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3rd NEWSLETTER

LOC Food-Local Development and Cross Border Cooperation
In the area of Agricultural Products and traditional Food



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LOC-FOOD project

Welcome to the third newsletter of the LOC-FOOD project (locfood.eu). In this newsletter we continue our series of articles on the market situation for traditional foods in the participating countries with a report from Bulgaria. We report on some of the project activities such as the fourth and final international food festival which took place in Greece, the training seminars for producers in Greece, and the publication of the marketing guidelines for traditional products. The foods that will be submitted by each country to the European Commission for certification under the EU quality scheme are presented. The final article examines organic farming statistics in the EU and in the LOC-FOOD member states.



Traditional Agricultural Products and Food in Bulgaria



Bulgaria

Bulgaria occupies the eastern part of the Balkan Peninsula in South-eastern Europe. Situated on the crossroads between West and East and founded in the 7th century, it is one of the oldest states in Europe. Within a relatively small area, Bulgarian landscape exhibits a striking variety. Open expanses of lowland alternate with mountains cut by deep river gorges, while the Black sea coast offers golden sandy beaches and attracts a number of visitors. The country boasts a mix of Eastern and Western cultural heritage, which is evident in cuisine, architecture, religion and traditions.

The administrative division encompasses six regions of planning. The areas that belong the Black Sea Basin are included in the NUTS II North-East and South-East Planning Regions.

The North East planning region embodies the biggest share of the arable land of the country. The most developed production here is of crops and cereal. Wheat, corn and sunflower seeds are the main agri-produce. In the western part (Targovishte and Svishtov districts) vineyards and orchards (mostly plums and apricots) are also cultivated.

The South East region, due to the warmer climate is famous for its vineyards, orchards and vegetable gardens. Here one third of all the grapes in the country are grown. The main fruits are peaches, cherries and apples, while the vegetables are mostly represented by onion, tomatoes and cucumbers. This region encompasses several environmentally clean areas near the East Stara Planina and Strandja, which makes it particularly suitable for organic farming and animal rearing.



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Bulgaria

Agriculture and agro-food industry

Agriculture has always been a historically important sector of the Bulgarian economy. Just a few decades ago, a large share of the population was involved into some type of agricultural activity, farming or husbandry. The favourable climate for crop production and the availability of agricultural land have resulted in well-developed plant growing and animal breeding. Agriculture accounts for 3.7% of the national GDP, which is higher than the EU average of 1.6% (value added by agriculture, forestry and fishing; data from The World Bank).

Some of the main competitive advantages of the Bulgarian agricultural sector are:

- Favourable natural conditions for the cultivation of a wide variety of crops, fruits and vegetables
- Farming land is roughly 50% of the territory of the country
- Large diversity of soils, the majority of which are fertile, clean and unpolluted
- Well preserved, unpolluted areas (about 90% of the land in Bulgaria is suitable for organic farming) allowing the harvest of wild growing crops like mushrooms, herbs and berries
- High health and environment protection standards which guarantee the quality of the Bulgarian food products
- Strong traditions in farming and husbandry
- High-quality research, training and networking among both public and private institutions.

The food sector is also essential for Bulgaria. For both Black Sea Basin regions the majority of the food companies are specialized in production of bread and bakery products, followed by milk and dairy products and chocolate and sugar confectionery.

Traditional cuisine

The main features of the Bulgarian cuisine are slow cooking and use of fresh vegetables. Bulgarian traditional cooking techniques are healthy, economically efficient and eco-friendly. Many recipes are passed from generation to generation and are considered a part of the national wealth and heritage. Bulgarian cuisine is a wonderful blend of original and unique products as well as influences from abroad, reflecting its historical and social development. Spices are heavily used, mainly red paprika, parsley and dill. In many Bulgarian families (especially in the villages), the tradition of canning and preserving the products of their farms is valued and maintained. Functional foods like yoghurt and honey are essential in the Bulgarian culinary tradition.



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Bulgaria

Products with Geographical Indications (PDO, PGI or TSG)

Seventy-four Bulgarian products have GI labels, but only 8 of them are for food products: one PDO, two PGIs and five TSGs. The rest are 54 wines and 12 spirit drinks.

The legal protection of GIs regarding agri-food products until 2018 was granted by the Law on Marks and Geographical Indications and legal protection was granted through registration with the Patent Office of Bulgaria. After 2018, these products need to be registered as to the requirements of EC Regulation 1151/2012 with the Ministry of Agriculture and Food.

Here are some of these products:

Strandzhanski manov med (honeydew honey from Strandzha region) - PDO

This honey is produced in the uncontaminated environment of the Strandzha mountain region. The main food of the bees is the sweet honeydew which is formed by small insects in the oak trees of the region. The honeydew is sweet and juicy and the honey produced from it is darker than the other types of honey, combining sweet, sour and bitter aftertaste.



Bulgarian Rose Oil - PGI

This is one of the most symbolic national products, also called “Bulgarian gold”. It is an essential oil produced by specific rose breed - *Rosa damascena* and the area of production is called “Rose Valley” (in South East region), near Karlovo, Kalofer and Kazanlak.

Kayserovan vrat Trakiya (Meat delicacy) - TSG

Kayserovan vrat Trakiya is a raw-cured delicacy of uncut meat. It is prepared from fresh boneless pork shoulder and is pressed repeatedly during curing and coated with Kaiser coating (mixture of natural herbs and white wine).

Govezhda pastarma (Meat delicacy) - TSG

The pastarma is made out of pure, fresh beef. It is raw-cured and coated with herbs and salts (usually thyme, sage, savory and rosemary).



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Bulgaria

PDO Applicants

Bulgarsko kiselo mliako (Bulgarian Yogurt)

The product (called in Bulgaria “sour milk”) is well known for its supreme nutritional qualities and health benefits. It is produced after a fermentation process out of cow, sheep, goat or buffalo milk. One of the starter bacteria - *Lactobacillus bulgaricus* is closely associated with the region of Bulgaria for centuries. Though there are many types of yogurts around the world, none tastes just like the the Bulgarian.



Bulgarsko bialo salamureno sirene (Bulgarian white cheese)

This is another staple in the Bulgarian traditional cuisine. It is a type of brined cheese made out of the milk of goats, sheep, cows or buffalo or the mixture of it. It is slightly crumbly with 44-48% of fat content. It is similar to Feta cheese, but saltier and with more distinctive, pungent aroma and taste.

Source of the images: FreePik

International food festival in Greece

In November it was Greece's turn to host the LOC-FOOD international food festival. Because the event took place in the late Autumn, it was held indoors in the Cultural Centre in New Malgara, a village a few kilometres west of Thessaloniki. The hall was filled with the colours and aromas of traditional food from the LOC-FOOD project area. Exhibitors from Romania, Moldova, Bulgaria and the Greek administrative Regions of Central Macedonia and Eastern Macedonia and Thrace displayed their wares and offered samples to the visitors to taste. Around five exhibitors were in attendance from each of the visiting countries, together with a larger number from Greece. The large variety of products on offer included cheeses, pickles, spreads and dips from vegetables and fish, pasta and noodles, fruits and fruit juices, olives, oils, bakery and confectionery goods, wines, and many others. Visitors had the chance to sample high quality products from Greece and to try foods from other countries that they were perhaps not familiar with. For everyone it was an opportunity to share ideas and experiences with food producers from other countries and to learn about the gastronomy of our Balkan neighbours.

Invited guests from local government addressed the festival and greeted the exhibitors. These included the Mayor of Delta Municipality Mr. Ioannis Ioannidis, the Vice-Governor of the Region of Central Macedonia with responsibility for the agricultural economy, Mr. Georgios Kefalas, and the Vice Governor for the Metropolitan District of Thessaloniki, Mrs. Voula Patoulidou. A speech was also given by Professor Petros Samaras, the Dean of the Faculty of Geosciences at International Hellenic University (IHU). Prof. Maria Papageorgiou, lead scientist of the IHU team, coordinated the event.

One of the highlights of the festival was a live cooking demonstration by the chef Georgos Palisidis. He cooked on a portable stove in the main hall so that everybody could see the process and enjoy the mouthwatering aromas wafting up from the pot. The dish he chose was mussel pilau, selected in order to showcase two of the renowned products from the Central Macedonia area: rice, grown around Thessaloniki and Serres, and mussels from the Thermaic Gulf. Before the cooking, the watching visitors were treated to a demonstration of the pastry chef's art: Mr. Philippos Bantis showed how the pastry used for bougatsa is skilfully stretched out into large thin sheets by turning it repeatedly in the air before it is filled and folded. While the mussels were cooking, Mrs Parthena Papadopoulou from the Women's Agricultural Cooperative for Traditional Products of Agios Antonios showed how to make a very quick and tasty cheese pie in a frying pan using feta cheese and 'perek', the flour tortillas from Pontiac traditional cuisine. After the cooking demonstrations, all present were able to enjoy a warm plate of mussel pilau before leaving.

In addition to all the gastronomic offerings, the visitors and exhibitors were entertained with a display of traditional Greek dances by local schoolchildren. The dancers, from the cultural group of N. Malgara, gave an excellent performance and were very warmly received by the watching crowd.



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International food festival in Greece



Photographs from the Food Festival. From top, left to right: Exhibitors discussing their wares with visitors; Traditional Greek dancers entertain the crowd; Mrs. Voula Patoulidou, Vice-Governor of the Region of Central Macedonia for the Metropolitan Area of Thessaloniki, presents certificates of participation to exhibitors; Mr. Philippos Bantis demonstrates the skills of the pastry chef by making bougatsa; Mrs. Parthena Papadopoulou shows how to use perek tortillas to make a quick and tasty cheese pie; The live cooking demonstration - mussel pilau.

International food festival in Greece



Anastasios Zafeiridis, LOC-FOOD project leader, and Professor Maria Papageorgiou, leader of the International Hellenic University team and organizer of the food festival, help cook the mussel pilau.

Products submitted to the European Commission for geographical indication certification

One of the central tasks of the LOC-FOOD project is to coordinate and assist producers with applications for selected products to obtain certification under the European Union quality scheme. There are three certification types: Protected Designation of Origin (PDO), Protected Geographical Indication (PGI), and Traditional Speciality Guaranteed (TSG). All of these certifications protect the names of traditional food products from imitations, as only products produced according to the specifications in the certification are allowed to use the name. For example, somebody making a white brined cheese outside of Greece or using only cow's milk cannot call it 'feta cheese'.

PDO and PGI certifications link the product to a particular area, and only products made within the designated area are allowed to use the protected name. For PDO certification all the main ingredients must be sourced from the designated area, while PGI certification is less strict: the product must be made within the area, but the main ingredients can be from elsewhere. In both cases the product must be shown to have a history in the area of at least 25 years, so new products are excluded from these certifications. TSG certification is different in that the production of the product is not tied to a particular area, but it must be made using a specified method. In this way, traditional products that are often largely hand-made are protected from cheaper, industrially-produced versions. Existing registered products and applications in process can be found in the online searchable database e-Ambrosia.

All three certifications are useful not only to protect the name of the products, but for marketing. Discerning consumers can recognise the seals and are assured that they are buying a product with tradition and defined quality. It should be noted that, once a certification has been granted, the use of the seal is allowed for anyone whose product conforms to the defined specifications. It is not restricted to the original applicants.



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Products submitted to the European Commission for geographical indication certification

In addition to PDO, PGI and TSG, products may also be submitted to other schemes such as organic certification (which applies only to the applicant). For this they must meet the requirements laid down in EU regulation 2018/848. The products submitted for certification by the LOC-FOOD participating nations are as follows:



GREECE	
Koulouri Thessalonikis	PGI
Revani from Veria	PGI
Thermaic Gulf Mussels	PGI
Thracian Trachanas	PGI
Bougatsa (SERRES)	PGI
Pork from black pig	PDO
Trigona Panoramatos	PGI
Linseed paste	Organic



ROMANIA	
Gulianca cheese	PDO
Leavened sweet curd	PGI
Moldova-Covurlui stew	PGI
Moldova-Covurlui roast salted pork lard	PGI
Braila island amorphous honey	PDO



MOLDOVA	
Bors cu burecheti	TSG
Rasol de suvai	TSG
Plachie de peste	TSG
Ghitman	TSG
Placinta miresei	TSG



BULGARIA	
Dobrudza beans	PGI
Dobrudza bread	PGI/TSG
Vihren triticosecale bread	PGI/TSG
Lapadnik from General Toshevo	TSG

Other project activities

Marketing Guidelines for Traditional Foods

All project partners have recently completed their marketing guidelines for traditional foods. These booklets contain valuable advice for small-scale producers of traditional foods who want to promote their products more effectively, increase their sales, and broaden their customer base. The guidelines discuss marketing and advertising in both traditional and on-line media, including search engine optimization, so that potential customers can find your business more easily, and the use of social media in marketing. The various sales channels available to small food businesses are also examined. Anybody who wishes to obtain an electronic copy can enquire via the website locfood.eu.

Educational seminars for producers and local officials, Greece

Two seminars were organised in Kavala and Thessaloniki for food producers and local government officials with responsibility for agricultural economy and food policy. Each seminar took place over two days. The general theme of the seminars was marketing and business development with focus on small and family businesses. Presentations were given by members of the LOC-FOOD team at International Hellenic University and by invited speakers. The events were organised and hosted by the lead partner, the Ministry of the Interior, Sector for Macedonia and Thrace.

Presented subjects included marketing guidelines for traditional products, EU certifications, best practices for the promotion of traditional foods in Europe, funding sources for agricultural and food business development, innovation in organic products, waste valorisation, and the contribution of family enterprises to the development of the agri-food sector.



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Organic Farming

Although it still constitutes a small proportion of the total agri-food market, the production and consumption of organic food in Europe has increased considerably in recent years and is likely to continue to do so. The European Green Deal is a long-term strategy by the European Commission to transform the European Union into a competitive, resource efficient economy with minimal environmental impact. Central to this plan is the Farm to Fork Strategy, which aims to make food systems fair, healthy and environmentally friendly. The expansion of organic farming to 25% of the total farmed area by 2030 is a key element of this strategy.

What is organic food production?

Organic food production within the European Union is defined by Regulation (EU) 2018/848. Non member states that trade with the EU follow the same or very similar rules. The opening paragraph of this regulation defines organic food production as “...an overall system of farm management and food production that combines best environmental and climate action practices, a high level of biodiversity, the preservation of natural resources and the application of high animal welfare standards and high production standards...”. In practice this means that chemical inputs for pest control or fertilisation are severely restricted to a list of permitted non-synthetic materials that can be used only as a last resort. Instead, natural and non-polluting means are employed such as crop rotation, compost application, the use of disease-resistant varieties and the employment of pest traps. No genetically-modified plants or animals are allowed.

For a farmer to start selling products as organic, a conversion period of up to three years is required during which the full organic regulations must be followed but the products are not certified. Organic products bearing the official organic logo must have been certified by the appropriate authorities in the country of production and have undergone the required conversion period.

Scale of organic food production

The area of agricultural land dedicated to organic farming or in conversion to organic farming within the EU27 has increased from 9.5 M Ha in 2013 to 14.7 M Ha in 2020, an increase of around 55%. 14.7 M Ha corresponds to 9.1% of the agricultural land of the EU27. However, there is considerable variation in the proportion of land dedicated to organic farming between member states. Leading EU nations in 2020 were Austria (25.7%), Estonia (22.4%), and Sweden (20.3%), while those member states with the smallest proportion of land farmed organically or in conversion were Malta (0.6%), Ireland (1.7%), and Bulgaria (2.3%) [1].

The proportion of organic farm land in the countries in the LOC-FOOD project are given in Table 1.



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Table 1: The proportion of organically-farmed land in the LOC-FOOD participating countries

Country	Agricultural land certified organic or in conversion (% of total)		Year, source
	Hectares × 1000	% of total	
Bulgaria	116	2.3	2020, [1]
Greece	535	10.1	2020, [1]
Moldova	29	1.6	2019, [2,3]
Romania	469	3.6	2020, [1]
Ukraine	462	1.1	2020, [4]

The change since 2013 in proportion of agricultural land that is farmed organically or is in conversion to organic farming in the countries in the LOC-FOOD project is illustrated in Figure 1. Here we can see that organic farming in Greece and Romania has increased since 2016, while in Ukraine the proportion of land farmed organically has remained fairly constant over the reporting period. The effect of the current war in Ukraine on organic farming has yet to be seen. In Bulgaria, organic farming underwent a rapid increase from 2014 to 2016, but has since been in a state of slow decline. There are several reasons for this decline, the main ones being lack of funding, poor management of the available funding, the take-over of small organic farms by larger conventional operations, and the small size of the domestic organic market. The large year-on-year fluctuations recorded in the proportion of organically-farmed land in Moldova are mostly not caused by actual changes in farming practice, but by changes in legislation and enforcement. The regulations for organic certification in Moldova have been in a state of development since 2005, resulting in changes in the status of some farms. In addition, cases of fraud have been uncovered by the authorities that have affected the apparent area under organic farming [3].

The economics of organic farming

The market

In the EU27 in 2020, there were 433581 agrifood businesses active in the organic food sector. Most (349499) were producers, but also included in the total were processors (78262) and importers (5820). The total retail sales of organic food in the EU27 in 2020 were 44.8 billion Euros, an increase of 15.1% on the previous year. France and Germany between them accounted for 62% of this expenditure. In terms of retail value, the organic food market equated to 4.7% of the retail food market across the whole EU27, leading countries being Denmark (12.1%) and Austria (9.3%). The average annual per capita expenditure across the EU27 was 101.8 Euros (Denmark 384 Euros, Luxembourg 284 Euros) [5].

In Moldova, organic foods make up about 0.1% of the approximately 1 bn Euro retail food market. Although this percentage is small, it is growing, fuelled by an expanding middle class and increasing availability of organic products [3]. In 2019 in Ukraine, there were 597 registered organic food businesses, the large majority of which were primary producers. The internal market for organic food in Ukraine was worth an estimated 18.4 million Euro in 2018. The largest sectors were dairy products (73%) and cereals (14%). Lack of trust in domestic organic labelling has been a problem for producers of organic foods in Ukraine and driven many consumers towards imported products, but this situation should be improved by the recent introduction of new national standards and seals [6]. An essential precondition for the development of the organic food market in Ukraine is of course the restoration of peace and security and the regeneration of the country's economy following the devastation caused by the ongoing Russian invasion.

Economic benefit for the producers

Organic products sell for a higher price than conventional ones, which helps to offset any additional production cost and can potentially increase the producer's profits. The price premium on organic foods varies considerably according to the product and the country in which it is sold. Reliable data is limited, but the available information suggests that the markup is commonly in the range 10-60% and can sometimes exceed 100%.

However, there are costs associated with organic production. Yields are lower by 20% on average, although for some crops the difference may be considerably greater. The relative yield from organic farms also varies considerably between areas, as the requirements for fertilization and pest control can differ according to the soil type and local climate. A significant difficulty encountered by farmers wishing to switch to organic production is the statutory conversion period of up to three years. During this period the farmer must apply the regulations for organic farming, with the associated loss of yield, but does not benefit from the price premium as the crops cannot be sold as organic. In order to encourage farmers to convert, supplementary funding is often available to help them through the conversion period. Within the EU, organic farmers qualify automatically for the 'green direct payment' which is given to encourage sustainable land use.

Conclusions

These data reveal that the market for organic produce, while still relatively small, is growing and presents an opportunity for producers to increase their income while reducing their negative impact on the environment. It should be noted that the market for organic foods is growing faster than the land area in Europe that is under organic farming, suggesting that there is little danger of market saturation in the near future. The demand from the domestic market for organic produce varies considerably between countries and could limit the price premium in some cases, but there are also many opportunities in the export market. Although the transition to organic farming can be difficult, there is often support available to help producers get established until they start to benefit from the higher retail value of their organic produce.



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LOC-FOOD on the internet



The LOC-FOOD project has a new website, <https://locfood.eu/>, where lots more information on the project can be found. The website will also host the database and GIS map once these have been completed.

In addition, there is an official Facebook page for the project and separate Facebook pages for most of the partners. These are listed below:

Official project page: <https://www.facebook.com/locfoodofficial>

ONAFIT, Ukraine: <https://www.facebook.com/LOCFOODONAFIT>

UDJ, Romania <https://www.facebook.com/LOC-FOOD-UDJ-Romania-101970308339821>

VUM, Bulgaria <https://www.facebook.com/LocFoodBulgaria/>

ATDM, Moldova <https://www.facebook.com/Loc-Food-project-104479128360052>



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