

The Wine Value Chain in Romania: An Integrated Analysis of the Vitivinicultural Sector

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ARTICLE INFO	ABSTRACT
<p><i>Article history:</i> Accepted June 2025 Available online June 2025</p> <p><i>Keywords:</i> Romanian wine sector, Market positioning, production fragmentation, regulatory framework, competitiveness</p>	<p>Romania benefits from favourable pedoclimatic conditions for viticulture, ranking among the leading wine-producing countries in Central and Eastern Europe. This paper examines the structural, economic, and strategic aspects of the Romanian wine value chain, spanning from grape cultivation and processing to distribution and consumption on both domestic and international markets. In addition to technical and economic aspects, the study examines market dynamics, consumer trends, and the positioning of Romanian wines in the global context. It also highlights the regulatory framework and available funding opportunities under the Common Agricultural Policy, with a focus on support for small producers. Key challenges such as production fragmentation and climate change are outlined, alongside emerging opportunities like wine tourism and the growing demand for organic wines. The paper concludes by emphasizing the need for a coherent, innovation-driven, and sustainable development strategy to enhance Romania's competitiveness in the global wine market.</p>

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1. Introduction

The wine sector in Romania represents a fundamental component of national agriculture, supported by a centuries-old tradition and exceptionally favourable soil and climate conditions. The geographical positioning and soil diversity contribute to a considerable potential for quality wine production, placing Romania among the key players in Central and Eastern Europe. The wine value chain includes a sequence of interdependent activities that contribute to the final value of the product: from raw material production (grapes) to processing, packaging, distribution, and marketing. In Romania, the most important wine regions are: Dealu Mare, Cotnari, Târnave, Drăgășani, Murfatlar, Miniș-Maderat, Receaș, Huși, Odobești, Sâmburești, etc.

Romania has approximately 180,000 hectares of vineyards, of which around 55% are planted with noble grape varieties. Among the most widely cultivated native varieties are Fetească Neagră, Fetească Regală, Fetească Albă, Băbească Neagră, Tămâioasa Românească, Grasa de Cotnari, and Negru de Drăgășani. At the same time, international varieties such as Merlot, Cabernet Sauvignon, Sauvignon Blanc, and Chardonnay are also grown.

Production varies from year to year, being influenced by factors such as climatic conditions, the occurrence of cryptogamic diseases, the level of mechanization, and the implementation of modern

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technologies. Unfortunately, many plantations are small, which negatively affects both yields and economic efficiency.

Winemaking units in Romania range from large industrial wineries to small artisanal producers. There are over 1,200 authorized producers, but a significant share of wine production comes from a small number of large companies.

Winemaking technology has modernized considerably over the past 15 years, thanks to investments supported by the National Rural Development Programme (PNDR) and the Wine Common Market Organisation (OCM) programs (Table 1). Nevertheless, significant quality differences persist, depending on equipment, know-how, and access to financing.

Table 1. Relevant Funding for the Romanian Wine Sector (2020–2024)

Year	Program	Estimated allocation (millions of €)	Observations
2020	National Support Program for the Wine Sector (PNS)	~10	Funds allocated for vineyard restructuring, investments in winemaking units, and promotion of wines on external markets
2021	National Support Program for the Wine Sector (PNS)	~10	Continued support for the modernisation of the wine sector and the expansion of sales markets.
2022	National Support Program for the Wine Sector (PNS)	~10	Allocations for investments in processing infrastructure and promotion of Romanian wines.
2023	National Strategic Plan (NSP) 2023–2027 – Interventions DR-04 and DR-05 for organic farming	389.1	Support for conversion to and maintenance of organic practices, including in viticulture.
2024	National Strategic Plan (NSP) 2023–2027 – Intervention DR-23 for processing and marketing of agricultural products	164.9	Funding for SMEs and large companies in the agri-food sector, including for the processing and promotion of organic wines.

Source: National Rural Development Network (NRDN, 2024) and Rural Investment Financing Agency (AFIR, 2024)

Distribution channels include modern retail, speciality stores, restaurants, trade fairs, and exports. Domestic consumption stands at around 22–24 liters per capita annually, below the EU average. The market is increasingly shifting towards premium wines, DOC/PGI-certified products, and wines with ecological characteristics.

Exports have seen a slight increase, being mainly directed toward markets such as Germany, the United Kingdom, the Netherlands, China, and the United States. However, the image of Romanian wine remains underpromoted compared to regional competitors like Hungary and Bulgaria.

The Romanian wine sector is regulated by a complex legislative framework aligned with European Union standards. National legislation includes the Vine and Wine Law no. 164/2015, along with several secondary regulations that define the conditions for wine production, labelling, certification, and marketing.

At the European level, the main support framework is provided by the Common Agricultural Policy (CAP), through the Common Market Organization (CMO) for wine, which offers tools for third-market promotion, vineyard restructuring, winery modernization investments, and harvest insurance.

Additionally, the National Support Program for the Wine Sector (PNS) allocates annual funding for investment and promotion measures. Between 2019 and 2023, Romania benefited from over €47 million through these programs.

Financial support is available to both large producers and small winegrowers, although the latter face challenges due to administrative requirements and a lack of technical assistance. Cooperation among producers remains low, and winegrower associations do not always manage to provide effective representation and support.

Funding opportunities are also available through the 2023–2027 National Strategic Plan, which includes measures dedicated to organic farming, digitalisation, and the transition to a green economy — all of which are relevant for the wine sector.

This analysis aims to investigate the structural, economic, and strategic characteristics of the Romanian wine sector, using the SWOT research methodology. Through this approach, we will identify strengths, weaknesses, opportunities, and threats specific to the sector, providing an overview of the current state of the supply chain and the strategic directions needed for sustainable and competitive development.

2. Literature review

Studies dedicated to the Romanian wine sector have mainly focused on aspects related to production, wine quality, competitiveness, and rural development. Authors such as Popescu (2017), Ioniță et al. (2019), and Marinescu (2022) have analysed the impact of pedoclimatic conditions on vineyard yields and the adaptability of native grape varieties in the face of climate change. Other works, like those of Dinu (2020) and Rusu (2021), have highlighted the export potential of Romanian wines and the barriers encountered in the internationalization process.

Regarding the value chain approach, the specialized literature addresses its key stages in a fragmented manner, with emphasis on processing and distribution, but pays less attention to the interdependencies among the involved actors. European studies (e.g., Vrontis et al., 2018a; Szolnoki, 2020) propose integrated analytical models that include, besides economic aspects, also the social, cultural, and environmental dimensions of the wine sector.

At the same time, international research highlights the importance of cooperation among producers, regional branding, and the development of wine tourism as a complementary element within the value chain. In Romania, these aspects remain insufficiently explored, despite the growing interest in quality wines certified as organic or with protected geographical indications (PGI/DOC)

This paper aims to complement the existing literature through an integrated approach to the Romanian wine value chain, correlating structural and commercial dimensions with sustainability and strategic development perspectives.

3. Materials and methods

To achieve the proposed objective – the evaluation of the structural, economic, and strategic characteristics of the Romanian wine sector – the SWOT analysis method was employed. This method allows for the identification of the sector's strengths and weaknesses, as well as external opportunities and threats that may influence the development of the wine supply chain.

The analysis is based on a combination of secondary sources, including specialized academic studies (Popescu et al., 2017; Vrontis et al., 2018b; Szolnoki & Hauck, 2020), statistical data published by the National Institute of Statistics, reports from the Ministry of Agriculture and Rural Development, as well as strategic documents within the framework of the Common Agricultural Policy (CAP) and the National Support Program for the Wine Sector.

The SWOT method is frequently used in sectoral analysis because it allows the integration of qualitative and quantitative dimensions within a unified interpretative framework. In this case, it was applied to highlight key aspects that can underpin public policies, commercial strategies, and investment priorities in the Romanian wine sector. For a comprehensive understanding of the current situation of the Romanian wine sector, a detailed SWOT analysis was conducted, integrating recent statistical data and information from specialised literature.

3.1. Strengths

The Romanian wine sector has significant advantages. Romania ranks sixth in Europe and is among the top ten globally, with approximately 187,000 hectares of vineyards in 2024 (CrameRomania.ro, 2024). The diversity of cultivated grape varieties, including native ones such as Fetească Neagră and Tămâioasa Românească, as well as international varieties, ensures a varied and attractive range for export markets (Popescu et al., 2017).

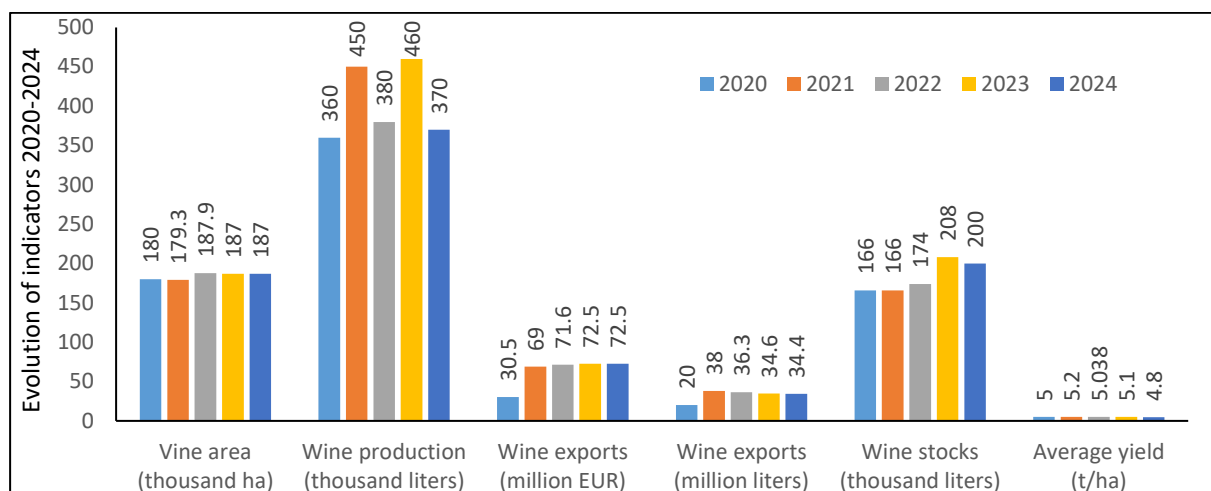


Figure 1. Average Vineyard Yield in Romania (2020–2024)

Source: National Institute of Statistics (NIS, 2025).

Additionally, Romania's winemaking tradition, with a history of over 6,000 years, contributes to the international image and cultural identity of Romanian wine (Vrontis et al., 2018c). Investments from European funds (CAP, PNDR 2019–2023) have led to the modernization of equipment and an increase in the quality of Romanian wines (Blacksea-cbc.net, 2020).

3.2. Weaknesses

In contrast, the sector faces several significant vulnerabilities. Fragmentation of agricultural land is a major impediment: 83% of Romanian vineyards are smaller than 1 hectare, limiting economic efficiency and competitiveness (ECA, 2023). This was the lowest value in the European Union and more than six times smaller than the European average of 1.43 hectares (Eurostat). As of 2020, Romania had 844,015 vineyard holdings, representing 37.9% of all vineyard holdings in the EU. This fragmentation of vineyard properties can affect economic efficiency and the capacity to adapt to climate change and market demands.

Additionally, small producers face significant difficulties in accessing European funds due to complex bureaucratic procedures and a lack of technical assistance (Blacksea-cbc.net, 2020). Another weakness is the insufficient international promotion of Romanian wines, which reduces their presence on foreign markets and affects the global perception of product quality (BASF Agro Romania, 2022). The lack of branding is also a drawback, as Romania is not yet perceived as a global "wine brand," unlike other EU countries such as France and Italy.

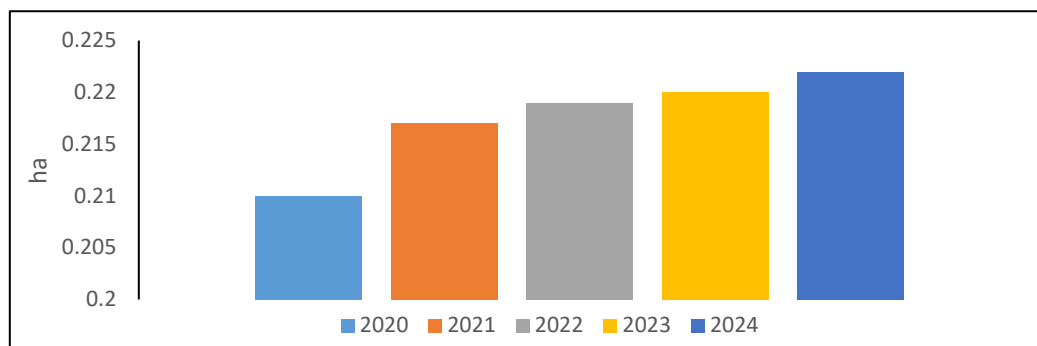


Figure 2. Average Vineyard Holding Size in Romania (2020–2024)

Source: Eurostat – Agriculture database (2024)

3.3. Opportunities

Romania has a very strong natural base, a suitable climate, valuable native grape varieties (Fetească Neagră, Fetească Albă, Tămâioasă Românească), and a millennial winemaking tradition. With such an area, both bulk wine and quality wines can be produced. By 2024, the total vineyard area in Romania will have slightly increased, reaching 187,000 hectares, placing the country 8th worldwide in terms of vineyard surface area.

Current opportunities mainly stem from changing consumer preferences and the context of European policies. There is a growing demand for premium, organic, and geographically indicated wines, creating favourable conditions for the development of specialised Romanian production (Szolnoki & Hauck, 2020).

The development of wine tourism in viticultural regions represents a significant opportunity for local economic growth and international promotion. Moreover, funding from the Common Agricultural Policy (CAP) and the National Strategic Plan (NSP 2023–2027) offers major opportunities for modernisation, digitalisation, and increased sustainability of the sector (MADR, 2023)

3.4 Threats

The Romanian wine sector must manage several relevant external threats. Climate change, manifested through extreme weather events and prolonged drought, has already caused an approximate 20% decrease in national wine production in 2024 (ZF, 2024). Additionally, intensified regional competition from neighbouring countries such as Hungary and Bulgaria, which have implemented more effective marketing and branding strategies, may reduce the international competitiveness of Romanian wines (BASF Agro Romania, 2022). Global economic instability and administrative barriers to export also represent significant risks that could limit the access of Romanian wines to foreign markets.

4. Results and discussions

The SWOT analysis reveals that the Romanian wine sector is at a critical juncture, defined by the tension between its valuable agricultural potential and a series of structural and market constraints. Strengths such as favourable pedoclimatic conditions, the genetic diversity of native grape varieties, and a multi-century tradition provide a solid foundation for the sustainable development of the sector. However, the economic reality of the sector reflects significant imbalances, primarily caused by the excessive fragmentation of vineyard holdings—over 83% of these are smaller than 1 ha (ECA, 2023), which drastically limits scalability and competitiveness.

This highly fragmented structure has multiple negative consequences: difficulties in quality standardisation, low bargaining power within the value chain, and reduced capacity to attract funding or access foreign markets. Additionally, the lack of cooperation among producers and the absence of functional clusters such as D.O.C. (controlled designation of origin) further consolidate the sector's vulnerabilities.

4.1 External Challenges and the Need for Adaptation

Climate change increasingly affects vine phenology, raising the incidence of fungal diseases and reducing production predictability. According to the OIV (2022), vineyard yields vary significantly from year to year, which necessitates urgent investments in irrigation technologies, clonal selection, and climate monitoring systems. Additionally, Romania must integrate good conservation agriculture practices and support the transition to organic viticulture through accessible financial instruments, especially for small producers.

International market competition is intense, particularly from well-established and recognized producers such as France, Italy, and Spain, but also from emerging players like Chile, Argentina, and New Zealand. In this context, differentiation through uniqueness, especially using native grape varieties such as Fetească Neagră, Grasa de Cotnari, or Negru de Drăgășani, can become a strategic advantage, particularly if supported by integrated marketing campaigns and storytelling labels.

4.2 Capitalising on opportunities: wine tourism and organic wine.

Wine tourism is emerging as a promising sector with multiple economic and social impacts. It not only diversifies income sources for small producers but also contributes to strengthening the regional brand and creating thematic wine routes (e.g., the "Wine Road in Dealu Mare," the "Moldovan Wine Route"). European studies (Szolnoki, 2020) show that integrating wine tourism into the value chain significantly increases consumer visibility and loyalty.

Moreover, the growing demand for organic wines and sustainable products represents an opportunity for repositioning Romanian wine. An increasing number of consumers in Western Europe are willing to pay a premium price for certified organic wines, which can compensate for the small size of vineyards if supported by an efficient and digitised distribution network.

4.3 The Need for an Integrated National Strategy

Another critical aspect is the absence of a coherent national branding and promotion strategy. Currently, efforts are fragmented and rely on individual or local initiatives. Instead, there is a need for a coordinated national campaign (like those in Portugal or Greece), supported by the Ministry of Agriculture and interprofessional organisations, to promote Romanian wine under a common, recognisable identity with quality guarantees. Finally, educating domestic consumers plays an essential role. Romania is below the EU average in per capita wine consumption (22–24 litres), and the appetite for premium wines is still limited. Educational campaigns, public tastings, and participation in international fairs can help increase wine culture and foster loyalty in the domestic market.

5. Conclusions

The Romanian wine sector is at a strategic crossroads, marked by a clear contrast between its existing natural and traditional potential and the structural barriers that prevent its full exploitation. An analysis of the value chain and the application of the SWOT method have highlighted both strengths - such as favourable pedoclimatic conditions, the diversity of native grape varieties, and a centuries-old tradition - and systemic weaknesses, including excessive fragmentation of vineyards and difficulties in accessing financing (ECA, 2023; Blacksea-cbc.net, 2020).

At the same time, the identified opportunities—such as the development of wine tourism, increasing demand for organic wines, and the digitalisation of production and marketing processes—provide clear directions for the modernisation and adaptation of the sector. Addressing climate challenges and global competition requires urgent investments in innovation, infrastructure, and professional training (OIV, 2022).

Strengthening a national branding and promotion strategy, supported by a coherent public policy framework and sustainable financial allocations through the CAP and the National Strategic Plan, is essential to enhance the competitiveness of Romanian wine on the international market. It is also imperative that sector stakeholders, authorities, producers, and interprofessional organisations collaborate to reduce fragmentation and develop effective cooperation models.

In conclusion, sustainable and competitive development of the Romanian viticulture sector requires not only financial investments but also a paradigm shift in value chain governance, entrepreneurial culture, and the perception of the value of native wines. Only through an integrated approach based on

innovation, collaboration, and smart promotion can Romania fully capitalize on its competitive advantages in this sector with remarkable agricultural, economic, and cultural potential.

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