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State of Art of Agriculture in Moldova in the process of EU integration

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Agricultural Policy Monitoring

Country report – Republic of Moldova

Aurelia Litvin

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STATE OF ART OF AGRICULTURE IN MOLDOVA IN THE PROCESS OF EU INTEGRATION

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1. INTRODUCTION

The Republic of Moldova is a small country located in Eastern Europe, between Romania to the west and Ukraine to the north, east and south. It has an area of about 33,846 km² and a population of about 2.6 million inhabitants. The capital of the country is Chisinau, which is also the largest city of Moldova, being an important cultural, economic and administrative center. Moldova is known for its varied landscapes, predominantly plains, hills, and forests. The Dniester River, one of the largest rivers in the region, runs through the east of the country and is an important source of water and energy. The relief also includes picturesque regions, with hills and vineyards, which favor wine production. Moldova's economy relies heavily on agriculture, viticulture, and winemaking, with a strong tradition of producing quality wines and exporting agricultural products worldwide. The agricultural sector focuses on cereal crops, vegetables, fruits, and viticulture, playing a crucial role in the country's trade balance. However, Moldovan agriculture faces significant challenges, including unpredictable climatic conditions, inefficient irrigation systems, limited access to financing, and low productivity due to insufficient mechanization and modern technologies. Although efforts have been made over the past decade to modernize the sector, investments remain insufficient to ensure sustainable growth. Additionally, Moldova's economy is hindered by a reliance on energy imports and significant labor emigration.

Agriculture has represented approximately 10-11% of Moldova's GDP in recent years, (Statistical databank, 2022) a significant proportion compared to many other European countries. While agriculture contributes substantially to GDP, the economy's dependence on this sector makes Moldova vulnerable to fluctuations in international agricultural markets and adverse weather conditions. A poor harvest can have a major impact on the country's overall economic growth.

The COVID-19 pandemic had a mixed effect on agriculture in the Republic of Moldova. During the early stages of the pandemic, the agricultural sector was impacted by movement restrictions and supply chain disruptions, which made it difficult to access inputs (seeds, fertilizers, fuels) and distribution markets. At the same time, limitations imposed on other sectors made agriculture one of the few stable sources of income, creating a steady internal demand for local products. However, the pandemic led to increased prices for inputs and materials, and the effects have been felt in the long term through higher production costs and reduced access to export markets due to logistical interruptions. The Government of the Republic of Moldova has taken a number of measures to support the economic recovery and the agricultural sector, (AIPA, 2022) including: (1) *Subsidies and direct aid for farmers*: The state has provided financial aid for farmers affected by drought and pandemic. The grants were awarded to help farmers recover some of their losses and invest in new technology and equipment. (2) *Tax facilities*: The government has implemented tax measures to support the business environment and the agricultural sector, including tax deferrals and exemptions and (3) *Support for SMEs*: The SME sector, which was severely affected, benefited from credit lines and support from the state and international organizations.

In February 2022, still under the influence of the pandemic, Moldova faced a new crisis, generated by the conflict between Russia and Ukraine. The conflict triggered a rapid increase in prices in Moldova, causing one of the highest inflation rates in Eastern Europe in 2022, which exceeded 30% in some periods. This phenomenon has been fueled by rising energy and food prices, having a direct effect on the cost of living for the population and production costs for companies. The war in Ukraine has intensified existing difficulties and created new challenges for the agricultural sector in the Republic of Moldova, particularly in:

- *Input Prices*: Prices for fertilizers and fuel have risen significantly, as Ukraine and Russia are major suppliers of such products in the region. This has led to an increase in production costs.
- *Export Market*: The war has disrupted trade routes and affected export flows to neighboring countries. Many agricultural products had to be redirected through longer and more costly routes.
- *Access to Financing*: Economic uncertainty and geopolitical risk have made banks more reluctant to provide financing for agricultural projects, leading to a lack of capital for farmers.
- *Labor Migration*: Some of the workforce has migrated, either due to the crisis or due to better opportunities in other countries, leaving farmers with difficulties in hiring seasonal workers.

The war between Russia and Ukraine has exposed Moldova's economic and agricultural vulnerabilities but has also accelerated the process of orientation towards the European market and adaptation to the new challenges of energy and food security.

2. STATE OF THE AGRI-FOOD SECTOR

The Republic of Moldova, as a country with middle-income levels, has made progress in reforming its economy over the past decade. National production, measured by Gross Domestic Product (GDP), is volatile, but still shows moderate growth during the observed period. GDP at current prices increased from 7,022 million EUR in 2015 to 13,795 million EUR in 2022, showing consistent growth over the years, except for 2020, when GDP dropped to 10,116 million EUR, likely due to the impact of the COVID-19 pandemic. This decline was followed by a strong recovery in 2021 and 2022. GDP per capita also increased, from 2,476 EUR in 2015 to 5,433 EUR in 2022, indicating an improvement in the standard of living. However, there was a slight decrease in 2020, which aligns with the overall GDP decline (Table 1).

Table 1. Macroeconomic overview through selected general and agricultural statistics, 2015-2023, Moldova

	Units	**2015**	**2016**	**2017**	**2018**	**2019**	**2020**	**2021**	**2022**	**2023**
GDP (at current prices)	mill. EUR	7,022	7,210	8,451	9,527	10,484	10,116	11,569	13,795	-
GDP per capita	EUR	2,476	2,572	3,067	3,519	3,935	3,839	4,457	5,433	-
Total employment	000. persons	601.4	594.2	598.9	613.0	625.2	601.6	622.7	623.6	626.3
Employment in agriculture	000. persons	36.8	36.7	37.6	37.7	36.4	34.2	34.5	33.9	33.0

Source: Statistical databank for Moldova, 2023

During the 2014-2020 period, the share of agriculture in the national economy registered decrease in the contribution of the agricultural sector to the national economy. Thus, in 2014, agriculture had a contribution of about 14.1% in the gross added value, and until 2019 its value constituted only 11.7%, or by 2.4 p.p. less so, given that there were no natural disasters that decisively influenced the sector's results during the respective period. (Figure 1)

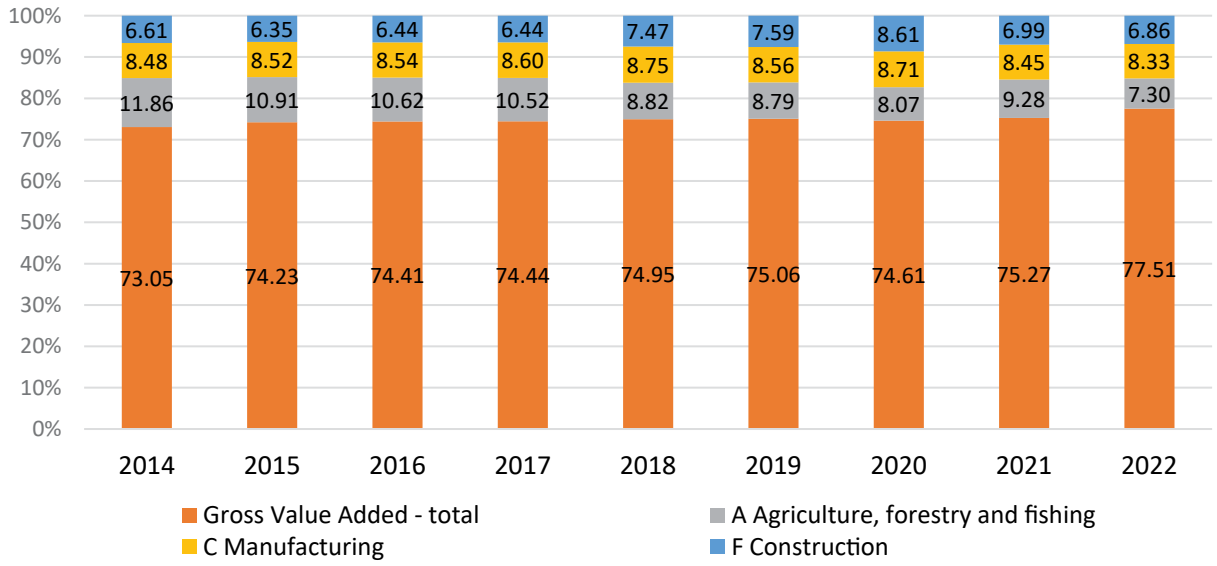

Figure 1. Structure of gross added value by economic branches, 2014-2022, %

Source: National Bureau of Statistics of the Republic of Moldova

Information is presented without the data on districts from the left side of the river Nistru and municipality Bender.

The decrease in the share of agriculture was caused by the low contribution in the gross added value of the outputs generated by the agricultural sector and, implicitly, by the low productivity of the sector compared to other sectors of the economy. The analysis of the contribution of economic activities to the formation of the volume of production shows a constant decrease in the weight of the agricultural sector, reaching only 10.5% in 2019 compared to the maximum in the last 10 years of 12.6% in 2014. However, the decrease in the weight of the volume of production, combined with the decrease in the share of the sector in the gross added value, denotes the orientation of the sector towards products with low added value. In 2022, in the Republic of Moldova, the gross added value related to agricultural activities was achieved of about 1.12 billion EUR (current prices) and represented about 7,30% of the total gross added value of the Republic of Moldova, ranking third, after trade and manufacturing industry.

The Russia-Ukraine conflict has dramatically influenced inflation, which had already begun to rise due to the imbalances between supply and demand during the pandemic. Inflation surged dramatically in 2022, reaching its highest value of 30%, and led to a significant decline in the purchasing power of the population. With the country's modest economic growth, the unemployment rate tends to decrease; thus, the unemployment rate has significantly dropped over the last decade, reaching its lowest value in 2021 in rural areas and in 2022 at the national level (Figure 2).

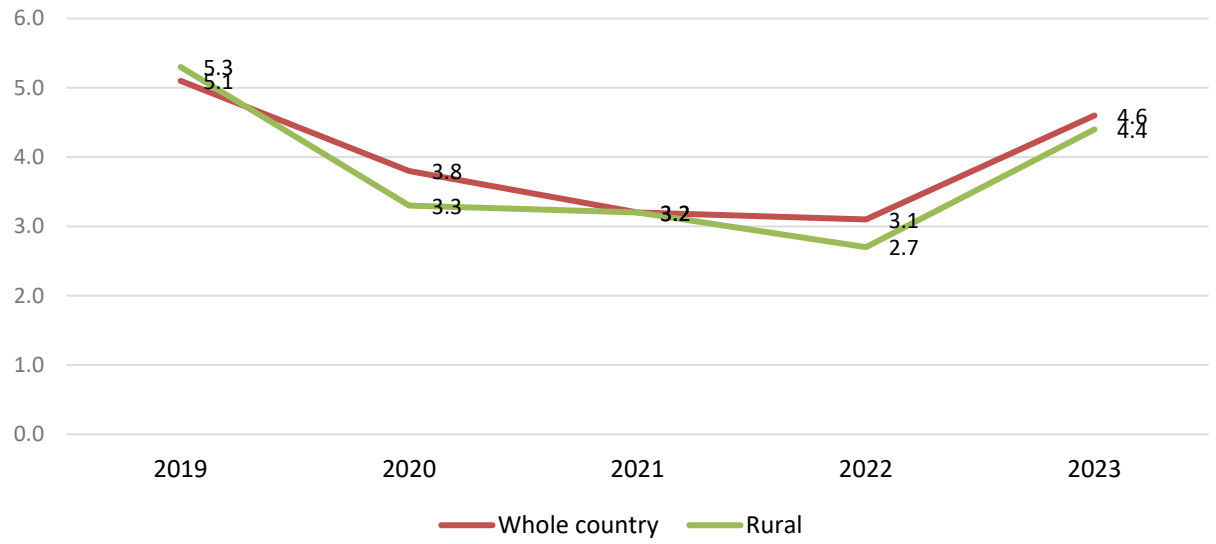

Figure 2. Evolution of unemployment rate, both sexes, annual average, 2019-2023, %
Source: Statistical databank for Moldova, 2023

The evolution of the agricultural sector is primarily determined by climate. In drought years, the sector stagnated, while in years with sufficient rainfall, it thrived. Otherwise, it experienced no remarkable fluctuations. Overall agricultural production stagnated during the period from 2017 to 2020. In the "fruitful" year of 2021, the sector saw spectacular growth, only to decline again in 2022. But in 2023 an improvement of the situation can be seen (Table 2).

Table 2. Evolution of Gross agricultural production in Republic of Moldova, 2017-2023

	Units	**2017**	**2018**	**2019**	**2020**	**2021**	**2022**	**2023**
Gross agricultural production	mill. EUR	1,637.0	1,645.3	1,758.5	1,523.4	2,289.3	2,014.4	2,116.5

Source: Statistical databank for Moldova, 2023

The evolution of crop production was the determining factor in the overall agricultural production trend. Between 2017 and 2020, crop production decreased by nearly 17%. Due to favorable weather conditions, it almost doubled in 2021. In 2022, crop production returned to the 2017 level, but in 2023 there was an increase in crop production. These fluctuations in crop production highlight the minimal capacity of the sector to withstand adverse climatic conditions (Figure 3).

Animal production was minimally affected by climatic conditions. After a long period of stagnation, the sector experienced considerable growth in 2022, followed by a gradual decline in 2023. However, it is important to note that the growth in 2022 was almost exclusively driven by rising prices, while animal production in physical units (tons or pieces) saw a slight decrease (Figure 4).

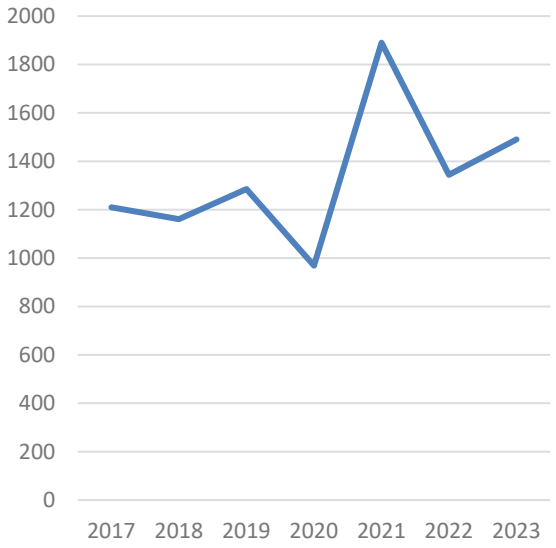

Figure 3. Evolution of crop production, 2017-2023
000, EUR

Source: Statistical databank for Moldova, 2023

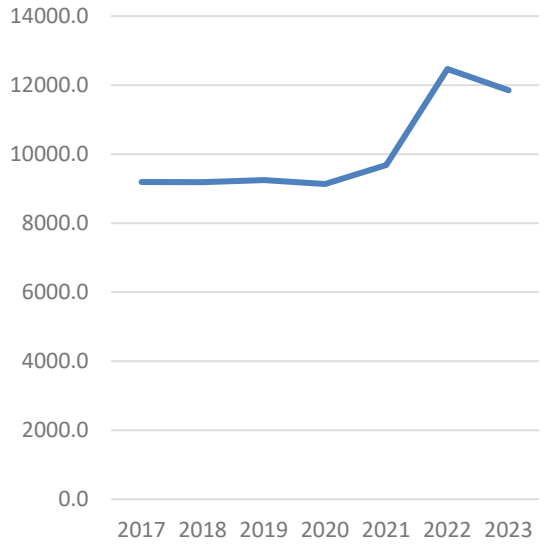

Figure 4. Evolution of animal production, 2017-2023
tone

Source: Statistical databank for Moldova, 2023

Between 2017 and 2022, the number of cattle continuously declined. It is observed that the number of cattle held by the population decreased, while the number held by agricultural enterprises and farms with livestock on their balance sheets increased. The data in the figure 5 do not include fattening cattle. A similar situation is observed with sheep and goats. A comparative presentation in a graph is irrelevant, given the huge gap between the number of livestock held by the population (95% in 2023) and those held by peasant households (Figure 5).

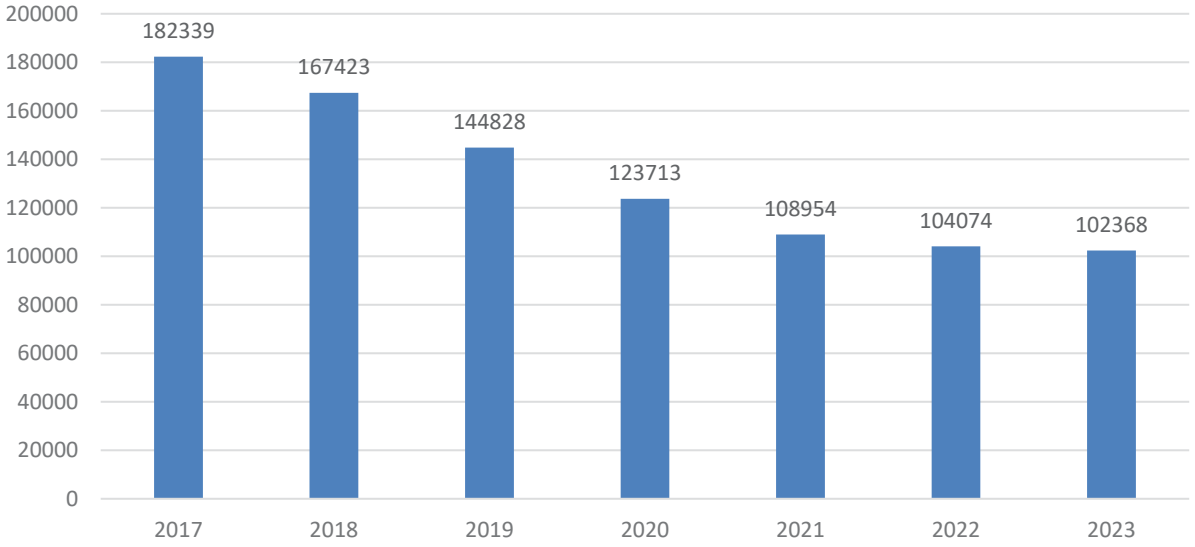

Figure 5. Evolution of number of cattle, capita, 2017-2023

Source: Statistical databank for Moldova, 2023

There is a constant decline in the total number of cattle during the analyzed period. The number decreased from 182,339 in 2017 to 102,368 in 2023. From 2017 to 2021, the decline is accelerating, with annual rates of more than 10%. In 2021-2023, the pace slows, with smaller declines below 5%. The data in figure 6 indicate a significant decline in the number of cattle during the 7 years analyzed, with a total decrease of approximately 80,000 heads (-44%). After 2021, the decline becomes slower, suggesting a partial stabiliza-

tion of the sector. Labor migration, reduced investment in animal husbandry, climate change and the rising costs of feeding and maintaining them have contributed to this decline.

The total land area of the Republic of Moldova is 3384.7 thousand hectares. As of 2023, of the total land area in Moldova:

- 2.39 million hectares (67% of the total) were agricultural land,
- 0.4 million hectares (13%) forest land,
- 0.3 million hectares (9%)- intra-village lands, etc.
- The surface of irrigated lands is 217.94 thousand hectares.

Land in the Republic of Moldova is owned by almost 2.3 million owners. Over 56% of the land are in private ownership (2.1 million owners of 1.9 million hectares), over 23% of the land is in public ownership (784.2 thousand hectares), and about 21% of the land is part of administrative-territorial units (696, 4 thousand ha).

In the period 2016-2023, there is not registered significant distortions in the evolution of the sown areas of the total agricultural areas. The most significant findings related to the dynamics of agricultural areas refer to:

- the increase by about 5% of the areas sown during the period, in the conditions of a relative stability of the area sown with cereals and legumes- grains (+2%), and an increase in the areas planted with technical crops (+6.5%);
- the framework of technical crops where there is an increase in the areas planted with sunflowers and a significant reduction in the areas of sugar beet (Figure 6).

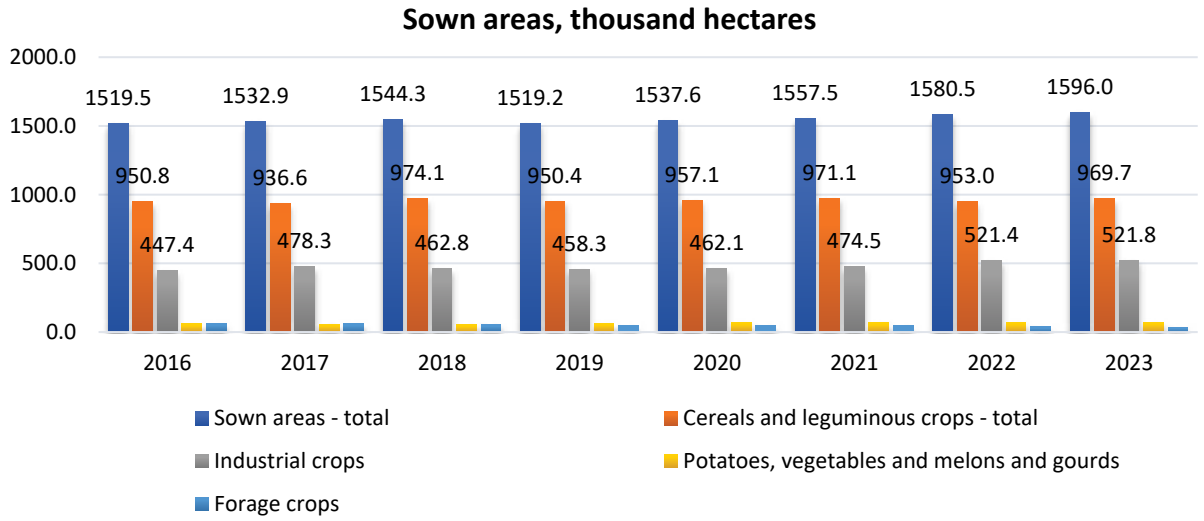

Figure 6. Evolution of sown areas, 2016-2023
Source: Statistical databank for Moldova, 2023

From the total structure of sown areas, the largest share, throughout the analyzed period, is held by agricultural enterprises with a weight of 55%. Throughout this period, this share has a positive dynamic and in 2023, agricultural enterprises own 879.6 thousand hectares of land from the sown surface per general (Figure 7).

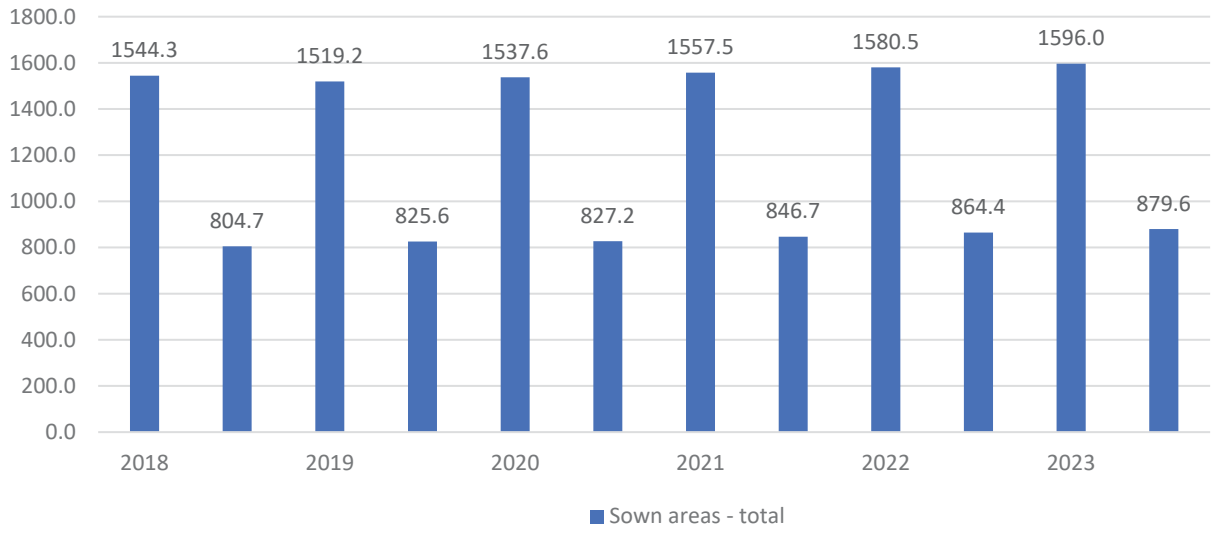

Figure 7. Evolution of sown areas
Source: Statistical databank for Moldova, 2023

In the field of foreign trade with agri-food products, the same trend is observed as at the beginning of the previous decade, which only intensified after the signing of the Deep and Comprehensive Free Trade Agreement with the EU in 2014.

Thus, after the signing of the Deep and Comprehensive Free Trade Agreement with the EU, the share of agri-food production exports from the Republic of Moldova to the states of the Commonwealth of Independent States (CIS) continued to decrease, reaching a record low share of 18.1% in 2020. At the same time, exports of agri-food production to other markets, especially the EU market, developed rapidly. Thus, in the period 2015-2023, the share of agri-food production exports in EU states increased from to 52.4% (Figure 8).

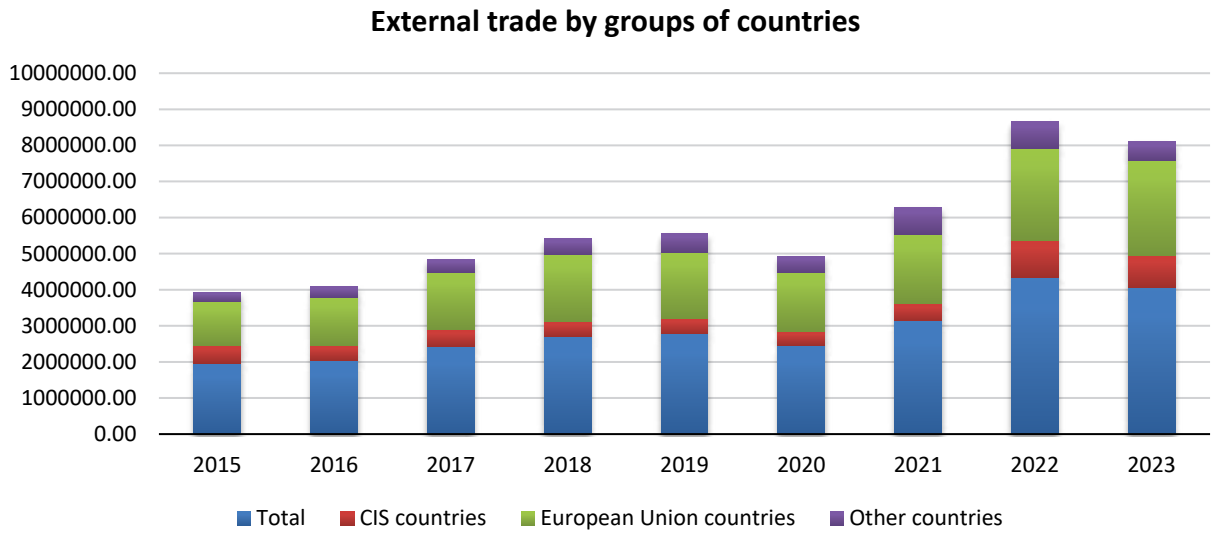

Figure 8. External trade by groups of countries, 000 EUR
Source: Statistical databank for Moldova, 2023

The Republic of Moldova's exports have seen a steady decline over the past year and a half, from an all-time high of EUR 4,338 million in 2022 to EUR 4,052 million in 2023, with an estimated annualized value of EUR 3,770 billion for 2024. This significant reduction reflects a combination of internal and external factors that have pushed the Moldovan economy into a decline in exports, affecting the country's competitiveness on international markets (Figure 9).

The decrease in Moldovan exports in the last year and a half is the result of a series of structural factors that affect not only external trade relations, but also domestic production capacity. The loss of Ukraine's role as a trade hub, declining exports to the Commonwealth of Independent States (CIS), inconsistent policies affecting key sectors such as vegetable oils, and the decline of agriculture contributed to this downward trend. In the absence of effective economic and commercial interventions, Moldova risks continuing this downward trend in exports.

The Republic of Moldova is a country that has an import volume that prevails over export. Energy products, oil, mineral fertilizers have an enormous impact. In the structure of imports of agri-food products by product category, products with high added value, namely those of the animal origin and those of the food industry, have the highest weights compared to the exports.

Although agri-food products provide about 45% of the total exports of the Republic of Moldova, the trade balance with agri-food products is unstable and vulnerable. Thus, in the period 2015-2023, only in 2020 there is an increase in the trade balance observed, after which in 2023, compared to 2022, an increase is also recorded (Figure 9).

Figure 9. External trade, thousand EUR
Source: Statistical databank for Moldova, 2023

About 1/3 of the exported products are delivered to the markets of neighboring countries, like Romania and Ukraine. The main partners include Turkey, Italy, Bulgaria, Germany and Poland. Over 58% of the total value of exported production is delivered to the markets of EU countries. The market of the Commonwealth of Independent States (CIS) countries constitutes just over 10% (Figure 10).

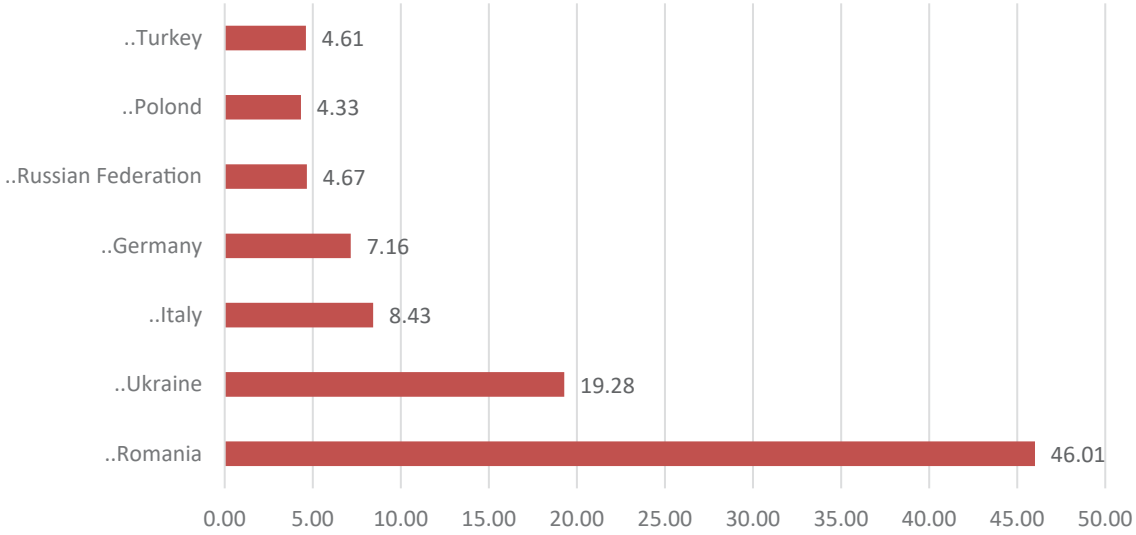

Figure 10. Export rate to main markets, %
Source: Statistical databank for Moldova, 2023

The largest quantities agricultural products exported in 2022 were: corn, sunflower seeds and oil, wheat, fresh fruits, wines, rapeseed. The highest revenues are generated by sunflower seeds, wines, juices, bakery and pastry products, canned and prepared vegetables and fruits, mineral and carbonated waters, sugary products. The main animal products exported: natural honey, live cattle, frozen meat of cattle, sheep and goats, chicken eggs, poultry meat.

Towards the green agenda – state of affairs

In recent years, the organic farming sector has been developing rapidly all over the world. The demand for naturally produced food is steadily increasing. It also increases governments' interest in environmentally friendly agriculture and healthy food. Under these circumstances, it is estimated that the area under organic farming will continue to expand. This is also true for the Republic of Moldova, a country with excellent conditions for organic farming.

Organic farming is a solution for Moldova to revitalize agricultural land with the help of organic practices and to achieve better productivity and prices. The government has also recognized this potential: since 2010, the state has been financially supporting the conversion to organic farming and, since 2013, it has been paying subsidies for organic viticulture and fruit farms.

Thanks to state support and the involvement of organic certification bodies, which recognized Moldova's potential for organic farming, the area of certified organic land has steadily increased in recent years. In 2018, 17,746 ha were certified organic, including those in the process of conversion, which corresponds to 0.9% of the total exploited agricultural area (1,941.4 thousand ha).

Moldova's organic sector has considerable potential for continued growth. The fact that most Moldovan farmers use small amounts of synthetic fertilizers and pesticides facilitates the conversion to organic production. Moldova's free trade agreement with the EU (DCFTA) boosts exports and increases the competitiveness of Moldovan agricultural products. For the government and international donors, promoting organic farming is a valuable opportunity to generate more income in rural areas while conserving resources and protecting the environment.

Diversifying organic production for export, but also for the domestic market, offers opportunities to inspire and motivate young people to practice organic farming. This is particularly important given the massive migration of young people from rural areas to cities. Organic farming is an interesting option for the young population in particular, as it not only opens up job opportunities, but also stimulates innovative thinking and action. Both aspects contribute to greater personal satisfaction in everyday work.

In the Republic of Moldova there are all the climatic conditions for the development of organic farming. Developments in this area, however, are not yet commensurate with their potential. If in 2017 the total area of land certified in the organic system was 75,686.1 ha, in 2019 it decreased to 28,546.6 ha, of which 22.1 thousand ha certified in the organic system and 6365 ha in conversion. Thus, only 1.1% of the agricultural area of the Republic of Moldova is cultivated organically. For comparison, the average in the EU is 8.5%, and the European Commission is targeting a proportion of 25% by 2030.

According to data from the Atlas of Organic Farming, in 2020 there were 152 registered operators, mainly farmers, 71 crops and 53 organic products. Organic agri-food production is regulated by Law no. 115/2005 on organic agri-food production, but this is aligned with repealed European regulations.

A harmonization with the relevant EU legislation was initiated in 2019, with the transposition of the provisions of Regulation (EU) no. 2018/848 of the European Parliament and of the Council of 30 May 2018 on organic production and labelling of organic products and repealing Regulation (CE) no. 834/2007.

The control of organic production is carried out in parallel by inspection and certification bodies, some recognized, others not recognized by the European Commission. The same duality persists in the collection of statistical data: data are collected by the Ministry of Agriculture and Food Industry, as the competent national authority, and by the European Commission. Respectively, a good part of the economic agents certifies their agri-food production based on the EU Regulation, not being registered in the Republic of Moldova, and another part – with the national control bodies, based on Law no. 115/2005 on organic agri-food production, which, however, is not in accordance with EU rules. As a result, products certified in accordance with national rules cannot reach the European market and thus the market for organic operators in the Republic of Moldova is further restricted.

A problem that concerns both organic and traditional agriculture is the chronic lack of qualified personnel, and a large part of those employed work seasonally.

Organic farms in the Republic of Moldova grow, for the most part, cereal crops. In the organic production structure, 75% goes to production, 11% to processing, 10% to animal husbandry and only 4% to trade. The main findings for this area can be summarized as follows:

- national policies and practices on organic production are not in line with EU rules;
- Moldovan organic certificates are not recognized in the EU, which narrows the market for organic operators in the Republic of Moldova;
- there are insufficient capacities to control the conversion of masses, certification technologies, raw materials and organic products;
- there is also a lack of local capacities for the production of biological preparations to combat diseases and pests.

3. NATIONAL POLICY FRAMEWORK

The Republic of Moldova has made significant developments in agricultural policy in recent years, with a focus on modernizing and improving the sector to increase productivity, ensure food security, and boost rural development. Some specific developments in Moldova's agricultural policy include:

Implementation of the National Strategy for Agricultural Development 2023-2030 - Moldova has adopted a long-term strategy to guide its agricultural development, focusing on increasing agricultural productivity, improving infrastructure and technology, promoting sustainable practices, and enhancing competitiveness in international markets.

Support for smallholder farmers - Moldova has implemented various support programs for smallholder farmers, including subsidies for inputs such as seeds and fertilizers, access to credit, and training and extension services to improve farming practices and increase yields.

Promotion of agribusiness development - The government has implemented policies to attract investment in agribusiness and promote entrepreneurship in the sector. This includes providing financial incentives, creating a favorable business environment, and supporting value-added processing and export-oriented industries.

Land reform and rural development - Moldova has implemented land reform policies to improve land governance, increase land tenure security, and promote sustainable land use practices. The government has also invested in rural infrastructure development, such as roads, schools, and healthcare facilities, to improve the quality of life in rural areas and attract young people to stay in farming.

Trade and market access - Moldova has focused on improving market access for agricultural products by signing trade agreements with EU countries and implementing quality standards and certification systems to meet international market requirements. The government has also supported export promotion efforts to help farmers access new markets and increase their competitiveness.

Overall, Moldova's agricultural policy developments have shown a commitment to modernizing the sector, improving productivity, and promoting sustainable practices. However, challenges remain, including the need for further investment in infrastructure, technology, and research, as well as addressing issues such as climate change, land degradation, and rural poverty. Continued efforts and support from both the government and stakeholders will be crucial to ensure the long-term sustainability and growth of Moldova's agricultural sector.

A great emphasis was placed on the development of regulatory policies for the agri-food sector (Table 3).

Table 3 National legislation in the field of the food industry

NATIONAL LEGISLATION	Normative act	**Num.**
National legislation in the field of the food industry	Laws/Government Decisions	5/32
National legislation in the field of support to agriculture and rural areas	Laws /Government Decisions	4/3
Normative acts and policy documents in the field of land improvements and land fund	Laws/Government Decisions/ The Constitution, the Land Code, orders, guides, etc.	12/22/30
National legislation – integrated water resources management policies	Strategy /Laws/Government Decisions	1/2/27
Normative acts in the sanitary-veterinary field and safety of food products of animal origin	Laws/Government Decisions	7/99
Policies in the crop sector	Laws/Government Decisions/Order	22/62/29
Policies in the livestock sector	Laws/Government Decisions/Order	7/18/3
Plant protection policies and food safety of plant origin	Laws/Government Decisions/ Regulation	3/21/1
Wine and spirits sector	Laws/Government Decisions/Order	2/15/4
Organic Farming	Laws/Government Decisions/Order	1/3/3
Products with DOP, PGI and TSG	Laws/Government Decisions/Order	2/1/1

Source: Ministry of Agriculture and Food Industry of the Republic of Moldova

Considering the trend of Moldova's accession to the European Union, the Ministry of Agriculture and Food Industry, in its activity process, is guided by a series of international laws and regulations (Table 4).

Table 4 International legislation in the field of the food industry

	Normative act	**Num.**
International legislation in the field of food industry	Regulations	5
International legislation in the field of agriculture and rural environment	The Common Agricultural Policy (CAP) and the Treaty	1
International legislation in spatial planning	Normative acts, agendas, conventions, etc.	11
International legislation in the field of viticulture and alcoholic products	Regulations	3
International Legislation on Organic Farming	Regulations	4
Plant protection policies and food safety of plant origin	Regulations	4

Source: Ministry of Agriculture and Food Industry of the Republic of Moldova

Towards the green agenda – policy framework

The new CAP regulations voted in June 2018, the European Commission launched its proposal for the post-2020 Common Agricultural Policy (CAP), and the new CAP regulations were adopted by the European Parliament in Plenary only on 23 November 2021. Delegated and implemented acts of these new CAP regulations (2023–2027) voted in the first quarter of 2022. Regulations active from January 1, 2023, to December 31, 2027.

The new CAP gives member states more flexibility in implementing policy objectives and will include improvements in social issues. The green movement welcomes the new social conditionality (compulsory from 2025) which will ensure strengthened rights for farmers and farm workers.

The European Commission has clearly supported targets for the transition to sustainable food systems by 2030. But as the CAP plays a key role in providing the means to achieve these targets, it is essential that the implementation of the CAP at national level through national strategic plans explicitly contributes and fully to ecology. Implementation of Deal and related strategies, which include the Farm to Fork strategy, the biodiversity strategy and the target of achieving 25% of Europe's organic land by 2030.

The European Green Deal covers several sectors where the EU can improve sustainability, including the energy, transport and agri-food sectors. The Farm to Fork Strategies (European Commission 2020a) and EU Biodiversity Strategies (European Commission 2020b), both part of the European Green Deal, were unveiled in May 2020 and aim to achieve the deal's targets for the agri-food sector.

Some initiatives under the Farm to Fork and EU Biodiversity Strategies overlap (e.g. initiatives aim to boost greener and more sustainable practices). The Farm to Fork strategy includes those initiatives and ambitions relevant to the entire (organic) food supply chain. This chapter will focus on this strategy.

There are some priority directions in the National Strategy for Agriculture and Rural Development 2023-2030 (HG 56/2023[1]) regarding the Green Deal objectives, for example:

- Implementation of technologies and measures to reward the use of bioeconomy and circular economy principles;
- Supporting and strengthening environmental protection, by using environmentally friendly techniques. (Biological control, conservative-regenerative techniques, etc.);
- Biodiversity conservation, water and soil protection.

On 31 August 2023, the Parliament adopted in second reading the Law no. 237/2023 on organic production and labelling of organic products, which is partially harmonized with the Regulation (EU) 2018/848 of the European Parliament and of the Council of 30 May 2018 on organic production and labelling of organic products.

The Government Decision no.253/2024 on detailed rules on organic production, retroactive recognition of conversion periods, and products and substances approved for use in organic production, transposes four EU acts: 1) The annexes II, III and IV of the Regulation (EU) 2018/848, 2) Commission delegated Regulation (EU) 2020/2146, 3) Commission Implementing Regulation (EU) 2021/1165 and 4) Commission Implementing Regulation (EU) 2020/464. The Government Decision was approved on April 10th, 2024.

The Government Decision nr 252/2024 for the approval of the Regulation on the production and marketing of plant reproductive material of organic heterogeneous material of particular genera or species, approved on 10 April 2024, transposed the Commission Delegated Regulation (EU) 2021/1189.

1 https://www.legis.md/cautare/getResults?doc_id=136318&lang=ro

The draft Government Decision regarding the system of control and certification, the recognition of control bodies and the supervision of their activities transposes ten EU acts. The draft Government Decision was promoted for approval at the Government meeting of 19 June 2024.

The draft Government Decision for the approval of the Regulation for import and export of organic products, will transpose four EU acts. The draft was submitted for initial consultation with interested stakeholders.

Organic operators are certified by national or international control bodies, competent authority is the Ministry of Agriculture and Food Industry, for the accreditation system is responsible the National Accreditation Centre of the Republic of Moldova (MOLDAC).

Reports received from the national and international control bodies operating in the Republic of Moldova are processed now to collect data on the number of operators organic certified, the area certified organic or in conversion, as well the products which are certified. This information is made available on the official web page of the Ministry of Agriculture and Food Industry (access the link[2]).

Law no. 107/2024 was approved, approving some amendments to Law No. 66/2008 on the protection of geographical indications, designations of origin and traditional specialties guaranteed (Law No. 66/2008). The amendments to Law No. 66/2008 enter into force on 17.06.2024, and (i) will ensure the implementation of the Geneva Act and (ii) will improve the mechanisms of official control and certification of GI products.

Law 66/2008 transposes the provisions of EU Directive 2004/48/EC regarding the respect of intellectual property rights. Also, it partially transposes Regulation (EU) 1151/2012 regarding systems in the field of agricultural and food quality.

Commission Implementing Regulation (EU) 2020/602 of 15 April 2020 amending Implementing Regulation (EU) 2017/717 as regards model zootechnical certificates for breeding animals and their germinal products was transposed through GD 262/2023[3] regarding the approval of the Requirements regarding models of zootechnical certificates for animals of reproduction and the originating germinal material from these.

Government adopted the Decision no. 589/2023[4] regarding the approval of the Regulation on the definition, description, presentation and labelling of beverages containing alcohol. It aims to establish specific rules regarding the definition, description, presentation and labelling of beverages containing alcohol, rules regarding rectified ethyl alcohol of agricultural origin and distillates of agricultural origin used in the production of beverages containing alcohol, essential rules and requirements regarding their quality and safety and circulation in order to prevent fraudulent practices and ensuring a high level of consumer information and protection.

The Decision transposes (with the exception of the provisions that are strictly aimed at member countries) Regulation (EU) no. 2019/787 on the definition, description, presentation and labelling of spirit drinks, the use of the names of spirit drinks in the presentation and labelling of other food products, the protection of geographical indications of spirit drinks, the use of ethyl alcohol and alcohol distillates agricultural origin in alcoholic beverages, and repealing Regulation (EC) no. 110/2008, CELEX: 32019R0787, published in the Official Journal of the European Union L 130 of 17 May 2019, as last amended by the Delegated Regulation (EU) 2022/1303 of the Commission of April 25, 2022.

The annex related to the wine sector from the Regulation (EU) 1308/2013 was transposed in GD no. 356/2015 (amendments approved by HG no. 891 of 22.11.2023) and in Law no. 57/2006 (approved amendments by Law no. 407 of 21.12.2023).

2 https://ecovisio.maps.arcgis.com/apps/dashboards/135ea1c213244d4d916da6823ae08804
3 https://www.legis.md/cautare/getResults?doc_id=137123&lang=ro
4 https://www.legis.md/cautare/getResults?doc_id=138781&lang=ro

4. MEASURES AND BUDGETARY SUPPORT OF AGRICULTURE AND RURAL DEVELOPMENT

The efficient allocation of subsidies to agricultural producers is a precondition for the sustainable development of agriculture and the technological modernization of entities in transition economies, such as the Republic of Moldova. Thus, increasing the efficiency of subsidy allocation is essential in the context of the sustainable development of the agricultural sector. For this purpose, the state proposed to develop agricultural policy by increasing financial allocations and granting subsidies to farmers. Granting subsidies is an effective lever both for attracting investments in agriculture and for the development of this sector.

Until 2022, the subsidy policy was regulated by Law no. 276/2016 regarding the principles of subsidies in the development of agriculture and the rural environment. Since 2023 a new subsidy policy was approved. Thus, according to Law no. 71/2023 regarding subsidies in agriculture and the rural areas, the National Fund for the Development of Agriculture and the Rural Environment is allocated to the following forms of subsidies: Payments in advance, Post-investment payments, Investment payments in stages, Direct payments, Complementary payments.

The new law establishes the general principles of state policies regarding the encouragement and stimulation of agricultural activities and rural development, the priorities for the use of financial means intended for the development of agriculture and the rural environment, and its adjustment to good European practices.

The modernization of the agro-industrial sector and the development of rural localities is ensured by establishing the following priorities:

- increasing the competitiveness and sustainable development of the agro-industrial sector;
- ensuring the sustainable management of natural resources;
- sustainable socioeconomic development in rural areas.

The financial resources are allocated from the National Fund for the Development of Agriculture and the Rural Environment (FNDAMR). FNDAMR represents all the budgetary means, as well as those from the development partners, intended to finance the support measures approved by the Government. FNDAMR funds are approved in accordance with the State Budget Law.

In 2023, the value of FNDAMR constituted 80.97 million EUR, which was later increased by 13.3%, constituting 91.74 million EUR and respectively capitalized as follows:

- the state's contribution to the National Vine and Wine Fund- 1.06 million EUR in accordance with art. 2 lit. f. from the State Budget Law for the year 2023;
- commitments to agricultural producers who made investments in 2022, but did not benefit from subsidies as a result of the exhaustion of the FNDAMR- approx. 61.17 million EUR;
- advance subsidies for the development of start-up projects – 0.79 million EUR;
- advance subsidies for improving the standard of living and work in rural areas- 7.60 million EUR;
- direct payments in the livestock sector: per head of animal – 2.41 million EUR and payments per kg of milk – 4.66 million EUR;
- partial compensation of the diesel excise tax – 7.53 million EUR;
- the LEADER approach – 3.65 million EUR;
- complementary subsidies – 2.86 million EUR.

Out of the total investment projects implemented, 29 investment projects target the livestock sector, especially the beekeeping sector which provides for the procurement of bee families with specialized honey

production equipment, in the case of 26 investment projects and 3 agricultural producers have launched their business in the poultry sector and of cattle.

At the same time, another field developed by the beneficiaries of subsidies is the horticultural sector, 21 projects implemented by establishing multi-year plantations, including apricot, apple, cherry, walnut, plum, etc. and just a start-up project for building greenhouses.

Budgetary transfers to the agricultural sector, in the analyzed period, have a positive dynamic. Figure 12 shows a steady increase in grant funds over the years, from 22 million EUR in 2010 to 107 million EUR in 2023. The most notable increase occurs between 2020 and 2023, when funds increase from 68 million EUR in 2020 to EUR 107 million in 2023, marking an increase of almost 39 million EUR over just three years. The increase continues at a relatively steady pace in the following years, especially from 2015 to 2020 (from 35 million EUR to 68 million EUR) and continues until 2023. This reflects an ongoing commitment by the government to increase financial assistance for sectors that need support (Figure 11).

Regarding the number of applicants, it is also increasing. The graph 13 shows a steady increase in the number of applicants over the years, from 1,088 in 2010 to 16,334 in 2023. This indicates a significant increase in the demand for grants over time, reflecting a growing need for financial assistance in various sectors (Figure 12).

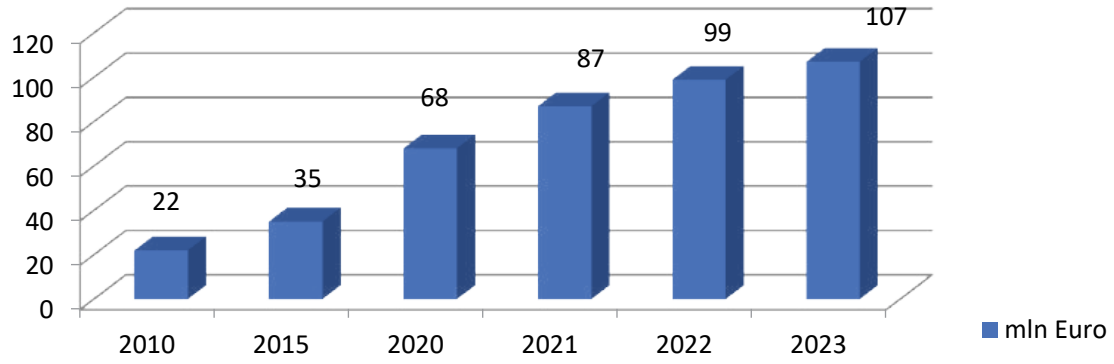

Figure 11. Evolution of the Subsidy Funds

Source: AIPA

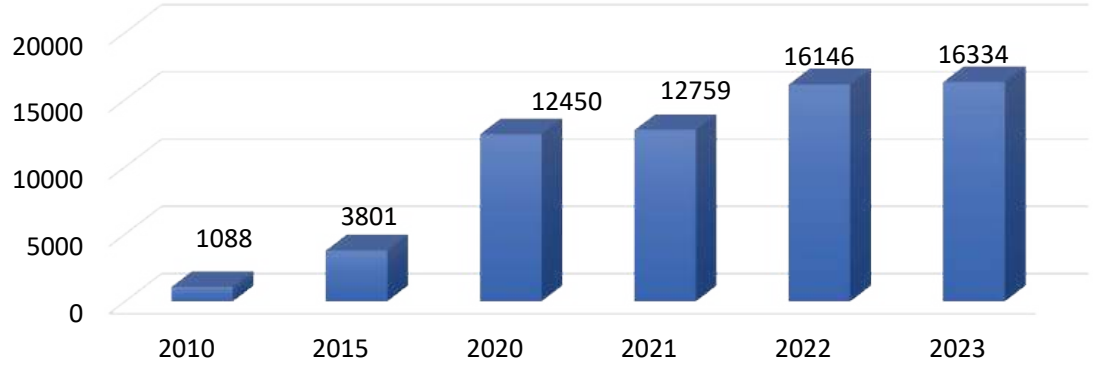

Figure 12. Evolution of Subsidy applications, number

Source: AIPA

The direct payment is a subsidy expressed in a fixed amount, granted in a single installment, for the implementation of agricultural activities in the livestock sector and is granted per head of animal and per kilogram of product.

In 2021, for the first time, the incentive mechanism for direct payments per head of animal was implemented. Thus, in 2023, the new subsidy policy maintains the mechanism for stimulating direct payments in the livestock sector.

Direct payment per head of animal is granted for owners of cattle, sheep, goats and horses, registered in the State Register of Animals (RSA), according to Law no. 231/2006. At the same time, in order to be eligible for subsidies, the animals must be insured under the conditions of Law no. 183/2020 on subsidized insurance in agriculture.

For the first time, in 2023, direct payments were allocated per kilogram of product, namely for a kilogram of cow's milk. Direct payments are made quarterly to the farmer who owns livestock, obtains and delivers own livestock production to the collection / processing / slaughterhouse / marketing facility.

Based on Order no. 72 of July 26, 2023 of the Ministry of Agriculture and Food Industry, the Intervention and Payments Agency for Agriculture received, until September 15, 2023, requests for granting direct payments in the livestock sector per kg of cow's milk produced. During the call, AIPA received requests for subsidies of 0.16 EUR per kg of invoiced milk. Thus, 178 economic entities benefited from financial support, for 28,821.6 tons of invoiced milk, and the amount disbursed from the FNDAMR was approximately 4.66 million EUR.

Starting from 2022, Local Action Groups from the Republic of Moldova can access subsidies from the sources of the National Fund for the Development of Agriculture and the Rural Environment, according to the provisions of Law no. 71/2023 regarding subsidies in agriculture and the rural environment. For the implementation of the LEADER Program, an amount of up to 5% of the FNDAMR value is allocated, which in 2023 constituted 4.68 million EUR.

Government Decision No. 455 of 21-06-2017 regarding the distribution of the means of the National Fund for the Development of Agriculture and the Rural Environment provides for the following subsidy measures and sub-measures, for which subsidy amounts were authorized in the period 2016-2021 (Table 5).

Table 5. Measures and sub-measures eligible for financial support within the program FNDAMR

Measure / submeasure	Description
Submeasure 1.1	Stimulating investments for the production of vegetables, fruits and aromatic, seasoning and medicinal plants on protected land (greenhouses, solariums, tunnels)
Submeasure 1.2	Stimulating investments for the establishment, modernization and deforestation of multiannual plantations, including vineyards and fruit plantations
Submeasure 1.3	Stimulating investments for the purchase of conventional agricultural equipment and equipment
Submeasure 1.4	Stimulating investments for equipping and technological renovation of livestock farms
Submeasure 1.5	Stimulating the procurement of breeding animals and maintaining their genetic background
Submeasure 1.6	Stimulating investments for the development of post-harvest and processing infrastructure
Submeasure 1.7	Stimulating lending to agricultural producers by commercial banks and non-bank lending organizations to access investment loans
Submeasure 1.8	Stimulating the establishment and functioning of groups of agricultural producers
Submeasure 1.9	Boosting promotional activities
Submeasure 2.1	Stimulating investments to consolidate agricultural land
Submeasure 2.2	Stimulating investments for the purchase of irrigation equipment
Submeasure 2.3	Incentive for agricultural producers to compensate for irrigation expenses
Submeasure 2.4	Stimulating investments for the purchase of no-till and mini-till equipment
Submeasure 2.5	Supporting the promotion and development of organic farming
Measure 4.	Improvement and development of rural infrastructure
Measure 5.	Consulting and training services

Source: AIPA

The main financiers of the agro-industrial sector are agricultural producers as investors, the state through AIPA, ADMA (Agency for the Development and Modernization of Agriculture) ODA, UCIP-IFAD, the World Bank, the European Investment Bank, as well as the development partners: the European Union, The United Nations Development Program (UNDP), the USA through USAID, the Governments of Japan, Sweden, the Czech Republic, Poland, Romania, Slovakia, Hungary, Denmark, the Netherlands, FAO, as well as other foreign investors.

The Neighborhood Program for Agriculture and Rural Development (ENPARD) aims to increase agricultural productivity, food security and sustainable development in rural areas through technical support and financial assistance. ENPARD helps Moldova align its agricultural policies with European Union standards, supporting the implementation of reforms and the modernization of agricultural practices. It also focuses on improving rural infrastructure, providing training and promoting rural entrepreneurship to create job opportunities. By stimulating rural development, ENPARD contributes to the integration of Moldova into the EU and to its general economic growth. Table 6 shows the information regarding the financial support from the Neighborhood Programme to Agriculture and Rural Development (ENPARD) (Table 6).

Table 6. ENPARD Moldova – Support to Agriculture and Rural development

Contract	Title	Contractor' signature date	End date of activities	Amount (EUR)
	Contracting party			
ENI/2015/371-907	ENPARD Moldova – Support to Agriculture and Rural Development, SRC	16/12/2015	15/12/2020	48,956,111.00
ENI/2015/371-916	Support to Agriculture and Rural Development through promotion of confidence building measures	23/12/2015	31/12/2018	6,446,272.81
	UNITED NATIONS DEVELOPMENT PROGRAMME			
ENI/2016/380-139	Capacity building of the Moldovan Agency for Intervention and Payment in Agriculture (AIPA) for the application of EU norms and standards for the administration of ARD support schemes	02/12/2016	06/12/2018	1,185,485.68
	AGRARMARKT AUSTRIA			
ENI/2016/380-171	Technical Assistance for the implementation of the Sector Reform Contract: European Neighbourhood Programme to Agriculture and Rural Development (ENPARD)	11/11/2016	10/05/2019	2,626,230.42
ENI/2017/383-396	Facilitating active engagement of the civil society actors in the agro-rural policy dialog.	07/02/2017	28/02/2019	259,200.00
	Asociatia Obsteasca Federatia a Agricultorilor din Moldova (FARM)			
	BDO LLP			

Source: MAIA

Towards the green agenda – budgetary support

Financial support is granted to producers who are registered in the organic farming system as a compensatory payment for the loss of income and additional costs incurred by the beneficiaries who make voluntary commitments and undertake to stay in this farming system for a period of 5 years. At the same time, the beneficiaries of the subsidy are obliged to return the amounts received only if they do not maintain themselves in the organic farming system for 5 years (Table 7).

Table 7. Subsidy from the National Fund for the Development of Agriculture and Rural Environment, EUR

Crop	**for 1 ha of agricultural land subject to the conversion process**		
	in the first year	in the second year	in the third year
Orchards and vineyards	71,42	95,23	119,04
Medicinal and heteroolaginous plants	61,90	76,19	-
Vegetables	71,42	95,23	-
Field crops	38,09	47,61	-

Source: AIPA

Incentive payments are provided in the Strategic Program for voluntary commitments to encourage the application of ecological agricultural practices, the reduction of the use of mechanized equipment, the reduction of the application of chemical fertilizers, as well as the increase of the level of carbon sequestration on the surfaces of permanent meadows, etc. Financial support is given to producers who are registered in the organic farming system and commit to remain in the farming system for a period of five years.

5. APPROXIMATION TO THE EU POLICY

On December 23, 2023, the Council of Europe requested the opening of negotiations for the accession of the Republic of Moldova and Ukraine to the European Union, which led to the start of the coordination mechanism of the European integration process of the Republic of Moldova.

Therefore, the Self-Screening of the entire acquis of the European Union was carried out on the agriculture component, the Ministry being responsible for the chapters: XI "Agriculture and Rural Development", XII "Food Safety, Sanitary and Phytosanitary Policies" and XIII "Fisheries", constituting over 40% of the acquis communautaire.

At the same time, in order to achieve the criteria for accession to the EU deriving from the Association Agreement, the Ministry of Agriculture and Food Industry, with the help of the National Plan for Accession to the European Union (EU NAP), focused on the implementation of actions and the preparation of the Accession sectors.

Thus, for Chapter XI, in the first semester, 22 actions were planned, of which 7 (32%) were carried out, and with the status of unrealized, there are 15 more actions or (68%). For Chapter XII, 19 actions were planned to be carried out 6 (32%) and with a rate of 68% of unrealized actions. With regard to Chapter XIII, no action has been taken for the reason late reception of the chapter. However, there are 6 actions in the process of being implemented.

Following the conclusion of the first phase of the preliminary analysis of the compatibility of EU acts with the legal framework of the Republic of Moldova, the preparations related to the Screening are provided by the European Commission, namely DG AGRI. In April and May 2024, the Moldovan delegation undertook a series of visits to Brussels in order to offer it answers to questions that arose during the self-assessment.

The next step towards achieving the Republic of Moldova's zero priority, namely preparing the country for European Integration by 2030 is the Bilateral Screening, which It involves presenting the detailed situation of the country for each area.

6. DISCUSSION, CONCLUSIONS AND RECOMMENDATIONS

The agricultural field is a key sector for the economy of the Republic of Moldova, and the Association Agreement brings changes aimed at promoting agriculture and rural development by adopting existing practices from the European Union. First of all, the improvement of product quality will be ensured by protecting geographical indications, designations of origin and guaranteed traditional specialties. We mention that the quality of some products is conferred both by the place where they were produced and by the production methods used.

Greater emphasis should be placed on the continued development of organic farming. We recall the fact that organic agriculture is a production method that preserves the structure and fertility of the soil, promotes a high standard of animal welfare and avoids the use of products authorized in conventional agriculture, such as synthetic pesticides, herbicides, chemical fertilizers or growth stimulants, such as antibiotics, or genetically modified organisms. Farmers should resort to techniques that contribute to maintaining ecosystems and reducing pollution.

The Republic of Moldova is to comply with the marketing standards for plants, plant seeds, products obtained from plants, fruits and vegetables, as well as for live animals and products of animal origin. We point out that the problems related to the non-conformity of domestic products, but also the lack of quality infrastructure, can be implicitly solved by gradually harmonizing the sanitary and phytosanitary legislation with that of the EU. Once these barriers are overcome, producers will be able to export to the EU, and consumers will have access to safe and healthy food products and will benefit from more information about potential risks and the measures they need to take to minimize them.

Even if the support of European partners is an important element in promoting the European path of the Republic of Moldova as well as in creating a positive image of the country within the European Community, we must take into account the fact that European integration is a continuous process of internal reforms, it is not only a vector of foreign policy but more importantly a vector of the state's internal policy.

As the experiences of former candidates show, the success of the Association Agreement, but also of our European integration efforts, will equally depend on such factors as the degree of convergence of the Moldovan legislation with the European one, as well as on the coherence of the actions of the Moldovan authorities on the plan internally and the will they will show in the continuation of the process of democratization of society. By strictly complying with the commitments made to the European partners, the Republic of Moldova could register an important leap in terms of reforms and achieve qualitative progress in the implementation of the Association Agreement, a fact that will determine the continued support of the EU internally and externally.

Even if Moldova is not offered the clear prospect of accession, as a result of reforms and integration into EU policies and programs, the Republic of Moldova will be a much more democratic, developed and competitive state in the international arena.

Significant efforts have been made to harmonize Moldovan agricultural legislation and standards with those of the EU:

- *Food Safety and Quality Standards*: Adoption of EU-compliant food safety regulations to improve the quality and competitiveness of Moldovan agricultural products.
- *Animal and Plant Health*: Implementation of stricter animal health and plant protection measures to align with EU phytosanitary standards.
- The government has introduced new instruments to promote sustainable agriculture and environmental conservation:
- *Agri-Environmental Schemes*: Financial incentives for farmers adopting environmentally friendly practices such as crop rotation, organic farming, and soil conservation.
- *Climate Adaptation Programs*: Initiatives to support climate-resilient agriculture, including investments in water management systems and drought-resistant crop varieties.
- Moldova has focused on improving market access for agricultural products by signing trade agreements with EU countries and implementing quality standards and certification systems to meet international market requirements. The government has also supported export promotion efforts to help farmers access new markets and increase their competitiveness.
- The government has implemented policies to attract investment in agribusiness and promote entrepreneurship in the sector. This includes providing financial incentives, creating a favorable business environment, and supporting value-added processing and export-oriented industries.
- Recommendations to strengthen national agriculture and rural development policy:
- *Development needs related to inputs and prerequisites for agricultural activity.* This refers to improving access to necessary agricultural inputs such as seeds, fertilizers, machinery, and financial resources, along with the creation of conditions (e.g., infrastructure, education) that enable effective farming.
- *Development needs related to sales markets*. This focuses on improving access to local and international markets for agricultural products, ensuring farmers have opportunities to sell their goods profitably.
- *Development needs related to community involvement in the development of rural areas*. Involving local communities in decision-making and development activities fosters sustainable growth, encourages local entrepreneurship, and strengthens the sense of ownership and responsibility for rural development.
- *The need to transpose the EU acquis and its progressive implementation in the field of agriculture, rural development and food security*. This recommendation emphasizes aligning Moldova's agricultural policies and regulations with European Union standards to enhance market integration, improve food security, and meet EU trade requirements.
- *Harmonization of the normative framework in the sanitary and phytosanitary field*. Ensuring that Moldova's sanitary and phytosanitary regulations meet international standards is crucial for preventing the spread of diseases and pests and ensuring food safety, which helps maintain trade relations with other countries.
- *Development of food production quality control laboratories*. The establishment and modernization of laboratories for testing the quality and safety of food products will ensure that agricultural productions meet the required standards, protect the health of consumers and increase exports.
- *Implementation of technologies and measures to stimulate the implementation of bioeconomy and circular economy principles*. Encouraging the use of sustainable farming practices and technologies that minimize waste, recycle materials, and use renewable resources will contribute to environmental sustainability and economic growth in agriculture.

- *Supporting environmental protection by conserving biodiversity, protecting water, soil and promoting the use of ecological agricultural practices*. Implementing sustainable farming practices that conserve natural resources, protect ecosystems, and reduce pollution will help preserve Moldova's environment and improve long-term agricultural productivity.
- *Supporting the utilization of renewable energy sources within agricultural holdings, including the use of vegetable and animal waste*. Encouraging the adoption of renewable energy solutions, such as bioenergy from agricultural waste, will reduce dependence on non-renewable energy sources, lower costs, and promote environmental sustainability within the agricultural sector.

The Republic of Moldova has implemented a range of policy changes in recent years to modernize its agricultural sector, enhance sustainability, and align with EU standards. These efforts aim to create a more competitive, resilient, and sustainable agricultural sector in Moldova. However, challenges remain, including the need for further investment in infrastructure, technology, and research, as well as addressing issues such as climate change, land degradation, and rural poverty. Continued efforts and support from both the government and stakeholders will be crucial to ensure the long-term sustainability and growth of Moldova's agricultural sector.

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