Country Report Organic 2022

ROMANIA

Report on the Status of Organic Agriculture and Industry in Romania

Gefördert durch

Bundesministerium für Ernährung und Landwirtschaft

BÖL
BUNDESPROGRAMM ÖKOLOGISCHER LANDBAU

aufgrund eines Beschlusses des Deutschen Bundestages

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Content

Romania: Facts and Figures

Romania is the country of the Carpathians, the Moldavian Highlands, the Wallachian Plain, the Banat and the Danube Delta. It is an important producer and exporter of grains. However, with its 19.2 million inhabitants, it is also the biggest market in South-Eastern Europe. And as the economy is doing well, it also offers much opportunity in the retailing of quality food and other consumer goods.

Map

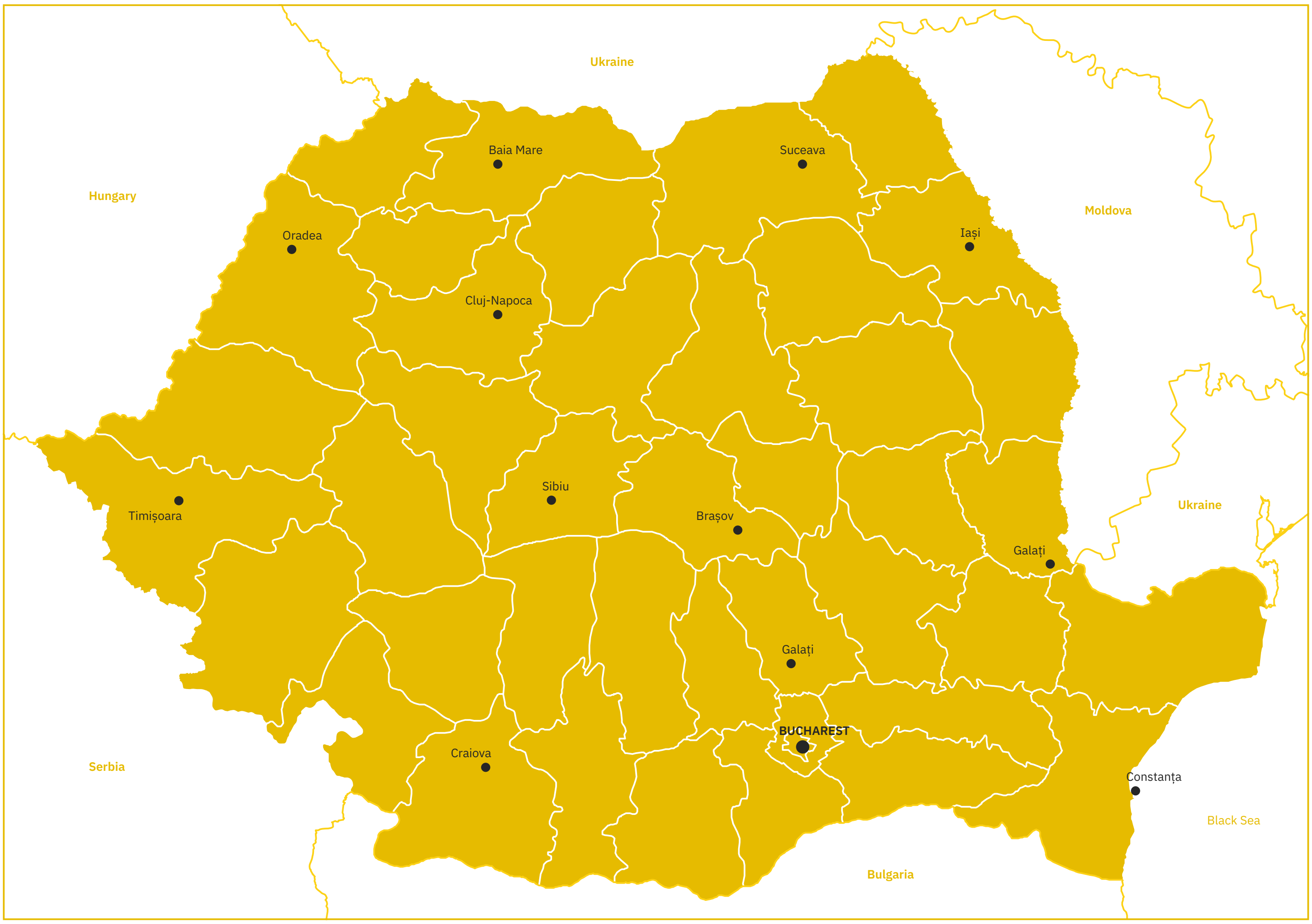

Figure 1: Map of Romania

General Country Information

238,397 km²
Area

19.2 million
Usual resident population (2021)

54 %
Urban population

14,581 EUR
GDP per capita (2021)

63 %
GDP shares from services

33 %
GDP shares from industry

4 %
GDP shares from agriculture

3.1 %
Remittances of GDP (202o)

Geography

Romania is situated in South-Eastern Europe at the lower course of Danube River. The country is divided by the Carpathian Mountains into three major historical regions: In the Centre and West of Romania, the Transylvanian Highlands, enclosed by the Carpathian Arc; the Moldavian Highlands in the North-East of Romania; and the Wallachian Plain with the capital Bucharest. In the far West, on the border with Hungary and Serbia, lies the Pannonian Plain with the Banat. To the South-East lies the Danube Delta and the hills of Dobruja, bordering the Black Sea.

Most important cities (and number of inhabitants) are:

— In the Wallachian Plain: Bucureşti or Bucharest (1.9 m)
— In Transylvania: Cluj-Napoca (0.3 m), Brașov (0.3 m) and Sibiu (0.2 m)
— In the Pannonian Plain: Timişoara (0.3 m)
— In the Moldavian Highlands: Iaşi (0.3 m) and Galați (0.2 m)
— On the Black Sea: Constanța (0.3 m)

Land

59 % of Romania's surface is agricultural area (made up of 38 % arable land, 19 % pastures, 2 % permanent crops). 29 % is forest area. The most fertile land in Romania is situated on the Western side of the country (in the Pannonian Plain), in the South 100 km along the Danube River and in the East in the Moldavian region.

The farm structure is bipolar. While 90 % of the farms have a size of 1–5 ha and use about 23% of the agricultural land, 1 % of the farms have a size of over 50 ha and use more than 53 % of the agricultural land in the country. 16,000 farms have a farm size of >100 ha with average sizes of 400 ha per farm (Eurostat, figures for 2020).

Map of the yield capacities of Romania's agricultural soils

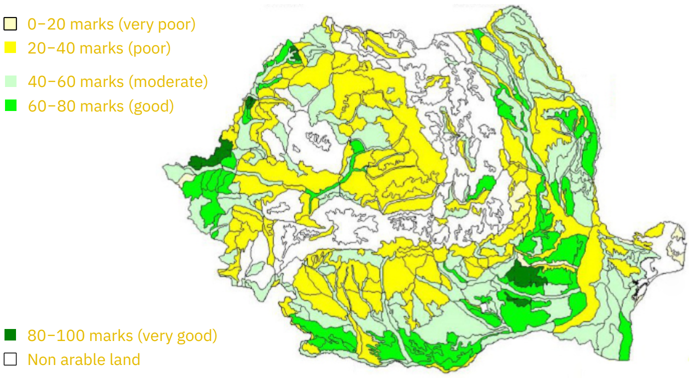

Figure 2

Climate

Due to the natural barrier of the Carpathians, the individual parts of the country differ greatly from each other climatically. The regions West of the Carpathians are characterised by the maritime climate of Atlantic westerly winds. Here, precipitation averages 650 mm a year with a peak in early summer. The Carpathians prevent these winds from reaching the East and South of the country. The Moldavian highlands East of the Carpathians have a continental climate with cold air currents in winter coming from the East. Precipitation averages 590 mm a year with a peak also in early summer. The situation is different in Wallachia and Dobruja in the South and East of the country which are under Mediterranean influence. While only the September is arid in Bucharest (580 mm total precipitation), Constanța (400 mm total precipitation) already has 3 arid months (July to September).

History

The word Romanian comes from citizen of Rome who colonised the land of Dacia. Being much influenced by the surrounding Slavic nations, Romanians are the only nation from the Latin family with a majority of orthodox population. In the medieval ages, they lived in three Kingdoms on the current territory: Wallachia, Transylvania and Moldova which where occasionally under other Empires' dominions or independent but got all three united after the 1st World War.

From 1944 to 1989, Romania was a satellite of the Soviet Union with a communist system of economy and a totalitarian regime. From 1950, agriculture was nationalised. Along with relocating parts of the rural population to the cities, the countryside was to be industrialised. However, the desired success did not materialise. Instead, the national economy collapsed, forcing the regime to export agricultural commodities. As a result, the standard of living in Romania dropped to a uniquely low level in Europe. Food was rationed from 1982 until the collapse of the communist state.

In the 1990s, the country began a transition towards democracy and market economy, hand in hand with land privatisation and foreign direct investments. In 2004, Romania became a NATO member and in 2007, the country joined the European Union.

Economy and Trade

Following a rapid economic growth in the early 2000s, Romania's economy is now predominantly based on services, like trade, hotels/restaurants/caterer (HoReCa), transport and retail. Export is dominated by machines and vehicles, followed by processed metals and products of the chemical industry. Germany, Italy, Hungary and Poland are the most important trading partners (three quarters of imports and exports). Romania had a negative trade balance of 32 % in 2021.

Agriculture accounts for only 8% of the exports, but involves 26 % of the Romanian workforce. Grains play a dominant role (mostly maize, wheat and barley) as well as oil crops (mainly sunflower, rape seeds and soya beans). Romania is the biggest exporter of maize in the EU and 3rd in the world (7 m tons in 2021). Another stronghold is the tobacco industry with 1.6 b USD of export value in 2021 making it the Number 4 in the world. Exported live animals, meat, dairy products and fish account for 1.2 b USD of all agri-food exports. The horticulture subsector is under-developed and has six times more imports than exports by value.

40 % of the electricity is produced by burning fossil fuels, 18 % comes from the nuclear power plant of Cernavodă and 42 % is generated from renewable sources, mainly hydroelectric and wind power. Romania has considerable gas reserves and with the development of offshore projects, self-sufficiency in gas is expected to rise giving great advantage in the context of the current energy crisis.

Exports from Romania according to monetary value (2021 | %)

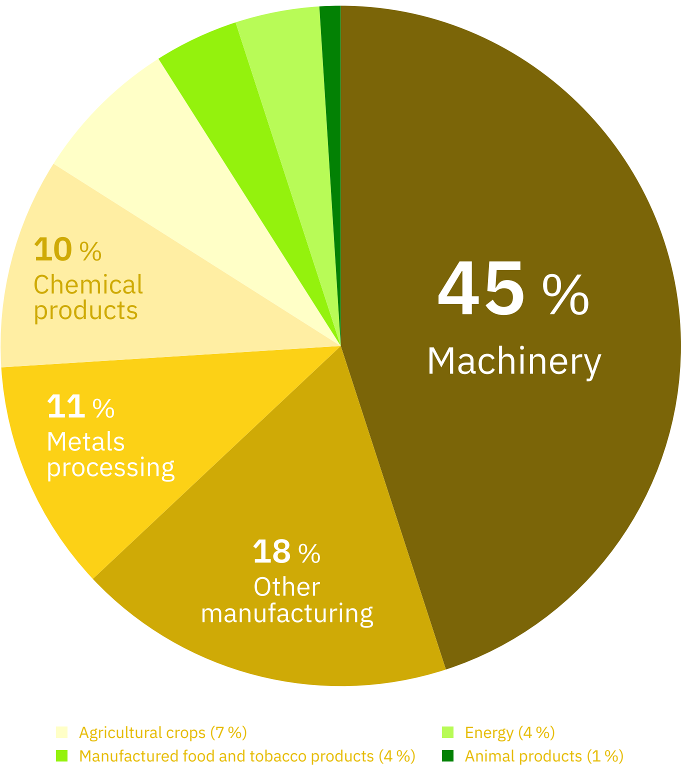

Figure 3

Agri-food exports from Romania according to monetary value (2021 | %)

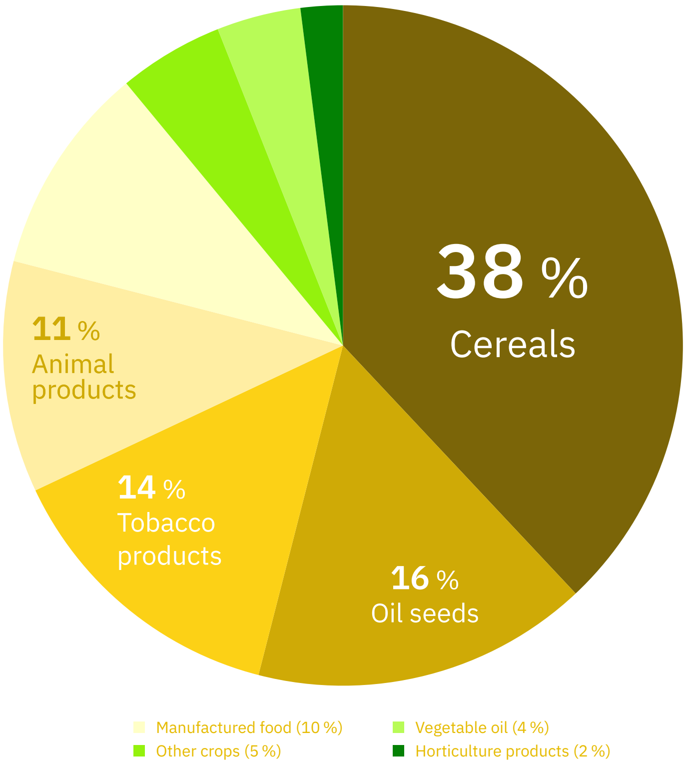

Figure 4

History and Development of Organic Farming in Romania

Organic farming started in Transylvania, but only when after EU accession the large grain producers of Banat and Wallachia joined in, the organic area started to grow significantly. Today, organic farms in Romania are highly commercial and provide good prospects for the younger generation to make use of market opportunities whether in the area of horticulture, beekeeping and dairy in Transylvania or in arable crops in the country's fertile plains.

After 1992, a movement of farmers from Transylvania gave up using chemical crop protection products and mineral fertilizers being the pioneers of organic farming in Romania. In 1993, a group of Swiss farmers, linked to a Christian organisation, offered Romanian farmers training and internships in Switzerland for organic agriculture. In 1997, these Romanian farmers founded the first association of organic farmers: **Bioterra**. This brought the sector to the next level. Albert Imre from Transylvania was the first to get his farm certified, being inspected by Biokontroll from Hungary. In 2002, Bioterra founded the first Romanian control body (CB), Ecoinspect, which was accredited by the Ministry of Agriculture in 2004.

In parallel, the Vegetable Research and Development Station in Bacău started to conduct trials for organic vegetables cultivation in 1992, and since 1995, the National Agricultural Research and Development Institute in Fundulea has been working with organic field crops.

After the endorsement of the National Organic Farming Law (34 / 2000) in 2000, the Ministry of Agriculture started to support organic farmers with subsidies in 2005. The strongest boost, however, came only with the country's accession to the EU in 2007 when Romania had European funds available for organic subsidies. A great market opened up for Romanian products, especially plant-based raw materials (grains, oil seeds and vegetable oil) which were sold and processed in the West.

In 2001, there were 72 certified organic operators in Romania. A dynamic growth was underway until 2012 when this number grew to 15,280. This growth is explained by the enthusiasm caused by available EU funds and the hope for higher prices paid by organic markets. However, when these expectations went unmet as structures for processing and marketing were not established alongside organic production, and traders could just sell organic raw material at conventional prices, the number of organic operators decreased again between 2013 to 2017. Also the organic acreage decreased slightly during this time. From 2018, the number of organic operators then picked up again with about 700 new companies per year. **The latest figure for 2021 is 11,029**. The organic area (fully certified and in conversion, but not wild collection area) in 2021 is estimated at **520 to 570 thousand ha** or **about 4 %** of total agriculture land. It is made up of two thirds of crop land (of which 7 % are permanent crops) and one third of permanent grassland. Since 2018, every year about 70,000 ha have added to the organic land which represents a growth of 15–25 % per year. This new trend is explained by the much higher profitability of farms cultivating organic arable crops on large surfaces in the plains in comparison to small farms in mountain areas who were the drivers of growth in the 2000s.

In 2012, the average organic farm had a size of about 20 ha which grew to 50 ha in 2021. This is much more than the national average farm size of only 4.8 ha, a figure that shows the high level of subsistence farming of the elderly generation still after 30 years being part of the market economy. Organic certified farms on the contrary hardly practice any subsistence farming. Organic farms in Transylvania tend to be smaller (starting with 2 ha) and are engaged in horticulture, beekeeping and ruminant livestock while the ones from Banat and Wallachia are larger (hundreds of ha) and tend to fully concentrate on arable crops. The highest number of organic farms is found in Sălaj and Satu Mare counties (830 each) in Transylvania while with regards to surface, Tulcea in the Danube delta and Timiș in Banat have the largest organic area (about 60,000 ha each).

It is striking that only about 60 % of organic farms are fully certified. This can be attributed to the fact that many farms give up organic practices at the end of the conversion period because of smaller subsidies after obtaining the certificate and of hardly finding a significantly better market for organic than conventional produce. In 2022, these price differences hit a record low.

Evolution of number of organic operators and area
(2009–2021 | thousand ha | thousand operators)

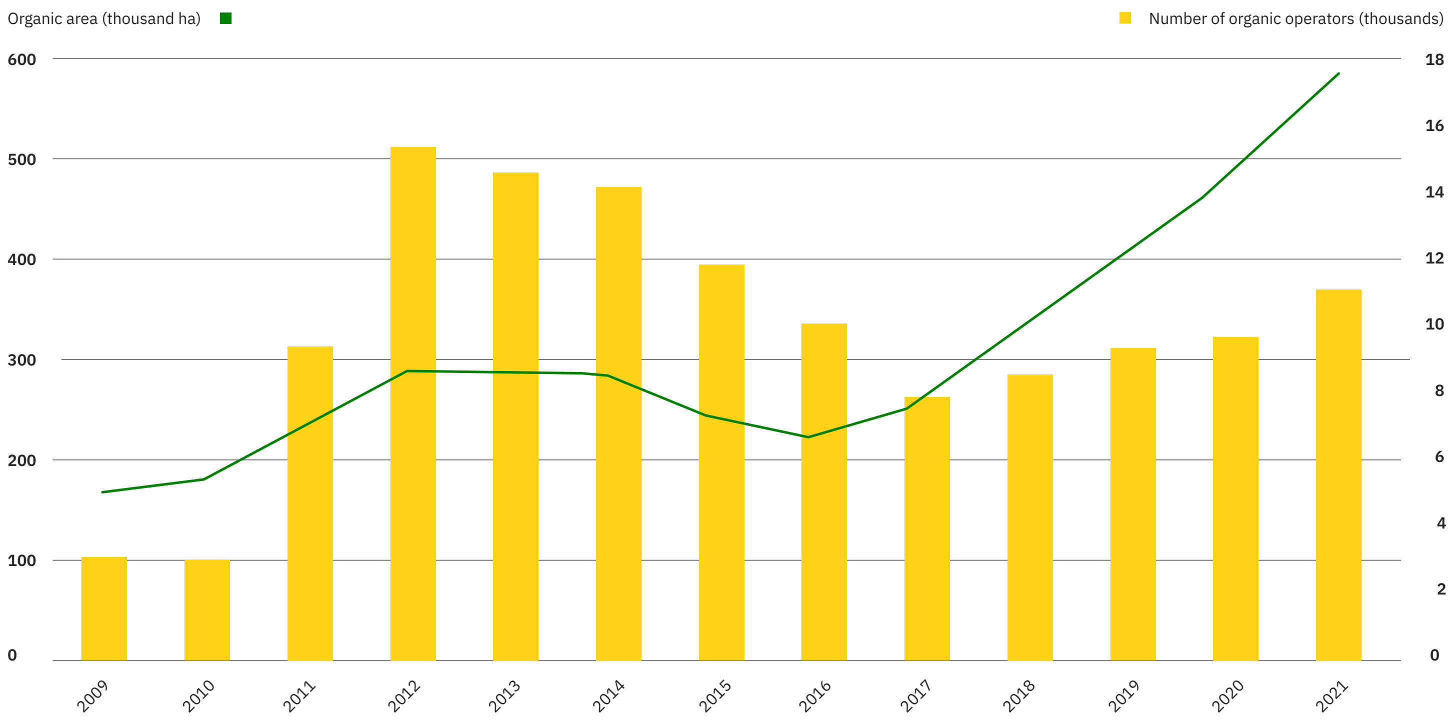

Figure 5

Institutions of Organic Food and Farming

Associations no longer play the role they used to have in the 2000s. Today, many got inert. However, the mix of NGOs, state research institutes, state advisory services, universities and commercial input providers ensures that organic farmers in Romania receive the support they need. The trade show Ecostart Expo and the event Vegetables & Fruits: Organic shelf, are now the most important organic networking events in the country.

More than 30 associations of organic farmers in Romania have helped to unite farmers of different organic sectors and regions of the country. Historically, these associations boosted organic farming in Romania. Today, however, the significance of many is in decline. They have largely neither managed to generate sufficient membership funds nor to provide paid services. This lets them be in competition for public funds. When these public funds from Government, EU, IFOAM, FiBL and other institutions flow, they become active, but after project funding they return to inertia. This, unfortunately, is also true for the Bioterra, Romania's first and flagship organic association.

There are 6 entities representing Romania at IFOAM. The associations Inter-Bio and Bio Romania and the control bodies EcoCert and Bio Cert Traditional are voting members. The lavender producer Evergreen Estates is an associate member and Laura Dosoftei who runs the organic sales agency Optim Agro is a supporter.

Those associations which are most active, such as Inter-Bio, have been organising public events in which organic agriculture stakeholders meet. The national agricultural fairs Indagra and Agraria do not dedicate much effort to organic food and farming. Despite there had been organized some national and regional trade fairs dedicated to organic agriculture, a trail for a new format has been initiated by the input supplier Ecostart in February 2023 in Iași, called Ecostart Expo. It had the aim to be a meeting place for organic farmers, service providers, input suppliers and traders. Since 2019 Ecostart organizes seminars and provides consultancy about organic agriculture. The event which recently met most response among organic stakeholders from the horticulture sector has been "Fruits & Vegetables: The organic shelf" („Legume & Fructe: Raftul Bio" in Romanian) organised by Modern Buyer. On 24 November 2022 its second edition took place in Bucharest. It is at the same time conference and exhibition of organic producers and input suppliers.

Associations of organic farmers

Association of Organic Farmers Bio Romania

Bio Romania was founded in 2008 as an attempt to represent a number of processors and larger producers internationally, e.g. at Biofach where Bio Romania has had a yearly stand. The association is involved in a number of projects some of them dealing with biodiversity conservation. Bio Romania represents Romania at the IFOAM EU Group (together with Inter-Bio and the CB Bio Cert Traditional).

www.asociatia.bio

Inter-Bio

Inter-Bio was founded in late 2018 and is the other association representing Romania at the IFOAM EU Group. It is linked to Costin Lianu from the business development domain. It has been oriented towards organic businesses in the South of the country seeking international attention towards particular value chains and producers and advocating for direct investments into larger organic companies.

www.inter-bio.ro

Bio Danubius

Bio Danubius calls itself a cluster of stakeholders of organic and environment conservation agriculture of the Danube region including its delta. It was founded in 2015 and is itself a founder of Inter-Bio. In this way, the association mainly represents organic grain and oilseed producers of the Tulcea area.

www.biodanubius.ro

Association of Organic Farmers from Romania Bioterra

Founded in 1997 by a group of Swiss and Romanian farmers, Bioterra has been the first organic association in Romania which initially meant to represent mostly smaller organic farmers from Transylvania. Among all associations, it has been the most active until today. The association contributed to the elaboration of the national organic regulation in 2000 and founded the EcoInspect CB in 2004. In contrast to other organic producer associations in Europe, Bioterra never developed an own, private organic standard and therefore never used its label for an effective marketing of organic products.

www.bioterra.org.ro

Romanian Association for Sustainable Agriculture

The association (abbreviated as A.R.A.D. in Romanian) was founded in 1998 by Ion Toncea, a university lecturer and researcher, and some students passionate for sustainable agriculture. They started with research projects funded by the Ministry in the area of field crops. Around them gathered private companies that benefitted from this research and consultancy. 15 companies and 12 researchers and university staff are associated with A.R.A.D.

www.agriculturadurabila.ro

EcoRuralis

EcoRuralis operating from Cluj Napoca in Transylvania is a Romanian association of small farmers and was founded in 2009. It says that it represents the interests of 17,000 small traditional and organic farmers to national and European authorities. The association is member of the European Peasants Confederation Via Campesina. EcoRuralis is funded partly by membership fees, but mostly by European projects as well as donations. It has no explicit focus on organic agriculture.

www.ecoruralis.ro

National Federation of Organic Agriculture

In 2000 the National Federation of Organic Agriculture was founded by five organic associations: Bioterra, AgroEcologia, AgriEco, A.R.A.D. and EcoRuralis. Its head was the university lecturer Ion Toncea and main activities were consultancy and representing Romania at IFOAM; however, the “federation” has fell dormant for few years now.

The large **state research institutions** conducting agricultural trials all have a branch working on organic topics.

The main institutes are:

- National Agricultural Research and Development Institute in Fundulea for field crops
- Research Institutes for Horticulture in Bacău, Pitești, Vidra and Buzău
- Research and Development Institute for Plant Protection in Bucharest
- National Research and Development Institute for Food Bioresources in Bucharest

Research institutes extend knowledge in organic agriculture by organising field days and developing protocols and guides. They dispose of organic certified land where they conduct trials and demonstrations. They also provide consultancy for the private sector even though usually larger agricultural operators benefit most. They are partially financed by the state but also participate in international projects which constitute a very important part of their income along with selling the organic crops and food items they produce on the local market.

The National Agency for Agricultural Consultancy (**ANCA**) is the State organisation for agricultural extension under the Ministry of Agriculture. Founded in 1998, ANCA has offices in every county to train small farmers in technical aspects and to offer assistance for accessing public funds. ANCA offers a general course on organic agriculture which farmers during conversion should take to be eligible for organic subsidies. Most farmers do not receive advisory support from ANCA during conversion; this, however, depends much on the local specialists working for ANCA in the individual counties.

The Bachelor courses at the four Romanian agricultural **universities** of Bucharest, Cluj-Napoca, Iași and Timișoara all have modules with topics of organic agriculture. Moreover, all four institutions offer specialisations for Master degree students which allows them to focus on organic field crops or organic horticulture. Some other Romanian universities offer Master courses linked to organic farming and food, too, such as the Organic Agriculture Course at Ovidius University of Constanța, the Organic Food Processing course at Transylvania University of Brașov, and the Plant Protection Course at Sapientia Hungarian University of Transylvania in Târgu-Mureș.

Figure 6: Fundulea Research Institute serves large scale organic grain farming

Info

National Agricultural Research and Development Institute Fundulea

www.incda-fundulea.ro

Vegetable Research and Development Station – Bacău

www.legumebac.ro

Research Institute for Fruit Growing Pitești

www.icdp.ro

Research Institute for Vegetable and Flower Growing Vidra

www.icdlfvidra.ro

Figure 7: Organic dairy shelf in Carrefour, by A. Lozan

Other players which can provide a better continuity of their support are **large retailers**. They have been prompted by law (321 / 2009) until 2020 to acquire 51 % of the meat, eggs, fruits, vegetables, honey, dairy and bakery products they sell from direct partnerships with local farmers. In this context, some supermarkets, like Carrefour in the last 5–7 years, have decided to get involved in training programmes for organic farmers and cooperatives.

A few **commercial companies** in Romania offer market-oriented advisory services. Some of them are individual independent consultants, mostly, however, they are linked to larger suppliers of agricultural inputs and machinery. They usually advise organic farmers in areas of tillage, variety and seed selection and crop protection. The Ministry of Agriculture published a list with 132 of such distributors of crop protection chemicals offering products allowed in organic agriculture (Chapter J).

Info

Research and Development Station for Vegetable Growing Buzău

www.scdlbuzau.ro

Research-Development Institute for Plant Protection Bucharest

www.icdpp.ro

National Research and Development Institute for Food Bioresources Bucharest

www.bioresurse.ro

Organic Legal Frame and Subsidy System

The total amount of subsidies paid out by the Romanian State to organic farms is significant: in 2021, a total of 92 million EUR were disbursed. This was an increase of 25 % to 2020. In fact, the development of organic farming has always been closely intertwined with the subsidy system.

Being part of the EU since 2007, the EU legislation on organic farming is fully implemented. The Agricultural Ministry’s Decree no. 895 / 19 of August 2016, modified by Decree 148 / 2021, define the rules and responsibilities for the implementation of the EU organic legislation. The Ministry of Agriculture is the competent authority responsible for the implementation of the organic legislation as well as for the approval and surveillance of all private control bodies in Romania. There are 41 counties in Romania, each with its Directorate of Agriculture and one person responsible for all organic issues, including the registration of organic operators and any derogations.

Figure 8: National logo for organic agriculture

Romania has a national organic logo which corresponds to the term “ecological” most widely used among consumers for organic products. The use of this national logo which is owned by the Ministry of Agriculture is voluntary and must be accompanied, if used, by the EU logo, the code of the control body and a statement of the origin of the raw material (e.g. “Romania(n) agriculture” or “EU agriculture”). The rules for the usage of the “ae” logo are defined by Decree 317 / 190 / 2006.

The Government supports organic farming through its Payments and Intervention Agency for Agriculture (APIA) by offering subsidies for the conversion period and for maintaining the organic certificate after conversion.

Info

Organic desk of the Ministry of Agriculture and Rural Development

— Contact: ae@madr.ro (Mrs Iulia Grosulescu)

42 % of the subsidies in 2021 were invested to support conversion and 58 % for the maintenance of certificates. Over 70 % of the funds were absorbed by arable farming (grains, oilseeds and pulses).

Available subsidies for organic operators in 2022 according to APIA (EUR | ha & year)

Type of land use	For conversion	For maintaining the certificate
Arable crops	293	218
Vegetables	500	431
Orchards	620	442
Vineyards	530	479
Medical and aromatic plants	365	350
Permanent grassland if no environmental subsidies are provided	143	129
Permanent grassland if additional environmental subsidies are provided	39	73

Figure 9

Share of organic subsidies in Romania for different types of agricultural land use (2021 | %)

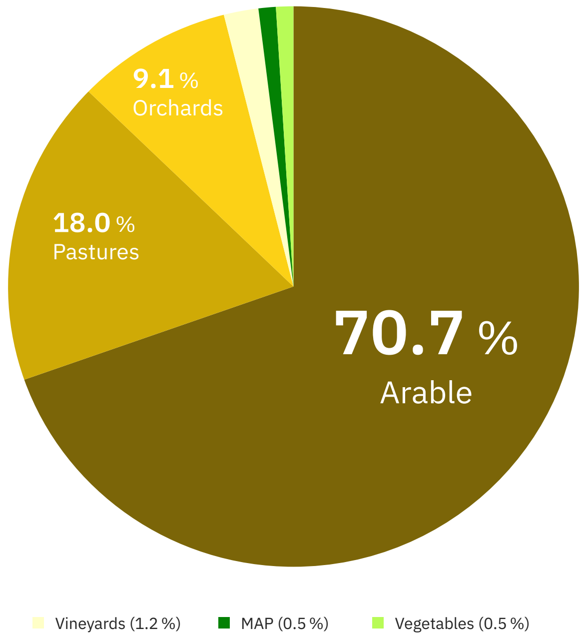

Figure 10

Organic Control and Certification

14 Control Bodies are currently accredited for the certification of organic farming, processing and trade. The two most active CBs, EcoCert and EcoInspect, inspect more than half of all organic operators. Six of the CBs are Romanian while eight have their headquarters in other EU countries.

The number of 11,029 certified operators includes 10,450 farms, 165 processors, 27 companies dealing with wild collection, 5 operators in the area of aquaculture and 382 trading companies. Processors have mostly chosen EcoInspect (43 companies), followed by Austria Bio Garantie (34), EcoCert (19) and Bios (17). Wild collection companies are certified by EcoInspect (10), Ceres (8) and EcoCert (5). Trading companies prefer Eco-Inspect (77), Austria Bio Garantie (74) and SRAC Cert (63). Austria Bio Garantie seems to be of advantage for companies that work on markets of German speaking countries.

According to the Biodynamic Federation Demeter International, in October 2021, there were 24 operators with 373 ha certified **Demeter** by the federation's International Certification Office ICO. The ICO's database showed fewer certified farms at the end of 2022. The most important is the winery of Domeniul Bogdan with more than 150 ha of Demeter-certified vineyards – the only Romanian biodynamic wine produced since 2020.

In 2022 **Naturland** reports six Naturland-certified farms with 4,450 ha in total of which more than half is for organic oil seeds and about one third for organic grains – all produced for the German market.

Three companies are certified according to the American **NOP** standard: Biochem Organics for the production of grains, Biorom Ralex for wild collection of berries and Soloverde for the production of sunflower oil.

Recognised Control Bodies in Romania and number of operators certified by them in 2021

Name of the CB	URL	Code	Office in Romania	Country of headquarters	Certified operators
EcoCert	www.ecocert.com	RO-ECO-007	Bucharest	France	3,285
EcoInspect	www.ecoinspect.ro	RO-ECO-008	Cluj-Napoca	Romania	2,474
Bios	www.new.certbios.it/ro	RO-ECO-009	Bucharest	Italy	331
Agreco Göderz	www.agrecogmbh.com	RO-ECO-015	Ploiești	Germany	841
BioAgricert	www.bioagricert.ro	RO-ECO-016	Bucharest	Italy	327
Austria Bio Garantie	www.bio-garantie.ro	RO-ECO-018	Bucharest	Austria	213
Certrom	www.certrom.ro	RO-ECO-021	Bucharest	Romania	465
EcoRoIsCert	www.ecoroiscert.ro	RO-ECO-022	Iași	Romania	420
Mișcarea Română p. Calitate	www.mrco.ro	RO-ECO-023	Craiova	Romania	500
Ceres	www.ceres-cert.de/ro/home	RO-ECO-024	Cluj-Napoca	Germany	345
Bio Cert Traditional	www.biocerttraditional.ro	RO-ECO-025	Constanța	Romania	833
SRAC Cert	www.srac.ro	RO-ECO-026	Bucharest	Romania	905
TÜV Austria	www.tuv-austria.ro	RO-ECO-027	Bucharest	Austria	79
Rina Simtex	www.rinaromania.ro	RO-ECO-028	Bucharest	Italy	11
Total					11,029

Figure 11

Organic Production by Value Chain

Although Romania may be mostly known for its organic honey, walnuts, aromatic plants and berries such as sea buckthorn, in fact grains and oil crops make up half of the organic area. Besides them, permanent pasture and fodder crops constitute the second most important uses of organic land. The third stronghold of Romania's organic production are the vast organic certified wild collection areas which also support organic beekeeping. Only 5.2 % of the organic agricultural land is used for horticulture.

Field Crops

Nearly half of the organic area is used for organic grains and oilseeds and another 12 % for fodder crops which are important in organic farming to sustain soil fertility.

According to a FiBL survey, Romania had about 134,000 ha of organic **grains** in 2020 occupying rank 8 of Europe's of largest organic grain producers after Germany, France, Italy, Spain, Russia, Ukraine and Poland. Most of the organic grain produced in Romania is actually for food and only the smaller part for animal feed. Romania is much more significant in organic **oilseed** production for which it is on 4th position in Europe (90,000 ha, after Russia, France and Ukraine). With 5,700 ha of **pulses**, Romania is only on 17th position in Europe. While organic oilseeds (mostly sunflower rapeseed and soybeans) are in high demand and generate good profits for farmers, a crop rotation with about 40% of oilseeds is not very sustainable in organic farming.

Major crops growing on Romania's certified organic land (2020 | ha)

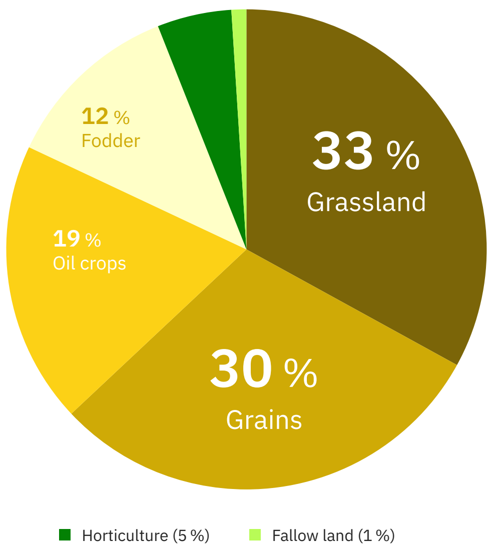

Figure 12

Organic grain production (2020 | tons)

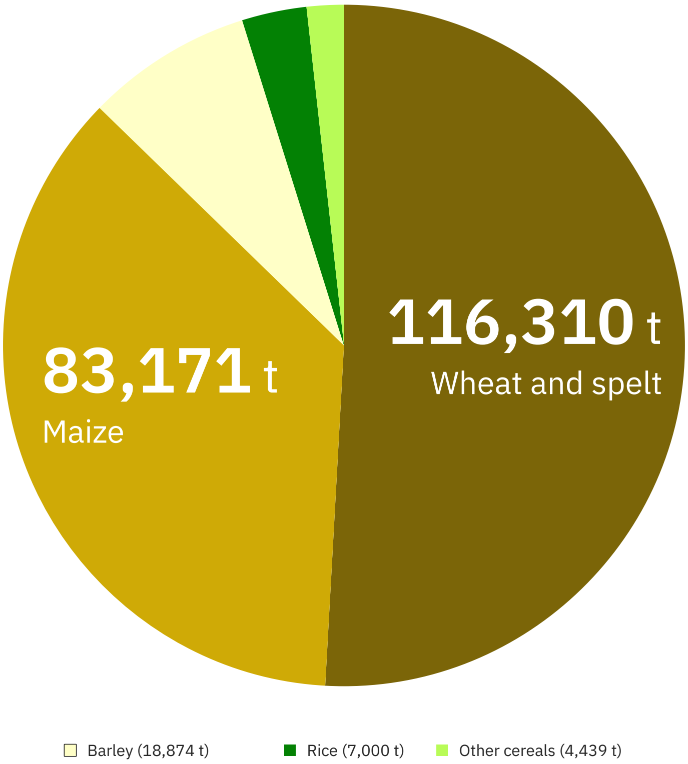

Figure 13

Many organic farms in the **Tulcea and Constanța** area are between 500 and 2000 ha such as Biofarm Crucea, Anglo-Rom Agriculture, Delta-Rom Agriculture, Kiara Laci, Agro Exim Grup as well as some of the Naturland certified farms.

One of the central companies in the organic grain sector in the South-East of Romania is **Biochem Organics** which is an offtaker for contracted farmers and trades organic grain internationally. In Tulcea county alone, the company works with farmers who grow organic crops on over 70,000 ha. Biochem also offers storage services for organic grains. A similar role play Delta Organic Crops and Agri Mondo partnering with farmers who have 5,000 ha of land certified organic.

Other organic grain traders are **Copeland Crop** in the West of the country near the Hungarian border and **AgranoLand** in the Moldavian region (Vrancea county). The latter is also a primary processor making organic flour, organic vegetable oil and animal feed from organic grain and oil seeds. Other important primary processors are **Maragro Group** in Banat and **LTA Mondial** in Constanța producing organic sunflower and rapeseed oil. Altogether, there are 5 major companies processing organic oil seeds. About 90 % of organic grains, oilseeds and vegetable oil as well as oilseed cake for feed purposes are sold in bulk to partners in other EU countries.

As an effect of Russia's attack of Ukraine when Ukrainian organic traders were unable to export organic crops, Romanian producers first benefitted of price increases for organic grains and oilseeds. However, from mid-2022 prices plummeted, as organic grains started to be exported via Romania and "flooded the market" as traders say. With risings energy costs then, and consequently increasing prices for conventional raw materials, the difference between conventional and organic prices became marginal.

Info

Biochem Organics

www.biochemorganics.ro

Delta Organic Crops

www.delta-organic-crops.eu

Agri Mondo

www.agrimondo.ro

Copeland Crop

www.copelandcrop.ro

AgranoLand

www.agranoland.ro

Maragro Group

www.maragrogroup.com

LTA Mondial

www.ltamondial.eu

A food manufacturer processing grains in Transylvania is the Demeter-certified company **Petras Bio** producing pasta from sprouted seeds as well as flakes, mueslis and cookies. From Transylvania is also **Ecomania** making organic biscuits. The organic farm **Terra Natura** founded by two Swiss brothers in the Banat produces retail packed organic flour just as also **Biofarm Manufactura**. Avraham Marian Cioceanu, who is also involved in the association **Bio Romania**, uses the brand **Dr. Avraham** for organic flour and **In Veritas Bio** for organic bakery products. Under the brand name **Bio Românesc** which belongs to Bio Romania, companies like **Altstel RO** market locally made pasta.

Organic sunflower oil for the domestic market is locally available under the brands of **Izabell** and **Bioforia**. Izabell belongs to the oil mill LTA Mondial while Bioforia is the brand of an organic agriculture cooperative from Transylvania with more than 2,400 ha of organic land (**Silvania Organic Farms**).

Figure 14: Organic sunflower oil, by Bioforia

Horticulture

Organic horticulture in Romania has a slow upward trend after two decades of stagnation. From a total of 24,298 ha, it is made up of 8,606 ha of fruit orchards, 5,409 ha of nut orchards, 2,509 ha of vineyards, 2,299 ha of berry plantations, 1,229 ha of fields for medicinal and aromatic plants (MAPs) and 830 ha of vegetables production.

With an area of **organic fruits** grown on 8,606 ha, Romania is on 6th position in Europe according to FiBL's Survey 2022. The difference between Europe's top runners and Romania is that fruits produced in Italy, France, Poland, Germany and Spain appear on international markets while Romania's fruits are hardly traded. Looking at apples (about 3,600 ha), calculated yields according to Eurostat are only 6.8 t / ha (should be at least 20 t / ha). This supports two observations: i) Some of the orchards have not been established to be harvested, but just to obtain the subsidies linked with orchard establishment or maintenance; and ii) Since marketing channels have not been developed, the Lion's share of the fruit yield is marketed as conventional where sales are well organised. Supermarket store checks by the authors in Bucharest, Cluj and Brașov confirmed that 100 % of organic apples in chain supermarkets were from Northern Italy. The same is true for organic plums (also about 3,600 ha): Much is sold through conventional channels.

Info

Petras Bio

www.petrasbio.eu

Ecomania

www.ecobiscuiti.ro

Terra Natura

www.terranatura.ro

Biofarmland Manufactura

www.biofarmland.ro

Izabell

www.izabell.ro

Bioforia

www.bioforia.ro

Much of the **8,606** ha are extensive orchards in mountainous pastures. Two thirds of commercial organic apple orchards are more than **25** years old and on generative rootstock. If harvested, the apples go for industrial processing. The size of super-intensive apple orchards is estimated at only **100–150** ha. For the rest of the orchards' production goes in larger quantities to processing in big factories mostly in Hungary (**Austria Juice** or **Rauch**) which financed after **2005** the planting of about **1,000** ha of apple orchards of disease resistant varieties destined for processing.

Figure 15: Organic super-intensive apple orchard in Transylvania, by A. Lozan

Sandy Fruits is an important consolidator for this trade. In addition, there is also artisanal processing inside the country for the local market. **Ferma Biozoli**, **Măr de Bran**, **Merita Bio**, **Provivo** and **Coșul Cu Fructe** are some good examples for this business. Processed apples and plums are made into juice, baby food and spirits. Producers with advanced orchards for the fresh market are **Sinfrutta**, **Ferma Cenad**, **Ferma Steluța** and **Agromec Cheresig**. If they manage to sell their fruits to large supermarkets they may not always be identified as organic.

With about 5,000 ha, Romania is one of the most important **organic walnut** producers in the EU, and organic walnuts are one of the **focal crops** for the Romanian government. The organic nut sector is well organised and has consolidators with processing units, often in parallel with conventional business. Organic nut production is mostly made up of extensive walnut orchards located mostly in the Transylvanian hills with low yields and trees older than 25 years. In addition, there are smaller scale hazelnut orchards with production mostly going to Ferrero in Italy as conventional. Some of the biggest players in this subsector are **Sinfrutta** with over a 100 ha of organic hazelnut production and **Solitree** with 60 ha. **Transilvania Nuts**, **Dry Fruits Transilvania** and **NutSan** are some of the most important consolidators and processors of organic walnuts to final retail packing. Transilvania Nuts, a company with an own stand at Biofach 2022, also produces mixes and bars with dried fruits and nuts. Dry Fruits Transilvania has own stalls in several supermarket chains with walnuts, hazelnuts and dried apples.

Info

Austria Juice
www.austriajuice.com

Rauch
www.rauch.cc/hu

Sandy Fruits
www.sandyfruits.ro

Ferma Biozoli
facebook

Măr de Bran
www.mardebran.ro

Merita Bio
www.meritabio.ro

Provivo
www.provivo.ro

Coșul Cu Fructe
facebook

Sinfrutta
www.sinfrutta.com

Ferma Steluța
www.fermasteluta.ro

Agromec Cheresig
www.meritabio.business.site

Transilvania Nuts
www.transilvanianuts.ro

Dry Fruits Transilvania
www.dryfruitstransilvania.ro

NutSan
www.nutsan.eu

For **organic vegetables**, Romania is only at Rank 20 in Europe. Romanian organic farmers can hardly compete with Italian and French organic vegetable producers. Despite this, some interesting developments took place during the last 5 years in the context of local organic market expansion and programs of retailers to promote local produce. During the season, local organic tomatoes – the Number One organic vegetable crop – become more and more available for local consumption. **Roua Coop** is one of the few successful cooperatives that makes available larger and stable quantities for retailers. It cooperates with Lidl, Kaufland and Carrefour such as also **Fermierul Moroșan, Goatsheaven, Grup Prod Corvinia, Hortifruct** (all organic greenhouse vegetables), **Romtransilvan Logistic** (organic mushrooms) and **Elixir Bio** (organic berries). Other organic vegetable farms worth mentioning are **Bio Culture**, **Biofresh Banat**, **Oscar Management**, **Gradinile Bio Rosenthal**, **Grădina Letca**, **BioDumbrava**, and **Ferma Bio**, the six last just outside of Bucharest. Vegetable farmers produce nearly exclusively for the local market with very little trade inside the EU.

Organic berries are the other **focal crop** for organic sector development in Romania. The subsector is dominated by sea buckthorn, blueberries, blackberries and raspberries. Even though quantities are smaller than what is harvested from wild collection, qualities are higher and they therefore rather target the fresh market. Berries are predominantly sold frozen to other EU countries for further processing, but small quantities are started to be sold for the fresh market, too (e.g. blueberries to Germany). Some companies are supplying the local market with finished processed or seasonal fresh berries. **Biocatina** is a fully organic cooperative processing berries from an area of over 200 ha. They created a brand called **Energyne** with a great range finished products. Other important companies from this sector are: **Merryberry** (fresh and processed blueberries), **Primagra** (frozen sea buckthorn), **Hipy** (sea buckthorn juice), **Racovița Berivoi** (fresh and processed blueberries, raspberries and blackberries). Smaller farms are Elixir Bio in the Wallachian Plain and Bluerey in Transylvania.

Despite great competition with Bulgaria, organic lavender production is growing fast in Romania. In addition, herbs such as sage, fennel, coriander and peppermint are grown on smaller areas. Along with the production of MAPs, companies have emerged which produce essential oils, teas and cosmetic products. They are mentioned in the Chapter on wild collection as they usually process both cultivated and wild herbs. **Grădina de Lavandă** in Wallachian Plain and **Bio Lavanda** in Transylvania are specialised in lavender only and do both cultivation and manufacturing of final lavender products.

Organic vegetables

Roua Coop
www.rouaorganic.ro

Fermierul Moroșan
www.fermierulmorosan.ro

Grup Prod Corvinia
www.grupcorvinia.ro

Hortifruct
www.hortifruct.ro

Romtransilvan Logistic
www.gradinapadurii.ro

Bio Culture
facebook

Biofresh Banat
www.biofreshbanat.ro

Gradinile Bio Rosenthal
facebook

Grădina Letca
www.letca.ro

BioDumbrava
www.biodumbrava.ro

Organic berries

Biocatina
www.biocatina.com

Energyne
www.energyne.eu

Merryberry
www.merryberry.ro

Primagra
www.catinadearad.ro

Hipy
www.hipy.ro

Racovița Berivoi
www.transylvania-berry.ro

Medicinal and Aromatic Plants

Grădina de Lavandă
www.gradinadelavanda.ro

Bio Lavanda
www.biolavanda.ro

A company processing cultivated hemp is **Canah** which produces oil, fruit bars and other hemp products.

Wild Collection

Many of the companies processing and trading fruits, nuts, berries and MAPs, work both with produce from cultivation and wild collection the latter having still a much more significant role in Romania. Of Europe's nearly 10 million ha of wild collection area, Romania has 1.8 million ha and lies at Rank 2 after Finland (4.6 million ha), before Belarus, Albania, Kosovo, North Macedonia and Ukraine. Wild collection is mostly carried out by rural families in the Carpathian Mountains who deliver their gatherings to consolidators for primary processing (berries and fruits are sold frozen while herbs are dried). These consolidators which have agreements with local forestry departments then deliver their produce to trading companies or trade to the other EU states' market.

Products of wild collection are:

- Berries (and their leaves): Blackberries, blackcurrant, blueberries, cranberries, elderberries, hawthorn, raspberries, sea buckthorn, sloes
- Fruits: Wild apples (over 170,000 ha of Malus sylvestris and Malus domestica), bird cherries, cornelian cherries, walnuts, pine fruits, wild pears, rose hips
- Herbs: Arnica, celandine, chamomile, coltsfoot, comfrey, dandelion, hop, mint, mistletoe, oregano, St. John's wort, stinging nettle, tansy, thyme, yarrow
- Mushrooms: Porcini, chanterelles and Caesar's mushrooms

There are many traders of berries, fruits, herbs and mushrooms of wild collection. However, only a minority hold an organic certificate for all or part of their products. Among them are **Biorom**, **Ecofruct**, **Regiu Plant** and **Sandyfruits**.

Buyers are the large European herbs processors such as Martin Bauer, Kräutermix, Worlée, Teekanne and Sonnentor. With raw material from its mother company, **Sonnentor** Romania has started in Transylvania in 2022 to manufacture retail packed organic herbal teas for the Romanian market.

There is also a multitude of small companies processing wild and cultivated MAPs often using artisanal methods only. They mainly produce for the local market which reflects the willingness of the Romanian female consumer to pay for natural cosmetics and food supplements.

Hofigal from Bucharest is producing organic herbal tea and herbal food supplements with raw materials from Romanian cultivation or wild collection. The company was founded in 1990 and produces now over 400 different products, some patented.

Kalpo from Bucharest processes organic herbs into teas under the company's brands of Vedda and RuBio. MAPs are also traded in bulk.

Figure 16: Products of wild collection at Biofach, by A. Lozan

Info

Biorom

www.biorom.eu

Ecofruct

www.eco-fruct.ro

Regiu Plant

www.regiuplant.ro

Sandyfruits

www.sandyfruits.ro

Hofigal

www.hofigal.eu

Kalpo

www.vedda.ro

Panait INTL from Timișoara exclusively uses organic raw materials grown in Romania. The company started in 2010 with lavender production and then went into cosmetic production. Products are based on lavender, different herbs and rose hips. Douglas Romania is among the retailers.

Wild Carpathia Organics from Timișoara produces essential oils, cold pressed oils and other cosmetic ingredients from organic certified raw materials of the area. Finished products include oils from lavender, fennel, coriander, sage, lemon balm and rose petals.

Ecoland Production located in the Moldavian region is another company making essential oils, creams, ointments and soaps from herbs from local wild collection and own cultivation.

Wine

In Europe, Romania is not very prominent if it comes to organic wines. It only occupies 9th position for the production of organic grapes. In 2020, only 1.4% of vineyards in Romania were organic certified (just over 2,500 ha). However, there is some recent upward trend as also conventional wine production is growing. The most active companies with brands of organic bottled wines are **Domeniul Bogdan**, **Vifrana**, **Domeniile Franco-Române**, **Terra Natura**, **Crama Delta Dunarii** and **Weingut Edgar Brutler**. Domeniul Bogdan produces wine grapes in a 113 ha Demeter-certified vineyard in Dobruja.

Figure 17: Organic Romanian wine, by Domeniul Bogdan

Figure 18: Organic Romanian yoghurt, by Napolact

Animal Production: Dairy, Honey

Organic certified animal production is mainly about dairy and honey. While organic dairy production from cows is relatively stable, sheep and goat production has been reducing in recent years, while organic honey and poultry production continues to grow. A major reason for this is the established cooperation structure in the value chain (production, consolidation, processing, trade) for honey and cow milk which is lacking for the other products.

Despite the large size of organic grassland of 155,000 ha, only 20,000 cows (and 13,000 sheep) are registered. Much of the organic grassland seems to have only been certified so that farmers can cash in the organic subsidies. On the other hand, there is a significant demand on the local market for organic dairy products, and supply chains are well organised with Romania's largest dairy companies, which are mostly foreign owned, having separate organic processing lines.

The 4 largest dairy companies in Romania are **i**) the **French Lactalis Group** (**Albalact**, **Covalact**, Raraul, **Lactate Harghita** and **LaDorna**), **ii**) the **Greek Olympus** (**Fabrica de Lapte Brașov**), **iii**) the **German Hochland** and **iv**) the **Netherlands Friesland Campina** (**Napolact**). Of them, 3 are actively producing organic products made from Romanian organic milk. Only Hochland Romania is selling organic cheese products in Romania made in Germany.

Info

Panait INTL
www.mayieskincare.com

Wild Carpathia Organics
www.wildcarpathiaorganics.com

Ecoland Production
www.ecoland-production.ro

Domeniul Bogdan
www.domeniulbogdan.ro

Vifrana
www.vifrana.com

Domeniile Franco-Române
www.dfr-wines.com

Terra Natura
www.terranatura.ro

Crama Delta Dunarii
www.lasapata.com

Development of organic animal production in Romania (number | tons | % | 2020)

Livestock	Number in 2020	Production in 2020	Development of number of animals or beehives since 2016
Beehives	170,789	4,480 t of honey	+98 %
Poultry	171,391	30,755 thousand eggs	+171 %
Bovine animals	19,870	35,775 t of milk	-1,1 %
Sheep	13,189	247 t of milk	-80 %
Goats	830	86 t of milk	-68 %
Other animals	1,530		-59 %
Fish		975 t of production	-84 %

Figure 19

The most visible on the market is **Napolact** (Friesland Campina) which started organic milk processing in 2015 sourcing organic milk from dairy farms in Transylvania.

Lactalis offers organic milk under its brands **Zuzu Bio** and **LaDorna Bio**, also sourced from organic farms in Transylvania near Sibiu. Lactalis' **BIO Covalact** produces organic milk and yoghurt from organic farms in Transylvania near Brașov. **Albalact** also makes organic products for Lidl's private label.

The Greek **Olympus** company produces the whole range of organic milk products from organic farms near Brașov.

Organic dairy products from Delaco (French **Savencia Group**) and Hochland (Germany) are, however, not produced in Romania. They come from EU countries and are just distributed in Romania.

A smaller Romanian dairy company is **Eurolact** in Bucharest which under its brand Colectar Bio makes organic dairy products made from cow farms in the South of the country. They are at sale in all major supermarkets. The Romanian company **Carmo-Lact Prod** from Monor in Northern Transylvania is producing organic dairy products sold under its own brand Monor Bio and under the private label of Carrefour. The organic agriculture cooperative Silvania Organic Farms from Transylvania, which we mentioned earlier in the section on organic sunflower oil, is also processing the milk of members und selling the production under the Bioforia brand.

A small processor of milk from small ruminants is **ASI Nature** processing organic milk from cows, sheep and goats from the Hârtibaci Valley near Sibiu. ASI Nature belongs to the Swiss ASI Nature Holding which holds shares in several German organic trading companies. ASI Nature owns the Harbach brand for different organic cheese products which have also been exported to other EU countries and the US.

Info

Napolact

www.napolact.ro/bio-pe-bune

Zuzu Bio

www.albalact.ro/en/brands

LaDorna Bio

www.ladorna.ro

BIO Covalact

www.covalact.ro

Olympus

www.olympusfoods.ro/produse

Eurolact

www.eurolact.ro

Carmo-Lact Prod

www.monor.ro

Silvania Organic Farms

www.bioforia.ro

ASI Nature

www.asinature.ro

An organic speciality product from Orăștie (West of Sibiu) should not go unmentioned. Here, the company **Asinia Lact** produces organic milk from its 500 donkeys on 300 ha of free range. The milk is sold only in pharmacies and VitaMIX health food stores throughout the country.

With over 170,000 organic certified beehives, Romania is third in Europe for organic **honey** production. Only Bulgaria and Italy produce more honey (FiBL survey 2022). Romania is very suitable for honey production due to its large areas of mountain forests and sizeable sunflower fields in Banat.

The value chain is often organised by processors who buy organic honey from farmers whom they may also supply with necessary inputs. Others manage more than 300 hives and are big enough to process and market their own honey.

Some of the processors in the different regions of Romania are:

- Apiprodex (Transylvania);
  Brand: **Nectarul Carpatilor** (↳)
- Apisrom (Moldavian region);
  Different brands (↳)
- Apisvet Miroslava (Moldavian region);
  Brand: **Apisvet Elite** (↳)
- Apidela Distribution (Dobruja);
  Brand: **Fagurele Auriu** (↳)

The doyen among the organic beekeepers is the **Pasca** family from Bistrița-Năsăud in Transylvania who has been certified organic since 2003. A unique organic beekeeper is **Wilhelm Tartler**, a German who returned to Transylvania and produces honey from 300 organic certified bee hives. A company specialised in the processing and trade of organic pollen is **Polen Dis** from Transylvania.

Organic poultry production has been growing strongly recently. This reflects not only a strong demand for organic **eggs**, but also the possibility for smaller farms to start organic production with little investment and a good cash flow.

Three types of organic egg producers shall be presented here:

- **Toneli Holding** (Brand: Familia Toneli) from Bucharest was producing eggs with the codes 1 (free range), 2 (barn system) and 3 (cage system). The company has just added organic production (code 0) to its ongoing operation.
- A different example is **Ouă de Țară** from near Pitești, a company producing only organic eggs, but on a large scale (50,000 hens on 20 ha of pasture).
- A number of mixed family farms is also producing organic eggs such as **La Ferma SIA** in the Wallachian region.

Info

Asinia Lact

www.asiniafarm.com

Pasca

www.mierebio.eu

Wilhelm Tartler

www.miereecologica.ro

Polen Dis

www.polendis.ro

Toneli Holding

www.toneli.ro

Ouă de Țară

www.ouaecologice.ro

La Ferma SIA

www.lafermasia.ro

Organic Domestic Market

The Romanian organic retail sales are estimated at just under 100 million EUR (up from 41 million EUR in 2016) which is still one of the lowest in Europe on a per capita basis. However, the organic domestic market is increasing every year, mainly in major towns where the economy is developing fast with well-paid jobs in IT, services and manufacturing.

Romanians that worked in Western countries consume a higher share of food from organic production. The social category consuming most organic food is young families with children (although they do not always have the highest income). Modern Buyer and iQarConsult conducted a survey in 2021 on the Romanian market of organic fruits and vegetables from which conclusions can be drawn for other organic subsectors as well. According to the study, two-thirds of population buy organic fruits and vegetables once to three times a week and 10 % buy every day organic. 85 % of respondents buy organic in retail chains, 45 % visit open food markets, 20 % go to specialised shops, 12 % buy online and just 8 % purchase directly from farmers. For retail chains, **Lidl** is the leading place of purchasing organic food (68 %), followed by **Kaufland** (59 %), **Carrefour** (55 %) and **Auchan** (28 %). They have a wide diversity of organic products: Fresh produce, dry assortment, baby-food and cosmetics. Branches are spread throughout the country and most of them have the option of online purchase and delivery. Markets located inside malls usually have a wider variety of organic products.

It is estimated that still about 90 % of articles are imported mostly from the other EU countries depending on the headquarter of the retailers. However, local organic products even though still in small quantities are growing consistently every year: Dairy products, breakfast cereals, pasta, honey, nuts, wine, seasonal fresh fruits and vegetables as well as juice from fruits and berries.

Checks in the biggest stores of the most important retailers in 2022 showed that the biggest range of organic articles is found at Cora and Kaufland (about 700), followed by Mega Image and Selgros (about 550), Auchan and Carrefour (both more than 400 articles).

Since 2019, Carrefour in cooperation with EcoCert has a programme called “Creștem România Bio” (“We grow Romania organically”). It supports producers of fresh fruit and vegetables. The retailer covers the costs of first-time certification, provides a secured market during conversion and two years after and offers advice with regards to accessing subsidies. After being required by law (321 / 2009) to acquire 51 % of the meat, eggs, fruits, vegetables, honey, dairy and

Most important retailers in Romania with range of organic products

Chain	Outlets	Store types*	Turnover (bn. EUR, 2021)	Number of organic articles	Own organic brand
Lidl	340	S	3.0	200	
Kaufland	141	S	2.9	700	K-bio
Profi	1,662	C, S	1.9	>50	
Carrefour	349	S, H	1.9	>400	
Mega Image	911	C, S	1.5	550	Delhaize bio
Metro	769	S	1.5	>100	
Auchan	112	S, H	1.3	470	Auchan bio
Penny	303	S	1.1	>150	my BIO
Selgros	23	H	0.8	530	
cora	11	H	0.3	720	Nature Bio
dm	116	S	0.1	400	dm Bio

Figure 20

*H: Hypermarkets, S: Supermarkets, C: "City"-type small supermarkets

bakery products from direct partnerships with farmers, especially Carrefour got heavily involved in cooperating with organic producers.

Figure 21: Organic shelves in Carrefour, by A. Lozan

For online sales, especially Carrefour and Kaufland are popular. Important also is eMAG.ro which is the biggest e-commerce platform in the country. There are also specialised online traders for organic food selling a very large range of products: biogama.ro, biomania.ro, naturaliabio.ro, obio.ro, rapunzel.ro, smartorganic.ro, suntbio.ro. Some of them (e.g. Obio) do own retail packing and sell under own brands. In addition, there are those that focus on health food trading both, organic and conventional articles: biobunatati.ro, biolandia.ro, biosano.ro, biosimttera.ro, bioveg.ro, bucuria-naturii.ro, froopt.ro, organicbio.ro, republicabio.ro, sanovita.ro, vegis.ro, vianaturalia.ro.

Specialised organic shops are developed only in larger towns. Partly they are run by organic farms that sell their products and also offer goods from import or other local producers. In general, specialised trade can be classified into two categories: a) Retailers focusing on local, artisanal production, much of which is not coming with an organic certificate; and b) Retailers that restrict their assortment to certified products with usually more than 70 % of imports. Specialised shops are in most cases responding to health concerns, their assortment therefore usually contains gluten-free and vegan food and products suitable for consumers with diabetics and allergies. Some networks of organic specialised shops have recently developed which are spread throughout the country: Esenta Plant with more than 10 stores focusing on natural cosmetics and pharmaceutical products; Naturalia Bio with shops in Bucharest including 2 organic cafes; Paradisul Verde with 6 stores of which 4 in Brașov, as well as Remedia Vert with 7 stores.

Organic Imports and Exports

Longstanding organic trade relations have been built up with Germany and other EU countries. The most important trade relations with non-EU countries exist with Turkey for imports and the US for exports.

85 % of all imported non-EU organic produce comes from Turkey (mostly organic sunflower and rape seeds, TRACES data for 2021). Organic raw materials from Turkey, Moldova and Ukraine are mostly pre-processed in Romania and then sold to other EU-countries. Organic exports to non-EU countries are usually about 4 times higher than imports with the US being the primary destination. With regards to other EU-countries, Romanian companies mainly buy ready food and cosmetic products (mostly from Italy, Germany, France and Spain). In return, organic raw materials (grains, oilseeds and oilseed cake) are still sold in large quantities, mostly Germany which, for example, receives 17,000 t of organic sunflower seeds per year (AMI, 2022).

There are a number of companies which import organic products and distribute them to the Romanian retail networks such as **Biologistic**, **Pronat** and **MORE Bio Commerce**. Some of them import in bulk and repackage the products in Romania (e.g. Biologistic with their BIO allgreen brand, **Niavis** and MORE Bio Commerce with different brands).

Export promotion is done by having a country stand at international fairs such as Biofach. Bio Romania was made responsible for Romania’s stand at Biofach. The range of products exhibited usually include grains, berries, mushrooms and herbs from wild collection as well as honey.

Info

Biologistic

www.biologistic.ro

Pronat

www.pronat.ro

MORE Bio Commerce

www.more-group.eu/comert

Niavis

www.niavis.ro

Companies exhibiting at Biofach 2022

Company	Product
Apiprodex	Honey, honeydew, propolis, pollen
BHS Bio Innovation	Organic fertilizers and plant protection products
Biochem Organics	Grains, oil seeds, seeding material, inputs
Ecofruct	Wild collection products: Berries, fruits, nuts, mushrooms, MAPs, NFC juice
Fuente de la Salud Vasmar	Honey and pollen
Kalpo	Herbal, black, green tea, coffee, syrup, vegetal oils
LTA Mondial	Sunflower and rape oil, grains
Manor Impex	Spelt wheat and flour, cereals, pasta
Primagra	Sea buckthorn planting material and frozen fruits
Regiu Plant	Wild collection products: Berries, MAPs, mushrooms, walnuts, sea buckthorn oil
Transilvania Nuts	Walnuts, snacks and mixes of nuts and fruits
VIC Future Development	Pretzels

Figure 22

Outlook

A substantial food retail market which is the fastest growing in the EU is an important argument for concentrating all efforts on further developing domestic trade.

Figure 23: Organic fruit products, by Biozoli

The development of the organic sector in Romania has not been straightforward. Some producers, processors, associations and control bodies which accompanied organic sector development from the onset have vanished. This led to some discouragement and widespread lamenting. However, the outlook for more organic agriculture, food manufacturing and retailing seems to be actually quite positive in line with Romania's economic strength. Romania is the country with the largest population in South-Eastern Europe and the biggest market. In no other EU country has the retail market volume grown more than in Romania (according to Eurostat, it has been 50 % higher in 2021 compared to 2015). The food retail market has a size of more than 40 billion EUR, and further growth is expected for 2023.

This provides opportunities for producers, processors, logistics, retailers and HoReCa calling for more effort to satisfy local consumer demand for quality food and replace imported food products – even more though as it seems difficult to sell finished Romanian organic food products outside of the country.

Sources

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4. Cioceanu, Avraham Marian: BioRomânia (www.asociatia.bio)
5. Coman, Mihail: Research Institute for Fruit Growing Pitești (www.icdp.ro)
6. Damian, Constantin: Agromec Gheresig (www.meritabio.ro)
7. Deac, Alex: Sandyfruits (www.sandyfruits.ro)
8. Dogar, Dorin: Ecofruct (www.ecofruct.eu)
9. Grigoraș, Mihai: Ecomarket Transilvania (www.ecomarket.ro)
10. Halder, Kurt: OGV Nordbaden EG (www.oga-bruchsal.de)
11. Ionescu, Radu: Regiu Plant (www.regiuplant.ro)
12. Mansour, Wissam: Solitree (wissam@solitree.ro)
13. Marton, Dan: Pro Mihai Eminescu Trust (www.livadamalancrav.ro)
14. Mitre, Dan: Ferma Steluta (www.fermasteluta.ro)
15. Pelei, Elena: Livamer Fruct (merehomorod@gmail.com)
16. Persinaru, Marius: Mar de Bran (www.mardebran.ro)
17. Petrache, Sorin Laurențiu: Bayer (www.bayercropscience.ro)
18. Pop, Ioan: Provivo (provivo_sm@yahoo.com)
19. Rogoz, Claudiu: Ital Agroturism Maluda (info@rivierasrl.it)
20. Silinescu, Bogdan: Ferma Cenad (bogdan.silinescu@fermacenad.ro)
21. Toncea, Ion: Romanian Association for Sustainable Agriculture (www.agriculturadurabila.ro)
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Evergreen Estates: evergreenbiocrops.ro

Modern Buyer: modernbuyer.ro

Optim Agro: optimagrototal.ro

Universities:

Bucharest Agricultural Faculty: usamv.ro

Cluj-Napoca Agricultural Faculty: usamvcluj.ro

Iași Agricultural Faculty: uaiasi.ro

Timișoara Agricultural Faculty: usab-tm.ro

Ovidius University of Constanța: univ-ovidius.ro

Transylvania University of Brașov: unitbv.ro

Sapientia Hungarian University of Transylvania in Târgu-Mureș: ms.sapientia.ro

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MADR (www.madr.ro) and OFIS (https://ec.europa.eu/agriculture/ofis_public/index.cfm)

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