

Country Profile

ROMANIA

Access to Land · Land Markets · Generational Renewal · Peasant Farming

Prepared by: ALPA & Eco Ruralis

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Sources: Eurostat / Agricultural Census 2020; INSSE; European Commission CAP Strategic Plan Romania; JRC Report on Land Market Regulation (2021); Eco Ruralis Romania Land Fact Sheet 2025; RURALIZATION project

13M ha Utilised Agric. Area (55% of country)	2.89M Farms (2020)	~4.4 ha Average Farm Size	~5M Peasant Farmers
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I. GENERAL AGRICULTURAL CONTEXT

Romania has the most extreme land structure dualism in the European Union: nearly 96% of all farms are smallholdings under 10 ha — yet just 0.5% of farms (large corporate entities) control almost half the country's agricultural area. This paradox — millions of subsistence peasant farmers alongside a small number of agribusiness mega-farms — is the defining feature of Romanian agriculture, and the root cause of most land access problems.

Farm Structure

Farm Size	No. of Farms	% of Farms	Total Area	% of UAA
0-9.9 ha	2,723,090	95.8%	4,004,290 ha	31.3%
10-99.9 ha	102,400	3.6%	2,653,680 ha	20.7%
≥ 100 ha	16,010	0.5%	6,104,850 ha	47.8%
TOTAL	2,841,500	100%	12,762,820 ha	100%

Source: Romanian Agricultural Census 2020 / Eurostat

Average farm size is just 4.4 ha overall, but this headline disguises the dualism: peasant (family) farms average 2-3 ha, while company-owned farms average 208 ha. The total number of farms fell from 3.86 million (2010) to 2.89 million (2020) — a loss of nearly one million farms in one decade. This accelerating structural shift is largely driven by land market liberalisation post-EU accession and CAP subsidy dynamics that reward scale.

Land Use Distribution

Indicator	Value / Description
Total UAA	13 million ha (~55% of national territory)
Arable land	8.3 million ha
Pastures, hay fields & permanent crops	4.8 million ha

Indicator	Value / Description
Family gardens (subsistence plots)	0.2 million ha
Key crops	Cereals (wheat, maize, sunflower) dominate Danubian plain; livestock + dairy in Transylvania and Carpathian foothills
Regional pattern	Largest, highest-value farms concentrated in Danubian and southern plains (Muntenia, Dobrogea); more fragmented holdings in Transylvania, Moldavia, Oltenia

Source: INSSE; Eco Ruralis Romania Land Fact Sheet 2025

Organic & Agroecological Farming

Organic farming covers approximately 4.7% of Romanian UAA (around 613,000 ha) across 14,000 certified organic farms — a modest but growing figure. Permanent grassland dominates the organic area, reflecting the extensive pastoral tradition in upland Romania.

Organic Sector	% of Organic UAA
Grassland (permanent pastures)	~30%
Fodder crops (green harvested / feed)	~18%
Grains (cereals)	~19%
Oil crops (sunflower, rapeseed)	~12%
Horticulture (vegetables, fruits, berries)	~5%
Fallow land	~1%
Other / unclassified	~15%
TOTAL	4.7% of UAA (~613,000 ha); 14,000 farms

Source: Organic Targets EU / agroberichtenbuitenland.nl 2024

Significant open questions remain: the relationship between Romania's millions of peasant farmers and agroecological practice is undertheorised in national policy. Community Supported Agriculture (CSA) initiatives and seed sovereignty networks in Transylvania represent promising grassroots models. The ECVC definition of "peasant agroecology" is directly applicable to Romania's smallholder context — but has no formal recognition in national or EU strategic frameworks.

II. FARM SUCCESSION & GENERATIONAL RENEWAL

Age Profile & Succession

60.4% Farmers over 55 years	7.3% Farmers under 35 years	<25% Intra-family succession rate	14,300 Young farmers supported under RDP 2014-2020
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Romania faces one of the EU's most severe intergenerational crises in farming. With 60.4% of farmers over 55 and only 7.3% under 35, the demographic cliff is acute.

Intra-family succession rates are below 25%, meaning most farm businesses — particularly small-scale peasant holdings — have no identified successor.

When elderly smallholders can find no family heir, local authorities increasingly concession common pastures and unused land to large agribusinesses rather than to younger community members, further accelerating consolidation.

Public Support for New Entrants

- RDP 2014–2020 Sub-measure 6.1 ("Setting-up aid for young farmers"): supported approximately 14,300 young farmer business plan installations via EU-funded direct payments. This is among the largest absolute numbers of beneficiaries in Europe — but given 5 million peasant farmers, the impact remains marginal.
- Law 175/2020 (effective February 2021): grants young farmers (≤ 40 years) pre-emptive purchase rights for agricultural land — a significant formal right, but weakly enforced in practice.
- CAP 2023–2027: 3% of direct payments ring-fenced for young farmer top-ups. Romania's Strategic Plan also provides redistributive income support (+115.9% above national average for smaller farms) and top-ups for disadvantaged area farms (+114.4%).

Despite these tools, the National Strategic Plan 2023–2027 lacks clear measures for land redistribution, land access for youth, or targeted support for subsistence farmers. Training and advisory services for new entrant agroecological farming are essentially absent: an estimated 97% of Romanian farmers learn through informal and practical experience.

III. ACCESS TO LAND

Tenure Structure

Indicator	Value / Description
Owned and farmed by holder	~69% of UAA
Rented (leased) land	~17% of UAA
Common land / shared / other tenure	~14% of UAA
Lease character	Often informal, short-term, and without legal protection for tenants
Common pasture governance	Frequently leased by local authorities to agribusinesses — without transparent procedure or community benefit criteria
Foreign-controlled land	Estimated 7.5% to 40% of UAA (range reflects data uncertainty and ownership opacity)

Source: Eurostat; European Commission; Eco Ruralis / ALPA profile 2025

Land Ownership Concentration

Romania exemplifies the EU's most extreme land use concentration combined with the EU's most numerically dense smallholder population:

- In 2020, just 0.5% of farms (those ≥ 100 ha, mostly companies) controlled 47.8% of all UAA.
- The top 12% of farms (≥ 10 ha) controlled approximately 68.5% of UAA.
- Nearly 96% of farms (under 10 ha) share just 31.3% of UAA among them.

Foreign-controlled agricultural land is a particularly contested issue. Official EU data suggests approximately 7.5% of UAA, but investigative analysis and academic

research estimate the true figure may be as high as 40%, with opacity created by shareholding structures, dormant companies, and informal control arrangements.

Known Largest Landowners (Romania)

- Agrico Group: tens of thousands of hectares — one of the largest agribusiness operations in CEE; concentrated in the Danubian plain.
- Ingleby Agricultura (Danish investor): ~11,000 ha — part of a broader European land acquisition pattern by Danish and Nordic capital.
- DN Agrar: ~7,000 ha — German-linked corporate farm group operating in western Romania.
- Note: comprehensive public data on land ownership is unavailable due to cadastre incompleteness and opacity of corporate structures.

Land Prices & Market Trends

Indicator	Value / Description
Average sale price (2022)	~€8,000/ha (39,704 RON/ha)
Average sale price (2016)	~€1,958/ha — among EU's lowest
Price trend (2016–2022)	~4x increase in 6 years — among fastest rising in EU
Regional premium	Danubian plain (south/east) significantly higher; Transylvania and Moldavia lower
Lease price (approx.)	Below EU average of €173/ha/year; informal contracts often at rates below legal minimum
Main price drivers	CAP area subsidies capitalised into purchase price; speculative investment; corporate consolidation
Access for smallholders	Poor; price inflation, unequal bargaining power, weak pre-emption enforcement

Source: INSSE; Eurostat; farmlandgrab.org; Eco Ruralis Land Fact Sheet 2025

Cadastre Incompleteness: A Structural Barrier

Romania's land administration system is fragmented, partially digitised, and incomplete — creating significant legal insecurity for smallholders. The National Cadastre Program (launched 2015) had registered only approximately 50% of parcels by 2023. Unregistered land creates:

- Conflicts over ownership that cannot be legally resolved
- Delays and uncertainty in land transactions
- Reduced access to credit for smallholders using land as collateral
- Exploitation by corporate buyers who navigate informal systems more effectively

EU-funded cadastre modernisation is ongoing, but progress remains slow. The 2023 cadastre reform regulation (replacing the 2014 framework) aims to simplify registration, digitise procedures, and clarify legal frameworks for land transfers — but implementation is uneven.

IV. LAND MARKET REGULATION

Sale Procedure Under Romanian Law (JRC 2021)

The sale of agricultural land outside built-up areas follows a legally complex, multi-stage procedure designed to protect local and farmer interests — but frequently circumvented in practice:

- Stage 1: Seller submits sale offer to town hall (primărie) for public display for 45 working days — to allow pre-emptive rights holders to act.
- Stage 2: Pre-emptive rights holders in priority order: co-owners → tenants → neighbouring plot owners → young farmers (≤ 40 , resident in Romania ≥ 1 year) → Academy of Agricultural and Forestry Sciences → local/neighbouring commune residents → Romanian state (State Domains Agency).
- Stage 3 (if no pre-emptor): sale must be offered to qualified buyers for a further 30 days — defined as individuals/companies resident and active in Romanian agriculture for ≥ 5 years.
- Stage 4: If no qualified buyer found, sale may proceed to any buyer. Ministerial approval required throughout.

Despite this structure, enforcement is weak. The pre-emption procedure is frequently bypassed through share deals, informal transactions, or procedural manipulation. The JRC (2021) notes that while the framework "prioritises young farmers and existing farms," experts argue it imposes "rather restrictive conditions on some investors" — suggesting the real weakness lies in enforcement capacity, not legal intent.

Key Legislation Timeline

Period	Reform / Event	Impact
1991-2005	Land restitution & fragmentation laws	Millions of small plots returned to families; created extreme smallholder-large farm dualism
2005-2014	Land market liberalisation (EU accession)	Rapid increase in foreign ownership; accelerated corporate land concentration
2020-2021	Law 175/2020 — pre-emption & restrictions	Brief attempt to restrict foreign purchases; later challenged legally and partially softened
2023	Cadastre reform & municipal lease rules	Improved transparency in registration; mandatory public tender for municipal land leases
2023	Solar energy law (Law 21/2023)	Enables PV installations on lower-quality agricultural land (class III-V), up to 50 ha
2025	Fiscal reforms (EO 156/2024)	Mandatory lease contract registration with tax authorities; rental income now taxed gross

Source: JRC 2021; JURIDICE.ro; Eco Ruralis / ALPA profile 2025

Regulatory Gaps

- No SAFER-type land control authority: Romania has no body with active pre-emption powers comparable to France's SAFER or Germany's land settlement organisations. The pre-emptive rights exist in law but require individuals to self-activate within the 45-day window.
- Cadastre incompleteness: the fragmented land register makes verification of ownership and pre-emption eligibility unreliable.
- Share deal loophole: acquisition of agricultural land via corporate shareholding (rather than direct plot purchase) largely escapes the pre-emption and notification requirements.
- Common land governance vacuum: local authorities can concession common pastures to agribusinesses without meaningful community consultation or competitive tendering — though 2023 amendments to Law 151/2021 introduced mandatory public tender requirements.
- No land bank or matching platform: unlike France (SAFER), Germany (Landgesellschaften), or Scotland (Scottish Land Matching Service), Romania has no state-supported land bank. ALPA is developing a civil society land access platform to fill this gap.

V. POLICY & POLITICAL CONTEXT

CAP & Subsidy Distribution

CAP area-based subsidies are the dominant policy mechanism shaping Romania's land market — and are widely identified as a key driver of land concentration. In the EU broadly (2021 data): farms >250 ha represent 1.1% of beneficiaries but receive 22.1% of direct payments; farms ≤5 ha represent 49% of beneficiaries but receive only 5.8% of payments.

In Romania, where over 90% of ~3.5 million farmer beneficiaries manage holdings under 5 ha, the CAP structure is particularly distorting. Large corporate farms are better positioned to navigate compliance requirements, claim eco-scheme payments, and leverage capital-intensive investments. Romania's CAP Strategic Plan 2023–2027 includes:

- Redistributive income support: top-up of ~115.9% above national average for smaller farms.
- Young farmer top-up: 3% of direct payment budget ring-fenced.
- Disadvantaged area support: ~114.4% top-up for eligible zones.

However, Eco Ruralis documents that eco-schemes and agri-environment payments are underused and not tailored to small or diverse producers. "Agroecology" as a concept appears nowhere in Romania's National Strategic Plan 2023–2027.

Key Organisations

Organisation	Type & Position
Eco Ruralis	Peasant union and movement organisation; anti-land grab advocacy; agroecology; smallholder rights; member of ECVC and Nyéléni ECA
ALPA	Association for Land and People Access; land matching, incubator development; A2LN partner; developing civil society land bank function
Pro Agro	Commercial farm union; advocacy for CAP payments and market regulation
LAPAR	Large-scale agricultural union; productivity focus; CAP subsidies
AGROSTAR	Mixed-sector federation; labour rights and land lease protection
Nyéléni Europe & Central Asia	Food sovereignty movement; Eco Ruralis is active member
ECVC (Via Campesina)	European peasant coordination; Eco Ruralis is member; framework for peasant agroecology

VI. KEY BARRIERS & OPPORTUNITIES

Top Barriers to Land Access

- Land concentration and corporate takeover: 0.5% of farms controlling 47.8% of UAA; large agribusinesses — including foreign-controlled entities — have accumulated tens of thousands of hectares, excluding small and medium farmers from viable land access through price inflation and unequal bargaining power.
- Weak land governance and cadastre incompleteness: 50% of parcels unregistered by 2023; fragmented administration creates legal insecurity, enables informal exploitation, and reduces confidence among smallholders seeking to formalise tenure.
- Lack of affordable and secure access for small farmers and new entrants: farmland prices rose ~4× between 2016 and 2022; lease contracts are often informal, short-term, and unprotected; no land bank, farm matching platform, or starter farm programme exists at national level.

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- Absence of agroecology in national strategic frameworks: no funding lines, no institutional recognition, no advisory services for agroecological transition. Small and diverse farms cannot access CAP instruments designed around conventional, scale-intensive operations.
 - Succession crisis and common land erosion: intra-family succession below 25%; common pastures increasingly leased to agribusiness as local authorities respond to lack of successors.

Opportunities for Change

- Agroecological alliances and peasant movements: Eco Ruralis, ALPA, and their networks (A2LN, ECVC, Nyéléni ECA) are building political capacity for land reform advocacy — with growing cross-border solidarity in Central and Eastern Europe.
- CAP leverage: proper implementation of redistributive payments, young farmer top-ups, and eco-schemes — with civil society pressure — could redirect meaningful resources toward smallholder and agroecological farming.
- Land governance modernisation: ongoing cadastre reform (EU-funded) and 2023 amendments introducing mandatory public tendering for municipal land leases provide institutional foundations for fairer land access. Full cadastre registration would be transformative.
- ALPA land bank / matching platform in development: a civil society land access mechanism to connect departing farmers with new entrants — filling the institutional gap left by the absence of any state matching service.
- Municipal land as lever: emerging pilot projects in Cluj, Alba, and Harghita counties are exploring community-benefit leasing of municipal land for young farmers — a model with potential for national replication.

VII. ADVOCACY & ALLIANCE PRIORITIES

Eco Ruralis & ALPA — National Priorities

- Opposition to land concentration and corporate takeover — including foreign and domestic agribusiness; campaign for effective pre-emption rights and land access mechanisms for peasant and small-scale farmers.
- Reform of national land policy — fairer distribution of land, better market regulation, effective enforcement of pre-emption; push for a national land bank and farm incubator programme.
- Inclusion of agroecology in national strategies — formal recognition in Romania's CAP Strategic Plan; dedicated funding lines; advisory services for agroecological transition.
- Improved land governance — transparent cadastre, fair and enforceable lease contracts, protection of traditional and common land rights from agribusiness concession.
- Seed sovereignty and local food systems — support for CSA networks, seed exchange initiatives, and local market access for peasant producers.

Key EU-Level Positions

- CAP structural reform: fundamental redesign away from area-based payments toward support for active agroecological farming — not scale.
- EU land transparency: mandatory reporting on beneficial ownership of agricultural land; closing the share deal loophole across all member states.
- Recognise peasant agroecology: formal institutional recognition of the ECVC definition of peasant agroecology within EU rural development and Green Deal frameworks.
- Eastern European solidarity: building regional alliances across CEE (Bulgaria, Poland, Hungary, Slovakia) to share experiences and form joint positions on land concentration, foreign ownership, and subsistence farmer rights.

VIII. KEY SOURCES

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