

# Traditional Foods Market. Evolution, Concentration, and Growth Potential in Romania

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**Abstract**

Traditional products represent an opportunity for the Romanian producer and a market niche which can be accessible at European and national level. This paper puts forth an analysis of the Romanian potential in the development of the traditional products, an evaluation of the degree of concentration and of the factors of market influence. The study used information provided by governmental organizations, national and European statistical database. The collected data was processed, graphically represented and analyzed. Herfindahl-Hirschman and Gini-Struck indexes were used to analyze the market concentration. The research results showed an uneven distribution of the traditional products on regions and counties in Romania. The national market is characterized by a high concentration level, most registered products coming from Central and North West regions. The South Est region is modestly represented at national level, but covers roughly 40% of the European traditional registered products in the eAmbrosia database. The local investors' entrepreneurial spirit is a more important factor than the tradition in the development of the traditional foods. In Romania there is an insufficiently capitalized potential for the development of the traditional foods. The analyses performed is useful to the business environment and the

**Keywords**

traditional, food market, market niche, Gini-Struck, HH Index, Romania

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**Introduction**

The quality and diversity of food production represents one of the strengths of the national cultural and gastronomic patrimony. The development and the promotion properly accomplished can represent a competitive advantage for the Romanian producers and leads to substantial revenues for small companies (Stanciu, 2014). The traditional products entered a fierce competition on a national food market dominated by supermarkets and industrial products contested for high levels of additives, lack of quality or originality (Stanciu et al., 2019a, Stanciu at al., 2019b). The majority are not known to the Romanian consumer who prefers imported foods, more easily to procure from big marketplaces, better promoted and, more often, cheaper (Stanciu, 2015).

**1. Materials and Methods**

Articles from Clarivate Analytics database, SCOPUS, Google Scholar and Research Gate were used for the bibliographical references, accessed based on institutional accounts. The legislation in the food field and the traditional products was selected from EUR-Lex, European Commission's press releases, the European Parliament, the Romanian Government, the Ministry of Agriculture and Rural Development, the Ministry of Health and National Consumer Protection Authority and other institutions, European or national. For the recording of the local producers and the registered traditional products the registrations of the National

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Register of Traditional Products published by the Ministry of Agriculture and Rural Development and information given by the National Institute of Statistics were used. The collected data was organized and statistically processed using tables and market concentration index, adapted for traditional products. The results obtained were compared to others from specialized literature for validation.

## 2. Results

### 2.1. Traditional food production in Romania

To differentiate industrial products from traditional ones, strict rules were imposed, rules which the traditional producers must obey for attestation (Gheorghe et al, 2013). Starting with 2014, traditional products must meet the requirements imposed by the joint order of the Ministry of Agriculture and Rural Development, the Ministry of Health and National Consumer Protection Authority regarding the attestation of the traditional products (2013). If until 2014 there was a permissive legislation which allowed easy registration for more than 4000 products, a lot of which accomplished by industrial producers, after the changes to legislation, the rules became stricter, the control procedures more severe, and after October 2014 almost 90% of the products declared as traditional did not receive the necessary certification (MADR, 2015). According to Guidelines on registration of traditional products, issued for the appliance of Order no 72/2013 the traditional product is defined as being manufactured on national territory from local raw material, without food additives in their composition, using a traditional recipe; a method of production and/or processing and a traditional technological procedure and different from other similar products belonging to the same category (MARD, 2014). After regulations, the specific conceptual terms of traditional production and industrial production were very clearly determined, thus the number of artificial products registered at national level being reduced. For recognition the description of the methods of specific production place, authentic and invariable, as well as the description of the traditional technological process, with all its phases of production, including the ones manually realized, were asked for. Being about higher quality products, stating the organoleptic and physic-chemical elements and the production or manufacturing process which would reflect a traditional technique, through which the product can be differentiated from another product from the same category, was imposed (Petrescu et al, 2018). The task book must include a story and a historic of the product, and many other aspects for the product validation.

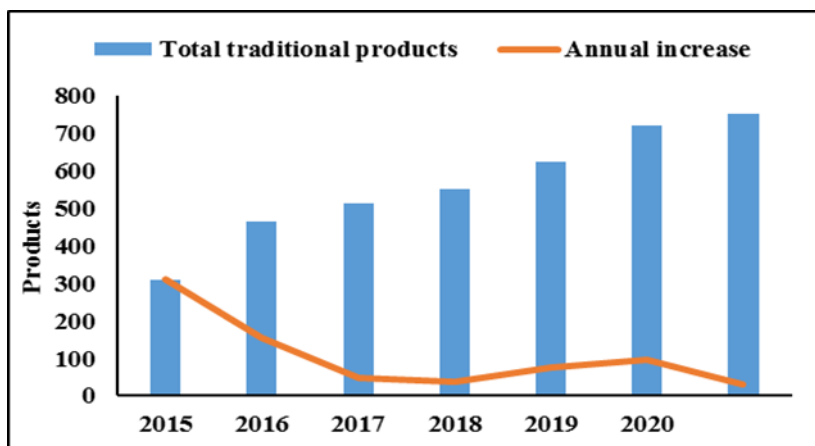
The certification of the traditional products represents the recognition of the traditional nature, in accordance with the applied legislation. The certified products are included in the National Registry of Traditional Products NRTP published by MARD (MARD, 2021). Starting with April 1st 2020 the provisions of the Regulation (EU) 2018/775 to establish the implementing rules of the article 26 paragraph (3) from Regulation (EU) no. 1169/2011 of the European Parliament and Council with regard to the information supplied to the consumer concerning the country of origin of the primary ingredient of a food, is applied in Romania, too. The producers/ manufacturers/ importers of food products have the obligation to provide complete information by specifying the country of origin or the place of origin of the primary ingredient, alongside the other mandatory information regarding the labelling of the food product. The consumers can be assured of the product authenticity and quality and so can choose local products (Kapelari et al., 2020). Purchasing traditional Romanian products, they can contribute to the preservation of the national cultural heritage values and to the development of the local economy (MARD, 2020a). Traditional products can be registered upon voluntary quality schemes which target certain technical specifications of the food products.

The benefits of the certification/ registration/ recognition based on these quality schemes are given by the promotion opportunities and European market entering, accessing European funds, facilitating the participation in “Enjoy, it’s from Europe” program; making European consumers aware of the quality of the traditional Romanian food products; participation in global value chains and adding component services to the product; conservation and protection of the environment etc. (Stanciu, 2014; EC, 2018).

The Ministry of Agriculture and Rural Development reaccredited in 2014 the certification of 309 traditional products according to the Order 724/2014 (MARD, 2020c). In 2015 there were 474 products registered, which grew to 750 in 2020.

The players involved in the image consolidation of the traditional product on the Romanian market are The National Federation of Producers of Traditional Products and the profile Associations from the country; MARD, through specialized authorities); County Agricultural Authorities through specialized authorities; NACP with its county offices for consumer protection; HM. At the certification of the product, the producer receives a certificate “Certified Traditional Product”, but this does not exonerate the economic operator from the responsibility regarding the manufacturing and the merchandising of the traditional product. The certificate keeps its validity as long as the economic operator fulfils the criteria and requirements for which

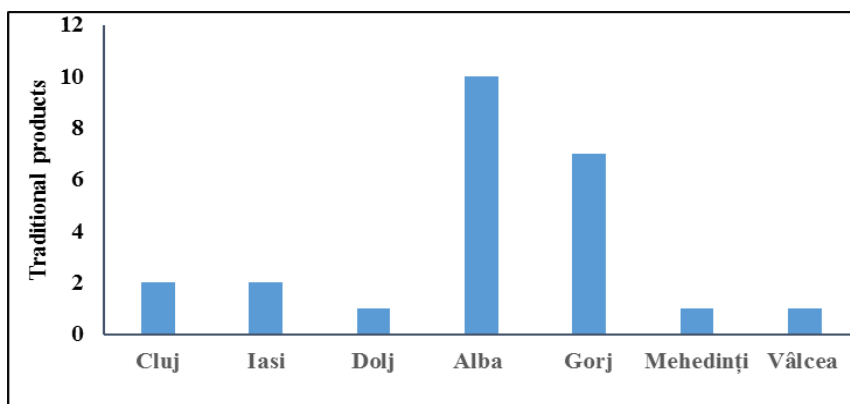
the certificate was released. The evolution of traditional products registered annually at MARD in NRTP is presented in figure no. 1.



**Figure no. 1. Traditional products registered in NRTP**

*Source: Author, by using MARD, 2020d*

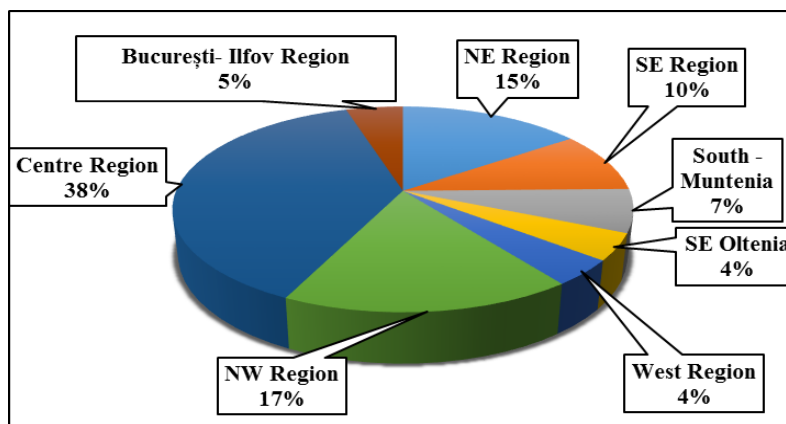
During the period evaluated, the annual median rate of registration of traditional products at national level was about 70 products/year, being relatively moderate in the last few years. In 2020 there were registered only 29 certificates for traditional products, more than 60% being attributed to producers from Alba and Gorj Counties (figure no. 2).



**Figure no. 2. County distribution of products registered in NRTP**

*Source: Author, by using MARD, 2020d*

Until this research there has not been registered any traditional products originated from the South-East Regional Development Counties. The distribution of the registrations of traditional products between 2014-2020 in NRTP, on development regions of Romania, is presented in figure no. 3.



**Figure no. 3. Products registered in NRTP by regions (2014-2020)**

*Source: Author, by using MARD, 2020d*

The total number of traditional products in absolute values and the regional distribution is presented in Table 1. To measure the market concentration, Roberts (2014) recommends to apply Herfindahl-Hirschman analysis, based on concentration index HHI. HHI is calculated by the square sum of market shares of all sector factors. In this case, HHI represents a value of the way in which a small number of regions can represent a big share of the traditional products market.

The higher the HHI market value, the more the production is concentrated in a small number of factors. In general, when the HHI value is below 1,000, the market concentration is considered low; when the index is between 1,000 and 1,800, the market concentration is considered median, and when the HHI value is over 1,800, this is considered high (Competition Council, 2020). The HHI is calculated using formula 1, recommended by Săvoiu, Crăciuneanu și Țaicu (2010) and applied by Stanciu et al. (2015), to evaluate the concentration value of meat products market in Romania.

$$HHI = \sum Gi^2 \quad (1)$$

where  $N_i$  - number of products  $i$ ,

$N$  - number of products, and

$G_i$  - the weight of the product  $i$ , calculated according to Table no.1.

According to the data presented in Table 1, HHI takes the value 2179.34, which proves a high value of concentration of the traditional products market at national level. Over 55% of the traditional products registered in NRTP come from just two Romanian regions, respectively NW and Centre Region.

**Table no. 1. Distribution and share of traditional products by Romanian Regions**

Region	Registered Products ( $N_i$ )	$G_i$ (%)	$G_i^2$
NE Region	112	15.20	230.941014
SE Region	70	9.498	90.2113338
South - Muntenia	50	6.78	46.0261907
SE Oltenia	31	4.21	17.6924677
West Region	30	4.07	16.5694286
NW Region	128	17.37	301.637243
Centre Region	281	38.13	1453.70961
Bucharest - Ilfov Region	35	4.75	22.5528334
Total	737	100.00	2179.340132

Source: Authors, by using MADR (2020d)

A verification of the concentration value of the market of traditional products can be carried out by means of the Gini-Struck Index (GSI). GSI is calculated by using the formula recommended by Săvoiu, Crăciuneanu și Țaicu (2010), showed in formula 2.

$$GSI = \sqrt[3]{\frac{N \sum Gi^2 - 1}{(N-1)}} \quad (2)$$

If the GSI value tends to 1, this indicates a high value of market concentration and if the value of the coefficient tends to 0, it indicates a low concentration value of the structure of the analyzed market. The application of formula 2 leads to a value of  $GSI = 0.33$ , respectively a high value of market concentration.

## 2.2. Traditional products in the South-East Region of Development of Romania

The distribution of traditional products registered on South-East Regional Development County, between 2014-2020 is shown in Table 2. Buzau and Tulcea, with 39, respectively 20 traditional products certified between 2014-2020 take the first places at regional level, and concentrate over 84% of the total traditional products from this part of Romania. In 2020 there were no traditional products registered in the NRTP coming from this region, the maximum number being registered in 2014 when 22 products were approved through the regularization of the profile market.

Through the registered traditional products perspective, with only one traditional product registered, Braila county with "Bors de putina" (Other products category, 2015), respectively Constanta with "Ghiudem taranesc Mos Iosif" Meat products category (2018), take the last place in the regional classification. In Vrancea County there were registered three traditional products from "Bread, bakery products and pastries" category, belonging to the Bogart Design LLC company (2017), respectively Motareschi Eugenia Individual Enterprise (2018) and Rustic Pani Grig LLC (2018). Galati County is represented by 7 traditional products in "Meat and Meat products" category, registered by two local producers: DRU AGRO LLC (3 certified products in 2014), respectively Verdesi &CO LLC (4 products in 2019).

**Table no. 2. Traditional products on SE Region by County (2014-2020)**

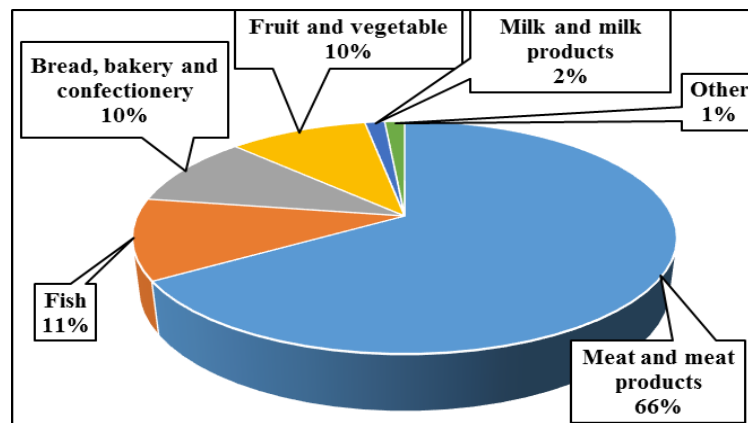
County	2014	2015	2016	2017	2018	2019	2020	Total
Brăila	0	1	0	0	0	0	0	1
Buzău	11	2	0	3	8	15	0	39
Constanța	0	0	0	0	1	0	0	1
Galați	3	0	0	0	0	4	0	7
Tulcea	8	0	0	6	6	0	0	20
Vrancea	0	0	0	1	2	0	0	3
Total	22	3	0	10	17	19	0	71

Source: Authors, by using MADR, 2020d

In Buzau 39 traditional products were certified, all in “Meat and meat products” category, registered by 8 producers: “Gabioti traditional products from Plescoi” – 11 traditional products (2014); “Ghizdeanu Victoras Authorized Natural Person” – 2 traditional products (2015), Traditional Popa Carm LLC – 3 products (2017), 8 in 2018 Roxana Com LLC (3), David Prodcom Panif LLC (1), La Bunica Gina LLC (3), Macelaria Veche LLC (The Old Butchery) (1), and in 2019 there were certified 15 products Macelaria Veche LLC (The Old Butchery) (6), respectively Global Pro Carm LLC (9).

The main categories of registered products in Tulcea County were registered by three producers, respectively for “Fish”, Miadmar HDP LLC registered 8 products in 2014; at “Fruit-Vegetable” category there were 7 products registered by SC PICCOLO ANGELO SRL (5 products in 2017 and 2 products in 2018), which also has 4 traditional products from “Bread, bakery products and confectionery” category (1 product registered in 2017 and 3 products registered in 2018), respectively “Milk and dairy products” category, with goat feta cheese registered in 2018 by Migit H. Nicolae ANP.

In the SE Region the agents show a small interest in registering traditional products, just 18 companies and natural people being authorized as traditional producers. Mainly requests for products from “Meat and meat products” category was addressed for certification, which represents more than 66% of the total at regional level (figure no 4). “Fish”, “Fruit and vegetable” and “Bakery – confectionery products” are domains in which the region is better represented.



**Figure no. 4. Traditional products in SE Region, by categories**

Source: Author, by using MADR, 2020d

### 2.3. Romanian traditional products registered at European level

In Romania there could be registered a number of food products which have potential, taking into account the fact that there is a vast heritage and interesting traditions of production and consumption, which could be the basis of some successful promotional campaigns (Voinea et al., 2020). Unfortunately, the local producers have lacked the inspiration and the experience necessary to make the most of the existing potential at national level (Butu et al., 2020). In the database eAmbrosia, the European Register of products with geographical specifications, developed by the European Commission EC (EC, 2021), the traditional producers from Romania have registered so far only 69 products, representing less than 8% from a total of 3,330 products certified on the basis of quality facultative schemes, registered at the European States level. (Figure 5). The best represented Romanian products in eAmbrosia are spirits (wine and distilled spirit), representing 87% of the total certified/in the process of being certified.

**Table no. 3. Certified traditional products, on SE Region Counties (2014-2020)**

No.	Product	Category	Product code	Type
1.	Salam de Sibiu (Sibiu salami)	1.2 Meat products (cooked, salted, smoked, etc.)	PGI-RO-01280	PGI
2.	Cârnați de Pleșcoi (Pleşcoi sausages)	1.2 Meat products (cooked, salted, smoked, etc.)	PGI-RO-02174	PGI
3.	Telemea de Ibănești (Ibanesti Feta)	1.3 Cheeses	PDO-RO-01182	PDO
4.	Telemea de Sibiu (Sibiu Feta)	1.3 Cheeses	PGI-RO-02473	PGI
5.	Cașcaval de Săveni (Saveni cheese)	1.3 Cheeses	PGI-RO-02361	PGI
6.	Magiun de prune Topoloveni (Topoloveni plum jam)	1.6 Fruit, vegetables and cereals fresh or processed	PGI-RO-0763	PGI
7.	Novac afumat din Țara Bârsei (Smoked Bighead carp from Barsa Country)	1.7 Fresh fish, molluscs, and crustaceans and products derived therefrom	PGI-RO-01183	PGI
8.	Scrumbie de Dunăre afumată (Smoked Danube mackerel)	1.7 Fresh fish, molluscs, and crustaceans and products derived therefrom	PGI-RO-02234	PGI
9.	Salată tradițională cu icre de crap (Traditional carp roe salad)	1.7 Fresh fish, molluscs, and crustaceans and products derived therefrom	TSG-RO-2457	TSG
10.	Salată cu icre de știucă de Tulcea (Tulcea Pickerel roe salad)	1.7 Fresh fish, molluscs, and crustaceans and products derived therefrom	PGI-RO-02476	PGI
11.	Plăcintă dobrogeană (Cheese pie Dobrogeana style)	2.3 Bread, pastry, cakes, confectionery, biscuits and other baker's wares	PGI-RO-02510	PGI

*Source: Authors, by using EC, 2021*

From the 11 traditional foods registered at European level, 4 belong to the producers from the South Est Region, all of them from Tulcea County. Even if the South-East Regional Development County of Romania does not take the first places in the national classification, the European certification was more attractive to local producers.

### Conclusions

The paper carried out an analysis of the local traditional products market evolution in a European context. After 1990-2014, a period of time in which the national regulations concerning the traditionality of food products were unclear, with many industrial products declared as traditional, the correlation between the national legislation and the European legislation reduced the number of certified traditional products. At the responsible Ministry level there was created a national registry of traditional products, recommendations and specialized institutions in the accreditation of the producers. Compared to other European states, Romania has a low number of traditional foods registered in eAmrosia database. The national certification as traditional means a preliminary stage before European level recognition. In Centre, NW and NE regions there are registered the most of the traditional products, on a national market characterized by a high concentration value, proved by the high levels on HHI and GSI indexes. In the South-Est region of development of Romania, although there is a major development potential of the traditional products, given by tradition and cultural diversity, there is a low number of registered products. Great differences were noticed between the counties of the region, even though they are geographically close to each other, probably due to a greater number of local entrepreneurs interested in developing these products.

The traditional products may represent business opportunities for the local producers, but there is a need for financial support and legal advice from specialized government agencies. For preliminary identification and promotion there is a need for viable strategies, for a real and well-rounded plan for each region at national level.

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