



Romanian Chemical and Organic Fertilisers Market

A FRD Center Market Entry Services
analysis





Introduction

This free “demo” analysis is produced by **FRD Center – www.frdcenter.ro** - one of the pioneer privately owned independent ***market entry consulting and M&A advisory firms*** in Romania as a **promotional sample-report**.

Since 2000, FRD Center offers tailor-made market research and intelligence, B2B matchmaking and M&A consulting services to foreign organisations interested to enter Romania and the emerging markets in Europe as exporters, consultants, investors or joint-ventures, to relocate their operations, or to source in CE, SE and Eastern Europe.

Disclaimer:

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As part of the CSR activity, FRD Center endorses the
Sibiu International Theatre Festival FITS (SibFest) - www.sibfest.ro

The Sibiu International Theatre Festival is the most complex festival in Romania. Internationally, it has become the most important performing arts festival in Europe, judging by its ampleness, dimension, and quality of events, before Edinburgh International Festival (Great Britain) and Avignon Festival (France)



Romanian Agriculture

Romania has an agricultural capacity of approximately 14.7 million hectares, of which approx. 10 mha are used as arable land. The soil is fertile and the climate is favourable for agriculture, animal husbandry, vegetable growing, fruit and horticulture.

Almost a third of the total EU agricultural land is owned by Romania: 33,5% of all EU farms. The main locally produced agriculture products in Romania are:

- grains: wheat, corn, barley, rape
- sugar beets
- sunflower seed
- potatoes
- grapes
- pork, poultry
- milk
- wool
- eggs





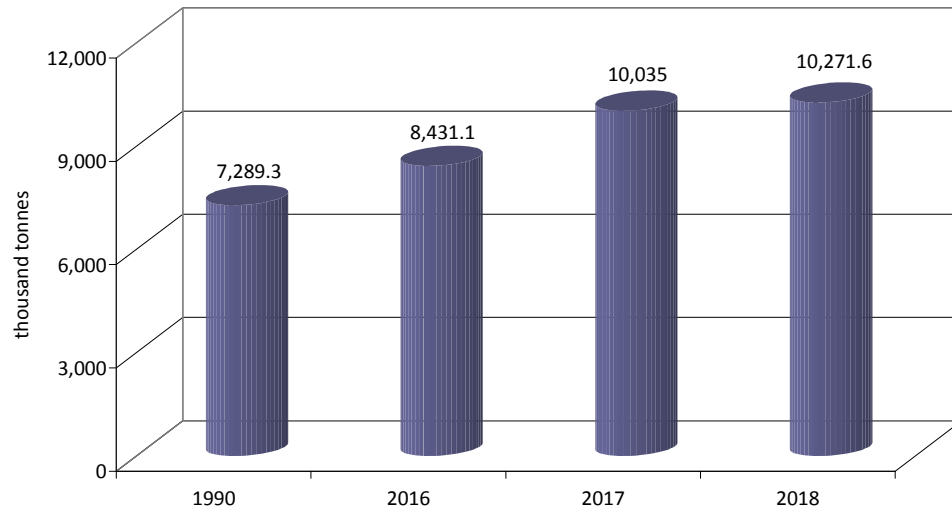
Romanian Agricultural Output 2018



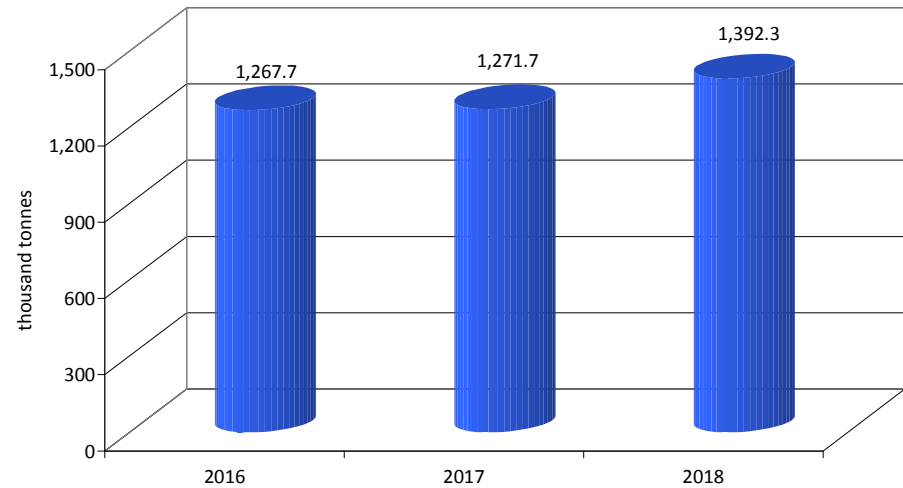
MADR data show that this year's wheat harvest exceeded 10.2 million tonnes, more than 2.3% higher than last year when it amounted to 10 million tonnes.

Also, the barley harvest amounted to 1.39 million tons, plus 9.5% over last year

Wheat production in Romania



Barley production in Romania



Romanian Agricultural Output 2017

In 2017, Romanian agricultural outputs reached nine historical records with a total of over 27 million tons of cereals. Romania registered in 2017 the largest wheat production in history: over 10 million tonnes (an average of 4,836 kg/ha.) Similarly, for rapeseed, peas, barley and sunflower.

According to the Romanian Institute of Statistics, Romania's 2017 sunflower seeds output increased by 43% to 2.91 million tonnes, the highest in the EU. In spite of the fact that, the surface of the land cultivated with cereal grains decreased by 6.9% in 2017, the production grew by 12.4% to 24.4 million tonnes compared to 2016.

Maize production in Romania went up 33% to 14.3 million tonnes in 2017 vs. 2016, while the wheat output was 17.2% higher at 9.87 million tonnes. Romanian oilseed crops production increased by 29.5% to 4.65 million tonnes.

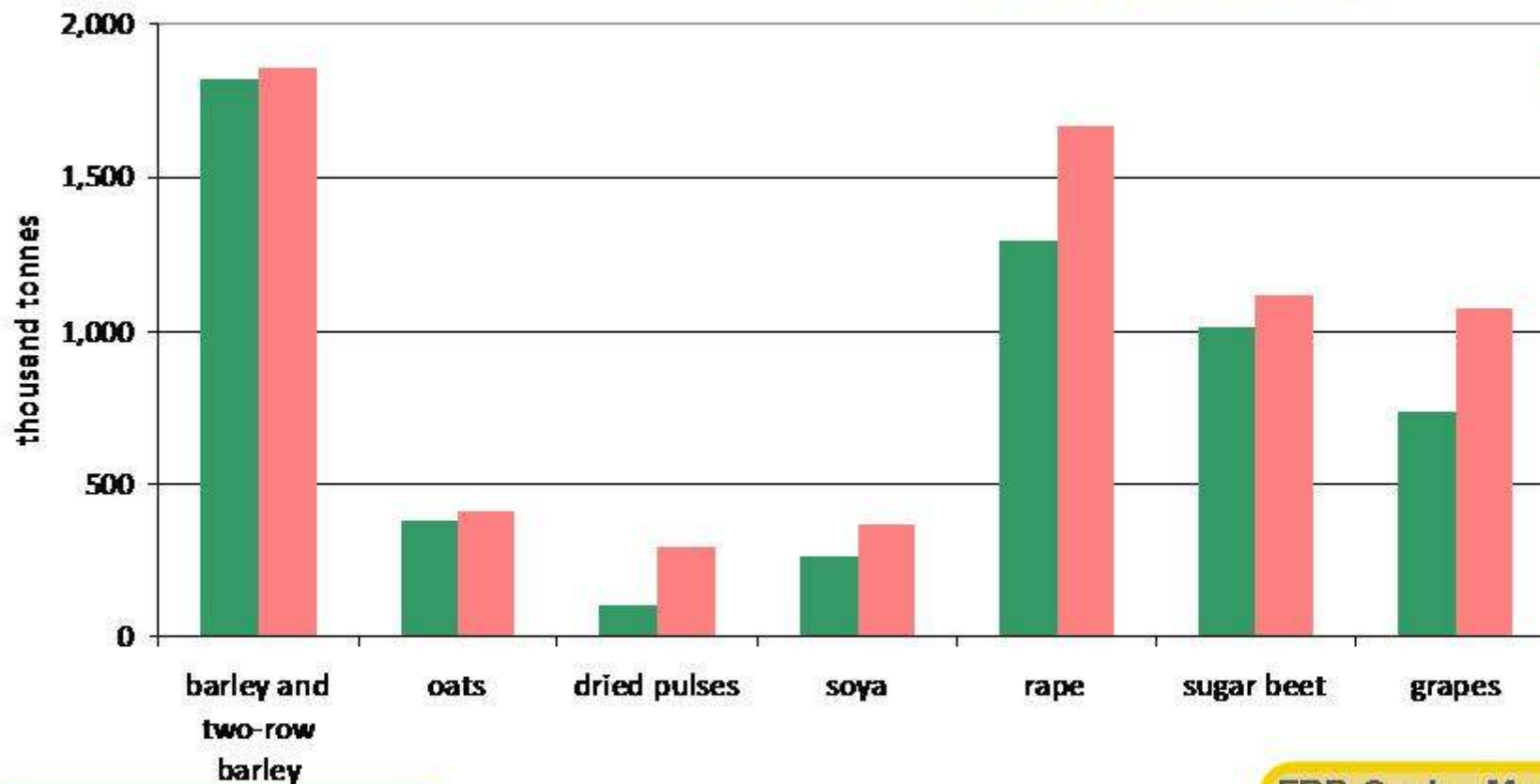
Soya beans production rose by 38.8%, while rape output rose by 29.3% to 1.67 million tonnes in 2017 vs. 2016.

More details in the FRD Center business blog posting at

<http://market-entry-romania.blogspot.ro/2018/03/romanian-agriculture-registers-record.html>

Agricultural Crop Production in Romania 2017 vs. 2016

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In 2017, Romanian agriculture obtained record crops

■ 2016 ■ 2017

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Romanian Fertilisers Market

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With one of the most important agricultural sectors in Europe, Romania is mainly an importer of Chemical and Organic Fertilisers.

The imports of fertilizers in Romania in 2017 went up +15% compared to 2016, reaching 546 mEUR, out of which 535 mEUR were imports of chemical fertilizers. In 2018, the increase of organic fertilizers imports in Romania is obvious.

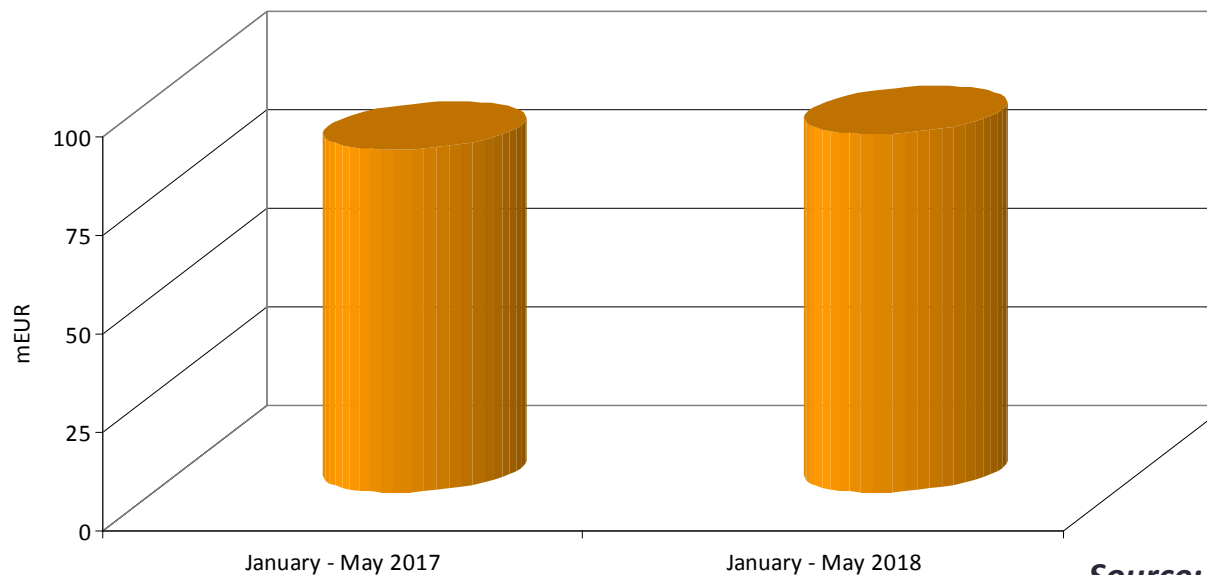
According to a FRD Center analysis based on data from Eurostat, the Romanian imports of TARIC 3101: animal or vegetable fertilisers, whether or not mixed together or chemically treated; fertilisers produced by the mixing or chemical treatment of animal or vegetable products in the first 5 months of 2018 went up by 29% compared to the first 5 months of 2017, reaching approximately 7 mEUR.



Romanian Fertilisers Market

According to a FRD Center analysis based on data from Eurostat, the imports of TARIC 3105 in Romania - Mineral or chemical fertilisers containing two or three of the fertilising elements nitrogen, phosphorus and potassium; other fertilisers; goods of this chapter in tablets or similar forms or in packages of a gross weight not exceeding 10 kg - reached approximately 91 mEUR in the first 5 months of 2018, up by 5% compared to the first 5 months of 2017.

Imports in Romania of mineral or chemical fertilisers... (TARIC 3105)



Source: Eurostat, FRD Center

Romanian Fertilisers Market – local players

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FRD Center operates a comprehensive database of local independent importer-distributors of fertilizers in Romania, as well as of international players present on the Romanian market and joint-ventures in the Agricultural Chemicals sector.

How to reach the local players at decision maker level?

How to access the Romanian Agro-Chemicals market and assess their interest in being acquired by an international player?

How to find the most relevant local importers and distributors, local buyers and dealers of Agricultural Chemicals, Agricultural Equipment and Farm Machinery in Romania and Eastern Europe?

How to learn about their storage facilities, logistic capabilities and the fertilisers trade in Romania?



Romanian Importers of Fertilisers - *examples*

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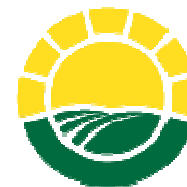
One example of reliable importer-distributor of Chemical Fertilisers and Organic Fertilizers in Romania is **Comfert**. Established in 1998, Comfert imports and distributes chemical fertilizers, acaricides, desiccants, erbicides, fungicides, insecticides etc. In 2015, it was acquired by the Irish company, Origine Enterprises.

Its range of chemical fertilizers includes: ammonium nitrate, urea, NP 20-20-0, NPK 15-15-15, DAP 18-46-0, MAP 12-52-0 etc.

Its foreign partners are: Transammonia, Timac Agro, Summit Agro, Bayer, Syngenta etc. Based in Bacau county (NE Romania), Comfert has warehouses covering the entire county. Comfert has reached a net turnover of 123 mEUR in 2017, up by 11% compared to the previous year. The company has around 250 employees.

Another example is **Naturevo**.

Set up in 1999 in Bucharest, Naturevo imports and distributes at national level inputs for agriculture: chemical and organic fertilizers, seeds and plant protection products. The company's suppliers of fertilizers are: Compo, Ag-Chem, Altinco, Omya, Timac Agro, Borealis, Ameropa, SDP France etc. Naturevo has recorded a y/y net turnover growth of 12% in 2017, reaching 24.2 mEUR. The firm has over 80 employees.



COMFERT

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Romanian Importers of Fertilisers - *examples*



Kwizda Agro Romania, part of Kwizda Agro Group Austria, imports and distributes a wide range of chemical and organic fertilizers, insecticides, herbicides, fungicides etc. Its portfolio of fertilizers includes: liquid foliar fertilizers, marine algae organic fertilizers, suspension fertilisers, complex fertilizers, microgranulated solid fertilizers. The company's suppliers of fertilizers are DeSangosse and Aglukon.

Based in Bucharest, the company has a team of 55 employees. Kwizda Agro Romania has recorded a net turnover of 37 mEUR in 2017, up by 16% compared to 2016.

Established in 2011, **Gransol Agro** is specialised in the wholesale of chemical fertilizers. Its range of products includes nitrogen fertilizers (ammonium nitrate, urea, CAN), NPK complex fertilizers, potassium chloride and ammonium sulphate.

Based in Arad county (Western Romania) with joint Romanian and Swiss capital, Gransol Agro has recorded a net turnover of 19.7 mEUR in 2017, up by almost 15% compared to 2016.



Romanian Importers of Fertilisers - *examples*

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With the HQ in Ilfov county (near Bucharest), **Agricover** is a main importer-distributor of agricultural inputs in Romania. Its range of products includes chemical fertilizers, seeds, pesticides etc. Some of its main suppliers are: Syngenta, Bayer, KWS, Euralis, Limagrain etc.

The company distributes its products in the entire country and has extensive storage and logistic facilities.

Agricover has registered a net turnover of approximately 47 mEUR in 2017. The firm has around 650 employees.

Set up in 2006 in Iasi (NE Romania), **Arvi Agro** is specialised in the storage, packaging and trade of fertilisers and the reloading of bulk cargo and packed goods. The company has the re-loading capacity of bulk fertilisers (straight re-loading) of 200,000 tonnes / year.

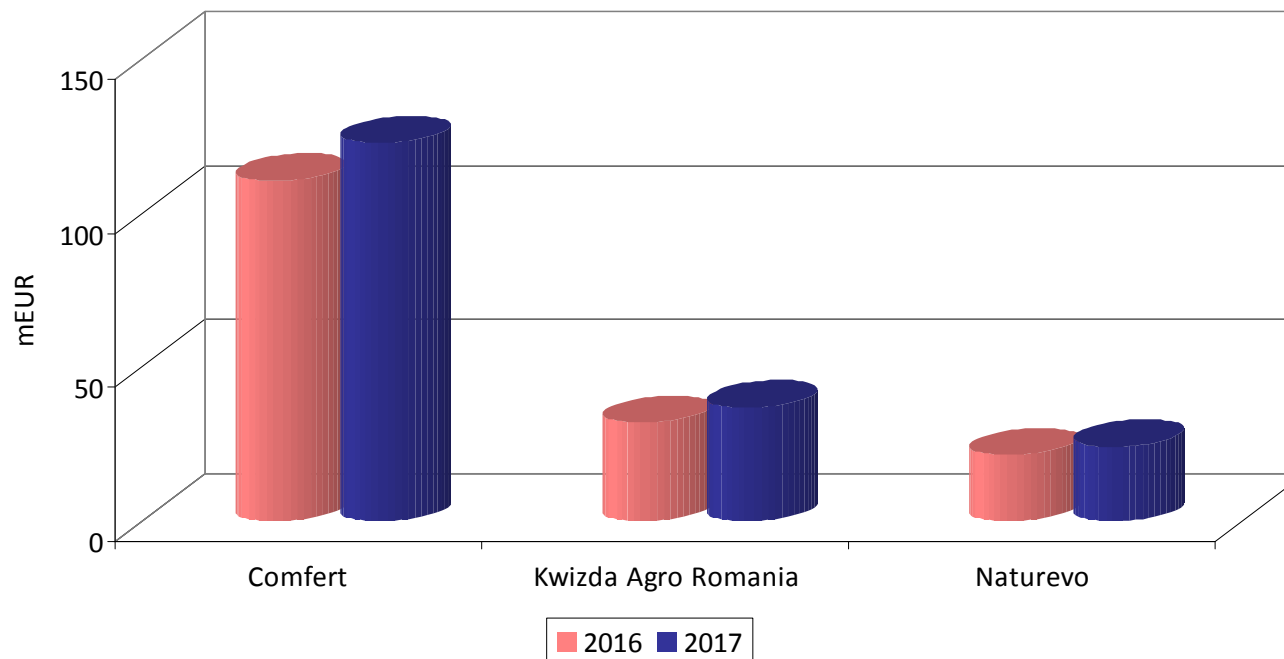
Its range of fertilizers includes: nitrogen based fertilizers, nitrogen and phosphorus based fertilizers, potassium based fertilizers, complex NPK fertilizers.

Arvi Agro has recorded a net turnover of 14.2 mEUR in 2017, up by 11% compared to the previous year. It has approximately 20 employees.

Romanian Fertilisers Market – Players analysis

According to the FRD Center analysis, the Romanian importers of fertilisers registered interesting growths in 2017. The majority of the traders have storage facilities in the Port of Constanta.

Importers of chemical fertilizers
in Romania - net turnover dynamics

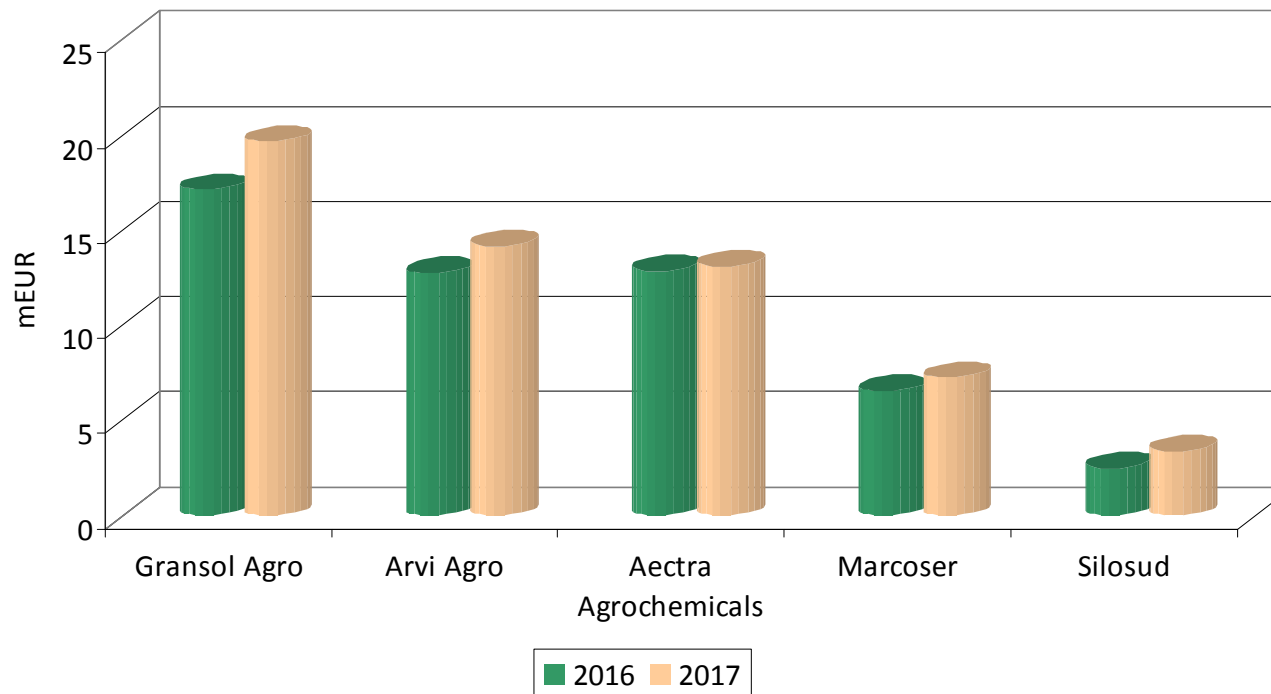


Source: FRD Center, Ministry of Finance

Romanian Fertilisers Market – Players analysis

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Importers of chemical fertilizers
in Romania - net turnover dynamics



Source: FRD Center, Ministry of Finance

Agricultural sector in Romania

FRD Center is monitoring the market opportunities on the Agrochemicals, Agricultural Machinery and Farm Equipment market in Romania and the other Emerging Markets in Easter Europe.

For over 18 years, FRD Center facilitates commercial relations between foreign manufacturers, investors, exporters with local key decision makers and provides B2B matchmaking, M&A assistance, Target Origination, Trade Missions, Inward Buyer Missions, Roundtables etc. More details at <http://www.frdcenter.ro>

In Romania, FRD Center operates with an exhaustive proprietary d-base of players in the Agricultural Sector:

- Importer-distributors and dealers of machinery, equipment, installations, feeds, chemicals etc.
- Key-decision makers in large farms and agricultural groups
- Agricultural experts, authorities



Market Entry into the Romanian Agrotechnology and Agribusiness Sector



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Entry onto the Romanian market of agro-chemicals, agricultural equipment and farm machinery can be done via **acquisition of a local player** (e.g. specialised importer-distributor or local manufacturer with own distribution network).

Also, market entry can be done through **commercial collaboration** with a well-established specialised multi-brand dealer or an importer-distributor of agricultural machinery.

For all market entry options it is recommended that a trusted local **Market Entry Adviser** should be involved. **More details at www.frdcenter.ro**

FRD Center Market Entry Services assists foreign players interested to enter the markets in CE, SE and Eastern Europe with:

- Market opportunity assessment and research
- Deal Origination
- Target Search and Selection
- B2B Matchmaking
- Background checks, In-Depth analysis of Players
- Follow-up, Pursuit of Targets
- Local support and on the ground assistance
- Trade Missions and Commercial Visits
- 1-2-1 liaison with local players and KOLs
- Support for Trade Fairs participation



For tailored Market Research, B2B Matchmaking with local players in the sector, Deal Origination and M&A assistance feel free to contact

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