

Development of the Organic Food Market in Romania during the COVID-19 Pandemic: a Perspective on the Supply Chain

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Abstract: Organic food is seen as a less harmful alternative to conventional products, both in terms of personal benefits as well as environmental benefits. Therefore, because health became a major concern during the COVID-19 pandemic, green consumption was one of the alternatives through which people tried to take care of their health. Changes also occurred in the organizations involved in the organic food market, these being forced to adapt to the new market context. This paper aims to highlight the most relevant characteristics of the organic food market in Romania, in the context of the Covid pandemic, from the perspective of the supply chain participants. The research method used was the in-depth individual interview, conducted among specialists from organic certified companies. The research was conducted among producers, processors, distributors and retailers, to provide an integrative view on the researched topic. The results showed that the growing interest of consumers in recent years in leaning towards organic food has been accentuated by the Covid-19 pandemic. This trend was intensified by the "democratization" of organic products observed among general retailers, which determined the gap between the prices of organic food and similar conventional alternatives to be smaller. However, the Romanian organic food market is still a niche, characterized by a low level of education among consumers regarding green consumption and by the lack of involvement of institutions empowered in the development of this market. These realities also lead to a small number of organic certified processors, which is reflected in the significantly limited number of locally packaged organic products. Even though the COVID-19 pandemic has provided a significant and unexpected impetus, sustained efforts must still be made by stakeholders to develop this market segment.

Key-Words: organic food market, green products, organic consumption, supply chain, emerging market, COVID-19, pandemic.

JEL Classification: M00, M10, Q00.

1 Introduction

The COVID-19 (Corona Virus disease-2019) global crisis has certainly affected all aspects of the day-to-day life of the population, influenced the eating habits or contributed to the change of lifestyle of a great number of people (Śmiglak-Krajewska & Wojciechowska-Solis, 2021). At the macroeconomic level, the disruption caused by COVID-19 is unique and cannot be compared with other crises in recent years, including the Great Recession of 2008-2009. The high uncertainty regarding the duration, depth and lack of generally accepted economic scenarios determines a need for a robust analysis of the new market context. However, there is a consensus that the impact of COVID-19 is present on both supply and demand (EIT Food, 2020).

The report of M&A Agriculture, Food and Beverage Group's Global Food and Beverage Industry shows that the Covid-19 epidemic had several effects on different areas of the food industry in all regions of the world, Asia-Pacific and Europe being the most affected (Radu, *et al.*, 2021). These developments have changed the "rules of the game". Farmers have come into direct contact with consumers more frequently, retailers have been forced to rapidly improve their online ordering capacity, and consumers to pay more attention to the nutritional value of food (EIT Food, 2020), as well as to the elements or certifications that offer them the guarantee of food safety.

However, despite the strong economic impact of the pandemic, packaged food was one of the least affected industries, with positive growth rates for 2020. Also, although organic products usually have prices which are higher than the conventional ones and the decrease of the world GDP was the highest in decades,

organic food sales increased in 2020. The growth rate of packaged organic food was the highest of all health and wellness categories (Euromonitor International, 2021c).

This evolution is owed to the fact that health has become a major concern during the COVID-19 pandemic (Euromonitor International, 2021c), which was manifested, among other things, by additional care of the population to assimilate healthy eating habits. These changes have created and continue to create opportunities for growth and innovation for companies concerned with providing consumers with more environmentally friendly alternatives. Therefore, producers and retailers of organic products must seize the opportunity to change the mentality of consumers, who have realized, among other things, the importance of supporting local businesses (Cachero-Martínez, 2020; Kantar, 2020).

This paper aims to analyze the context of the Romanian organic food market resulting from the outbreak of the COVID-19 pandemic. Also, by analyzing the perspective of several categories of stakeholders, the paper signals the most relevant current characteristics of this developing market. The analysis of the critical opinions of the interviewed specialists regarding the evolution of the internal organic market helps to define the new market context and offers directions for improvement and development, in order to increase the consumption of organic food locally.

2 Organic food in the context of the COVID-19 pandemic

COVID-19 accelerates some of the key trends that have developed in recent years in the food industry. The shift from treatment to prevention has become increasingly evident as consumers have become more concerned about their health (Euromonitor International, 2021c). Thus, as the COVID-19 pandemic is a health situation, consumers undoubtedly have concerns about food safety and the health of their families (Latip, *et al.*, 2020; Śmiglak-Krajewska & Wojciechowska-Solis, 2021). Therefore, the outbreak of the coronavirus pandemic has forced people to rethink their eating habits, what they eat, where they get their food from and how food is produced, stored and prepared (Bhattacharjee, *et al.*, 2021; Śmiglak-Krajewska & Wojciechowska-Solis, 2021). Organic food is seen as a less harmful alternative to conventional products because they do not contain GMOs and have lower exposure to pesticides and antibiotics. On the other hand, organic certifications serve as a seal of quality, transparency and trust (Euromonitor International, 2021c).

In addition to the absence of substances harmful to human health, organic food is recognized for its high content of nutrients (vitamins, minerals, phytonutrients, micronutrients) (Lairon, 2011; Naspetti & Zanolini, 2009; Sidali, *et al.*, 2016). Voinea, *et. al* (2015) showed that the positive image of organic food is due, among other things, to the additional intake of nutrients with a positive impact on health (proteins, vitamins, minerals, essential fatty acids, fiber). Given these perceptions, consumers, taking into account the recommendations to maintain a strong immune system, to stay away from foods high in preservatives and to eat products rich in antioxidants, were encouraged to look for green products during the pandemic (Başay, 2020; Gumber & Rana, 2021).

Consumers have also become increasingly aware of the dangers that result from a lack of concern regarding the care for the planet. Before the pandemic, there was a perceived increase in collective environmental concerns and sustainability, but COVID-19 further accelerated this process and motivated more people to take on this responsibility (Cachero-Martínez, 2020). According to Euromonitor International's Health and Nutrition survey, 47% of consumers are looking for organic food for environmental reasons. In addition, sustainability involves not only the impact on the environment, but also on the community. Supporting the local economy must become a priority, taking into account the fact that it is more environmentally friendly to buy the products of local farmers than those that require long-distance transport (Euromonitor International, 2021c). Thus, the health crisis may increase the consumption of organic food, made from raw materials grown by organic farming methods and which have not been genetically modified, which have been processed without the use of chemical additives and preservatives (Cachero-Martínez, 2020; Śmiglak-Krajewska & Wojciechowska-Solis, 2021).

On the other hand, consumer savings in travel, food service, entertainment and clothing have provided the opportunity for some of these resources to be allocated to organic food. Some of these savings have allowed consumers to afford higher organic food prices, which have incorporated many of their new priorities, including healthy eating, food safety, sustainability and animal welfare (Euromonitor International, 2021c).

Thus, the growth of organic food in 2020 has been favored by three main factors. First, the focus of consumers on prevention in terms of health and the pursuit of food safety. Second, consumers who care about sustainability and welfare of animals. Lastly, a change in consumer priorities and behavior and a more mature market, with more private labels available and smaller differences between the prices of organic and conventional products (Euromonitor International, 2021c).

Therefore, the COVID-19 crisis has a positive impact on consumers' attitudes towards organic food (Xie, *et al.*, 2020). Statistics confirm that there is a significant increase in awareness regarding organic food, the relationship between nutrition and health and the impact of lifestyle on the environment (Askew, 2020; Bhattacharjee, *et al.*, 2021; Gupta, 2021). The current pandemic situation may strengthen the health motivations behind food purchasing, which can significantly influence the organic food market (Drejerska, *et al.*, 2021). In this way, organic food has experienced a major increase in global demand (Başay, 2020; Kalra, *et al.*, 2021).

According to the Euromonitor International Voice of the Industry survey, almost 45% of professionals in food and beverage companies believe that increased consumption of health and wellness products is a change that will continue post-pandemic (Euromonitor International, 2021c). Thus, it is clear that although COVID-19 has taken many lives, it has nevertheless shown the world the path to healthy living and the value of protecting human health and the environment for us and future generations (Kalra, *et al.*, 2021).

3 The organic food market in Romania during the Covid-19 pandemic

The COVID-19 pandemic has significantly disrupted all sectors of the agri-food industry in Central and Eastern Europe. These disruptions, although having a significant negative impact, also accelerated the trends to which the industry should have adapted. The most important of these trends are the digitalization and change of consumer preferences. However, different actors in the agri-food value chain need to prepare for greater structural changes that will have an impact on the sector, including climate change and stricter environmental regulations. To some extent, the pandemic is a preamble to these changes (EIT Food, 2020).

In Romania, interest in organic products has grown steadily in recent years, both in terms of consumption of organic food as well as in terms of concerns for renewable energy sources. While interest in organic products has a long tradition in developed countries, Romania is still in the market development phase, requiring sustained efforts by stakeholders to achieve more efficient and more adapted marketing to the specifics of the market, but also for educating and attracting consumers to adopt a pro-ecological behavior (Stoica, *et al.*, 2020).

According to the USDA FAS, organic products remain somewhat limited in Romania. The local food processing industry has not been constantly concerned with developing the organic product segment, as the consumer base is still relatively small (EIT Food, 2020). Therefore, many of the large companies in the food industry prefer to postpone the moment of entry into this market segment. Until then, some of them are trying to rethink their current product ranges so that they are perceived by consumers as healthier. Consequently, the number of substances/ingredients considered unsafe, dangerous or even harmful to the human body is reduced and more and more clean products are developed, without flavor enhancers, dyes, preservatives etc.

Cris-Tim launched on the market, several years ago, the "Clean Label" (Porumb, 2021), thus signaling that it makes gluten-free sausages, without starch, without MDM, without soy, without synthetic dyes, without added monosodium glutamate. This is the company's promise that it offers products with the highest meat content, tasty and healthy, masterfully made from clean ingredients of the highest quality (Cris-Tim, 2019). The scandal of citrus peels covered with dangerous pesticides (Thiabendazole, as well as Imazali, or E233) at the end of 2017 (StirileProTV, 2017) led to the appearance on the market of "untreated" citrus fruits or, more precisely "untreated after harvest", but which are not also organic certified. Also, under the slogan "Clean food as in the good old days", Scandia Sibiu offers the promise of clean recipes, without Es or artificial additives (Scandia Food, n.d.).

In times of crisis caused by the Covid-19 pandemic, health has once again become a central theme of the discourse (Porumb, 2021). The pandemic context has led to an acceleration of consumer concerns towards ensuring a balanced diet in order to maintain good health, along with the need for guarantees in terms of food safety. Also, profound changes have taken place regarding the way in which the consumers purchase the desired products. Thus, consumers have chosen to buy more and more frequently from the Internet, from small specialty stores or directly from small local producers, thus avoiding large shopping malls and supermarket chains. However, small producers were not prepared for such a reorientation of consumer preferences. The desire of consumers to have access to deliveries of fresh fruits and vegetables highlighted the current lack of investment in a short supply chain of local fresh food (EIT Food, 2020), but also the lack of collaboration between small manufacturers, so as to meet the demand with a series of optimal solutions.

Marked by Covid-19, but also by the increase of the product category in supermarkets and hypermarkets, the value sales of packaged organic food increased by 16% in 2020, reaching RON 295 million, according to Euromonitor (2021a). The segment of organic dairy products is still the most popular segment of packaged organic foods in Romania. The most important player, FrieslandCampina Romania, was the main contributor to

the growth of organic dairy products in 2016 through its brand Napolact Bio. In May 2020, FrieslandCampina Romania launched an e-commerce store, offering deliveries in the Cluj-Napoca region, where it has its headquarters (Luca, 2020). Other top brands, such as 'Zuzu Lapte Bio' from Albalact SA, 'Covalact de Tara Bio' from Covalact SA and Olympus Bio from 'Fabrica de Lapte Brasov SA' grew in 2020, bringing organic dairy products closer to the mainstream segment (Euromonitor International, 2021a).

Instead, the value of retail sales of organic beverages increased by 12% in 2020, reaching RON 26 million. This increase is mainly determined by private labels, which are perceived to offer a good value for money. The increase was also driven by organic fresh coffee, whose sales volumes remain much higher than organic tea. 100% organic juice remained the most popular organic drink in Romania in 2020, due to its perceived health benefits (Euromonitor International, 2021b).

Regarding the number of registered operators in organic farming, the trend was also upward. If at the end of 2019 there were, according to the Ministry of Agriculture and Regional Development (2021), 9821 registered operators, their number increased to 10210 operators, at the end of 2020.

By 2025, sales of packaged organic food are expected to amount to RON 470 million (Euromonitor International, 2021a), while the estimate for organic beverages is RON 51 million (Euromonitor International, 2021b). Some of the largest increases in current value are expected to come from organic honey and jam, as consumers will be looking more intensely for healthier alternatives to sugar (Euromonitor International, 2021a). Important growth is also expected for private labels in this category, but also for local products, which will penetrate more easily into large retail networks, due to consumer pressure (Euromonitor International, 2021a; 2021b).

4 Research methodology

The purpose of this research is to highlight the most relevant characteristics of the Romanian organic food market, in the context of the COVID-19 crisis, from the perspective of different categories of participants in the supply chain.

The method of gathering information is the in-depth, semi-structured individual interview. The target population consists of Romanian companies that have organic certification granted by an accredited private certification body. The target population includes producers, processors, distributors and retailers. The research was conducted among professionals in management positions.

During the information gathering stage, 25 interviews were conducted (13 producers/processors, 7 distributors and 5 retailers, among which 2 were specialized retailers and 3 were general retailers). The interviews were conducted between November 2020 and February 2021. The transcript of the interviews is available for consultation upon request.

In order to respect the confidentiality of the participating companies, the following coding of the interviews was used: IP - companies producing/processing organic food; ID - organic food distribution companies; R.S - retailers specialized in the sale of organic food; IR.G - general retailers.

Taking into account the nature of the data collected, in the data analysis we will not present statistical reports. The research was based on codes created by the researcher, pursuing the purpose of the research. Finally, the codes obtained were examined for meaning and interpretation.

5 Research results

Generally, the companies' representatives are optimistic about the evolution of the organic food market in Romania, but they agree that many steps still need to be taken before we can talk about a developed and mature organic products market.

5.1 The Romanian organic food market is still a niche market

The organic food market is currently considered a niche market, which is still *„far from what is happening in other countries, that are considered, so to speak, developed countries”* (ID6). This niche market *„is a very little part in the food market, compared to other EU or world countries that have much higher percentages of consumption in organic food markets and much better-developed product categories”* (ID3). Compared to these countries, which *„are already very far away and have hundreds of organic stores, we do not have a single store in the country that has exclusively certified organic products”* (ID2).

However, this is a market *„that has not reached its maximum potential”* (IP11), and sustained efforts are still needed from all actors involved. The need for these steps is seen by one of the specialists as follows: *„The*

fight in this niche is quite fierce, but only together, joining forces, educating, we can grow the market. The more people, the more they all deliver quality, the more people gain trust, they buy without emotions, and bio will be perceived differently. So, yes, we are happy with everyone's efforts, this is the only way we can increase the category” (IR.S1).

5.2 The support of state institutions in the development of the organic food market is considered to be quite low

Most specialists say they are not satisfied with the involvement of state institutions in the development of the organic food market. They say they are dissatisfied with the lack of measures taken to support organic food processors, as well as the lack of information and education for end consumers. One of the specialists states:

„The point is that for organic products, at least in our country, the authorities did not do much. As we encounter all kinds of campaigns on the radio saying 'drink two liters of water', 'eat fruits and vegetables', I did not see a campaign which explains to the population through the mass-media, like in the case of the rest of the campaigns I was talking about, so that people know what the organic product means and how they can differentiate it from a conventional one” (ID2).

5.3 The positive evolution of the organic food market is due to the change in consumer preferences in this direction, especially in the context of the COVID-19 pandemic

As the participants in this research report state, the main change in this market that occurred during the COVID-19 pandemic was among consumer behavior. Experts say that an increasing number of consumers have become aware of food and the possibility of including in their daily shopping cart foods considered healthy, including organic food. Some of the opinions expressed by specialists on this subject are presented in Table 1.

**Table 1: Statements on the evolution of the organic food market
in the context of the COVID-19 pandemic**

Interview	Statement
IR.S1	<i>„The organic market is growing and has grown over the years, it has had a relatively stable growth. It was only in 2020 that it accelerated, somehow due to the pandemic context, which led to a reorientation and re-evaluation of consumers, reorientation towards cleaner, organic products. Consumers have understood that what they eat directly influences their health”</i>
ID4	<i>„It is a dynamic and growing market. Especially since in pandemic days it has been proven that people are more attentive to what they use in their diet”</i>
ID1	<i>„...Regarding organic products sold in Romania, I think things are growing maybe because of the pandemic that imposed the idea of healthy eating, maybe because the big food retailers in Romania have started to have their own brands on the shelves”</i>
IP4	<i>„I think that only now, due to the pandemic, people have started to learn more and understand what bio really means”</i>
IR.G2	<i>„People are more and more concerned about eating healthy. This concern has intensified especially after the pandemic, the concern for their own health... Given the fact that people stayed at home, the fact that there are various viruses spreading and so on, people began to think a little more about their health and try to prevent rather than treat. The easiest and most convenient way for them to do that is to start eating healthier”</i>

Source: author's own study.

However, this increase cannot be entirely attributed to the pandemic context, as a significant number of consumers are frequently reoriented towards the consumption of healthy food, and implicitly, in some cases, towards the consumption of organic food. Therefore, *„people want to eat healthier products, as natural as possible, less processed... [...]... with controlled origin....” (IR.G1).* *„The expansion is due to the increased attention of people for what they eat, a greater awareness that food really matters, and organic products are obviously a healthier alternative, even if not necessarily in all cases” (IR.G3).*

5.4 Lack of education among the general population regarding the consumption of organic food

Most of the interviewed specialists consider that the general public does not understand even at this moment the concept of green/organic product/food, this being often confused with other concepts, such as: “natural product”, “traditional product”, “product cultivated/grown in rural areas”, “artisanal product”, or “hand-made product”. Some experts believe that the public *„did not understand that organic has those three points in the legislation: it is not sprayed, it is not genetically modified and no fertilizers or chemicals are used”*

(IP5). Also, some experts say that the general public does not know how to recognize organic products, therefore does not differentiate them from conventional products („*They do not know that organic products must have that green leaf, the European logo, do not know how to recognize them*”- IP4). Therefore, it is difficult to believe that the majority of the public knows the benefits of organic products, both for individuals as well as for the environment.

5.5 Poor development of local organic processing activity

At this moment, the Romanian market is marked by significant exports of organic raw materials and imports of packaged organic products.

„... Unfortunately, organic production is not very, very developed. We produce raw materials that we export in raw form, in developed countries, where there is a processing infrastructure. They return to us in the form of finished products, at some costs and for slightly higher prices than what the average person in Romania can afford” (ID6).

Related to this topic, an important part of the specialists believe that this situation is due to the fact that the state subsidy is granted only for the agricultural land cultivated in organic agriculture, not for the processing of raw materials in the form of organic finished products. Due to the fact that subsidies are substantial, growers show a lack of interest in capitalizing on organic raw materials locally.

„Bio has become a trend since receiving subsidies... [...] ... People come who do not necessarily believe in this, but do it to receive subsidies and then the quality decreases a lot, because then it remains fixed what is provided in the legislation: non-sprayed, non-genetically modified. And then I can afford to sell a marigold powder that is not highly qualitative, but is organic...” (IP5).

5.6 Democratization of organic products

The entry into the market of large producers in the food industry, as well as the concern of retailers for the development of this category of products (especially through private labels), was also marked by lower prices of these products, especially from these new entrants in this niche market. This action has led to the so-called “democratization of organic products”, as specialists often call it.

One of the specialists finds that „the Romanian market is trying to move towards the German model, in which the products may not have extraordinary quality, respect the organic standards, but are at a price that the population can afford to buy” (ID1). This opinion is also supported by the statement of one of the specialists who represent a general retailer: „Our interest in *** is to democratize bio, to bring as many BIO products at lower prices, accessible to a wider population, to more segments” (IR.G1).

Similarly, one of the specialists explains the whole phenomenon: „when this trend started to take off, indeed the eco products were positioned much higher, they were much more expensive, but the appetite increased, the volumes also increased, and so on. People have started consuming much more eco, somehow you have this opportunity to keep costs lower and this is not our case, but it is everyone's case. But eco is no longer a premium product, becoming a more mainstream one, but as I said, a little more expensive than normal products” (IR.G2).

Therefore, as another representative of a general retailer (IR.G3) points out, this democratization of prices can be achieved either by making the production of organic products a mass production or by increasing the volumes sold (as a result of the practice of lower selling prices compared to the rest of the competition), which automatically leads to the possibility of switching to mass production.

6 Conclusions

In order to provide a realistic basis for the interpretation of the research results, it is essential to present the main limitations of this study. Due to the exploratory nature of the research, the results of this study cannot be generalized to all organic certified companies. However, given the size of the market, we appreciate that this research has included a significant number of specialists, which leads us to believe that the results can be a solid basis for information for the development of future research in this direction. Also, the subjectivity of the researcher, manifested involuntarily, can have a certain degree of influence, in the stage of data collection, analysis and interpretation.

The analysis of the critical opinions expressed by the interviewed specialists helped to define the current situation and the characteristics of the market during COVID-19. There is optimism about the evolution of this market segment, but there are many aspects that need to be improved in order to hope for increased the local consumption of organic food.

The specialists consider that the organic food market is still a niche, but it has registered constant growth every year. The growth rate accelerated against in the pandemic context, which boosted consumers' orientation towards products considered healthier. However, experts believe that the involvement of state institutions is reduced in this direction, signaling the lack of support for the processing of organic finished products under local brands, as well as the lack of education and information actions carried out at the general public level.

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