

THE TOBACCO MARKET IN ROMANIA: DECLINE OF CULTIVATION, RISE OF PROCESSING

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Abstract

The paper analyses Romania's tobacco market, focusing on both agricultural production and processing industries. The research is based on open-access sources from major international databases, reports from national and international organizations, and specialized articles from online media. Statistical data were collected from national and European sources. The findings indicate a decline in domestic raw tobacco production, driven by decreasing internal consumption and competition from low-cost, high-quality imports. Romania's tobacco processing industry is dominated by subsidiaries of multinational corporations, which play a major role in the sector's development. The domestic tobacco processing market is moderately concentrated, with a few dominant players holding significant market share. If the current concentration trend continues, the market could evolve into a highly concentrated oligopoly, potentially limiting competition. The growing demand for heated tobacco products in international markets presents an opportunity for Romanian-based processors, reinforcing the country's role as a regional hub for tobacco production and exports.

Key words: tobacco, market, processing industry, competition, Romania

INTRODUCTION

In Romania, tobacco production has a long-standing tradition, but in recent years, it has recorded a significant decline due to new legislative regulations, decreased domestic demand, and increased imports in the context of fierce international competition. The import of tobacco and processed products, offered at lower prices and higher quality, has reduced the presence of locally produced goods on the domestic market.

Tobacco is a plant belonging to the *Solanaceae* family, *Nicotiana* genus, originating from the Americas, where it was used in religious rituals by the Mayan civilization. Of the over 70 varieties of tobacco, the most widely cultivated worldwide is *Nicotiana tabacum* [8].

The history of tobacco cultivation spans over 8,000 years, as indigenous American

populations used the plant for religious and therapeutic purposes [16].

Tobacco was introduced to Europe at the end of the 15th century by Christopher Columbus after the discovery of the New World. Initially, it was cultivated for ornamental purposes and used for medicinal applications. Tobacco smoking was later introduced at the French royal court by the French ambassador to Portugal, Jean Nicot, from whom the plant's scientific name derives. It was recommended for medicinal use and for masking odors. The first cigarettes were manufactured in 1843, and in 1881, the first technological production line was developed in the United States, with a production rate of 200 units per minute. By 1910, Europe had over 20,000 registered cigarette brands. Today, the global market is dominated by major American manufacturers, who account for about 20% of global tobacco production,

totalling over a trillion cigarettes annually [20].

In the Romanian principalities, historical evidence suggests that tobacco was introduced by the Ottomans in Transylvania and Wallachia, and by Cossack warriors in Moldova during the 16th-17th centuries. From the beginning, it was regarded as a practice contrary to Christian morality and good customs, often referred to as "the devil's weed." Despite initial prohibitions and restrictions, the pleasure of smoking and nicotine addiction contributed to the spread of tobacco consumption, making it a common practice among the population [22].

According to the Food and Agriculture Organization (FAO), global raw tobacco production reached approximately 6 million tons in 2022. The world's leading producers are China (2.19 million tons), followed by India (772,000 tons) and Brazil (667,000 tons). Indonesia (225,000 tons), a country with a high smoking prevalence, is also a significant producer, alongside the United States (about 203,000 tons) and Zimbabwe (167,000 tons) [6].

The leading global company in the tobacco industry in 2022 was British American Tobacco, with net sales exceeding \$34 billion. The second-largest company was Philip Morris International, with sales surpassing \$31.8 billion.

In 2023, the United States produced less than half a million pounds of tobacco, valued at over \$1 billion. The total harvested area covered approximately 187,600 acres, with North Carolina being the leading tobacco-producing state since 2020 [15].

Health and Economic Impact of Tobacco Consumption

Smoking has a severe negative impact on health and consumer incomes, with the tobacco epidemic being considered one of the leading causes of death, disease, and poverty worldwide. The first scientific study documenting a link between cigarette consumption and lung cancer, along with other diseases caused by active and passive smoking, was conducted in the United States in 1964. This research led to the introduction of new legislative regulations governing the

production and marketing of tobacco products, as well as public awareness campaigns on the harmful effects of smoking.

The "Cigarette Labelling and Advertising Act", issued by the U.S. Congress in 1965, required that each cigarette pack must include a warning about the risks associated with smoking. The 2005 WHO Framework Convention on Tobacco Control established regulations related to protection against exposure to tobacco smoke, labelling, advertising restrictions, accountability, illicit trade, product standards, and taxation [21].

Tobacco consumption, despite being a legal product, leads to the death of more than half of its users [11].

Currently, tobacco addiction affects approximately 1.3 billion consumers worldwide, with 80% of them living in low-income regions. Smoking is responsible for approximately 8 million deaths annually, of which 1.3 million are non-smokers exposed to second-hand smoke.

Moreover, World Health Organization (WHO) officials warn that tobacco cultivation poses a serious threat to food security. Farmers growing tobacco are exposed to chemical hazards due to the extensive use of fertilizers and pesticides, as well as chronic lung conditions and nicotine poisoning caused by tobacco smoke inhalation.

WHO has called on governments to stop subsidizing tobacco cultivation and instead support farmers in transitioning to more sustainable crops that contribute to improving food security [23].

Efforts to Reduce Tobacco Production in the European Union

The European Union has made continuous efforts to reduce domestic tobacco production. In 1991, tobacco production in the EU reached approximately 400,000 tons, but by 2018, it had declined to 140,000 tons. The cultivated area also shrunk significantly, from 66,000 hectares, with 26,000 specialized farmers, across 12 European countries.

The main tobacco producers in the EU are Italy, Spain, Poland, Greece, Croatia, France, Hungary, and Bulgaria, collectively accounting for 99% of the EU's tobacco output. Due to declining domestic demand,

there has been a continuous reduction in cultivated areas. Agricultural yield varies between 1 and 3 tons per hectare, with most production coming from Virginia tobacco (71%), followed by Burley (16%) and Oriental varieties (7%).

The European Union accounts for less than 2% of global raw tobacco production. In 2018, the EU imported 420,000 tons of tobacco, resulting in a trade deficit of 360,000 tons [5].

Economic Analysis of Tobacco Production in Turkey and Ukraine

A study on tobacco production in Turkey conducted by Yildirim (2022) evaluates the cost structure and profitability of tobacco farming in the Uşak province [24].

The findings highlight the importance of family labour and farmer organizations in improving production conditions [24].

Similarly, Ivanov (2023) analyses the technological characteristics and economic efficiency of tobacco seed cultivation in Ukraine. The study assesses the new tobacco seed varieties developed by Ukrainian research institutions and emphasizes the critical role of specialized research centers in seed production [9].

Tobacco Trade in Romania

Several studies have examined Romania's tobacco trade. Toma si Vlad (2014) provides an analysis of Romania's tobacco imports and exports between 2002 and 2011, as part of a broader agricultural trade evaluation [17].

A study by Chiurciu, Zaharia & Soare (2019) evaluates the key indicators of the EU tobacco market, including cultivated areas, total production, per capita consumption, and tobacco product prices in leading tobacco-growing countries. According to their research, in 2017, the largest tobacco producers in the EU were Italy, Poland, Spain, and Greece, while Bulgaria had the highest number of registered tobacco farmers in 2014 [2].

Harm Reduction Strategies in Tobacco Consumption

Building on the idea that the primary health risk associated with smoking is the combustion process rather than nicotine, several countries have incorporated alternative

nicotine products into their anti-smoking policies.

These alternatives include Nicotine patches and chewing gum; Snus (a smokeless tobacco product used in Sweden); Electronic cigarettes; Heat-not-burn tobacco devices.

These products are particularly targeted at smokers who struggle to quit using traditional methods [21].

Smoking Trends in the European Union

According to Eurostat data, cited by Spotmedia (2024) [13], approximately 20% of EU citizens smoke daily, with men having a higher prevalence than women. The highest smoking rates in the EU are recorded in: Bulgaria (28.2%), Turkey (27.3%), and Greece (27.2%).

Meanwhile, Sweden has the lowest smoking rate in Europe (9.3%), attributed to educational programs and strict anti-smoking measures, such as: "The 2005 smoking ban in bars and restaurants"; and "The 2019 extension of the ban to terraces and public spaces".

In Romania, 19.8% of the population smokes daily. The proportion of male smokers is three times higher than that of female smokers (30.6% vs. 7.5%). Most daily smokers have maintained this habit for over a decade [13].

Targeted Marketing of Tobacco Products to Young People and Women

Research conducted by the National Institute of Public Health (INSP) indicates that: Young people have the highest increase in smoking prevalence; Women of all age groups are strategic targets for the tobacco industry.

The presence of smoking among minors (under 15 years old) is an alarming national trend, often associated with: Lack of physical activity, Unhealthy diets.

To address this, awareness campaigns should focus on educating at-risk groups, particularly in schools and high-risk communities [11].

Taxation Policies and Economic Implications of Tobacco Consumption

The increase in tobacco consumption has led to the implementation of taxes on production, processing, and trade, generating substantial revenue for public authorities, even in the present day.

Recently, a new approach to tobacco taxation has emerged, emphasizing its positive impact on consumer health. Fiscal measures have significantly contributed to reducing alcohol and tobacco consumption and have been proposed as a strategy to curb the intake of junk food as well [14].

Experts estimate that increasing excise duties on cigarettes in Romania to 65% of the retail price (currently between 56-60%) could: Reduce the number of smokers by over 400,000 people; Generate additional state revenue exceeding €250 million per year.

Moreover, introducing annual tax adjustments on cigarettes would make these products less accessible as incomes rise, while equalizing tax rates across all tobacco products would discourage the consumption of alternative tobacco items.

A portion of the additional tax revenue could also be allocated to smoking prevention and cessation programs, alongside stricter measures to combat tax evasion and eliminate duty-free tobacco sales [14].

Evaluating the Effectiveness of Tobacco Taxation as a Control Strategy

A study conducted by Chaloupka et al. (2011) [1] assessed the impact of higher tobacco taxes on smoking reduction and public health benefits. By analyzing over 100 specialized studies, the researchers found that:

- Significant tax increases effectively lower tobacco consumption.
- The greatest impact is observed among young and low-income populations.
- The health benefits are amplified when a portion of the tax revenue is reinvested in tobacco control programs.

Their findings underscore the importance of integrating fiscal policies with public health education initiatives to maximize the effectiveness of tobacco taxation [1].

MATERIALS AND METHODS

For documentation, open-access publications available on Clarivate, Google Scholar, and ResearchGate were used, along with reports from international organizations (World Health Organization - WHO, Food and Agriculture Organization - FAO), regional

institutions (European Commission), and national bodies (National Institute of Public Health).

Additionally, the research incorporated articles from specialized journals available in online media. The study was conducted using data provided by Eurostat, the National Institute of Statistics, and the Ministry of Agriculture and Rural Development.

A large part of the data identification, language verification in English, and partial systematization of information was assisted by an AI model (ChatGPT), which was used for organizing information efficiently and synthesizing literature sources.

However, the processed information was critically verified and interpreted by the authors themselves, ensuring its scientific accuracy and relevance. The final validation of results was conducted through a comparative analysis with relevant specialized studies.

RESULTS AND DISCUSSIONS

Areas Cultivated and Raw Tobacco Production in Romania

The evolution of the areas allocated for tobacco cultivation in Romania during the period 1990-2023 is presented in Figure 1.

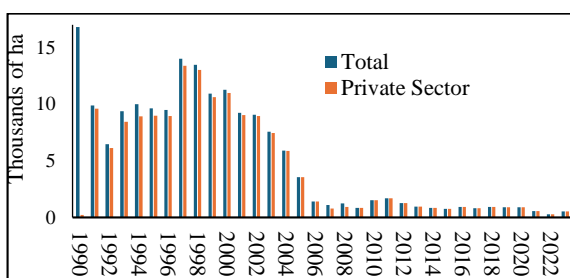


Fig. 1. Area cultivated with tobacco in Romania, 1990–2023

Source: Authors' design using the data from [12].

In 1990, approximately 16,800 hectares of land were cultivated with tobacco in Romania, with production covering most of domestic consumption and allowing for some exports. The privatization of agricultural land led to a 50% reduction in cultivated areas by 1991.

After a slight decline in 1992, there was a temporary increase, reaching a peak of approximately 14,000 hectares in 1997.

However, after 1997, tobacco cultivation underwent a drastic decline, and following Romania's accession to the European Union, the cultivated area dropped significantly, remaining below 2,000 hectares.

The lowest historical level was recorded in 2022, with only 278 hectares cultivated, representing about 1.65% of the area cultivated in 1990 [12].

To support farmers who still cultivate tobacco, various financial aid programs have been implemented, including Basic support for sustainability; Assistance for young farmers; Aid for traditional households; Transitional support measures.

However, these efforts have not succeeded in revitalizing the sector [10].

If this trend continues, Romania will remain dependent on tobacco imports in the future. Any potential revival of production would likely be driven by agricultural subsidies or increased demand from domestic processors.

The total raw tobacco production in Romania has declined in parallel with the reduction of agricultural land (Figure 2).

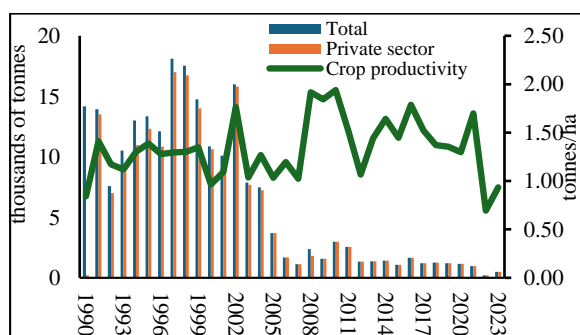


Fig. 2. Tobacco production in Romania
Source: Authors' design using the data from [12].

During the analysed period, a rising trend in Romania's total tobacco production can be observed, reaching a peak of approximately 18,000 tons in 1998. This increase was correlated with the continuation of transitional agricultural support policies after 1990.

In the following years, however, production declined significantly, falling below 5,000 tons per year. This trend can be attributed to: Market liberalization measures, Reduction of tobacco subsidies, Competition from foreign producers, who introduced low-cost, high-quality tobacco exports to the domestic market.

After Romania's accession to the EU in 2007, tobacco production became marginal, remaining below 2,000 tons per year.

The average productivity of tobacco crops in Romania is around 1.6 tons per hectare, placing it at the lower end of the European average (1–3 tons/ha). The leading tobacco producers in the EU—Italy, Spain, and Greece—have significantly higher productivity levels, nearing the upper limit of this range [7].

In Romania, 10 agricultural producers/associations are registered under NACE Code 115 – Tobacco Cultivation, but only 6 of them report a non-zero turnover.

The total turnover of the sector amounts to €2.6 million, with a total profit of €45,898, employing 64 workers [18].

The economic data for each active operator is presented in Table 1.

These figures were sourced from the TopFirme.com database.

Table. 1. Tobacco producers in Romania

Company	Turnover*	Employees	Profit*
Seeds Processing S.R.L.	1,700	57	25
Adria Leaf S.R.L.	830	3	15
Grupul de Producători Tutun Luduș S.R.L.	78.5	0	0.8
Galaxy Agri Production S.A.	22	4	0
Grup de Producători Tutun Mădăraș S.R.L.	12	0	0
Nicovasi SRL	6		5

*Thousands of Euros.

Source: Own calculation based on data from [18].

In the tobacco processing sector (NACE Code 1200 – Manufacture of Tobacco Products), a total of 14 economic operators are registered in the TopFirme.com database. This sector reports: A cumulative turnover of €690.6 million, A total profit of €39.1 million, Employment for 2,972 workers [19].

Table. 2 Tobacco processing companies in Romania

Company	Turnover*	Employees	Profit*/
JT International Manufacturing SA	328,900	57	13,900
Philip Morris Romania SRL	210,900	1,256	21,500
British-American Tobacco Romania Investment SRL	137,200	953	3,000
China Tobacco International Europe Company SRL	15,500	4	0
Rom-Ital S.R.L.	1,400	0	98
Galaxy Tobacco SA	621.7		621

Gold Steam Garden SRL	212.6		39
Mozana Business S.R.L.	187.7		16
LuscanSpeditionS.R.L.	507.9		9.5

*Thousands of Euros

Source: Own calculation based on data from [19].

An analysis of market concentration in the NACE Code 1200 – Manufacture of Tobacco Products sector, based on turnover figures, indicates a Herfindahl-Hirschman Index (HHI) of 1813.

The top three companies—JT International Manufacturing SA, Philip Morris Romania SRL, and British-American Tobacco Romania Investment SRL—hold approximately 65.6% of the market, suggesting a moderate to high level of concentration [19].

The market is not highly fragmented, yet it is not dominated by a highly concentrated monopoly either. Additionally, smaller economic operators are present in the sector, contributing to market competition. The regulatory framework within the EU market, where imports are easily facilitated, further limits monopolization potential.

Romania's International Tobacco Trade

Romania's international tobacco trade transactions are presented in Figure 3.

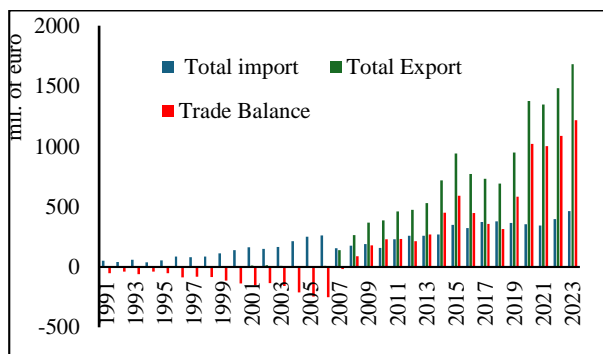


Fig. 3. Romania's International Trade with Tobacco

Source: Authors' design using the data from [12].

Between 1991 and 2000, Romania's international tobacco trade was relatively limited, with both imports and exports remaining below €100 million per year.

Starting in 2001, imports began to rise gradually, surpassing exports. From 1990 to 2006, Romania's trade balance was negative, indicating a high dependence on imports for domestic consumption.

After Romania joined the EU in 2007, a rapid increase in exports was observed, exceeding

imports and leading to a trade surplus starting in 2007. Between 2007 and 2023, exports continued to grow significantly, surpassing imports, particularly after 2015.

In 2023, exports of raw and processed tobacco exceeded €1.8 billion, while imports remained below €1 billion.

It can be concluded that Romania has become an important hub for tobacco processing. The presence of major foreign investments from international tobacco companies has stimulated exports.

Due to the declining domestic consumption, primarily caused by high taxation, there has been a continuous decrease in internal demand, with most domestic production shifting toward exports.

More than half of Romania's international tobacco transactions involve EU member states (Figure 4).

The data suggests that the EU is Romania's main trade partner in the tobacco industry, with a substantial volume of exports, particularly after 2010. Romania's accession to the European single market has reinforced its position as a net exporter, turning its trade balance positive.

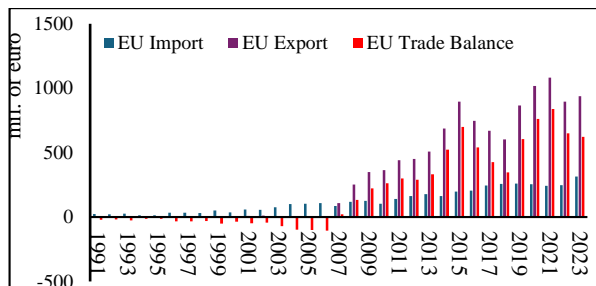


Fig. 4. Romania's Trade with EU in tobacco

Source: Authors' design using the data from [12].

The increase in tobacco exports to the EU has contributed significantly to Romania's overall trade surplus, as shown in the previous chart. However, Romanian exports are not limited to the European market, indicating that the country's tobacco industry has access to important external markets. In 2023, the tobacco sector contributed approximately €1.2 billion to Romania's positive trade balance. Total domestic tobacco exports reached over €1.68 billion, marking an increase of more than €200 million compared to 2022.

British-American Tobacco Romania Investment SRL (BAT), recognized as one of the largest companies in the local market, has invested approximately €500 million in its processing facility in Ploiești, which is the second-largest BAT factory in Europe. Over 70% of BAT's production in Romania is designated for export [18].

The shift towards heated tobacco products has become a key strategic direction for multinational tobacco companies operating in Romania (Table 3). Approximately 90% of the production from Philip Morris' factory in Otopeni—which has received over €600 million in investments—is exported to 54 countries across five continents [25].

Table 3. Romanian export of tobacco (mill. of euro)

Year	Cigarette	Heated Tobacco	Total exports
2017	660	32	692
2018	660	50	710
2019	650	150	800
2020	640	350	990
2021	635	600	1,235
2022	627	830	1,457
2023	666	1,007	1,673

Source: Own calculation based on data from [25] and [12].

From a total value of €692 million in 2017, Romania's tobacco and tobacco product exports have nearly doubled by 2022, reaching €1.457 billion. This growth was primarily driven by the rapid expansion of heated tobacco exports, which surpassed cigarette exports by approximately 30% [3]. The increase in 2023 exports was also primarily fuelled by the expansion of the heated tobacco segment, which exceeded cigarette exports by approximately 51%. The upward trend continued, with: Heated tobacco exports increasing by 21.33%; Cigarette exports registering a more modest growth of 6.22%.

This evolution reflects a structural shift in the market, with a growing preference for alternatives to traditional cigarettes.

Consumers in the target markets for Romanian tobacco products are increasingly favouring heated tobacco, a trend that strengthens Romanian-based manufacturers in the global competition.

CONCLUSIONS

Romania's tobacco sector has undergone significant transformations over the past decades, characterized by a drastic decline in domestic cultivation, a shift towards processing and exports, and the dominance of foreign capital in the industry.

Decline in Domestic Tobacco Cultivation

The post-revolutionary period saw a substantial reduction in cultivated areas and raw tobacco production, mainly due to strong competition from imported raw materials, which offered lower prices and superior quality.

Despite financial support measures for farmers, these efforts have not succeeded in revitalizing the domestic tobacco cultivation sector.

Romania as a Regional Hub for Tobacco Processing

Romania has transitioned from being a major tobacco cultivator to a key regional processing centre, driven by large foreign investments in the sector.

Most tobacco processing companies operate with imported raw materials from both EU and non-EU countries, producing high-value-added finished products for export.

The country has established itself as a strong player in the international tobacco trade, with a trade surplus in the tobacco sector, mainly due to the rising demand for heated tobacco products.

Market Concentration and Competitive Challenges

The Romanian tobacco market is moderately to highly concentrated, with the top three multinational companies controlling approximately 65.6% of the sector.

While competition exists, the dominance of foreign capital raises concerns about pricing power, potentially limiting market entry opportunities for new players.

The EU regulatory framework, which facilitates import trade, helps prevent full monopolization, yet major corporations continue to shape market dynamics.

Future Perspectives

If the current trends continue, Romania will remain heavily dependent on tobacco imports,

with domestic production playing an increasingly marginal role.

Any potential revival of local production would require substantial agricultural subsidies or a rise in demand from domestic processors.

The shift towards heated tobacco products presents a growth opportunity, as consumers in international markets are increasingly adopting alternatives to traditional cigarettes. Given the high taxation on tobacco, domestic consumption is expected to continue declining, while exports will remain the primary driver of industry growth.

Final Consideration

Romania has successfully positioned itself as a key exporter of processed tobacco products, yet challenges remain in balancing domestic production, market competitiveness, and regulatory influences. The future trajectory of the sector will depend on global market trends, EU regulations, and investment in product innovation.

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