

“BABEȘ-BOLYAI” UNIVERSITY CLUJ NAPOCA
FACULTY OF ECONOMICS AND BUSINESS ADMINISTRATION

SUMMARY OF PHD. THESIS

THE EVOLUTION AND THE FUTURE PROSPECTS OF THE ORGANIC FOOD PRODUCTS ON THE EUROPEAN UNION MARKET. CASE STUDY: ROMANIA

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Cluj Napoca
2013

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- **Key words: organic agriculture, organic food products, agro-food sector, quality, certification, standards**

Introduction

The food market has registered important trend changes during the last years due to the globalization process and thus because of the constant increasing level of competition between the active participants on this market. All these changes together with the demographic ones have imposed modifications that were not always to the benefit of the quality of the food products or even in the interest of the consumers or environmental protection.

The trade relations that are established globally on this market are generating significant positive effects on the economic development. The export of organic food can provide a number of opportunities to the national markets that are identifying the attractiveness of this specific niche market, bearing high prices and recording increased opportunities related to the similar ones that could be generated by the trade with conventional products.

According to the 2010 USDA surveys or to the 2012 FiBL - IFOAM research, the organic food market development has been positive over the last few years, fact that can also be seen as a future trend of development. Increasing competition between traders and new trends in marketing for this category of products, have led to a series of major changes in the factors influencing the market, which is why in this paper we intend to analyse as a central objective which are the steps that have been taken, and what are the main opportunities and threats that Romania will meet in the future regarding the development of a competitive ecological agriculture and food sector on the EU market. At the basis of reaching such a goal stands the idea that for the next years, the organic agriculture and the organic agro-food products are going to develop into a real competitive advantage for Romania in trading relations established internationally and especially at the EU level.

As highlighted in the research, at the global level, the most affected organic food market by the 2009 economic crisis, was the European one, due to the decrease in the

consumer purchasing power at the level of numerous national markets. However (summarizing the data presented in this paper), we can say that the arguments supporting the importance of this sector are based on certainties related to the fact that the European market has remained even in this context the most developed market for organic products worldwide, reaching approximately 50% of global organic consumption.

In order to achieve the proposed objectives, the structure of the thesis was designed around four chapters, which are going to attempt a thorough analysis both from a theoretical and qualitative point of view, representative for the chosen topic and from a quantitative research conducted through the questionnaires implemented on the sample investigated. However, the analysis will also result in a general conceptual research framework and also on the applicative one that defines the subject.

At theoretical and conceptual level (but supported by statistical data), the first three chapters are going to follow the next main objectives:

- To define the agriculture's role in economic development with emphasise on the existing interdependence between the environment and agriculture;
- To define the concepts related to the free movement of goods, and more specific to the free movement of the food products within the EU market with emphasise on defining the quality standards and also on the importance of the certification processes;
- To define de quality in terms of food products, and even more important the organic quality of the agro-food products;
- To underline the differences between the conventional and organic products;
- To track the main trends for the future evolution of the organic food market both at the EU level and also from the Romanian market perspective;

Our paper proposes a multi-criteria research, aiming not only at the study of the behaviour of the Romanian consumers of ecological products, but also at the perspectives that these organic products may have in the future at the level of the European Union market; the goal of the research was to offer viable recommendations of policy in this field, so that long-term success of these products is assured both on Romanian market and on EU market.

Chapter I

The role of agriculture in the economic development

The first chapter aims at illustrating the role of agriculture in the economic development in the global economic context, through an analysis of the structure of demand and offer on the food product market of the most influential factors (demographic, price, consumption, income, etc.). The contextualisation of this analysis will be achieved through an overall synthesis of the situation of agriculture as related to the European Union (through a presentation of the main moments of CAP reform) and Romania, a synthesis of the role and impact of direct foreign investments on agriculture and the agro-food domain in Romania. The shift towards the research of the aspects that govern the ecological agriculture area will be made in a logical way due to the impact that the environment has on agriculture and, implicitly, through the principles that define and govern this specific field of activity.

To outline the theoretical framework of the above-mentioned ideas, and the correlations between agriculture and the economic growth we have stated the arguments used by the authors of "The Limits of Growth" in 1972 (Jay W. Forrester, together with professors of MIT), Johnstone and Mellor (1961), or concepts that are essential for describing the international commerce and were defined by: Adam Smith –"The Wealth of Nations", David Ricardo, S.B. Linder, R. Vernon, etc.

The chapter will also consist of the results of numerous studies and statistical data relevant both for the situation of agriculture at a global level, in the European Union or even at the Romanian economical one (Eurostat, MADR, INSS, ONRC, etc.) and also at the level of the factors that are influencing this correlation (UN, World Population Prospects, 2010; FAO 2012; OECD-FAO, Agricultural Outlook 2012-2021, etc.).

The analysis of the implications that agriculture brings in the economic development supposes a contextualisation of this problem at a global level because the macroeconomic conditions highly influence the economic trading relations and the level of prices with involvements that surmount the national boundaries due to the economic interdependences generated at an international level.

The agricultural sector in Romania was presented in our paper through a SWOT analysis based on the identification of the representative features both for the whole

agriculture in general and for the ecological agriculture distinctively. Thus, we can claim that the Romanian agricultural sector offers several opportunities: the growth of demand for professional formations in rural areas; the access to EU funds; the opening to commerce. All these opportunities can easily be shadowed by a series of threats connected with low performance and limited profitability of this field or by the fact that there still are a lot of regions with a high level of poverty.

Chapter 2

The particularities of the free movement of food products within the European Union

The EU regulations have led to the establishment of a very competitive framework at the level of the internal market of the European Union, the companies having to face both the import products and those of indigenous origin. In this context, the quality standards become extremely necessary, the compliance with these norms offering real competitive advantages to all economic agents involved in this process.

At the same time, we are going to analyze the peculiarities of the free movement of organic food products in the European Union and, implicitly, the regulations and the general quality standards as related to food products and, especially, to the organic ones.

One of the most legislated fields in the Internal Market is the free movement of products, where we can also include food products, organic products being found in the latter sub-field. Population's changes of behavior regarding food products, together with numerous benefits brought by ecological agriculture, especially those related to the quality of life and the development of rural areas, lead to a reconsideration of jobs in agriculture and a reconsideration of the demands connected with food processing and marketing. A series of standards, both internationally and at the level of the European Union, were raised to consolidate the competition between the producers of ecological products and to differentiate the real BIO products of the "pseudo bio ones".

The analysis of the legislative framework that governs the free movement of food products in the European Union will consist of the legislative context that must be taken into consideration in commercial relations, aiming at increasing the number of exports of Romanian ecological products in the EU. The definition of "quality" and the definition of the standards and the activity of standardizing this field in the European Union (as well as the

presentation of the advantages and the costs involved in the standardizing process) will consist in one of the main objective of this paper, because, as it will be presented in our thesis, the concept of “quality” of food products must be defined as related to a series of specific aspects of this market, and its analyze in connection with organic food products involves even a redefinition of this notion, through the highlight of the “ecologic quality” of food products.

Taking into consideration specialized literature and existent practice that deals with the problem of food standards, integrating them into a deeper analysis, which tackles with this topic from the perspective of quality norms and consumers’ protection, we can notice that modern economy must be based on economic improvement that can be achieved through the respect of some standards, quality norms and consumers’ protection, shifting the objectives based exclusively on quantity, to the ones that encourage the gain of quality.

The standard represents the reference document in products’ certification. In the context of a very competitive environment in the European countries, of the disappearance of technical barriers related to trade, certification is playing a more and more important role, allowing, at the same time, the increase of consumers’ trust in commercialized products and assuring a higher level of guarantee of food products’ quality.

In this context of the analysis of food products, ecological quality is the one that demands the respect of some issues related to long-term conserving, protecting and developing the environment. The success of Romanian organic food products depends on the way in which Romanian regulations in this field, together with the laws of the European Union, succeed in implementing and guaranteeing the necessary conditions for the quality, safety of food products and consumers’ protection. The lack of understanding between national standards and the ones of the European Union could lead to the decrease of the competitive capacity and the competition between Romanian products both on the Single European Market and on the Romanian one.

In conclusion, we can summarize all the above by outlining that in the context of the economic globalization and the development of the European Union, we have to achieve a common quality culture through a common infrastructure, removing technical barriers to trade, where in this reality certification and food quality certification have an increasingly important role in consumer protection policies.

Chapter 3

The Organic Food Market. Organic food products in Romanian economy

The food consumption trends, as we have previously proved on the basis of statistical data and market research, have shown a constant evolution both for the demand and for the supply of organic food products, thus the logics of the PhD thesis demands a study of the organic food products' market. This research will exemplify statistically the evolution and the future tendencies as related to organic food products' market from the global level up to the European Union's market, focusing in the end on organic food products in the Romanian economy. At the same time, this chapter aims at claiming and proving that this market is a successful one and is prolific for the development of agriculture in Romania, having real chances of future development.

The general conclusion was related to the fact that at the level of the whole organic food product market (at the global level, but also in the EU, or even more specific, in the Romanian economy), the tendencies of evolution constantly ascended even if many of the other markets were confronted with a decline. This trend could be noticed both at the level of the demand and supply, even if the prices of this category of food are by far higher than those of the similar conventional products.

In Romania, at the level of the analyzed market, the consumers of organic food are not educated enough yet, so when they have to choose this sort of products, they easily confuse organic food products with the ones that are commercialized through traditional markets or come from rural producers. This situation occurs due to the fact that people do not take into consideration the fact that these products have no organic. However, we can identify a rise in the demand and supply for these products on the Romanian market, this tendency being developed throughout time towards the consumption of "healthy and safe" products that obey the ecological quality regulations.

Chapter 4

Case study: analysis of consumers' behaviour on the Romanian organic food market and the analysis of the future prospects for the Romanian organic food products on the EU market

The role of the consumers on a very competitive market is decisive for the tendencies of evolution and its future perspectives. The market investigated in this PhD thesis- the organic food market- has had a great role in the last few years, due to the obvious changes in consumers' behaviour and their increasing interest in "healthy" food, all these resulting in a quick development of the organic food market.

In order to gather the necessary data for this case study we have used the quantitative research by means of a questionnaire, trying to transform our objectives into relevant questions so as to obtain as much information as possible.

The two major objectives were formulated as follows:

1. Analysis of consumers' behaviour on the Romanian organic food product market (the people who were questioned were chosen from two cities – Cluj-Napoca and Deva). The market study regarding the analysis of the organic food consumers' behaviour and the analysis of the organic food product market in Romania investigated 400 people, from which 394 questionnaires were declared valid - 178 in Deva and 216 in Cluj-Napoca.
2. Analysis of the Romanian organic food product perspectives on the EU market - the questionnaires were implemented in 2008 and the final results quantified 18 questionnaires completed by: 8 Romanian organic food products exporters, 3 German importers of Romanian food products, 7 Romanian inspection and certification bodies.

In terms of market research the results proposed to be pursued have focus on the following aspects:

- Establishing the share of organic food consumers and evaluating the motivational factors of the acquisition;
- Evaluating consumers' attitude regarding organic food products; we have estimated this attitude as being a favourable one, although this cannot be always found in consumption;
- Information obtained may establish awareness of consumers about: the differences between organic and conventional products, the importance of certification of organic

products, Romanian organic brands available on the market, and Romanian product categories most frequently encountered.

- Evaluating the way in which the Romanian organic food products integrate (in terms of range, accessibility at sale points and information) on the Romanian food product market.
- Evaluating consumers' preference for national or foreign products as well as for the sale points they mostly choose.
- Evaluation of prospects that the Romanian organic products have on the EU market;
- Evaluation of the issues involved in the certification process, marketing / export of Romanian organic food,
- Identifying measures that should be undertaken in order to capitalize on the benefits offered by this market;
- The conclusions should develop into policy recommendations for the success of the Romanian organic food products on the EU market;

Conclusions

The perspectives for organic agriculture in Romania are definitely positive because: the demand for export is high - this being proved by the fact that most of the production is aimed at export, which offers the farmers and investors real possibilities of gain; the cost of labour force, of lands and of capital is still lower than in the investors' native countries; the Romanian market is generally a young market, offering a lot of possibilities for development. However, organic agriculture must not be seen as the only viable solution for the renewal of the whole Romanian agricultural area, but as a new market with a real potential that has not been exploited yet at its real capacity. At the same time, we have to take into consideration that there are not enough regulations to assure the correct authenticity of organic products and as it might have been noticed throughout our thesis, most of the times, the Romanian consumer does not have a clear perception over what an organic product is, even if he/she claims to be a consumer of organic products.

The agro-food field has developed a lot in Romania lately and there has been a constant interest in the encouragement of this field, this interest being developed in a very competitive spirit in the Romanian agriculture.

This process can be ended as we have tried to illustrate, only if all the EU quality conditions are obeyed, the standards checked, the safety of food products and consumer's protection are respected.

In the light of this evidence, we can notice that in the context of the globalization of the economy and the development of the European Union, we have to achieve a common quality culture where the certification process of food products has a determinant importance, and where all these issues have gained a more important role in consumers' protection policies.

The organic food products market was defined and analysed in our paper taking into consideration the determining features of the organic food products market in the Romanian economy. The general conclusion was related to the fact that at the level of the whole organic food product market the tendencies of evolution constantly raised even if many of the other markets were confronted with a decline. As we have tried to highlight through the results of our research, the development of some Romanian brands of organic food products could be one of the most important instruments in the successful trade on the EU market of products bearing an additional value added to surmount the moment in which Romania is just a competitive source of raw materials.

In the last chapter of our thesis- Chapter 4, two themes of research were analysed. Research objectives and results generated by the proposed study for the first issue were:

- The identification of the percentage of organic food products consumers at the level of the Romanian organic food market that was investigated – the results have indicated 63% of those that were questioned;
- The evaluation of consumers' awareness of:
 - The differences between organic products and natural or conventional products: as it could be noticed, consumers are aware of the differences between these products but they do not identify these differences correctly, most of the time confusing organic products with those commercialized on traditional markets.
 - The importance of the certification of organic products; the consumers stated that the certification process is important to determine the producers and the processors, to follow the standards and only afterwards to improve the degree of trust in these products

- The existing Romanian organic brands and the category of products that are the most common sold - the consumers remembered some organic food brands such as: LaDorna or Topoloveni (the most frequent in our questionnaires);
- The evaluation of the way in which Romanian organic products integrate on the Romanian organic food market (through a wide range of products- not sufficient- 69% Cluj – Napoca / 73% Deva, accessible in commercialising areas– not enough 64% Cluj-Napoca / 68% Deva and the access to information for consumers– insufficient 81% Cluj-Napoca, 77% Deva);
- The evaluation of the motivational factors that make the consumers choose these products (quality, environmental protection, lack of additives, price, etc.)- the main factors named in the questionnaires being those related to the fact that these products are healthier, they do not contain additives, etc., they have also mentioned between the factors: the food safety, the environment and biodiversity protection, their high quality and taste. Concerning their appearance, packaging and labelling, the consumers claimed that these factors were not very important.
- The evaluation of the frequency of the acquisition of organic food products. Most of those who were questioned tend to buy organic products weekly, and concerning the type of products they buy, the most frequent choices were: fruit, vegetables and dairy products. Regarding the final evaluation, the main problem that has demotivated the consumers in buying organic products was their price (Cluj-Napoca – 66%, Deva – 68%).
- The evaluation of consumers' preference for national or imported products and for the places used for commerce that were among people's preferential areas – the preference for the national products is clear (Cluj-Napoca – 68%, Deva – 82%), as well as the acquisition of these products directly from the producers or from traditional commerce (Cluj-Napoca – 61%, Deva – 60%), or from supermarkets (Cluj-Napoca – 28%, Deva – 22%).

For the second problem, the one related to the perspectives of organic food products on the EU market, the following objectives could be noticed:

- The evaluation of the perspectives that Romanian organic products have on the EU market-all those who were questioned regarded them as favourable.

- The evaluation of the way in which the quality of these products is perceived on the Romanian internal market as well as among the importers of these products - in all the cases the opinion was the same and people expressed their preference for the high quality of these products (regarding their taste or other comparing elements).
- The analysis of the competitive degree that these products have on the external market - it is claimed that this degree is a high one due to the above-mentioned arguments and due to the fact that the fields in Romania are generally clean and the conversion period is smaller than the period in the other constituent countries of the EU.
- The identification of the main categories of organic food products that Romania exports - honey, fruit and vegetables.
- The evaluation of the problems that appear in the process of certification, trade / export of Romanian organic food products- concerning the export activity, there were no major problems and there has been an increasing external demand of these products. Concerning the problems that may appear in the process of certification, the following issues have been stated: the non-observance of the standards' regulations (crop rotation, use of conventional seeds and seedlings, unauthorized treatment, recording and incomplete documentation of environmental activities, etc.), the use of non-listed products, the discovery of bacteria due to lab analysis, the lack of plans for the protection of plants and for farm cultures, the parallel culture in conventional system, the inefficient care of animals (the surmount of admitted percentage of conventional supply of food).
- Our paper also aimed at identifying some measures that should be taken to develop the advantages offered by the Romanian market.

Among these ones we can mention: better informing consumers regarding organic food products, highlighting the differences between these products and conventional ones or the products that are commercialized in traditional markets (the lack of information being proved by the results in the questionnaires). This recommendation stands even if, lately, information related to this kind of products is given in most of the mass-media sources. However, advertising has not succeeded in defeating consumers' lack of trust in the certification of this sort of products. This type of promotion can be also supported by several events (meetings, TV shows, presentations, etc.), through the active involvement, through information and education of "spokespersons" that are credible and convincing enough

among consumers (doctors/ medical centres/ family doctors etc.), excerpts in specialized magazines, active actions in the main commercializing areas, the organisation of seminars and specialized conferences by producers or processors, events organized together with consumers' organizations, etc. (some of these actions have been effective lately).

- The encouragement of responsible operators to process raw materials obtained through organic agriculture and, at the same time, encouraging them to export traditional products bearing Romanian brands (the most important aspect being their presentation, packaging, labelling, promotion) and not to export en-gross raw materials. We propose this for a better recognition of the Romanian bio products and for an increase in the number of workplaces, the development opportunities created this way in rural areas as well as the gain of an economic value added through the development of these activities.
- The support of farmers (information - training courses, seminars, etc., direct subventions,¹ credit policy, etc.) to surmount extra difficulties that this type of agriculture involves, as well as the desire to avoid problems that could occur in the process of certification through the decrease of those who have got problems in the moment of certification due to the non-observance of the standards and regulations. In addition, this support should be driven towards the gain of European funds in this activity field, the rates of absorption being rather low until now.
- The support of associated forms of production, as well as the encouragement of farmers' joining a specialized line of organic production
- The promotion of a unitary country brand for finite organic products, an initiative that can be supported both for this category of products and for the one of Romanian traditional products.

To conclude, Romanian organic products have a real potential that can be successfully valued on the EU market. At the biggest fair taking place every year, in Nuremberg, Germany, Romania has been declared this year (2013) "The Country of the Year", being recognized for positive evolution noticed throughout the last two years. At the same time, through the data we have collected, we can claim that the perspectives of commercialising

¹ The overall amount for subventions in 2012 was 4,098 million euros, with almost 1 million higher than the year before. – Source: EcoMagazin, *Producatorii din sectorul de agricultura ecologica vor putea depune cererile pentru subventii*, 13th of September 2012, data accessed in February 2013 at: [<http://www.ecomagazin.ro/producatorii-din-sectorul-de-agricultura-ecologica-vor-putea-depune-cererile-pentru-subventii/>];

Romanian organic food products on the EU market are favourable, our products being completely competitive with the European ones.

Consequently, the key to the development of Romanian organic brands is connected with the efforts of increasing consumers' trust and awareness in the process of certification of these products and, implicitly, relevant information should be offered to consumers, aiming at increasing their interest in this sort of products. At the same time, consumers should be aware of the differences between real organic products and so called "pseudo-bio-products".

Regarding future directions of study, they should take into account the limitations and obstacles encountered in the implementation of research and analysis to increase the accuracy of data collected and the results generated. At the same time, we can aim at extending our research at the level of the whole market of organic food products in Romania to identify and analyse the possible differences or similarities concerning the perception and consumers' behaviour regarding the organic products. We also consider that the research developed in 2008 could be resumed again in 2013, so as to compare the points of view of the investigated in the new economic context influenced by the important changes that have occurred in the evolution of global economy.

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