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FOOD SECURITY Case study IN ROMANIA

Keywords

Food security
Production
Consumption
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JEL Classification

Q11, Q18, L11

Abstract

The increasing world population, the limitation of the natural availability for food production, the climate issues and the food consumption need for modification imposed a continuous updating of the food security concept. Although Romania has sufficient natural resources, which may ensure, by means of proper exploitation, the population's food needs, the lack of a unitary approach at the government level, materialized in the dependence on imports and in fluctuations in the agro-food production, leads to a re-evaluation of national food needs. National food security may be affected by a series of risks and threats, which appeared due to an imbalance connected with the availability, the utility and the stability of the agro-food sector, interdependent elements that must be functional. The present article proposes an analysis of food security in Romania, with a short presentation of the concept in an international context.

Introduction

Food security is a relatively new concept, appeared during the 1970's, in the context of a global manifestation of some food crises (Clay, 2002). It is complex to define the concept, as there are over 200 definitions and about 450 indicators used worldwide in this field (Bajagai, 2015). FAO statistics (2015a) frequently use 4 groups of indicators to characterize the level of global food security, based on the surveys performed at household level.

The international interest in the global food economy, which deals with critical aspects at a global level, such as starvation and food crises, was registered in the declarations of World Food Conference, Rome (United Nations, 1974). The negotiations of the international official bodies at the meeting in Rome, in the field of worldwide food for population, mainly focused on the problem of food supply in adequate quantities, for an accessible price. An analysis of the evolution of food security concept within the period between 1970 and 2002 was performed by Clay (2002, p. 3), who presents the main directions appeared in the documents of international organizations (Table 1). The FAO Declaration at The World Food Summit, Rome (FAO, 1996, p. 2), defines food security as existing „when all the people have physical and economic access at any moment to sufficient, safe and nutritious food, which meets the food nutritious needs and food preferences for an active and healthy life”, bringing new elements as compared to the previous definition: the physical and economic accessibility of all the citizens in the world to food products.

According to the FAO approach (1996), four essential aspects of food security are emphasized:

- ◆ the availability of food – enough quantities of products, supplied by domestic production or imports (including food aids), compliant from the food safety point of view;
- ◆ the accessibility to food – the access of individuals to sufficient resources (economic and physical) for the purchase of proper food for being on a food diet;
- ◆ the proper use of food – the existence of an adequate diet, the access to drinkable water, hygiene/sanitation and health care in order to ensure the physiological needs under proper nutritional conditions;
- ◆ the stability of the first three conditions – a concept including both the assurance of the food supply continuity, regardless of the manifestation of sudden shocks (economic or climatic crises) or cyclical, and the access to food (see table 1).

The FAO document (2002) highlights the aspect of food security and the nutritional needs of the individual, stipulating the necessity of having access to safe food, appropriate from a nutritional point of view, which allows the consumer to have a

normal life. The current aspects related to food security are focused on access, safety, availability.

The joint declaration, drawn-up as a result of the WTO and WHO agreements (2002, p. 124), stipulates that the national food safety is a complex concept, including several components. According to the document issued by the two institutions, food security represents the capacity of a country to ensure an overall adequate food supply, with the aim of satisfying the nutritional needs of its own population at any moment, by internal production, imports of food products and/or the temporary use of national food stocks (WTO and WHO, 2002, p. 52).

In the case of countries depending on food imports, the national food security implies an economically convenient access to food sources, depending on the domestic production-distribution, respectively to the access to international markets, including to the exchange rate availability in order to be able to buy it from foreign markets. In these countries, the freedom of trade may reduce the auto-sufficiency in the field of basic food production and may increase the addiction to imports.

The data presented in the FAO statistics (2015a) regarding global food security, proves a constant decrease of the spread of worldwide undernourishment, from a registered average value of 18.6% in 1991 to an estimated value of 10.9% in 2015. This decrease is due to the growth of the degree of ensuring the average food ratio by food share, respectively by about 10% in the analysed period.

The consumption price indicator (CPI) for food, calculated by using the values registered in 2000 as a fixed basis, shows a constant increase during 2000 – 2013, reaching a maximum value of 2.93 in 2013. There is a slight decrease of CPI in 2014, up to the value of 2.85 (FAO, 2015a).

Romania's agro-food potential and its food security

With a total surface of 23.84 mil.ha. and an absolute value of the agricultural surface (farmland) of 14.7 mil. ha representing 62% of the total surface, Romania occupies, in point of potential for agricultural activities, the second position in Eastern Europe after Poland. The biggest part of farmland is represented by the arable land (66.3%), followed by natural grasslands (29.2%) and by orchards and vine (4.5%). An important part of farmland has a high quality soil, rich in chernozem, which is very good for vegetal crops (Stanciu, 2014a). The countryside, which is made up of farmland, forest land and the land from villages, constitutes an important component of the Romanian territory, representing 92% of the total. According to research performed by Otiman(2014), for the period 2030 – 2035, Romania has an important food potential, capable of ensuring food

for 38.5 million people, with resources available for export and the ability of an agricultural raw material consumption of approximately 49 – 50 billion euro.

According to European Commission data (2015), in the period 2010 – 2014, the percentage of the agricultural sector in the GDP ranged between 11 and 13.7%, with slight positive fluctuations in the years which were characterized by favourable rainfall (figure 1). The percentage of employees in the agricultural domain is about 30% of the total workforce from Romania, a value which is superior to the European average. Romanian food production is closely connected to climatic conditions. According to the forecasts quoted by the Ministry of Agriculture and Rural Development MARD (2014), on a medium and long-term basis, climate modifications can significantly affect the Romanian agricultural sector. Thus, in the next decades, for our country there are expected steady increases in the annual average temperature due to global warming. The forecast for Europe envisages annual temperature evolutions that can range between 0.5°C and 1.5°C for the next 15 years, which could reach up to 5°C in 2099, depending on the global evolution forecasted for Terra. Climate changes will also lead to important modifications in rainfall, which will manifest differently in the areas of our country. The North of Romania will be characterised by an increase in rainfall, materialised in an increase in crop productivity on a medium-term basis, but there will also be extreme situations, such as more floods during the winter season and drought during the summer season. The South and South-East of Romania will be extremely affected by drought, fact that will lead to a general decrease in the vegetal sector productivity (European Commission EC, 2008).

The reduction of the greenhouse effect, although possible, is very unlikely because of the lack of commitment of the world's biggest polluters (The USA, China and Canada) or the withdrawal of some important polluters, such as Japan, Russia or New Zealand from the Kyoto Agreement (Barzoi, 2011). The lack of some unitary measures to develop the national irrigation system will lead to important fluctuations in Romania's crops.

National food security is also influenced by the farms' size and yield. Land restitution to former owners after the change in the political regime was achieved by limiting the maximum areas and, in most cases, to more descendants. Romania is characterised by a fragmentation of farmland, being the member state with the most numerous small farms (under 2 ha., or under 4 LSU, respectively), with employees with a high average age, which is materialised in a Standard Production under 2,000 euro for over 75% of the local farms (EC, 2015b). Although natural resources are considerable, the Romanian agriculture productivity is low. Romania

presents significant discrepancies as compared to EU – 27 in point of the agricultural sector's productivity, even in the favourable years, the level of productivity being almost half of the EU – 27 average. The untapped economic potential of Romanian agriculture and of Romanian rural areas can be explained both by the internal structure of Romanian farms (the small size), the improper or faulty use of the production factors, the human workforce included, but also by the poor infrastructure and institutional framework. The lack of marketing infrastructure/ of capitalising the agricultural products especially represents a critical aspect for small farms (PNDR, 2013).

Thus, the average values recorded in Romania in the period 1990 – 2011 for the yields of major crops are much lower than those from EU 15. With the exception of oilseeds, for which there is a medium yield per hectare of a little over the value recorded in the Western countries, for wheat and corn the average obtained yields in Romania are of almost one third of the EU 15 average (figure no. 2). The droughts recorded in the last few years, the summer of 2015 included, were extremely severe, sometimes alternating with heavy rainfall and floods, increased these differences. At a global level, the arable crops from our country made little progress in increasing returns in the period 1999 – 2011, the wheat and corn crops stagnated and there have been fluctuations due to the unfavourable weather conditions. These statistical data must be analysed by taking into consideration the dual purpose of Romanian farms. Therefore, there is a small number of farms (representing about 7% of the total), which efficiently and competitively manage approximately 70% of farmland, obtaining production surpluses and high productivity, whereas the great majority of farms have under 5 ha. of land and low efficiency (EC, 2015).

The gap as compared to the Western Europe is obvious in the case of animal products, especially in the milk sector (figure no 3). The most domestic milk production comes from approximately 800 thousand small subsistence farms, with a small number of animals, fact which didn't allow farmers to access milk subsidies. Although NASVA imposed a series of conditions regarding raw milk delivered by farmers to the processing units, it doesn't entirely cover the Community standards. The insufficiency and inconsistency of milk production delivered by local farms, as well as its low quality, led to the orientation of some processors towards import raw milk. The elimination of milk quota will continue to significantly affect the local sector, which will be subject to fierce competition from the part of Community partners. The effect upon the national sector can be cumulated with the embargo imposed by Russia on Community food, which led to an

afflux of imported finished products on the local market (Stanciu, 2014d).

For meat products the difference in productivity as compared to the Western countries is smaller, mainly due to the fact that in official statistics there are presented only the data recorded in certified slaughterhouses. When Romania joined the EU, there was a significant decrease in the total meat production from slaughterhouses, due to a decrease in the number of animals and to the fact that numerous slaughterhouses did not comply with the European standards (Stanciu, 2014d, Stanciu, 2015). The certified slaughterhouses operate at present with a high level of performance and food safety, the economic indicators having bigger values as compared to other sectors of the national food industry.

The evolution of Romania's foreign trade transactions in the agro-food domain is presented in figure no 4. Romania mainly exports raw materials and imports finished products. The trade surplus of the agro-food product exchanges from 2014 was of 514.3 million euro, rising with 58.3% as compared to the positive balance of 324.9 million euro recorded in 2013. In 2014, Romania exported agro-food products of 5,409 million euro, with 311.5 million euro more than the previous year, whereas imports, which were 4,895.3 million euro worth, increased more slowly, exceeding with 2.6% the value recorded in 2013. As compared to the previous year, the value of the intercommunity agro-food product deliveries from 2014 increased with 10.7%, whereas exports towards third party countries decreased with 0.3%. The purchases from the EU member states increased by 3.2%, whereas the ones from third party countries were at the same level as in 2013. The main exported agro-food products in 2014 were: wheat (almost 5.0 million tons for 959.4 million euro), corn (3.7 million tons/755.1 million euro), cigarettes, seeds and the sunflower oil, rapeseeds, barley, livestock – sheep or goats, poultry meat and live cattle. As compared to products obtained in 2013, the bigger number of cigarettes and rapeseeds intended for export brought a surplus of 193.1 million euro (a total of 699.1 million euro) and 145.7 million euro (a total of 338.3 million euro), respectively. The nut export recorded a high values in 2014, too, as the delivered quantity and the unitary price increased by 22.8%, thus the proceeds also increased with 55.6% as compared to 2013, reaching 60.4 million euro.

Pork, the soy grits, the bakery-confectionery products, the different food by-products and chocolate occupied the first places in the structure of the agro-food imports in 2014, taking into consideration their share in total imports. As compared to 2013, the invoices were bigger mainly for raw tobacco (a total of 162.4 million euro,

representing an increase with 27.9%), poultry meat (146.1 million euro, +19.2%), chocolate (163.6 million euro, +16.3%) and pork (286.1 million euro, +6.5%). Sugar, a product which was traditionally situated on the first or second position in the top of imports together with pork, recorded a significant decrease in imports (less with 47.9 thousand tons, 60.8 million euro respectively), under the pressure of the quantities of sugar from beetroot produced supplementary in 2014, it occupied the 10th place in the imports' ranking, after coffee. Decreasing values of imports were also recorded at: wheat (-6.8 mil. euro), cigarettes (-29.8 mil. euro), milk and sour cream (-8.3 mil. euro), mineral waters that contain sugar and sunflower seeds. The European Union was the main partner in Romania's trade in 2014: the agro-food product deliveries towards this destination had a value share of 61.0% (58.4% in 2013), and the purchases from the EU member states hold a share of 81.4% (80.9% in 2013).

The average consumption per inhabitant of the main types of food is presented in tableno 2. The Romanians eat important quantities of cereals, the bread and the bakery products being one of the basic types of food eaten by the population. The monthly average consumption, expressed in equivalent flour kilograms is of approximately 13 kg/inhabitant, being among the highest in Europe. Milk and dairy product consumption is among the lowest in Europe, mainly because of a decrease in the population's habit to drink fresh milk. According to the NIS data (2015), a Romanian consumes approximately 20 kg./month of dairy products (in equivalent 3.5% fat milk). Thus, Romania is situated close to the lower limit of the first consumption class at a global level (FAO, 2015b).

The monthly average consumption of meat and meat products per inhabitant decreased from 5.6 kg in 2009 to almost 4.5 kg., being superior to the average recorded on a global level but with approximately 50% lower than the value recorded in developed countries (FAO, 2015c). Romania does not excel in the consumption of fruits and vegetables either. Although the monthly average consumption recorded a slight increase in 2013, reaching approximately 7.62%, the value is the average between the consumption recorded by the inhabitants with high incomes and those with medium incomes (Pollack, 2001).

The data provided by the NIS (2015) regarding the average food consumption per inhabitant, expressed in calories and nutrients per types of calories and nutrients and per types of products, presented in table 3 show a slight decrease in the total energy intake at the level of Romania with an average of almost 0.7% per year. As far as the share is concerned, almost 75% of the energy requirements is provided by vegetal foods, out of

which cereals represent almost 40%. The relatively low consumption of meat, milk and eggs reduces the share of valuable animal-origin nutrients in the Romanians' diet. The values of the main food security indicators for Romania according to FAO (food production, dietary energy supply, food price and its volatility), are presented in figure no 5.

The data presented prove that, even if Romania is classified among the countries with a healthy lifestyle, the consumption of important foods by means of the intake of nutritive components is relatively low as compared to the first places in the European ranking.

Romania and the Economist Intelligence Unit system

A parallel system for evaluating food security, set by the Economist Intelligence Unit (EIU) (2014) and sponsored by the DuPont company, proposes an alternative version of calculation of a Global food security indicator (GFSI), based on 25 criteria, joint on three main sections: Accessibility, Availability, respectively Food Quality and Safety. In a classification comprising 109 countries at the level of 2014, Romania comes on position no 45, having intermediate average values in the three sections (53, 42, respectively 34). Worldwide, the USA is on the first place, with a score of 89 points; the last in the series of the 109 states is Burundi, with only 25.1 points. By comparison with the European states, Romania comes on the modest position no 23 within the classification of the 26 countries in the EIU analysis (table 4). The first position on the European classification is occupied by Ireland, which is also the third country on global level, in terms of food security. As compared to its neighbours, Romania overpasses only Bulgaria and Ukraine, being at considerable distance from Hungary.

Bulgaria presents a superior value of the food accessibility degree compared to our country, but it has inferior values of the other two indicators, being on the 50th place in the general classification.

The evolution of the GFSI complex indicator of food security and the average of the main indicators used for calculating it by the EIU analysis are presented in figure no 6. There is a slight increase of Romania's GFSI general country indicator, under the circumstances of the accessibility degree of the population to food, of a fluctuating evolution of food quality and safety and of a small positive evolution of food availability.

Conclusions

Food security of Romania can be affected by a number of risks and threats, due to a vulnerable evolution from an economic point of view of the agro-food sector, which is extremely dependent on the evolution of the climate phenomena. Adapting

to the difficult demands of the Common Agricultural Policy, which favours the Community members with competitive economies, can decisively affect the development of the local agro-food sector.

The increase in agricultural production can be achieved by extending the cultivated farmland, although the trend towards increasing the areas intended for technical yields (for the biodiesel yield), much more profitable from an economic point of view, represents a supplementary threat to food security. The vulnerability of the agricultural sector, due to climate changes, is due to the lack of infrastructure for irrigation and the financing/co-financing deficit at a national and Community level. The isolation of the producers from agriculture due to the poor development of the transport infrastructures and to the lack of storage places, represents a factor that generates high prices, especially in the economic crisis periods. In this context, modernising the transport infrastructure for basic services represents a pre-condition for economic development and population stabilisation.

Food security in Romania is not affected by the lack of food from the market, but by an increase in imports, a decrease in the level of consumption from the local market and a lack of competitiveness of the agricultural sector.

The absence of a long-term coherent durable development strategy led to an increase in Romania's dependence on finished agro-food product imports, which represent approximately 60 – 70% of the consumed foods. The inability to capitalise own agricultural resources led to a high vulnerability of the market to the fluctuations in food prices on foreign stock markets. Government policy can decrease the impact of these threats by means of economic and fiscal measures (exemption from taxes and duties of some imports with an impact on the development of the food processing sector or giving subsidies in the poorly developed areas) and by local and regional investments, which can increase food availability. The first measures taken, i.e. VAT reduction for food products, is not correlated with support measures of the primary agricultural sector.

Romania can be threatened by its positioning among the countries with poor food security due to low yield, to the existence of some vast uncultivated or rudimentarily cultivated farmland, to the constant increase in food prices, overlapped with a lower purchasing power. All these lead to a difficulty of some segments of the population to cover the daily necessary amount of food from the available incomes.

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Appendices

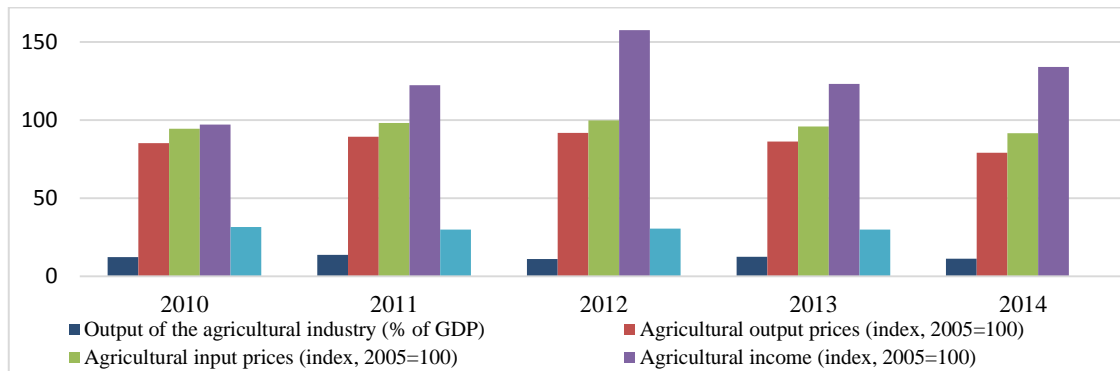


Figure no.1. Romanian agriculture - general data
Source: Author, data adaptation EuroStat, 2015

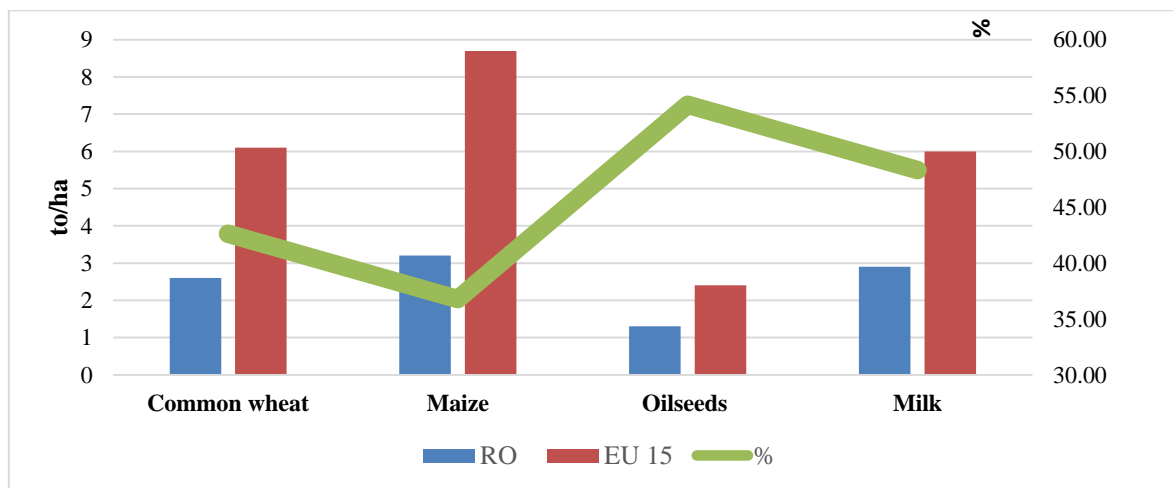


Figure no. 2. Average yields for the major agricultural Romanian products (1990-2011)
Source: Author, data adaptation EC, 2015

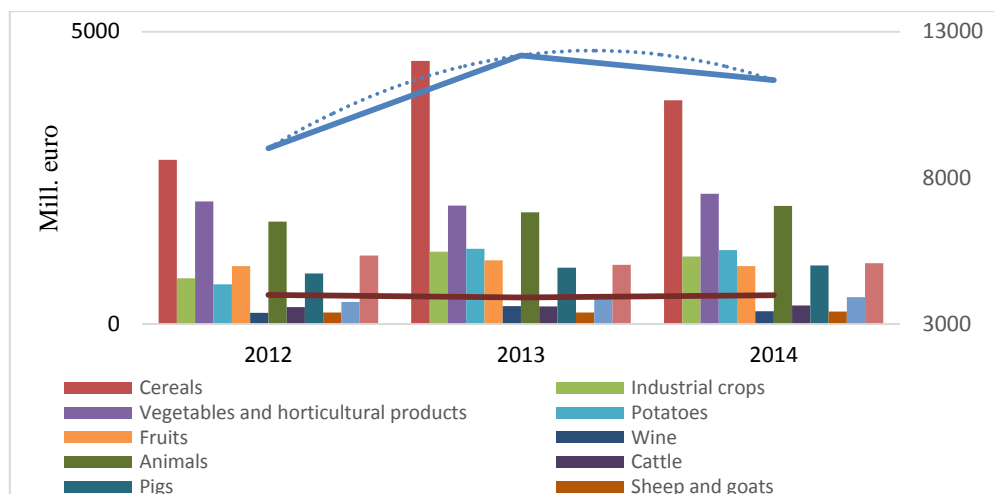


Figure no. 3. Romanian agriculture output (in million euro)
Author, EC data adaptation, 2015

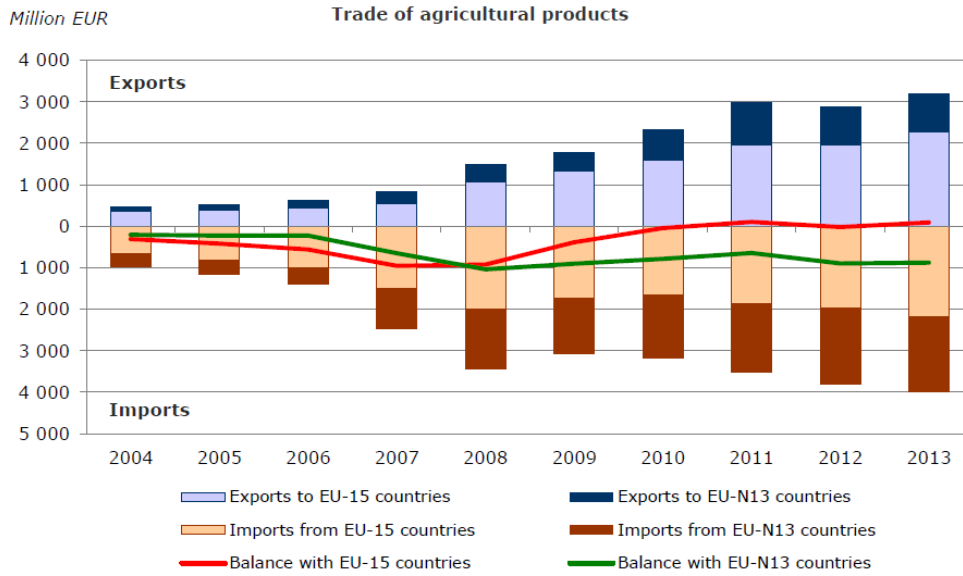


Figure no 4. Romanian trade of agricultural products
 Taken from EC, Member State Factsheets, Romania, 2015

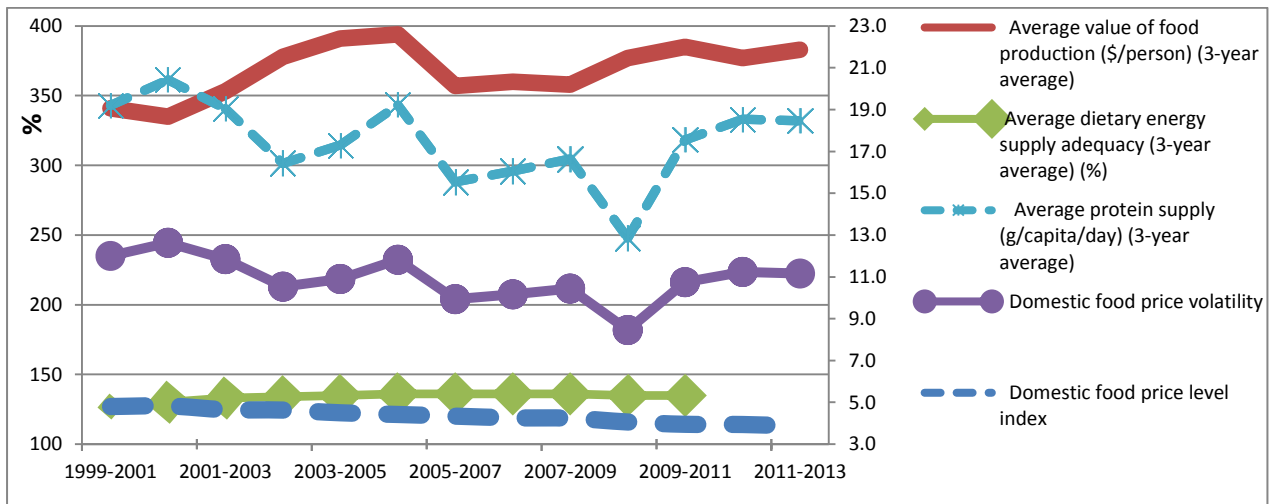


Figure no5. The main food security indicators for Romania
 Source: Author, data adaptation FAO Stat, 2015

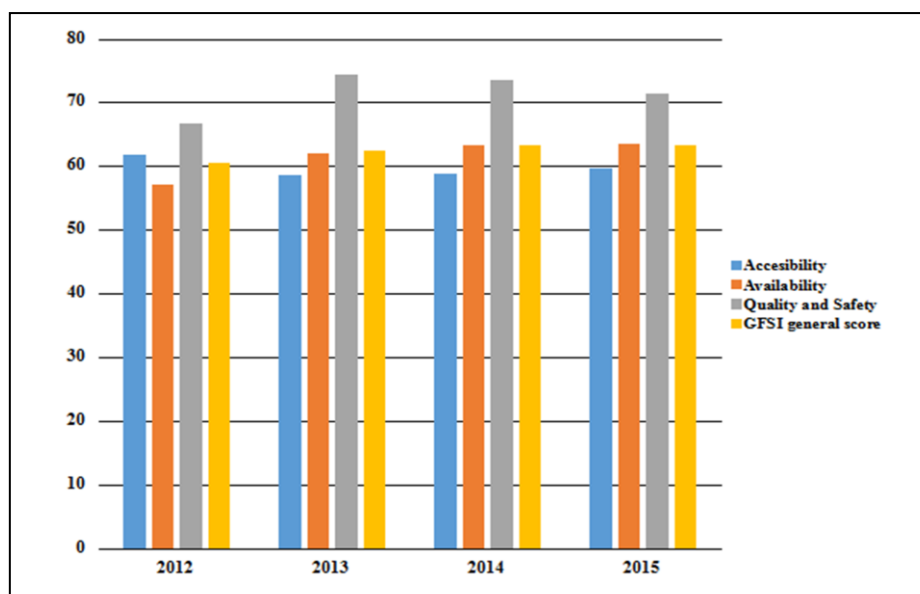


Figure no.6. Evolution of food security in Romania according to EIU
Source: Author, EIU data adaptation, 2015

Table No. 1
Evolution of food security concept at international level

Definitions of food security	Organization, document, year
„The permanent availability of a world offer of adequate base food products, in order to support the constant growth of food consumption and to compensate for the fluctuations of production and prices”	United Nations, Proceedings of the 1974 World Food Summit, Rome, 1974
„Ensuring access of the worldwide population, from physical and economic point of view, to the basic food needed”	FAO, Director General’s Report, Roma, 1986.
„The access of the global population at any moment to sufficient food for having an active, healthy life”	World Bank Report. Poverty and Hunger, Washington, 1986.
„Physical, social and economic access to sufficient, safe and nutritional food, which meets the food needs and preferences in order to have an active, healthy life”	FAO, The State of Food In safety in the world, Rome, 2002

Source: Clay, 2002

Table No. 2
Food consumption/year and capita in Romania

Food product	2009	2010	2011	2012	2013
Cereals and products (eq. cereal grain) (kg)	211.70	211.30	217.70	208.50	218.10
Potatoes (kg)	98.10	103.90	103.30	104.70	103.00
Legumes (kg)	3.50	3.00	3.20	3.50	3.30
Vegetable (kg)	148.70	155.70	162.90	151.40	152.00
Fruits kg	65.70	67.00	74.70	71.10	73.70
Sugar, including honey (kg)	24.80	23.40	23.70	22.00	21.10
Meat and meat products (kg)	67.30	59.90	56.00	55.30	54.40
Fats (kg)	21.00	22.00	19.30	19.80	18.10
Milk and products (eq. milk 3,5% fat) (kg)	253,2	244,2	248,5	241,1	244,5
Eggs (pieces)	256.00	253.00	264.00	245.00	247.00
Fish and fish products (kg)	5.10	4.90	3.90	4.20	4.30
Wine and wine products L	23.40	22.20	21.30	21.10	21.70
Bier L	87.40	81.30	84.30	90.20	86.80
Distilled beverages L, pure alcohol	2.10	1.70	1.30	1.10	1.20
Soft drinks L	164.30	163.70	148.80	150.80	154.40

Source INS, 2015

Table No 3
Food Consumption and energy intake

	2010	2011	2012	2013
Calories, total of which, by origin:	3400	3390	3287	3302
Calories of vegetal origin	2518	2533	2446	2463
-- Cereals and cereal products	1342	1387	1323	1389
-- Potatoes	206	205	207	204
--Vegetables and vegetable products	155	162	156	154
-- Fruits and fruit products	125	140	133	138
-- Vegetals fats	428	372	379	341
-- sugar and products (incl. honey)	262	267	248	237
Calories of animal origin	882	857	841	839
-- Animal fats	70	58	61	59
-- Meat and meat products	294	275	271	265
- Fish anf fish produscts	10	7	8	8
-- Milk and milk produscs	449	456	443	449
- Eggs	59	61	58	58

Source INS, 2015

Table No 4
Romania's position at European level, based on GPSI indicator

	Position /109	General score/100	GFSI Evolution 2014/2013	Accessibility Pos. Score/100		Availability Pos. Score/100		Quality and Safety Pos. Score/100	
Romania	45	63.3	+0.1	3	59.6	2	63.6	34	71.4
Bulgaria	50	61.0	-0.3	8	68.7	2	54.9	56	58.6
Hungary	31	71,4	-0,6	7	78.8	1	64.1	32	73.0
Ireland	3	85.4	+0.5	6	87.8	3	83.1	5	86.0
Ukraine	59	56.1	-1,6	4	58.6	1	51.4	48	62.6
Romania	45	63.3	+0.1	3	59.6	2	63.6	34	71.4

Source EIU, 2015