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CONTENT

1 Introduction to the meat sector

Since 1990, meat production has reflected the declining livestock herds of all species, with small producers adjusting their herds to meet their own consumption needs and the limited demand from local markets. The downward trend in meat production until 2001 was due to the fall in domestic demand (linked with the population's declining purchasing power), as well as other factors that had a negative impact upon livestock herds. A recovery of the sector has taken place since 2002 due to the increase in the number of livestock herds that has been supported by subsidies in the form of premiums both for the rearing sector and for the meat delivered to slaughterhouses.

Meat production increased its share of the total value of animal production from 38% in 2000 to about 53 % in 2005, of which pigmeat contributed 23%, poultrymeat 16%, beef 10% and mutton 4% (Annex 1).

Meat production and processed meat products had a reasonably significant share of the food industry, contributing between 16% and 20% in the period 2000-2005. Domestic production supplies the majority of the population's consumption, although its share decreased from 91% in 2000 to 75% in 2005, while the proportion of imported meat increased from 9% (71,400 tonnes) in 2000 to 25% (408,200 tonnes) in 2005 (Annex 2) to make up the difference.

2 Structure of the sector and recent developments

Total meat production in Romania increased by about 4.2% in the period 2000-2005, from 1.45 milliom to 1.5 million tonnes liveweight. Pigmeat contributed 40.1% of the total, poultrymeat 26.6%, beef 25.3% and sheep and goatmeat 7.5% (Annex 3). Over the same period the total production of industrially processed meat (meat, meat preparations, canned meat) increased by 60% from 362,000 tonnes to 582,000 tonnes, primarily due to the doubling in production of meat preparations from 147,000 tonnes in 2000 to 290,000 tonnes in 2005 (Annex 4).

Beef

Between 2000 and 2005 the total number of cattle remained at a relatively constant level of around 2.8 million (Annex 5). After 2000, meat production in liveweight terms rose from 330,000 tonnes to 383,000 tonnes in 2005. The average slaughter weight ranged from 350 to 380 kg/head (Annex 3). In Romania there are no stock-breeders specialising in beef production, only cross-breeds such as the local Baltata Românească and the Brown breeds.

Of the total beef produced, 27% is for on-farm consumption, 34% goes to processing and 39% is directly sold on the local market. The demand for beef is low but increasing. Beef consumption per capita increased from 6.7 kg in 2000 to 10.2 kg in 2004, accounting for about 16% of the total meat consumption per capita.

Over the period 2000-2005, exports of beef (fresh or refrigerated) increased significantly by 445%, from 166 tonnes in 2000 to 904 tonnes in 2005. Between 2001 and 2004, imports of beef more than halved from 11,500 tonnes to 5,463 tonnes before recovering greatly in 2005.

Pork

Although there was a 38% increase in the national pig herd between 2000 and 2005 - from 4.8 million to 6.6 million (Annex 5) - liveweight pork production fell by about 9%, from 670,000 tonnes in 2000, to 605,000 tonnes; equivalent to 454,000 tonnes carcase weight (Annex 3).

The demand for pigmeat remains high, accounting for 46.1% of total meat consumption and 29.2 kg/capita in the year 2005, compared to 21.8 kg/capita in 2000. Until 1997 Romania was a net exporter of pigmeat, imports being insignificant. As a result of trade liberalisation in 1997, imports of carcase pigmeat have increased such that Romania is now a net importer of pigmeat with a 212,600 tonnes deficit on external trade in 2005. Over the period 2000 to 2004, exports of pigmeat (fresh or refrigerated) were relatively constant at around 300 tonnes per year, increasing to 484 tonnes in 2005. The main causes of this development were the decline in domestic pork production and the processors' preference for higher quality imported pigmeat.

Sheep and goat meat

Until 1990, Romania led Europe in sheep and goat breeding with a total herd of 17.3 million. Since then there has been a decline, the number of livestock falling sharply by more than half to 7.6 million in 2005, of which 99% belonged to the private sector (Annex 5). Sheapmeat production in liveweight terms was relatively constant, totalling 116,000 tonnes in 2000 and 114,000 tonnes in 2005, except for 2003 and 2004 when it reached 135,000 tonnes and 166,000 tonnes respectively (Annex 3). In the period 2003-2004 liveweight meat production increased due to the increase of opportunities for export to EU countries by the removal of tariff quotas for this product. In the year 2005, some traditional trade partners from the Arab countries and Greece were lost, this leading to the diminution of liveweight meat production.

Sheepmeat has a seasonal demand pattern (at Easter and in Autumn) with 45% of total production sold directly to consumers or via local markets). The lack of specialized slaughterhouses constrains the sale of meat in carcase form. Consumption in the farm household accounts for 43% of production and only the remaining 12% goes for processing. Mutton consumption is quite modest and fluctuated only slightly, ranging from 2.3 kg/capita in 2000 to 3.3 kg/capita in 2004, while in 2005 it decreased to 2.6 kg/capita.

Romania's once-significant export of live lambs and young male sheep - mainly to the Arab countries - has decreased as a result of closing down the large industrial fattening units. In 2002 exports of live sheep totalled 1.5 million and 1.9 million in 2005, of which 88% went to Bulgaria, Croatia and the European Union (mainly Hungary, Greece, Italy and France) and 12% to Muslim countries.

Poultry meat

In 2005, the numbers of poultry livestock had increased by 24% (to 16.5 million birds) since 2000, possibly as a result of the premiums received from the state budget for the meat delivered to the market. An increase in domestic poultrymeat production consequently occurred with liveweight poultrymeat production increasing by 26% from 324,000 tonnes to 401,000 tonnes in 2005 (Annex 3). Own-consumption accounts for 33% of total poultrymeat production and 67% is sold at market. Poultrymeat consumption increased significantly from 12.1 kg/capita in 2000 to 21.2 kg/capita in 2004.

The volume of poultrymeat exports (fresh or refrigerated) has shown an increasing trend, from 825 tonnes in 2000 to 6,251 tonnes in 2005. 84% of exports went to the European Union countries (mainly The Netherlands, UK, France and Germany). Imports have followed a similar pattern. In 2005 poultry imports totalled 160,800 tonnes, representing 7.4 kg/capita (one-third) of the population's average consumption. Of the imported poultry meat about 25.1% comes from EU countries (Germany, The Netherlands, Italy, UK and Belgium), 48.3% from the USA, 25.2% from Brazil and 2,4% from Canada. The imports from the USA do not fully comply with the EU sanitary-veterinary norms and it is expected that these imports will be stopped following Romania's Accession to the EU. Romania is a net importer of poultry meat with an increasing external trade deficit.

The Slaughtering and Processing Industry

In 2004 the slaughtering and processing industry consisted of 1123 enterprises, with around 30,000 employees. The main companies are as follows, ranked according to turnover:

1. Agricola International SA
2. SC Aldis SRL
3. SC Recunostinta Prodcom Impex SRL
4. SC Elit SRL
5. SC Tabco-Campofrio.

All five companies have strong positions in the market for processed meat products, although some of them are also among the largest companies in the red meat products sector. The concentration of the sector is still relatively low: in 2004 the 5-firm concentration ratio was only 18%, while the 20-firm ratio was 43%.

Of the investments made in this sector in 2004, three quarters by value went to medium and large-sized units with more than 50 employees, with 8 of these units employing more than 250 employees. Almost 74% of the investments were self-financed, while the remaining 26% required credit (mainly domestic) and other sources such as foreign capital and state support.

In 2005, 794 processing factories/plants and slaughterhouses in the meat industry were subject to the monitoring process, of which:

- 738 units were in red meat processing;
- 52 units were in poultry meat processing;
- 4 processing units for meat of game birds and animals

The units producing **red meat** are classified into four categories, A, B, C and D.

- Category A includes units complying with EU requirements. There are 14 units included in this category.
- Category B includes units under restructuring and modernisation prior to Accession. There are 134 units included in this category.
- Category C includes units listed for the transition period with the legal right to trade their products on the domestic market up to 1 January 2010. There are 25 units included in this category that have a restructuring programme negotiated for the transition process.
- Category D includes units with no restructuring programme. These are the units re-classified from categories B or C that have not designed a restructuring and

modernisation programme, as well as units that do not comply with the hygiene norms or those considered to not be suitable for modernisation and restructuring.

In the poultrymeat sector 52 units are subject to the monitoring process, of which 15 are in category A, 9 in category B and 2 in category C. The 26 units in category D whose production is destined for direct sale to final consumers in local markets will be closed down if they do not comply with the stipulated hygiene conditions.

Consumers' health is at risk because the majority of the small-scale slaughtering and meat processing units do not comply with the EU hygiene and quality standards. This is largely due to the fact that it is difficult to impose quality control on a meat sector that produces at an almost subsistence level. The large meat processors are confronted with a fluctuating and low quality agricultural supply, as most animals (80% of herds) are raised on small-sized household farms, lacking high quality genetic material, while feeding is not based upon adequate feed rations. At the same time, the large processors prefer to import pork and poultry meat, at better prices and quality than buy the meat from the domestic market. At present, the low number of certified laboratories meeting EU standards is constraining the opportunity of transforming the export sales of live animals into carcase sales or sales of processed products (sheep, bovines).

3 Policy and standards

Prices

In the year 2005 compared to 2004, the average meat procurement prices significantly increased, except for live weight sheep meat (Annex 6).

In the year 2005, the average *beef* procurement price was 0.91 euro/kg liveweight, with differences between various animal categories. Thus, the meat price for adult bovines for slaughtering was 0.7-0.8 euro/kg live weight, while the price for young male bovines with a weight of 150-380 kg was 1.2-1.4 euro/kg, while the price for young male bovines over 380 kg was 0.9-1.1 euro/kg live weight.
Compared to previous year, in 2005 the *pork* price was up by 34%. The supply of live pigs is unstable and of poor quality, which explains the price fluctuations in the period 2001-2005.
Except for 2005, when the average procurement price for *sheep meat* was equal to or slightly under the price for the other categories of meat, in the investigated period this ranged from 1.1 to 1.3 euro/kg liveweight. In 2005, the average producer procurement price for chicken was 1.1-1.5 euro/kg live weight.

In the period 2000-2005, Romania experienced an economic growth and the inflation rate decreased. (Annex 7)

In the year 2005, the consumer *beef* price ranged from 1.9 to 2.1 euro/kg carcass weight and from 2.7 to 2.9 euro/kg deboned leg, the consumer *pork* price ranged from 1.7 to 2.2 euro/kg carcass weight. The pig carcass had significant differences as regards quality, which also determined these price variations. On the domestic market, the price of *young male sheep* carcass was 3.0-3.3 euro/kg in 2005. In the year 2005, the average price of "griller" type *poultry meat* at slaughterhouse gate ranged from 1.6 to 1.8 euro/kg, the consumer price reaching 2.0-2.3euro/kg.

Due to the outbreak of avian flu in 2006 the market price for poultrymeat was equal to or lower than the production price. Poultrymeat producers were confronted with meat stocks in the storage houses and suffered significant losses. This situation is likely to have a negative impact upon the poultrymeat sector and production in the current year.

Subsidies

Between 2002 and 2004, the subsidies given to beef, pig meat and poultry meat delivered to slaughterhouses led to increased production and livestock numbers in each sub-sector (Annex 8).

Subsidies for sheep were directed towards the reproduction sector at rates of 150 000 ROL (4 €) for artificial insemination, 50 000 ROL (1.3 €) per naturally mounted sheep and 150 000 ROL (4 €) per ram used for natural mounting.

According to Government Decision no. 1853/December 2005, starting with January 2006 the subsidy of 28 € for pig breeders was received per animal head (and not per kg).

The domestic financial support in 2007 was 124 million €, out of which:

- Complementary National Direct Payments 35 million €:
    - Annual premium per ton of milk (for the farms having the milk quota)
    - Premium per head for the suckling female animals
    - Premium per head for the young female bovines raised for meat
    - Premium per head for slaughtering animals (bovines)
    - Premium per head for sheep, goats (at lambing)
- Improvement of breeding quality and of animal production quality: 89 million EUR

Under Measure 1.1 of the SAPARD programme regarding the 'Improvement of processing and marketing of agricultural and fishery products' that commenced in July 2002, a total of 212 projects have been approved, and by September 30, 2005, €126.8 million of public funds had been spent. The completed projects account for 39% of the total SAPARD budget or 61.9% of the budget for the period 2000 – 2004.
102 projects were approved for the sub-measure 'Meat and meat preparations' alone, with a value of €151.8 million, of which half (€75.9 million) was publicly funded. Overall, the meat processing sector attracted 60% of the SAPARD funds allocated to Measure 1.1. and 48% of the total number of projects.

The main expenditure - 47.5 % of the total value - is for capacity enlargement projects while plans for more efficient utilisation of existing facilities represent 39.2%. The improvement of storage capacities accounts for 7.2% of the allocated funds while just 1.1 % has been used for adaptation to EU standards.

Implementation of standards

For the satisfactory operation of the meat industry in Romania, it is necessary to fully implement the EUROP classification system for pig, beef, veal, sheep and goat carcases to conform with the EU provisions. This will facilitate domestic and foreign trade activities with carcases, the monitoring of red meat activities in EU, the purchase of carcases under the intervention schemes and the permanent improvement of fresh meat quality. Thus from 2006 the EUROP system has been implemented for the classification of beef, pig and sheep carcases. See Annex 5

4 Market trends and perspective for meat consumption

The average meat consumption per capita in Romania decreased from 50.2 kg in 1989 to 44.8 kg in 2001, then the trend and by 2005 reached 63.3 kg. Compared to the average consumption of the EU (96 kg/capita) there is still a significant gap.

The economic growth process initiated in the year 2001 increased real incomes. Thus, in the year 2005 compared to 2000, the real wages were18.9% higher, while the real pensions increased by 19.3%. This increase in the population's purchasing power was the main cause of the increase in the meat consumption from 44.8 kg/capita in 2001 to 68.3 kg/capita in 2005. The meat consumption structure by meat categories reveals Romanians' preference for pork (46%), followed by poultry meat (33%), beef (16%) and other categories (4%).
Even under these conditions, meat consumption is lower than in the other Eastern-European countries, hence the market has growth potential.

Pigmeat and poultrymeat are eaten in the greatest quantities. The demand for pigmeat represents 46.1% of total meat consumption and increased from 21.8 kg/capita in 2000 to 29.2 kg/capita in 2005; poultrymeat consumption was 21.2 kg/capita in 2005, accounting for 33.4% of the total.
The demand for beef is quite low, but increasing: beef consumption per capita was 10.2 kg in 2005, representing about 16% of the total meat consumption per capita.
Sheep and goat meat consumption was up from 2.3 kg/capita in 2000 to 3.3 kg/capita in 2004 but fell to 2.6 kg/capita in 2005.

A higher preference for meat consumption as a proportion of total agri-food consumption is evident in the South (18%) and North-East (17.7%), followed by the North-West and Central regions (with 13% each). In terms of the break-down of consumption, there is a common preference for pork and poultry meat. Preferences for different meat types vary across the country, mostly for sheep and goat meat where the highest shares of consumption are found in the South-East regions with Greek and Turkish influences and the Central region which has a sheep-breeding tradition.

Meat consumption is expected to increase in the future and approach the consumption levels of the EU member states, mainly due to the increases in the population's incomes. This increase will be mainly focused on a higher demand for pig and poultrymeat. However, domestic production will not be able to cover this increasing demand which will have to be supplied from imports.

5 Recent evolutions and perspectives for the trade

Over the last 6 years the overall Romanian foreign trade balance in meat has been in deficit due to the pork and poultry meat imports where the balance of trade has been consistently negative. There has been a surplus on the trade balance for cattle and sheep, mainly due to the export of animals for slaughtering. There has been very little change in the geographical composition of Romania’s pigmeat exports and imports.

Exports

Agri-food products are an important element of exports by value. In 2005 exports of live sheep and cattle were €73.8 million (11% of total exports) and €59.4 million (9% of total exports) respectively. The main destinations being Croatia followed by Greece. The exports primarily consist of live fattened calves for slaughtering.

Beef exports were insignificant, in spite of a tariff quota guaranteed by the EU, because only a relatively small number of slaughterhouses are accredited for exports to the EU. The trade balance for beef is negative in 2004 imports reached 4091 tonnes with exports of only 552 tonnes to the EU (Germany 14.5%, Hungary 10.2%, Spain 6%, etc.).

Romania had a good tradition in the export of live animals (sheep), mainly to the Arab countries, before 1989. In recent years, sheep were also exported to the European market (Greece, Italy, Bulgaria, etc.). However, the sheep exports fluctuate every year depending on the trade partners and market conjuncture.

In the period 2000-2004 poultrymeat exports rose from 825 tonnes to 3800 tonnes in 2004 and 84% of these went to EU countries.

Imports

Fresh refrigerated and frozen pigmeat was the main import in 2005 at €312 million representing 213,075 tonnes by volume. This was 15% of total meat imports in 2005, compared to 11% in 2004. Pigmeat imports place Romania sixth in the world list of pigmeat importers[1]. This makes Romania an attractive country for investment in this sector or a favoured destination for pork exports. In 2005 poultrymeat imports totalled 160.8 000 tonnes.

Of the total imported, about 25.1% comes from EU countries (The Netherlands 7 000 tons, Belgium 3 000 tons, Hungary 2 000 tons, etc), 47.3% from the USA, 25.2% from Brazil and 2.4% from Canada.

6 Expert views on the successes and challenges of the sector

As long as domestic prices are higher than import prices and the quality of meat remains lower, meat imports will continue to be high. Following EU Accession the structure of imports will change: imports from the rest of the EU will displace those from North and South America.

In the short term no important changes are expected in the beef market due to the low demand for beef on the domestic market and also limited export demand. In the long term, due to the advantages of breeding cattle in natural conditions, organic farms may emerge with aim of exporting beef products.

[1] According to USDA reports

The preference for imports or for domestic production will continue to be determined by relative prices and quality. The increase in pig numbers expected to take place over the next 3-5 years due to both foreign and domestic investment, should contribute to a reduction of pork imports. Romanian pig producers benefit from supplies of cheap grain (however unstable this may be) as well as to the existence of cheap labour.
As long as domestic demand for sheep and goat meat remains low, no changes are expected. In the medium- to long-term investment in this sector will largely depend on the foreign demand for sheep and goat meat.
At present, the low number of slaughterhouses certified according to EU standards is constraining the opportunity to transform the exports of live animals into carcase sales or exports of processed products (sheep, cattle).

7 Conclusion

The main difficulties of the meat sector in Romania are as follows:

At production level:

- production is quite fragmented into a large number of small farms, the average animals per farm being 2.4 cattle, 2.9 pigs, 9.1 sheep and goats and 28 poultry;
- precarious shelters for animals that adversely impact upon animal welfare;
- insufficient capital for acquiring high-quality breeding stock;
- Poor quality feeds, and low feed conversion, resulting in high unit costs.

At processing level:

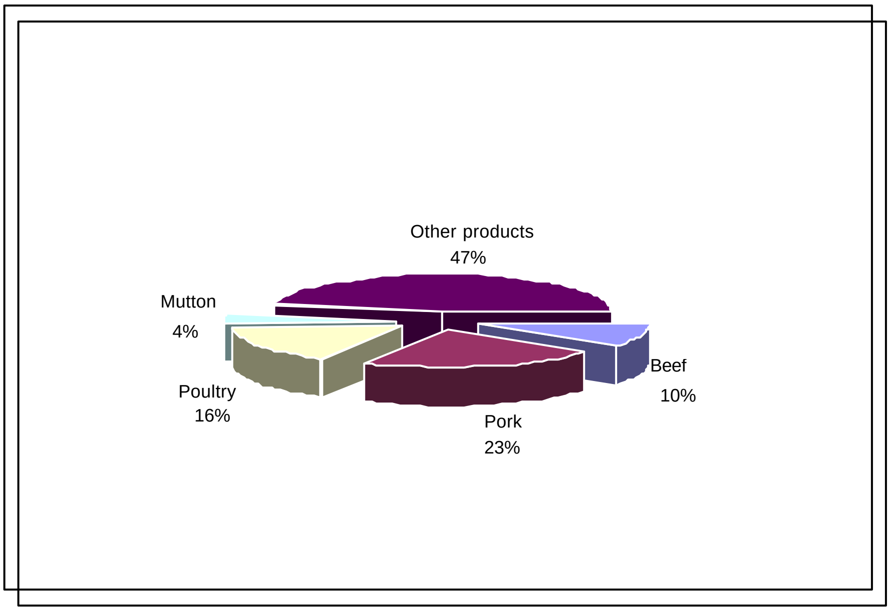
- the high proportion of subsistence farming and self-sufficiency constrains market development;
- the lack of a payment system based on carcase quality;
- low quality carcases;
- low level of investment;
- low number of slaughterhouses and processing units that comply with EU requirements.

At distribution and marketing level:

- low hygiene standards in the distribution and sale of products;
- insufficient domestic production and unsatisfactory quality has led to an increase in meat imports and a decrease in meat exports, making Romania a net importer of meat and meat preparations.

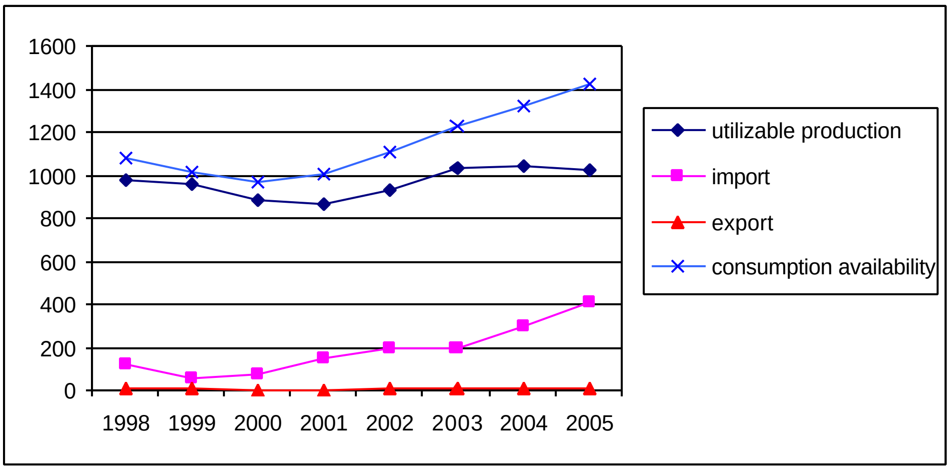
Annex 1:

Share of meat production in livestock production value in 2004



Annex 2:

Balance of meat and meat products supply in carcass equivalent

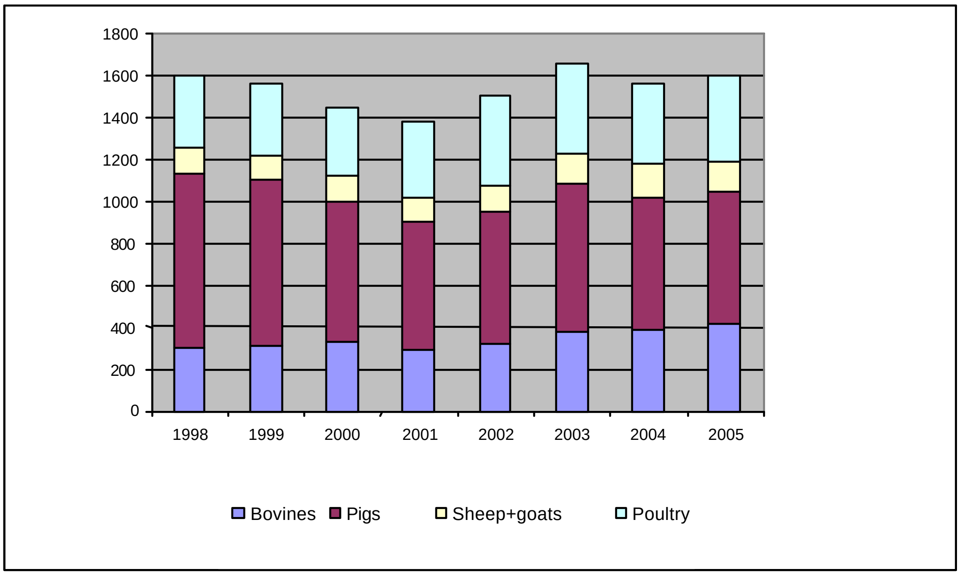


Source:Food balance by products, 1999-2005, NIS

Annex 3:

Evolution of meat production, 1998-2005

Thou. tons liveweight



Source: Romania's Statistical Yearbook, 1999-2005, NIS

Annex 4: Country profile for sheepmeat and goatmeat

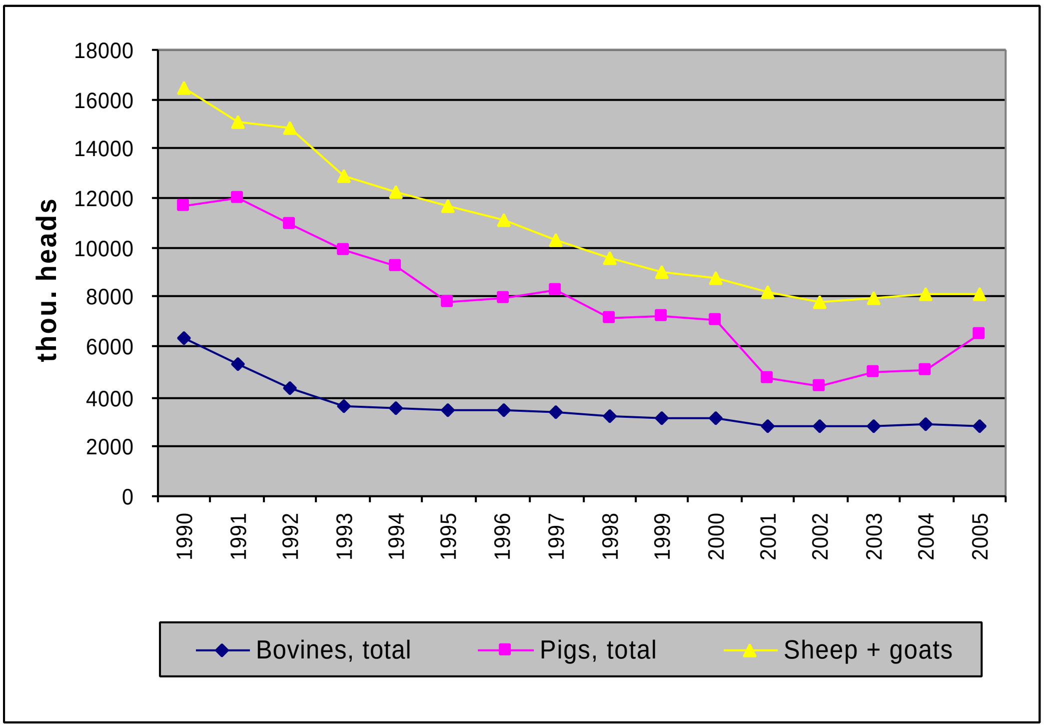
Evolution of processed meat production in the perioad 1998-2005

Thou. tons

	1998	1999	2000	2001	2002	2003	2004	2005
Processed meat,	496	374	362	354	373	429	486	582
Out of which:								
Meat preparations	125	129	147	152	169	204	254	290

Sursa: Romania's Statistical Yearbook, 2000-2006, NIS

Graph 1. Evolution of livestock herds, 1990-2005



Source: Romania's Statistical Yearbook, 1991-2005, NIS; Information bulletin on the livestock herds in 2005, NIS, 2006

Annex 5: Implementation of EUROP System

The implementation of the EUROP system for pig species that began in March 2006 will conform to the Technical classification norms for pig carcases. For the sheep and bovine species, the classification of carcases began in June 2006 according to the Technical classification norms for sheep and bovines respectively.

According to the Technical classification norms of bovine carcases, the carcases and semi-carcases from animals slaughtered in authorized slaughterhouses that bear a health proof mark are classified and identified to comply with these standards. The application of the provisions from the technical norms is obligatory for all the slaughterhouses authorized for export to the European Union, but it is not obligatory in the following cases:

- slaughtering units that slaughter less than 20 adult bovines/week on average;
- retailers who buy live animals that are slaughtered for them on contract basis.

The technical norms for the classification of sheep carcases have been applied on an optional basis starting June 1, 2006.

From March 1, 2006, the subsidies received by pig producers will be conditional upon the drawing up and implementation of the programme regarding the biosecurity norms in the authorized units, according to the terms established by the current legislation. The subsidies will not be received for the quality classes R, O and P.

The objectives of the EUROP system may be summarised as follows:

- a unitary system of carcase assessment;
- payments to producers;
- defining the commercial value at slaughtering level;
- establishing price in relation to carcase quality;
- orienting the producer price;
- introducing certain meat market regulation measures;
- promoting intra-EU trade in meat.

In the livestock raising policy, an important objective has been to establish a system of animal identification and registration that is functional and compatible with the EU standards and requirements. Its aim is animal traceability, starting with the farm of origin, until the product reaches the consumer. After Accession, information on animal origin should also appear on labels.

Annex 6: Average meat procurement prices (€/kg live weight)

Specification	2001	2002	2003	2004	2005
Beef	0.82	0.84	0.63	0.64	0.91
Pork	1.15	1.10	0.88	0.96	1.29
Sheep and goat meat	1.34	1.30	1.26	1.09	0.91
Poultry meat	1.03	0.89	0.77	0.77	1.04

Source: own calculations based upon data from Romania’s Statistical Yearbook, 2006, National Institute for Statistics

BNR exchange rate: 2001: 1 RON=2.6027 €; 2002: 1 RON=3.1255 €; 2003: 1 RON=3.7556 €; 2004: 1 RON=4.0532 €; 2005: 1 RON=3.6234€

Annex 7: Consumer price indices

Previous year = 100

Specification	2000	2001	2002	2003	2004	2005
Consumer price index	145.7	134.5	122.5	115.3	111.9	109.0
Food commodity price index	143.7	135.7	118.3	114.7	109.5	106.1
Beef	138.4	168.9	123.3	102.2	106.6	115.3
Pork	151.8	176.9	117.9	98.0	109.1	113.9
Poultry meat	153.0	150.3	106.2	102.3	109.3	108.3

Source: Romania's Statistical Yearbook, 2006, National Institute for Statistics

Annex 8: Subsidies allocated for the meat delivered to slaughterhouses in €/kg live weight

Subsidies	2002	2003	2004
Beef	0,13	0,18	0,18
Pig meat	0,13	0,18	0,19
Poultry meat	0,09	0,1	0,17

Annex 9: The main important categories for pig meat imports

	TOTAL		Imported from:		
	Tonnes	Total value (thousand €)	Main importing countries	Tonnes	Value (thousand €)
Other varieties	96024	161617	Germany	29405	44309 000
			France	13344	22668 000
			Denmark	6428	11817 000
Fresh or chilled pig carcases or semi-carcases	37386	60033	Poland	10722	16876 000
			Austria	3498	4881 000
Ham, shoulders and cuts thereof, deboned	58500	91621	Canada	23910	37835 000
			USA	16370	25882 000

Source: INS

Annex 10: Import of animals by the main suppliers

	Main importing countries	**Value (thousand €)**
Pure breed reproduction animals from the bovine species		
	The Netherlands	3003
	Austria	1747
	Germany	1209
	Main importing countries	**Value (thousand €)**
Pure breed breeding animals from the pig species		
	Great Britain	2160
	Poland	481
	Denmark	347
	Main importing countries	**Value (thousand €)**
Other live animals from the pig species under 50 kg		
	The Netherlands	4733
	Hungary	2337
	Main importing countries	**Value (thousand €)**
Other live pigs of 50 kg or over		
	Hungary	2986

Source: INS

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