

DYNAMICS OF THE DEVELOPMENT OF THE POULTRY SECTOR IN THE NORTH-WEST REGION OF ROMANIA BETWEEN 2019 AND 2023

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Abstract

The poultry sector matters as it is one of the most consumed types of meat in Romania. It is a sector that has greatly benefited from both public and European funds and it also registered an increase in animal welfare through a series of dedicated measures. Ultimately, the investments have generated a series of improvements to the poultry farms and to the production capacities. The enormous importance of the sector for Romania's national economy and for the country's food security is presented, and the need for a continuous flow of financing to guarantee its stability is emphasized. It is a strategic sector that requires constant attention, yet if properly cared for, it may provide high outputs and become a key element of agricultural economics at regional, national, and European levels. This article examines the dynamics of the poultry sector in Romania from 2019 to 2023, with a particular focus on the North-West Region and Bihor County. It presents the challenges and opportunities that the pandemic presented to the sector and how it developed with the help of subsidies. Both quantitative and qualitative research methodologies were employed in the study's creation, enabling the identification of key advancements as well as possibilities and challenges. Statistical data taken from the National Institute of Statistics were used. Also, the Annual Activity Reports of the Agency for Payments and Interventions in Agriculture, as well as the Selection Reports of the Agency for Financing Rural Investments, for the Intervention DR-20: poultry component, were analysed. The article highlights the fact that Bihor County was a beneficiary of European and national funds, which favoured the development of the sector, chicken meat being a star of the national market.

Key words: subsidies, poultry sector, livestock, North-West region, CAP Strategic Plan 2023 – 2027

INTRODUCTION

Romania has a strong tradition of poultry farming and significant potential for producing poultry meat. Despite past challenges, the sector remains a key dynamic force in the economy [23, 25]. Several studies highlight that a significant proportion of the population consumes poultry meat on a regular basis, with more than two-thirds of respondents purchasing it at least once a week [10, 15]. The preference for this type of meat is mainly driven by its affordability and nutritional benefits [14]. In the livestock production a key role is played by aviculture as it provides valuable food products and shows mobility as its compatible with diverse farming scales and uses efficiently the various feed resources [16].

Poultry meat and eggs are essential sources of high-quality, accessible protein. The economic efficiency of the poultry industry is attributed to several key factors, including the short growth period of broiler chickens, relatively low production costs, and consistently high consumer demand for poultry meat [24]. We need a sustainable local production in order to reduce the imports and have the products available for the population.

Romania became the direct beneficiary of a series of EU programs dedicated to rural development after 2007 that were supplemented by the National Rural Development Program (PNDR) and, the current CAP National Strategic Plan.

Due to EU funding the poultry sector went through a thorough modernization, with

European funds under Pillar II of the CAP (Rural Development) and Pillar I (Direct Payments). Romania undertook the transformation of its institutional structures in order to meet the requirements of animal welfare [20]. The poultry welfare is contingent on the prevailing environmental conditions, in all forms of agricultural production [11]. Variables, such as genetics, rearing practices, diet, and poultry handling, determine the quality of chicken meat, and influence its processing and sensory attributes [19].

2024 research highlights that in Romania, from 2007 to 2022, we saw an increase of the average annual consumption of poultry, due to its relatively low price [17].

Due to the EU funding the Romanian poultry sector reached the Western European technological standards in the sector [12]. EU subsidies have increased the output growth in the meat industry [21, 28].

Given the fact that poultry meat consumption levels are very high, the poultry sector in Romania warrants our attention and this paper aims to analyse its dynamics in the 2019-2023-time span, with a particular focus on the North West Region and Bihor Country while also looking at the results of the CAP Strategic Plan 2023 – 2027.

MATERIALS AND METHODS

The literature review places particular emphasis on the influence of agricultural policies and subsidy schemes in shaping the development of the poultry industry. It also addresses the sector's main growth determinants, analyses market trends and consumer behaviour, and highlights the key challenges and strategic opportunities relevant to the sustainable advancement of this agricultural branch.

The TEMPO Online database of the National Institute of Statistics (INS) provided statistical data, such as: growth or decline trends in poultry populations and evolution of poultry flocks, at the level of the North-West Region and Bihor County, for the period 2019-2023. Simultaneously, an assessment was carried out regarding the support instruments targeting the poultry sector in Romania, based on the reports

issued by the Agency for Payments and Intervention in Agriculture (APIA) for the period 2019–2024. Furthermore, the analysis of the Common Agricultural Policy (CAP) Strategic Plan 2023–2027 focused on identifying specific support measures relevant to the poultry sector and evaluating their potential impact, also to identify the opportunities and challenges related to the implementation of these measures.

RESULTS AND DISCUSSIONS

The quantitative analysis examined the development of the poultry sector between 2019 and 2023, both at the national level and within the North-West Region, emphasizing the region's significant role in the growth of poultry farming. Over this period, the poultry sector in Romania exhibited a moderate upward trend at the national level, with an increase of approximately 3% in the total number of poultry (from 75.36 million heads in 2019 to 77.75 million in 2023) (Table 1). The 3% increase shows a relative stability of poultry production. The maximum was reached in 2021 compared to 2020, by 8%.

The poultry meat consumption ranged between 27 and 30 kg/capita during 2019–2023, remaining above the European Union average in certain periods [9, 18, 26]. This shows the population's preferences for poultry meat. It generated a stable domestic demand and contributed to maintaining poultry stocks in a functional economic balance. Poultry meat remains the cheapest animal protein in Romania, even if prices are constantly moving and it is difficult to anticipate what will happen to their level [29].

At the regional level, it is observed that during the analysed period, increases in 2023 compared to 2019 are highlighted in the West region (with an increase of 11%), followed by the North West region with an increase of 9% (Table 2).

The North-West region ranked 2nd at the national level. It increased from 6.75 million in 2019 to 7.33 million heads in 2023. We have a trend of consolidation of the poultry sector, reflecting both the agricultural potential and the adaptability of farmers to economic and

technological conditions. A constant annual increase is observed in the North-West region, compared to the situation at the national level, where 2020 was marked by a decrease in poultry flocks compared to 2019.

The 2020 SARS-COV-2 pandemic had a huge impact on the economy and agriculture was no exception. In the livestock sector, farmers had to face problems such as supply chain disruption and production, processing and distribution difficulties.

Yet the poultry sector managed to remain stable and it quickly adapted to the new context. It's also important to note that the pandemic also affected investment dynamics, production capacity expansion and this has had an impact on the livestock dynamics in the post-pandemic period. The poultry sector was supported during the SARS COV 2 Pandemic

at the national level.

A Government Ordinance was issued in August 2020 in a total amount of 109,800 thousand lei. The beneficiaries of this measure were represented by farmers in the poultry sector, namely individual enterprises, family enterprises, authorized individuals, as well as legal entities that carry out activities of reproduction, incubation and/or raising birds for the purpose of obtaining meat or eggs [27]. The poultry flocks between 2019 and 2023 in the North-West region highlights a general growth trend in three of the six component counties: Bihor, Maramureş and Satu Mare. These counties recorded higher flock values in 2023 compared to the reference year 2019, indicating a development of the poultry sector.

Table 1. Poultry populations at National level and at Regional level 2019-2023

Specification	2019	2020	2021	2022	2023	Δ 2023-2019 (Number)	2023/2019 %
	Number						
TOTAL	75,364,575	71,183,431	77,148,372	78,220,737	77,749,597	2,385,022	103
NORTHWEST Region	6,750,551	6,813,085	7,081,358	7,161,199	7,337,525	586,974	109
CENTER Region	8,778,306	9,554,517	9,476,299	9,335,580	9,207,186	428,880	105
NORTHEAST Region	13,182,686	13,192,575	14,735,616	13,402,499	13,839,813	657,127	105
SOUTH-EASTERN Region	13,754,726	12,805,267	14,239,519	14,914,072	14,353,494	598,768	104
SOUTH-MUNTENA Region	19,981,486	15,897,501	17,315,970	19,248,605	19,414,810	-566,676	97
BUCHAREST - ILFOV Region	466,793	475,492	140,662	143,262	131,708	-335,085	28
SOUTHWEST OLTENIA Region	7,850,142	8,357,340	8,295,661	8,218,190	8,360,683	510,541	107
WEST Region	4,599,885	4,087,654	5,863,287	5,797,330	5,104,378	504,493	111

Source: Own calculation on based on data from INS Tempo on line database 2019-2023 [22].

Table 2. Poultry populations at national level and at the North West region level, 2019-2023

Specification	2019	2020	2021	2022	2023	Δ	2023/2019 %
	UM: Number					2023-2019	
						(Number)	
Romania	75,364,575	71,183,431	77,148,372	78,220,737	77,749,597	2,385,022	103
NORTH-WEST Region	6,750,551	6,813,085	7,081,358	7,161,199	7,337,525	586,974	109
Bihor County	1,724,373	2,271,747	2,346,828	2,257,603	1,967,931	243,558	114
Bistrița County	781,925	590,671	587,155	592,444	666,331	-115,594	85
Cluj County	1,489,802	1,378,243	1,399,522	1,318,392	1,243,577	-246,225	83
Maramures County	698,923	590,444	767,938	1,147,181	1,242,522	543,599	178
Satu Mare County	1,329,209	1,378,869	1,316,168	1,238,290	1,669,704	340,495	126
Salaj County	726,319	603,111	663,747	607,289	547,460	-178,859	75

Source: Own calculation based on data from INS Tempo online database 2019-2023 [22].

Bihor County stands out for its constant positive evolution during the period 2020–2022, being the only county of the three previously mentioned that in 2023, recorded a decrease in poultry numbers by 12.8% compared to the previous year, marking a reversal of the upward trend.

It is observed that the poultry populations in Bihor County are the largest in the North West region (Table 3), this was also true in reference year 1, namely 2019, as well as in reference year 5, namely 2023.

Thus, in 2023, Bihor County had 27% of the total poultry populations in the region.

An important measure to support poultry farmers at the national level was the support for Animal Welfare, which was and is managed by APIA.

Table 3. Poultry numbers 2023, NW Region

Poultry populations in 2023 NW Region & counties		% of total
NORTHWEST Region	7,337,525	100
Bihor County	1,967,931	27
Bistrița County	666,331	9
Cluj County	1,243,577	17
Maramures County	1,242,522	17
Satu Mare County	1,669,704	23
Salaj County	547,460	7

Source: Own calculation on the basis of data from Tempo online database 2023 [22].

The significance of animal welfare is underscored by the inclusion of a dedicated intervention Measure 14 within PNDR 2014–2020, specifically aimed at supporting and enhancing welfare standards in livestock farming [20]. Thus, during the analysed period, the transition was made from Measure 215 to Measure 14 and then to DR-06 within the CAP Strategic Plan 2023-2027.

Measure 215 (PNDR 2007-2013) Animal welfare payments – applied to a limited extent in 2019, marking the end of the previous financial year. Measure 215 aimed to support animal welfare on livestock farms by compensating for additional costs and income losses resulting from voluntary commitments that went beyond the minimum legal requirements. It was organised into five sub-packages (1b–5b) for bird welfare, targeting lighting, density, transport, access to water and reduction of nuisances.

Measure 14 - M14 (PNDR 2014-2020) general objective was the improvement of the environment and the rural space by promoting higher standards of animal welfare. Its specific objective consists of supporting the livestock farms that adopt voluntary commitments. These measures exceeded the basic mandatory requirements, and financial assistance was provided in the form of compensation aimed at offsetting the additional expenses and income reductions resulting from their implementation. Animal welfare payments

were available under M14 for two sectors: pigs and poultry.

Package B under M14 included five sub-packages aimed at improving the conditions of raising and transporting poultry, that are:

1b) providing artificial lighting of 30 lux minimum in order to help birds maintain their natural behaviour;

2b) improving comfort and reducing stress by reducing by 10% the housing density in relation to the minimal requirements that refer to the area allocated for each bird;

3b) improving transportation conditions by reducing bird density by at least 30%;

4b) ensuring drinking water safety and quality by lowering nitrite and nitrate levels

5b) Reducing noxious emissions by 30% compared to standard levels, by maintaining microclimate parameters (temperature, humidity, ammonia) within optimal ranges.

In the context of the new programming period 2023–2027, the CAP was transposed into the CAP Strategic Plan, and support for animal welfare was maintained as an important component. The animal welfare measure, previously applicable through M14, was taken over and continued in the new financial year through intervention DR-06. This further includes the package for the poultry sector, reaffirming the commitment to improving the conditions for raising birds and to promoting a responsible and sustainable production system. For the period 2023-2027, support through DR-06 targets the bird sector through Package B payments in favour of bird welfare:

1 b) – reduction of bird density by 15% compared to the density resulting from the application of the mandatory minimum requirements regarding the minimum area allocated for each category of birds,

2 b) – reducing pollution by 30% compared to the minimum mandatory level by maintaining microclimate parameters within optimal limits [8].

For sub-package 1b, the commitment consists of decreasing the density of birds by extracting (eliminating) a sufficient number of animals, so that the space allocated to each remaining animal increase by at least 15%, compared to the density resulting from the application of the minimum mandatory requirements, as follows:

- For broiler chickens, the density must be reduced based on the level used, meaning reduced density from the customary values of 28.69 kg/m², 33.91 kg/m² or 36.52 kg/m²;
- For laying hens, the values differ as such: a minimum of 1,278 cm²/head if the alternative system is used or a minimum of 862 cm²/head if the improved cage system is used;
- For heavy breed breeding hens, the stock density must be adjusted to the standard value of 21.74 kg/m²;
- For turkeys, the maximum density will be of 47.83 kg/m² for males and 43.48 kg/m² for females [13].

In 2020, the smallest number of applications was submitted, namely 273 whereas 2023 was the year with the most applications submitted, at 279. We can observe that there is a minuscule difference between the number of applications submitted and the number of applications authorized for payment. The year with the biggest difference was 2021, when 30 applications were rejected so only 93% of the submitted payment applications were authorized.

The authorization for payment of intervention DR-06, Animal Welfare, for the commitment year 2024 is carried out in 2025, by 30.06.2025 – Table 4 [8].

Table 4. Numerical and value evolution of requests and payments (2019–2024) - Poultry Animal Welfare Package B

Year	Applications submitted (number)	Requested value (Euro)	Authorized requests (number)	Authorized value (Euro)	% Authorized Applications from Applications submitted
2019 (M215 and M14)	275 (51/M215+224 /M14)	76,796,819	273	70,036,285	99
2020 (M14)	273	73,105,059	262	66,540,764	96
2021 (M14)	278	77,184,481	258	69,504,443	93
2022 (M14)	278	79,655,725	268	72,485,308	96
2023 (DR-06)	279	83,202,979	265	76,232,915	95
2024 (DR-06)	279	87,593,493			

Source: Own processing based on APIA Reports 2019-2024 [2, 3, 4, 5, 6, 7, 8].

Table 5. DR-20 - Session 01/23 - 30.04.2024 Component poultry and other farm animals, including bees North West Region

Specification	Euro eligible currency	Euro support value
Bihor County	11,629,601	7,559,238
Total NW Region	11,629,601	7,559,238
Total allocated per session	22,461,072.80	22,461,072.80
% NW Region of total allocated		34

Source: Own processing based on AFIR Selection Reports related to DR-20 [1].

The financial support granted through the European Agricultural Fund for Rural Development (EAFRD) has contributed to a notable increase in the share of commercial poultry farms applying enhanced animal welfare standards, which reached 84% at the national level [13].

Within CAP Strategic Plan 2023-2027, through the intervention of DR-20 Investments in the livestock sector, the poultry sector is also supported. The maximum value of public support for a project that can be financed under DR-20 is 2,000,000 Euros/project, and in the

case of projects that only propose the acquisition of agricultural machinery and equipment. The maximum value of public support will be 300,000 Euros/project. Intensity of public support non-refundable refers strictly to the eligible costs related to the project and can be a maximum of 65% of the eligible value of a project. This supports the proper functioning of high-performance poultry farms at all levels. Thus, within DR-20 - the poultry and other farm animals' component, including bees, had allocated for the DR-20 project submission session 01/23 -

30.04.2024 a value of 22,461,072.8 Euros, a value requested in full by potential beneficiaries – Table 5.

During the DR-20 session 01/23 - 30.04.2024 for the poultry and other farm animals' component, including bees, a number of 39 projects were submitted, of which 8 were in the North West region [1].

Of these, 4 projects were selected for funding, considering the allocated value and the score achieved by each investment. The approved projects concerned investments in broiler farms, all located in Bihor County. Their eligible value represented 34% of the total support allocated during the project submission session.

CONCLUSIONS

The analysis of Romania's poultry sector from 2019 to 2023 underscores its resilience and growth, particularly in the North-West Region and Bihor County. Despite challenges like the SARS-COV-2 pandemic, the sector showed adaptability, with a 3% increase in poultry populations nationally and notable regional growth.

Romanian consumers have a “love affair” with the poultry meat who is an important source of protein and is consumed more than in the other member states.

This generated a stable public support through strategic investments that were supplemented by EU funds.

Despite numerous challenges, the greatest of which was the pandemic, the poultry sector managed to increase its population by 3% nationally and demonstrated notable regional growth. Romanians prefer poultry meat and consume it on a regular basis for protein intake, making Romania the biggest poultry meat market in the EU. This has led to constant public support and strategic investments using EU funds.

As a novelty we also had strong investments in the poultry welfare that also generated a more efficient and sustainable sector,

Bihor County is one of the net beneficiaries of this favourable climate. Moreover, the sector is of critical importance for the national economy and more EU funds are needed to consolidate it.

In further developments need to take into consideration the emerging challenges, leveraging technological advancements, and promoting sustainable practices to maintain the sector's competitive edge.

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