



**STRUCTURAL IMBALANCES IN ROMANIA'S AGRI-FOOD SECTOR AND VALUE CHAIN
 VULNERABILITIES**

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Abstract: This paper analyses the main structural imbalances affecting Romania's agri-food sector, focusing on farm polarisation, weak livestock integration, limited processing capacities, and low capital formation. The results highlight the persistence of a production model based predominantly on raw agricultural commodity exports and weak integration within domestic agri-food value chains. The study underlines the need for stronger vertical integration, modernization, and higher domestic value-added generation in order to improve competitiveness and resilience.

• **Introduction**

- Romania has significant agricultural potential
- Agri-food sector affected by structural imbalances
- Weak processing integration limits value added
- High dependence on raw commodity exports

• **Material and method**

- Diagnostic and comparative analysis
- INS and Agricultural Census data
- Analysis of:
 - farm structure
 - livestock integration
 - capital formation
 - processing vulnerabilities

• **Conclusions**

- ❖ structural asymmetries persist
- ❖ weak value-chain integration
- ❖ low domestic value added
- ❖ stronger processing integration needed

• **Results and discussions**

Farm polarisation

| FARM SIZE | SHARE OF AGRICULTURAL AREA |
|-------------|----------------------------|
| 0-10 ha | 38.8% |
| 10-100 ha | 12.4% |
| Over 100 ha | 48.8% |

- strong land concentration
- fragmented farm structure
- weak market integration

Livestock imbalance

| INDICATOR | VALUE |
|-------------------------------------|-------------|
| Farms >100 ha with cattle | 5.2% |
| Agricultural land without livestock | 6.9 mil. ha |

- predominance of vegetal production
- declining livestock sector

Weak processing integration

Romania: 0.7 : 1 } processed food /
 EU average: 2 : 1 } primary production

Capital formation gap

| Year | ROMANIA | FRANCE |
|------|---------|--------|
| 1990 | 23 | 263 |
| 2021 | 204 | 418 |