Economy versus the environment – competitiveness or complementarity
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# ROMANIA BETWEEN CONVENTIONAL AND ORGANIC FARMING – OPPORTUNITIES AND OBSTACLES

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# Question

## Are the products of today still tasty?

*Products that seem designed on the computer, large-sized, with perfect shapes, charming colours, as if coming from an unreal world; big, good-looking fruits, all have the same size; vegetables, full of colour and appetizing, with the same picture aspect, as if cut from a magazine. This is the common image of the agri-food products in the supermarket, which are being sold today in the world. But beyond these exterior aspects, pleasant to the eye, there is something else, which is disappearing, that some of us have completely forgotten. It is the essence, the contents, the texture, it is that "something" enchanting not only the eye but also the other senses.*

***This is the taste !***

(First contact)

# Question

## **Are the products of today still healthy?**

*The answer is given by specialist, institutions, organizations, special studies and analysis*

(Second contact)


# Question

**Conventional or organic farming ?**

**Is Romania competitive ?**

**Opportunities / Obstacles ?**

# Overview

- **Organic farming in the World**
- **Organic farming in Romania**
  - ***-Legislation***
  - ***-Institutions***
  - ***-Policy***
  - ***-Evolution***
  - ***-Potential, Trends, Opportunities, Obstacles***
- **Conclusions**

# Organic farming

**Four** specific **EU quality schemes** have been introduced to develop geographical indications, traditional specialities, product from certain region of the EU and **organic farming**. The current EU quality schemes represent the cornerstone of EU quality policy.

There are a number of candidates for further EU schemes, including product of high-nature value or mountain areas, welfare quality, an EU origin label and extension of the *Ecolabel* scheme to processed agricultural products.

Any new EU-level quality scheme must correspond to policy needs at EU level that cannot be adequately met by a national or private-sector scheme or other instrument.

In the framework of the *Health Check* of the common agriculture policy, the challenges of climate change impacts, conservation of biodiversity, and water use were highlighted as among the highest priorities.

# Organic farming

# Organic agricultural land and regional shares of global organic agricultural land (2013)

| Region | Organic agricultural land [hectares] | Regions' share of the global organic agricultural land |
|---|---|---|
| Africa | 1'227'008 | 2.8% |
| Asia | 3'425'939 | 8.0% |
| Europe | 11'460'773 | 26.6% |
| Latin America | 6'611'636 | 15.3% |
| North America | 3'047'710 | 7.1% |
| Oceania | 17'321'733 | 40.2% |
| **Total** | **43'091'113** | **100.0%** |

Source: FIBL & IFOAM (2015): The World of Organic Agriculture 2015. Frick and Bonn, pp.35

# Organic agricultural land by country (2013)

| Country | Hectares |
|---|---|
| Australia | 17'150'000 |
| Argentina | 3'191'255 |
| United States of America | 2'178'471 |
| China | 2'094'000 |
| Spain | 1'610'129 |
| Italy | 1'317'177 |
| France | 1'060'756 |
| Germany | 1'060'669 |
| Uruguay | 930'965 |
| Canada | 869'239 |
| Brazil | 705'233 |
| Poland | 661'956 |
| United Kingdom | 567'751 |
| Austria | 526'689 |
| India | 510'000 |
| Mexico | 501'364 |
| Sweden | 500'996 |
| Czech Republic | 474'231 |
| Turkey | 461'396 |
| Falkland Islands (Malvinas) | 403'212 |
| Ukraine | 393'400 |
| Peru | 388'448 |
| Greece | 383'606 |
| Kazakhstan | 291'203 |
| Romania | 288'261 |
| Portugal | 271'532 |
| Uganda | 231'157 |
| Finland | 206'170 |
| Latvia | 200'433 |
| Tanzania | 186'537 |
| Dominican Republic | 180'609 |
| Denmark | 169'298 |
| Slovakia | 166'700 |
| Lithuania | 166'330 |
| Ethiopia | 164'777 |
| Estonia | 151'256 |
| Russian Federation | 144'254 |
| Sudan | 141'479 |
| Hungary | 140'292 |
| Tunisia | 139'087 |
| Switzerland | 128'140 |
| New Zealand | 106'753 |
| Philippines | 101'278 |
| Egypt | 85'801 |
| Indonesia | 65'688 |
| Belgium | 62'529 |
| Paraguay | 62'274 |
| Bulgaria | 56'287 |

| Country | Hectares |
|---|---|
| Ireland | 52'793 |
| Democratic Republic of the Congo | 51'838 |
| Norway | 51'662 |
| Netherlands | 49'394 |
| Ecuador | 42'781 |
| Croatia | 40'641 |
| Slovenia | 38'665 |
| Viet Nam | 37'490 |
| South Africa | 37'466 |
| Saudi Arabia | 36'595 |
| Thailand | 33'840 |
| Nicaragua | 33'621 |
| Samoa | 33'515 |
| Bolivia | 32'710 |
| Colombia | 31'621 |
| Madagascar | 30'265 |
| Ghana | 28'201 |
| Honduras | 24'950 |
| Timor-Leste | 24'690 |
| Chile | 23'469 |
| Azerbaijan | 23'331 |
| Namibia | 23'086 |
| Pakistan | 22'397 |
| Moldova | 22'102 |
| Republic of Korea | 21'210 |
| Papua New Guinea | 20'939 |
| Syrian Arab Republic | 19'987 |
| Sri Lanka | 19'517 |
| Côte d'Ivoire | 19'263 |
| Burkina Faso | 16'689 |
| Panama | 15'183 |
| Mozambique | 13'998 |
| Guatemala | 13'380 |
| Mongolia | 12'922 |
| Tajikistan | 12'659 |
| Iran (Islamic Republic of) | 12'156 |
| Japan | 10'611 |
| Cambodia | 9'889 |
| Iceland | 9'710 |
| Nepal | 9'361 |
| Morocco | 8'660 |
| Serbia | 8'228 |
| Zambia | 7'552 |
| Israel | 7'471 |
| Costa Rica | 7'449 |
| Cuba | 7'389 |
| Senegal | 7'176 |

| Country | Hectares |
|---|---|
| Bangladesh | 6'860 |
| El Salvador | 6'736 |
| Bhutan | 6'726 |
| Lao PDR | 6'442 |
| Palestinian, States of | 6'354 |
| Taiwan | 5'937 |
| Kenya | 4'894 |
| Togo | 4'638 |
| Luxembourg | 4'448 |
| United Arab Emirates | 4'150 |
| Vanuatu | 4'106 |
| Sao Tome and Principe | 4'051 |
| Cyprus | 3'923 |
| Mali | 3'727 |
| Rwanda | 3'705 |
| Macedonia (FYROM) | 3'146 |
| Montenegro | 3'068 |
| Jordan | 2'898 |
| Haiti | 2'878 |
| Kyrgyzstan | 2'856 |
| French Guiana (France) | 2'702 |
| Comoros | 2'642 |
| Lebanon | 2'571 |
| Angola | 2'486 |
| French Polynesia | 2'469 |
| Fiji | 2'164 |
| Georgia | 1'999 |
| Benin | 1'987 |
| Belize | 1'982 |
| Guinea-Bissau | 1'843 |
| Solomon Islands | 1'307 |
| Liechtenstein | 1'137 |
| Armenia | 1'000 |
| Myanmar | 897 |
| Algeria | 700 |
| Cameroon | 663 |
| Albania | 662 |
| Malaysia | 603 |
| Réunion (France) | 595 |
| Lesotho | 560 |
| Burundi | 550 |

| Country | Hectares |
|---|---|
| Jamaica | 542 |
| Tonga | 398 |
| Zimbabwe | 374 |
| Bosnia and Herzegovina | 292 |
| Martinique (France) | 269 |
| Malawi | 265 |
| Channel Islands | 260 |
| Faroe Islands | 253 |
| Nigeria | 250 |
| Dominica | 240 |
| Uzbekistan | 213 |
| Guadeloupe (France) | 193 |
| Kosovo | 114 |
| Niger | 106 |
| Grenada | 85 |
| Niue | 61 |
| Afghanistan | 61 |
| Bahamas | 49 |
| Venezuela | 47 |
| Iraq | 40 |
| Oman | 38 |
| Malta | 37 |
| Cook Islands | 20 |
| Mauritius | 16 |
| Mayotte | 5 |
| Swaziland | 3 |
| Andorra | 1 |
| Belarus (Wild collection only) | |
| Bermuda (Processing) | |
| Chad (Wild collection only) | |
| Guyana (Wild collection only) | |
| New Caledonia (PGS group)* | |
| San Marino (Processing) | |
| Singapore(Processing) | |
| **Total** | **43'091'113** |

Source: FIBL & IFOAM (2015): The World of Organic Agriculture 2015. Frick and Bonn, pp.37-38

# Shares of organic agricultural land by country (2013)

| Country | Share |
|---|---|
| Falkland Islands (Malvinas) | 36.3% |
| Liechtenstein | 31.0% |
| Austria | 19.5% |
| Sweden | 16.3% |
| Estonia | 16.0% |
| Switzerland | 12.2% |
| French Guiana (France) | 11.9% |
| Samoa | 11.8% |
| Czech Republic | 11.2% |
| Latvia | 11.0% |
| Italy | 10.3% |
| Dominican Republic | 9.3% |
| Finland | 9.0% |
| Slovakia | 8.8% |
| Faroe Islands | 8.4% |
| Slovenia | 8.4% |
| Portugal | 8.1% |
| Sao Tome and Principe | 7.2% |
| Timor-Leste | 6.6% |
| Spain | 6.5% |
| Denmark | 6.4% |
| Germany | 6.4% |
| Uruguay | 6.3% |
| Lithuania | 5.7% |
| French Polynesia | 5.5% |
| Norway | 4.8% |
| Mongolia | 4.7% |
| Greece | 4.6% |
| Belgium | 4.6% |
| Poland | 4.3% |
| Australia | 4.2% |
| France | 3.9% |
| Luxembourg | 3.4% |
| Hungary | 3.3% |
| United Kingdom | 3.3% |
| Croatia | 3.1% |
| Channel Islands | 3.0% |
| Cyprus | 2.7% |
| Netherlands | 2.6% |
| Mexico | 2.3% |
| Egypt | 2.3% |
| Argentina | 2.3% |
| Vanuatu | 2.2% |
| Romania | 2.1% |
| Turkey | 1.9% |
| Bulgaria | 1.8% |
| Papua New Guinea | 1.8% |
| Peru | 1.8% |
| Palestinian, State of | 1.7% |
| Comoros | 1.7% |
| Uganda | 1.7% |

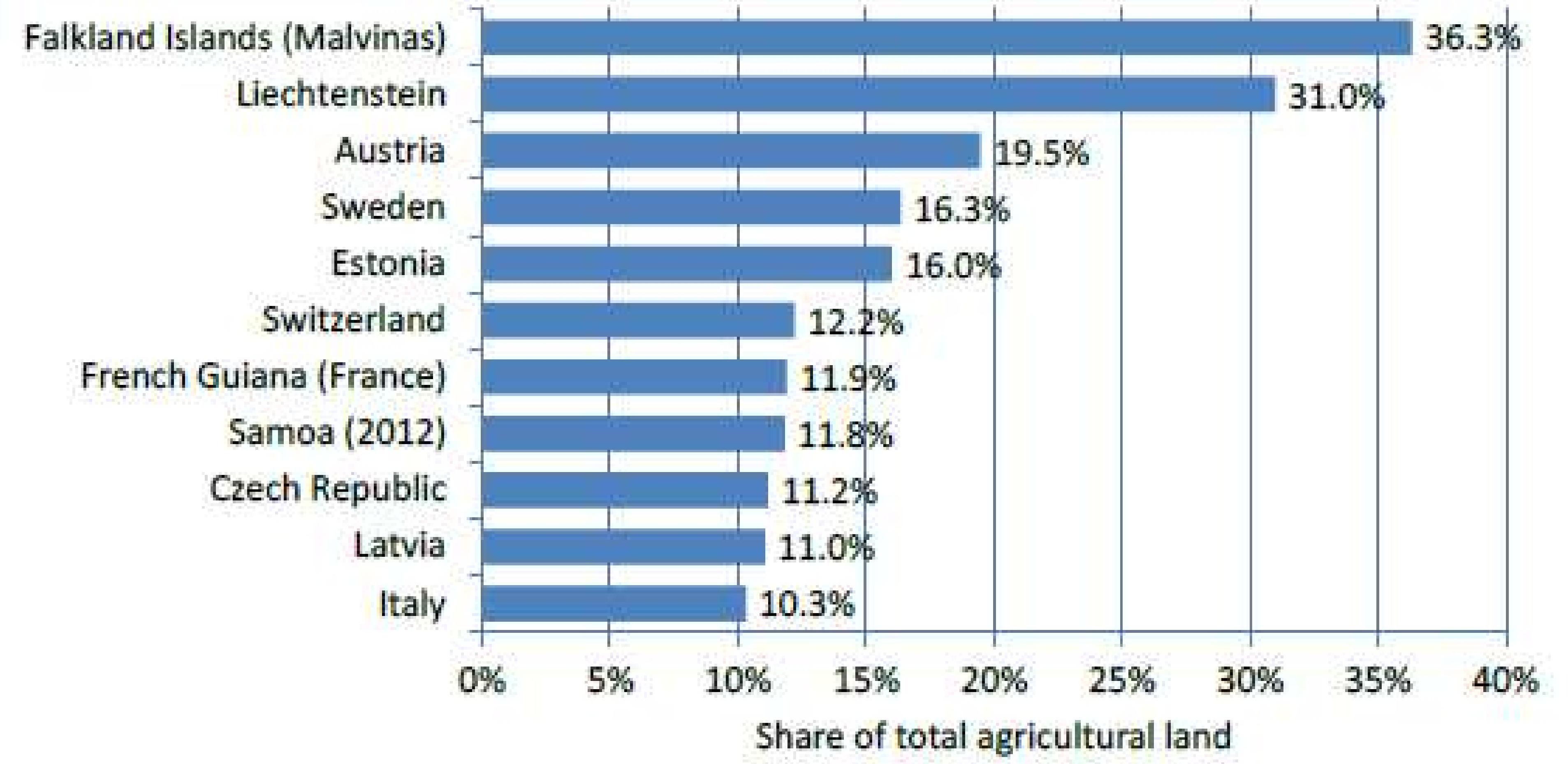
| Country | Share |
|---|---|
| Solomon Islands | 1.6% |
| Réunion (France) | 1.5% |
| Israel | 1.4% |
| Tunisia | 1.4% |
| Bhutan | 1.3% |
| Belize | 1.3% |
| Canada | 1.3% |
| Tonga | 1.3% |
| Ireland | 1.3% |
| Niue | 1.2% |
| Republic of Korea | 1.1% |
| Dominica | 1.0% |
| Martinique (France) | 1.0% |
| Ukraine | 1.0% |
| New Zealand | 0.9% |
| Moldova | 0.9% |
| Philippines | 0.8% |
| Honduras | 0.8% |
| Sri Lanka | 0.7% |
| United Arab Emirates | 0.7% |
| Taiwan | 0.7% |
| Grenada | 0.7% |
| Panama | 0.7% |
| Cook Islands | 0.7% |
| Nicaragua | 0.7% |
| United States of America | 0.6% |
| Montenegro | 0.6% |
| Ecuador | 0.6% |
| Tanzania | 0.5% |
| Fiji | 0.5% |
| Azerbaijan | 0.5% |
| Bahamas | 0.5% |
| Ethiopia | 0.5% |
| Guadeloupe (France) | 0.5% |
| El Salvador | 0.4% |
| Iceland | 0.4% |
| Costa Rica | 0.4% |
| China | 0.4% |
| Lebanon | 0.4% |
| Viet Nam | 0.4% |
| Malta | 0.4% |
| Guatemala | 0.3% |
| Paraguay | 0.3% |
| Macedonia (FYROM) | 0.3% |
| India | 0.3% |
| Jordan | 0.3% |
| Lao People's Democratic Republic | 0.3% |
| Japan | 0.3% |
| Brazil | 0.3% |
| Tajikistan | 0.3% |
| Democratic Republic of the Congo | 0.2% |

| Country | Share |
|---|---|
| Nepal | 0.2% |
| Rwanda | 0.2% |
| Ghana | 0.2% |
| Cambodia | 0.2% |
| Thailand | 0.2% |
| Serbia | 0.2% |
| Haiti | 0.2% |
| Chile | 0.1% |
| Syrian Arab Republic | 0.1% |
| Kazakhstan | 0.1% |
| Burkina Faso | 0.1% |
| Togo | 0.1% |
| Jamaica | 0.1% |
| Indonesia | 0.1% |
| Guinea-Bissau | 0.1% |
| Cuba | 0.1% |
| Sudan | 0.1% |
| Côte d'Ivoire | 0.1% |
| Bolivia | 0.1% |
| Pakistan | 0.1% |
| Georgia | 0.1% |
| Senegal | 0.1% |
| Bangladesh | 0.1% |
| Colombia | 0.1% |
| Madagascar | 0.1% |
| Russian Federation | 0.1% |
| Benin | 0.1% |
| Namibia | 0.1% |
| Armenia | 0.1% |
| Albania | 0.1% |
| South Africa | 0.04% |
| Zambia | 0.03% |
| Kosovo | 0.03% |
| Morocco | 0.03% |
| Mozambique | 0.03% |
| Kyrgyzstan | 0.03% |
| Burundi | 0.03% |
| Iran (Islamic Republic of) | 0.03% |
| Lesotho | 0.02% |
| Saudi Arabia | 0.02% |
| Kenya | 0.02% |
| Mauritius | 0.02% |
| Bosnia and Herzegovina | 0.01% |
| Mali | 0.01% |
| Malaysia | 0.01% |
| Myanmar | 0.01% |
| Andorra | 0.01% |
| Cameroon | 0.01% |
| Malawi | 0.005% |
| Angola | 0.004% |
| Zimbabwe | 0.002% |
| Venezuela (Bolivarian Republic of) | 0.002% |
| Oman | 0.002% |
| Algeria | 0.002% |
| Iraq | 0.001% |

| Country | Share |
|---|---|
| Uzbekistan | 0.001% |
| Nigeria | 0.0003% |
| Swaziland | 0.0003% |
| Niger | 0.0002% |
| Afghanistan | 0.0002% |
| Mayotte | - |
| Belarus (Wild collection only) | |
| Bermuda (Processing) | |
| Chad (Wild collection only) | |
| Guyana (Wild collection only) | |
| New Caledonia (PGS group)* | |
| San Marino (Processing) | |
| Singapore(Processing) | |
| Total | 0.98% |

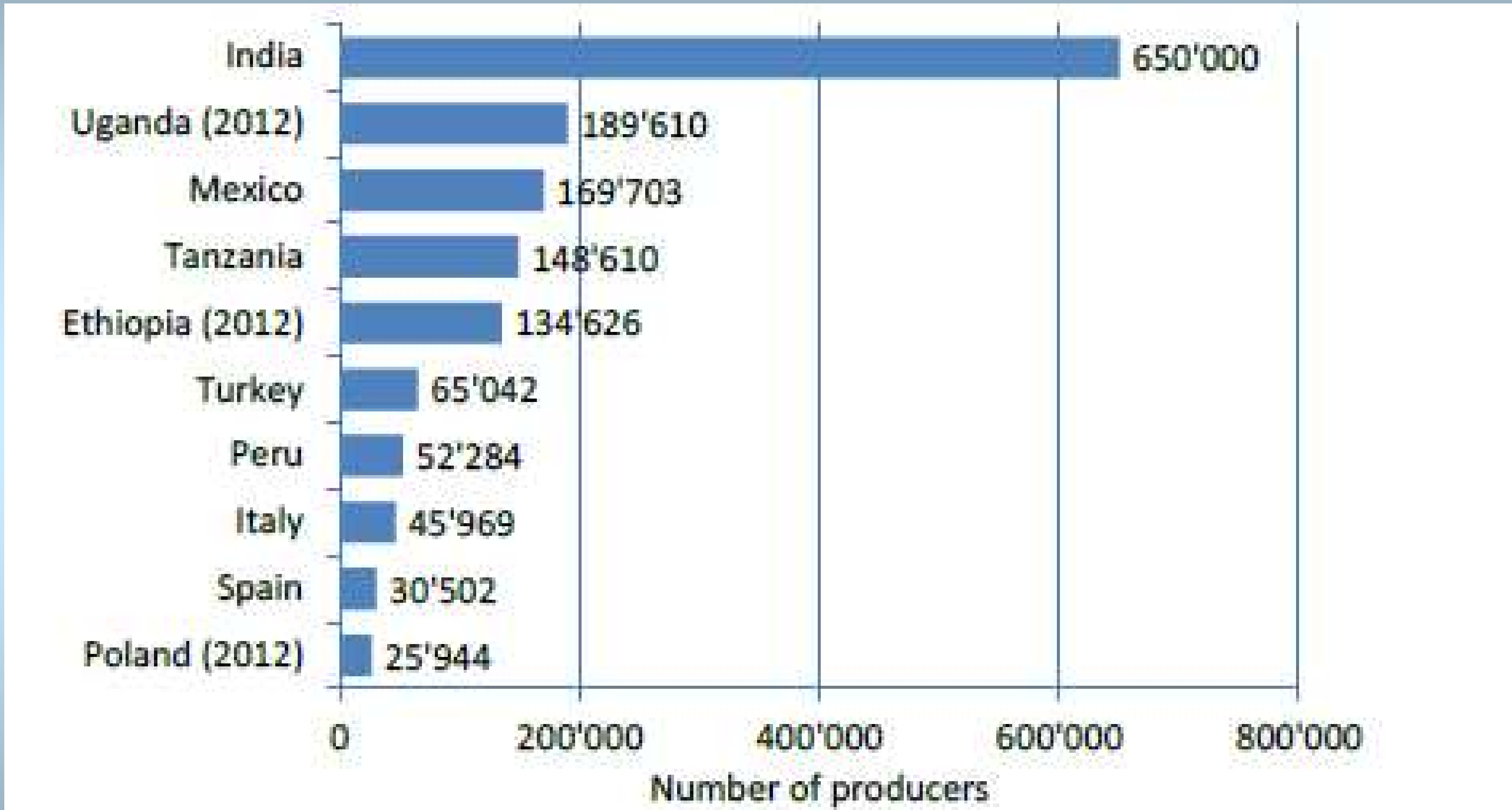
Source: FIBL & IFOAM (2015): The World of Organic Agriculture 2015. Frick and Bonn, pp.41-42

# Countries with more than 10% organic agricultural land (2013)




Source: FIBL & IFOAM (2015): The World of Organic Agriculture 2015. Frick and Bonn, pp.40

# World: the ten countries with the largest numbers of organic producers (2013)




Source: FIBL & IFOAM (2015): The World of Organic Agriculture 2015. Frick and Bonn, pp.57

# Organic farming in Romania

## LEGISLATION

Commission Regulation (EC) no. 2092/1991 - organic farm production

Commission Regulation (EC) no. 1698/2005 - non-refundable support

Commission Regulation (EC) no. 1071/2005 - co-financing programs

Law no. 38/2000 - organic agri-food products

Order no. 527/2003 - rules, certification, accreditation

## INSTITUTIONS

- Ministry of Agriculture and Rural Development (MADR)
  - Office of the National Authority for Organic Products (ANPE)
    - The National Agency For Agriculture Consultancy (ANCA-n.l.e)
    - The Academy of Agricultural and Forestry Sciences (ASAS)
    - Higher education institutions, agricultural research institutes and stations
    - The National Organic Farming Federation

# Organic farming in Romania

## POLICY

- The governmental policy is elaborated and coordinated by MADR
- MADR established an action plan for the development of the domestic market of organic products, which includes:
  - The intensification of actions promoting the organic farming concept;
  - The improvement of information on organic farming practice, and the qualification of the participants in this sector;
  - The increase of areas under the experimental modules “organic micro-farms”;
  - The delimitation of organic farming areas;
  - Support to farmers during the conversion period;
  - The creation of an information system accessible to farmers.

# Organic farming in Romania

## Areas and livestock herds before EU accession

| Specification | Index | | | | | | 2006 |
|---|---|---|---|---|---|---|---|
| | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | |
| **Total area**, out of which: | 100 (17,438 ha) | 1.65 | 2.51 | 3.28 | 4.23 | 6.33 | ***8.20*** |
| **-Cereals** | 100 (4,000 ha) | 2.00 | 3.00 | 4.00 | 5.12 | ***5.52*** | 4.08 |
| **-Pastures** and fodder crops | 100 (9,300 ha) | 1.51 | 2.15 | 2.58 | 3.37 | 4.55 | ***5.51*** |
| **-Oilseeds** and protein crops | 100 (4,000 ha) | 1.58 | 2.50 | 3.90 | 5.02 | 5.65 | ***5.97*** |
| **-Vegetables** | 100 (38 ha) | 2.63 | 18.40 | 5.26 | 7.89 | 11.58 | ***18.95*** |
| **-Fruits** (sour cherries, cherries, apples) | - | - | 100 (50 ha) | 2.00 | 4.00 | ***8.64*** | 5.84 |
| **-Spontaneous flora** collection | 100 (50 ha) | 2.00 | 6.00 | 8.00 | 10.00 | 352.60 | ***774.00*** |
| **-Other crops** | 100 (50 ha) | 6.00 | 16.00 | 18.00 | 18.00 | 97.68 | ***242.00*** |

*Source: calculations based on MADR data*

# Organic farming in Romania

## Production before EU accession

| Specification | Index | | | | | | 2006 |
|---|---|---|---|---|---|---|---|
| | **2000** | **2001** | **2002** | **2003** | **2004** | **2005** | |
| **Total crop** production, out of which: | 100 (13,502 to) | 1.81 | 2.39 | 2.25 | 6.46 | 9.77 | ***12.34*** |
| -**Cereals**, out of which: | 100 (7,200 to) | 1.74 | 2.22 | 2.00 | 5.69 | ***7.64*** | 6.73 |
| Export | - | - | - | - | 100 (7,100 to) | 1.56 | ***2.55*** |
| -**Oilseeds** and protein crops, out of which: | 100 (5,500 to) | 1.31 | 2.00 | 2.27 | 6.73 | 8.29 | ***13.29*** |
| Export | - | - | - | - | 100 (9,800 to) | 1.23 | ***2.26*** |
| -**Vegetables** | 100 (600 to) | 6.67 | 6.67 | 3.33 | 5.00 | 12.00 | ***14.51*** |
| -**Fruits** (sour cherries, cherries) | - | - | 100 (200 to) | 1.50 | 2.50 | ***5.00*** | 1.70 |
| -**Spontaneous flora** collection, out of which: | 100 (200 to) | 2.00 | 1.50 | 1.60 | 22.50 | 83.74 | ***124.81*** |
| Export | - | - | - | - | 100 (3800 to) | 3.74 | - |
| -**Other crops** | 100 (2 to) | 150.00 | 400.00 | 450.00 | 600.00 | 3175.00 | ***5520.50*** |

*Source: calculations based on MADR data*

# Organic farming in Romania

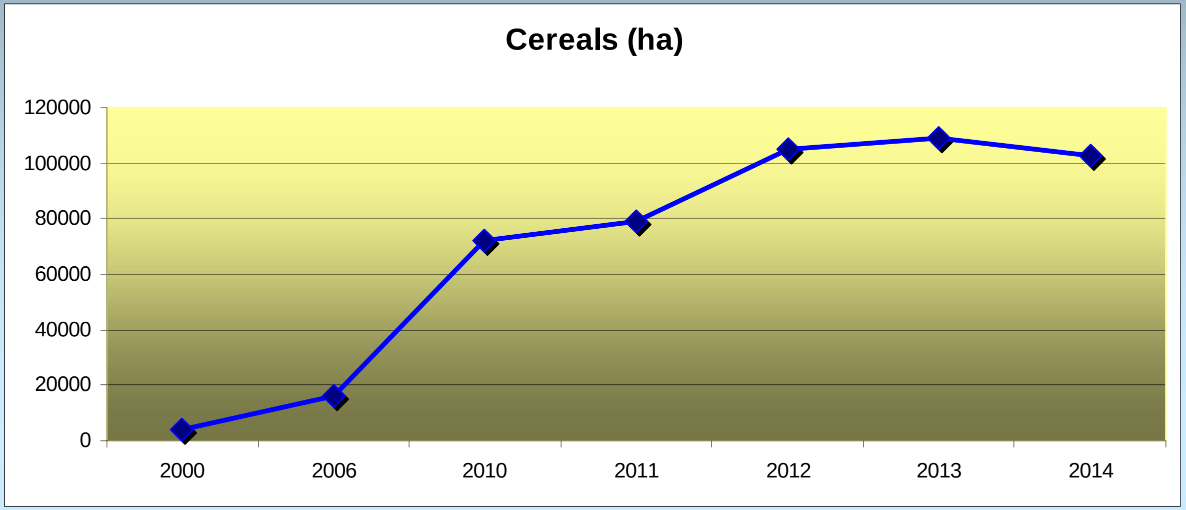
Areas and producers after EU accession

| Indicator | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---|---|---|---|---|---|---|---|---|---|
| No.of farmers | 100 (3409) | 1.12 | 1.23 | 0.95 | 0.93 | 284.63 | 455.97 | 445.70 | 424.46 |
| Area in arable area (ha) | 100 (55605) | 1.43 | 1.90 | 2.41 | 3.25 | 413.53 | 518.41 | 541.58 | 520.19 |
| Area - permanent crops of pastures and fodder (ha) | 100 (51200) | 1.12 | 0.90 | 0.77 | 0.62 | 440.97 | 547.81 | 569.82 | 546.51 |
| Area - permanent crops of orchards and grapevine (ha) | 100 (294) | 3.24 | 5.16 | 6.36 | 10.52 | 1417.22 | 2646.71 | 3197.38 | 3210.38 |
| Spontaneous flora collection (ha) | 100 (38700) | 1.52 | 2.10 | 2.30 | 2.00 | 873.52 | 2796.22 | 2440.69 | 4618.99 |

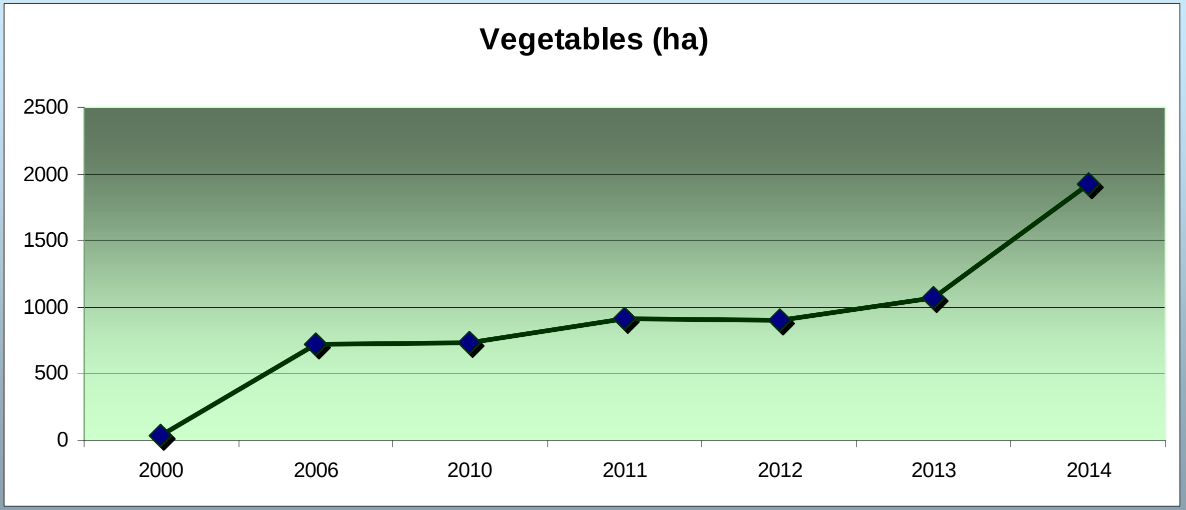
*Source: calculations based on MADR data*

# Organic farming in Romania

## Areas under organic production




*Source: based on MADR data*




*Source: based on MADR data*

# Organic farming in Romania

## Characteristics

• 3409 organic operators were registered at the end of 2006 (2014 = 14470)

• Market organization - www.agricultura-ecologica.ro

• E-Platform: http://www.bioagro.ro (Organic Agriculture eServices System that is developed by the Bio@gro Consortium and financed by the E.C. Commission - DG Information Society)

• Certified organisms for inspection in 2014 = 14 (13)

• Networks registered: 2 shops (end of 2006-Biocoop, Naturalia); 25 shops (2013)

• Organizations in organic agriculture, rural development, environmental protection, and durable development: 32 bodies (2013)

• 5 universities

⇩

**Dynamic sector**

# Organic farming in Romania

## Financial aspects

- *Pre-accession period*
  - SAPARD Program - Measure 3.3 „Agricultural production methods designed to protect the environment and maintain the countryside”, with 3 pilot sub-measures:
    A. Soil conservation and protection against erosion
    B. Biodiversity preservation through traditional farming practices
    C. Organic farming
- *Post-accession period*
  - Structural funds (EAFRD)

# Organic farming in Romania

## OPPORTUNITIES

**Still a big potential on domestic market but with limits**

- **Area & Production increased**
- **Demand increased more rapid ⇒ Imports increased**
- **30% from production is sold on domestic market: Hypermarkets (Metro, Selgros, Carrefour, Cora) & Supermarkets (Gima, La Fourmi, Mega Image, Nic, Primavera, OK) + Minimarkets (in the last years)**
- **Exports: 1.5 mil euro (end of 2006); 150 mil euro (end of 2010)**
- **Imports increased at the beginning, then decreased (economic crysis)**
- **Many unpolluted or low polluted areas (by chemicals) – easier to enter in conversion**
- **Increasing demand on European and world markets**

# Organic farming in Romania

## OBSTACLES

- Organic agriculture can became a non-efficient business in Romania, not because the outlet is not large enough, but rather because the government has not shown enough interest in this activity so far – not enough financial support (producers declarations)
- High production cost
- Extreme weather conditions in the last years
- Difficulties in distribution
- High cost of certification
- High rate of forgery
- Insufficient control of proper use of the organic product logo
- Low domestic demand due to low purchasing power
- Low degree of producers' organization

# Conclusions

**A typical consumer of organic products has the following attributes:**

- **Location – lives in urban areas, usually in a big city;**
- **Buyer Behaviour – discerning towards food and drink purchases, considering factors like quality, provenance and production methods;**
- **Demographics – typically well-educated and belongs to middle-high social classes;**
- **Purchasing Power – in a medium to high-income household with relatively high purchasing power.**

**Consumer concentration:** **Industrialized countries**

**+**

**China, India, Brazil, South Africa (good perspectives)**

**Factors responsible for consumer demand: Premium price; Education**

# Conclusions

**ROMANIAN AGRICULTURE NEEDS:**

- **CLEAR LONG TERM POLICIES BASED ON COMPARATIVE ANALYSIS**
- **WE MUST ANALYSE THE BENEFITS vs. DISADVANTAGES OF:**
  - **CONVENTIONAL AGRICULTURE**
  - **ORGANIC AGRICULTURE**

# Conclusions

We can say when a product is tasty
We cannot say when it is healthy
We assume that we need healthy products
We need information, protection and investments
We must be competitive and choose the right way

# Conclusions

## Ways of improvement of the competitiveness of the Romanian organic sector

- The increase in the number of operators (with financial support from the Romanian Government Programs + EU funds);
- The association of the small organic farmers;
- The increase in the number of municipal and regional organizations;
- The increase in the number of investments in related activities in the rural area and foreign direct investment projects;
- Capacity improvement and diversification of the organic farm output;
- Investments in organic food processing capacities
- The development of upstream and downstream services.

# Thank you for attention !

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