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SUPPLY CHAIN IN ROMANIA

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CONTENT

1	Introduction to the dairy sector.....	4
2	A dual sector ?.....	5
3	Prospects for dairy product consumption.....	5
4	Expert views on the challenges at the level of the milk production.....	6
5	Expert views on the challenges at the stage of milk collection from farms.....	7
6	Expert views on the challenges at the milk processing stage	8
7	Conclusion.....	9
	Annex 1: Information on the primary production.....	10
	Annex 2: Information on the processing and manufacturing sector	12

1 Introduction to the dairy sector

The dairy sector is significant as part of the national economy because rearing dairy cows is an important and traditional occupation in rural areas, especially in mountain districts; it brings regular incomes, contributes to the stability of the labour force in these areas and makes good use of the pastures and hayfields that cover about 33% of the agricultural land in Romania (NIS). Also, the biological importance of milk and its derived products make them strategic items on the agri-food market and in the economy.

Economic indicators that show the importance of the sector in the economy are: a) its share of total agricultural production 16%, on average during 2000-2003; b) its share of total animal production, 42.5% on average during 2000-2003 (Grodea 2005a).

The amounts of national support directed towards the dairy sector further underline its importance in the national economy. In 2006, the amount of financial support granted to farmers rearing cows and buffalo for milk is 250 mil RON (€71 mil). This is the largest amount granted to any sector, more than half of the total support (400 mil RON, which is €13.5 mil) provided for livestock producers this year. Cow and buffalo milk producers in mountain areas are eligible also for compensation payments (about €42/head); the budget for these payments is €9.3 mil. The amount of support for farmers rearing sheep and goats is 18.28 mil RON (€5.19 mil) (MAFRD Ordinance no. 219/2006). As from 2006 direct support for milk producers is to be paid per head and not per litre of milk, as it used to be. The government also provides grant aid for investments in the sector.

As regards primary production, the size of the dairy herd (cows and heifers) did fluctuate during 2000-2004 around an average of 1758 thou heads and in 2005 increased to 1818 thou heads. Raw cow and buffalo milk production increased as well, up 14% during 2000-2005, from 4851.8 mil litres in 2000 to 5533.4 mil litres in 2005 (Fig. 1). We mention that cow and buffalo milk represents about 93% of total milk production in the country. The average milk yield has constantly increased from 2925 litres/cow/year in 2000 to 3414 litres/cow/year in 2005, an increase of 16.72% (Fig. 2) (NIS, MAFRD).

The milk processing sector has undergone important changes during recent years. The number of milk processing units decreased, from 831 in 2000 to 361 in June 2006 and the more even spread of turnover, after 2002, across the various sizes of factory, indicates that it is the smallest units which have gone (Table 3). Also, investments have been made to improve technology, buildings and transportation. The total amount of investments in the dairy industry recorded by NIS during 2000-2004 was €90.7 mil (Table 4). The main companies on the market are Friesland Romania, Danone, LaDorna, Hochland, Albalact, Covalact. (Retail Magazin 2006, p.21)

The consumption of milk and dairy products has been on an upward trend over recent years, even faster than during the 1990s. In 2002, the average consumption of milk and dairy products, excluding butter - in milk equivalent - was 215 litres (221 kgs)/head, and by 2005 it had risen to 234 litres (240.5 kgs)/head/year: a total increase of 21.24%. Butter consumption has been very low and remains quite constant, 0.3 kgs/head/year (NIS, MAFRD).

Regarding external trade, Romania has been a net importer of milk and milk products during the period analysed. The balance is positive only for cheese. In 2005, the total value of exports was double compared to 2000, but it was still half of the value of imports. Quantities of both imports and exports

rose during this period, but the ratio of imports to exports fell from 4 times to 2.4 times (Table 5.) The main trading partner of Romania has been the EU.

2 A dual sector?

If we consider the structure of dairy farms in 2006 (Table 1.), we have a strongly asymmetrical distribution. The 93% of the dairy farms with only 1-2 cows per holding contribute 75.6% of the national herd while only 0.46% of farms with herds of more than 10 cows per holding (those that we can consider commercial or potentially commercial) provide 8.5% (see Workbook for more details).

According to data provided by the 2002 General Agricultural Census, about 30% of the milk producers sell raw milk, and about 5% sell milk products, with some of these selling both. We can say that about 70% of the milk producing farms are subsistence farms producing only for their own consumption, about 25% are semi-subsistence farms selling just a small part of their production, (less than 50%), and less than 5% of the farms can be considered commercial or potentially so, producing mainly to sell. Even among farms that sell milk products only some 1% sell more than 50% of their production (Table 2). This situation, hasn't improved much since 2002.

As regards processing, Romania now has 361 processing units, of which about 55 collect approximately 70% of the delivered milk, according to the milk processors association.

3 Prospects for dairy product consumption

Most of the liquid milk and a large part of some dairy products consumed by the population are not industrially processed because only a small part of the milk produced on farms, about 22%, is delivered to plants and therefore industrially processed; the destination of the rest of 78% of the milk is on farm consumption (about 53% for human consumption & livestock feed) and direct sales to consumers on the markets (about 25%) in raw state or processed into basic products (cream, cheese, yoghurt) that are easy to make on farm without complicated technology (for more information on destination of milk produced on farm see Fig. 3).

In 2005, consumption of liquid milk was on average 72 litres (74 kgs) per capita. There are notable differences though between urban areas (62.4 litres – 64.14 kgs) and rural areas (81.6 litres – 83.88 kgs). Among the processed liquid milk types, pasteurised semi-skimmed milk is the most popular. One of the reasons is price. UHT is still expensive for the majority of population. (NIS 2006c, p.91)

Fresh milk and fresh milk products (yoghurt, cream, fresh cheese) are the most commonly consumed items, with cheese next in the hierarchy. One of the reasons is the above mentioned high level of on-farm consumption and direct sales to consumers. On the other side, processing units also produce mainly these items, about 90% of their production, with butter, powdered milk and other products making up the other 10%. This is, partly because of the lack of the necessary storage facilities and of financial incentives to build storage capacity and stocks. After joining the EU, the intervention system including storage aids could lead to increasing production and stocks of butter and milk powder.

The low level of butter consumption can be explained by its high price (varying between 3.5 and 10 €/kg – retail prices); people replace it with margarine, which is a lot cheaper (varying between 1.13 and 2.26 €/kg – retail prices), or animal fats (i.e. pig fat)

Regarding factors that influence consumption, in urban areas especially (where milk has to be bought), Romanians buy milk first of all because they consider it healthy and because they like its taste (Gallup 2002). When deciding which product(s) to buy, price is still the most important factor, because of the low incomes of the majority of the population. Another important factor that influences consumption is advertising, (especially TV adverts), that have proliferated in recent years. According to experts, the design of product packaging is another important factor in these buying decisions.

For the immediate future, experts forecast further increases in the demand for and consumption of all milk & dairy products, particularly liquid milk, cream and cheese. Some of the determinants of this trend will be rises in real incomes per capita, taste preferences, wider product range and integration into the EU (IAMO, 2004).

4 Expert views on the challenges at the level of the milk production

Expert opinion is that the quality of raw milk has improved since 2004. The stimulus for this improvement has been the introduction by processors of payment for quality (fat content, levels of bacteria and somatic cell count); also, the national support scheme for this year includes quality premiums.

The SAPARD programme contributed to improving the situation at farm level. By the end of 2005, 224 investment projects on cow/buffalo farms had been approved and granted financial support (measure 3.1, sub-measure 6). The total value of this support was €2.39 mil, 79% of the total allocated for this sub-measure (€8.29 mil) up to the end of that year (MAFRD).

So far, farmgate prices have been low (Fig. 4) and small farmers especially, have preferred to sell their milk directly to consumers; not only are prices significantly higher, but they are paid on the spot, with none of the delays which frequently occur when delivering to processors. Farmers are in a weak negotiating position relative to the processors because there are too many producers and their associations are not effective enough; furthermore, most of the collection centres are owned by the processors.

Hygiene is a problem because many small producers cannot achieve the required standards as most of them do not have milking and cooling equipment. This is not a problem on large farms. Other problems are the low genetic quality of the dairy livestock and the poor housing conditions of animals leading to low milk yields in comparison with the EU as a whole.

These problems are being addressed by both the government and the private sector. The official support scheme for this year consists of subsidies for the improvement in the genetic base, premiums to stimulate improvements in the quality of raw milk (levels of bacteria and somatic cell count) and to increase the quantities of raw milk delivered to processing units (G.D. no. 1853/2005 amended by G.D no. 258/2006 and G.D. no. 1266/2006).

Governmental support has also been available for investments. A programme that started in 2005 and ends in 2006 has helped private milk producers (legally established farmers associations and

individual agricultural producers - natural persons, registered in the Agricultural Holdings Register) to buy *new* milking, cooling and other essential equipment. The support consisted of a grant equivalent to 60% of the price of the equipment. The total budget for the programme is 150 mil RON (€42.7 mil) (G.D. no. 785/2005 amended by G.D. no. 258/2006 and G.D. 1288/2006). Friesland Romania, an important player in the dairy market contributed its own initiative to this programme. It helped 2090 small milk producers with the balance of 40% of capital required to buy equipment. In exchange, these producers will deliver milk to the company to reimburse this amount. La Dorna, another important company, offers financial support to farmers who want to establish cow and buffalo micro-farms (20 head) to EU standards. The company pays 50% of the investment costs and buys the milk produced on these farms.

These are 2 notable examples but most processing units support their milk suppliers by financing milking and cooling equipment, feed, medicines and by paying quality premiums.

The Romanian Development Bank (RDB) introduced a product especially for milk producers. It offers medium-term (up to 5 years) investment loans for cow milk producers who have a delivery contract with one of the main milk processing companies. The credit can be used for purchase of cows, equipment, for building and other on-farm improvements and also for land acquisition

“The Farmer” governmental programme created to stimulate investments in agriculture and the food industry and to accelerate the use of SAPARD funds (some 90% of the resources of the fund are targeted towards the co-financing of SAPARD projects) is a source of investment loans with a low interest rate (5%) that both milk producers and processors can use; so too are the Apuseni Mountains Rural Development Project and the Rural Finance Project.

After joining the EU, the introduction of the CAP in Romania is expected to affect small and large producers differently. The big farms will be winners but the small farms could be losers because they won't be able to sell raw milk and, many small farmers (those with less than 1 hectare of agricultural land) who get financial support under the present scheme in Romania will not get any under the CAP.

Regarding the quota system, the MAFRD estimate that about 400,000 producers will ask for individual quota for deliveries and the same number will do so for direct sales. Experts consider that the quota system will lead to concentration of the dairy herd onto fewer farms with the effects beginning to appear about 2-4 years after implementation. By 2009, some improvements in animal welfare and in milking and cooling provision are expected along with there being more funds in state support programmes.

5 Expert views on the challenges at the stage of milk collection from farms

In Romania, there are 3,233 collection centres recognised by the National Sanitary-Veterinary and Animal Health Agency (MAFRD). Approximately half of these are authorised, but we don't know exactly how many centres comply with EU standards; according to experts, there might be more of them that meet the EU requirements but which are not yet authorised due to the high costs of registration.

Most collection centres are owned by the processing units; they have invested in them, equipped them, paid for registration etc. This situation makes the producers dependent upon processors, and it places

them in a weak position when negotiating. For this reason, private collection centres owned by producers groups have begun to be established in recent years, though there are still very few

Among the challenges at collection level is the high cost of transport. There are a number of interrelated causes: the large number of small producers leads to a large number of centres collecting small quantities of milk, there are significant distances between the main production regions and the locations of many important processing units and the roads in rural areas are in poor condition.

In the second quarter of 2006, processors have begun to close the small collecting centres which economically are not profitable to be equipped to EU standards for testing the quality of raw milk. This results in reduced incomes for producers who had supplied those centres.

6 Expert views on the challenges at the milk processing stage

Recent years have seen important changes and improvements at the processing level. Between 2000-2002 there was a significant concentration of turnover achieved, but since 2003 this has begun to spread and the number of processing units has decreased. During the 2000-2004 period the number of processing units fluctuated around 813; in 2005 only 522 remained and by June 2006 the number had fallen to 361 (Table 3). Of these 361 units, 49 already meet the EU standards, 217 will meet them by the accession date, 75 are listed for the transition period up to 2009, and 20 will be closed because they will not be able to meet the requirements (MAFRD). Industry experts predict an even greater concentration of the dairy industry by 2009.

The main successes are the investment levels over the years (Table 4) and the increasing value of milk and dairy products. More than 60% of investments were made in technology. As regards these investments, own resources from within the industry account for the largest part (more than 70%) (NIS). The SAPARD programme also helped. By the end of 2005, 78 projects had been approved and granted support for improvements in the processing and marketing of milk and dairy products (measure 1.1, sub-measure 1), having a total value of €42.26 mil. This amount represents 61.7% of the value allocated during 2000-2005 to this sub-measure (68.51 mil euro) (MAFRD).

Production capacity is a feature of the domestic dairy processing industry. 117 units have a high processing capacity (more than 2000 tonnes of milk per year), 165 are medium capacity (between 500 and 2000 tonnes per year) and the remaining 79 can process up to 500 tonnes per year. (MAFRD).

Despite the improvements there are many challenges remaining for processors. The amount of milk collected from farmers represents just about 22% of total production. Collection and transportation costs are high because of the preponderance of small producers. The quality of raw milk collected from small producers does not yet meet EU standards. This implies higher processing costs and of course higher prices for consumers. Investments in technology especially, the help offered to farmers to improve the quality of raw milk are intended to lower processing costs which have been higher than in the EU. After accession, another challenge that processors will have to deal with is the anticipated high amount of "imports" of milk products from other EU countries.

7 Conclusion

Problems in the dairy chain start at farm level: poor farm structure (too many farms and the small number of cows per farm); the low genetic quality of cows; the poor quality of raw milk on small farms. These factors affect problems on the next levels. The farm structure leads to high costs of collection and the fact that raw milk does not yet meet the EU quality requirements implies additional processing costs to bring it up to the approved standard. The processing costs are increased also by high taxes and increasing energy/utilities costs. Hence, milk and milk products have both quality and cost disadvantages that reduce the Romanian dairy industry's competitiveness on the EU market.

The increasing value of milk and dairy products is one of the successes of the dairy industry. The low milk supply to plants and the high processing costs are a challenge for processors.

The introduction of the CAP in Romania will affect the small and the large milk producers differently. The decrease in incomes of small milk producers could lead to social problems, particularly in rural mountain areas. Associations of small producers, for which the legal framework already exists, could be a route to survival for many of them.

Dairy farms could become more competitive if there were an increase in average size. This would make it profitable to use modern technology (breeding techniques and milking and cooling equipment), then production costs per unit would decrease and the quality of milk would improve. Experts forecast that the quota system will lead to concentration of the livestock on to fewer farms, but these effects are not expected to show up until some 2-4 years after it is introduced.

Annex 1: Information on primary production

Fig. 1

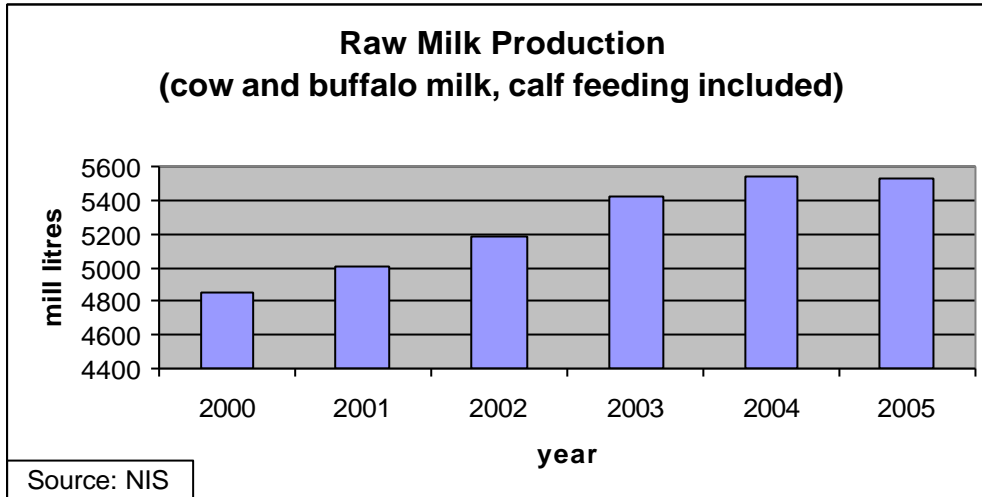
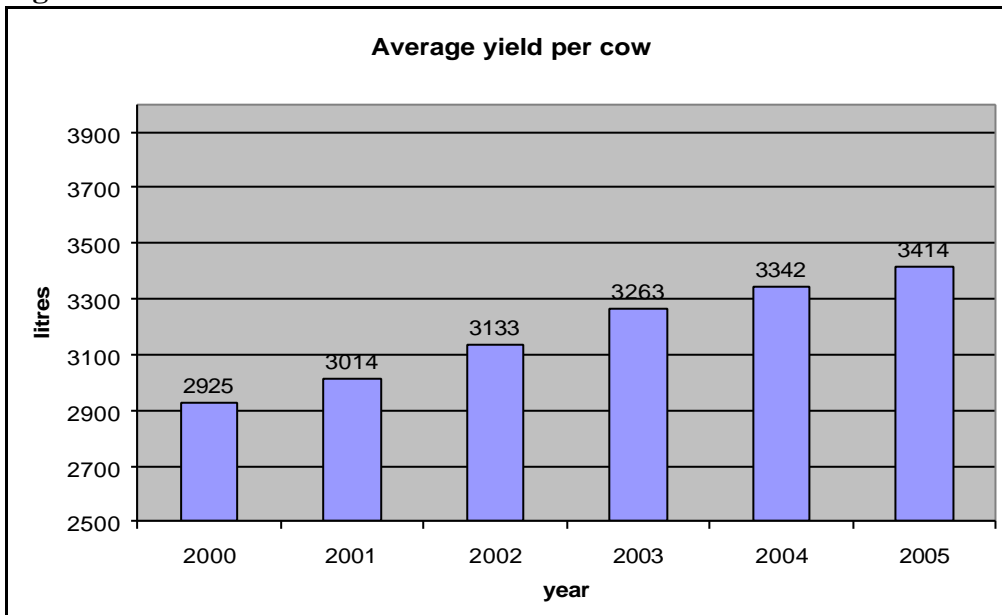


Fig. 2



Source: MAFRD

Table 1. Dairy farm structure at 1st May 2006

Herd size	Herds		Cows	
	No.	%	No.	%
1 to 2	1030129	93.12	1314118	75.65
3 to 5	63054	5.70	215013	12.38
6 to 10	8046	0.73	60077	3.46
11 to 15	2280	0.21	38925	2.24
16 to 20	1220	0.11	23100	1.33
21 to 30	704	0.06	17578	1.01
31 to 50	443	0.04	16980	0.98
51 to 100	246	0.02	16892	0.97
over 100	164	0.01	34382	1.98
Total	1106286	100	1737065	100

Source: MAFRD

Table 2. Dairy cow farms at the 2002 General Agricultural Census, by commercial activity

Dairy farms that:	sell liquid milk		sell milk products	
	no.	%	no.	%
Sell more than 50% of the production	64,099	5.43	9,115	0.77
Sell less than 50% of the production	297,330	25.18	45,020	3.81
Total	361,429	30.61	54,135	4.58
Total dairy cow farms 1,180,801				

Source: 2002 General Agricultural Census

Fig. 3 Destination of total cow and buffalo milk production (calf feeding included)

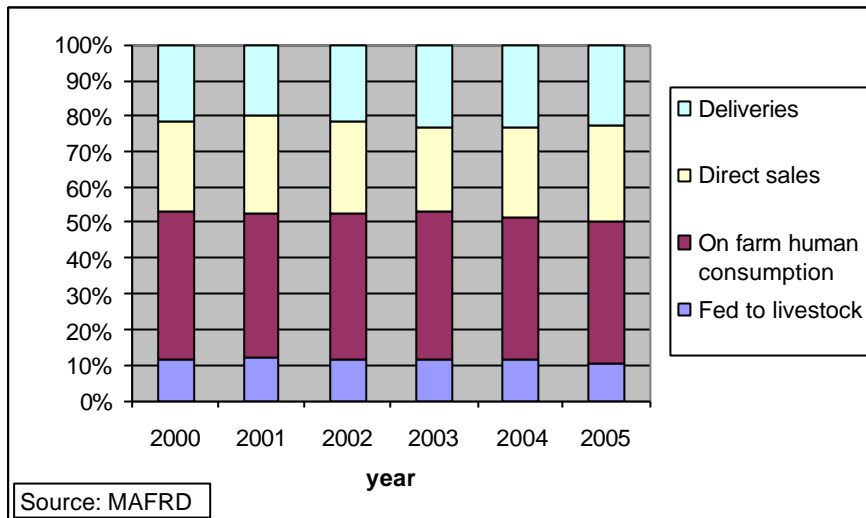
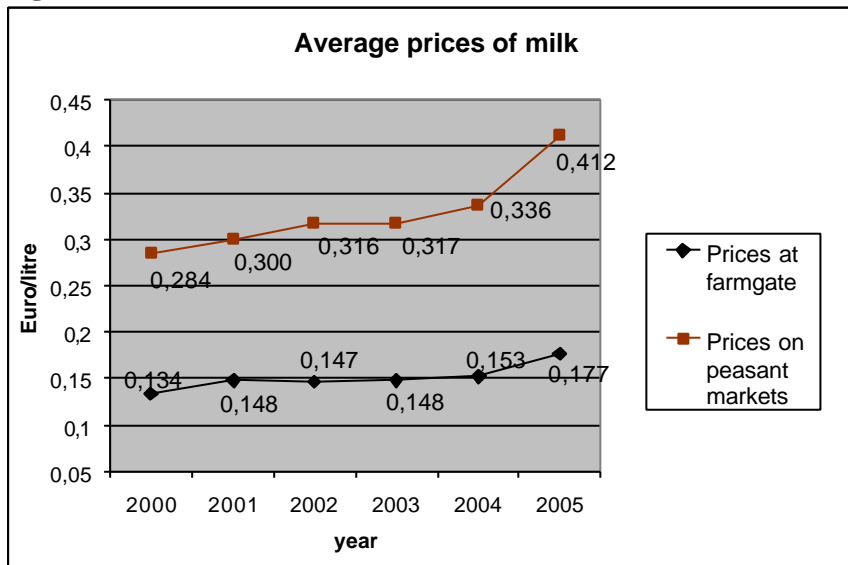


Fig. 4



Source: NIS

Annex 2: Information on the processing and manufacturing sector

Table 3. Indicators of concentration of the dairy industry

Year	No. of processing units	Processing capacity			Share of total turnover achieved	
		High (> 2000 t/year)	Medium (500-2000 t/year)	Small (less than 500 t/year)	Share of top 5 companies - % -	Share of top 20 companies -% -
2000	831	n.a.	n.a.	n.a.	42.25	77.47
2001	791	n.a.	n.a.	n.a.	43.54	78.45
2002	835	n.a.	n.a.	n.a.	46.55	81.54
2003	812	n.a.	n.a.	n.a.	34.80	63.52
2004	798	n.a.	n.a.	n.a.	35.18	62.19
2005*	522	153	194	175	n.a.	n.a.
2006*	361	117	165	79	n.a.	n.a.

Source: NIS, *MAFRD

Table 4. Pattern of investments in the dairy industry

Year	Investments -mil Euro-
2000	57.3
2001	23.2
2002	34.3
2003	38.4
2004	37.5
Total	190.7

Source: NIS

Official exchange rates provided by the National Bank of Romania were applied for each year

Table 5. External trade of milk and dairy products during 2000-2005

Year	EXPORTS			IMPORTS			
	Total quantity -000 tonnes-	Total Value ¹ -mil euro-	Unit value -euro/kg-	Total quantity 000 tonnes-	Total Value ¹ -mil euro-	Unit value -euro/kg-	
2000	3.63		8	2.2	14.65	29	1.98
	of which:			of which:			
	Milk powder	0.85	1.37	1.61	5.13	9.45	1.84
	Butter	0.08	0.18	2.20	1.00	2.15	2.15
	Cheese	2.64	6.21	2.35	1.55	4.46	2.88
2001	3.9		10	2.56	12.69	33	2.6
	of which:			of which:			
	Milk powder	1.22	1.96	1.61	4.70	10.38	2.21
	Butter	0.03	0.05	1.52	1.00	1.91	1.91
	Cheese	2.47	6.64	2.69	1.31	4.86	3.71
2002	3.22		9	2.8	14.82	31	2.09
	of which:						
	Milk powder	0.218	0.43	1.97	5.98	10.67	1.78
	Butter	0.001	0.00	1.05	1.80	3.05	1.69
2003	3.14		10	3.18	15.2	31	2.04
	of which:						
	Milk powder	0.14	0.21	1.50	5.85	9.08	1.55
	Butter	0.004	0.01	2.00	3.34	4.88	1.46
2004	6.67		14	2.1	12.9	32	2.48
	of which:						
	Milk powder	1.51	1.7	1.13	3.46	5.91	1.71
	Butter	0.2	0.31	1.55	3	4.7	1.57
2005 ²	8.8		16.5	1.87	21	32.8	1.56
	of which:						
	Milk powder	3.24	3.3	1.02	4.17	6.25	1.50
	Butter	0.14	0.32	2.29	3.67	7	1.91
	Cheese	4.3	12	2.79	3.54	12	3.39

Source: National Institute of Statistics; FAOSTAT

¹ total values comprise milk, dairy products and eggs

² total value of milk and dairy products without eggs

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Legal Acts

Emergency Government Ordinance no. 29/2000 regarding support granted to milk producers (M. Of. No. 160/ 17 Apr. 2000)

Emergency Government Ordinance no.192/2005 repealing Emergency Government Ordinance no. 29/2000 regarding support granted to milk producers (M. Of. No.1179/ 28 Dec. 2005)

Government Ordinance no. 48/2005 regarding the organisation of the market in milk and milk products (M. Of. no. 781/ 29 Aug. 2005)

Government Decision no. 785/2005 for approving the Programme that grants support to milk producers associations and individual milk producers. to buy new milking and cooling equipments and other specific equipments (M. Of. No.705/ 4 Aug. 2005)

MAFRD Ordinance no. 1.289/2005 recognizing the Council on “Milk and milk products” (M. Of. no. 19/ 10 Jan. 2006)

Government Decision no.1853/2005 regarding direct state support in 2006 for agricultural producers in the livestock and fishery sectors and conditions for granting subsidies (M. Of. No 21/ 10 Jan. 2006)

MAFRD Ordinance No. 219/2006 for approving the amounts per animal species for which subsidies are granted according to Government Decision no.1853/2005 (M. Of. No. 292/ 31 Mar. 2006)

Government Decision no. 258/2006 amending Government Decision no. 785/2005 and Government Decision no. 1853/2005 (M. Of. No.191/ 28 Feb. 2006)

Government Decision no. 1266/2006 amending Government Decision no. 1853/2005 (M. Of. No.792/ 20 Sept. 2006)

Government Decision no. 1288/2006 amending Government Decision no. 785/2005 (M. Of. No.807/ 26 Sept. 2006)