Romanian Agriculture in 2019
A FRD Center Market Entry Services analysis
Introduction

This presentation 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.

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 acquire a local company, to relocate their operations, to finds new suppliers or to source in CE, SE and Eastern Europe.

Our services include:

- **Market research, investment opportunities assessment, sector studies, market briefs**


- **Product presentation and assessment of interest from clients / partners**

- **M&A assistance**: [http://www.frdcenter.ro/services/ma-advisory](http://www.frdcenter.ro/services/ma-advisory)

- **Identification of market opportunities: exports, sourcing, B2B sales etc.**

- **Trade missions**: [http://www.frdcenter.ro/services/trade-missions-trade-delegations-b2b-meetings](http://www.frdcenter.ro/services/trade-missions-trade-delegations-b2b-meetings)

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Introduction

Topics presented in this DEMO report include cereals output dynamics, imports and importers of Agricultural Machinery and Farm Machinery, Marketing and Conferences in Romanian Agriculture.

The sub-sectors detailed in this DEMO report by FRD Center (www.frdcenter) are:

- About Romania
- Romanian Agriculture
- Financial support for Romanian agriculture
- Romanian Agricultural Output
- Romanian Irrigation System
- Romanian Imports of Agricultural Machinery
- Examples of Romanian Importers of Agricultural Machinery
- The Future of Romanian Agriculture
- Market research, Marketing and Conferences in Romanian Agriculture
- Market Entry consulting and support activities

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

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

An EU member since 2007 and a NATO member since 2004, Romania is currently the one of most dynamic large markets in EU28 with a population of approx. 20 million.

After a 7% y-t-y growth in 2017, the GDP Annual Growth Rate in Romania is expected to have been of 4.1% in 2018 and to reach 4.3% advancement in 2019.

The foreign direct investment in Romania has reached 4.842 billion EUR in the first 11 months of 2018, up by 8.6% compared to the similar period of 2017.

Romania is the 2nd largest market in Central Eastern Europe. GDP grew 4.4% year-on-year in the second quarter after +5% year-on-year in Q1 2019.

In regards to consumption, household spending decelerated to 5.1% year-on-year in Q2 2019 from Q1’s 7%.

Romania’s Private Consumption Expenditure was reported at 37.921 USD bn in Jun 2019.

Growth is expected to remain healthy as a tight labour market fuels consumption, and thanks to improved private-sector and EU-led investment.
### About Romania

#### Snapshot of the Macro Environment, 2015 – 2018

<table>
<thead>
<tr>
<th>Metric</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>GDP - bn RON current prices</td>
<td>712.6</td>
<td>765.1</td>
<td>856.7</td>
<td>949.6</td>
</tr>
<tr>
<td>Real GDP growth rate %</td>
<td>3.9</td>
<td>4.8</td>
<td>7.0</td>
<td>4.5</td>
</tr>
<tr>
<td>GDP per capita in PPS - Purchasing Power Standards - EU28 = 100</td>
<td>56</td>
<td>59</td>
<td>63</td>
<td>n/a</td>
</tr>
<tr>
<td>Unemployment rate %</td>
<td>6.8</td>
<td>5.9</td>
<td>4.9</td>
<td>4.2</td>
</tr>
<tr>
<td>FDI - mEUR</td>
<td>3,035</td>
<td>4,517</td>
<td>4,586</td>
<td>n/a</td>
</tr>
<tr>
<td>HICP - inflation rate %</td>
<td>-0.4</td>
<td>-1.1</td>
<td>1.1</td>
<td>4.1</td>
</tr>
<tr>
<td>General government gross debt, % of GDP</td>
<td>37.8</td>
<td>37.3</td>
<td>35.1</td>
<td>n/a</td>
</tr>
<tr>
<td>Net external debt, % of GDP</td>
<td>27.2</td>
<td>21.7</td>
<td>20.9</td>
<td>n/a</td>
</tr>
</tbody>
</table>

*Source: Eurostat, National Institute of Statistics, National Bank of Romania, National Commission for Prognosis*
Romanian Agriculture

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

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

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Romanian Agriculture

Romania is one of the most important agricultural producers in Europe.

In 2007, when Romania joined the EU, the production of barley cereals (barley, wheat, rye and barley in autumn and spring) was of 4 million tonnes, in 2008 almost 9 million tonnes, from 2017 to 2019, every year it exceeded 12 million tons.

The Ministry of Agriculture estimate that the total grain production of 2019 will be around 30 million tonnes this year, after the 2018 record, of 31 million tonnes.

According to the National Statistics Institute, in 2018, compared to 2017, the agricultural production index was 107.2% per total, 111.5% for crop production and 97.4% for animal production.

In 2018, the crop production registered increases between 20.1% in the West and 2.3% in Bucharest-Ilfiov development regions.
Romanian Agriculture

According to the National Statistics Institute, for 2018 crop production, the highest shares were held by the development regions:

- South-Muntenia: 20.3%
- South-East: 19.1%
- North-East: 14.9%

For 2018, the Romanian animal production the highest shares were registered in the development regions:

- North-East: 18.7%
- South-Muntenia: 15.7%
- North-West: 14.7%
- Centre: 14.7%

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Financial support for Romanian agriculture

Romanian farmers benefit from financial support to develop their agricultural enterprises.

As an example, in October 2019, the Agriculture Payments and Intervention Agency (APIA) authorised payments of around 715 mEUR to over 500,000 farmers in Romania, within the Advance Payment Campaign.

In regards to animal farms, APIA started at the end of October 2019 the payment of the state aid for improving breeds of animals. The total amount authorised for payment is approximately 1.5 mRON for 28 applicants.

Regarding the implementation of the EU-funded National Program for Rural Development 2014 – 2020, between January 2017 - October 2019, the Agency for Financing Rural Investments AFIR received 42,304 applications for financing worth about 6.05 billion EUR, from which it selected 31,218 projects worth over 3.9 billion EUR.

During the same period, AFIR concluded 30,759 financing contracts worth 3.6 billion EUR and made payments of 4 billion EUR to farmers, processors, entrepreneurs and public authorities in rural areas.
Financial support for Romanian agriculture

According to the Romanian Ministry of Agriculture, the total value of the European funds that Romania has received in the first eight months of 2019 for agriculture and rural development amounts to over 2.7 billion EUR, for direct payments and investments.

The Ministry of Agriculture claims that Romania attracted from the EU 8.95 billion euros in the period 2017-2019, in funds for agriculture and rural development. Most of the money is represented by subsidies for farmers.

Agricover Credit IFN financed 3,465 farmers in Romania in the first six months of 2019, the exposure from loans exceeding 1.64 bn RON, up by 22% compared to the same period of 2018. Agricover Credit IFN is the main financial institution dedicated to financing the Romanian agriculture.

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Agriculture Market Reports by FRD Center

Since 2000, FRD Center has been assisting foreign companies, export promotion agencies and embassies from all over the world to identify market opportunities, local business partners, targets for acquisition and investment in Romania and Emerging Europe.

Some of the recent demo reports available for free download are:


Based on your specific requirements, the FRD Center can generate market and competitors analysis in Romania or other markets in Eastern Europe, CE and SE Europe.

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Romanian Agricultural Output 2019

According to preliminary data, the Romanian agricultural output of wheat, rye and triticale in 2019 reached 10,427,706 tonnes, the yield being 4,759 kg / ha, and the total area harvested at 2,191,599 hectares.

In regards to barley, an average of 4,552 kg / ha and a total production of 288,975 tonnes on 63,480 hectares were obtained this year.

Market experts estimate that Romania will retain its first place in the European Union in regards to maize and sunflower production, given that the sown areas in 2019 were larger than in 2018.

In 2019, the area sown with maize exceeds 2.65 million hectares, and the one with sunflower 1.16 million hectares, increasing compared to last year when the fields cultivated with maize occupied 2.41 million hectares, and those with sunflower 1,01 million hectares.

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Romanian Agricultural Output 2018

In 2018, the Romanian agricultural sector recorded its best results in history, with record yields for wheat, maize and sunflower.

The total grain harvest in 2018 was over 31 million tons. This ranks Romania on the third place in the European Union, after France and Germany, in cereal production.

For the second year in a row, Romania was the EU champion at maize output, with a total harvest of 19 million tons, up by almost 33% compared to 2017 and with a yield of 7.8 tons per ha, ahead of France, which gained 12.59 million tons.
The Romanian agricultural output has recorded over 30 million tonnes of cereals in 2018, up by approximately 11% compared to 2017.

Romania has ranked 1st in the EU at the production of maize in 2018, with an output of over 18 million tonnes.

Furthermore, Romania has ranked 1st in the EU in 2018 at the production of sunflower, with an output of over 3.35 million tonnes.

The wheat production in Romania has exceeded 10.2 million tonnes in 2018, up by 2.3% compared to 2017.
FRD Center is constantly monitoring the developments and opportunities in Emerging European markets such as Romania, facilitating access of potential foreign exporters and strategic investors to the local companies’ decision makers.

**FRD Center assists international companies with overseas expansion and market entry to the Emerging Markets in Eastern Europe, CE and SE Europe.**

Are you a foreign organisation looking to expand, source or to export to the Emerging Markets in Europe?

Perhaps we can collaborate. **We can facilitate your direct access to Decision Makers in relevant local companies, organisations, authorities etc.** More details at [http://www.frdcenter.ro/services/market-entry-and-b2b-matchmaking-in-eastern-europe/](http://www.frdcenter.ro/services/market-entry-and-b2b-matchmaking-in-eastern-europe/)

**As one of the pioneer privately owned market entry advisory firms in Romania, operating for 20 years, FRD Center has high competencies in market entry advisory and is quite well placed to assist foreign exporters with B2B matchmaking and product introduction to buyers in Romania and the region.**

This is a DEMO market analysis. For B2B matchmaking according to your specific needs, contact the FRD Center team at europa@frdcenter.ro
Romanian Agricultural Output 2018 vs. 2017

Source: Trade Map, FRD Center

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According to Eurostat, in 2017, Romania has registered a record production of 14.5 million tons of maize, overtaking France for the first time in history.

Romania ranks first among top maize producers in the EU and has, by far, the most land dedicated to maize production in the EU, estimated at over 1.0 million hectares (mha) above the one of France.

According to Romania's National Institute of Statistics (INSSE), in 2016, Romania occupied the first place for both cultivated area and output of sunflower.

Similarly for maize: Romania occupied the first place for the cultivated area and the second place for output, after France.

In regards to wheat, Romania occupied the fifth place for both cultivated area, after France, Germany, Poland, Spain and output, after France, Germany, UK and Poland.

As for potatoes, in 2016 Romania occupied the third place for cultivated area.

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Are you looking for specific market data?

Contact the FRD Center team at email europa@frdcenter.ro

with your specific requirements.
In-depth market analysis in Romania and Eastern Europe

Are you looking for an in-depth market analysis provider? Is the Agriculture Sector of interest to you?

**Based on your specific market research requirements, the FRD Center can generate a tailored market and competitors analysis in Romania or other emerging markets in Eastern Europe, CE and SE Europe.**

As one of the pioneer privately owned market entry advisory firms in Romania, operating for 20 years, FRD Center has high competencies in market entry advisory and is quite well placed to assist foreign exporters with B2B matchmaking and product introduction to buyers in Romania and the region.

**Send FRD Center your RfQ at email:** europa@frdcenter.ro

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The irrigation systems are a key element in the Romanian agriculture.

According to the Romanian Ministry of Agriculture, through the National Irrigation Programme, a total surface of around 2 million hectares from 88 viable irrigation facilities will be rehabilitated in Romania.

During the financial programming period 2014 - 2020, the Romanian irrigation sector development is financed by sub-measure 4.3 with 100% non-reimbursable financing. In total, through measure 4.3 - Irrigation, a number of 529 applications for funding worth over 524.5 mEUR were submitted. Of these, 257 financing contracts worth €194 million were signed.

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Romanian Imports of Agricultural Machinery 2018

According to the FRD Center analysis based on official Trade Map statistic data, the Romanian imports of Agricultural, horticultural or forestry machinery for soil preparation or cultivation, lawn or sports-ground rollers (TARIC 8432) have been 21.4% higher in 2018 vs. 2017.

Other Romanian imports dynamics in 2018 vs. 2017 analysed by FRD Center using Trade Map data include:

- imports of ploughs (TARIC 843210): +48.3%
- imports of tractors (TARIC 8701): +31.4%
- imports of disc harrows (TARIC 843221): +16.2%
- imports of no-till direct seeders, planters and transplanters (TARIC 843231): +13%
- imports of scarifiers, cultivators, harrows, rotovators and others (TARIC 843229): +1.7%

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According to the FRD Center analysis, in 2018 the Romanian imports of agrotechnology and agricultural machinery has registered interesting dynamics compared to the previous year.

Source: Trade Map, FRD Center

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Romanian Imports of Agricultural Machinery

2019

According to the FRD Center calculations using Eurostat data, the imports of tractors (TARIC 8701) in Romania have recorded 306.8 mEUR in the first five months of 2019, up by 6% compared to the similar period of 2018.

Furthermore, the Romanian imports of agricultural, horticultural or forestry machinery for soil preparation or cultivation, lawn or sports-ground rollers (TARIC 8432) have reached 99.3 mEUR in H1 2019, up by 2.6% compared to the same period of 2018, according to the FRD Center analysis based on Eurostat data.

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Romanian Importers of Agricultural Machinery and Farm Equipment

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

How to access the Romanian Agrotechnology market?
Who are the most relevant Farm Equipment importers in Romania?

For B2B with local importers and distributors according to your specific needs, contact the FRD Center team at europa@frdcenter.ro
FRD Center ([www.frdcenter.ro](http://www.frdcenter.ro)) has excellent business contacts at Decision Maker level with specialised importer-distributors, local buyers and dealers of Agricultural Equipment and Farm Machinery in Romania and Eastern Europe.

The FRD Center can facilitate your direct access to the relevant targets in Emerging Europe, present your products to the Decision Makers and assess their interest, organise for you B2B business meetings and company visits, follow up in the local language with the relevant local players and potential business partners for you.

Contact the FRD Center by email at [europa@frdcenter.ro](mailto:europa@frdcenter.ro) with your specific requests for local market entry assistance and support.
**Examples of Romanian Importers of Agricultural Machinery**

**AGRISORG**

**Agrisorg** imports and distributes horticulture machinery (tractors, cultivators, mowers, sprayers), equipment for green spaces, motors, generators, pumps, snowblowers.

Its portfolio includes the following brands: BCS, Fort, Honda, Xrot, Zucchetti Ambrogio, Active, Grillo, Joans, Gianni Ferrari, Castellari, Pellenc.

The company offers after-sales service. Agrisorg has registered a net turnover of 5.2 mEUR in 2018.

**Agromec Stefanesti** imports and distributes tractors, combines, ploughs, scarifiers, harrows.

Some examples of brands in its portfolio are: Deutz-Fahr, Arbos, Same, Maschio Gaspardo, Dieci, Unia, Dominoni.

The firm offers after-sales service. Agromec Stefanesti has reached a net turnover of 7.4 mEUR in 2018.

*For B2B with local importers and distributors according to your specific needs, contact the FRD Center team at europa@frdcenter.ro*
Examples of Romanian Importers of Agricultural Machinery

**Agrowest BMB** imports and distributes tractors, combines, harvesters, ploughs, harrows, seeders, planters, fertilizer spreaders, scarifiers, cultivators, mower, trailers, slurry tanks, agricultural spare parts.

Some brands in its portfolio are: Lemken, Fendt, Valtra, Grimme, Asa-Lift, Bogballe, Jympa, Maschio Gaspardo, ZDT, Joskin.

Agrowest BMB has registered in 2018 a net turnover of 2.8 mEUR, according to the FRD Center analysis **up by 24%** compared to the previous year.

**Etufarm** imports and distributes trailers, headers, sprayers, harrows, rollers, loaders, tanks, cultivators.

Some brands in its portfolio are: Bodex, Arcusin, Kronos, Deft, Agromash-Kalina.

Etufarm has recorded a net turnover of 4.7 mEUR in 2018, **up by 79%** compared to 2017 according to the FRD Center analysis.

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*For B2B with local importers and distributors according to your specific needs, contact the FRD Center team at europa@frdcenter.ro*
Examples of Romanian Importers of Agricultural Machinery

Sfera imports and distributes ploughs, harrows, scarifiers, seeders, cultivators, atomizers, sprayers, planters, grain equipment (silos, dryers, conveyors, elevators).

Some brands in its portfolio are Maschio Gaspardo, Silesfor etc.

In 2018 Sfera recorded a net turnover of 3 mEUR, up by 11% compared to 2017 according to the FRD Center analysis.

Mecomag H.V. imports and distributes tractors, loaders, ploughs, harrows, balers, cultivators, stone pickers, scarifiers, seeders, planters, trailers, fertilizer spreaders, manure tankers, mulchers, snowblowers etc.

Examples of brands in its portfolio are: Steyr, Solis, Ahwi Prinoth, Thaler, Sukov, Kornos.

The firm provides after-sales service. Mecomag H.V. registered a net turnover of 3.3 mEUR in 2018, which according to the FRD Center analysis is up by 91% compared to 2017.

For B2B with local importers and distributors according to your specific needs, contact the FRD Center team at europa@frdcenter.ro
Romanian Importers of Farm Equipment

FRD Center is monitoring the market opportunities on the Agricultural Machinery and Farm Equipment market and the export opportunities for international manufacturers of machinery and equipment for the Agricultural Sector.

For almost 20 years, FRD Center facilitates commercial relations between foreign manufacturers, investors, exporters with local key decision makers and provides B2B matchmaking, Trade Missions, Inward Buyer Missions, Roundtables etc.

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

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The Future of Romanian Agriculture – example of foreign initiative

At the end of October 2019, within the INDAGRA international fair in Bucharest, took place the seminar "Agricultural education: Partnerships for development and contributions to circular agriculture", initiated by the Ministry of Agriculture and Rural Development of Romania and the Ministry of Agriculture, Nature and Food Quality of the Netherlands, under the coordination and with the support of the Dutch Embassy in Romania.

In this context, Romania and the Netherlands have concluded a 5-year partnership for the development of agricultural education. Through this agreement, the Romanian agricultural high schools will benefit from support from educational institutions in the Netherlands, the two states to carry out a series of joint projects, exchanges of experience and transfer of know-how for a circular agriculture.

The FRD Center team had the opportunity to assist the Royal Dutch Embassy in Romania in several projects including Trade Missions, B2B matchmaking with local players, in-depth market researches etc.

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Do you need a market analysis according to your specific requirements?

Contact the FRD Center team at email europa@frdcenter.ro with your market research brief
Marketing in Romanian Agriculture

TMT PR - THE AGRIBUSINESS & FOOD COMMUNICATORS (www.tmtpr.ro) is an European marketing & PR agency focused on agribusiness and food. Contact Mirela Scarlat, Community Manager at email: office@tmtpr.ro

Join the TMT PR forums and road shows on DIGITAL AGRICULTURE and FRESH FOOD trends and solutions in Romania in 2020.

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Romanian Agriculture Conferences examples

This is a DEMO market analysis. For market entry according to your specific needs, contact the FRD Center team at europa@frdcenter.ro
Marketing in Romanian Agriculture

TMT PR - THE AGRIBUSINESS & FOOD COMMUNICATORS - https://tmtpr.ro/ is an European marketing & PR agency located in Eastern Europe, Romania.

Their mission is to create and maintain a positive perception of your organisation with all ‘stakeholders’, while supporting your business development by connecting you with other partners across sectors and attracting new business leads.

They spend 50% of their time on farm visits in Romania and EU, dealing with real issues that affect not just farmers and rural communities but every citizen, because food is an important matter for all of us.

Their access to different think tanks allows them to provide hands-on advice and recommendations for a variety of certified and tested experts such as researchers, European fund consultants, market analysts, journalists, marketers, graphic and web designers.

Their services include BUSINESS MATCHMAKING, MEDIA RELATIONS, EVENT LOGISTICS, STORYTELLING AND DIGITAL MARKETING.

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FRD Center assists international companies with overseas expansion and market entry to the Emerging Markets in Eastern Europe, CE and SE Europe.

Are you a foreign company looking to source, expand, build strategic partnerships or to find new Clients in Eastern Europe?

As one of the pioneer privately owned market entry advisory firms in Romania, operating for 20 years, FRD Center has high competencies in market entry advisory and is quite well placed to assist foreign companies with a multitude of aspects related to market opportunity assessment, B2B matchmaking with local Decision Makers and M&A in Romania and the region.

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Conclusion

What are the opportunities presented by the markets in Emerging Europe? How to generate a multi-country in-depth market analysis?

Are you a foreign investor / group looking to analyse and enter the Eastern European markets through an acquisition of a Romanian player? Are you looking to generate strategic partnerships with local players in countries such as Romania, Poland, Hungary, Lithuania, Bulgaria etc.?

Perhaps we can collaborate.

As one of the pioneer privately owned market entry advisory firms in Romania, operating for almost 20 years in this market, FRD Center has high competencies in multi-country market analysis and is quite well placed to assist foreign buyers with their Deal Origination and Acquisition Target Search in Romania and the region.

FRD Center has been assisting foreign investors with their market researches and competitive analyses in Romania and other markets in Emerging Europe.
Market Entry with FRD Center www.frdcenter.ro

Market entry to Emerging Markets in Europe

- Deal Origination for M&A
- Target Search and Selection
- 1-2-1 liaison with local players and KOLs
- B2B Matchmaking at Decision Maker level
- Background checks, In-Depth analysis of Players
- Market opportunity assessment and research
- Multi-market analysis
- Local support and on the ground assistance
- Trade Missions and Commercial Visits
- Follow-up, Pursuit of Targets in local languages
Entry onto the Romanian market of 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.

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

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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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