



stroming

office for nature and
landscape development



Natural grazing in Maramures

Harvesting of wilderness meat as a driver for conservation of
landscapes and biodiversity

Stroming and Stichting Ark



In collaboration with
wwf-Danube Carpatian Programme Office/
wwf-One Europe More Nature
Commissioned by wwf-Netherlands

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The information and recommendations in this report largely result of a 3 day field visit in the direct surroundings of Baia Mare, Romania. The study was commissioned by wwf-Netherlands and carried out by Stroming, in close collaboration with Stichting Ark. However, a much broader team was involved. Local contacts were established by Edit Pop, wwf project coordinator for the One Europe More Nature programme in Romania. She, as well as Raluca Barbu, wwf Agriculture and Rural Development Policy Officer in Romania, also accompanied us during our field visit and discussions with local officials, land owners and – users. The lively discussions during our meetings and walks, certainly contributed to this report.

Charlie Avis, wwf project leader for One Europe More Nature provided valuable comments and our first results were also shared with Alterra Institute in Wageningen.

1 Introduction

‘Travel no further. You’ve found what you were looking for. A place where rural medieval life remains intact. Where peasants live off the land as their parents did, and generations before them. Where tiny villages, steeped in local customs and history, sit among rolling hills and dreamy landscapes. Imagine going back 100 years – welcome tot Maramures.’

This is how the Lonely Planet guide (2004) introduces Maramures. And yes, it is a fantastic place. But how long will this beauty continue to exist? The landscape admired so much by travellers is dependent on agricultural use which is hard work for the farmers involved. The economic reality is that many of them can hardly make ends meet. With the EU accession of Romania (foreseen in 2007) this will become even more difficult because the farmers of Maramures will not be able to meet EU standards on e.g. hygiene and animal welfare so that they can no longer sell their produce on the market.

Without new types of income and new types of businesses being developed, agricultural life in Maramures will soon grind to a halt resulting in drastic changes of the landscape and the social life and biodiversity associated with it. A new economy needs to be developed as soon as possible to help prevent this. Pillars of this new economy can be:

- natural grazing and harvesting of wilderness meat;
- tourism;
- water storage and erosion control.

In fact the *economic* benefits of natural grazing can be harvested in two ways: directly through meat production, and indirectly through tourism and – in the long run possibly – water storage fees. In economic terms, tourism is the most interesting of the three. However, tourism (among other things) requires a self-sufficient system of natural grazing as a ‘supplier’ of the landscape and biodiversity needed to attract tourists. Therefore the document concentrates on the baseline activity: natural grazing and meat harvesting. Purpose is to explore whether extensive grazing, connected with the production and sales of ‘wilderness meat’ can help maintain landscape quality, biodiversity in the mountains and social life in the villages. In other words: is it a realistic, economically viable alternative for the current use of mountain pastures and forest fringes? And if so, are there possibilities for pilot projects in which this idea can be elaborated in cooperation with the communities of Maramures? Despite its focus on grazing, the proposal also highlights possible links with the other two economic pillars: tourism and water storage/erosion control.

2 Some characteristics of the study area

2.1 LOCATION

The Oaş-Gutâi Plateau is in the Northwest Carpathians in Romania, on the edge of Transylvania near the Ukrainian and Hungarian borders.

The entire plateau, covering a surface of 147 000 ha, is a remarkable place for nature and is also rich in history, cultural heritage, and scenic landscapes. The mountain is of volcanic origin and noted for its open parkland landscape with a mix of forests, grasslands, and wetlands. The area is vital for people living in the 26 localities placed around the plateau.



Maramures is situated in Romania, close to the borders of Hungary and Ukraine.



Mountain roads act as drains, thus causing local erosion and disturbance of the hydrology of the area.

The region is one of the few locations remaining in Europe which truly provides a sanctuary for rare and endangered animals such as golden eagle, ermine, otter, wolf, brown bear, lynx, wild cat and Carpathian newt. The plateau also hosts over 1000 plant species characteristic for peat bogs, (e.g. sundew, waterwheel – carnivorous plants), high biodiversity forests (with grey, white and green alder, larch, oak, beech, mountain pine, and Norway spruce). Natural forests represent more than 95% of all forests, with beech (70%) and oak (8.2%) dominating. Almost half of the plateau (71 000 ha) is covered with pastures and meadows. Most of these (87%) are privately owned (farmers and communal property); 13% is state property.

The region offers an outstanding mixture of natural and cultural landscape values. Local people are truly proud of their cultural and natural heritage. The region's landscape reputation is known far beyond its boundaries. An increasing number of tourists (Rumanians and foreigners) visits the Maramures area providing a growing source of local income.

2.2 LAND USE

The valleys in the vicinity of villages are mainly used for small scale agriculture (e.g. potatoes, vegetables). Travelling further, but still in the valley and the lower slopes, we enter into a zone primarily used for hay production. The next zone, at even greater distance to the village and at a higher altitude, is used for grazing (sheep, cows, water buffalo, horses). Some of the meadows at these altitude are partly boggy. Forests can be found here as well.

2.3 HYDROLOGY AND WATER MANAGEMENT

The hydrology on the plateau is largely intact. A large dam is under construction but because of its location will not directly affect the hydrology in the possible pilot sites



The two pilot sites are located in the north-eastern part of the plateau (red circles). Travelling from Baia Mare it takes 2-3 hours to reach them by car (4WD).

visited (see further). Of a completely different order of magnitude: a consequence of hay (and timber) production on higher altitudes is that mountain ‘roads’ are needed to transport timber and hay down to the valleys. These roads act as drains, through which ground water is quickly transported to the rivers. Although the number of roads in the area is limited and the negative impact on the hydrology will probably be small, locally these deep gullies do negatively affect the hydrology of the area.

2.4 THE PILOT SITES

On the Maramureș plateau there are a number of possible locations to start with natural grazing and meat harvesting. This report looks at two of them: one in the municipality of Giulesti and one in the municipality of Ocna Sugatag. They were selected primarily because of their vegetation (grasslands) and because of the fact that the local communities (municipality, church, individual farmers) owning or using these lands are keen to participate in a pilot.

3 Natural Grazing

3.1 CHARACTERISTICS OF NATURAL GRAZING

Natural grazing implies the following:

- free ranging herds. The animals decide where they go and are not guided by shepherds;
- natural social structure and sex ratio in the herd (50% males, 50% females);
- natural births, so without human help;
- no additional food provided, not even during winter. The animals manage themselves, year round.

Experience shows that herds living under these conditions are best adapted to survive even difficult circumstances. Only the best bulls get offspring, older animals gradually share their knowledge with younger animals, and a social herd is quite effective in defending younger animals against predators.

3.2 WHY IS NATURAL GRAZING INTERESTING?

Natural grazing is interesting because of the following reasons:

- **BIODIVERSITY.** Natural grazing is one of the ecological key processes (like erosion, or flooding) which create landscapes. Especially large herbivores play an important role in this respect: elk, deer, wild horses, wild boar, bison, aurochs. Each of these animals has its own ecological niche and together they create a varied landscape with forests and open patches. This type of landscape provides habitats for a wide range of plants and animals.
- **MEAT HARVESTING.** Natural grazing allows for harvesting of wilderness meat (imitating the natural losses by predation). In this way natural grazing can provide revenue for local communities, and can be viewed as a 'low input / low output' form of meat production.
- **TOURISM.** The landscapes resulting from natural grazing, the special plants and animals associated with them (e.g. bear, wolves, vultures feeding on carcasses of dead animals) and the free ranging natural herds (with interesting social behaviour) are interesting for *tourism*. This 'indirect revenue' may offer even greater (financial) opportunities than meat production itself.
- **WATER STORAGE.** When hay production on higher altitudes is substituted by extensive grazing, the need for roads (acting as drains) on these altitudes decreases. This would contribute (albeit on a local scale) to water storage higher in the mountains.

3.3 NATURAL GRAZING IN MARAMURES

Given the present situation in Maramures (forestry, cultivated fields, pastures where traditional herding is diminishing) natural grazing should gradually be introduced. And the best way to start is with semi-wild cattle. The original wild European cattle, aurochs, has gone extinct, so a cattle breed has to be selected which is best adapted to the area.

The Maramures Brown (Bruna de Maramures) seems to be the best choice: it is adapted to live in mountainous conditions (few diseases and casualties) and can give birth without human help. It is also well accepted by the local communities, which are in fact proud of these animals. Before communist times the Brunas were even used in a system quite similar to what is called 'natural grazing' in this proposal, including a 50/50 sex ratio.

Animals could be supplied by the existing breeding programme for Bruna coordinated by the Association 'Bruna Schwyz', based in Sighetu Marmatiei.

Despite the fact that the Mara Brown are quite hardy, in Maramures not all conditions for natural grazing can be met, at least not in the pilot sites visited:

- due to the relatively high altitude (850-900 meters) the areas are covered with 1.5-2 meters of snow for several months. In ancient times there must have been a seasonal migration from these higher grounds to lower altitudes, e.g. the plains and Tisza valley in Hungary, which still provide enough food during winter. Such low altitude 'refuges' are several 100's of kilometres away from the sites visited so it will be impossible to allow animals to undertake this journey. There are a number of alternatives. A first possibility would be a 'transhumance', a guided tour over large distances to bring the animals to suitable winter feeding areas. This would be our preferred solution, but given the distances it seems difficult to achieve this in the short term. The second solution is to provide the animals with a large stable in the valley and sufficient hay to survive the winter time. Here the animals might live as a herd like they will on the pastures. Large empty stables are available in the region (from communist times) but it is more attractive (also marketing and communications wise) to build a new stable with respect for local techniques and tradition. Shelter establishment is justified by the low temperatures (- 20 to - 25 degrees Celsius) occurring during the winter, often for more than 2 weeks. The third option would be to move the herd to the village, split the herd in small numbers and divide the animals over a large number of small private stables. This would however upset the natural social structure of the herds. Also the availability of private stables would be a question mark, considering that each farmer has 2-4 of heads of cattle privately and the stables in the village are built to satisfy just the family needs.
- the areas visited are still used for sheep herding, cattle grazing and grazing with horses. Without measures being taken the natural herds would interfere. Therefore a pilot should either be fenced or the natural herd must be guarded by a herdsman, who would not guide the animals but merely ensure that no conflicts arise with other land-users (e.g. sheep farmers or forestry). Our recommendation is to work with 'guardsmen' instead of fences.

3.4 STARTING POPULATION

Experience shows that the best way to start with natural grazing in an area is to bring in an existing natural herd from elsewhere. In Maramures this will not be possible because such a group does not exist. Our recommendation is to start as follows:

- introduction of a group with 'natural' age distribution: 75% between 1-5 years, 25% over 5 years
- sex ratio of preferably 50% bulls, 50% cows as in natural situations. If necessary meat production may temporarily be stimulated by changing the sex ratio in favour of female animals. This would however compete with the biodiversity and tourism aspects of the project which are the main stimulus for the 50/50 sex ratio;
- size of the group depending on carrying capacity of the area; 1 – 1.25 animals per hectare seems to be a good starting point
- group is free moving but guardsmen with guard dogs (no fences) need to keep animals away from neighbouring grounds which do not participate in the pilot. Closed forests are off limits (legally), but forest fringes should be open to grazing/shelter against bad weather or sun.

3.5 INTERFERENCE WITH PREDATORS

A free moving herd should have a natural relationship with predators. A social group is well able to defend itself against wolves/bears. To avoid drastic losses of animals caused by the 30 bears living on the plateau, use of the guard dogs is recommended (low costs, high effectiveness) From an agricultural point of view losses due to predation are traditionally considered to be negative. However, tourism and biodiversity also benefit from natural grazing and as such the interaction with predators can be positive. When an animal dies of old age or a disease, the carcass should not be buried (as is done currently by farmers) but be left in the field as food for scavengers and carnivores. On the basis of information provided it seems there are no legal problems in doing this.

3.6 INTERFERENCE WITH OTHER HERDS

The pilots are located in areas which are still used for grazing. Competition with horses will not be a problem because of different feeding habits, but competition with sheep needs special attention. Currently sheep herders go into high altitudes as soon as possible, thus taking away the first, nutrient rich plants/grasses. High numbers of sheep will decrease the carrying capacity for cows. A tailor-made solution should be developed for each pilot site involved.

4 Wilderness meat

4.1 PHILOSOPHY

Natural grazing, among other things (see 3.2), provides the opportunity to harvest meat of high quality against limited cost. 'Wilderness meat' in itself should ideally contribute to the conservation of its 'source' in the following ways:

- the product should act as a communications vehicle for conservation ('if you buy wilderness meat, you contribute to the conservation of this wonderful landscape');
- the killing of the animals should 'imitate' natural predation, so that age distribution and the number of animals in the area remain in line with those under natural conditions. In this way harvesting helps maintain landscape quality, the ecological process of grazing and biodiversity, as well as the social structure of the herds;
- part of the revenue can be ploughed back into conservation.

The third point will only be possible over time, but the first and second are certainly possible in Maramures. Baia Mare, with its 150 000 inhabitants, could be a good starting point for developing and marketing natural grazing.

4.2 CONSEQUENCES

Respect for nature and animals is important, both from an ethical as well as a marketing point of view. This implies that animals should be killed causing a minimum of pain and stress as well as a minimum of disturbance to the herd. The best way to ensure this would be to have a professional hunter shoot the animals in the wild. However, this is not allowed – at least not when the aim is to bring the meat on the market. The alternative is to bring the animal to a slaughterhouse. With EU accession in mind this slaughterhouse should preferably fulfil the EU criteria on hygiene etc.

The best moment to kill the animals is in autumn when they are moved from the mountains to the stable:

- no extra disturbance because animals are brought together anyway;
- at the end of the 'summer' animals have less fat and so meat quality is better.

Also important is the philosophy that the age distribution of the animals killed, should be similar to the group which would fall victim to predation under natural conditions (many in age group up to 2 years, fewer in age group 2-5 years, no killing after year 5 – these animals normally live until they reach a natural death).

4.3 VETERINARY CARE AND GENETIC MANAGEMENT

In order to be able to sell wilderness meat on the market, the animals in the herd need to receive proper veterinary care. Ideally, EU standards should be met right from the start. This implies annual blood sampling as health monitoring.

In order to ensure a healthy herd, the starting population should be selected carefully. Also careful genetic management is necessary. The best start is probably to have experts from Stichting Ark (experts on natural grazing and wilderness meat production) cooperate with the Association Bruna Schwyz (experts on the Bruna) to jointly select animals for the starting population. Later they should also jointly determine the criteria for the selection of which animals to slaughter as well as the most efficient form of genetic management.

4.4 BRANDING AND MARKETING

The special qualities of wilderness meat can in principle result in higher revenues than those made for normal meat. However, in order to get these higher prices, it must be possible to distinguish wilderness meat from other products. This requires:

- a transparent and controlled chain of custody, so that wilderness meat does not mix with other meat
- a brand or logo and related special marketing efforts.

It will take time before a logo will be officially registered by the Romanian authorities. It is therefore recommended to develop a logo which can be used on a voluntary basis, anticipating the official certification by the authorities.

Income can especially be improved when distribution and sales of the wilderness meat are organised and managed by the project team itself.

When marketed professionally, it is to be expected that tourists will be a good market for this type of meat. When visiting the area many will want to eat the local specialty. If products can be produced which can be taken back home (e.g. sausages in an airtight wrap, such as dried reindeer meat in Sweden) an even more lucrative market can be build up. By cutting out middle men and selling the products directly to customers higher profits can be made.

It is best not to market the wilderness meat in isolation but instead as part of the Maramures-story. Maramures could for example stand for naturalness, 'honest' food, easy life, friendly people, etc. The Mara Brown could become the symbol, just as the wolf is the binding animal for Abbruzzo in Italy. Other elements of a marketing package could include a Mara Brown museum, Mara Brown hikes, Mara Brown products such as postcards, wooden handicrafts, leather products, cut horn, etc.

5 Pilot Ocna Sugatag

The municipality of Ocna Sugatag is highly motivated to participate in a pilot on natural grazing. The council is unanimous in its support. The municipality itself owns close to 500 hectares in the Gutin Mountain. Some 7 herds with a total of approximately 2500 animals (sheep, cows, horses) graze these lands. These animals are owned by 70 out of the 5000 people living in Ocna Sugatag (1.4%). Local landowners and the church also have areas in their possession.

The areas are mainly covered with grass; the altitude is some 850 meters above sea level. Our estimate is that a density of 1 animal on 1-1.25 hectares would be a suitable starting point for natural cattle grazing in this area.

During our field visit the church offered 30 hectares and the two local landowners each offered 3-4 hectares. Although natural grazing could in principle start on these 36-38 hectares, an area of that size is too small for a natural herd and certainly too small for economically viable meat harvesting. It is therefore recommended that around half of the municipality's lands is added to these private lands, so that the pilot could start on an area of 250 – 300 hectares. Because the lands managed by the Local Council are still used (sheep, horses, cows) this would imply that arrangements need to be made in order to 'separate' the pilot from the use currently taking place. Our impression is that land owners and the local council would be willing and able to sit together and come to an arrangement which would indeed free up some 250 - 300 hectares for a pilot.



Location of the pilot sites (red circles) in the municipality of Ocna Sugatag and Giuleste.

The orange dots on the map are nature reserves.



The grazing area in the municipality of Ocna Sugatag. Lands in the foreground (more or less the area in the shade) is owned and managed by the council, the parts higher up (sunny

parts) are privately owned. On the other side of the ridge the descent to the villages starts. Lands on that slope are also privately owned.

5.1 SEASON AND CARRYING CAPACITY

Because of the high altitude the area proposed for a pilot is covered with 1.5-2 meters of snow for several months. Temperatures in winter vary between minus 4 – minus 10 degrees Celsius. The grazing season starts in May (first vegetation growth) and ends in September (poor weather conditions). This would mean that the animals would have to be kept in a stable and fed with hay during 8 months (October – May). Experience from elsewhere shows that the grazing season can probably be lengthened with a few months because in an agricultural production system farmers usually bring their animals down once they start losing weight (combination of rainy and windy autumn weather and lack of food due to overgrazing in the summer months). Under conditions of natural grazing, however, it is not necessary to move the cattle already in September. The animals can find shelter in the fringes of the woods, while enough herbaceous vegetation is still available as food on the pastures. Losing some weight is natural in free living animals and as long as the animals stay in a good condition they need no special care.

However, because of the climate it is probably impossible for the animals to survive at this altitude year round. Therefore we recommend to build a large stable in the valley, in which the entire herd can stay together during the severe winter months. Hay to feed the animals should be provided by the participants in the pilot project. This would be in fact a perfect way for them to invest in the project. Within the region there apparently are a few abandoned, large stables available, stemming from communist times. However, we recommend that a new stable is built, with local techniques and materials.

Our recommendation would be to start a project here with a herd of 225 animals on 250-300 hectares.



Tradition fencing can be used as 'walls' for a large stable, in which the entire herd can

survive the most severe winter months

6 Pilot Giuleste

The pilot area suggested in the municipality of Giulesti is situated somewhat higher than that in Ocna Sugatag: 900 - 1170 meters. The location of the area is indicated on page 13. It is 365 hectares, all of it owned by the municipality. We were assured that it would be easy to expand this area. Some 100 hectares, owned by the neighbouring commune but rented by people from Giuleste, could be added and other areas would be available as well.

The area offered for the pilot consists of secondary grasslands, resulting from human interventions a long time ago. Clear cutting of forests continued until some 50 years ago – remnants of the railway used for timber transport are still witness to this. Forests are found in the area, especially on higher altitudes, and the depressions in the landscape are characterised by small peatbogs. A specialty is the occurrence of ‘dwarf pines’?

6.1 SEASON AND CARRYING CAPACITY

The grazing season at this altitude is largely the same as described for the pilot site of Ocna Sugatag. Also here participants to the pilot could invest by bringing in hay for the winter time.

Our recommendation would be to start a project with a herd of 150 animals on 365 hectares. Food conditions here are not as profitable as on the pilot site of Ocna Sugatag, hence the lower suggested density.



TOP The possible pilot area in Giuleste. Limited grazing takes place but only with horses (right hand side of the photo) and sheep. The entire area visible on the picture (and more) has been suggested by the municipality as an area for natural grazing and meat harvesting.

RIGHT The lower parts of the area are wet and peaty (natural sponges).



7 Organisation and finance

7.1 START WITH AN ASSOCIATION

Our recommendation is to set up one association for each of the pilot sites. The association would be the owner of the new herd. Farmers might participate in the association. Apart from this every farmer will, at least in the short term, continue to keep some private cows near his house for personal use (milk/meat). The new herd is additional.

The members of the association participate (invest) in the project by bringing in:

- hay for the wintertime and/or
- free use of the land (without changes of ownership!) The local council incomes from renting the grazing fields in this moment are 1180 €/year.

On top of this each participant of course also brings in local knowledge, contacts and skills. The revenue from the project (see later) will be distributed among the different participants, each receiving a share. This requires that a key should be developed which translates investments in land and hay in 'investment units' in a fair way.

It is recommended that only participants with a real stake in the pilot (= the local people investing with land or hay) participate formally in the association.

The great advantage of an association is that risks are spread over various members, marketing can be organised jointly and the quantity of meat harvested (and the continuity of supply) offers a better bargaining position with the slaughterhouse.

Starting an association in Romania costs around 10 million LEI (euro 300,=)

7.2 FINANCE

We recommend that each pilot be given 5 years to establish itself and become self-sufficient in economic terms. In our calculations we worked with figures provided by the various people we met. These figures refer to **CURRENT MEAT** prices (live animals) under **CURRENT SUPPLY CONDITIONS** (small quantities, irregular supply). This is realistic in so far that it represents situation in which the pilot would start (there is no wildernis logo yet, no controlled chain of custody, no special market etc.) For the longer term, when the special qualities of the meat can be translated in higher revenues, the outcome of this calculation is probably on the conservative side.

A 'back of the envelope' calculation shows that a herd of 100 animals must be able to reach a break even point. We recommend to start with a herd of 225 animals or even 2 herds (2 pilots, see below).

Breaking even may in itself not be enough to ensure continued participation of the people involved but extra revenue (profits) can be generated from either the meat or from indirect sources like tourism. We are convinced that in the end the second offers the best possibilities, certainly in Maramures with its rich cultural heritage (in fact tourists are already discovering the area). In order for the association to not just provide the landscape that brings tourists, but to also benefit from this, it should over time also explore other possible sources of income. The basis for such an exploration is that the association owns the cattle. The cattle does not only provide meat, but horns and leather can be made into souvenirs. Parallel different types of accommodation and tourist programmes should be stimulated (visit to the herds and the guardsmen; helping the guardsmen; biodiversity-tours, etc)

Within the framework of this feasibility study we did not go further into this so we limit ourselves to some last points on the economic possibilities for meat harvesting itself.

7.3 ECONOMIC PERSPECTIVE

The price for beef in the shops in and around Baia Mare is 4 times higher than that paid to farmers for live animals. This, according to the agricultural institute LEI, Netherlands (verbal communications) is a big difference and certainly offers opportunities to get a better price for farmers. On top of that the special quality of 'wilderness meat' could create extra revenue. Direct sales for part of the meat (e.g. to hotels and restaurants) could generate even better prices. And on top of that comes of course the economy of scale – hence our recommendation to start with at least 225 animals and hence our recommendation for an association.

Crucial is that an entrepreneurial project developer/project leader (a 'quarter maker') is employed to further develop the project, both the natural grazing part (with tourism aspects as well) as well as the meat harvesting/marketing. This quarter maker should at least in the beginning receive technical support from 'the West', given the lack of experience in Romania with this type of business.

We feel that with an investment of 400 000 Euro spread over 5 years a pilot with a herd of 225 animals could start and become self sufficient as of year 6. Annual direct profit against the current price levels (so without the added extra's from special deals, certificates etc.) would be around 10 000-15 000 Euro annually.

Since one 'quarter maker' could cover more pilots and also costs for technical support would stay almost the same, the initial cost for starting two pilots is only slightly higher (some 475 000 Euro for 2 projects, spread over 5 years). These investments would include 'generating' a herd of 225 (resp. 450) animals with which subsequent projects could be started elsewhere after the first 5 years.

7.4 POSSIBLY CONTINUE WITH A LTD.

As soon as participants feel confident that their project is making a sustainable profit, the pilot could be continued in a more business oriented, legal organisation (an Ltd). This would free up the association's energy and funds to start new pilots in other places. The association could attract external funding to be able to continue its

work and/or be funded with part of the revenue of the meat. The ecological quality of the harvesting scheme should be checked by the association on the basis of criteria developed during the first 5 years. Fulfilling these criteria would be required to benefit from the 'special quality' branding and associated marketing and price levels.

There is no need to decide on this now. The first 5 years of the pilot should be used to investigate this further.

7.5 PARTNERS

Currently none of the NGOs in/around Baia Mare are active in the pilot areas but they could be involved (not as participants in the association) to e.g. create awareness, build capacity, set up marketing efforts etc. Contacts could be established with

- Geommed (Nistru region)
- Ecologic (Gutai Mountains, amongst others)
- Societata Ecologista (Hoteru and Tisza)

Other partners are the municipalities involved and the churches, who not only own land but also are highly regarded for their integrity.

We recommend to also include the Association Bruna Schwyz as a partner: they are eager to participate and could not only supply the animals but also share experiences and possibly play a role in genetic management of the herds.

Avalon has shown an interest in the project – a possible role for them could be further explored.

Stichting Ark (Netherlands) would be an interesting partner because it has a long standing record with the type of project/approach recommended, in the Netherlands, Latvia and Bulgaria.

The Ministry of Agriculture should be invited to play a role in the development of a certificate for 'wilderness meat from Maramures'. The director of Agriculture and Rural Development Directorate of Maramures County has indicated that he is more than willing to play a role in this.

Annex

‘GREEN BEEF’ MARKET SURVEY IN MARAMURES

During the month of August 2005, an initial market survey was conducted by WWF with the scope to identify a potential interest from all the parts involved in producing and commercializing a high quality meat, produced according to the qualitative organic standards, as a local brand, attractive for the consumers interested in local products which will contribute also to the local eco-tourism.

The results of this survey will be used exclusively for the WWF initiative within the OEFMN project, to encourage the necessary activities to obtain this brand and in the view of conserving the nature and providing some viable alternatives for the inhabitants of this agricultural area. Given the limited time and resources allowed for the survey, the questionnaire was very simplified.

Managers and directors from 10 restaurants and 4 supermarkets (7 in Baia Mare and 7 in other towns and tourist resorts of Maramures) 1 slaughterhouse (Baia Mare) and 15 clients were interviewed directly or over the phone.

The conclusion of this preliminary survey was that there is definitely an interest for ‘green beef’ and for this concept, especially as a brand of the local area. It should be taken into account though, that this will not be a product for all the consumers but rather for a segment of population that is aware of its qualities and affords to pay a higher price. Such a segment of population exists among both the Romanian and foreigner consumers (especially in restaurants) in the region.

The majority of all the directors/managers of the restaurants and public alimentations (meat) distribution points/shops thought that people might buy it only if the products are certified so that people can trust them and accept to pay more for them. 90% of the sellers in shops and customers interviewed think that people ‘would buy if they could afford’, meaning that the price should not be much higher than the one they were used to, (less than double compared with the normal meat) and 40% of them suggested publicity as a key element in promoting the ‘clean’ quality and the brand.

Directors of 3 different restaurants think that the green beef supply should have continuity in order to be introduced in the menu. They also thought that it would be of high interest especially if fresh meat would be available on a continuous base, not refrigerated. The chain from production to restaurant needs to be transparent and well co-ordinated to include security in the slaughter house and in distribution time.

The managers of the restaurants, 60% of the cases, thought of the foreign clients as first potential buyers/interested persons in these products, but not the only ones.

There is a slaughter house in Baia Mare which is able/prepared to process ecological meat and to have some local brand products such as sausages and smoked meat.

Some people were sceptical about the success of the farmers associations, as they consider the farmers and the state/Romanian situation not ready/favorable for such projects.

The main problems related to the commerce with ecological products seem to be:

- 1 publicity is not enough
- 2 ecological products are expensive
- 3 there is no organized market for promoting/selling these products.

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