

USDA Foreign Agricultural Service

# GAIN Report

Global Agricultural Information Network

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## Uzbekistan - Republic of

**Post:** Tashkent

## Uzbekistan Fresh Deciduous and Stone Fruits

**Report Categories:**

Fresh Deciduous Fruit

Stone Fruit

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**Report Highlights:**

The government of Uzbekistan (GOU) has been encouraging the transition of agricultural land from water-inefficient cotton to high value alternatives such as tree fruit, vine crops and vegetables. The majority of these products are consumed domestically, but GOU policies have led to the establishment of thousands of orchards, vineyards or farms that could contribute to an increase in exports to neighbors such as Russia and Kazakhstan, as well as to EU markets. Key to export success will be investments in post-harvest management and distribution technologies.

## General Information:

### I. Uzbekistan Fresh Deciduous and Stone fruits

#### PRODUCTION

Uzbekistan is one of the leading producers of fresh deciduous and stone fruits in Central Asia. According to Food and Agriculture Organization (FAO) statistics, Uzbekistan is among the top five producers of apricots in the world, the sixth largest producer of cherries, and 17<sup>th</sup> in apple production. In the past 10 years, Uzbekistan increased the total area of fruits orchards 1.2 times.



Uzbekistan's continental climate with hot summers is ideal for growing apple, pears, pomegranates, cherries, apricots, peaches and other popular fruit crops. The sector of deciduous, stone fruits and berries is one of the fastest developing and prospective areas in Uzbekistan's agriculture. Moreover, since 2005, the increased production of fruits and berries was considerably higher than that of planted areas, due to an increase in yields.

Fruits and berries production has increased 97.9 percent in the past decade. The considerable production growth is mainly attributed to increased domestic demand and growing exports.

#### **Photo1. Fruits Sales in a Local Farmers' Market.**

Over the last four years, the Government of Uzbekistan (GOU) has adopted several decrees and acts to further develop fruit production, renovate existing fruit orchards, and establish new ones. The GOU has recognized the importance of alternative crops (fruits and vegetables) to

the national economy. More than 25,000 hectares (ha) of new orchards were established in Uzbekistan over the past four years, and the GOU is planning to establish an additional 15,000 ha of high-density orchards in 2014. This reflects a gradual transition from inefficient cotton production to other high-value crops, which use water and other inputs more efficiently.

One of the major problems existing in this sector is postharvest losses resulting from improper harvesting (damage during harvesting), poor handling, poor hygiene in packaging (wooden pallets are not disinfected) and inadequate storage after harvesting. Usually small growers do not have packing centers that collect large amounts of fresh fruits, store, calibrate and package the produce for the local or export markets. Most are primary producers of fruits and mainly concentrate on production, giving limited attention to harvesting, which results in bruises and damage to products. Also, little attention is given to the temperature of the product during and after harvest, which is critical to the later stages of processing, packaging, storage, distribution and sale of fruits.

In 2013, the weather conditions were favorable for fruit growers, and based on preliminary official data,

CY2013 total fruit production is estimated at 2.26 million tons. CY2014 total fruit production is forecast to increase to 2.47 million tons.

**Table 1. Uzbekistan’s Total Fresh Deciduous and Stone Fruit Production by regions (CY2010-2013)**

Regions	2010		2011		2012		2013	
	Plant Area (hectares)	Production (tons)	Plant Area (hectares)	Production (tons)	Plant Area (hectares)	Production (tons)	Plant Area (hectares)	Production (tons)
Karakalpakstan	4700	24700	5200	27400	5200	30500	5250	33084
Andijan	28700	358900	29100	396900	29500	439500	29750	478133
Bukhara	11100	150900	11500	163500	11700	179500	11950	198768
Djizakh	12100	56300	13000	61600	12800	65700	12900	72814
Kashkadarya	14400	73400	15000	80600	15600	88700	15800	96521
Navoi	5700	61300	5900	69700	5800	77000	5950	86002
Namangan	24900	126300	25300	138100	26700	158000	27100	182026
Samarkand	29300	231700	30500	251300	30100	273100	31000	300737
Surkhandarya	14400	92300	14300	101500	15000	108800	16200	119085
Syrdarya	5100	19800	5200	21300	5600	24700	5900	26048
Tashkent	28700	140000	31400	162700	33600	162200	34000	172906
Ferghana	44200	256400	45700	276900	46800	308800	48000	348097
Khorezm	12100	118300	12400	127300	12400	136400	12600	146694
<b>Total</b>	<b>235400</b>	<b>1710300</b>	<b>244500</b>	<b>1878800</b>	<b>250900</b>	<b>2052800</b>	<b>256400</b>	<b>2260915</b>

\*The detailed production data by individual fruit crop is not available.

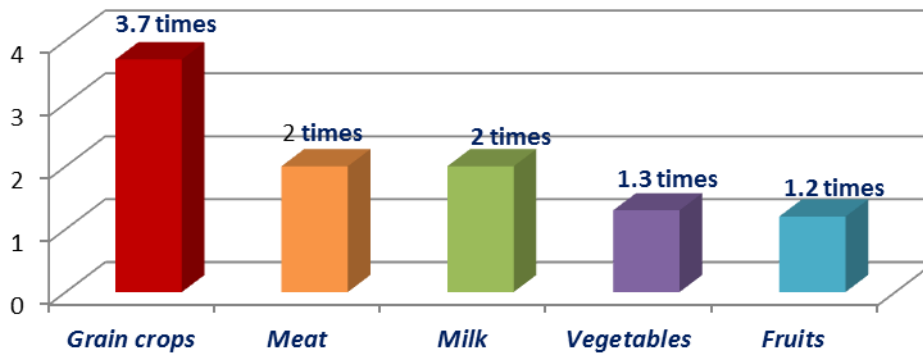
**Table 2. Uzbekistan’s Total Vine Crop (melon, water-melon, pumpkin) Production by regions (CY2010-2013)**

Regions	2010		2011		2012		2013	
	Plant Area (hectares)	Production (tons)	Plant Area (hectares)	Production (tons)	Plant Area (hectares)	Production (tons)	Plant Area (hectares)	Production (tons)
Karakalpakstan	5900	69500	6900	76300	7800	86300	7950	98752
Andijan	1200	64900	1200	71200	2100	79600	2200	86066
Bukhara	2200	79600	1900	87500	2000	94700	2150	104353
Djizakh	6900	155800	7400	174000	8500	188300	8700	210839
Kashkadarya	6400	86200	6200	100300	6500	112200	6700	121467
Navoi	1200	42200	1300	47200	1500	51000	1650	56085
Namangan	2000	48900	1700	53200	1900	56900	2100	63451
Samarkand	2800	69800	2100	75500	2400	82600	2600	89667
Surkhandarya	3100	113900	2900	123600	3100	137300	3300	150042
Syrdarya	5100	209400	1800	224700	4300	246100	4550	265489
Tashkent	3000	102000	3100	108800	4500	122000	4600	132582
Ferghana	2900	45700	3200	49700	2700	53200	2900	60153
Khorezm	5200	94500	6200	102800	6500	109200	6700	119102
<b>Total</b>	<b>47900</b>	<b>1182400</b>	<b>45900</b>	<b>1294800</b>	<b>53700</b>	<b>1418400</b>	<b>56050</b>	<b>1558048</b>

**Photo 2. One of the local melon and water melon bazars in Khorezm region**

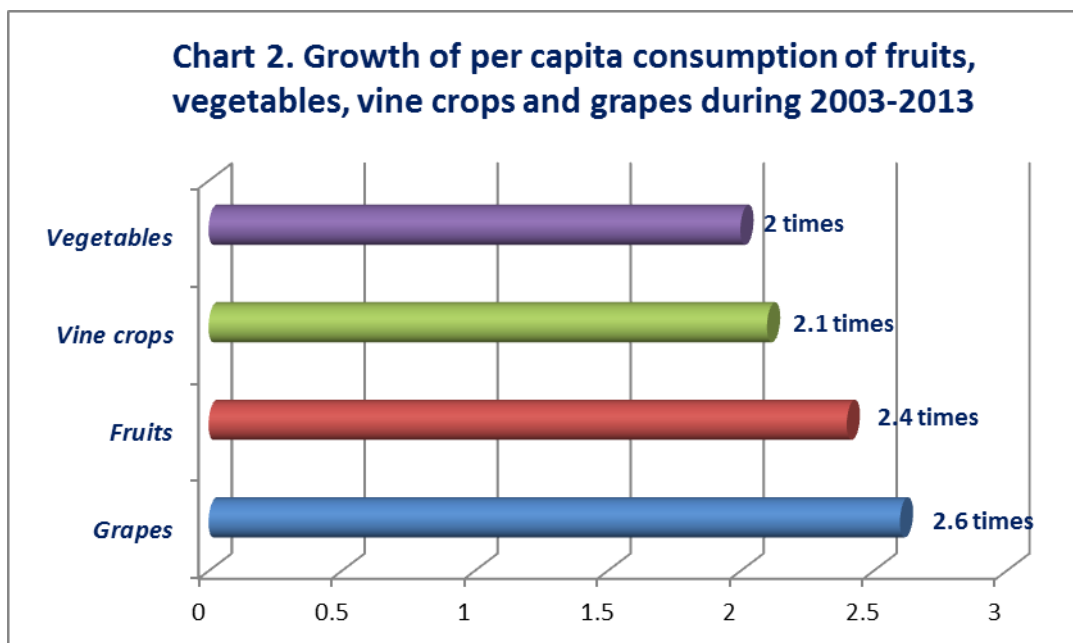


**Chart 1. Dynamic growth of fruits plant area compared to other ag crops and products in 2003-2013**



## CONSUMPTION

About 69 percent of Uzbekistan's deciduous and stone fruits crop is consumed fresh, while 11 percent is exported. About 20 percent, on average, is destined for processing (jams, juices, dried fruits).

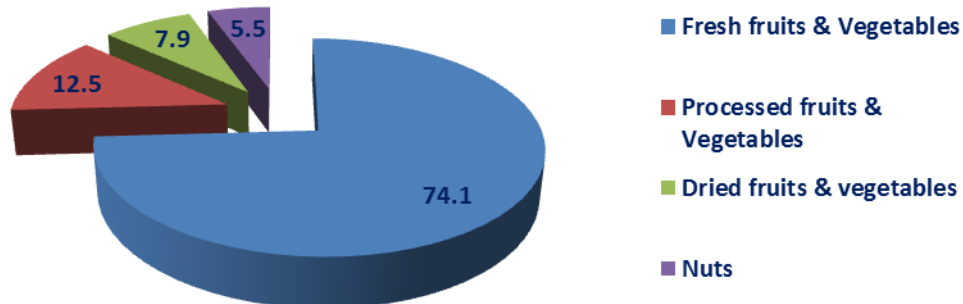


## **TRADE**

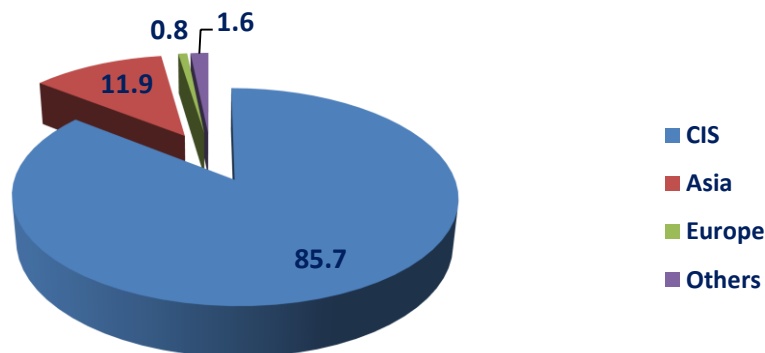
Annually, about 11 percent of Uzbekistan's deciduous and stone fruits are exported. Uzbekistan's CY2013 fruit exports are estimated at 250,000 tons. CY2014 fruit exports are forecast preliminarily at the same level as CY2013. Major fruit exports are cherries, apples, apricots and melons. Uzbekistan's main export markets are its neighboring Commonwealth of Independent States (CIS) republics (in particular Russia and Kazakhstan), as well as some European and Asian countries. Last September, during International Fair "Riga Food 2013" Uzbekistan trading companies reportedly signed export contracts worth of over US\$ 100 million for delivery of fruits and vegetables to markets in Latvia.

As for fruit imports into Uzbekistan, major imported fruit items include citrus products like oranges, tangerines, grapefruits, and lemons, as well as bananas and kiwi. Most citrus and other imported fruits originate from Iran, Turkey, Pakistan, Georgia and China. Official statistics on fruit imports volumes are not available. Post will prepare fruit import data in the next report.

**Chart 3. Export share in the major type of fruits and vegetables in 2012-2013 (in %)**



**Chart 4. Export destinations for fruits and vegetables in 2012-2013 (in %)**



## II. VEGETABLES (including potato)

### PRODUCTION

According to official sources, Uzbekistan's CY2013 total vegetable production is estimated at 10.76 million tons, which is 8.8 percent more than in CY2012. Vegetable production in CY2014 is forecast to increase to 11.28 million tons. The top three vegetable producing regions in the republic are Tashkent (2.05 million tons), Samarkand (1.83 million tons) and Andijon (1.43 million tons). These three regions produce almost half of Uzbekistan's total vegetable volume.

Since 2010, Uzbekistan increased its total vegetable planted area from 243,800 ha to 265,300 ha, and the yields have increased from 33 tons/ha to 41 tons/ha over the same period.

**Photo 3. Vegetables sales in one local farmers market**



**Table 3. Uzbekistan's Total Vegetables Production by regions (excluding potato) (CY2010-2013)**

Regions	2010		2011		2012		2013	
	Plant Area (hectares)	Production (tons)	Plant Area (hectares)	Production (tons)	Plant Area (hectares)	Production (tons)	Plant Area (hectares)	Production (tons)
Karakalpakstan	6800	134300	7200	145500	8500	166100	8700	201401
Andijan	14500	861700	14700	952400	17300	1072600	17600	1203428
Bukhara	8300	354800	7500	391200	7800	427500	8000	478081
Djizakh	8600	230800	9200	258200	8900	282200	9000	309001
Kashkadarya	14400	321500	14800	362800	15600	396200	15900	433750
Navoi	3300	149100	3400	171300	3500	180600	3600	200723
Namangan	13000	439400	13000	488700	13900	527400	14200	574564
Samarkand	25700	1049700	24600	1149200	24900	1250200	25200	1350785
Surkhandarya	13200	486400	14400	540200	13500	632900	13800	689835
Syrdarya	4300	182700	3500	195700	4000	216400	4300	247898
Tashkent	31700	1299100	31500	1418200	33700	1518300	34100	1716090
Ferghana	17000	459300	17800	520100	17800	569500	17900	638739
Khorezm	12200	377700	13800	400500	14300	437500	14500	471615
<b>Total</b>	<b>173000</b>	<b>6346500</b>	<b>175400</b>	<b>6994000</b>	<b>183800</b>	<b>7677400</b>	<b>186800</b>	<b>8515910</b>

**Table 4. Uzbekistan's Potato Production by regions (CY2010-2013)**

Regions	2010		2011		2012		2013	
	Plant Area (hectares)	Production (tons)	Plant Area (hectares)	Production (tons)	Plant Area (hectares)	Production (tons)	Plant Area (hectares)	Production (tons)
Karakalpakstan	6000	31100	4600	32900	5100	36400	5300	39435
Andijan	5600	169500	5600	179900	6100	201200	6400	231910
Bukhara	3600	115200	3900	128200	4200	141700	4400	157479
Djizakh	1900	38300	1600	43200	1600	46200	1700	50673
Kashkadarya	6200	97700	6400	112000	7000	126300	7300	140149
Navoi	1200	42700	1300	45800	1400	51200	1450	58238
Namangan	6100	152800	6500	167000	6700	188100	6900	207279
Samarkand	10900	371700	10700	409100	11600	449500	11800	480881
Surkhandarya	7400	127600	9200	145100	8900	159000	9000	174879
Syrdarya	1900	28800	1800	30900	1700	33600	1800	36506
Tashkent	7700	268800	8100	291400	8400	319700	8600	336715
Ferghana	7700	170100	8500	189000	8300	208000	8450	234358
Khorezm	4600	80500	5500	88000	5200	96300	5400	101864
<b>Total</b>	<b>70800</b>	<b>1694800</b>	<b>73700</b>	<b>1862600</b>	<b>76100</b>	<b>2057200</b>	<b>78500</b>	<b>2250366</b>

## CONSUMPTION

About 81 percent of Uzbekistan's vegetable crop is consumed fresh, 11.3 percent is processed by the domestic food industry, 4.3 percent is utilized for seeds, and the remaining 3.4 percent is exported.

Most fresh vegetables are grown by private farmers and small household farms and supplied to local markets. Also, there are large Agro-firms, which grow and supply vegetables under contract to fruit/vegetable processing companies.

## TRADE

Uzbekistan's CY2013 vegetable exports are estimated at 337,000 tons, and CY2014 exports are forecast at 300,000 tons. Major vegetable exports are tomatoes, cabbage and carrots. Uzbekistan's major export markets are the neighboring CIS countries (specifically Russia and Kazakhstan).

## Fruit and Vegetable Processing Industry Potential and Challenges

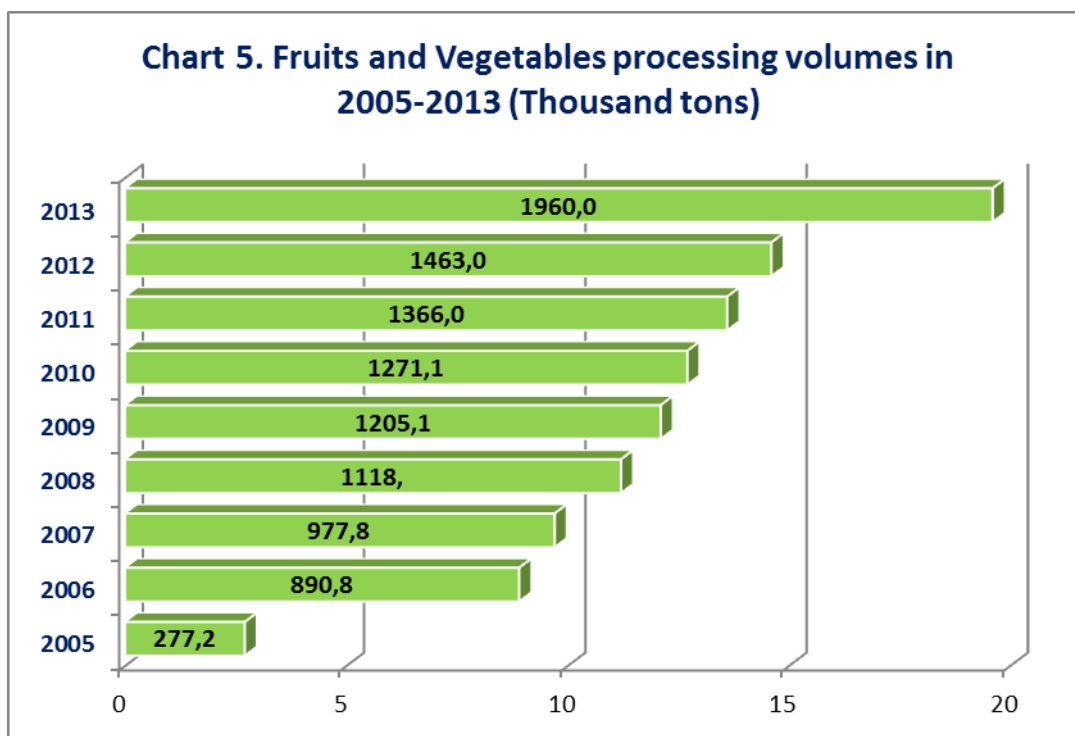
The Food Processing Industry is one of the fastest developing sectors of the economy. Given Uzbekistan's potential to develop into a major food exporter to Central Asia, Russia, and Eastern Europe, the demand for modern packaging and processing equipment could greatly expand if the agricultural sector is reformed and trade barriers are eliminated. In accordance with a GOU decree on expanding and developing the food sector, the GOU plans to build and renovate 104 plants specialized in processing fruit, vegetables and grapes by 2016. Most of these plants will be established in the Surkhandarya, Tashkent, Namangan and Andijon regions, and 78 of them will be newly constructed plants equipped with new equipment and technologies. The remaining 26 plants (of 104) are planned to be renovated in accordance with modern standards. This will allow an increase in annual total processing capacity of 63,100 tons. Experts believe that further development would require more investment into processing, packaging, and cold storage facilities. According to the GOU investment program, during 2013-2015 the local food processing industry plans to implement projects worth \$60 million, mainly aimed at establishing new production lines for vegetable and fruit juices, and canned products. By 2016, Uzbekistan targets the annual production of 610 million units of canned fruits and



vegetables (460 million units in 2011), 155,000 tons of dried fruit (123,000 tons in 2011), 220 million cans of fruit juice (155 million cans in 2011) and 35 million jars of tomato paste (30 million jars in 2011).

The sector is open to companies interested in juice, vegetables and fruits processing, as well as manufacturers of equipment to process, label, and package products. The GOU is trying to encourage private sector development in these areas, but real agricultural reform will be necessary if its efforts are to make a significant difference in the sector's development. There is a high demand for packaging materials, such as cardboard, paper, glass, aluminum foil, and shrink wrap, but these materials are not produced in the country. Small scale processing equipment is in demand and is more affordable for small businesses. Cold storage warehouse equipment is also in big demand.

Uzbekistan's food processing industry needs newer technology and equipment related to cooling, processing, packaging and storage to improve the quality and longevity of fruits and vegetables. Integrated chains of production need to be introduced to maintain the cold chain and utilize new technologies and best practices throughout production, transportation, processing and storage of sensitive categories of fruit and vegetables to improve quality, safety and efficacy.



## GRAPES

### PRODUCTION

Uzbekistan is the largest table grape producer in Central Asia and one of the leading fresh grape exporters in the region. Most table grapes are grown in the south, especially in Samarkand, the

Surkhandarya regions, the Ferghana Valley, as well as in the Tashkent region. The long warm weather period from early spring to late autumn allows farmers to grow more than 37 varieties of grapes. The most widespread grape varieties used in wine production are Soyaki (champagne, cognac), Saperavi (table and dessert wines), Rkatsiteli (dessert wines), May Black (dessert wines), Rosy Muscat (dessert wines), Hindogni (dessert and table wines), Bayan-Shirin (dry wines, champagne, cognac), and Aleatico (vintage and dessert wines). Popular grape varieties for fresh consumption are Khusayni, Rizamat, Kishmish and Damskiy palchik.

Over the past 4-5 years, the GOU has paid considerable attention to the development of grape production and expansion of vineyard areas. In March 2013, the GOU adopted a special decree on the development of viticulture in the republic during 2013-2015. Within the framework of this decree, they plan to optimize spacing and the regionalization of prospective grape varieties, as well as expand the planted area of vineyards. Also, the GOU decree targets assistance to farmers and other enterprises in the wine industry to market their products for export through specialized trading companies, as well as assist agro-firms to establish their own trade houses in CIS and other foreign countries. The GOU also plans to assist in pre-financing export contracts for grape producers and processors. In 2013-2014, the GOU program aims to establish 32 new nursery-plantations specialized in the production of seedlings of prospective high-yield grape varieties. In addition, the GOU decree calls for the establishment of 22,597 new grapes plantations during 2013-2015, of which 9,603 are for producing table grape varieties, 4,034 are for producing raisin varieties, and 8,960 are for producing technical varieties.

According to preliminary official estimates, total grape planted area equaled 133,000 ha in 2013, compared to 126,900 ha in 2012. In CY2014 and 2015 the total area of vineyards is officially forecast to increase to 140,000 ha and 150,000 ha respectively. CY2013 total grape production is estimated preliminarily at 1.32 million tons, which is 9.7 percent higher than in CY2012. CY2014 grape production is forecast to increase to 1.36 million tons.

**Photo 4. Featuring local Rizamat grape variety in one of the local vineyards**



**Table 5. Uzbekistan's Total Grapes Production by regions (CY2010-2013)**

Regions	2010		2011		2012		2013	
	Plant Area (hectares)	Production (tons)	Plant Area (hectares)	Production (tons)	Plant Area (hectares)	Production (tons)	Plant Area (hectares)	Production (tons)
Karakalpakstan	500	3500	500	3800	600	4200	750	4452
Andijan	4200	38100	4000	47100	4000	52400	4500	57262
Bukhara	9600	100000	9800	109400	9700	125300	10600	140036
Djizakh	4900	22700	5100	24300	4000	26600	4300	27530
Kashkadarya	9500	49800	10500	63500	10800	68700	11800	76022
Navoi	6500	46300	6500	52700	6500	56300	6900	59376
Namangan	12400	74000	11000	75000	11100	87500	11700	98606
Samarkand	39000	360000	38200	380900	38300	421300	39000	468125
Surkhandarya	14200	77100	13800	95100	14300	103200	14700	113029
Syrdarya	1500	8400	1500	9000	1600	10000	1700	10815
Tashkent	18100	115500	18100	127700	18000	137000	18300	140905
Ferghana	5100	65900	5600	71200	5400	83100	5900	92735
Khorezm	2400	26000	2500	28100	2600	30400	2850	33172
<b>Total</b>	<b>127900</b>	<b>987300</b>	<b>127100</b>	<b>1090200</b>	<b>126900</b>	<b>1206000</b>	<b>133000</b>	<b>1322065</b>

## CONSUMPTION

About 73 percent of Uzbekistan's grape crop is consumed fresh, 23 percent is processed domestically, and the remaining 4 percent is exported. One of the biggest grape processing companies in the country is Uzvinsanoat Holding Company, whose main activity is alcohol and wine production, as well as juices. By the end of 2013, Uzvinsanoat Holding Company had 120 grape processing enterprises all over the country, of which 83 were wineries. According to the company's forecasts, the number of its wineries will increase to 90 and production volumes will be raised to 215,000 tons by the end of 2014. Nowadays, Uzbekistan wine production and its quality are developing very rapidly. Some wines are exported to neighboring countries and some to Europe.

Uzbekistan also produces about 55,000-60,000 tons of raisins annually. Roughly half of this production is exported.

## TRADE

According to the State Statistics Committee, Uzbekistan exported 44,000 tons of fresh table grapes in CY2013. CY2014 exports of fresh grape are forecast at 60,000 tons. Major export destinations are neighboring CIS countries, specifically Kazakhstan and Russia. Also, Uzbekistan exports about 35,000-40,000 tons of raisins annually, mainly to neighboring countries and some to Europe, and even some small volumes to the United States. Kazakhstan is one of the largest importers of Uzbek raisins. In CY2013, Kazakhstan imported almost half of its raisin from Uzbekistan.