEWS Country Cereal Balance Sheets



Georgia Selected retail food prices

Lari per Kg



Source: National Statistics Office of Georgia

Reference Date: 24-July-2014

FOOD SECURITY SNAPSHOT

- The 2014 cereal production anticipated to decline
- Imports of cereals significantly increased in the 2013/14 marketing year (July/June)
- Prices of potatoes plummeted in June from the record level of the previous month

The 2014 cereal production anticipated to decline

Harvesting of the 2014 winter cereals, mainly the minor wheat crop, is currently ongoing while planting of the main maize crop, accounting in average for about 77 percent of the total cereal production, is to be gathered from August. The aggregated 2014 cereal output is expected to decrease by about 11 percent compared to the bumper crop of the previous year, following below average precipitations in mid-June and the first two dekads of July, which negatively affected crop development in parts. However, the 2014 production is still slightly above the five-year average, reflecting state support measures, mainly to improve irrigation infrastructure.

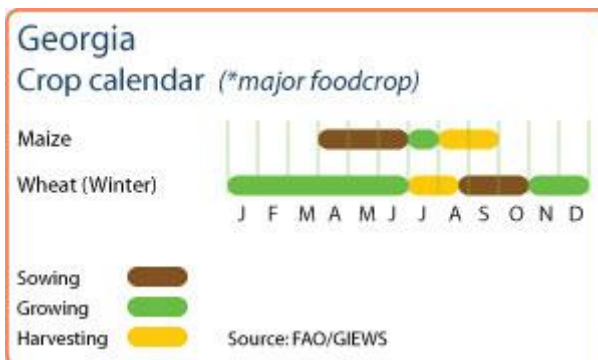
Imports of cereals significantly increased in the 2013/14 marketing year (July/June)

The country covers some three-quarters of its domestic cereal consumption needs with imports, mainly of wheat as local production is of low quality and mainly used for feed. About 90 percent of wheat imports come from the Russian Federation and Kazakhstan. In spite of last year's good cereal production, cereal imports are estimated to increase by 22 percent in the 2013/14 marketing year (July/June), driven by a build-up of stocks. Despite the increasing import volumes, the cereal import bill has remained around the previous marketing year's level due to lower international wheat prices.

Prices of potatoes in June plummeted from the record level of the previous month

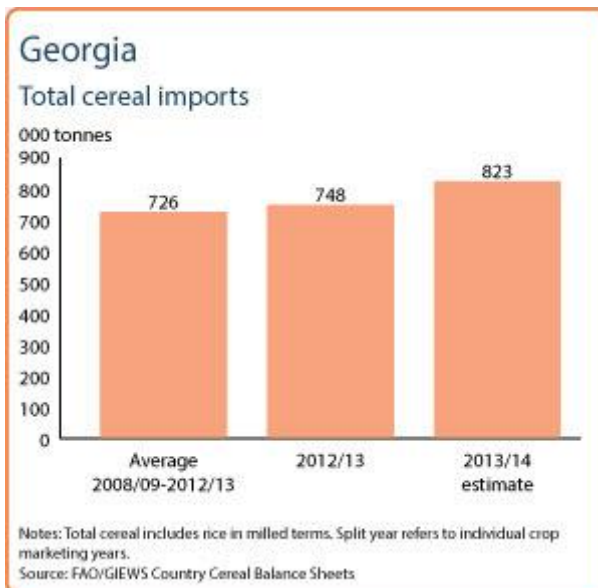
Annual general inflation and food inflation have been moderate in the past two years.

Prices of potatoes declined sharply in June from the record level of the previous month with the onset of the new harvest but remained 15 percent higher than a year earlier. Prices of wheat flour and bread were stable in June and around their levels at the same time a year earlier. However, prices of dairy products and vegetables went down in June, contributing to the month-on-month general deflation rate of the past month.



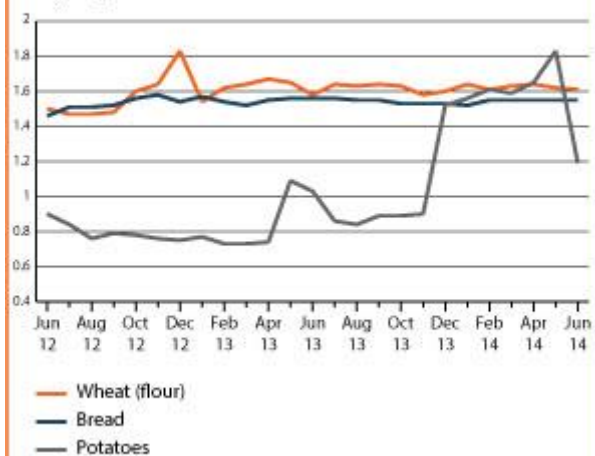
	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes			percent
Maize	334	400	350	-12
Wheat	69	75	68	-9
Barley	28	30	30	0
Others	7	6	7	17
Total	437	511	455	-11

Note: percentage change calculated from unrounded data. Source: FAO/GIEWS Country Cereal Balance Sheets



Georgia Selected retail food prices

Lari per Kg



Source: National Statistics Office of Georgia

Reference Date: 17-January-2013

FOOD SECURITY SNAPSHOT

- Early prospects for the 2013 wheat crop
- Good 2012 cereal harvest
- Import of cereals to significantly decline in the 2012/13 marketing year (July/June)
- Wheat flour prices increased significantly in the past months

Early prospects for the 2013 wheat crop are favourable

The planting of the 2013 winter cereals, mainly wheat, was completed under favourable weather conditions and crops are currently at dormant stage. Remote sensing data indicates that soil moisture is generally adequate so far. However, the main crop maize, accounting in average for about 74 percent of the total cereal production, is not planed until spring.

Good cereal harvest in 2012

Weather conditions in 2012 were generally satisfactory. The lack of rain observed in parts of Southern Georgia resulted in lower soil moisture, although overall this has not badly impacted the cereal output. This good harvest also reflects support measures implemented by the Ministry of Agriculture.

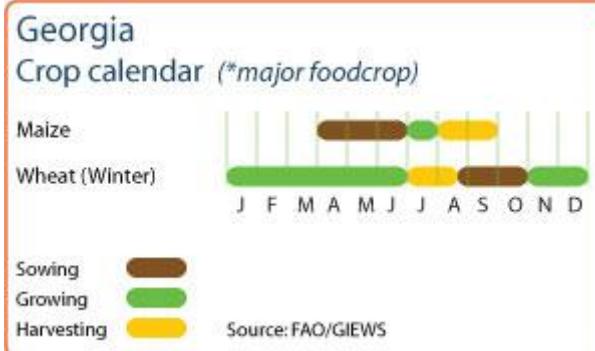
The aggregated cereal output was estimated 7 percent higher than in the previous year and well above the five-year average.

Import of cereals to significantly decline in the 2012/13 marketing year (July/June)

The country covers some three-quarters of its domestic cereal consumption needs with imports, mainly wheat, from Kazakhstan and the Russian Federation. In light of ample reserves from the previous year high volumes of imports and the good cereal production, imports are expected to decline in marketing year 2012/13 (July/June). Despite the reduction in import volumes, the cereal import bill is expected to increase because of higher international wheat prices.

Prices of wheat flour rose sharply in late 2012

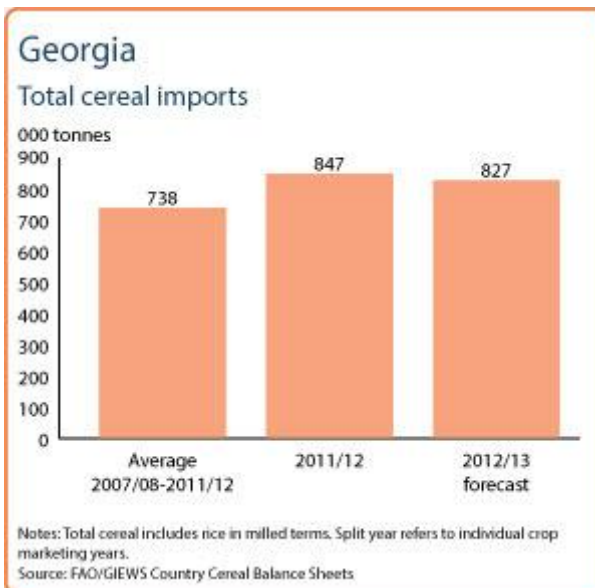
Prices of staple wheat flour increased significantly in the last three months of 2012 and in December they were 12 percent higher than at the same time a year earlier. The country imports some 90 percent of wheat to satisfy its consumption requirements. Prices of potatoes, another key food staple, in December 2012 were 24 percent lower than at the same time a year earlier and low, as a result of the good production last year.



Georgia
Cereal production

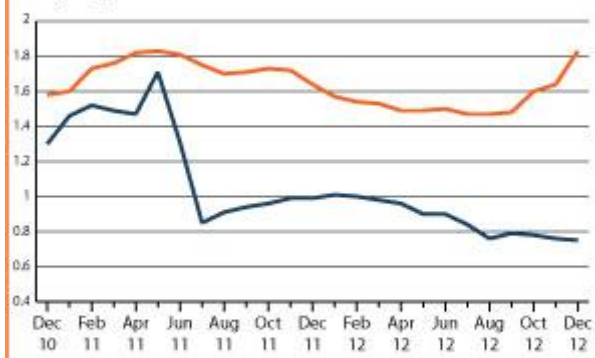
	2007-2011 average	2011	2012 estimate	change 2012/2011
	000 tonnes		percent	
Maize	279	270	315	17
Wheat	70	92	76	-17
Barley	33	30	30	0
Others	7	7	6	-14
Total	389	399	427	7

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Georgia Selected retail food prices

Lari per Kg



Source: National Statistics Office of Georgia

Reference Date: 28-September-2012

FOOD SECURITY SNAPSHOT

- Good 2012 cereal harvest
- Import of cereals to significantly decline in the 2012/2013 marketing year (July/June)
- In spite of stable food prices the food security of vulnerable groups is still fragile

Good cereal harvest in 2012

In general, weather conditions in 2012 were satisfactory. The lack of rain observed in parts of Southern Georgia has resulted in lower soil moisture, although overall this has not badly impacted the cereal output, even though wheat and barley yields were slightly lower than last year. The second consecutive good harvest is also the result of the support measures implemented by the Ministry of Agriculture, which established machinery and extension service centres to help farmers.

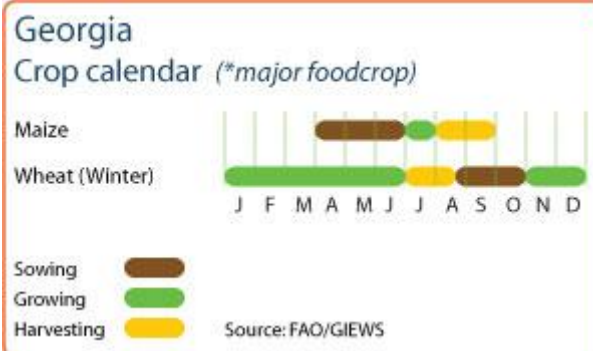
Wheat, barley, and maize production represent 18 percent, 7 percent and 74 percent of total cereal production respectively, and the aggregated cereal output is estimated to be well above the five-year average. The maize harvest has almost been completed while wheat and barley are mainly winter crops. The planting of winter crops is now underway and sowing conditions are satisfactory.

Import of cereals to significantly decline in the 2012/2013 marketing year (July/June)

The country covers around 80 percent of its domestic cereal consumption needs by imports, mainly wheat, from Kazakhstan and the Russian Federation. In light of accumulated reserves and high international prices cereal imports are expected to decline in marketing year 2012/13 (July/June) as a result of ample reserves from last year high volumes of imports. Despite the decline in imports, the cereal import bill is expected to increase because of higher international wheat prices.

In spite of stable food prices the food security of vulnerable groups is still fragile

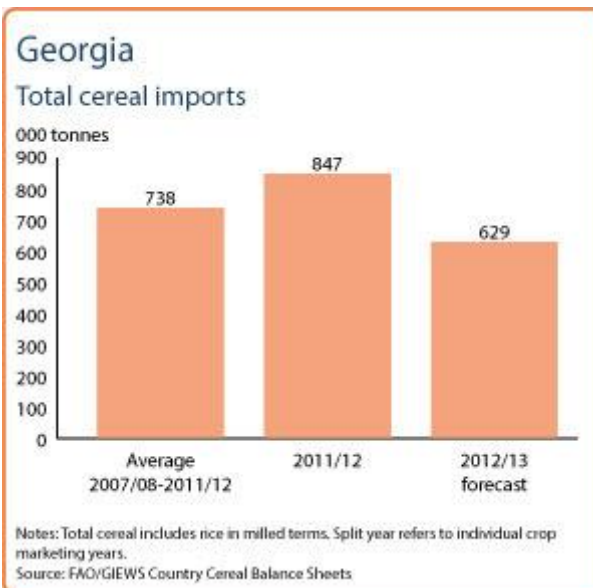
In August 2012, the domestic prices of staple foods remained stable, close to the level of a year ago (bread, pork, and mutton). A decrease of retail prices has been noted for wheat flour, milk, and potatoes. Bread and wheat flour prices reflect the overall decrease in import bills in the previous marketing year. According to official information from the Statistics Office of Georgia, the overall annual inflation rate for January to April 2012 was 7 percent, and food inflation was 1 percent. However, the poverty level in the country remains higher than it was in 2007, and there are 30 000 internally displaced persons who need government support to survive. In addition, the slowdown in economic growth in the country due to a deterioration external economic conditions and a decline of remittances from Russia,



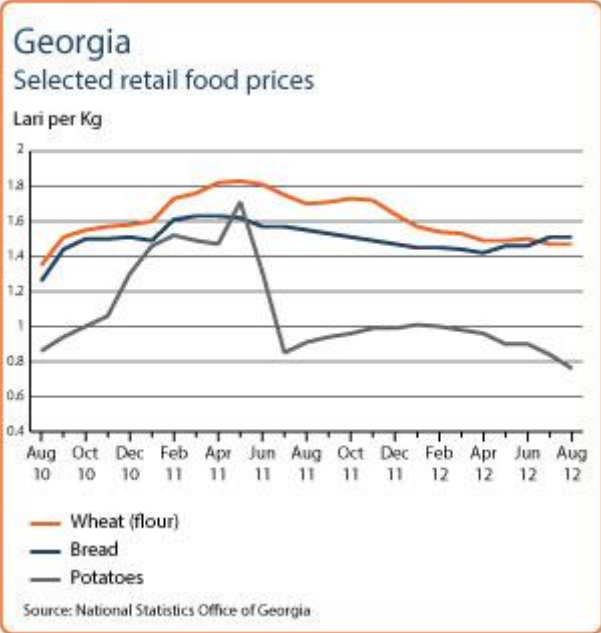
Georgia Cereal production

	2007-2011 average	2011	2012 forecast	change 2012/2011
	000 tonnes		percent	
Maize	279	270	315	17
Wheat	70	92	76	-17
Barley	33	30	30	0
Others	7	7	6	-14
Total	389	399	427	7

Note: percentage change calculated from unrounded data. Source: FAO/GIEWS Country Cereal Balance Sheets



Italy, and Greece has created concerns about the stability of the food security of vulnerable groups of the population who spend a large part of their incomes on food.



Reference Date: 28-May-2011

FOOD SECURITY SNAPSHOT

- Early forecasts point to an increase in cereal production in 2011
- Strong dependence on imports of cereals for domestic needs remains in 2010/11 marketing year (July/June)
- In April 2011 food prices increased by 28.6 percent on annual basis

Early forecasts point to an increase in cereal production in 2011

Sowing of the 2011 main spring maize crop is close to completion. The area planted is forecast to remain at last year's level. Growing conditions for cereal crops are reported to be adequate due to good precipitation in recent months. The cultivated area for winter crops has decreased due to low precipitation and inadequate soil moisture during the sowing season in the autumn 2010. Precipitation has improved since end-January 2011 though localized heavy rainfall during the first days of February produced flash floods in northern parts of Georgia. The overall vegetation of winter crops throughout the country does not look abnormal. Total 2011 cereal production (winter and spring crops) is expected to increase by some 11 percent, mainly reflecting higher maize production.

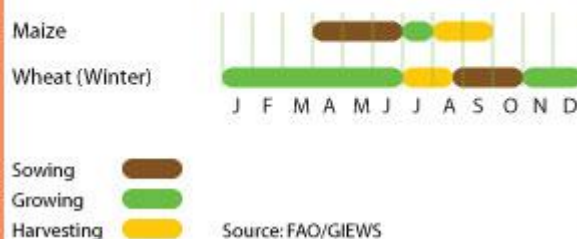
Strong dependence on imports of cereals for domestic needs remains in 2010/11 marketing year (July/June)

In marketing year 2010/11 (July/June), the country's cereal import requirements are estimated at 708 000 tonnes, around 67 percent of the cereal consumption needs. The bulk of these imports are in the form of wheat, production of which have been declining in recent years.

Food prices significantly increased

Bread and wheat flour prices reflect the overall trend of international wheat prices and increased import bills. According to official information from the Statistics Office of Georgia, the overall annual inflation rate in Georgia from April 2010 to April 2011 amounted to 13.5 percent. The highest contribution to this overall index comes from the price increases of food and non-alcoholic beverages which is 28.6 percent. The highest price increases were observed for wheat flour (almost 39 percent) and bread (31.5 percent) during the same period. The increase in food prices affects access to food by vulnerable groups of the population who spend a large part of their incomes on food.

Georgia Crop calendar (*major foodcrop)

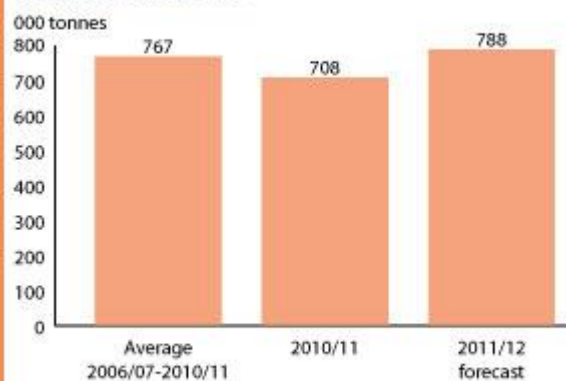


Georgia Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes			percent
Maize	269	200	230	15
Wheat	68	55	55	0
Barley	35	18	22	22
Others	8	8	8	0
Total	379	281	315	12

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

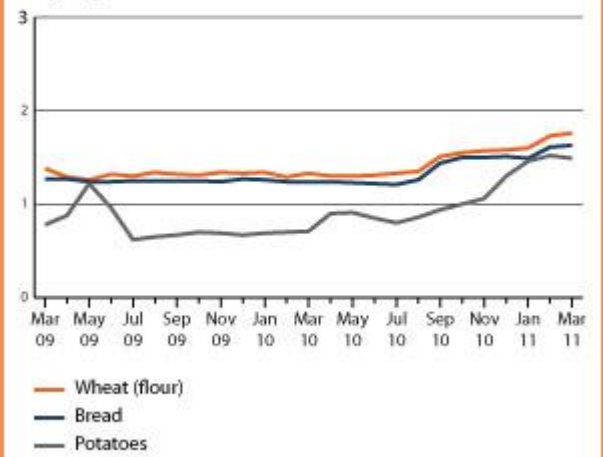
Georgia Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Georgia Selected retail food prices

Lari per kg



Source: National Statistics Office of Georgia