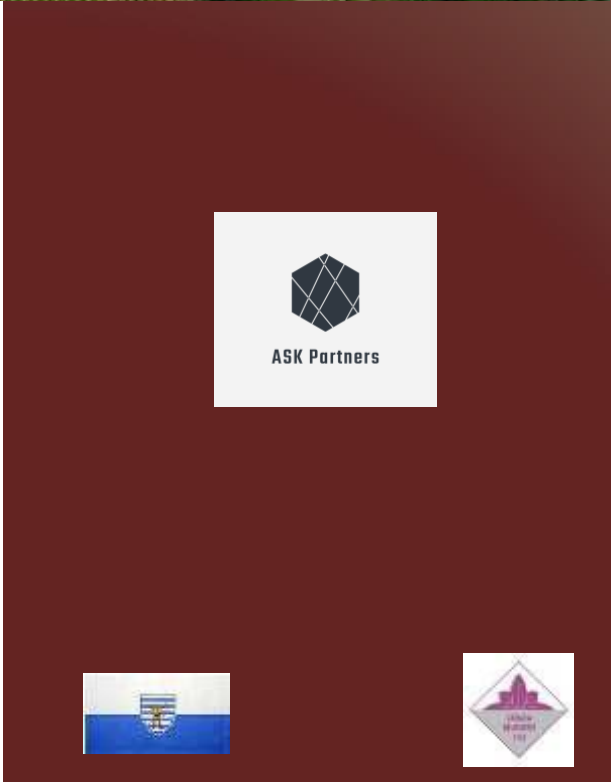




AT 1.1 Study of international trade of agricultural and connected products in the Republic of Moldova



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Abbreviations

CCASM	Climate Change Adaptation Strategy of Moldova
CEFTA	Central European Free Trade Agreement
CIS	Centralized Irrigation Systems
CIS	Commonwealth of Independent States
DCFTA	Deep and Comprehensive Free Trade Area
EU	European Union
F2F	The Farm to Fork strategy
GDP	Gross Domestic Product
GVA	Gross Value Added
IUU	Illegal, Unreported and Unregulated
MADRM	Ministry of Agriculture, Regional Development and Environment
MIEPO	Moldova Investment and Export Promotion Organization
MPA	Marine Protected Areas
NAPs	National Adaptation Plans
NDR	Northern Development Region
ONVV	The National Office of Vine and Wine
SAPs	Sectoral Adaptation Plans
SDG	Sustainable Development Goals
SDO	Sustainable Development Objectives
SNAIPE	National Strategy for Investments Attraction and Exports Promotion
SNDAR	National Strategy for Agricultural and Rural Development
UN	United Nations

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Summary

This study has been developed within the framework of the project titled “Bridges of Trade” and acronym “BRIDGES”. BRIDGES is implemented under the Joint Operational Programme Black Sea Basin 2014-2020 is co-financed by the European Union through the European Neighbourhood Instrument and by the participating countries: Armenia, Greece, Republic of Moldova, Romania and Turkey.

The aim of BRIDGES is to bring forward the high potential that the agricultural sector (including aquaculture, food industry and agro-industry) shows in the partner-regions - Nestos, EL, Galati Ro, Yerevan AM, Balti MD, Catalca TR - and to promote trade among SMEs establish strong and permanent trade links in those sectors in the project area.

In the first chapter of the study, European policies and strategies, which the project is totally in line with, are presented in a general context: the Eastern Partnership of the European Neighbourhood area, the Danube Region Strategy, the EU Blue Growth Strategy, the 2020 Europe strategy and the 2030 UN Sustainable Development Goals. All these policies have been integrated in national strategies that reflect the objectives of the EU for sustainable development.

Moldova has well integrated EU policies on Agriculture, setting a quite well management and implementation framework for this sector. This is also reflected in the figures and trends that are presented in the second chapter of the study, regarding the presentation of the agricultural sector in Moldova, while in the third chapter, the current situation in the Agricultural and agricultural products trade sectors is presented.

The trade partnerships between the participating countries, shows that the main trade partner of Republic of Moldova, regarding Export, Import and Trade Volume is ROMANIA, followed by TURKEY. And that a negative trade balance is with TURKEY (-189.7 thousand EUR).

Last, a SWOT analysis has been developed to assess the agricultural and trade sectors' strengths, weaknesses, opportunities and threats from a local/regional/national/interregional perspective.

This study constitutes the first part of a sequence of actions within the project, which will lead to the creation and establishment of a Trade Network (BRIDGES Network) of buyers, sellers, producers, cooperatives and SME's of the agricultural sector of the five (5) participating counties. The study's purpose is to identify the most significant products in the project area in order potential beneficiaries to be identified and invited to participate in the project actions.

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1. Introduction

This study has been developed within the framework of the project titled “Bridges of Trade” and acronym “BRIDGES”. BRIDGES is implemented under the Joint Operational Programme Black Sea Basin 2014-2020, which is co-financed by the European Union through the European Neighbourhood Instrument and by the participating countries: Armenia, Greece, Republic of Moldova, Romania and Turkey.

This study is the first step of a sequence of actions within the project, which will lead to the creation and establishment of a Trade Network (BRIDGES Network) of buyers, sellers, producers, cooperatives and SMEs of the agricultural sector of the five (5) participating countries. The study identifies the most significant products in the project area in order for potential beneficiaries to be identified and invited to participate in the project actions.

The Municipality of Bălți, Republic of Moldova, developed this study for the identification and presentation of the most significant agricultural products of the Northern Development Region (NDR) area, with the aim to investigate the trade opportunities that could arise through the Municipality’s participation in the BRIDGES project.

1.1. The BRIDGES objectives

BRIDGES is being implemented under Programme priority 1 “Promote business and entrepreneurship within the Black Sea Basin” and Specific Objective 1.2 “Increase cross-border trade opportunities and modernisation in the agricultural and connected sectors”. Thus, the aim of BRIDGES is to bring forward the high potential that the agricultural sector (including aquaculture, food industry and agro-industry) shows in the partner-regions - Nestos EL, Galati Ro, Yerevan AM, Balti MD, Catalca TR - and to promote trade among SMEs establishing strong and permanent trade links in those sectors in the project area.

The project is totally in line with European policies and strategies and by integrating their objectives into the project’s activities, the partnership ensures the achievement of the aim to develop and establish trade links among the partner-countries.

The project contributes to the Eastern Partnership of the European Neighbourhood area and more specifically to the following deliverables for 2020: a) 4. Improve the investment and business environment and unlock Small and Medium-sized Enterprises’ (SMEs) growth potential, b) 8. Support intra-regional trade among partner countries and the EU and c) 18. Strengthen investment in young people’s skills, entrepreneurship and employability.

The project also contributes to the Danube Region Strategy and to the following Pillars and Priority Areas (PA): PA08 “To support the competitiveness of enterprises”, PA09 “Investing in people and skills” and PA10 “Stepping up institutional capacity and cooperation”.

Moreover, it contributes to the EU Blue Growth Strategy by including in the project the Aquaculture sector, which shows high potential for sustainable jobs and growth and by promoting cooperation among partner countries and skill development of people in the aquaculture sector.

BRIDGES, aiming in promoting international trade links, networks and partnerships in the partners’ regions and support the internationalisation of exchanges, is also in line with the Europe 2020 strategy’s priorities and competitiveness flagship initiatives (CFIs):

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- Priority: "Sustainable growth" □ CFI: "An industrial policy for the globalisation era, to improve the business environment, especially for SMEs, and to support the development of a strong and sustainable industrial base able to compete globally"
□ Measure: "Supporting entrepreneurship to make European business fitter and more competitive";
- Priority: "Inclusive growth" □ CFI: "Agenda for new skills and jobs, to modernise labour markets by facilitating labour mobility and the development of skills throughout the lifecycle with a view to increase labour participation and better match labour supply and demand" □ Measure: "Helping people acquire new skills, adapt to a changing labour market and make successful career shifts"

Last, BRIDGES contributes to the 2030 UN Sustainable Development Goals (SDGs) and more specifically to the following:

SDG 8 - Decent work and economic growth: To promote high standards for working conditions and actively help the EU partner countries to address informal work, especially in sectors with the strongest multiplier potential for the partner countries' economy, such as agriculture and energy.

SDG 10 - Reducing inequality: To reduce inequality, EU supports actions to:

- empower women and create opportunities for youth and disadvantaged communities;
- increase economic inclusion and create decent work and higher incomes;
- encourage domestic resource mobilisation and stimulate public and private sector development.

SDG 11 - Sustainable Cities and Communities: To support urban and peri-urban areas in EU partner countries and therefore to address aspects that can improve the quality of life in cities. It combines diverse efforts related to access to water and sanitation, urban mobility, affordable and sustainable housing, energy efficiency etc. Moreover, given their concentration of people, cities are particularly vulnerable to climate change and disasters, which is why EU also help them build their resilience to minimise potential human and economic losses from future shocks.

SDG 14 - Life below water: Through actions at global, regional, national and local level, the EU development policy supports notably:

- improved fisheries management and the fight against illegal, unreported, and unregulated (IUU) fishing to secure oceans' contribution to food and nutrition security
- conservation of marine and coastal ecosystems notably through the establishment and support of marine protected areas (MPA)

SDG 17 - Partnerships for the Goals: To increase international cooperation and strengthen global partnerships at governmental level, including through public-private partnerships and the involvement of civil society. This should help developing countries to:

- strengthen domestic resource mobilisation, including through international support;
- mobilise additional financial resources from multiple sources;
- attain long-term debt sustainability through coordinated policies aimed at fostering debt financing.

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Figure 1: 2030 UN Sustainable Development Goals (<https://www.un.org/>)



All these policies have been integrated in national strategies that reflect the objectives of the EU for sustainable development. The agriculture is one of the primary economy sectors, along with forestry and fishing, mining, and extraction of oil and gas, characterised by making direct use of natural resources. Agriculture is usually most important in less developed countries, and typically less important in industrial countries, creating a pattern of product and services exchange between them. Here comes trade, which bridges the gap among countries or/and regions which produce and those which consume. BRIDGES investigates among others, the achievement of a balance, promoting at the same time both production and trade in the participating countries.

NDR, as a region, with high land productivity, produces specific products which are very indicative for the region. However, the business support organisations of the area need to build further their capacity in order to promote the local products into new markets in the Black Sea Basin area. Understanding of EU and national policies is a first step to understand the needs and trends of the international market and trade, in order SMEs and employed in the agricultural and trade sectors to be able to act collectively and become more competitive to the international market.

1.2. National Strategies on Agricultural production

Agriculture is one of the key sectors that supports Moldova's sustainable development by providing jobs, especially for the rural population, being as well an essential source of input for the Moldovan Food industry and exports. Compared to other European countries, Republic of Moldova has a greater share of population in rural communities/areas, where agriculture is one of the main income sources, playing an important role both economic and social, with direct impact on the welfare of the population. Therefore, success in achieving the objectives of the 2030 Agenda depends on the implementation of the SDG (Sustainable Development Goals) on agriculture.

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At the same time, the Ministry of Agriculture, Regional Development and Environment (MADRM) is the institution responsible for implementing and monitoring the Sustainable Development Goals related to agriculture and environment, as well as identifying targets, adjusting policy planning documents and monitoring indicators.

Moreover, according to MADRM, the main goal is to ensure the consequent development and promotion of state policy of sustainable development of Agro-industrial sector of the country, by increasing competitiveness and productivity in the sector along with ensuring the national Food safety and security aimed to create indispensable prerequisites for improving the economic and social welfare.

National strategies and policies on agricultural and rural development are constantly updates to respond to the developing global situation. Moreover, the general objectives that define the priorities of the agricultural sector are aligned with the objectives of the Common Agricultural Policy of the European Union. While consolidating the achievements so far, Republic of Moldova is fully committed to setting agricultural sector onto a sustainable growth path and enhancing the preservation of agricultural biodiversity.

The following Strategies have been created by the Moldovan government for the agricultural production:

- **National Development Strategy “Moldova 2030”¹** (2019) is the principal strategic document of the country that defines the key priorities and overarching thrusts of government policy, stating the specific direction of sustainable development of the whole country and society for the period until 2030. This document contributes to the strategic allocation of budgetary and institutional resources, according to the long-term national development objectives aimed to support the following basic 4 pillars of sustainable development:

- 1) Sustainable and inclusive economy;
- 2) Strong human and social capital;
- 3) Fair and efficient institutions;
- 4) Healthy environment.

In order to enforce the development of this fields, 10 sustainable development objectives (SDO's), including guaranteeing quality education, ensuring effective governance, increasing people's access to infrastructure and improving working conditions.

Moreover, the Strategy determines the vision and the overall goals of development policies in all sectors of state governance, including their territorial dimensions. It is aligned with both its EU AA and the United Nations' 2030 Agenda for Sustainable Development. Long-term development scenarios have been identified and analyzed with the support of the UN and the World Bank.

According to the Strategy 2030, Agri-Food sector has great untapped potential, being the most important indigenous sector that will remain among the growth drivers of Moldovan economy in the near future. Moldova's Agri-Food sector spans a wide range of industries—from primary agriculture to food and beverage processing. As the sector faces intense competitive pressures in global and domestic markets, the Strategy's central sectorial objectives are to increasing the overall competitiveness, to ensure the sustainable management of natural resources in agriculture and improve the living standards in rural areas. Although, according to the basic development scenario the food and beverage industry - closely connected through inter-branch links to the agricultural sector and the rural areas development will grow at a slower pace, as agriculture will face a chronic lack of investment and human capital together with unfavorable climate changes². Thus, one of the sustainable development objectives SDO's 2 (Eradicating hunger, ensuring food security, improving nutrition and promoting sustainable agriculture) strongly connect to agricultural branch

¹ https://www.legis.md/cautare/getResults?doc_id=121920&lang=ro

² https://cancelaria.gov.md/sites/default/files/viziunea_snd_2030_clean.pdf

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plays a key role in increasing the well-being of the population, considering the fact that about a third of the workforce is employed in the agricultural sector, as a result, increasing incomes and improving the quality of life of this category of population will have considerable effects on the whole country. It will also reduce to reduced geographical disparities in living standards in villages and towns, and will help eradicate poverty, as most people connected to agriculture live in rural areas and more exposed to the risk of poverty.

- **National Agriculture and Rural Development Strategy for 2014-2020³** - approved by the Government on June 4, 2014 is still in force, but outdated. The Strategy aimed to achieve the synergy between the agriculture, environment and rural development, ensuring the comprehensive restructuring and modernization for a competitive agri-food sector that contributes to the sustainable achievement of the national economic and social development objectives. In this regard, the strategy emphasis on the key general objective to increase competitiveness of the agri-food sector and meet EU requirements regarding food safety and quality through modernization of agri-food chain, development and alignment of national education systems with sector requirements, improvement of farmers' access to capital, inputs and output markets. In the sense of supporting the Strategy implementation, the Action Plan was approved by Government Decision no. 742 of October 21, 2015. About 76% of the measures in the Action Plan of the National Strategy for Agricultural and Rural Development for the years 2015-2020 (SNDAR) have been completed on time. As a result of the evaluation of the Strategy implementation the MAIA 2020 highlight four key dimensions of the implemented actions: relevance, efficiency, effectiveness and impact. As stated in the report it was established that in terms of financial coverage, for the period 2014-2020 there were sufficient financial means to achieve the objectives stated in the Strategy, but the main challenge of Moldovan agricultural sector, both during the implementation of the Strategy and further development steps, still are unpredictable climate change and its negative effects on the whole branch.

Therefore, to expedite the transition process to a new development stage a National Agriculture and Rural Development Strategy for 2022-2027 (SNDAR) will be adopted in near future. This country strategic document will fully support the National Development Strategy "Moldova 2030" in the context of EU approximation process, including agricultural policy developments in order to ensure food security and safety at the national level. National Strategy for the Agriculture and Rural Development for 2022-2027 aims to provide a decent income for farmers; support farmers to mitigating climate change and build climate resilience; support for generational renewal; increasing competitiveness; ensure environmental protection through agri-ecological schemes; underpin dynamic development of the rural areas; restore balance in the food chain, landscape conservation and biodiversity; ensure food quality and health protection.

The new Strategy will ensure the alignment of national agricultural and rural development policies with the goals of the Common Agricultural Policy: ensuring a stable and equitable economic future for farmers; setting ambitions environment and climate action.

In this respect, SNDAR for 2022-2027 is designed to insure the achievement of 4 general objectives:

- OG1. Strengthening the potential of the climate resilient in the agricultural sector;
- OG2. Promoting smart, efficient and sustainable agricultural practices;
- OG3. Developing the local market and increasing the export potential;
- OG4. Supporting sustainable rural socio-economic development.

The economic impact expected, assuming the overcoming of COVID-19 and the relaunching of pre-pandemic global economic processes, according to this scenario in the period 2022 - 2027, a fairly rapid recovery of the economy is anticipated, followed by an annual growth of 4-4.2%. Public investment in the agricultural sector will continue to perform its historical growth trend and by 2027 will register an annual level of 3 billion MDL annually. At the same time, removing bureaucratic barriers, increasing the added value in

³ https://www.legis.md/cautare/getResults?doc_id=76222&lang=ro

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agriculture and labor productivity, is expected that the share of private investment in the total sector investment will increase up to 13 billion MDL by 2027, which means that the total value of investments in the agricultural sector will be approx. 4.63% of GDP compared to 1.66% in 2020.

In conclusion, the new Strategy priorities are still committed to the planned directions: reducing poverty in rural areas by creating favorable conditions for increasing the incomes of the poorest members of rural society; increasing the competitiveness of the agri-food sector; adaptation of agricultural producers to climate change; stimulating the growth of strategic and business agricultural activities in rural areas.

- **The National Strategy on Food Safety for the Republic of Moldova 2017-2022⁴** - the Strategy is well aligned with NARDS and assumes the harmonization of national regulatory frameworks, with EU regulation and laws in the sphere of food safety. The top priority is directed to ensuring high level of consumer security through improving the quality and safety of food products by ensuring industry compliance with EU-standards through implementing the DCFTA. Also, Republic of Moldova is looking forward adopting sustainable consumption & production patterns as well as promoting social and economic development within the carrying capacity of ecosystems. The Farm to Fork strategy (F2F) is an integrated part of Moldovan food safety policies being, stated by Law no. 113 from 18th May 2012. The F2F strategy aims to accelerate Moldovan transition to a sustainable food system and to increase competitive advantage of local agri-food value chains through strong cooperation between producers, processors, marketers, importers, exporters, food service companies, retailers and supporting groups such as shippers, research groups and suppliers. Therefore, it will cover the safety and quality of food and feed, plant health, animal health and welfare. Additionally, The National Program for Monitoring the Pesticide Residues⁵ and Nitrate Content in Foods of Vegetal Origin 2015-2020 implemented by the National Food Safety Agency are supporting same objective to achieve the highest level of protection of human health and consumer interests in terms of safety of food.

- **Strategy for Biological Diversity of Moldova 2015-2020⁶** - a national sectorial ambitious strategy to protect nature and reverse the degradation of ecosystems. The overall objective of the strategy is to decrease the current loss rate of biodiversity as a contribution to reducing poverty and as a benefit to all forms of life on earth.

The document plans to achieve it by ensuring sustainable management and efficient institutional framework for biodiversity conservation until 2020 through developing the normative framework on biodiversity conservation; providing an efficient institutional framework for the sustainable management of biodiversity; and ensuring the integration of international treaty requirements into national biodiversity policies. In addition, by 2020, it aims to, reduce the pressure on biodiversity to ensure sustainable development through ensuring the extension of state protected natural areas to up to 8% of the surface area of the country, establishing a national ecological network and develop 44 management plans for protected natural areas; ensuring the conservation of rare, vulnerable and endangered species by restoring the habitats of 5 endangered plant and 5 endangered animal species; and implementing biological security measures by developing 2 risk assessment procedures for the introduction of genetically modified organisms in the environment and the establishment of an advisory center.

- **Climate Change Adaptation Strategy of Moldova (CCASM,2014)⁷** - its first national strategic framework aimed to advance the resilience of the country's social and economic development processes. Approved by the Moldovan government in 2014, CCASM is designed to serve as an umbrella document that guides and aligns all planning and monitoring sectorial systems, moreover it provides a supportive

⁴ https://www.legis.md/cautare/getResults?doc_id=102500&lang=ro

⁵ https://www.legis.md/cautare/getResults?doc_id=114713&lang=ro

⁶ https://www.legis.md/cautare/getResults?doc_id=66444&lang=ro

⁷ https://www.legis.md/cautare/getResults?doc_id=49220&lang=ro

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environment for specific sectors, ministries and Local Public Authorities to mainstream climate change adaptation and risk management into existing and future strategies through both National Adaptation Plans (NAPs) and Sectoral Adaptation Plans (SAPs).

The specific objective of CCASM is to assure support in the development of climate resilience by reducing at least by 50% the climate change vulnerability and facilitate climate change adaptation in six priority sectors agriculture, water resources, forestry, human health, energy and transport by 2020.

This initiative is endorsed by a long-term financial strategy which includes domestic public resources, supplemented by international assistance. Other national strategies supporting climate change adaptation are the Strategy of Biological Diversity for 2015-2020 and the National Environmental Strategy 2014-2023.

- **Water Supply and Sanitation Strategy (2014-2028)⁸** - the Strategy seeks to ensure a gradually increased access to safe water and adequate sanitation for all population and communities of the Republic of Moldova. The Strategy aims to implement the water safety plans and to ensure conformation to the quality requirements as provided by the Directive 98/83/CE on the water for human consumption. According to the Environmental Strategy for 2014-2023 and the related Plan of Actions, by 2023 - 80 % of the population will have access to safe systems and services for water provision, while about 65 % of the population will be guaranteed access to sanitation systems and services. The Strategy also intend to improve the quality of at least 50 % of surface water by implementing the hydrographic basins management system.

- **Strategy for the Development of Rural Extension Services 2012-2022⁹** - the Strategy was approved through the Government Decision No. 486 from 5 July 2012. The main goal is oriented towards continuous improvement of the life quality in rural areas. Particularly, rural economic development should be achieved increasing the productivity in agricultural sector, enhancing the competitiveness of the agro-industrial sector and generating high added value, leveraging innovation knowledge and provision of rural extension services. The strategy foresees a rapid transition to a modern model of organization of rural extension services (Government of the Republic of Moldova, 2012).

In order to implement the above listed Strategies and to support the sustainable development of Moldovan Agricultural sector following programs were designed:

- **Land Reclamation Program to ensure sustainable soil management for 2021-2025¹⁰**, including the Action Plan for its implementation for during 2021-2023 approved by Government Decision nr.864/2020 is a nationwide policy document developed to prevent and to reduce soil degradation and erosion, as well as increasing soil fertility by upgrading and extending the land improvement system implementation of modern technologies and environmentally friendly agricultural practices. The Program provides an integrated approach to agricultural education, research and extension which would respond to the priorities of the agricultural sector, preventing and combating soil erosion (2.5 thousand hectares of agricultural land), reclamation of soils on 68.5 thousand hectares of agricultural land, preserving and increasing soil fertility on an area of 5 thousand hectares of agricultural land. The total budget of the program is 4 billion MDL, only 1% of which or 278.3 million MDL will be allocated from the state budget, the rest of the funds will be attracted from external sources. 98% of the total budget will be used for soil reclamation.

The program will be implemented in two stages:

- 1) Action plan for 2021-2023- with a total budget of 164.5 million MDL aimed to implement a set of measures, including reduction of soil erosion; specific work to compensate for the moisture deficit by irrigating land; removing excess water from the soil and its surface (drainage); construction and operation of hydraulic structures; restoration of alkaline and salty soils.

⁸ https://www.legis.md/cautare/getResults?doc_id=49191&lang=ro

⁹ https://www.legis.md/cautare/getResults?doc_id=48105&lang=ro

¹⁰ https://www.legis.md/cautare/getResults?doc_id=125027&lang=ro#

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- 2) Action plan for 2024-2025 will be developed later.

The Program outlines a wide range of objectives responding to key agricultural soil issues and challenges and measures to be implemented:

- 1) protection of soil against water and wind forces and its adverse impacts (set of activities for the prevention and control of soil erosion);
- 2) restoration (replenishment) of moisture deficit in the soil (measures that includes irrigation of soil);
- 3) prevention or removal of excess water from the soil/surface of the soil (measures which includes drainage and soil reclamation);
- 4) soil restoration (set of measures that includes works on construction and operation of waterworks, selective removal of the soil layer and reclamation of damaged or degraded land, reclamation of alkaline and saline soils);
- 5) soil conservation works;
- 6) planting of crops to cover the soil in winter;
- 7) arrangement and maintenance of buffer zones sown with grass;
- 8) construction/reconstruction on irrigated agricultural land of sloping fields;
- 9) use of organic material (natural manure);
- 10) transition to environmentally friendly agriculture;
- 11) rotation of crops and an increase in livestock.

- **Program for Conservation and Enhancement of Soils Fertility for the years 2011-2020¹¹** - approved by Government decision Nr. 626 of 20.08.2001, the Program's overall long-term objective is the preservation of the quality and productive capacity of the soils for assuring national food security. The main specific medium-term key objectives are to create an Automated Information System of the soil quality state based on monitoring and to apply fertility conservation measures and techniques on an area of 1.7 thousand hectares up to 2020. The techniques considered include: no-tillage technologies, use of anti-erosion crops, and the compensation of the humus losses through wider use of the organic fertilizers. Moreover, it provides institutional and legislative framework support for an integrated approach to sustainable management of agricultural soils in the country. The Program is a supportive document, that ensures coordinated efforts of the local and central public authorities in promoting and implementing a unique state policy for planning, organizing rational soil and land exploitation and protection, developing a complex of measures grounded and scientifically argued for enhancing soil fertility and improving institutional and legislative framework for land relations regulation. The Program is supported by an Action Plan (Annex to the Program) which contains a complex of measures to combat all the forms of soil degradation and implementation of environmentally safe farming methods to increase soil fertility, use as organic fertilizer manure and green manure, application of minimum tillage and no-tillage. It is stated that amelioration works and creating pastures can be made annually on an area of 15 thousand ha.

- **National Program for Regeneration and Afforestation of the Forest Fund 2003-2020** - approved in 2003¹², Moldovan Government outlined the objective to increase the forest area up to 15% by 2020, improving the condition of existing forests as well. Several specific policies have been approved over the last decade to accomplish this objective, which equals to planting about 130,000 hectares of forestry vegetation by 2020.

- **Program for Resettlement/Restoration and Development of Viticulture and Winemaking 2002-2020¹³** - approved by Decree of the Government of the Republic of Moldova No. 1313 of October 7, 2002, is one of the most important Program designed for sustainable development of Moldovan wine sector. The

¹¹ https://www.legis.md/cautare/getResults?doc_id=21540&lang=ro

¹² https://www.legis.md/cautare/getResults?doc_id=72688&lang=ro

¹³ https://www.legis.md/cautare/getResults?doc_id=10510&lang=ro

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document outlines the fact that this sector still remains a top-priority branch that ensures the economic security of the country with a significant direct contribution to Moldovan gross domestic product (GDP), total exported value and employment in the country, as well as indirect contribution through other businesses related to supply of goods and services required for grape growing, wine making and the wine tourism experience. The main goal highlighted is the restoration and development of a modern and highly competitive industry focused on the production of high-quality grape and wine products, in order to boost the competitiveness of Moldovan wine production in the foreign markets and to achieve high economic efficiency.

During this period, the land area under vineyards in Moldova should reach 100- 120 thousands ha by 2020. Subsequently, the volume of grape processing is expected to increase to 430 thousand tons in 2015 and 600 thousand tons in 2020. At the same time, the volume of raw wine production, will increase up to 28 million decaliters in 2015 and 39 million decaliters in 2020. At the end of this period will be manufactured: bottled wine - 15 million decaliters, bulk wine and sparkling wine - 15 million decaliters, divine - 600 thousand decaliters and brandy- 1400 thousand dal.

An important objective stated and achieved with the Program in 2013 was the foundation of The National Office of Vine and Wine (ONVV)- an institution based on public-private partnership, responsible for implementing sectorial state policies and managing the Vine and Wine Fund (FVV valued at 3.2 million USD, primarily used for the campaign of the newly-launched national brand.) ONVV activity is focused on 3 strategic areas: promotion of the wine products' image on the domestic and export markets, improvement of the wine sector's competitiveness and consolidation of institutional capacities of the institution.

In 2019, ONVV launched the prospective study for the development of the National Wine Sector Development Program "Moldovan Wine - 2030"¹⁴, initiated at the request of MADRM and the wine sector, being fully coordinated and monitored by the ONVV team of experts. As a result, a new Wine Development Strategy intitled "WINE OF MOLDOVA 2030" was proposed. To be mentioned that 16 international experts from 5 countries (New Zealand, France, Italy, Great Britain, Australia) were involved in the elaboration of the document, but also local experts, including representatives of the "Livada Moldovei" Project, who also offered financial support to the elaboration of the strategy. The new national policy is based on a detailed sector analysis and recent years trends. According to the Strategy, the Moldovan wine sector vision is to become internationally well-known for innovative and high-quality premium wines and spirits, which will contribute to an increase of total sector export value amounting up to 500.0 million EUR by 2030.

The vision will be achieved by implementing six specific high-level strategic objectives, each of which refers to a chapter of the Strategy:

- 1) Vineyards offer alignment in line with international demand trends (development of new vineyards, planting varieties that are better adapted to current consumer taste preferences and market demand, as well as indigenous varieties);
- 2) Wine production alignment with the globally demanded wine varieties, as well as elimination of excess stocks (grow production of wines with PGI, align the styles and variety of wines with global standards);
- 3) Solving the issues in wine distillates production (grow production of products with PGI, development of marketing strategy);
- 4) Building a clearly defined Marketing Position for Moldovan wine by refocusing on the Moldovan brand identity and reorganizing the marketing activities of ONVV;
- 5) Building a fully integrated education, research and technology transfer system;
- 6) Restructuring the legal, regulatory and institutional framework (by introducing a modern control system, eliminating non-essential rules for PGI and non-PGI wines, improving law enforcement systems and

¹⁴ <https://wineofmoldova.com/wp-content/uploads/2021/02/RAPORT-ANUAL-2019.pdf>

developing a new legal basis for ONVV that would give it representation and autonomy). In result by 2030 is expected to grow the vineyards areas intended for the production of premium quality wine / wine distillates from 10,9 thousand ha in 2020, to 25 thousand ha in 2030, the quantity of grapes processed at wineries will increase from 215 thousand tones to 350, the share of premium quality wine sold in the global sales will increase from 10 to 40%, average export price of wine rise from 0,98 to 3 EUR per liters. In conclusion, after then productive years the estimated contribution of the overall wine and wine tourism sectors to GDP will amount 3.5 billion EUR, compared to 400 million EUR in 2020.

For strengthening the policy framework for the agri-food sector, The Minister of Agriculture and Food Industry of Moldova has prioritized a wide action plan for 2022 agenda to develop and to promote a series of strategic policy documents, examined in several meetings with relevant associations in order to update and to shape the framework around specific sector needs and capabilities:

- 1) National Strategy for Agricultural and Rural Development 2022-2027;
- 2) Development program of the wine sector of the Republic of Moldova 2030;
- 3) Milk production sector development program;
- 4) National program for the development of the milk production sector;
- 5) National program for the development of the meat production sector;
- 6) National program for the development of the aquaculture sector;
- 7) National program for the development of the sheep and goat sector;
- 8) The program regarding the development of the hydro-improvement sector;
- 9) Law on organic agri-food production and labeling of organic products.

1.3. National Strategies on International Trade

International trade is one of the main drivers behind the global economy growth. The path to the development of any economy is to embrace the new opportunities spinning out from the global trade and building up strong relationships with international trading partners.

Following the recent crisis, it was realized that trade could be a stabilizing force in these uncertain times, as trade can mitigated the negative effects of the economy recession by shifting to the demand from growing economies. Trade will be an even more important source of growth in the future.

Sustainable growth and economic prosperity through exports needs an integrated approach through development of clear export strategies nationally adopted and implemented, as well as the government commitment invested in the process to create an enabling environment and framework support for the trade and exportation. National export strategies are a strategic document that stimulates the effectiveness of export promotion activities.

As intended, the National Strategy for Investments Attraction and Exports Promotion (SNAIPE) 2016 - 2020¹⁵ aimed at attracting investments in the national economy and export growth, which will ensure the sustainable development of the Republic of Moldova. It was stipulated that the objective of growth and diversification of exports should be correlated with that of improving the investment activity.

The strategy defines and establishes the vision, objectives and measures needed to be achieved in order to create conditions for improving the investment and export environment in the Republic of Moldova. The main objective of the Strategy is the rapid exploitation of the export potential of the Republic of Moldova, mainly by attracting foreign investments.

¹⁵ https://www.legis.md/cautare/getResults?doc_id=92287&lang=ro

This will allow to reduce the technological gap of the Republic of Moldova and will contribute to the creation of new, more decent and productive jobs in the export-oriented sectors, with priority being:

- the external maintenance services of the business processes;
- the machinery industry and the electrical equipment for the automotive industry;
- the electronics industry;
- the clothing and footwear industry;
- the development of computer programs;
- the agricultural sector and the food industry.

It is likely that the adjustment of the institutional framework to external realities was more latent than the normative adjustment. The creation of the Moldova Investment and Export Promotion Organization (MIEPO) is decided in 2014 by the transformation of the Export Promotion Organization. The mission of the newly created organization was synchronized with the evolution of the national strategic framework, where the export-investment link is a priority. After more than 3 years of activity, in the context of implementing the Public Administration Reform Strategy, MIEPO is reorganized by merging with the Tourism Agency. The newly created organization is the Investment Agency, a central administrative authority subordinated to the Government, with the task of implementing state policies in the areas of promotion, attracting and locating investments, promoting export and tourism, strengthening economic diplomacy and promoting the image of the country.

In conclusion: All the National Strategies and Programs recently developed by the Government of the Republic of Moldova highlight the structural reform process initiated by the country and policy alignment with the EU, following implementation roadmap of the Association Agreement and DCFTA. The Moldovan Agricultural framework was enforced with a toolbox of broad policy reforms, action plans and targeted measures to support the transition towards sustainable agriculture and rural area, inspired by EU Common Agricultural Policy. In recent decades, the outcomes of these initiatives' implementation have naturally reflected in the key trends and macro-economic indicators presented in the next chapters.

Moreover, the second chapter will be dedicated to an in-depth overview Agriculture sector and its contribution to Moldovan economy, comprehensive data and key agri-food industry statistics accompanied with narrative analysis.

The third chapter outlines the evolution of international trade performance of the Republic of Moldova, with a comprehensive analysis focused on the trade results with agri-food products, as well as the dynamic of bilateral trade between Moldova and Bridges project countries. This paper also, brings data available for the Northern Development Region of Moldova, which reconfirms the national and regional trends.

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2. Agricultural Sector in the Republic of Moldova

In this chapter, the trends regarding the state-of-the-art in the Agricultural sector in Republic of Moldova are presented.

2.1. Agricultural area

Moldova is a small country in Eastern Europe. The rich soil and temperate continental climate with warm summers and mild winters have made the country one of the most productive agricultural regions since ancient times, and a major supplier of agricultural products in Southeast Europe. Moldova's fertile soil produces fruits, vegetables and cereals. One of the country's most important industries is the wine industry, for which the Republic of Moldova is known far beyond its borders.

Total land area of Republic of Moldova constitutes 3 384,7 thousand hectares (table 1), of which 73.6% is agricultural land, while the Forests and lands covered with forestry vegetation is 13.8%, Other lands - 9.7%, Lands provided with Irrigation facilities - 6.4% and Rivers, lakes, reservoirs and bogs - 2.9%.

Table 1: Agricultural land use in the Republic of Moldova, 1 January 2020, thousand ha

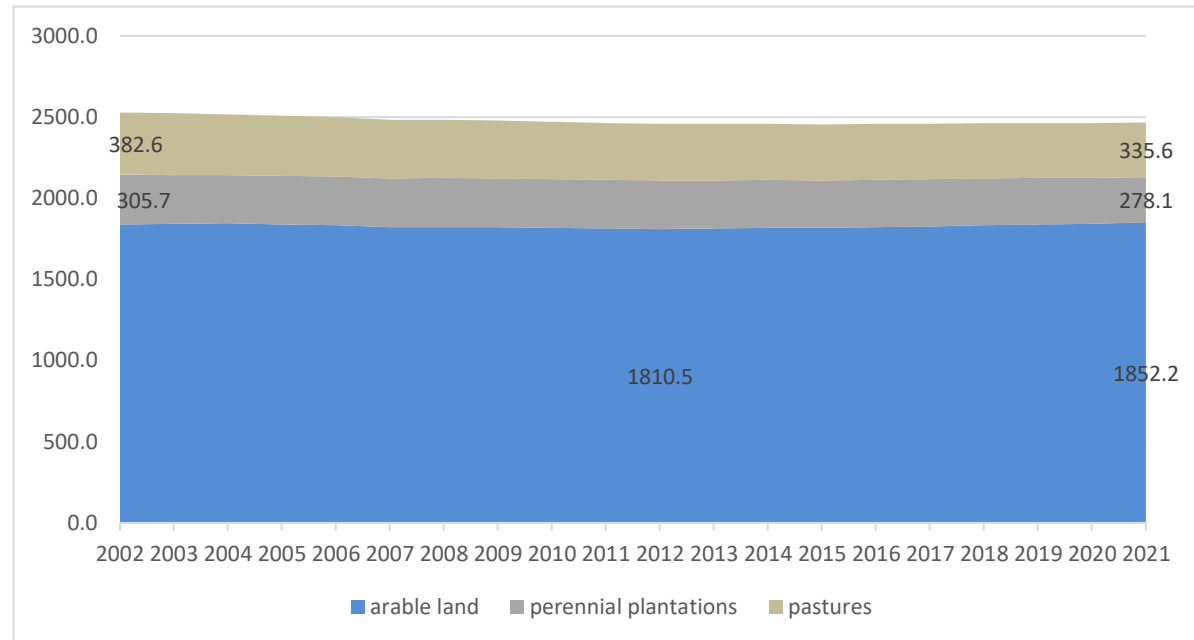
	Area, thousand ha
Land area, total, of which:	3.384,7
Agricultural lands, of them:	2.491,7
arable land	1.852,2
perennial plantations, of which:	278,1
orchards	127,6
vineyards	126,2
pastures	335,6
hayfields	2,1
fallow lands	23,8
Forests and lands covered with forestry vegetation	467,8
Rivers, lakes, reservoirs and bogs	96,5
Other lands	328,6
Lands provided with Irrigation facilities, of which:	217,9
arable land	203,7
perennial plantations	13,0

Source: National Bureau of Statistics

The total agricultural land of Republic of Moldova in 2020 was 2 491.7¹⁶ thousand hectares (Figure 2). Most of the agricultural land is Arable land (73.4% or 1 852.2 thousand hectares) which has a 2% increase compared to 2011. Pastures constitutes 13.5% or 335.6 thousand hectares, Perennial plantations (slightly decreasing by 6.9% since 2011) is 11.2% or 278.1 thousand hectares, of which orchards constitutes 127.6 thousand hectares and vineyards - 126.2 thousand hectares (decreasing with 15.6% since 2011), 1.0% - Hayfields and 0.1% - Fallow lands.

¹⁶ https://statistica.gov.md/public/files/publicatii_electronice/Anuar_Statistic/2021/16_AS.pdf

Figure 1: Agricultural land in Republic of Moldova, 2002-2021 (National Bureau of statistics)



Source: National Bureau of Statistics

2.2. Agriculture and Economy

Agriculture has always been one of the leading sectors in the Moldovan economy, largely for natural reasons: the rich soil resources, biological diversity, good climate, and geographical conditions.¹⁷

The gross domestic product (GDP) in 2020 reached 9.7 billion EUR, with a subsequent decline of 7% or 4.4 billion EUR compared to 2019, placing Moldova among the countries in Europe most affected by COVID, which significantly impacted households and businesses across the country.¹⁸

Table 2: Gross value added (GVA) of the Agricultural Sector in GDP, 2016 - 2020

	GDP (thousand EUR, current prices)	GVA of Agriculture, forestry and fishing (thousand EUR, current prices)	Share of Agricultural GVA in Total GVP, %
2016	7.698,3	877,5	11,4%
2017	8.764,4	1.005,5	11,5%
2018	9.861,5	1.012,9	10,3%
2019	10.922,8	1.111,0	10,2%
2020	9.768,7	940,2	9,6%

Source: National Bureau of Statistics

¹⁷ [https://invest.gov.md/attached_files/2021/03/04/02020_Food%20Processing%20&%20Livestock%20overview%20Brochure%20\(ENG\).pdf](https://invest.gov.md/attached_files/2021/03/04/02020_Food%20Processing%20&%20Livestock%20overview%20Brochure%20(ENG).pdf)

¹⁸ <https://statistica.gov.md/newsview.php?l=ro&idc=168&id=6940>

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The total gross value added per economy, with a share of 87.0% in GDP formation, the volume of GVA being decreasing by 6.9%. Agriculture, forestry and fishing (they contributed -2.7% to the decrease of GDP), with a share of 9.6% to the formation of GDP and a decrease of the GVA on the respective activities by 26.4%.¹⁹ (Table 2)

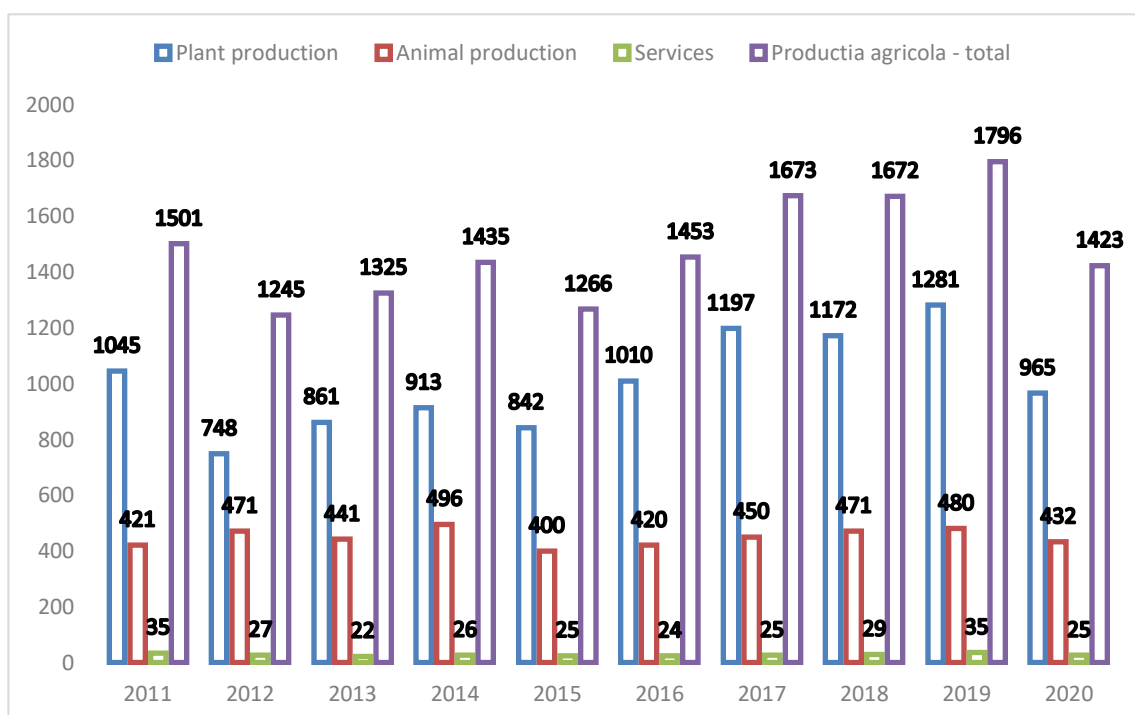
Table 3: Gross value added (GVA) of the Agricultural Sector in total GVA, 2016 - 2020

	GVA - total (thousand EUR, current prices)	GVA of Agriculture, forestry and fishing, (thousand EUR, current prices)	Share of Agricultural GVA in Total GVA, %
2016	6744,41	877,5	13,0%
2017	7585,27	1.005,5	13,3%
2018	8527,76	1.012,9	11,9%
2019	9505,16	1.111,0	11,7%
2020	8513,15	940,2	11,0%

Source: National Bureau of Statistics

Moreover, the total production value of the agricultural sector, which includes plant production, animal production and services reached 1.4 billion EUR in 2020, showing a decrease compared to 2019 by 20.8%.²⁰

Figure 2: Global agricultural production in current prices, million EUR



Source: National Bureau of Statistics

In addition, the total income from agricultural enterprises in Republic of Moldova (at current prices) amounted to 756.1 million EUR in 2020, increasing by 35.0% in the last 5 years, like the number of

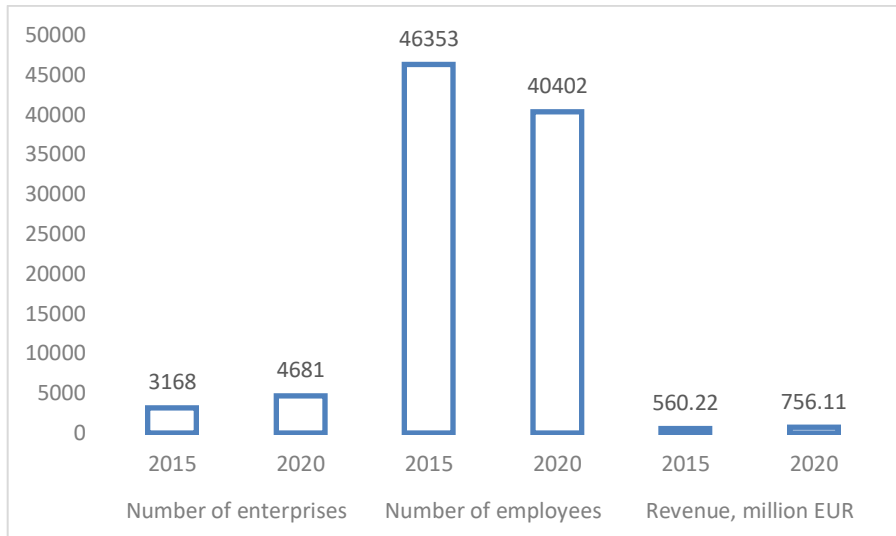
¹⁹ <https://statistica.gov.md/newsview.php?l=ro&idc=168&id=6940>

²⁰ https://statbank.statistica.md/PxWeb/pxweb/ro/40%20Statistica%20economica/40%20Statistica%20economica_16%20AGR_AGR010/AGRO10100.px/table/tableViewLayout1/?rxid=9a62a0d7-86c4-45da-b7e4-fecc26003802

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agricultural entities (47.8% compared cu 2015), while the number of employees in the agricultural sector has decreased by 12.8%, compared to 2015. (Figure 3).²¹

Figure 3: Overview of agricultural sector, unit base



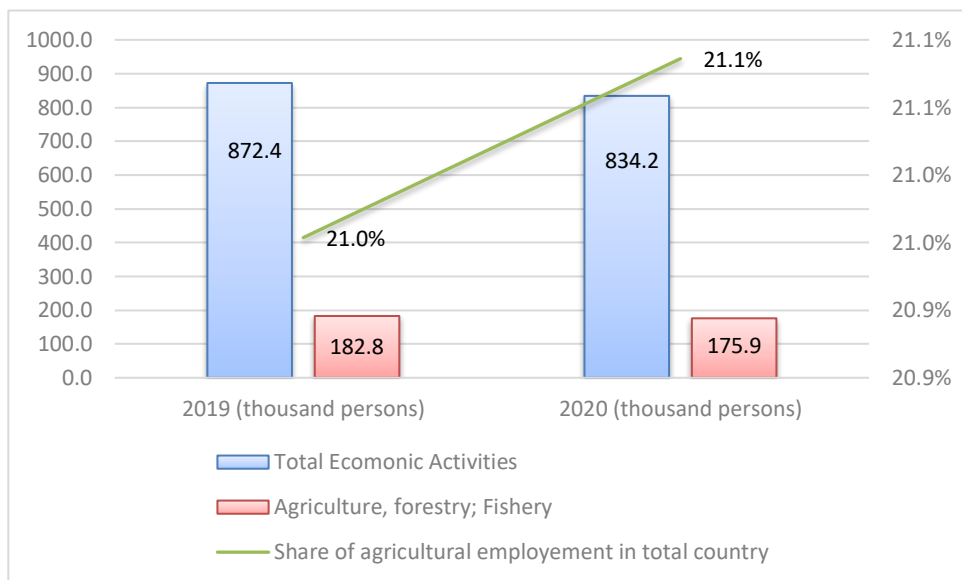
Source: National Bureau of Statistics

2.3. Employment

According to the National Bureau of Statistics, in 2020 the share of agricultural employment in total country employment represents 21.1% (175.9 thousand persons).²²

Compared to 2019, the number of agricultural employments, in 2020, has decrease from 182.8 thousand persons to 175.9 thousand persons, or by -3.8% (Figure 4)

Figure 4: Employment in Agricultural sector, 2019-2020



Source: National Bureau of Statistics

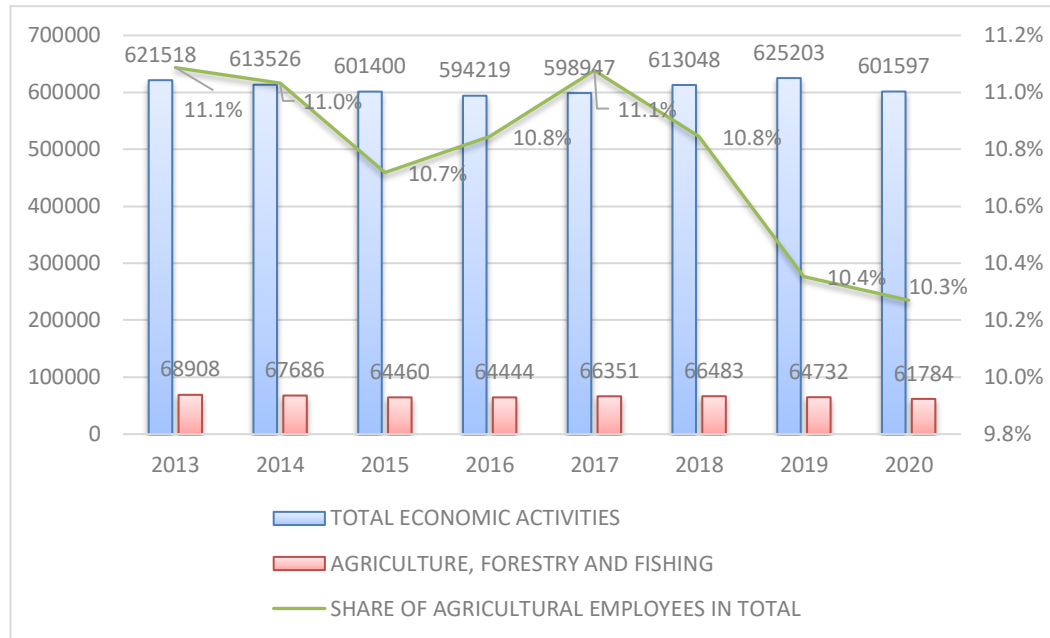
²¹ https://statbank.statistica.md/PxWeb/pweb/en/40%20Statistica%20economica/40%20Statistica%20economica_24%20ANT_ANT030/ANT030060.px/?rxid=9a62a0d7-86c4-45da-b7e4-fecc26003802

²² https://statbank.statistica.md/PxWeb/pweb/en/30%20Statistica%20sociala/30%20Statistica%20sociala_03%20FM_03%20MUN2019_MUN020/MUN120200.px/table/tableViewLayout1/?rxid=b2ff27d7-0b96-43c9-934b-42e1a2a9a774

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Meanwhile, also according to the National Bureau of Statistics, about 62 thousand people were employed in the agricultural sector in Republic of Moldova during 2020, representing 10.3% of total employees of the country. The share of employees in the agricultural sector in the total number of employees in the economy decreased from 11.1% in 2013 to 10.3% in 2020.²³ (Figure 5)

Figure 5: Employees in the Agricultural sector, 2013-2020



Source: National Bureau of Statistics

According to the latest data provided by Worldbank, the share of employment in agriculture in total employment in European Union, in 2019, represented about 4.4%.²⁴

²³https://statbank.statistica.md/PxWeb/pxweb/en/30%20Statistica%20sociala/30%20Statistica%20sociala_03%20FM_SAL020/SAL020100.px/table/table_ViewLayout1/?rxid=9a62a0d7-86c4-45da-b7e4-fecc26003802

²⁴<https://data.worldbank.org/indicator/SL.AGR.EMPL.ZS?locations=EU>

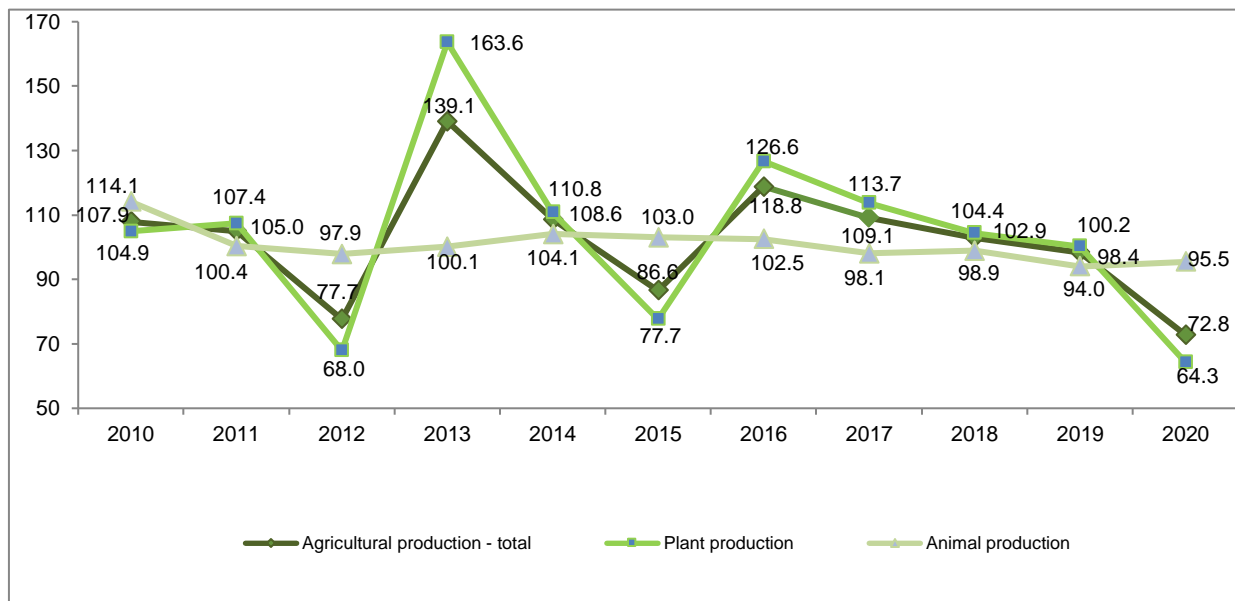
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2.4. Agricultural production in the Republic of Moldova

National Bureau of Statistics informs that, the global agricultural production, in all types of households (agricultural enterprises, farms and population households) in 2020, according to preliminary estimations, registered 72,9% compared to 2019.

The decrease of the global agricultural production (with 27,1%) was determined by the decrease of the vegetable production with 35,9% (which reduced the overall index of global agricultural production with 26,1%) and livestock production with 3,8% (-1,0%). (Figure 6)

Figure 6: Volume indices of agricultural production²⁵



Source: National Bureau of Statistics

Considerable decreases in the physical volume of agricultural production in 2020 compared to 2019 were recorded for the following crops: grain maize - by 63.4% (which generated a decrease in global agricultural production by 8.6%), sunflower - 39.9% (-4.7%), wheat - 50.5% (-4.3%), fruit, nuts and berries - 21.2% (-2.0%), grapes - 27.6% (-1.8%), vegetables - with 22.2% (-1.7).

In 2020, the share of vegetable production in total agricultural production was 64% (in 2019 - 73%), animal production returning 36% (in 2019 - 27%) (Table 4).

²⁵ https://statistica.gov.md/public/files/publicatii_electronice/Anuar_Statistic/2021/16_AS.pdf

Table 4. Production of the main agricultural products²⁶

	Production, thousand tons		Change, 2020/2019, %
	2019	2020	
Total agricultural production	x	x	72,9
Crop production, of which	x	x	64,1
Cereal grains and legumes - total	3550	1496	43,7
of which: wheat	1147	568	49,5
grain corn	2130	778	36,6
grain legumes	51	27	69,2
Sunflower	811	487	60,1
Sugar beet	607	424	69,8
Tobacco	0,5	0,4	94,2
Soy	64	31	47,6
Rape	77	47	60,8
Potatoes	177	171	96,7
Vegetables	307	225	77,8
Fruits, nuts and berries - total	846	648	78,8
Grapes	659	475	72,4
Animal production, of which	x	x	96,2
Cattle and poultry (live)	185	184	99,5
Milk	367	322	87,6
Eggs (millions of pieces)	687	641	94,3

Source: National Bureau of Statistics

In 2020, the Republic of Moldova produced:

- 568 thousand tons of wheat;
- 778 thousand tons of grain corn;
- 487 thousand tons of sunflower;
- 424 thousand tons of sugar beet;
- 475 thousand tons of grapes;
- 465 thousand tons of potato.



Apple orchard



Sunflower field

²⁶ <https://statistica.gov.md/newsview.php?l=ro&id=6897&idc=168>

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Irrigation infrastructure.²⁷

Centralized Irrigation Systems (CIS) were mostly built during the 70s - early 90s on an area of about 290 thousand ha, of the approximately 1 220 thousand ha suitable for irrigation (Source: Land Cadaster, 2020), of which 118 thousand ha were located on the left side of the Dniester and were used by state enterprises, but also by collective ones.

At present, the CIS machine has an advanced degree of wear, both physical and moral, and has lost its original technical characteristics. Institutional reforms in the 1990s, the privatization of land, hydrotechnical infrastructure, tertiary networks and irrigation equipment have led to a loss of integrity and complexity of hydro-improvement systems, a significant reduction in the volume of agricultural production harvested on irrigated land.

During this period, the equipment of the pumping stations was embezzled, dismantled and dismantled, the irrigation network was partially dismantled, the irrigation equipment was decommissioned. More detailed information regarding the SCI status is presented in table below.

Table 5. Current technical condition of centralized irrigation systems

	Total	Including		
		functional	difunctional	destroyed
Number of CIS	77	21	17	39
Served area, thousand ha	108,100	30,240	23,510	54,350

Source: Agency "Apele Moldovei".

The gradual deterioration of the CIS, the sudden increase in the price of electricity, the introduction of the tax for captured water have led to a decrease in irrigated areas. The information regarding the irrigation of agricultural lands in the last years is presented in table below.

Table 6. Dynamics of agricultural land irrigation within SCI

	1989	1990	1999	2005	2010	2012	2014	2016	2018	2019	2020
Area, thousand ha	244*	234*	4,1	15,5	18,7	3,9	2,7	3,5	3,8	3,7	7,2
Delivered water, mln m ³	432*	692*	4,0	10,8	9,8	3,9	2,5	4,2	4,0	2,4	9,9
Number of beneficiaries	-	-	-	322	586	138	78	64	76	76	84

* Including the left bank of the Dniester (since 1999 data for the left bank of the Dniester are not reported) Source: Agency "Apele Moldovei".

Agriculture has always been one of the leading sectors in the Moldovan economy, largely for natural reasons: the rich soil resources, biological diversity, good climate, and geographical conditions. There is also a tradition of hardworking farmers and, more recently, private entrepreneurs interested in investing in Moldova's agriculture. Agriculture has an important impact on the social and economic development of Moldova, since it meets the majority of the population's food requirements domestically and prevents the country from being dependent on international sources, while supplying raw materials of other sectors dependent on agriculture.

Key advantages of Moldovan agricultural sector:

²⁷ National Strategy for the Development of the Irrigation Sector 2030

- Encouraging investments through a subsidy fund, which is very competitive and covers the entire spectrum of agricultural activities.
- Moldova's location: access to EU and CIS markets (free trade regimes and geographical location);
- The fertile soil and favorable climate conditions: the main conditions required to develop intensive agriculture;
- High efficiency of a profitable agro-industrial sector;
- Large popularity of Moldovan brands on CIS markets: high quality of Moldovan products recognized in all former USSR regions;
- Ecologically pure products in Moldova: the products in Moldova have remarkable gustative quality provided at exclusively accessible prices. The production capacities of the agro-industrial complex are located at short distance from raw material location and are placed uniformly within the country territory;
- Extremely competitive labor force and availability of qualified staff;
- Possibility of setting up joint ventures and to develop the local market.

The trade policies promoted by the Republic of Moldova are mostly geared towards attracting investment in the national economy, which can stimulate innovation, transfer of know-how and production of competitive goods for domestic and foreign markets, creation of high added value and efficient technical and economic infrastructure, in order to maximize the existing economic potential. Due to its favorable geographical position, Republic of Moldova is an attractive location for international organizations and transnational corporations, and the country is becoming increasingly important as a place to conduct business between western and eastern markets:

1. Deep and Comprehensive Free Trade Area (DCFTA)
2. Commonwealth of Independent States (CIS)
3. Central European Free Trade Agreement (CEFTA).²⁸

²⁸ [https://invest.gov.md/attached_files/2021/03/04//02020_Food%20Processing%20&%20Livestock%20overview%20Brochure%20\(ENG\).pdf](https://invest.gov.md/attached_files/2021/03/04//02020_Food%20Processing%20&%20Livestock%20overview%20Brochure%20(ENG).pdf)

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2.5. Agricultural production in the Northern Development Region (NDR)

The Northern Development Region of Republic of Moldova is located in the South-Eastern part of Europe, bordering Romania to the West, Ukraine to the North and East. From an administrative-territorial point of view, NDR includes 3 municipalities (Balti, Edinet, Soroca) and 11 districts (Briceni, Edinet, Donduseni, Drochia, Falesti, Floresti, Glodeni, Ocnita, Riscani, Singerei, Soroca).

Total area of NDR has is about 10,014 km² (equivalent to about 1 001 394 thousand ha), representing 29.6% of the total area of the country.



With a population of almost **1 million residents**, the Region is the 2nd biggest development region in Moldova.

NDR's capital - **Bălți** (150 thousand resident population) is the economic, administrative and cultural center of the region, and the 3rd biggest city from Moldova.

Agricultural sector in the NDR plays an important role in the local economy, as 66.2% of the total area of the region is agricultural.

Table 7: Land fund in NDR, ha

	Total land area, ha	Agricole land, ha
Total Country	33846,38	20088,78
Total NDR	10014,52	6632,30
Share in total country	29,6%	33,0%

Source: National Bureau of Statistics

The region is the **undisputed Moldovan leader** in the agri-food industry production of oils & fats, sugar, dairy products, processed fruits & vegetables.

Balti is the undisputed Moldovan leader in the agri-food industry production of oils & fats.

Briceni is the district in NDR that has the highest fertility (74 points) in the national ranking, being the absolute leader in potatoes cultivation with 77% and soy growing with 46% in NDR, and 3rd place by field vegetables cultivation. Also, it is one of the NDR leader in the agri-food industry production of canned vegetable (3rd).

Dondușeni is one of the leading NDR district in sugar beet production and rape growing (2nd), also an important player in meat production, including poultry in NDR.

Drochia is one of the leading NDR district in tobacco (followed by **Sîngerei** district) and flour production.

Edineț district is the undisputed NDR leader in the agri-food industry production of juices and canned vegetables & fruits, hosting 2 major Moldovan processors. The soils in Edineț district have the highest fertility (74 points) in the national ranking, contributing to development of agri-business, leading the NDR by maize cultivation (1st), potatoes production (2nd), field vegetables and soy cultivation (3rd), etc.

Florești is one of the leading NDR districts in the agri-food industry production of meat production, including poultry (1st) and forage for animals (1st).

Râșcani district holds the 2nd position by milk production.

Soroca is the leading NDR district in the agri-food industry production of cheese and canned fruit and vegetable.

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An overview of main agricultural players in NDR is presented in the annex: The list of potential beneficiaries. The 16 selected companies have been identified among the exporting companies in the northern region, which have a website and are more visible in the online environment and beyond.

The main products in the NDR are presented in the following tables:

Table 8: Agri-food products, NDR, 2020²⁹

No	Agri-food products, unit base	Total Country	NDR	Share in total country, %
1	Flour, tons	108 874,9	42 838,5	39,3%
2	Milk and cream with fat content <6%, tons	56 535,8	35 997,1	63,7%
3	Bread and bakery foods, tons	123 112,6	19 770,2	16,1%
4	Fruits and vegetables juices, thou. litres	42 984,9	18 592,4	43,3%
5	Curdled milk, cream, yogurt and other fermented products, tons	27 826,8	18 431,8	66,2%
6	Canned vegetables and fruits, tons	18 951,4	14 553,6	76,8%
7	Meat, including chicken meat, tons	67 558,3	6 239,7	9,2%
8	Sausages, tons	22 313,3	3 958,2	17,7%
9	Fresh cheeses, tons	8 645,5	3 455,4	40,0%
10	Butter, tons	3 835,5	3 371,9	87,9%

Source: National Bureau of Statistics

NDR is the undisputed leader of the country in dairy production, holding **87.9%** of butter production, **66.2%** of Curdled milk, cream, yogurt and other fermented products, **63.7%** of the total country production of milk and **40%** of fresh cheese production. Also, NDR leads the country by processed fruits and vegetables, holding **76.8%** of Canned vegetables and fruits production of the country and **43.3%** of Fruits and vegetables juices production.

Table 9: Agricultural products, NDR, 2020 (National Bureau of Statistics)³⁰

No	Agricultural products, yearly harvest in tons	Total Country	NDR	Share in total country, %
1	Sugar beet	409 547,6	408 715,4	99,8%
2	Wheat - total (winter and spring)	468 224,7	242 693,9	51,8%
3	Sunflower	425 757,2	222 244,2	52,2%
4	Grain maize	259 751,9	175 868,4	67,7%
5	Barley - total (winter and spring)	92 685,5	41 575,0	44,9%
6	Field vegetables	62 448,3	28 325,4	45,4%
7	Corn for silage, green mass and hay	95 356,1	26 703,3	28,0%
8	Rape - total (winter and spring)	47 127,8	23 247,9	49,3%
9	Soy	20 954,9	20 842,2	99,5%
10	Potatoes	29 912,1	19 368,4	64,8%

Source: National Bureau of Statistics

NDR leads the country by crops and vegetables production with **99.8%** of the total sugar beet production of Republic of Moldova, **99.5%** of soy production, **67.7%** of grain maize, **64.8%** of total potatoes production in the country.

²⁹https://statbank.statistica.md/PxWeb/pxweb/en/60%20Statistica%20regionala/60%20Statistica%20regionala_14%20IND/IND030300reg.px/?rxid=5360837a-13b5-4912-a2e0-12892e96d2ab

³⁰https://statbank.statistica.md/PxWeb/pxweb/en/60%20Statistica%20regionala/60%20Statistica%20regionala_16%20AGR/AGRO20600reg.px/?rxid=5360837a-13b5-4912-a2e0-12892e96d2ab

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3. International trade of agricultural products in Republic of Moldova

3.1. International trade trends in Republic of Moldova

According to Trade statistics for international business development (Trademap.org), in 2020, Moldova's overall foreign trade in goods transactions (imports + exports) totaled 6.9 billion EUR.³¹

3.1.1. Exports

According to Trademap.org, the total exported value in 2020 was 2.2 billion EUR³², decreasing 12.3% compared to 2019 (2.5 billion EUR), due to the COVID-19 pandemic effects. The main share of export value belongs to Insulated wire, cable (16.9%), followed by Sunflower seeds (7.6%), Wine of fresh grapes (5.4%), Seats, whether or not convertible into beds (4.4%) and Sunflower-seed, safflower or cotton-seed oil (4.1%).

Top 5 increasing in export value in 2020:

1. Ferrous waste and scrap; remelting scrap ingots of iron or steel - increased 13x;
2. Undenatured ethyl alcohol of an alcoholic strength of $\geq 80\%$ (105.5%);
3. Sunflower-seed, safflower or cotton-seed oil (46.8%);
4. Apples, pears and quinces, fresh (42.5%);
5. Apricots, cherries, peaches incl. nectarines, plums (45.3%).

Top 5 decreasing in export value in 2020:

1. Wheat and meslin (-72.4%);
2. Medicaments for therapeutic or prophylactic uses (-43.3%);
3. Maize or corn (-37.7%);
4. Rape or colza seeds (-36.2%);
5. Insulated wire, cable (-20.7%).

Please see the **Annex 1** for the main export partners of Republic of Moldova.

In 2020, exports to the European Union amounted 1.4 billion EUR, about 66.7% of total exported value, indicating the EU's importance in Moldova's export trade, while exports to CIS (Commonwealth of Independent States) countries amounted to 350.2 million EUR, or 16.1% of the total. The most important export trading partners (EU-27) of the Republic of Moldova and they share in EU export value:

- Romania (42.6%);
- Germany (13.6%);
- Italy (12.9%);
- Poland (6.6%);
- Czech Republic (4.9%);
- Bulgaria (3.5%);
- Netherlands (3.3%);
- Spain (2.1%);
- France (1.8%);

³¹ trademap.org

³² https://www.trademap.org/Product_SelCountry_TS.aspx?nvpm=1%7c498%7c%7c%7cTOTAL%7c%7c%7c2%7c1%7c1%7c2%7c2%7c1%7c1%7c1%7c1%7c1

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- Hungary (1.6%).

While in CIS, the top Moldova's export trading partners (in 2020) and they share in CIS export value are:

- Russian Federation (54.2%);
- Ukraine (17.4%);
- Belarus (16.5%);
- Georgia (5.7%);
- Kazakhstan (3.5%).

3.1.2. Imports

In terms of imports, the overall value of imports in 2020 was 4.7 billion EUR³³, decreasing 9.1% compared to 2019 (5.2 billion EUR). The main share of import value belongs to Petroleum oils and oils obtained from bituminous minerals (6.4%), Medicaments for therapeutic or prophylactic uses (4.3%), Motor cars and other motor vehicles (3.1%) and Insulated wire, cable (2.5%).

Top 5 increasing in import value in 2020:

1. Unglazed ceramic flags and paving (438,3%);
2. Diagnostic or laboratory reagents (67.9%);
3. Maize or corn (54.7%);
4. Automatic data-processing machines and units (29.2%);
5. Sunflower seeds (15.0%).

Top 5 decreasing in import value in 2020:

1. Petroleum oils and oils obtained from bituminous minerals (-39.0%);
2. Copper wire (-43.4%);
3. Mineral or chemical fertilizers (-29.3%);
4. Tractors (-19.7%);
5. Petroleum gas and other gaseous hydrocarbons (-16.6%).

Please see the Annex 2 for the main import partners of Republic of Moldova.

The European Union plays an important role as an import trade partner of Republic of Moldova with a share of approximately 45.6%. while 24.4% came from CIS countries (1.2 billion EUR).

The main import countries (EU-27) and they share in EU import value, in 2020:

- Romania (25.6%);
- Germany (18.3%);
- Italy (14.1%);
- Poland (8.8%);
- France (4.9%);
- Hungary (4.1%);
- Czech Republic (3.9%);
- Spain (3.2%);
- Austria (2.5%);
- Bulgaria (2.5%).

³³https://www.trademap.org/Product_SelCountry_TS.aspx?nvpm=1%7c498%7c%7c%7cTOTAL%7c%7c%7c2%7c1%7c1%7c2%7c1%7c1%7c1%7c1%7c1

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While in CIS, the top Moldova's import trading partners (in 2020) and they share in CIS import value are:

- Russian Federation (45.6%);
- Ukraine (39.9%);
- Belarus (8.6%);
- Kazakhstan (4.4%).

3.1.3. Trade Balance

Regarding the trade balance of Republic of Moldova, the country shows a trade deficit in the years 2018 to 2021, meaning that Moldovan imports have a greater value than it exports. The table below shows and explains these trends.

Table 10: Moldovan Trade Balance 2018-2021

Million EUR								
Period	2018	2019	2020	Jan - Nov 2020 ³⁴	Jan - Nov 2021 ³⁵	Change, %		
						2019/2018	2020/2019	Jan - Nov 2021/2020
Imports ³⁶								
Total Imports	5.764	5.842	5.415	4.849	6.419	1,4%	-7,3%	32,4%
Exports ³⁷								
Total Exports	2.706	2.779	2.485	2.249	2.819	2,7%	-10,6%	25,4%
Trade Balance								
Total Trade Balance	-2.588	-2.736	-2.567	-2.600	-3.600	5,7%	-6,2%	38,5%

Source: National Bureau of Statistics

Please see the Annex 3 for the main trading partners of Republic of Moldova in terms of trade balance.

³⁴ National Bureau of Statistics of Moldova

³⁵ National Bureau of Statistics of Moldova

³⁶ https://www.trademap.org/Product_SelCountry_TS.aspx?nvpm=1%7c498%7c%7c%7cTOTAL%7c%7c%7c2%7c1%7c1%7c1%7c2%7c1%7c1%7c1%7c1%7c1

³⁷ https://www.trademap.org/Product_SelCountry_TS.aspx?nvpm=1%7c498%7c%7c%7cTOTAL%7c%7c%7c2%7c1%7c1%7c2%7c2%7c1%7c1%7c1%7c1%7c1

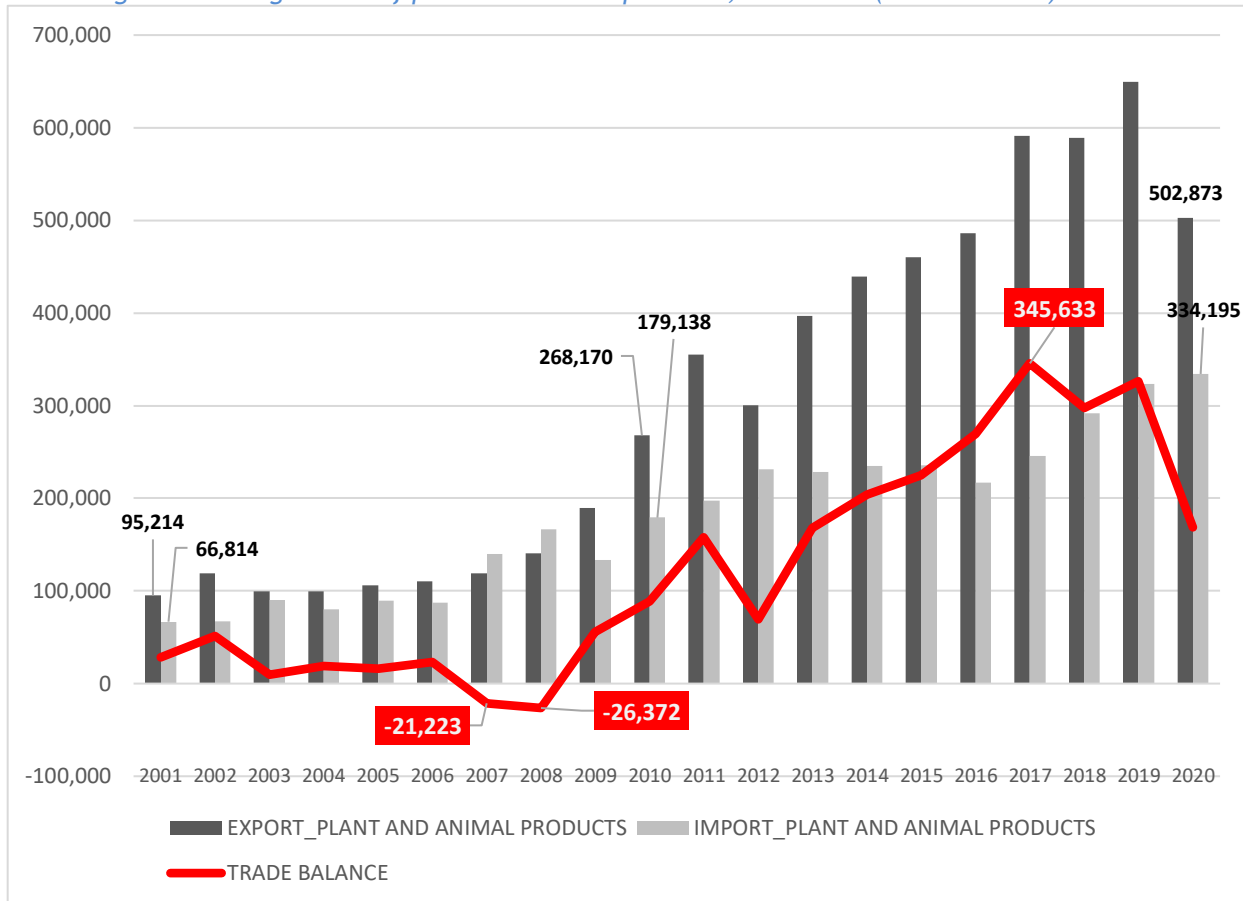
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3.2. International trade of agricultural products in Republic of Moldova

Agricultural trade is the backbone of sustained social and economic development in many emerging and transition economies, as in Republic of Moldova. The total value of Moldova’s exports of agricultural products (plant and animal production) amounted to 502.9 million EUR in 2020 (Figure 7). The general trend of the export value of agricultural products, after 2001 is slightly upward, contributing to the creation and maintenance of a positive trade balance, as in recent years exports have systematically exceeded imports.

Figure 7: Foreign trade of plant and animal products, 2001-2020 (thousand EUR)



Source: INTRACEN.ORG

On the other hand, Moldovan processed food and agro-based products foreign trade is consistently positive, the relative deficit has increased in the last 4 years, since 2017. The value of agri-food exports has been steadily rising, reaching 405.1 million EUR in 2020. Also, processed food and agro-based products imports have increasing in the last 6 years (Figure 8).

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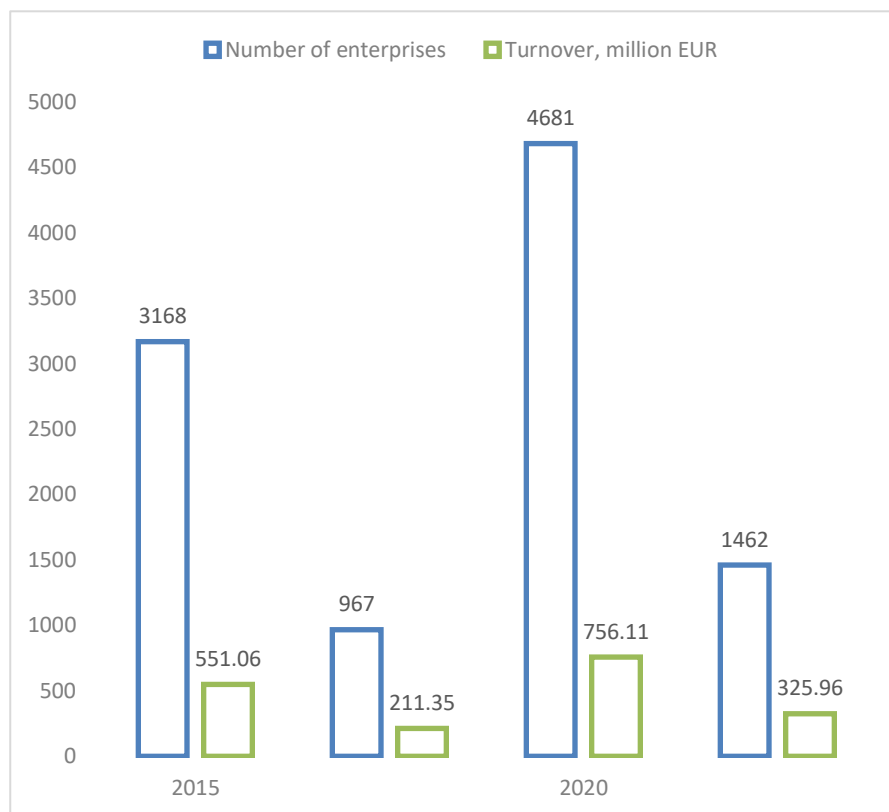
3.3. Bilateral trade of Republic of Moldova with other BRIDGES project countries

This chapter presents the bilateral trade trends between Republic of Moldova and the BRIDGES project countries: Romania, Armenia, Greece and Turkey.

3.3.1. Trade in Northern Development Region

In NDR, in 2020 the number of enterprises activating in Agricultural sector (including forestry and fishing) amounted 1 462, representing 31.2% of total agricultural entities of the country, with a total number of 14 721 employees (36.4% of total employees of agricultural sector of Republic of Moldova) and a revenue of 326 million EUR (43.2% of total income of agricultural sector of the country) (figure 9).⁴²

Figure 9: Economic activity of agricultural entities in NDR



Source: National Bureau of Statistics

Compared to 2015 year, the number of agricultural enterprises in NDR has increased by 51.2%, while the number of employees is decreasing by 15.3%. Regarding the revenue of agricultural entities in the last 5 years has increased by 51.7%.

In terms of international trade of entities, NDR holds 202 companies (10.6% of total exporting companies in the country) with a total exporting value amounting 401.8 million EUR, representing 27.6% of total exported value of Republic of Moldova (Table 11).

⁴²https://statbank.statistica.md/PxWeb/pxweb/en/40%20Statistica%20economica/40%20Statistica%20economica_24%20ANT_A_NTO30/ANT030060.px/table/tableViewLayout1/?rxid=9a62a0d7-86c4-45da-b7e4-fecc26003802

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Table 11: Economic activity of exporting companies in NDR compared to whole country

	No of companies	Number of companies, share in total country (%)	Total export turnover (million EUR)	Turnover, share in total country (%)	No of employees
Whole Country	1 908	100	1 454,1	100	140 032
Mun. Chişinău	1 234	65	610,0	41,9	94 151
North Region	202	10,6	401,8	27,6	21 709
Center Region	317	16,6	315,2	21,7	14 410
South Region	93	4,9	65,7	4,5	5 931
UTA Găgăuzia	62	3,2	61,5	4,2	3 831

Source: National Bureau of Statistics

Detailing of the economic activity in term of international trade (export) of NDR by territorial structures (districts) is presented in the table below.

Table 12: Economic activity of exporting companies in NDR by districts

District	Total export value (M EUR)	Share in total exported value in NDR (%)	No of companies	Share in total exporting companies in NDR (%)	No of employees
Mun. Bălţi	257,5	64,1	70	34,7	13 802
Edineţ	76,0	18,9	19	9,4	807
Soroca	21,3	5,3	23	11,4	2 177
Faleşti	16,1	4,0	12	5,9	1 951
Donduşeni	9,1	2,3	12	5,9	214
Drochia	8,1	2,0	7	3,5	446
Briceni	6,4	1,6	18	8,9	631
Floreşti	3,7	0,9	12	5,9	734
Sângerei	1,3	0,3	16	7,9	268
Ocniţa	0,8	0,2	5	2,5	259
Râşcani	0,8	0,2	4	2,0	116
Glodeni	0,7	0,2	4	2,0	304
TOTAL NDR	401,8	100	202	100	21 709

Source: National Bureau of Statistics

The undisputed leader of the region in terms of export is **municipality Bălţi**, holding 64.7% of total exported value of NDR and 34.7% of total exporting companies in the Northern region.

Bălţi is followed by Edineţ and Soroca districts, with 18.9% and, respectively 5.3% of total exported value in NDR.

An overview of main agricultural players in NDR is presented in the annex: The list of potential beneficiaries. The 16 selected companies have been identified among the exporting companies in the northern region, which have a website and are more visible in the online environment and beyond.

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3.3.2. Moldova-Romania bilateral trade

Romania is the main trading partner of Republic of Moldova, as the volume of bilateral trade amounted to 1.2 billion EUR in 2020 (decrease compared to 2019 by 18.3%), with exports amounting to 619 million EUR (decrease compared to 2019 by 9.4%) and imports amounting to 553 million euros (decrease compared to 2019 by 26.4%). Regarding the total bilateral tradebalance of Republic of Moldova - Romania in the last five years, it presented in the following table.

Table 13: Republic of Moldova - Romania bilateral trade balance

	2016 (thousand EUR)	2017 (thousand Eur)	2018 (thousand EUR)	2019 (thousand EUR)	2020 (thousand EUR)	Change 2020/2019, %
Exports	463,560	531.666	670.891	683.714	619.168	-9,4%
Imports	498,314	614.792	709.786	751.399	553.369	-26,4%
Trade Volume	961,874	1.146.458	1.380.677	1.435.113	1.172.537	-18,3%
Trade Balance	-34,754	-83.126	-38.895	-67.685	65.799	-197,2%

Source: INTRACEN.ORG

Moldova's exports to Romania⁴³

Republic of Moldova export of goods have been steadily increasing over the past five years as in 2016 the exported value amounted 464 million EUR, in 2017 - 531.7 million EUR, in 2018 at 670.9 million EUR, in 2019 at 683.7 million EUR and in 2020 decreased to 620 million EUR.

Please see the **Annex 5** for the main exported products by Republic of Moldova to Romania:

Out of 20 main exported products, 11 registered an increase of the exported value, while 5 articles have and export decrease.

The most significant increase is recorded by: Sunflower-seed, safflower or cotton-seed oil (+82.3%), Fruits, nuts and other edible parts of plants, prepared or preserved (+72.4%), Electrical transformers, static converters (+40.4%), Parts and accessories for tractors, motor vehicles (+35.1%) and Wine of fresh grapes (+31.6%).

The most significant decrease is recorded by: Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers (-50.2%), Parts of footwear (-29.9%), Rape or colza seeds (-25.2%), Insulated "incl. enameled or anodized" wire, cable (-24.5%) and Packing cases, boxes, crates, drums (-23.8%).

Moldovan exports of agri-food products to Romania⁴⁴

The total exports of agri-food products to Romania in 2020 amounted to a value of 170.1 million EUR, marking an increase of 5.7% compared to 2019 (160.9 million EUR). It is also noted that the total value of agri-food exports represents about 27.5% of the total Moldovan export value to Romania.

⁴³https://www.trademap.org/Bilateral_TS.aspx?nvpm=1%7c498%7c%7c642%7c%7c%7c107698%7c%7c6%7c1%7c1%7c2%7c2%7c1%7c1%7c1%7c1%7c1

⁴⁴ *Ibidem*

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Please see the **Annex 6** for the top 20 exported agri-food products in Romania.

The most important export increases 2020/2019: Other vegetables prepared or preserved otherwise than by vinegar or acetic acid (+225.2%), Sunflower-seed, safflower or cotton-seed oil (+82.3%), Other nuts, fresh or dried (+80.5%), Undenatured ethyl alcohol (+72.8%), Fruits, nuts and other edible parts of plants (+72.4%), Wine of fresh grapes (+31.6%) and Cane or beet sugar (+24.3%).

Moldova's imports from Romania⁴⁵

Republic of Moldova import of goods, from Romania, have been steadily increasing over the past five years as in 2016 the imported value amounted 500 million EUR, in 2017 - 615 million EUR, in 2018 at 710 million EUR, in 2019 at 751 million EUR and in 2020 decreased to 553 million EUR (-26.4% compared to 2019).

Please see the **Annex 7** for the main imported products by Republic of Moldova from Romania in 2020.

Out of 20 main imported products, 11 have registered an increase of imported value, 9 registered a decrease.

The most significant increase was recorded by Maize or corn (+40.2%) while the most significant decrease is recorded in the products: Petroleum oils and oils obtained from bituminous minerals (-46.5%)

Moldova's imports of Agri-food products from Romania⁴⁶

The total imports of agri-food products from Romania in 2020 they amounted to a value of 64.7 million Euros, recording an increase of 33.6% compared to 2019 (where they had reached a value of 48.4 million Euros). It is also noted that the total value of imports of agri-food products represents approximately 11.7% of the total value of Moldovan imports from Romania.

Please see the **Annex 8** for the main imported agri-food products by Republic of Moldova from Romania in 2020.

Out of 20 products, 14 have registered an increase of imported value, compared to 2019, main ones being Potatoes, fresh or chilled (+206.0%), Cucumbers and gherkins, fresh or chilled (+129.0%), Fish fillets and other fish meat, fresh, chilled or frozen (+117.2%), while 6 products registered a decrease, main ones: Meat and edible offal of fowls of the species Gallus domesticus, ducks, geese, turkeys (-27.0%).

⁴⁵https://www.trademap.org/Bilateral_TS.aspx?nvpm=1%7c498%7c%7c642%7c%7c%7c107698%7c%7c6%7c1%7c1%7c1%7c2%7c1%7c1%7c1%7c1%7c1%7c1%7c1

⁴⁶ *Ibidem*

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3.3.3. Republic of Moldova - Armenia bilateral trade

The volume of bilateral trade between Republic of Moldova and Armenia amounted, in 2020, to 2.0 billion euros (in decrease compared to 2019 by 52.8%), with exports amounting to 1.1 billion euros (in decrease compared to 2019 by 64.5%) and imports amounting to 841 million euros (decreasing compared to 2019 by 15.9%). Regarding the total bilateral trade balance of Republic of Moldova - Armenia in the last five years, it presented in the following table.

Table 14: Republic of Moldova - Armenia trade balance (INTRACEN.ORG)

	2016	2017	2018	2019	2020	Change 2020/2019, %
Exports	817	1.106	1.970	3.176	1.128	-64,5%
Imports	302	574	1.066	1.000	841	-15,9%
Trade Volume	1.119	1.680	3.036	4.176	1.969	-52,8%
Trade Balance	515	532	904	2.176	287	-86,8%

Source: INTRACEN.ORG

Moldova's exports to Armenia⁴⁷

Republic of Moldova export of goods have been steadily increasing over the past five years as in 2016 the exported value amounted 817 thousand EUR, in 2017 - 1.1 million Euros, in 2018 at 2 million Euros, in 2019 at 3.1 million Euros and in 2020 decreased to 1.1 million Euros.

Please see the **Annex 9** for the main exported products by Republic of Moldova to Armenia in 2020.

Out of 14 main exported products, 5 registered a significant increase of the exported value, compared to 2019, while 7 articles have and export decrease. Still, there are products that have been exported for the first time to Armenia, such as: Machinery, plant or laboratory equipment and Centrifuges, incl. centrifugal dryers.

The most significant increase is recorded by: Wine of fresh grapes (+1350%), Carboys, bottles, flasks, jars, pots, phials, ampoules (+246,9%), Other vegetables prepared or preserved otherwise than by vinegar or acetic acid (+160,0%) and Brooms, brushes, incl. brushes constituting parts of machines (+140,0%).

The most significant decrease is recorded by: Undenatured ethyl alcohol (-98.2%), Dishwashing machines; machinery for cleaning or drying bottles (-92,8%), Seats, whether or not convertible into beds (-59,3%) and Medicaments for therapeutic or prophylactic uses (-37,4%).

Moldova's imports from Armenia⁴⁸

Republic of Moldova import of goods, from Armenia, have been increasing over the past five years as in 2016 the imported value amounted 302 thousand Euros, in 2017 - 574 thousand Euros, in 2018 at 1.1 million Euros, in 2019 at 1 million Euros and in 2020 decreased to 841 thousand Euros (-15.9% compared to 2019).

The main imported products by Republic of Moldova from Armenia in 2020:

⁴⁷https://www.trademap.org/Bilateral_TS.aspx?nvpm=1%7c498%7c%7c051%7c%7c%7c107698%7c%7c6%7c1%7c1%7c2%7c2%7c1%7c1%7c1%7c1%7c1

⁴⁸https://www.trademap.org/Bilateral_TS.aspx?nvpm=1%7c498%7c%7c051%7c%7c%7c107698%7c%7c6%7c1%7c1%7c1%7c1%7c2%7c1%7c1%7c1%7c1%7c1

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Table 15: Main products imported from Armenia

No.	CN4	PRODUCT	2019 (thousand EUR)	2020 (thousand EUR)	Change 2020/2019, %
1	'3004	Medicaments for therapeutic or prophylactic uses	688	656	-4,7%
2	'1806	Chocolate and other food preparations containing cocoa	140	110	-21,4%
3	'2208	Undenatured ethyl alcohol of an alcoholic strength of < 80%	22	29	31,8%
4	'8470	Calculating machines	0	18	-
5	'7010	Carboys, bottles, flasks, jars, pots, phials, ampoules	74	13	-82,4%

Source: INTRACEN.ORG

Out of 5 main imported products, in 2020, 1 have registered an increase of imported value, 3 registered a decrease, compared to 2019 and 1 have been imported for the first time: calculating machines.

The most significant increase was recorded by Undenatured ethyl alcohol (+31,8%) while the most significant decrease is recorded in the products: carboys, bottles, flasks, jars, pots, phials, ampoules (-82,4%).

3.3.4. Republic of Moldova - Greece bilateral trade

The volume of bilateral trade between Republic of Moldova and Greece amounted to 45.6 million EUR in 2020 (in decrease compared to 2019 by 16.9%), with exports amounting to 23.7 million EUR (in decrease compared to 2019 by 32.5%) and imports amounting to 22 million euros (increasing compared to 2019 by 10.6%). Regarding the total bilateral trade balance of Republic of Moldova - Greece in the last five years, it presented in the following table.

Table 16: Trade balance of Republic of Moldova - Greece

	2016	2017	2018	2019	2020	Change 2020/2019, %
Exports	26.650	26.106	31.704	35.084	23.691	%
Imports	17.659	22.607	20.427	19.852	21.954	10,6%
Trade Volume	44.309	48.713	52.131	54.936	45.645	-16,9%
Trade Balance	8.991	3.499	11.277	15.232	1.737	-88,6%

Source: INTRACEN.ORG

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Moldova's exports to Greece⁴⁹

Republic of Moldova export of goods to Greece have been increasing over the past five years as in 2016 the exported value amounted 26.6 million EUR, in 2017 - 26.1 million EUR, in 2018 at 31.7 million EUR, in 2019 at 35.1 million EUR and in 2020 decreased to 29.7 million EUR.

Please see the Annex 10 for the main exported products by Republic of Moldova to Greece, in 2020.

Out of 20 main exported products, 7 registered an increase of the exported value, while 10 articles have and export decrease. In 2020, 3 positions have been exported for the first time, by Republic of Moldova to Greece, such as: Molasses resulting from the extraction or refining of sugar (110 thousand EUR), Synthetic filament yarn (33 thousand EUR) and Carpets and other textile floor coverings, woven (12 thousand EUR).

The most significant increase is recorded by: Wheat or meslin flour (+120,0%), Undenatured ethyl alcohol of an alcoholic strength of ≥ 80 (+81,5%), Articles for the conveyance or packaging of goods, of plastics (+42,8%) and Cartons, boxes, cases, bags and other packing containers (+36,8%).

The most significant decrease is recorded by: Sunflower seeds (-92,9%), Unmanufactured tobacco; tobacco refuse (-67,9%), Glass fibers, incl. glass wool (-65.2%), Barley (-47,8%), Other nuts, fresh or dried (excluding coconuts, Brazil nuts) (-47.1%) and Wheat and meslin (-46.3%).

Moldova's imports from Greece⁵⁰

Republic of Moldova import of goods, from Greece, have been increasing/decreasing over the past five years as in 2016 the imported value amounted 17.7 million EUR, in 2017 - 22.6 million EUR, in 2018 at 20.4 million EUR, in 2019 at 19.9 million EUR and in 2020 increased to 21.9 million EUR (+10.6% compared to 2019).

Please see the Annex 11 for the main imported products by Republic of Moldova from Greece

Out of 20 main imported products, in 2020, 12 have registered an increase of imported value, 7 registered a decrease, compared to 2019 and 1 remained at the same value: Citrus fruit, fresh or dried.

The most significant increase was recorded by Melons, incl. watermelons, and papaws (papayas), fresh. Pasta (+505,6%), Prefabricated buildings (+393,8%) and Aluminium foil (+197,8%), while the most significant decrease is recorded in the products: Cigars, cheroots, cigarillos and cigarettes of tobacco (-35,0%), Medicaments for therapeutic or prophylactic uses (-24,5%) and Lifting, handling, loading or unloading machinery (-24,2%).

Moldovan exports of agri-food products to Greece

The total exports of agri-food products to Greece in 2020 amounted to a value of 20.3 million EUR, marking a decrease by 31.1% compared to 2019 (29.5 million EUR). It is also noted that the total value of agri-food exports represents about 85.6% of the total Moldovan export value to Greece.

Please see the Annex 12 for the main the exported agri-food products in Greece:

⁴⁹https://www.trademap.org/Bilateral_TS.aspx?nvpm=1%7c498%7c%7c300%7c%7cTOTAL%7c%7c%7c2%7c1%7c1%7c2%7c2%7c1%7c1%7c1%7c1%7c1

⁵⁰https://www.trademap.org/Bilateral_TS.aspx?nvpm=1%7c498%7c%7c300%7c%7cTOTAL%7c%7c%7c2%7c1%7c1%7c1%7c2%7c2%7c1%7c1%7c1%7c1%7c1

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Moldova's imports of Agri-food products from Greece

The total imports of agri-food products from Romania in 2020 they amounted to a value of 8.1 million EUR, recording an increase of 10.5% compared to 2019 (where they had reached a value of 7.4 million EUR). It is also noted that the total value of imports of agri-food products represents approximately 37.3% of the total value of Moldovan imports from Greece.

Please see the **Annex 13** for the main imported agri-food products from Greece

3.3.5. Republic of Moldova - Turkey bilateral trade

The bilateral trade between Republic of Moldova and Turkey amounted a trade volume 490.5 million EUR in 2020 (in decrease compared to 2019 by 4.67%), with exports amounting to 150.3 million euros (in decrease compared to 2019 by 4.06%) and imports amounting to 340.1 million euros (decreasing compared to 2019 by 4.94%). Regarding the total bilateral tradebalance of Republic of Moldova - Turkey in the last five years, it presented in the following table.

Table 17: Trade balance of Republic of Moldova - Turkey

	2016 (thousand EUR)	2017 (thousand EUR)	2018 (thousand EUR)	2019 (thousand EUR)	2020 (thousand EUR)	Change 2020/2019, %
Exports	55.546	92.116	90.771	156.805	150.439	%
Imports	245.757	269.397	287.892	357.794	340.111	-4,94%
Trade Volume	301.303	361.513	378.663	514.599	490.550	-4,67%
Trade Balance	-190.211	-177.281	-197.121	-200.989	-189.672	-5,63%

Source: INTRACEN.ORG

Moldova's exports to Turkey⁵¹

Republic of Moldova export of goods to Turkey have been increasing over the past five years as in 2016 the exported value amounted 55.5 million EUR, in 2017 - 92.1 million Euros, in 2018 at 90.7 million Euros, in 2019 at 156.8 million Euros and in 2020 decreased to 150.4 million Euros.

Please see the **Annex 14** for the main exported products by Republic of Moldova to Turkey

Out of 20 main exported products, 9 registered an increase of the exported value, while 9 articles have and export decrease. In 2020, 2 positions have been exported for the first time, by Republic of Moldova to Greece, such as: Sunflower-seed, safflower or cotton-seed oil and Ferrous waste and scrap.

The most significant increase is recorded by: Central heating boilers, non-electric (+361,7%), Undenatured ethyl alcohol of an alcoholic strength of ≥ 80 (+153.2%), Waste and scrap, of aluminium (+83,8%), Jerseys, pullovers, cardigans, waistcoats and similar articles, knitted or crocheted (+83,2%) and Wine of fresh grapes (+73,6%).

⁵¹https://www.trademap.org/Bilateral_TS.aspx?nvpm=1%7c498%7c%7c792%7c%7cTOTAL%7c%7c%7c2%7c1%7c1%7c2%7c2%7c1%7c1%7c1%7c1

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Table 18: Trade between Republic of Moldova and other BRIDGES project countries (ROMANIA, ARMENIA, GREECE and TURKEY), 2020

	ROMANIA	ARMENIA	GREECE	TURKEY
Exports (thousand EUR)	619.168	1.128	23.691	150.439
Imports (thousand EUR)	553.369	841	21.954	340.111
Trade Volume (thousand EUR)	1.172.537	1.969	45.645	490.550
Trade Balance (thousand EUR)	65.799	287	1.737	-189.672

Source: INTRACEN.ORG

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4. SWOT Analysis

The main goal of the SWOT analysis is to assess the agricultural and trade sectors' strengths (characteristics that give the agricultural and trade sector an advantage over others), weaknesses (factors that put the agricultural and trade sectors at a disadvantage in comparison to others), opportunities (aspects that the agricultural and trade sectors can take advantage of), and threats (factors that could impact negatively on the agricultural and trade sectors) from a local/regional/national/interregional perspective.

Strengths	Weaknesses
<ul style="list-style-type: none"> • Strategic geographical position of Republic of Moldova • 75% of the total land area is arable, the highest in Europe, where over 75% of agricultural holdings are in private property • Production of high value crops, especially fruits and vegetables, is profitable and presents an important potential for increasing revenues • Free Trade Agreements signed with 43 countries, including: DCFTA, FTA⁵⁵ with CIS, FTA with Turkey, CEFTA, GUAM • Moldova' is a well-known brand, especially in CIS countries, especially for wines and spirits and fresh produces; • Existence of a significant number of quality agricultural products, such as fruits, vegetables, grains, and livestock. • Appropriate climatic and land conditions, as well as abundant and diversified biological resources, which constitute the foundation for healthy and profitable farming. • Well-established institutional support infrastructure (Investment Agency, Sectorial Associations, Chamber of Commerce, Donors) 	<ul style="list-style-type: none"> • Small and fragmented agricultural holdings • High costs on the establishment and agricultural production • Lack of understanding about specific market needs • Lack of interest among young people to work in agriculture • No access to EU markets for animal and animal products (poultry and fish), except for honey • Weak legislative and institutional framework, which is not yet fully adapted to EU law • Production with limited added value, dependence on exports of raw materials to foreign markets • Insufficient storage infrastructure for small owners and small intermediaries⁵⁶ • Low level of foreign direct investments in the agri-food sector • Lack of innovative and advanced technologies designed and implemented in agricultural branch

⁵⁵ Free trade agreement

⁵⁶ https://unctad.org/system/files/official-document/Moldova-NGER-Report-Edited-05-07-2018_translated_Conft_checked_RO.pdf

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Opportunities	Threats
<ul style="list-style-type: none"> • Proximity to developed countries and the EU can allow a rapid transfer of technology that will increase sector productivity; • Improving food quality and safety to meet growing global quality standards • Increasing market quality standards and competition from other countries • Linkages and networking with education system and innovation centre • Growing international demand on agri-food products • Expansion into new geographic markets • The development of a new supporting policy the National Agriculture and Rural Development Strategy for 2022-2027 with clear objective to define new potential markets and increase the export potential of the agri-food sector. As well as the intention of the Government to design separate tailored Programs for each sub-sector requirements. 	<ul style="list-style-type: none"> • Negative impact of COVID-19 pandemic on Moldova's economy • Negative impacts of climate change (fires, floods, extreme weather conditions, etc.) • Depopulation and migration trends resulting in significant rural depopulation • Geopolitical issues • Disruptions in the agri-food value chain do to the global pandemic. • Intense competition in the food and processing global market

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5. Conclusions

Although Republic of Moldova is not an EU member state, it has DCFTA that allows to adjust the domains to EU standards, but especially the fact that the EU has become the No. 1 trading partner of the Republic of Moldova, which gives access to a market with high purchasing power and consumer culture.

National strategies and policies on agricultural and rural development are constantly updated to respond to the developing global situation. Moreover, the general objectives that define the priorities of the agricultural sector are aligned with the objectives of the Common Agricultural Policy of the European Union. While consolidating the achievements so far, Republic of Moldova is fully committed to setting agricultural sector onto a sustainable growth path and enhancing the preservation of agricultural biodiversity.

Agriculture is one of the key sectors that supports Moldova's sustainable development by providing jobs, especially for the rural population, being as well an essential source of input for the Moldovan Food industry and exports. Compared to other European countries, Republic of Moldova has a greater share of population in rural communities/areas, where agriculture is one of the main income sources, playing an important role both economic and social, with direct impact on the welfare of the population. Therefore, success in achieving the objectives of the 2030 Agenda depends on the implementation of the SDG (Sustainable Development Goals) on agriculture.

For strengthening the policy framework for the agri-food sector, The Minister of Agriculture and Food Industry of Moldova has prioritized a wide action plan for 2022 agenda to develop and to promote a series of strategic policy documents, examined in several meetings with relevant associations in order to update and to shape the framework around specific sector needs and capabilities:

- 1) National Strategy for Agricultural and Rural Development 2022-2027;
- 2) Development program of the wine sector of the Republic of Moldova 2030;
- 3) Milk production sector development program;
- 4) National program for the development of the milk production sector;
- 5) National program for the development of the meat production sector;
- 6) National program for the development of the aquaculture sector;
- 7) National program for the development of the sheep and goat sector;
- 8) The program regarding the development of the hydro-improvement sector;
- 9) Law on organic agri-food production and labeling of organic products.

Key advantages of Moldovan agricultural sector:

- Encouraging investments through a subsidy fund, which is very competitive and covers the entire spectrum of agricultural activities.
- Moldova's location: access to EU and CIS markets (free trade regimes and geographical location);
- The fertile soil and favorable climate conditions: the main conditions required to develop intensive agriculture;
- High efficiency of a profitable agro-industrial sector;
- Large popularity of Moldovan brands on CIS markets: high quality of Moldovan products recognized in all former USSR regions;
- Ecologically pure products in Moldova: the products in Moldova have remarkable gustative quality provided at exclusively accessible prices. The production capacities of the agro-industrial complex are located at short distance from raw material location and are placed uniformly within the country territory;
- Extremely competitive labor force and availability of qualified staff;
- Possibility of setting up joint ventures and to develop the local market.

The trade policies promoted by the Republic of Moldova are mostly geared towards attracting investment in the national economy, which can stimulate innovation, transfer of know-how and production of competitive goods for domestic and foreign markets, creation of high added value and efficient technical and economic infrastructure, in order to maximize the existing economic potential. Due to its favorable geographical position, Republic of Moldova is an attractive location for international organizations and trans-

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national corporations, and the country is becoming increasingly important as a place to conduct business between western and eastern markets:

1. Deep and Comprehensive Free Trade Area (DCFTA)
2. Commonwealth of Independent States (CIS)
3. Central European Free Trade Agreement (CEFTA).

Agricultural sector in the Northern Development Region (NDR) plays an important role in the local economy, as 66.2% of the total area of the region is agricultural.

The region is the **undisputed Moldovan leader** in the agri-food industry production of oils & fats, sugar, dairy products, processed fruits & vegetables. Also, **NDR** is the **leader** of the country in dairy production, holding **87.9%** of butter production, **66.2%** of Curdled milk, cream, yogurt and other fermented products, **63.7%** of the total country production of milk and **40%** of fresh cheese production. NDR leads the country by processed fruits and vegetables, holding **76.8%** of Canned vegetables and fruits production of the country and **43.3%** of Fruits and vegetables juices production.

In NDR, in 2020 the number of enterprises activating in Agricultural sector (including forestry and fishing) amounted 1 462, representing 31.2% of total agricultural entities of the country, with a total number of 14 721 employees (36.4% of total employees of agricultural sector of Republic of Moldova) and a revenue of 326 million EUR (43.2% of total income of agricultural sector of the country).

According to the National Bureau of Statistics, the total exported value in 2020 was 2.2 billion EUR, decreasing 12.3% compared to 2019 (2.5 billion EUR), due to the COVID-19 pandemic effects.

In 2020, exports to the European Union amounted 1.4 billion EUR, about 66.7% of total exported value, indicating the EU's importance in Moldova's export trade, while exports to CIS (Commonwealth of Independent States) countries amounted to 350.2 million EUR, or 16.1% of the total.

In terms of imports, the overall value of imports in 2020 was 4.7 billion EUR, decreasing 9.1% compared to 2019 (5.2 billion EUR). The European Union plays an important role as an import trade partner of Republic of Moldova with a share of approximately 45.6%. while 24.4% came from CIS countries (1.2 billion EUR).

Agricultural trade is the backbone of sustained social and economic development in many emerging and transition economies, as in Republic of Moldova. The total value of Moldova's exports of agricultural products (plant and animal production) amounted to 502.9 million EUR in 2020.

Romania is the main trading partner of Republic of Moldova, as the volume of bilateral trade amounted to 1.2 billion EUR in 2020 (decrease compared to 2019 by 18.3%), with exports amounting to 619 million EUR (decrease compared to 2019 by 9.4%) and imports amounting to 553 million euros (decrease compared to 2019 by 26.4%).

The volume of bilateral trade between Republic of Moldova and Armenia amounted, in 2020, to 2.0 billion euros (in decrease compared to 2019 by 52.8%), with exports amounting to 1.1 billion euros (in decrease compared to 2019 by 64.5%) and imports amounting to 841 million euros (decreasing compared to 2019 by 15.9%).

Regarding the bilateral trade between Republic of Moldova and Greece, the trade volume amounted to 45.6 million EUR in 2020 (in decrease compared to 2019 by 16.9%), with exports amounting to 23.7 million EUR (in decrease compared to 2019 by 32.5%) and imports amounting to 22 million euros (increasing compared to 2019 by 10.6%).

The bilateral trade between Republic of Moldova and Turkey amounted a trade volume 490.5 million EUR in 2020 (in decrease compared to 2019 by 4.67%), with exports amounting to 150.3 million euros (in decrease

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compared to 2019 by 4.06%) and imports amounting to 340.1 million euros (decreasing compared to 2019 by 4.94%).

Summarizing the trade partnerships between the participating countries, we can conclude the following regarding the relationship of Republic of Moldova with the BRIDGES project countries:

- The main trade partner of Republic of Moldova, regarding Export, Import and Trade Volume is ROMANIA, followed by TURKEY.
- A negative trade balance we can notice only with TURKEY (-189.7 thousand EUR).

National strategies and policies on agricultural and rural development are constantly updated to respond to the developing global situation. Moreover, the general objectives that define the priorities of the agricultural sector are aligned with the objectives of the Common Agricultural Policy of the European Union.

While consolidating the achievements so far, Republic of Moldova is fully committed to setting agricultural sector onto a sustainable growth path and enhancing the preservation of agricultural biodiversity.

Towards this direction, local and regional authorities, along with the local agricultural cooperatives and agricultural and trade institutions could manage to form a strong network to tackle all those issues and strengthen the agricultural sector in the Bălți municipality and in the wider Northern Development Region. BRIDGES is a first step to expand their knowledge, expertise and experiences in matching the trade needs and offer of the five (5) participating countries.

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ANNEXES

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ANNEX 1: Main export partners of the Republic of Moldova, 2020⁵⁷

No	COUNTRY	Exported value, 2020, thousand EUR	Share in exported value, 2020, thousand EUR	Change 2020/2019, %	EU/non-EU
1	Romania	619.168	28,4%	-9,4%	EU
2	Germany	197.666	9,1%	-10,0%	EU
3	Russian Federation	189.989	8,7%	-14,9%	non-EU
4	Italy	187.245	8,6%	-21,5%	EU
5	Turkey	150.439	6,9%	-4,1%	non-EU
6	Poland	96.169	4,4%	-4,8%	EU
7	Czech Republic	70.495	3,2%	21,8%	EU
8	Ukraine	60.879	2,8%	-15,0%	non-EU
9	Belarus	57.719	2,7%	-19,7%	non-EU
10	Switzerland	53.793	2,5%	-29,5%	non-EU
11	Bulgaria	50.955	2,3%	-9,4%	EU
12	Netherlands	47.275	2,2%	39,7%	EU
13	United Kingdom	37.468	1,7%	-16,0%	non-EU
14	Spain	30.370	1,4%	-10,9%	EU
15	France	25.959	1,2%	-19,3%	EU
16	Hungary	23.892	1,1%	140,2%	EU
17	Greece	23.691	1,1%	-32,5%	EU
18	United States of America	22.501	1,0%	3,5%	non-EU
19	Georgia	19.968	0,9%	6,6%	
20	Austria	19.909	0,9%	-28,1%	EU

⁵⁷ Intracen Trade Map <https://www.trademap.org/Index.aspx>

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ANNEX 2: Main import partners of the Republic of Moldova, 2020⁵⁸

No	COUNTRY	Imported value, 2020, thousand EUR	Share in imported value, 2020, thousand EUR	Change 2020/2019, %	EU/non-EU
1	China	565.960	11,9%	5,2%	non-EU
2	Romania	553.369	11,7%	-26,4%	EU
3	Russian Federation	528.472	11,1%	-14,6%	non-EU
4	Ukraine	462.227	9,7%	-9,0%	non-EU
5	Germany	396.273	8,4%	-8,4%	EU
6	Turkey	340.111	7,2%	-4,9%	non-EU
7	Italy	304.242	6,4%	-16,4%	EU
8	Poland	190.297	4,0%	5,7%	EU
9	France	106.270	2,2%	-19,1%	EU
10	Belarus	99.758	2,1%	-14,7%	non-EU
11	Hungary	88.026	1,9%	-9,5%	EU
12	Czech Republic	84.205	1,8%	-16,5%	EU
13	Spain	68.612	1,4%	-5,1%	EU
14	United States of America	59.972	1,3%	-9,7%	non-EU
15	Austria	54.973	1,2%	-33,2%	EU
16	Bulgaria	54.958	1,2%	9,4%	EU
17	Netherlands	52.292	1,1%	2,5%	EU
18	Kazakhstan	51.068	1,1%	390,7%	non-EU
19	Japan	49.438	1,0%	7,1%	non-EU
20	United Kingdom	43.936	0,9%	-16,3%	non-EU

⁵⁸ Intracen Trade Map <https://www.trademap.org/Index.aspx>

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ANNEX 3: Main trading partners of the Republic of Moldova, 2020⁵⁹

No	COUNTRY	EXPORTS	IMPORTS	TRADE VOLUME	TRADE BALANCE
1	Romania	619.168	553.369	1.172.537	65.799
2	Germany	197.666	396.273	593.939	-198.607
3	Russian Federation	189.989	528.472	718.461	-338.483
4	Italy	187.245	304.242	491.487	-116.997
5	Turkey	150.439	340.111	490.550	-189.672
6	Poland	96.169	190.297	286.466	-94.128
7	Czech Republic	70.495	84.205	154.700	-13.710
8	Ukraine	60.879	462.227	523.106	-401.348
9	Belarus	57.719	99.758	157.477	-42.039
10	Switzerland	53.793	30.358	84.151	23.435
11	Bulgaria	50.955	54.958	105.913	-4.003
12	Netherlands	47.275	52.292	99.567	-5.017
13	United Kingdom	37.468	43.936	81.404	-6.468
14	Spain	30.370	68.612	98.982	-38.242
15	France	25.959	106.270	132.229	-80.311
16	Hungary	23.892	88.026	111.918	-64.134
17	Greece	23.691	21.954	45.645	1.737
18	United States of America	22.501	59.972	82.473	-37.471
19	Georgia	19.968	4.235	24.203	15.733
20	Austria	19.909	54.973	74.882	-35.064

⁵⁹ Intracen Trade Map <https://www.trademap.org/Index.aspx>

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ANNEX 4: Moldova's Exports-Imports of Fruit and Vegetables⁶⁰

Exports of Fresh Fruit & Vegetables							
	PRODUCTS	2019		2020		Change	
		Value in thousand EUR	Quantity (in tons)	Value in thousand EUR	Quantity (in tons)	In EUR	In tons
1	VEGETABLES (FRESH, FROZEN, ETC.)	8.359	33.343	2.769	7.280	-66,9%	-78,2%
2	FRUITS & NUTS FRESH OR DRIED	189.022	375.101	198.091	321.697	4,8%	-14,2%
	TOTAL	197.381	408.444	200.860	328.977	1,8%	-19,5%
EXPORTED FRUITS AND VEGETABLES							
1	Apples, pears and quinces, fresh	48.089	218.412	68.541	193.617	42,5%	-11,4%
2	Other nuts, fresh or dried, whether or not shelled or peeled (excluding coconuts, Brazil nuts ...	80.919	18.955	62.782	12.679	-22,4%	-33,1%
3	Apricots, cherries, peaches incl. nectarines, plums and sloes, fresh	21.054	61.452	30.598	61.666	45,3%	0,3%
4	Grapes, fresh or dried	26.526	62.735	23.578	41.299	-11,1%	-34,2%
5	Dried apricots, prunes, apples, peaches, pears, papaws "papayas", tamarinds and other edible ...	8.819	8.540	9.696	8.904	9,9%	4,3%
6	Fresh strawberries, raspberries, blackberries, back, white or red currants, gooseberries and ...	2.601	3.468	2.221	2.794	-14,6%	-19,4%
7	Dried leguminous vegetables, shelled, whether or not skinned or split	6.479	27.054	2.151	5.234	-66,8%	-80,7%
8	Fruit and nuts, uncooked or cooked by	925	1.314	595	578	-35,7%	-56,0%

⁶⁰ Intracen Trade Map <https://www.trademap.org/Index.aspx>

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	steaming or boiling in water, frozen, whether or not ...						
9	Vegetables, uncooked or cooked by steaming or boiling in water, frozen	168	195	143	207	-14,9%	6,2%
10	Onions, shallots, garlic, leeks and other alliaceous vegetables, fresh or chilled	1.005	3.995	114	481	-88,7%	-88,0%

Import of Fresh Fruit & Vegetables							
	PRODUCTS	2019		2020		Change	
		Value in thousand EUR	Quantity (in tons)	Value in thousand EUR	Quantity (in tons)	In EUR	In tons
						2020/2019, %	
1	VEGETABLES (FRESH, FROZEN, ETC.)	58.904	110.265	53.887	94.986	-8,5%	-13,9%
2	FRUITS & NUTS FRESH OR DRIED	63.645	65.984	72.177	84.292	13,4%	27,7%
	TOTAL	122.549	176.249	126.064	179.278	2,9%	1,7%

Common borders. Common solutions.

ANNEX 5: Main Moldovan products exported to Romania⁶¹

No	CN4	PRODUCT	2019 (thousand EUR)	2020 (thousand EUR)	Change 2020/2019, %
1	'8544	Insulated "incl. enamelled or anodised" wire, cable	296.090	223.445	-24,5%
2	'1206	Sunflower seeds, whether or not broken	51.142	59.377	16,1%
3	'1205	Rape or colza seeds, whether or not broken	25.759	19.256	-25,2%
4	'7010	Carboys, bottles, flasks, jars, pots, phials, ampoules and other containers	17.173	19.218	11,9%
5	'2204	Wine of fresh grapes	14.348	18.879	31,6%
6	'9403	Furniture and parts thereof (excluding seats and medical)	14.380	15.937	10,8%
7	'8504	Electrical transformers, static converters	10.712	15.040	40,4%
8	'6307	Made-up articles of textile materials	8.742	11.285	29,1%
9	'1512	Sunflower-seed, safflower or cotton-seed oil	5.641	10.286	82,3%
10	'6204	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers, ...	19.751	9.835	-50,2%
11	'8708	Parts and accessories for tractors, motor vehicles	7.099	9.588	35,1%
12	'6203	Men's or boys' suits, ensembles, jackets, blazers, trousers, bib and brace overalls, breeches ...	10.030	9.380	-6,5%
13	'9503	Tricycles, scooters, pedal cars and similar wheeled toys	10.661	8.909	-16,4%
14	'2008	Fruits, nuts and other edible parts of plants, prepared or preserved,	4.858	8.373	72,4%
15	'1905	Bread, pastry, cakes, biscuits and other bakers' wares	7.647	8.231	7,6%
16	'6406	Parts of footwear	11.453	8.030	-29,9%
17	'0806	Grapes, fresh or dried	9.143	7.940	-13,2%
18	'7019	Glass fibres, incl. glass wool	8.161	7.751	-5,0%
19	'4415	Packing cases, boxes, crates, drums	9.530	7.263	-23,8%
20	'3923	Articles for the conveyance or packaging of goods, of plastics	6.146	6.541	6,4%

⁶¹ Intracen Trade Map <https://www.trademap.org/Index.aspx>

Common borders. Common solutions.

ANNEX 6: Main Moldovan Agri-food products exported to Romania⁶²

No	CN4	PRODUCT	2019 (thousand EUR)	2020 (thousand EUR)	Change 2020/2019, %
1	'1206	Sunflower seeds, whether or not broken	51.142	59.377	16,1%
2	'1205	Rape or colza seeds, whether or not broken	25.759	19.256	-25,2%
3	'2204	Wine of fresh grapes, incl. fortified wines; grape must, partly fermented and of an actual ...	14.348	18.879	31,6%
4	'1512	Sunflower-seed, safflower or cotton-seed oil	5.641	10.286	82,3%
5	'2008	Fruits, nuts and other edible parts of plants, prepared or preserved, whether or not containing ...	4.858	8.373	72,4%
6	'1905	Bread, pastry, cakes, biscuits and other bakers' wares, whether or not containing cocoa; communion ...	7.647	8.231	7,6%
7	'0806	Grapes, fresh or dried	9.143	7.940	-13,2%
8	'0809	Apricots, cherries, peaches incl. nectarines, plums and sloes, fresh	3.189	3.869	21,3%
9	'1201	Soya beans, whether or not broken	3.889	3.750	-3,6%
10	'1005	Maize or corn	6.565	3.549	-45,9%
11	'0802	Other nuts, fresh or dried, whether or not shelled or peeled (excluding coconuts, Brazil nuts)	1.502	2.711	80,5%
12	'1806	Chocolate and other food preparations containing cocoa	2.382	2.244	-5,8%
13	'0813	Dried apricots, prunes, apples, peaches, pears, papaws "papayas"	1.465	1.622	10,7%
14	'2207	Undenatured ethyl alcohol of an alcoholic strength of >= 80%	925	1.598	72,8%
15	'1701	Cane or beet sugar and chemically pure sucrose, in solid form	1.226	1.524	24,3%
16	'2005	Other vegetables prepared or preserved otherwise than by vinegar or acetic acid	425	1.382	225,2%
17	'1207	Other oil seeds and oleaginous fruits, whether or not broken (excluding edible nuts, olives)	1.532	1.347	-12,1%
18	'1703	Molasses resulting from the extraction or refining of sugar	1.826	1.258	-31,1%
19	'1507	Soya-bean oil and its fractions, whether or not refined (excluding chemically modified)	1.335	1.217	-8,8%
20	'1001	Wheat and meslin	3.521	1.118	-68,2%

⁶² Intracen Trade Map <https://www.trademap.org/Index.aspx>

Common borders. Common solutions.

ANNEX 7: Main imported products by Moldova from Romania⁶³

No	CN4	PRODUCT	2019 (thousand EUR)	2020 (thousand EUR)	Change 2020/2019, %
1	'2710	Petroleum oils and oils obtained from bituminous minerals	436.709	233.672	-46,5%
2	'8544	Insulated "incl. enamelled or anodised" wire, cable	32.698	28.703	-12,2%
3	'7308	Structures and parts of structures	14.047	11.966	-14,8%
4	'2304	Oilcake and other solid residues	8.778	11.346	29,3%
5	'3004	Medicaments for therapeutic or prophylactic uses	9.083	10.368	14,1%
6	'1005	Maize or corn	7.286	10.212	40,2%
7	'8703	Motor cars and other motor vehicles	12.231	10.002	-18,2%
8	'4410	Particle board, oriented strand board "OSB" and similar board	7.742	7.959	2,8%
9	'2711	Petroleum gas and other gaseous hydrocarbons	6.889	7.752	12,5%
10	'3917	Tubes, pipes and hoses, and fittings therefor	5.758	7.456	29,5%
11	'1206	Sunflower seeds, whether or not broken	7.827	6.970	-10,9%
12	'3808	Insecticides, rodenticides, fungicides, herbicides, anti-sprouting products and plant-growth	5.665	5.434	-4,1%
13	'0403	Buttermilk, curdled milk and cream, yogurt, kephir and other fermented or acidified milk	4.323	5.007	15,8%
14	'2517	Pebbles, gravel, broken or crushed stone	4.360	4.916	12,8%
15	'9403	Furniture and parts thereof, (excluding seats and medical, surgical, dental or veterinary)	5.334	4.666	-12,5%
16	'3214	Glaziers' putty, grafting putty, resin cements	4.108	4.108	0,0%
17	'6810	Articles of cement, concrete or artificial stone	3.644	4.087	12,2%
18	'8708	Parts and accessories for tractors, motor vehicles	3.797	4.085	7,6%
19	'3923	Articles for the conveyance or packaging of goods, of plastics;	4.205	3.931	-6,5%
20	'7210	Flat-rolled products of iron or non-alloy steel	3.296	3.907	18,5%

⁶³ Intracen Trade Map <https://www.trademap.org/Index.aspx>

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ANNEX 8: Main Agri-food products imported by Moldova from Romania⁶⁴

No	CN4	PRODUCT	2019 (thousand EUR)	2020 (thousand EUR)	Change 2020/2019, %
1	'1005	Maize or corn	7.286	10.212	40,2%
2	'1206	Sunflower seeds	7.827	6.970	-10,9%
3	'0403	Buttermilk, curdled milk and cream, yogurt, kephir and other fermented or acidified milk	4.323	5.007	15,8%
4	'0401	Milk and cream	2.582	3.218	24,6%
5	'2203	Beer made from malt	2.598	2.946	13,4%
6	'0701	Potatoes, fresh or chilled	956	2.925	206,0%
7	'2202	Waters, incl. mineral waters and aerated waters, containing added sugar	2.377	2.686	13,0%
8	'2106	Food preparations	2.391	2.512	5,1%
9	'1905	Bread, pastry, cakes, biscuits and other bakers' wares	2.322	2.499	7,6%
10	'2005	Other vegetables prepared or preserved otherwise than by vinegar or acetic acid	2.368	2.285	-3,5%
11	'2201	Waters, incl. natural or artificial mineral waters	2.660	2.098	-21,1%
12	'0304	Fish fillets and other fish meat, fresh, chilled or frozen	832	1.807	117,2%
13	'0207	Meat and edible offal of fowls of the species Gallus domesticus, ducks, geese, turkeys	1.851	1.351	-27,0%
14	'1602	Prepared or preserved meat, offal or blood (excluding sausages and similar products)	1.251	1.277	2,1%
15	'0707	Cucumbers and gherkins, fresh or chilled	518	1.186	129,0%
16	'0406	Cheese and curd	980	976	-0,4%
17	'0702	Tomatoes, fresh or chilled	697	949	36,2%
18	'1904	Prepared foods obtained by the swelling or roasting of cereals or cereal products	863	907	5,1%
19	'1006	Rice	690	770	11,6%
20	'1517	Margarine	919	715	-22,2%

⁶⁴ Intracen Trade Map <https://www.trademap.org/Index.aspx>

Common borders. Common solutions.

ANNEX 9: Main Moldovan products exported to Armenia⁶⁵

No	CN4	PRODUCT	2019 (thousand EUR)	2020 (thousand EUR)	Change 2020/2019, %
1	'3004	Medicaments for therapeutic or prophylactic uses	495	310	-37,4%
2	'7010	Carboys, bottles, flasks, jars, pots, phials, ampoules	81	281	246,9%
3	'3402	Organic surface-active agents (excluding soap)	155	153	-1,3%
4	'2005	Other vegetables prepared or preserved otherwise than by vinegar or acetic acid	50	130	160,0%
5	'9603	Brooms, brushes, incl. brushes constituting parts of machines	25	60	140,0%
6	'2208	Undenatured ethyl alcohol of an alcoholic strength of < 80%	1.820	33	-98,2%
7	'3923	Articles for the conveyance or packaging of goods, of plastics	25	33	32,0%
8	'2204	Wine of fresh grapes, incl. fortified wines	2	29	1350,0%
9	'9401	Seats, whether or not convertible into beds	59	24	-59,3%
10	'8422	Dishwashing machines; machinery for cleaning or drying bottles	263	19	-92,8%
11	'8419	Machinery, plant or laboratory equipment	0	14	-
12	'1905	Bread, pastry, cakes, biscuits and other bakers' wares	19	14	-26,3%
13	'8421	Centrifuges, incl. centrifugal dryers	0	11	-
14	'0602	Live plants incl. their roots, cuttings and slips; mushroom spawn	11	10	-9,1%

⁶⁵ Intracen Trade Map <https://www.trademap.org/Index.aspx>

Common borders. Common solutions.

ANNEX 10: Main Moldovan exported products to Greece⁶⁶

No	CN4	PRODUCT	2019 (thousand EUR)	2020 (thousand EUR)	Change 2020/2019, %
1	'1005	Maize or corn	6.559	6.180	-5,8%
2	'1001	Wheat and meslin	11.467	6.158	-46,3%
3	'2207	Undenatured ethyl alcohol of an alcoholic strength of >= 80	2.973	5.395	81,5%
4	'7010	Carboys, bottles, flasks, jars, pots, phials, ampoules	3.614	3.146	-12,9%
5	'0802	Other nuts, fresh or dried (excluding coconuts, Brazil nuts)	2.146	1.136	-47,1%
6	'1003	Barley	1.363	711	-47,8%
7	'1206	Sunflower seeds	4.690	335	-92,9%
8	'2401	Unmanufactured tobacco; tobacco refuse	371	119	-67,9%
9	'1703	Molasses resulting from the extraction or refining of sugar	0	110	-
10	'1806	Chocolate and other food preparations containing cocoa	76	68	-10,5%
11	'2204	Wine of fresh grapes, incl. fortified wines;	70	53	-24,2%
12	'1905	Bread, pastry, cakes, biscuits and other bakers' wares	48	49	2,0%
13	'5402	Synthetic filament yarn	0	33	-
14	'2008	Fruits, nuts and other edible parts of plants, prepared or preserved	27	31	14,8%
15	'3923	Articles for the conveyance or packaging of goods, of plastics	21	30	42,8%
16	'1704	Sugar confectionery not containing cocoa	23	29	26,0%
17	'4819	Cartons, boxes, cases, bags and other packing containers	19	26	36,8%
18	'7019	Glass fibres, incl. glass wool	72	25	-65,2%
19	'5702	Carpets and other textile floor coverings, woven	0	12	-
20	'1101	Wheat or meslin flour	5	11	120,0%

⁶⁶ Intracen Trade Map <https://www.trademap.org/Index.aspx>

Common borders. Common solutions.

ANNEX 11: Main imported products by Republic of Moldova from Greece⁶⁷

No	CN4	PRODUCT	2019 (thousand EUR)	2020 (thousand EUR)	Change 2020/2019, %
1	'3105	Mineral or chemical fertilisers	2.824	2.713	-3,9%
2	'2005	Other vegetables prepared or preserved otherwise than by vinegar or acetic acid	1.678	1.598	-4,8%
3	'0810	Fresh strawberries, raspberries, blackberries, back, white or red currants, gooseberries	1.659	1.510	-9,0%
4	'0805	Citrus fruit, fresh or dried	1.167	1.167	0,0%
5	'0809	Apricots, cherries, peaches incl. nectarines, plums and sloes, fresh	1.125	1.161	3,2%
6	'7411	Copper tubes and pipes	603	1.080	79,1%
7	'8428	Lifting, handling, loading or unloading machinery	1.370	1.039	-24,2%
8	'3102	Mineral or chemical nitrogenous fertilisers (480	940	95,8%
9	'9406	Prefabricated buildings	146	721	393,8%
10	'3004	Medicaments for therapeutic or prophylactic uses	726	548	-24,5%
11	'0807	Melons, incl. watermelons, and papaws (papayas), fresh	8	502	6175,0%
12	'3920	Plates, sheets, film, foil and strip, of non-cellular plastics	347	500	44,1%
13	'7604	Bars, rods and profiles, of aluminium	380	438	15,3%
14	'0302	Fish, fresh or chilled	473	436	-7,8%
15	'8433	Harvesting or threshing machinery	182	311	70,9%
16	'7607	Aluminium foil	92	274	197,8%
17	'2402	Cigars, cheroots, cigarillos and cigarettes of tobacco	406	264	-35,0%
18	'8212	Non-electric razors and razor blades of base metal	148	241	62,8%
19	'0602	Live plants incl. their roots, cuttings and slips; mushroom spawn	131	224	71,0%
20	'1902	Pasta	36	218	505,6%

⁶⁷ Intracen Trade Map <https://www.trademap.org/Index.aspx>

Common borders. Common solutions.

ANNEX 12: Main Moldovan Agri-food products exported to Greece⁶⁸

No	CN4	PRODUCT	2019 (thousand EUR)	2020 (thousand EUR)	Change 2020/2019, %
1	'1005	Maize or corn	6.559	6.180	-5,8%
2	'1001	Wheat and meslin	11.467	6.158	-46,3%
3	'2207	Undenatured ethyl alcohol of an alcoholic strength of >= 80%	2.973	5.395	81,5%
4	'0802	Other nuts, fresh or dried, (excluding coconuts, Brazil nuts)	2.146	1.136	-47,1%
5	'1003	Barley	1.363	711	-47,8%
6	'1206	Sunflower seeds	4.690	335	-92,9%
7	'1703	Molasses resulting from the extraction or refining of sugar	0	110	-
8	'1806	Chocolate and other food preparations containing cocoa	76	68	-10,5%
9	'2204	Wine of fresh grapes	70	53	-24,3%
10	'1905	Bread, pastry, cakes, biscuits and other bakers' wares	48	49	2,1%
11	'2008	Fruits, nuts and other edible parts of plants, prepared or preserved	27	31	14,8%
12	'1704	Sugar confectionery not containing cocoa	23	29	26,1%
13	'1101	Wheat or meslin flour	5	11	120,0%
14	'2001	Vegetables, fruit, nuts and other edible parts of plants, prepared or preserved by vinegar ...	3	4	33,3%
15	'2202	Waters, incl. mineral waters and aerated waters	4	4	0,0%
16	'2005	Other vegetables prepared or preserved otherwise than by vinegar or acetic acid,	1	3	200,0%
17	'1104	Cereal grains otherwise worked	3	3	0,0%
18	'2007	Jams, fruit jellies, marmalades, fruit or nut purée	0	2	-
19	'2009	Fruit juices, incl. grape must, and vegetable juices	1	1	0,0%

⁶⁸ Intracren Trade Map <https://www.trademap.org/Index.aspx>

Common borders. Common solutions.

ANNEX 13: Main imported Agri-food products by Moldova from Greece⁶⁹

No	CN4	PRODUCT	2019 (thousand EUR)	2020 (thousand EUR)	Change 2020/2019, %
1	'2005	Other vegetables prepared or preserved otherwise than by vinegar or acetic acid, not frozen ...	1.678	1.598	-4,8%
2	'0810	Fresh strawberries, raspberries, blackberries, back, white or red currants, gooseberries and ...	1.659	1.510	-9,0%
3	'0805	Citrus fruit, fresh or dried	1.167	1.167	0,0%
4	'0809	Apricots, cherries, peaches incl. nectarines, plums and sloes, fresh	1.125	1.161	3,2%
5	'0807	Melons, incl. watermelons, and papaws (papayas), fresh	8	502	6175,0%
6	'0302	Fish, fresh or chilled (excluding fish fillets and other fish meat of heading 0304)	473	436	-7,8%
7	'0602	Live plants incl. their roots, cuttings and slips; mushroom spawn (excluding bulbs, tubers, ...)	131	224	71,0%
8	'1902	Pasta, whether or not cooked or stuffed with meat or other substances or otherwise prepared, ...	36	218	505,6%
9	'1509	Olive oil and its fractions obtained from the fruit of the olive tree solely by mechanical ...	154	201	30,5%
10	'0701	Potatoes, fresh or chilled	55	187	240,0%
11	'1006	Rice	26	103	296,2%
12	'2208	Undenatured ethyl alcohol of an alcoholic strength of < 80%; spirits, liqueurs and other spirituous ...	291	101	-65,3%
13	'1904	Prepared foods obtained by the swelling or roasting of cereals or cereal products, e.g. corn ...	105	99	-5,7%
14	'1905	Bread, pastry, cakes, biscuits and other bakers' wares, whether or not containing cocoa; communion ...	59	91	54,2%
15	'2008	Fruits, nuts and other edible parts of plants, prepared or preserved, whether or not containing ...	96	88	-8,3%

⁶⁹ Intracen Trade Map <https://www.trademap.org/Index.aspx>

Common borders. Common solutions.

16	'2009	Fruit juices, incl. grape must, and vegetable juices, unfermented, not containing added spirit, ...	47	81	72,3%
17	'2106	Food preparations, n.e.s.	58	80	37,9%
18	'1510	Other oils and their fractions, obtained solely from olives, whether or not refined, but not ...	34	57	67,6%
19	'0406	Cheese and curd	49	52	6,1%
20	'2202	Waters, incl. mineral waters and aerated waters, containing added sugar or other sweetening ...	7	42	500,0%

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ANNEX 14: Main Moldovan exported products to Turkey⁷⁰

No	CN4	PRODUCT	2019 (thousand EUR)	2020 (thousand EUR)	Change 2020/2019, %
1	'1206	Sunflower seeds	78.174	51.248	-34,4%
2	'1005	Maize or corn	21.977	16.811	-23,5%
3	'2207	Undenatured ethyl alcohol of an alcoholic strength of >= 80%	4.966	12.574	153,2%
4	'1512	Sunflower-seed, safflower or cotton-seed oil	0	12.066	-
5	'6109	T-shirts, singlets and other vests, knitted or crocheted	11.460	10.622	-7,3%
6	'6110	Jerseys, pullovers, cardigans, waistcoats and similar articles, knitted or crocheted	3956	7.249	83,2%
7	'7204	Ferrous waste and scrap	0	4.824	-
8	'7602	Waste and scrap, of aluminium	2234	4107	83,8%
9	'2303	Residues of starch manufacture and similar residues	3831	3517	-8,2%
10	'1201	Soya beans	3777	3218	-14,8%
11	'6103	Men's or boys' suits, ensembles, jackets, blazers, trousers	2372	3217	35,6%
12	'6105	Men's or boys' shirts, knitted or crocheted (excluding nightshirts, T-shirts)	4187	2847	-32,0%
13	'1001	Wheat and meslin	2944	2744	-6,8%
14	'8403	Central heating boilers, non- electric	519	2396	361,7%
15	'6104	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts	1213	1715	41,4%
16	'4412	Plywood, veneered panel and similar laminated wood	907	1352	49,1%
17	'2204	Wine of fresh grapes	711	1234	73,6%
18	'7326	Articles of iron or steel	1032	1205	16,8%
19	'0802	Other nuts, fresh or dried, (excluding coconuts, Brazil nuts)	5107	1122	-78,0%
20	'7010	Carboys, bottles, flasks, jars, pots, phials, ampoules	1234	789	-36,1%

⁷⁰ Intracen Trade Map <https://www.trademap.org/Index.aspx>

Common borders. Common solutions.

ANNEX 15: Main Moldovan Agri-food products exported to Turkey⁷¹

No	CN4	PRODUCT	2019 (thousand EUR)	2020 (thousand EUR)	Change 2020/2019, %
1	'1206	Sunflower seeds	78.174	51.248	-34,44%
2	'1005	Maize or corn	21.977	16.811	-23,51%
3	'2207	Undenatured ethyl alcohol of an alcoholic strength of \geq 80%	4.966	12.574	153,20%
4	'1512	Sunflower-seed, safflower or cotton-seed oil	0	12.066	-
5	'1201	Soya beans	3.777	3.218	-14,80%
6	'1001	Wheat and meslin	2.944	2.744	-6,79%
7	'2204	Wine of fresh grapes	711	1.234	73,56%
8	'0802	Other nuts, fresh or dried (excluding coconuts, Brazil nuts)	5.107	1.122	-78,03%
9	'1007	Grain sorghum	46	463	906,52%
10	'1404	Vegetable products	661	390	-41,00%
11	'0813	Dried apricots, prunes, apples, peaches, pears	132	210	59,09%
12	'0806	Grapes, fresh or dried	198	70	-64,65%
13	'1106	Flour, meal and powder of peas, beans, lentils	0	70	-
14	'1905	Bread, pastry, cakes, biscuits and other bakers' wares	362	64	-82,32%
15	'2208	Undenatured ethyl alcohol of an alcoholic strength of $<$ 80%	58	38	-34,48%
16	'1207	Other oil seeds and oleaginous fruits	9	30	233,33%
17	'1704	Sugar confectionery not containing cocoa	15	16	6,67%
18	'1211	Plants and parts of plants	0	12	-
19	'0602	Live plants incl. their roots, cuttings and slips; mushroom spawn	8	7	-12,50%

⁷¹ Intracen Trade Map <https://www.trademap.org/Index.aspx>

Common borders. Common solutions.

ANNEX 16: Main products imported by Moldova from Turkey⁷²

No	CN4	PRODUCT	2019 (thousand EUR)	2020 (thousand EUR)	Change 2020/2019, %
1	'7408	Copper wire (excluding surgical sutures, stranded wire, cables, plaited bands)	18.268	19.775	8,25%
2	'6117	Made-up clothing accessories, knitted or crocheted	14.929	15.546	4,13%
3	'3004	Medicaments for therapeutic or prophylactic uses, put ...	9.820	13.398	36,44%
4	'0805	Citrus fruit, fresh or dried	10.059	12.380	23,07%
5	'0702	Tomatoes, fresh or chilled	9.247	8.535	-7,70%
6	'8403	Central heating boilers, non-electric	6082	6.550	7,69%
7	'6006	Fabrics, knitted or crocheted	6.900	5.996	-13,10%
8	'6204	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts	5844	5399	-7,61%
9	'6110	Jerseys, pullovers, cardigans, waistcoats and similar articles, knitted or crocheted	4769	5294	11,01%
10	'9619	Sanitary towels (pads) and tampons, napkins and napkin liners for babies	4596	4574	-0,48%
11	'8516	Electric instantaneous or storage water heaters and immersion heaters	3600	4484	24,56%
12	'5603	Nonwovens, coated, covered or laminated	1006	4481	345,43%
13	'8708	Parts and accessories for tractors, motor vehicles	4757	4234	-10,99%
14	'8302	Base metal mountings, fittings	4207	4197	-0,24%
15	'6109	T-shirts, singlets and other vests, knitted or crocheted	5192	4163	-19,82%
16	'6203	Men's or boys' suits, ensembles, jackets, blazers, trousers	5269	4151	-21,22%
17	'7322	Radiators for central heating, non-electrically heated	4346	4126	-5,06%
18	'3917	Tubes, pipes and hoses, and fittings	3494	3992	14,25%
19	'6907	Unglazed ceramic flags and paving, hearth or wall tiles	596	3990	569,46%
20	'5407	Woven fabrics of synthetic filament yarn	4751	3921	-17,47%

⁷² Intracen Trade Map <https://www.trademap.org/Index.aspx>

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ANNEX 17: Main Agri-food products imported by Moldova from Turkey⁷³

No	CN4	PRODUCT	2019 (thousand EUR)	2020 (thousand EUR)	Change 2020/2019, %
1	'0805	Citrus fruit, fresh or dried	10.059	12.380	23,07%
2	'0702	Tomatoes, fresh or chilled	9.247	8.535	-7,70%
3	'1206	Sunflower seeds	1.506	3.264	116,73%
4	'0709	Other vegetables, fresh or chilled (excluding potatoes, tomatoes)	2.797	2.585	-7,58%
5	'0707	Cucumbers and gherkins, fresh or chilled	2.106	2.024	-3,89%
6	'1704	Sugar confectionery not containing cocoa	1139	1.829	60,58%
7	'0810	Fresh strawberries, raspberries, blackberries, black, white or red currants	1.260	1.574	24,92%
8	'2008	Fruits, nuts and other edible parts of plants, prepared or preserved	1186	1079	-9,02%
9	'1806	Chocolate and other food preparations containing cocoa	625	860	37,60%
10	'2106	Food preparations	821	707	-13,89%
11	'1905	Bread, pastry, cakes, biscuits and other bakers' wares	507	648	27,81%
12	'0302	Fish, fresh or chilled	352	633	79,83%
13	'1902	Pasta	292	514	76,03%
14	'0602	Live plants incl. their roots, cuttings and slips; mushroom spawn	456	394	-13,60%
15	'0813	Dried apricots, prunes, apples, peaches, pears, papaws "papayas"	573	384	-32,98%
16	'0703	Onions, shallots, garlic, leeks	460	241	-47,61%
17	'2005	Other vegetables prepared or preserved otherwise than by vinegar or acetic acid,	197	234	18,78%
18	'1904	Prepared foods obtained by the swelling or roasting of cereals or cereal products	126	230	82,54%
19	'2102	Yeasts, active or inactive	157	215	36,94%
20	'0804	Dates, figs, pineapples, avocados, guavas, mangoes	225	200	-11,11%

⁷³ Intracen Trade Map <https://www.trademap.org/Index.aspx>

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Joint Operational Programme Black Sea Basin 2014-2020

The editor of the material: Municipality of Nestos

Date of publishing: August 2021

Joint Operational Programme Black Sea Basin 2014-2020 is co-financed by the European Union through the European Neighbourhood Instrument and by the participating countries: Armenia, Bulgaria, Georgia, Greece, Republic of Moldova, Romania, Turkey and Ukraine.

This publication was produced with the financial assistance of the European Union. Its contents are the sole responsibility of the Municipality of Nestos and do not necessarily reflect the views of the European Union.

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