



Research

Hazelnut Production Sector In Georgia

Sector Snapshots

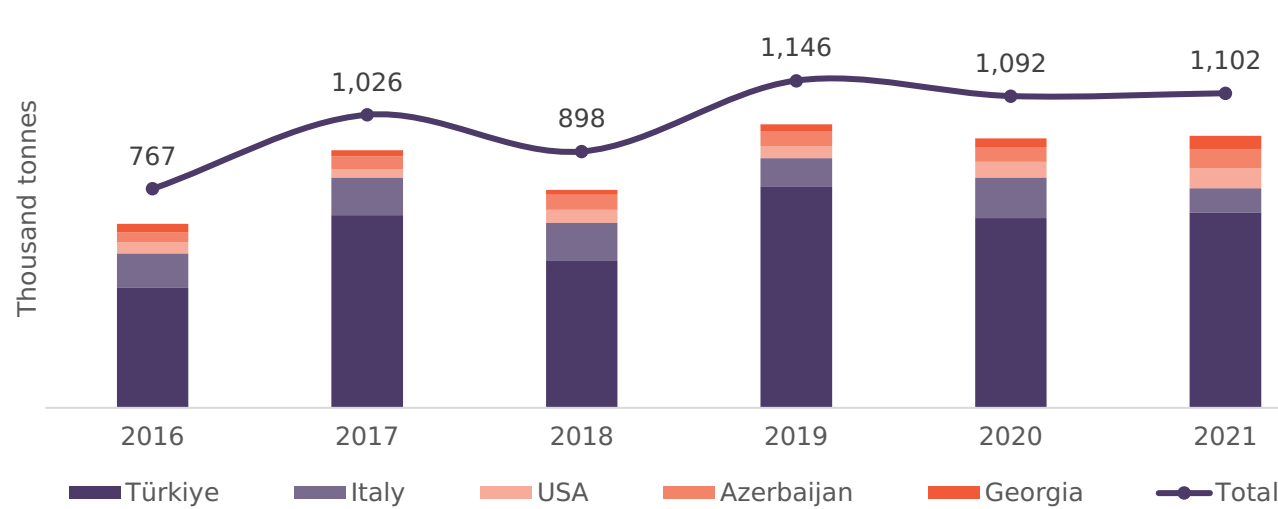
Issue 10

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- 👉 **Global trends:** In the hazelnut industry, between 2016 and 2022, notable increases were recorded in global production, harvested area, and exports. For example, hazelnut production (in tons) rose from 0.8 million in 2016 to 1.1 million in 2022. Despite its growth overall, the hazelnut industry faced some obstacles in 2022, attributed to low demand in the EU and unfavorable weather conditions (particularly heavy rainfall in the Black Sea region), resulting in setbacks in production, exports, and prices.
- 👉 **Key players:** Among the main global actors in the hazelnut industry, Turkey is the leading producer and exporter, followed by the USA, Italy, Georgia, and Azerbaijan. Notably, Turkey contributes 62.9% of the world's total shelled hazelnut exports, while the USA dominates the in-shell hazelnut market, accounting for 49.4% of global exports. From 2016 to 2022, on average, shelled hazelnuts accounted for 87.3% of the world's total exported hazelnuts, while in-shell hazelnuts made up the remaining 12.7%.
- 👉 **Georgian outlook:** Georgia is a significant contributor to the global hazelnut industry, ranking among the world's leading countries in both shelled and in-shell hazelnut exports. Notably, in 2022, Georgia held a 6.7% share in global hazelnut exports, securing fourth position among the world's top exporting countries. In addition, Georgia is also among the key players in terms of production and harvested area in the hazelnut industry.
- 👉 **Georgian regions:** Nearly all (97.9%) Georgian hazelnuts are produced in the following five regions: Samegrelo (42.2%); Guria (20.7%); Kakheti (12.9%); Adjara (12.0%); and Imereti (10.5%). Among these regions, the price of hazelnuts is highest in Kakheti, followed by Samegrelo and Imereti.
- 👉 **Georgian exports:** Most of the hazelnuts produced in Georgia are exported. Notably, 66.0% of total production was exported in 2022. The leading importer countries of Georgian hazelnuts are Italy and Germany. Furthermore, the price of Georgian hazelnuts in the export market is below the global average due to their relatively low quality.
- 👉 **Support to Georgian hazelnuts sector:** Hazelnut production in Georgia is supported strongly by the Georgian government, which offers subsidies to orchard owners. Meanwhile, international organizations, such as USAID and the EU, also contribute to enhancing the hazelnut value chain, and increasing the quality of Georgian production. In addition, significant investment has been attracted to Georgia's hazelnut sector, notably through the Italian company Ferrero's subsidiary operating in the country.

World Hazelnut Production

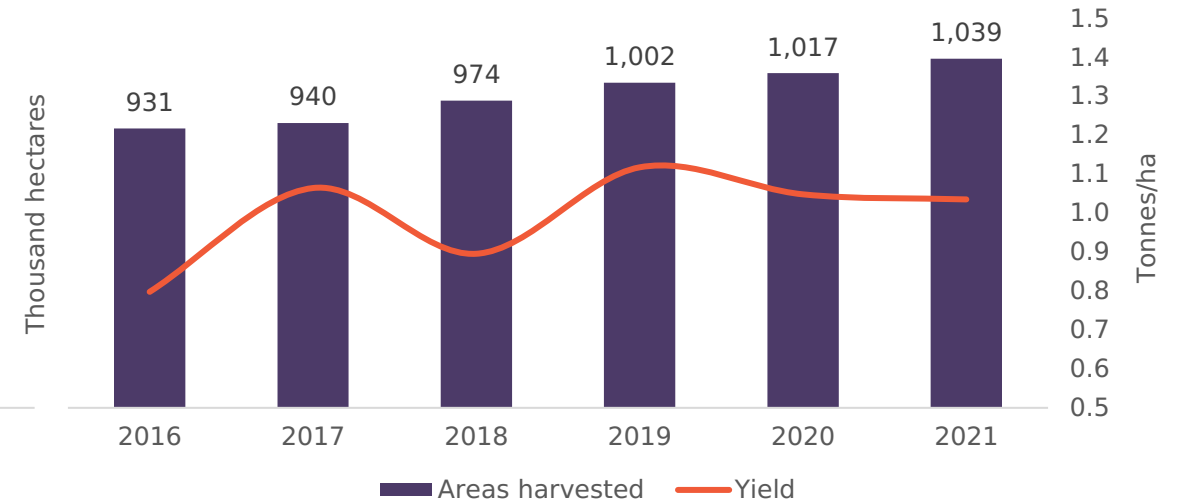


Source: Faostat

Hazelnut production worldwide has been increasing, with some fluctuations. Hazelnut production accounted for more than 1 million tonnes worldwide in 2021, representing a slight year-over-year (y/y) increase of 0.9%. Over the period of 2016-2021, the annual growth rate of global hazelnut production amounted to 9.3%, indicating a steady overall increase, despite fluctuations in 2018 and 2020.

The global area harvested for hazelnuts has been slowly but steadily increasing. In 2021, the total area harvested for hazelnuts worldwide exceeded 1 million hectares, marking a 2.2% increase y/y. While the growth in hazelnut areas harvested globally has not been rapid, it has remained consistent, with an average annual growth rate of 0.8% over the period 2016-2021.

World Hazelnut Area Harvested and Yield

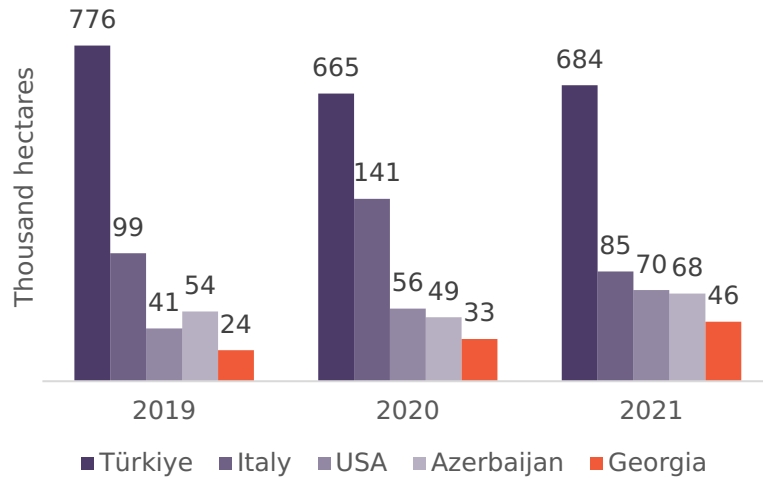


Source: Faostat

Worldwide yield of hazelnuts has been fluctuating, yet maintaining an overall upward trend. The global hazelnut yield amounted to 1.0 tonne per hectare in 2021, experiencing a 1.2% decrease y/y. Despite the inconsistent changes in hazelnut yield, the trend remained positive during 2016-2021, with an annual growth rate of 7.0%.

Upward trends in the hazelnut industry are following an increasing market demand. The hazelnuts market size is expected to increase from USD 474.21 million in 2023 to USD 700 million by 2028, at a CAGR of 8.1%. The demand for hazelnuts is driven by consumers' growing preference for their health benefits, culinary applications, and food industry trends.

Hazelnut Production - Top 5 Countries

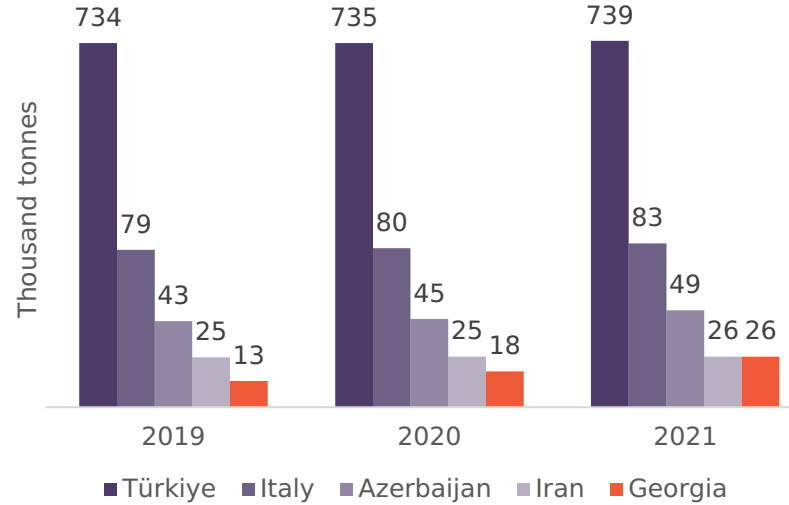


Source: Faostat

👉 **Türkiye dominates hazelnut production, with Georgia ranking among the top five producers.** In 2021, 63.5% of hazelnuts were produced in Türkiye, followed by Italy (7.9%), the USA (6.5%), Azerbaijan (6.3%), and Georgia (4.3%). Notably, Türkiye's share in production decreased by 5.7 percentage points (pp) from 2019 to 2021, as did Italy's (-0.9 pp). In contrast, the shares of other top producers increased: the USA (+2.9 pp), Georgia (+2.1 pp), and Azerbaijan (+1.5 pp).

👉 **The majority of hazelnut areas harvested are located in Türkiye, with Georgia ranking in fifth place.** In 2021, 71.1% of areas harvested for hazelnuts were in Türkiye (-2.2 pp, /2019), while areas harvested for hazelnuts increased significantly in Georgia, taking up 2.5% of areas worldwide (+1.1 pp, /2019). Other top countries maintained similar positions overall.

Hazelnut Area Harvested - Top 5 Countries

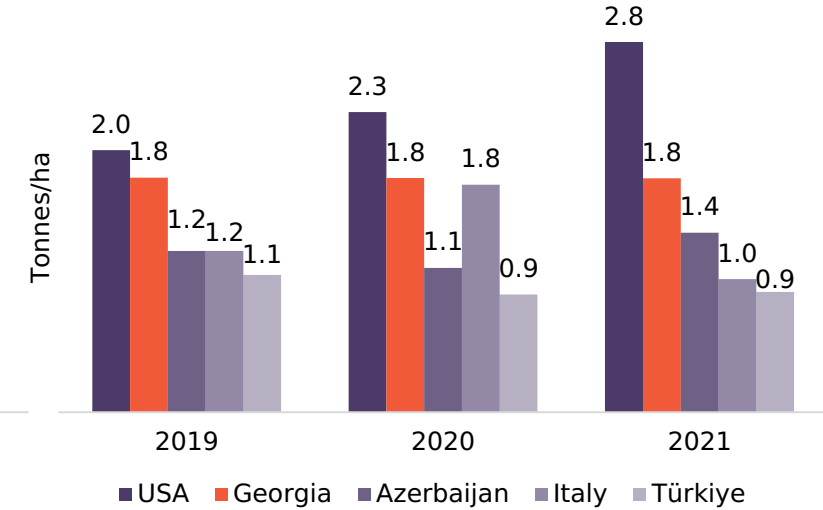


Source: Faostat

👉 **In terms of yields, the USA and Georgia are leading.** The USA recorded the highest yield among hazelnut-producing countries, followed by Georgia with a constant yield overtime. However, in Georgia, only 30-35% of harvested hazelnuts contain processable kernels, while in Türkiye, despite lower yield, processable kernel percentage is around 50%¹.

👉 **Modern technology has resulted in higher yields.** Despite not being among the top 5 countries in terms of harvested hazelnut area, the USA ranks third in production, attributed to the development of higher-yield hazelnut varieties¹. Additionally, in the USA, the utilization of modern technologies further enhances yield. Meanwhile, in Türkiye, hazelnut production is more labor-intensive², contributing to the lower yield.

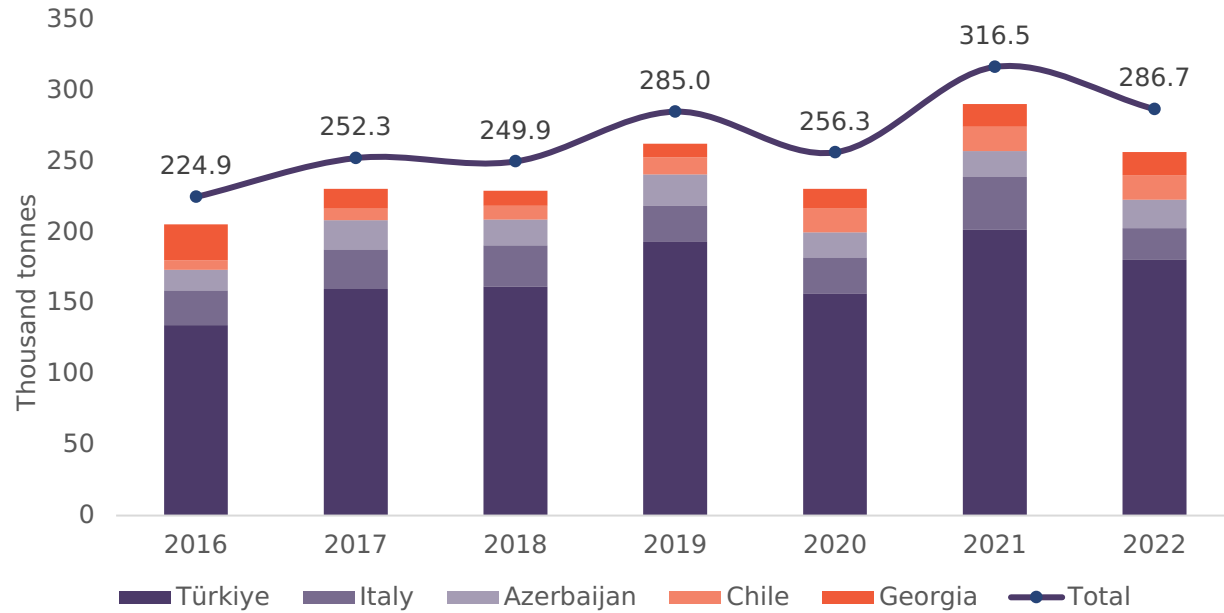
Hazelnut Yields - Top 5 Producer Countries



Source: Faostat

* The area harvested and yield figures for Georgia are estimates provided by the FAO and not officially reported statistics.

Shelled Hazelnut Exports

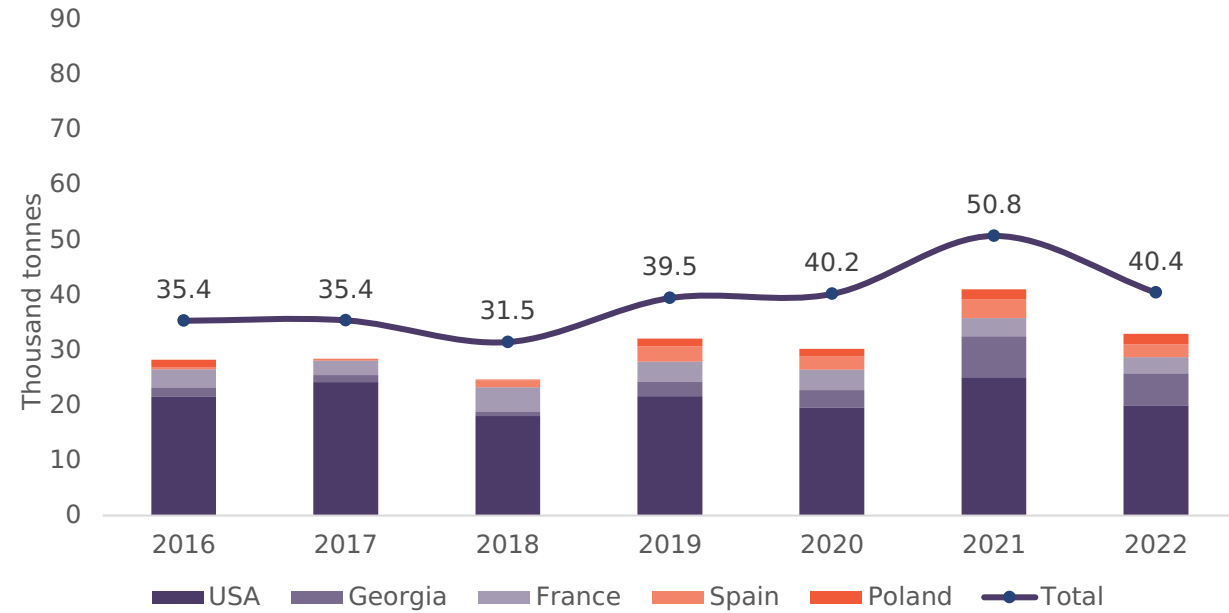


Source: Trademap

Hazelnut exports have been increasing, albeit with some setbacks. Global hazelnut exports witnessed an average annual growth of 4.7% from 2016 to 2022. Nevertheless, there were declines in 2020 (-8.6 pp, y/y) due to Covid-19³, and in 2022 (-10.9 pp, y/y) owing to low demand from European countries due to energy crisis spillovers and a recession in the chocolate industry across the continent⁴.

Georgia is one of the top exporters of both shelled and in shell hazelnuts. In 2022, Georgia was the 4th largest exporter of shelled hazelnuts, accounting for 5.7% of global exports, while it was the 2nd largest exporter of in shell hazelnuts, with 14.3% of global exports.

In Shell Hazelnut Exports

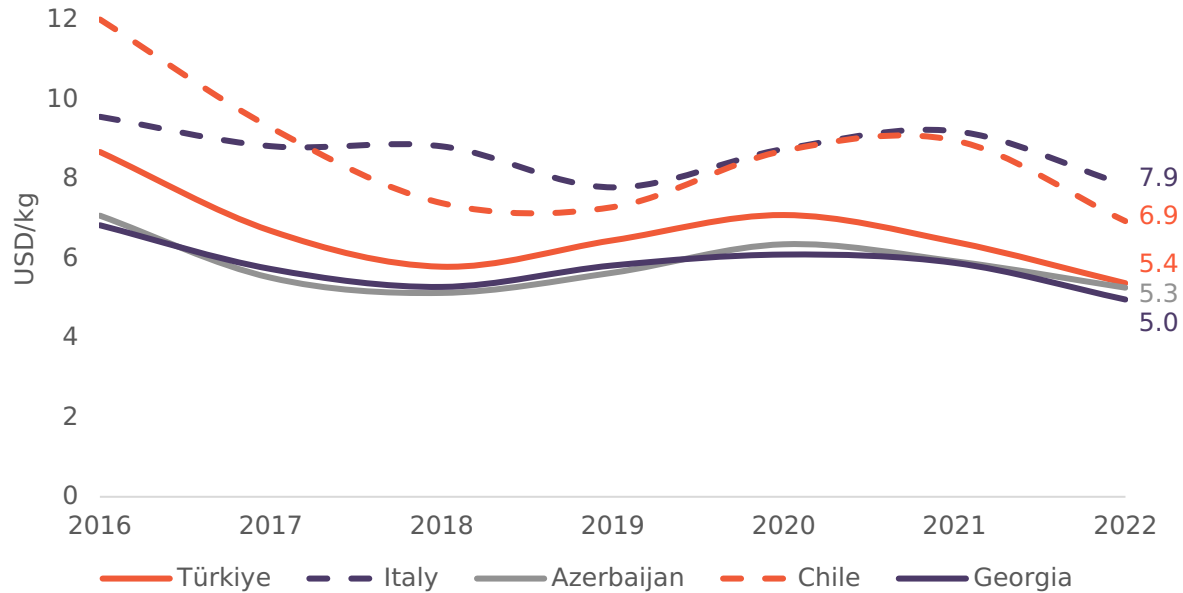


Source: Trademap

Vast majority of exported hazelnuts are shelled. From 2016 to 2022, on average, shelled hazelnuts accounted for 87.3% of the total exported hazelnuts, while in shell hazelnuts amounted to 12.7%. Notably, the share of these two remained consistent throughout the analyzed period in hazelnut exports.

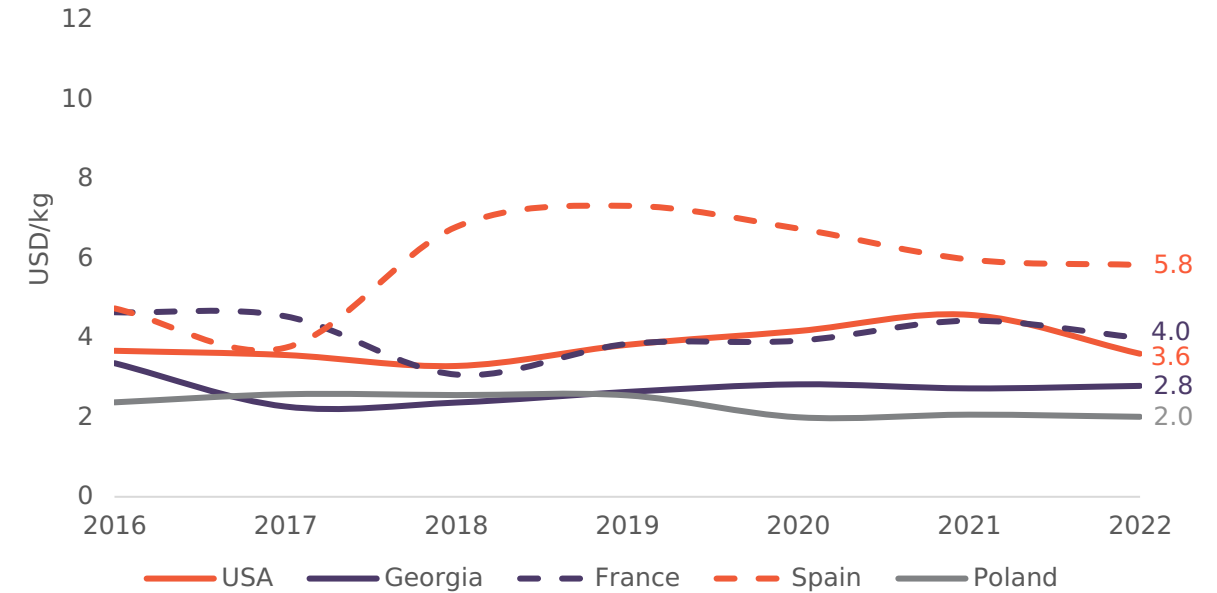
Türkiye is the lead exporter of shelled hazelnuts, while the USA the lead exporter of in shell hazelnuts. In 2022, the share of shelled hazelnuts exported from Türkiye amounted to 62.9% of total exports, while the share of the in shell hazelnut exports from the USA accounted for 49.4% of global exports. However, USA's hazelnuts face limited demand on the EU market due to differences in nutritional value.

Shelled Hazelnut Export Prices, Top Exporters



Source: Trademap

In Shell Hazelnut Export Prices, Top Exporters



Source: Trademap

📌 **Shelled hazelnuts are, on average, twice as expensive as in shell hazelnuts.** From 2016 to 2022, the average price of shelled hazelnut global exports was \$6.9/kg, while it was \$3.7/kg for in shell hazelnuts.

📌 **Export prices vary based on the quality and variety of hazelnuts.** Chile and Italy* report the highest export prices for shelled hazelnuts, while Spain leads in the export prices for in shell hazelnuts. The quality of harvested hazelnuts could

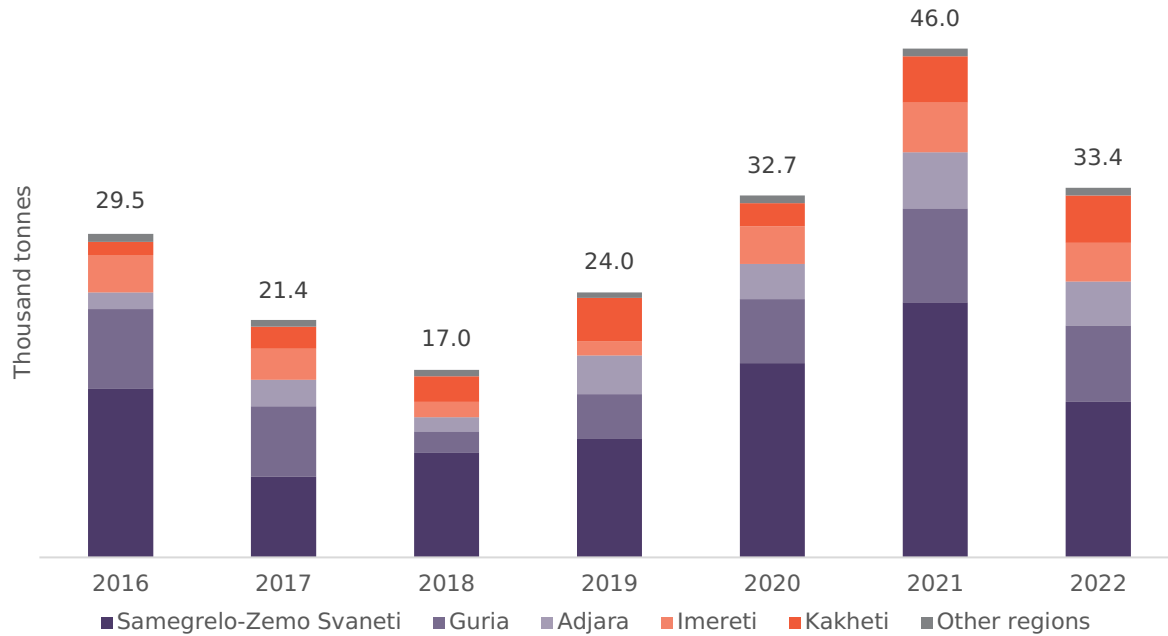
potentially explain the high variance in export prices among the top producer countries. Notably, Ferrero's production of premium-quality hazelnuts in Chile** is a significant contributor to high export prices. Meanwhile, hazelnuts produced in Georgia and Azerbaijan are generally of lower quality***, leading to their lower prices compared to other key players.

* In Italy, a key factor contributing to high export prices is the state subsidy program for hazelnuts.

** Reduced vulnerability to pests due to the non-endemic status of hazelnuts in Chile enhances quality of hazelnuts, further driving up the prices.

*** BMSB, poor agricultural and drying practices lower the quality of hazelnuts In Georgia and Azerbaijan.

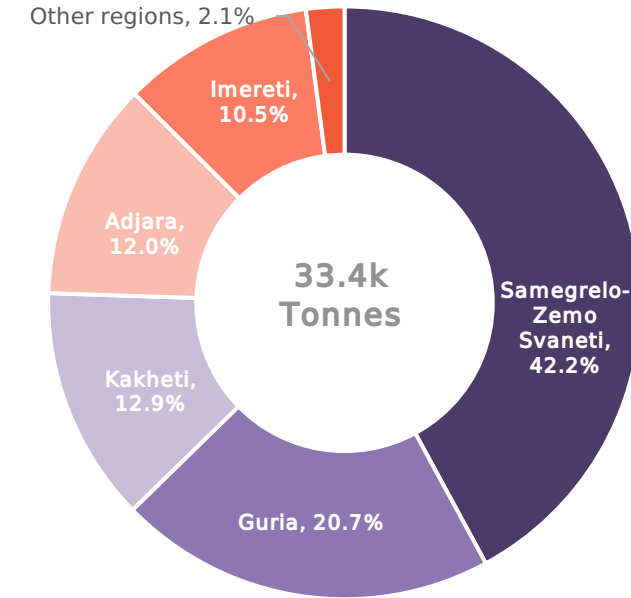
Hazelnut Production in Georgia



Source: Geostat

Hazelnut production in Georgia has been rising. From 2016 to 2022, hazelnut production in Georgia increased at an average annual rate of 7.1%. However, in 2017-2018, the Brown Marmorated Stink Bug (BMSB)⁵ invasion and tree fungus diseases⁶ hindered hazelnut production in Georgia. In 2022, the production faced setbacks yet again (-27.4%, y/y) due to unfavorable weather conditions⁷.

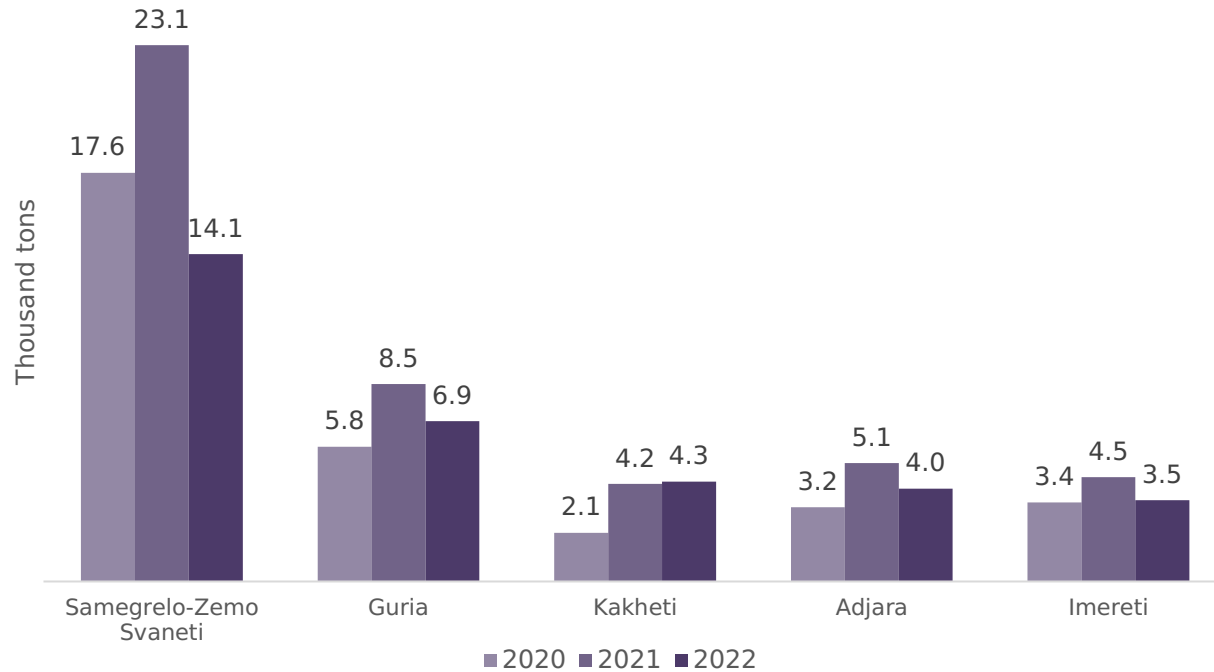
Hazelnut production by regions in 2022



Source: Geostat

Samegrelo remains the top hazelnut-producing region. In Georgia, Samegrelo stands out as the top hazelnut-producing region, backed by Ferrero Rocher's utilization and investments in the region⁸. Samegrelo is followed by Guria, Kakheti, Adjara, and Imereti. These five regions collectively account for 97.9% of Georgian hazelnut production.

Hazelnut Production, Main Regions

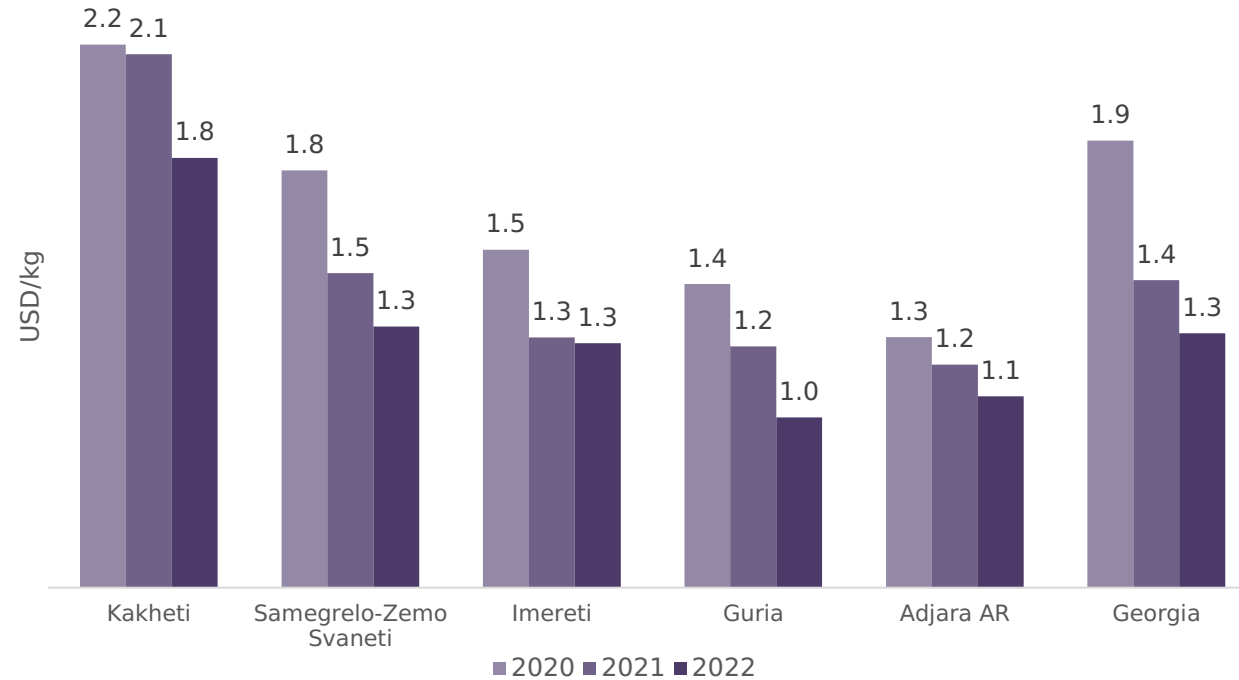


Source: Geostat

📌 **In 2022, hazelnut production setback is evident in every region, except Kakheti.** In 2022, Hazelnut production increased marginally in Kakheti, attributed to favourable weather conditions and higher share of industrial orchards. However, all other regions, including Samegrelo and Guria, experienced production setbacks.

📌 **Hazelnut prices vary across regions in Georgia.** During the period 2020-22, the most expensive hazelnuts in Georgia were produced in Kakheti, followed by Samegrelo-Zemo Svaneti and Imereti. Some price differences across regions can be attributed

Hazelnut Price, Farm Gate

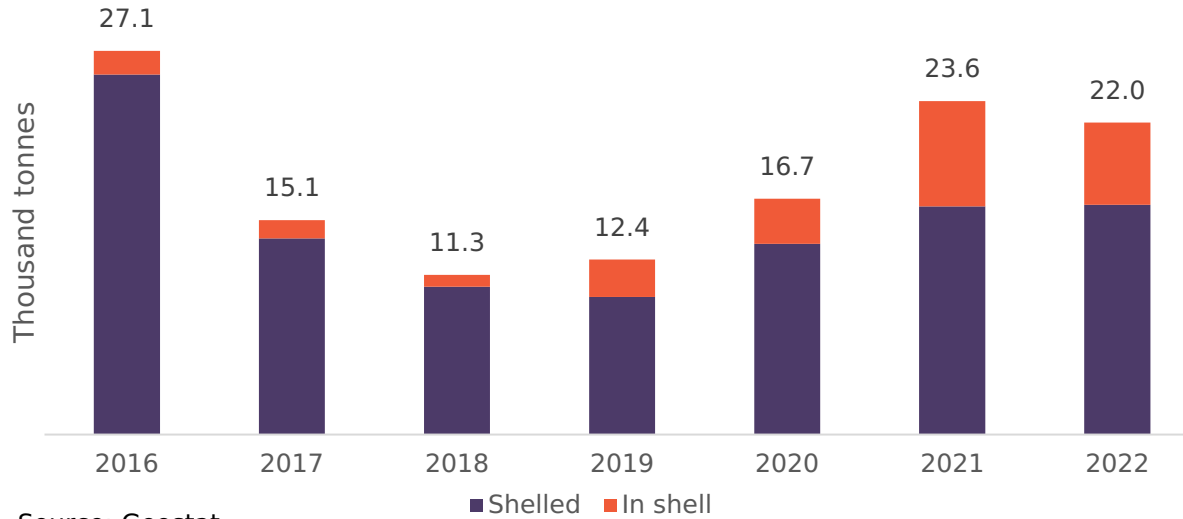


Source: Geostat

to the proportion of industrial orchards in the region. Kakheti, in particular, stands out due to the majority of its orchards being industrial, producing premium-quality hazelnuts that are sold at higher prices.

📌 **Hazelnut prices in Georgia have been decreasing.** In 2022, the price of hazelnuts followed a downward trend in every region, resulting in an 11.3% decrease y/y (measured in USD per kilogram). Decreasing prices negatively affect profitability of hazelnuts production in Georgia.

Georgian Hazelnut Exports, Volume

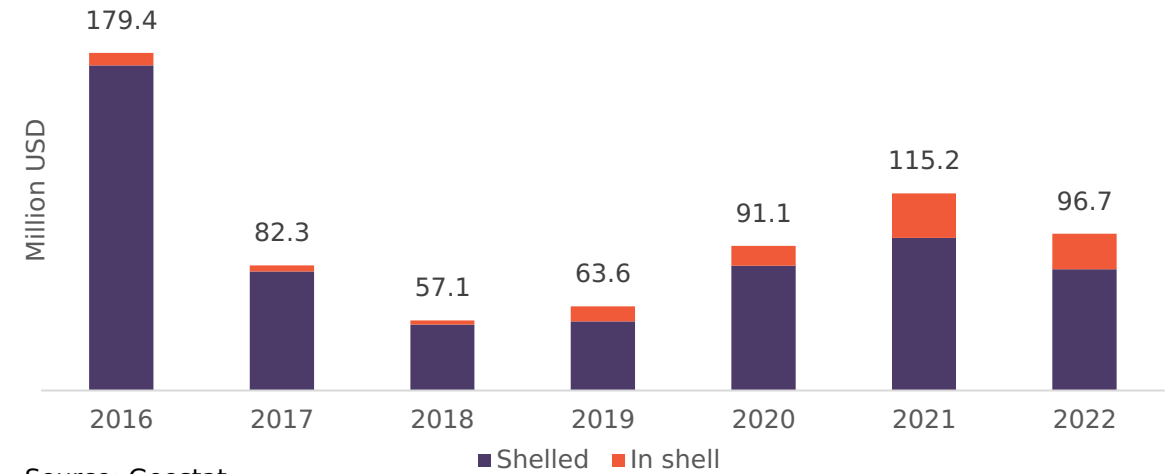


Source: Geostat

👉 **Georgia is one of the primary exporters of hazelnuts.** In 2022, Georgia exported 22 thousand tonnes of hazelnuts, experiencing a moderate y/y decrease of 6.5%. Notably, Georgian hazelnut exports displayed a declining trend during 2016-2018, followed by a steady growth trajectory leading up to 2022, resulting in an average annual growth rate of 1.6% during 2016-2022.

👉 **The majority of the hazelnuts exported from Georgia are shelled, with in shell export shares on the rise.** The proportion of shelled hazelnuts in the total Georgian hazelnut exports decreased to 73.7% in 2022 compared to 93.8% in 2016. In contrast, the share of in shell hazelnuts rose from 6.2% in 2016 to 26.3% in 2022, which can be attributed to the convenience of selling lower-quality in shell hazelnuts.

Georgian Hazelnut Exports, Value

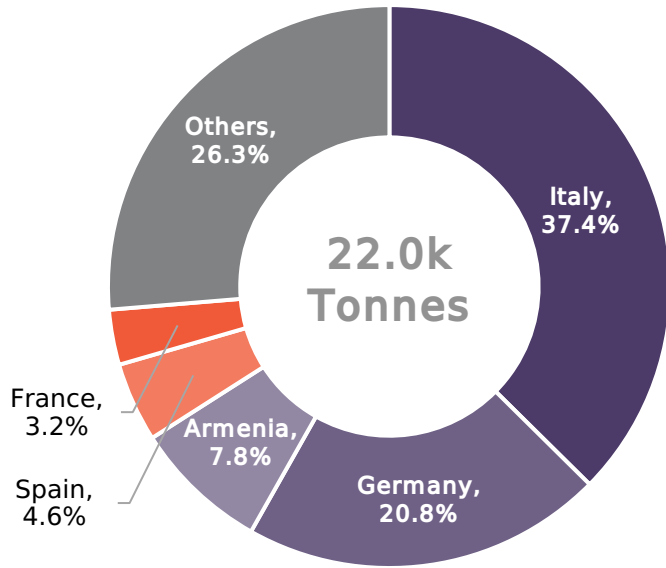


Source: Geostat

👉 **Georgia is struggling to match its 2016 peak in hazelnut export value.** In 2022, Georgia exported hazelnuts worth \$96.7 million, experiencing a substantial y/y decrease of 16.0 pp. Over the period of 2016 to 2022, the value of Georgian hazelnut exports reached its highest point in 2016, at \$179.4 million. This was followed by a decline till 2019 and a moderate increase from 2019 to 2021, although still far from the levels achieved in 2016.

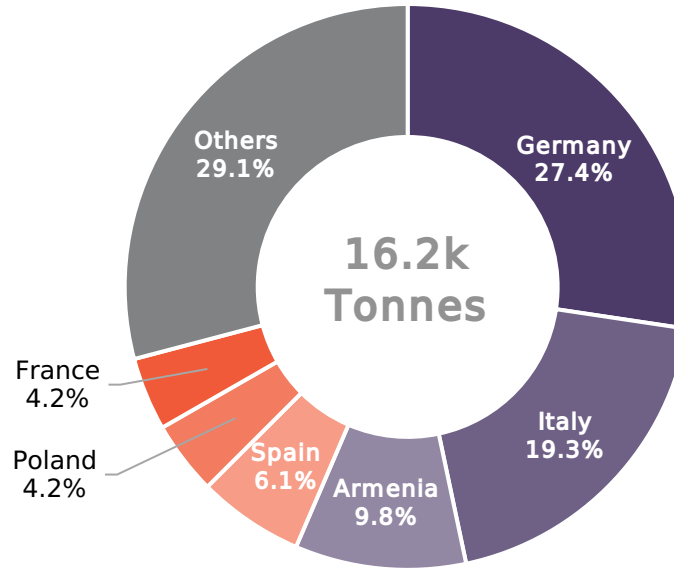
👉 **Shelled hazelnuts also dominate the Georgian hazelnut export value.** In 2022, the share of shelled hazelnuts in the total hazelnut export value stood at 83.3%, although this proportion had decreased from 96.8% in 2016, indicating a growing share of in shell hazelnuts in the Georgian hazelnut export value.

Georgian Exports by Countries, Total, 2022



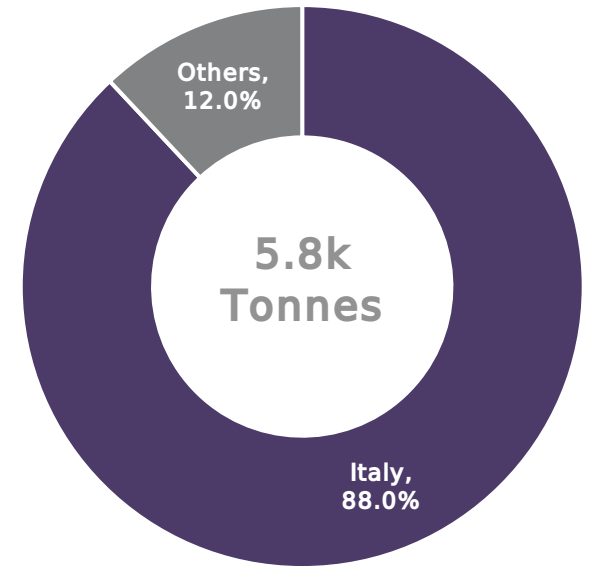
Source: Geostat

Georgian Exports by Countries, Shelled, 2022



Source: Geostat

Georgian Exports by Countries, In Shell, 2022

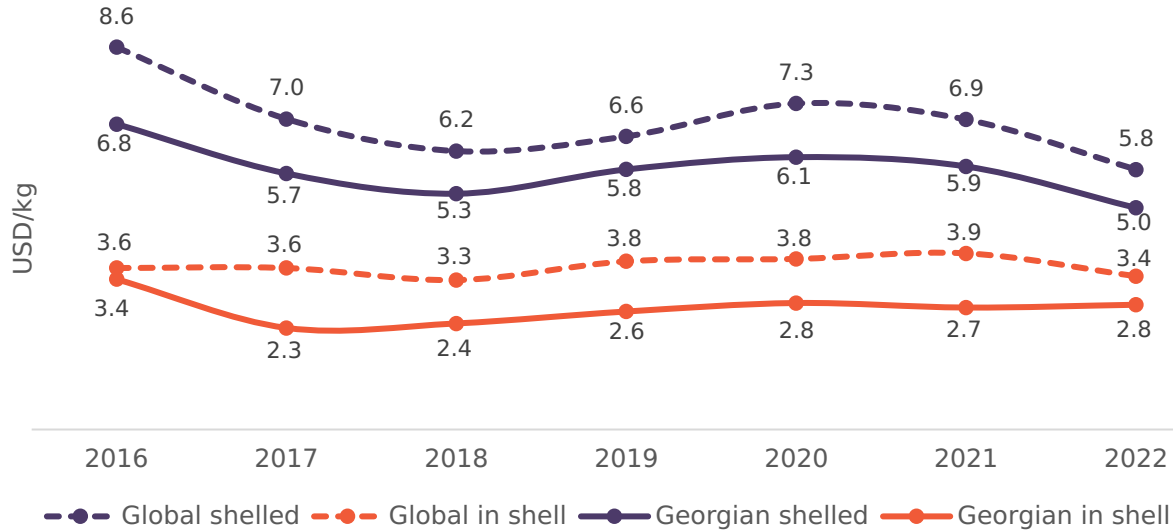


Source: Geostat

- 👉 **Georgian hazelnuts are mostly exported to European markets.** In 2022, 77.1% of Georgian hazelnuts were exported to EU countries, with 37.4% going to Italy, followed by Germany (20.8%) and Armenia (7.8%).
- 👉 **Germany is a top importer of Georgian shelled hazelnuts.** In 2022, 27.4% of the shelled hazelnuts exported from Georgia were sent to Germany, known for having one of the highest hazelnut consumption rates and for its various hazelnut treats. Italy followed closely at 19.3%, with Armenia (9.8%) and Spain (6.1%) also being key importers.

- 👉 **Georgian in shell hazelnuts are primarily exported to Italy.** The export volume of in shell hazelnuts is significantly lower than that of shelled hazelnuts, mainly due to higher transportation costs and the less reliable quality of in shell hazelnuts. In 2022, the majority of in shell hazelnuts were exported to Italy, with a significant share of 88.0%, attributed to Ferrero's activities on the Georgian market.
- 👉 **The hazelnut export market requires diversification.** Currently, Georgian hazelnut exports are primarily focused on Europe, occasionally resulting in setbacks due to low demand⁹. To overcome this challenge, Georgia should consider entering the growing Asian market, acknowledging the region's potential and rising demand for hazelnuts¹⁰.

Hazelnut Exports Price, Annual Averages

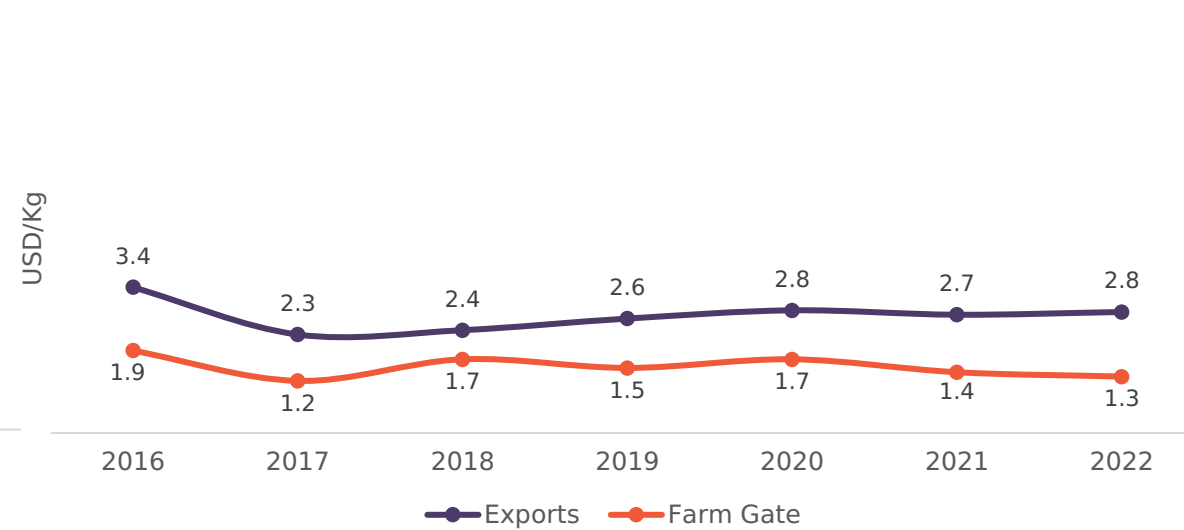


Source: Trademap, Geostat

🧠 **The price of shelled hazelnuts exported from Georgia mainly follows global trends, while in shell hazelnuts do not.** In 2016-2022, the price of Georgian exports of shelled hazelnuts showed a strong correlation of 0.98 with the price of global exports of shelled hazelnuts. In contrast, the correlation between the prices of global and Georgian exports of in shell hazelnuts was very low, at 0.21.

🧠 **Georgian hazelnut export prices have remained consistently below the global average.** In 2016-2017, the average price of hazelnuts decreased due to reputational damage caused by product irregularities of certain exporters from Georgia. The relatively lower price of Georgian hazelnuts is also attributed to the impact of pest infestations, leading to quality losses in the



Georgian in shell Hazelnut Price, Exports and Farm Gate



Source: Geostat

crop, sometimes exacerbated by unfavorable weather conditions¹¹. Additionally, secondary-quality hazelnuts, used in hazelnut paste production, are labeled as shelled hazelnuts while exporting. This practice also contributes to lower average prices.

🧠 **The price of in shell hazelnut exports is much higher than farm gate prices.** In 2016-2022, hazelnut export prices were, on average, 1.8 times higher than prices at farm gates in Georgia emphasizing the considerable value added to hazelnuts during the export process. This difference can also be attributed to the lower quality of hazelnuts purchased at farm gates, making them less suitable for exports.

-  **Significant foreign investments have been attracted to the hazelnuts sector in the country.** Since 2007, the Italian confectionary company Ferrero, known for its trademark products such as Nutella and Ferrero Rocher, has been operating on the Georgian market through its subsidiary, AgriGeorgia. Ferrero made a direct investment in a farm located in Samegrelo, which is among the nine farms globally owned by Ferrero¹². Notably, AgriGeorgia is one of the biggest exporters of Georgian hazelnuts¹³, not only from Samegrelo, but all hazelnut-producing regions of Georgia, particularly, Kakheti.
-  **The Government of Georgia supports hazelnut production.** Following the production setbacks in 2022, the Georgian government initiated a program for supporting hazelnut production¹⁴. Within the framework of the program, hazelnuts orchard Cadaster^{*1} was established, which was positively assessed by sectoral associations^{*2}. By September 2023, more than 90,000 farmers received subsidies, mostly in Samegrelo-Zemo Svaneti and Guria,^{*3} and the total amount of subsidies,^{*4} by the same period, exceeded 20 million GEL¹⁵. According to sectoral associations, even though, subsidies increased the quantity of harvested hazelnuts by more than 20%, some farmers did not spend provided subsidies for intended

purposes. Notably, the program is set to continue in 2024¹⁶. Additionally, hazelnut producers can also benefit from another government program, the Preferential Agrocredit Project¹⁷, which includes a specific subcomponent for financing hazelnut primary production.^{*5} However, only 28 farmers have applied to this program.^{*6}

-  **Hazelnuts production is supported by donor organizations.** Georgian Hazelnut Improvement Project¹⁸ (G-HIP) funded by USAID and Ferrero,^{*7} aimed to improve the hazelnut value chain, and increase the quality of Georgian hazelnuts. As part of this initiative, 35,000 beneficiaries increased their production, and eight new storage and drying enterprises were built^{19,*8} fully equipped with modern machinery. The program assisted farmers in obtaining Food Safety Certificates and addressing BMSB. The European Union also supported hazelnut production in Georgia through the “Ready to Trade” project²⁰ which was implemented by the International Trade Centre. The beneficiaries received help with business plans, quality management, certification, and modernizing machinery. The project's key focus was enhancing market connections with EU buyers.

*1 To be eligible for the program, hazelnut producers had to be registered in the hazelnut orchard cadaster. According to the Rural Development Agency (RDA), 64,856 farmers were registered in the cadaster, as of 28.04.2023

*2 Source: PMC's interviews with Georgian Hazelnuts Growers Association (GHGA) and Hazelnut Processors and Exporters Association of Georgia (HEPA)

*3 As of 28.04.2023, the highest share of beneficiaries were registered in Samegrelo-Zemo Svaneti - 49.8%, followed by Guria - 21.8%, Adjara - 10.5%, Imereti - 10.4%, Kakheti - 7.3%, and the remaining regions - 0.2%.

*4 Subsidies amounted to 500 GEL per hectare for hazelnut orchards with a total area of 0.2-3 hectares. As of 28.04.2023, the distribution of total subsidies across regions was as follows: Samegrelo-Zemo Svaneti - 56.4%, Guria - 20.3%, adjara - 8.5%, Kakheti - 8.4%, Imereti - 7.9% and the remaining regions - 0.2%. Within the program, a total of 43,953 hectares of hazelnuts orchards received subsidies.

*5 The loans provided under this project range from 5,000 to 100,000 GEL and can be used to cover necessary expenses, hire labor and agricultural machinery. The government offers co-financing for the interest, 8% per annum for up to 12 months.

*6 According to RDA, as of 30.09.2023, totally, 30 loans were granted to 28 beneficiaries.

*7 The project budget was \$7.3 million and was conducted from 2015-2023.

*8 During the season, it is possible to dry 7.5 thousand tons of hazelnuts and store up to 4 thousand tons of hazelnuts in these enterprises.

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> - A favorable climate and soil conditions for hazelnut production²⁰ - Georgia’s strong position among hazelnut exporters on the global market. - Growing demand for hazelnuts on the global market²⁰ - Variety of hazelnut-based products²⁰ - Donor and government support for hazelnuts production - Active sectoral associations - Existence of hazelnuts orchard cadaster - Existence of a large investor - Existing ties with European clients - Free trade agreements (FTA) with the EU, China, and the United Arab Emirates 	<ul style="list-style-type: none"> - Labor shortage²¹ - Land fragmentation²² - Inadequate number of drying facilities and poor conditions in existing ones²⁰ - Inadequate number of storage facilities and poor conditions in existing ones²⁰ - Lack of knowledge of modern processing technologies²² - Inadequate drainage systems in the main hazelnut-producing regions²³ - Farmers’ lack of information about the latest agricultural practices, market trends, and government policies²⁰ - Lack of access to finances to invest in hazelnut production²⁰ - Underdeveloped organic hazelnuts production²⁰ - Volatile quality of Georgian hazelnuts²⁴ - Global price volatility, mostly determined by Türkiye²⁰ - Time-consuming customs clearance procedures for export²⁰ - Technical challenges of procurement processes and distrust between stakeholders²⁰
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> - Encouraging farmers to produce higher-value organic hazelnuts - Diversifying production of hazelnut-based products - Diversifying Georgian hazelnut export markets by entering Asian and Middle Eastern markets - Increased trade with Saudi Arabia due to potential FTA - Improving hazelnuts production by intensifying activities to fight against BMSB - Enhancing the skills and knowledge of hazelnut growers by creating and promoting training programs - Development of scientific base for breeding higher-yield varieties 	<ul style="list-style-type: none"> - Damaged crops by fungal diseases and BMSB²⁰ - Decreased production and quality of hazelnuts due to unfavorable weather⁵ - Potential reputational damage for low-quality hazelnuts²⁰ - Negative effect of climate change on hazelnut production²⁵ - Trade barriers on export markets²² - Continuous migration of labor force

1. [PMC's interviews with Georgian Hazelnuts Growers Association \(GHGA\) and Hazelnut Processors and Exporters Association of Georgia \(HEPA\)](#)
2. [Turkish Journal of Agriculture and Forestry](#)
3. [The COVID-19 pandemic and trade in agricultural products](#)
4. [Türkiye's hazelnut exports hit by Europe's energy crisis spillover: business insider](#)
5. [RegInfo - The impact of BMSB on hazelnuts harvest quality](#)
6. [1tv - Decreased hazelnuts production due to fungal diseases](#)
7. [Business Press News - The price of hazelnuts in Georgia](#)
8. [Business Media - Ferrero: Georgia has a huge potential for hazelnut production](#)
9. [Türkiye's hazelnut exports hit by Europe's energy crisis spillover: business insider](#)
10. [Spotlight: China becomes important market for Turkish hazelnut export](#)
11. [Europe Time - The challenges faced by local production of hazelnuts](#)
12. [Ferrero's Hazelnut Supply-chain Diversification](#)
13. [Business Media - Top 10 hazelnuts exporting companies in 2021](#)
14. [Program for supporting hazelnut production](#)
15. [RDA - The farmers about the state subsidy](#)
16. [Business Media - Hazelnuts association about the state subsidy](#)
17. [Preferential Agrocredit Project](#)
18. [Georgia Hazelnut Improvement Project](#)
19. [Business Insider - Georgian Hazelnuts Improvement Project has been completed](#)
20. [Eastern Partnership: Ready to Trade - an EU4Business initiative](#)
21. [Hazelnut Processing Cluster Diagnostic Study in Samegrelo-Zemo Svaneti Region](#)
22. [Business Media - Labor shortage in hazelnuts production](#)
23. [Agricultural value chain in Imereti and Racha regions](#)
24. [Hazelnut Production Assessment and Training](#)
25. [Europe for Georgia - Volatile quality of Georgian hazelnuts](#)
26. [World Bank - Irrigation Sector Policy Paper](#)

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