



Camera de Comerț și Industrie  
a Republicii Moldova

*translation*

## **ANALYSIS**

**of the results of the national level survey of the groups target that carries out activities in the sector of growth, production, promotion and sale the herbaceous plants (medicinal, aromatic, seasoning) and valuable plant products added commercial related to the creation of Herb Cluster within the HEGO Project**

Chisinau, September 2022

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## 1. CONTEXT

The Chamber of Commerce and Industry of the Republic of Moldova (CCI of the Republic of Moldova) carried out the Research Survey of the sector of growth, production and promotion of herbaceous plants and plant products in the Republic of Moldova, which aims to develop the concept and set of tools for the creation of a Cluster in the sector of herbaceous plants (medicinal, aromatic, seasoning) and plant products with added commercial value.

The general objective of the consultation activity of the target groups involves the accumulation of information about: the competences, needs and expectations of the actors in the field, as well as the opportunities for the development of the Cluster.

The results of the survey will be presented at a meeting during September, about which we will inform you further.

The CCI of the Republic of Moldova carries out this activity in partnership with the Organization for the Development of Entrepreneurship - ODA, within the framework of the implementation of the project "HEGO - plants for economic growth" implemented in Greece, Armenia, the Republic of Moldova and Georgia.

## 2. RESEARCH METHODOLOGY

### **General data:**

The survey was carried out during the month of September 2022, through the online survey of the actors of the sector of aromatic and medicinal plants (PAM) in the Republic of Moldova.

The survey was conducted through a dedicated online application. The questionnaire in Romanian was made available to the respondents.

The survey was attended by 61 respondents from the target groups that carry out activities in the sector of growing, production, promotion and marketing of herbaceous plants (medicinal, aromatic, seasoning) and plant products with added commercial value, including from the private public, academic and associative sectors.

### **Questionnaire content:**

The questionnaire contains 30 questions related to the accumulation of information at the national level, about: the competences, needs and expectations of actors in the field, as well as the development opportunities created by the Herb Cluster of the HEGO Project.

***The questionnaire is attached***

### **Requirements for completing the questionnaire**

When completing the questionnaire in online format, the respondent marked the selected answers. When questions arose related to the survey process, they were addressed to the contact person within the CCI of the Republic of Moldova.

### **Confidentiality of Survey Results**

Respondent information is confidential, ensuring respondent anonymity.

### **Information processing**

The data obtained from the questionnaires were entered into the database and their technical processing and logical control were carried out.

### 3. RESULTS OF THE ANALYSIS OF THE PROCESSED DATA

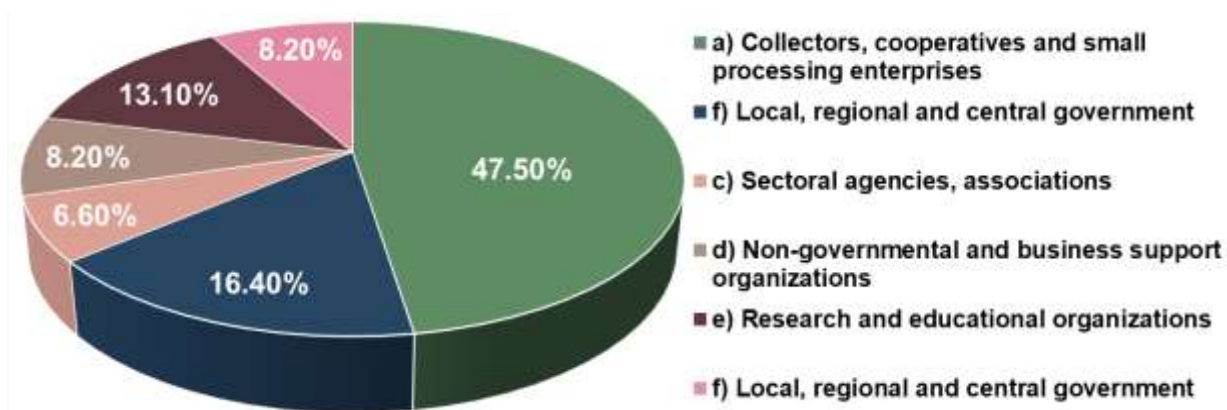
The chapter contains the analysis of the answers to each question of the questionnaire according to the compartments.

The figures illustrating responses to multiple-choice questions contain two indicators for comparison: Frequencies (ie, the number of responses) and Percentage of cases (ie, the percentage of respondents who gave a certain type of answer). Only the "percentage of cases" indicator is analyzed in the text.

#### 3.1. Please indicate which target group of the herb sector you belong to?

61 respondents participated in the survey, most of whom (64%) are representatives of the private sector, namely: 47.5% are collection companies, cooperatives and small processing companies, and 16.4% - medium and large processing companies (Figure 1). At the same time, 13.1% of respondents are research and education organizations, followed by local, regional and central administration and sectorial agencies, associations (8.2% each), as well as non-governmental and business support organizations (6.6%).

Figure 1: The target group in the commercial value-added plants sector to which the respondents belong



#### 3.2. Please indicate the period of your involvement in herb sector?

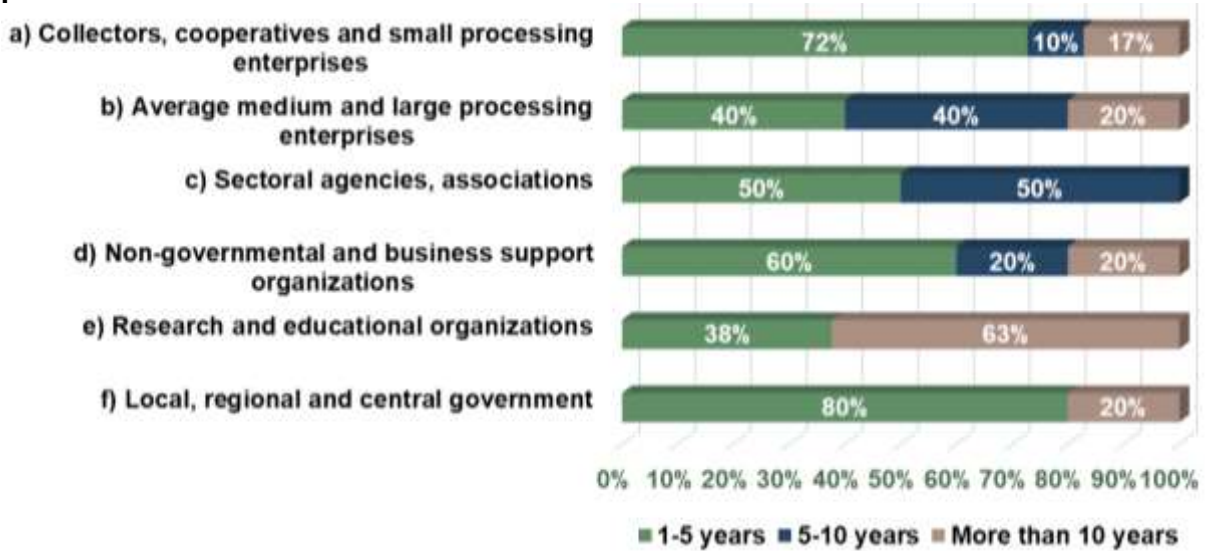
The majority of respondents (61%) have been active in the sector of plants with added commercial value for up to 5 years, 16 percent - from 5 to 10 years, and 23% have been active in the sector for more than 10 years (Figure 2.1).

Figure 2.1: The period of activation of the respondents in the sector of commercial value-added plants.



The majority of collection enterprises, cooperatives and small processing enterprises (72% of these respondents) of local, regional and central administration representatives (80% of these respondents) have been active in the sector for up to 5 years, and 40 percent of processing enterprises each medium and large are present in the sector for up to 10 years. At the same time, most research and education organizations have been active in the sector for over 10 years. (Figure 2.2)

Figure 2.2: The period of activation of the respondents in the sector of commercial value-added plants.

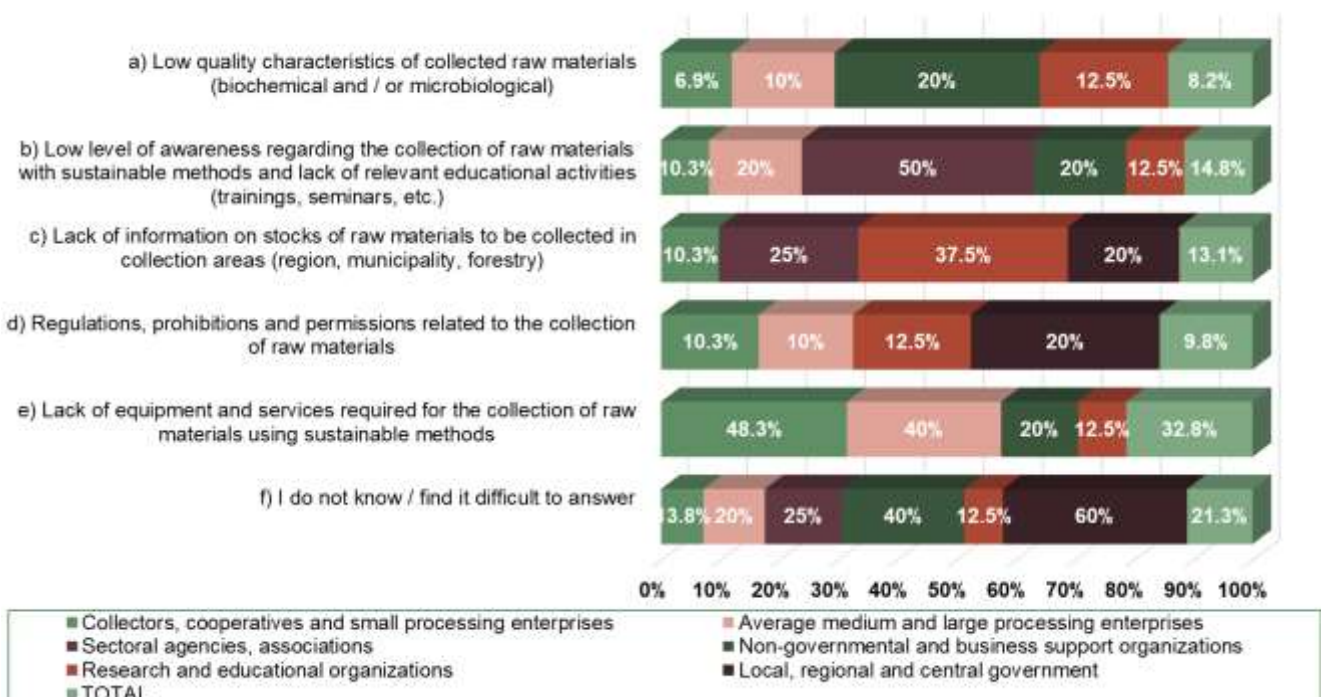


### 3.3. Please name the main challenge related to the collection of commercially valuable herbs' raw materials?

The main challenge related to the collection of raw material of plants with added commercial value, mentioned by 32.8% of the respondents, is the lack of equipment and services necessary for the collection of raw materials using sustainable methods. This is followed by:

- low level of knowledge of sustainable methods of raw material collection and the lack of relevant activities (training, seminars, etc.) – indicated by 14.75 percent of respondents;
- lack of information regarding the stocks of raw materials to be collected in the collection areas (region, municipality, forestry) - indicated by 13.11 percent of the respondents;
- regulations, prohibitions and authorizations related to the collection of raw materials – indicated by 9.84 percent of respondents;
- low quality of collected raw materials (biochemical and/or microbiological) – indicated by 8.2 percent of respondents. (Figure 3)

Figure 3: The main challenge related to the collection of raw material of plants with added commercial value



For over 48% of collectors, cooperatives and small processing enterprises and over 40% of small and medium-sized processing enterprises, the main challenge related to the collection of commercial value-added plant raw material is the lack of equipment and services necessary for the collection of raw materials using sustainable methods. This is followed by the low level of knowledge of sustainable raw material collection methods and the lack of relevant activities (mentioned by 20% of small and medium processing enterprises and 10.3% of cooperatives and small processing enterprises).

Also, collection companies, cooperatives and small processing companies equally (10.3% of these respondents) consider the regulations, prohibitions and authorizations related to the collection of raw materials and the low quality of the collected raw materials (biochemical and/or microbiological).

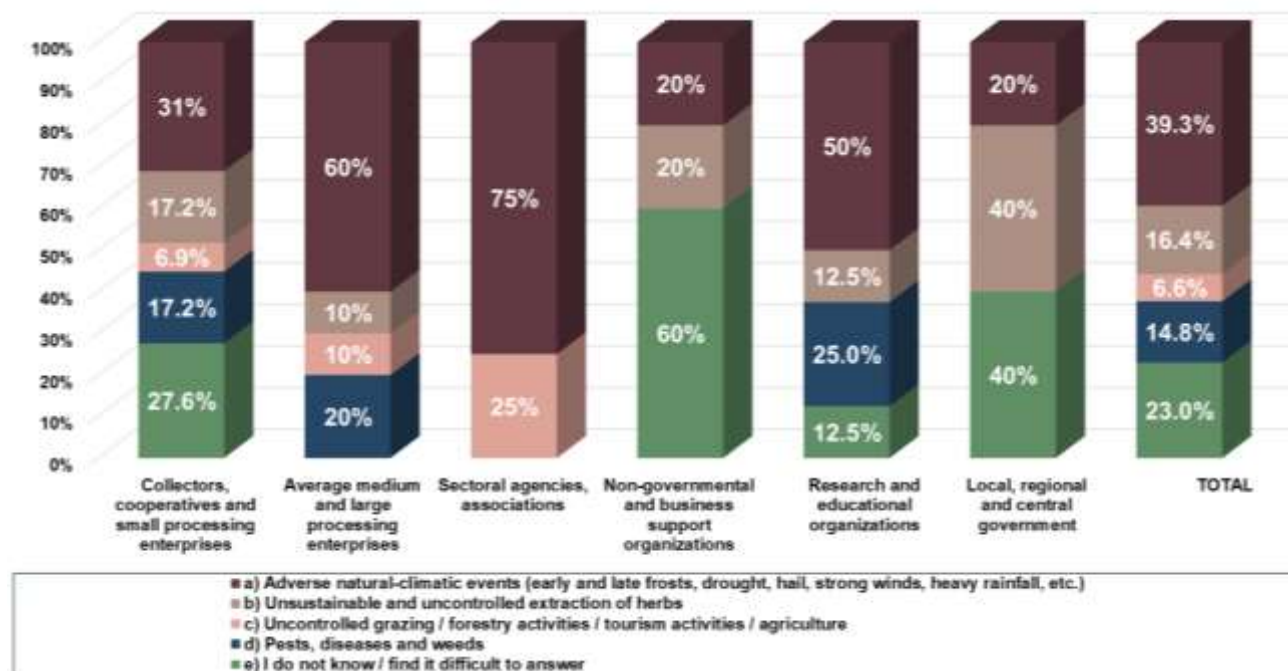
At the same time, 60 percent of local, regional and central government respondents, 40 percent of non- governmental and business support organizations and 25 percent of sectoral agencies and associations could not prioritize the challenges related to the collection of valuable plant raw material added commercial mentioned in the questionnaire.

### 3.4. Please indicate the main negative factor affecting the yield of commercially valuable herb products?

Unfavorable meteorological phenomena (early and late frosts, drought, hail, strong winds, heavy rainfall, etc.) or natural calamities is indicated as the main negative factor affecting the harvest of plants with added commercial value by 39.3% of the survey participants (Figure 4). This is followed by:

- unsustainable and uncontrolled collection of herbs (indicated by 16.4 percent of respondents);
- pests, diseases and weeds (indicated by 14.8 percent of respondents) and
- grazing/forestry activities/tourism activities/uncontrolled agricultural activities (indicated by 6.6 percent of respondents).

Figure 4: The main negative factor affecting the yield of commercial value-added plants



Also, 31% of collecting enterprises, cooperatives and small processing enterprises, and 60% of medium and large processing enterprises consider the main challenge related to the collection of raw material of plants with added commercial value – adverse weather phenomena or natural calamities. Subsequently, with 17 and 20 percent, respectively, this category of respondents mentions pests, diseases and weeds.

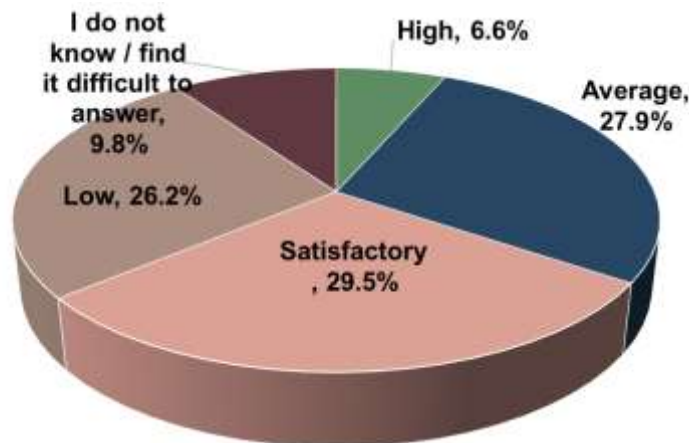
It should be noted that 23 percent of all respondents and 28% of collection enterprises, cooperatives and small processing enterprises, as well as 60% of non-governmental organizations

and business support and 40% of local, regional and central government representatives could not prioritize the negative factors affecting the harvest of commercial value-added plants mentioned in the questionnaire.

### 3.5. How would you assess your level of knowledge regarding the sustainable collection of commercially valuable herbs' raw materials?

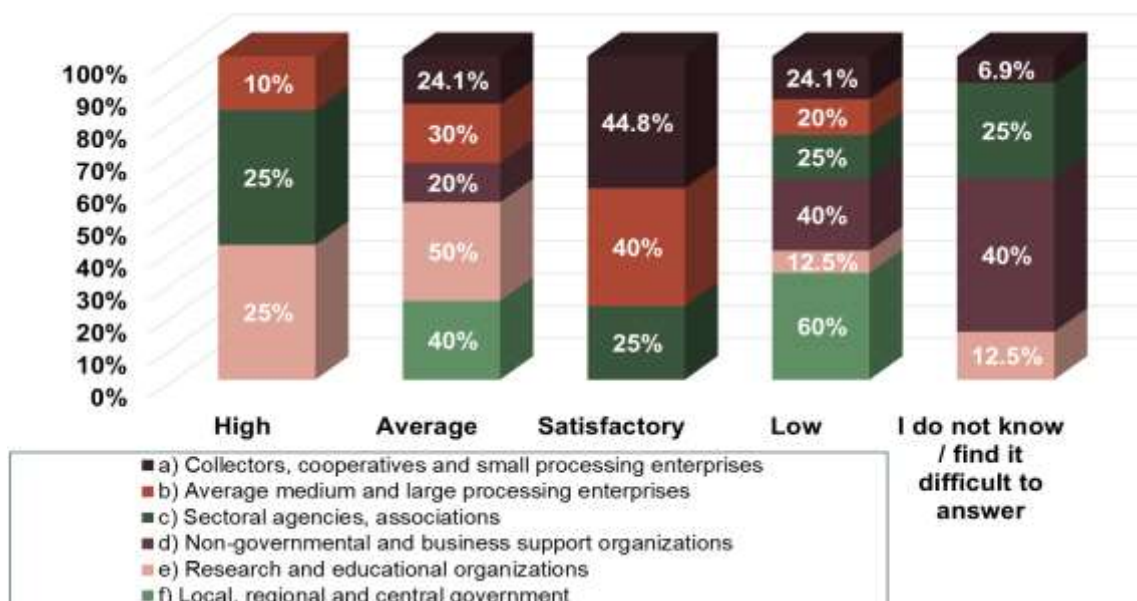
The vast majority of survey participants rate their level of knowledge regarding the collection of plants with added commercial value as satisfactory (29.5% of respondents), medium (28% of respondents) or poor (26.2% of respondents). Only 6.6 percent of the participants consider that they have a high level of knowledge in the field. (Figure 5.1)

Figure 5.1: Self-assessment of the level of knowledge regarding the collection of plants with added commercial value



A high level of knowledge regarding the collection of plants with added commercial value was indicated by respondents from the category of research and education organizations (25% of these respondents), from the category of sector agencies, associations (25% of these respondents) and from the category of enterprises medium and large processing plants (10% of these respondents). (Figure 5.2). At the same time, the poor level of knowledge regarding the collection of plants with added commercial value was mentioned by 60% of representatives of local, regional and central administration, 40% of non- governmental and business support organizations and about 20% of collection enterprises, cooperatives and small processing enterprises, agencies and sectoral associations and medium and large processing enterprises.

Figure 5.2: Self-assessment of the level of knowledge regarding the collection of plants with added commercial value



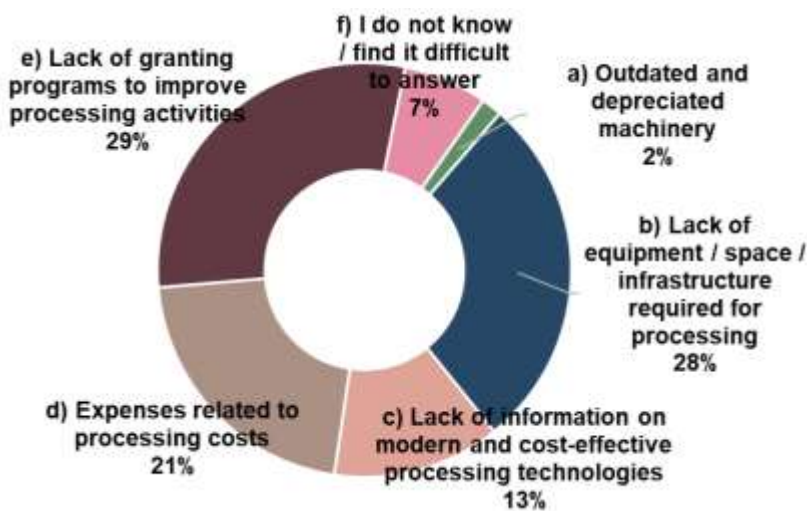
### 3.6. Please indicate the main challenge related to the processing of commercially valuable herb products?

The main challenges related to the processing of plant products with added commercial value, indicated by the majority of respondents, are:

- lack of grant programs to improve processing activities (mentioned by 29.5 percent of respondents);
- lack of equipment / space / infrastructure necessary for processing (mentioned by 28 percent of respondents) and
- expenses related to processing costs (mentioned by 21 percent of respondents) (Figure 6)

It should be noted that the lack of grant programs to improve processing activities was indicated as the main challenge by 50% of research and education organizations, 40% of medium and large processing enterprises, non-governmental and business support organizations and from local, regional and central administration respondents. At the same time, 60 percent of local, regional and central administration representatives, or the vast majority of these categories of respondents, indicated the lack of information on modern and cost-effective processing technologies as the main challenge related to the processing of plant products with added commercial value.

Figure 6: The main challenge related to the processing of plant products with added commercial value



### 3.7. Please name the main determinant of the quality of commercially valuable processed herb products?

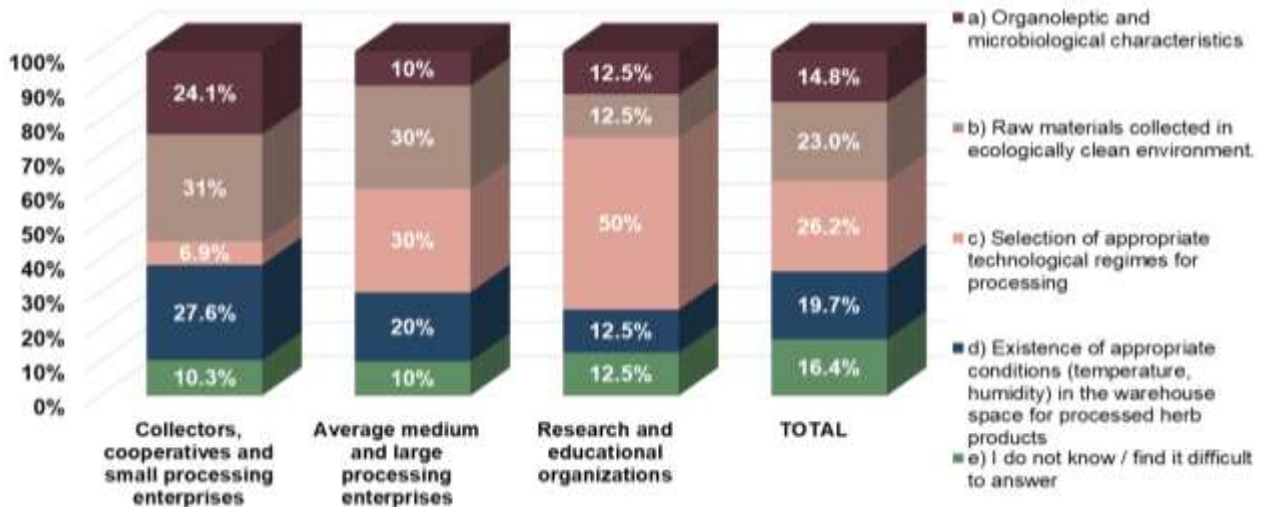
The selection of appropriate technological regimes for processing and raw materials collected in a clean ecological environment are indicated as the main determinants of the quality of plant products with added commercial value by 26.2 and 23 percent of the survey participants. (Figure 7). These are followed by:

- the appropriate conditions (temperature, humidity) in the storage space for processed plant products (mentioned by 19.7 percent of the respondents) and
- organoleptic and microbiological characteristics (indicated by 14.8 percent of respondents).

Also, 31% of collection enterprises, cooperatives and small processing enterprises, and 30% of medium and large processing enterprises consider as the main determinant of the quality of plant products with added commercial value - raw materials collected in an ecologically clean environment. Subsequently, the collection enterprises, cooperatives and small processing enterprises, opt for the appropriate conditions (temperature, humidity) in the storage space of the processed plant products and the organoleptic and microbiological characteristics with respectively 27.6 and 24 percent of votes. The selection of appropriate technological regimes for processing and raw materials collected in a clean ecological environment are indicated as the main determinants of the quality of plant products with added commercial value by 30% of medium and large processing enterprises. The opinion of the companies operating in the sector is also shared by the organizations of research and education, 50 percent of respondents to which, consider the selection of appropriate technological

regimes for processing as the main determinant of the quality of plant products with added commercial value.

Figure 7: **The main determinant of the quality of commercial value-added plant products**

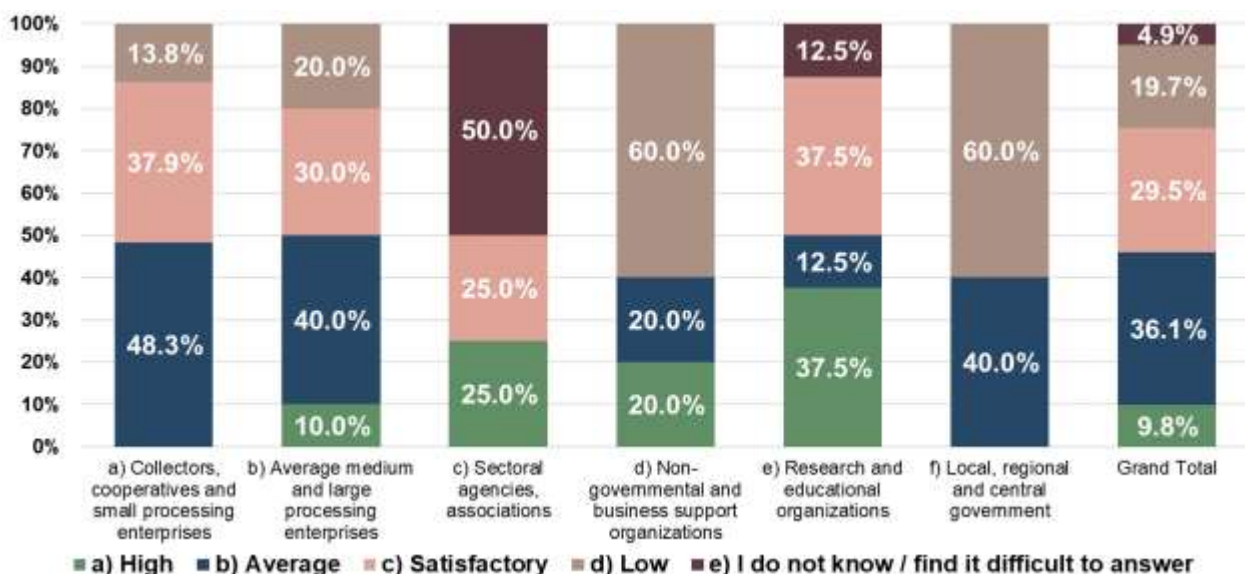


### 3.8. How would you assess your level of knowledge regarding the processing of commercially valuable herb products?

The vast majority of survey participants assess their level of knowledge regarding the processing of plant products with added commercial value as average (36.1% of respondents), satisfactory (29.5% of respondents) or poor (around 20% of respondents). Only 10 percent of participants consider themselves to have a high level of knowledge in the field. (Figure 8)

High level of knowledge regarding the processing of plant products with added commercial value was indicated by the respondents from the category of research and education organizations (37.5% of these respondents), from the category of sectoral agencies, associations (25% of these respondents), from the category of non-governmental and business support organizations (20% of these respondents) and the category of medium and large processing enterprises (10% of these respondents). At the same time, the low level of knowledge regarding the processing of plant products with added commercial value was mentioned by 60% of representatives of local, regional and central administration and non-governmental and business support organizations, 20% of medium and large processing enterprises and 14% from collection enterprises, cooperatives and small processing enterprises.

Figure 8: **Self-assessment of the level of knowledge regarding the processing of plant products with added commercial value**

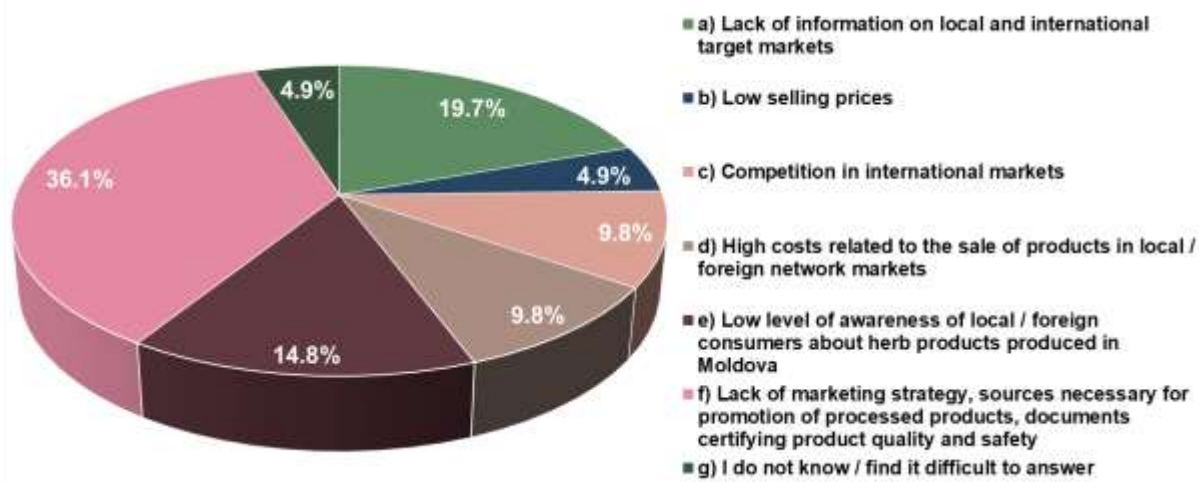


### 3.9. Please name the main challenge related to trade / sale of commercially valuable herb products?

The main challenge related to the trade/sale of plant products with added commercial value, mentioned by 36.1% of the respondents, is the lack of a marketing strategy, the sources necessary to promote the processed products, the documents certifying the quality and safety of the product. This is followed by:

- lack of information about local and international markets – indicated by 19.7 percent of respondents;
- the low level of knowledge of local/foreign consumers about plant products manufactured in Moldova - indicated by 14.8 percent of respondents;
- competition on international markets and high costs related to marketing products on local/foreign markets – indicated by 9.8 percent of respondents and
- low selling prices – indicated by 4.9 percent of respondents. (Figure 9)

Figure 9: **The main challenge related to the trade/sale of commercial value-added herbal products**



For collection companies, cooperatives and small processing companies, the main challenge is the lack of marketing strategy, the necessary sources to promote the processed products (about 38% of these respondents), followed by the lack of information about local and international markets (20.7%), low selling prices, competition in international markets and high costs related to selling products in local/foreign markets (10.3 each of these respondents).

For medium and large processing enterprises, the main challenge related to the trade/sale of commercial value-added plant products is the lack of information on local and international markets (30% of these respondents), followed by the high costs related to the marketing of products on local markets /foreign, the low level of knowledge of local/foreign consumers about plant products manufactured in Moldova and the lack of marketing strategy, of the necessary sources to promote the processed products (20 percent each).

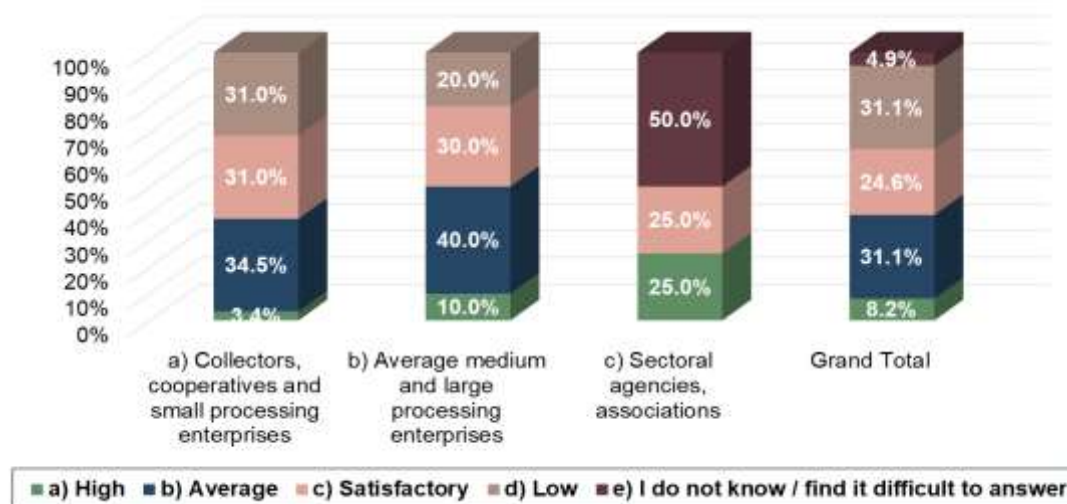
At the same time, 25% of agencies and sector associations, 12.5% of non-governmental and business support organizations and 3.5% of collection enterprises, cooperatives and small processing enterprises could not prioritize the challenges related to the trade/sale of herbal products with added commercial value mentioned in the questionnaire.

### 3.10. How would you assess your level of knowledge regarding the trade / sale of commercially valuable herb products?

The vast majority of survey participants rate their level of knowledge about the trade/sale of commercial value-added herbal products as average (31.1% of respondents), poor (31.1% of respondents) or satisfactory (24.6% of respondents). Only 8.2 percent of survey participants believe they have a high level of knowledge in the field. (Figure 10)

A high level of knowledge on the trade/sale of commercial value-added herbal products was indicated by respondents from the category of sector agencies, associations (25% of these respondents) and non-governmental and business support organizations (20% of these respondents), followed by respondents from the category and from the category of medium and large processing enterprises (10% of these respondents). At the same time, the poor level of knowledge regarding the trade/sale of plant products with added commercial value was mentioned by 60% of the representatives of local, regional and central administration and non-governmental and business support organizations, but also by 31% of the collection, cooperatives and small processing enterprises and 20% of the category of medium and large processing enterprises.

Figure 10: **Self-assessment of the level of knowledge on the trade/sale of commercial value-added herbal products**



### 3.11. Please name the main challenge related to bio-certification of commercially valuable herb products.

The main challenge related to the organic certification of plant products with added commercial value, mentioned by 29.5% of respondents, is the high costs associated with organic certification. This is followed by:

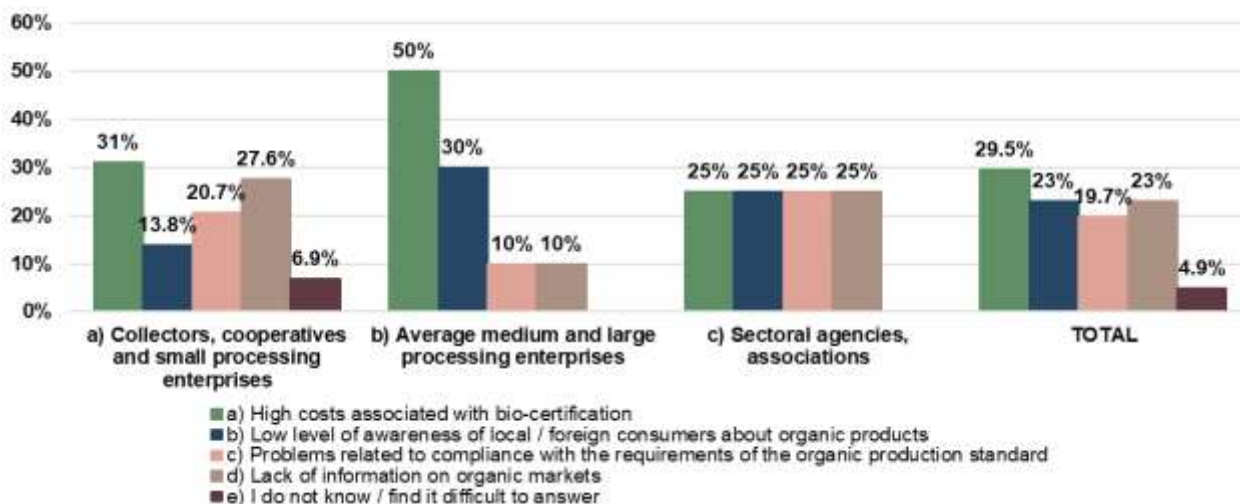
- the low level of awareness of local/foreign consumers regarding organic products
- indicated by 23 percent of respondents;
- lack of information about organic markets – indicated by 23 percent of respondents and
- problems related to compliance with the requirements of the organic production standard – indicated by 19.7 percent of respondents. (Figure 11)

More than 31% of collectors, cooperatives and small processing enterprises and more than 50% of small and medium-sized processing enterprises also consider the high costs associated with organic certification as the main challenge related to organic certification of commercial value-added plant products.

For collection companies, cooperatives and small processing companies, important challenges are the lack of information about organic markets (27.6% of these respondents) and problems related to compliance with the requirements of the organic production standard (about 21% of these respondents). While representatives of local, regional and central administration (40% of these respondents), research and education organizations (38% of these respondents) and small and medium-sized processing enterprises (over 30% of these respondents), emphasize the low-level awareness of local/foreign consumers regarding ecological products.

Only 7 percent of the respondents of collection enterprises, cooperatives and small processing enterprises and 12.5 percent of the representatives of research and education organizations, could not prioritize the challenges related to the organic certification of products from plants with added commercial value mentioned in the questionnaire.

Figure 11: The main challenge related to the organic certification of commercial value-added plant products

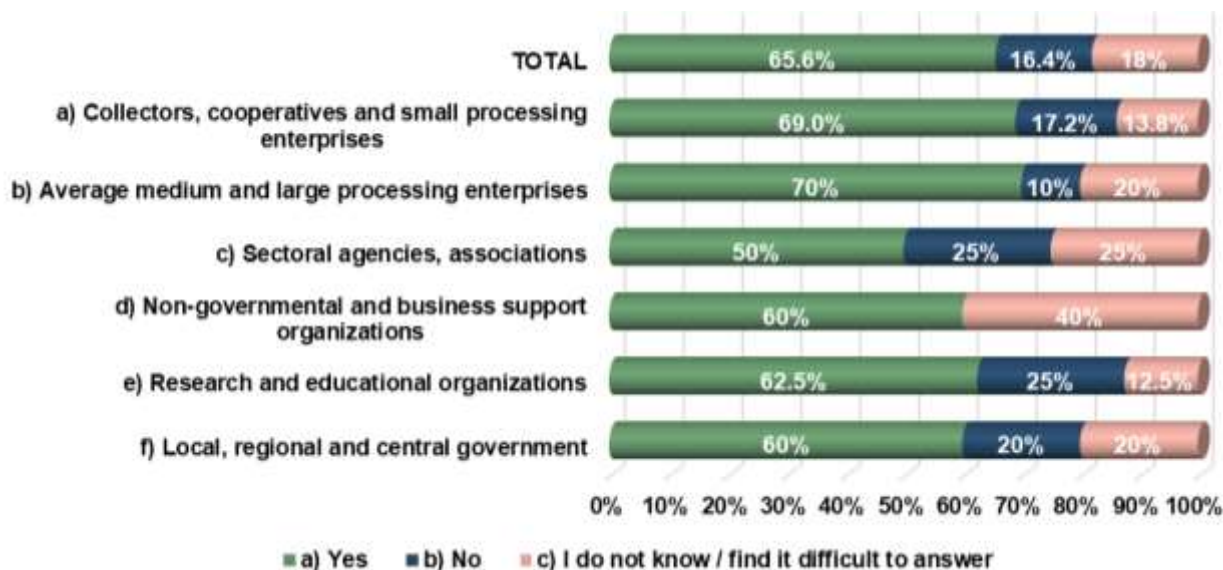


### 3.12. Does organic certification allow products to be sold at a higher, premium price?

65.6 percent of respondents believe that organic certification allows products to be sold at a higher price, and only 16.4 percent do not support this position. (Figure 12)

The most sceptical turned out to be the representatives of non-governmental and business support organizations, 40% of whom believe that organic certification does not influence the increase in the selling price of products.

Figure 12: The impact of organic certification on the selling price of products



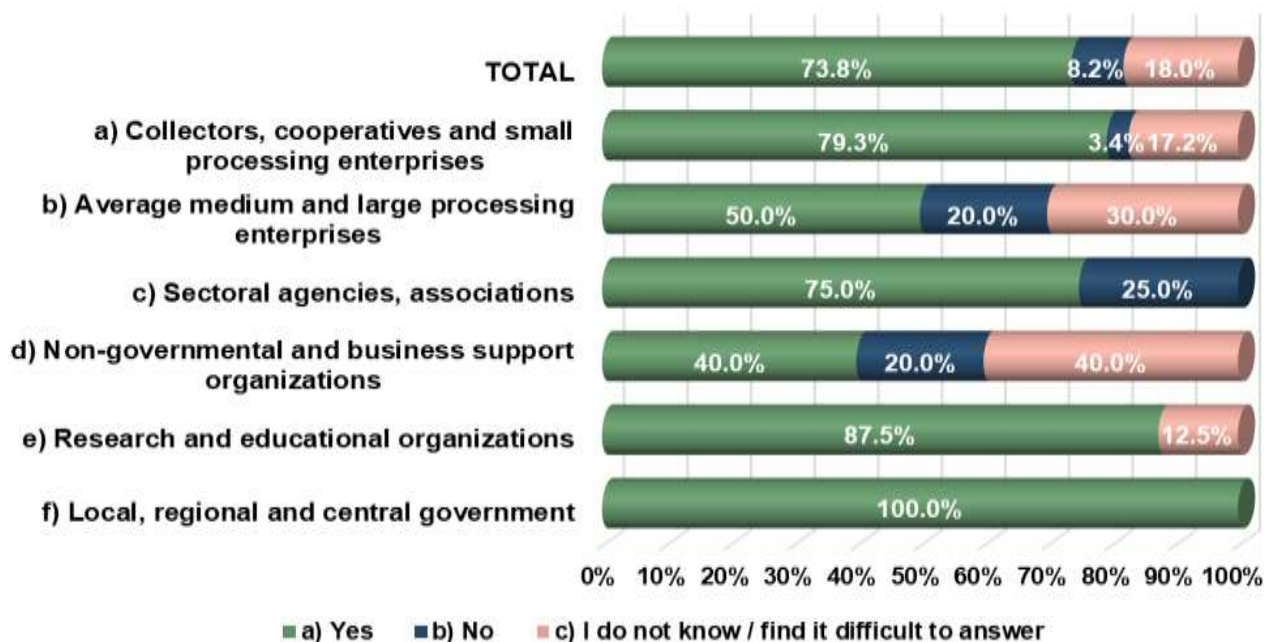
### 3.13. Does organic certification facilitate access to export, niche, organic products markets?

About 74 percent of respondents believe that organic certification facilitates access to export markets for organic products, namely: 100% of local, regional administration representatives and central, about 88% of research and education organizations, 79% of collection enterprises, cooperatives and small processing enterprises, 75% of sectoral agencies, associations, about 50% of medium and large processing enterprises and 40% of organizations non-governmental and business support. (Figure 13)

Only 8.2 percent of respondents believe that organic certification does not facilitate access to export markets for organic products. Most of them are respondents from sector agencies, associations (25%), medium and large processing enterprises and non-governmental and business support organizations (20% each).

At the same time, 18 percent of respondents namely 40% of non-governmental and business support organizations, 30% of medium and large processing enterprises, 17% of collection enterprises, cooperatives and small processing enterprises and 12.5% of organizations of research and education could not confirm whether or not organic certification facilitates access to export markets for organic products.

Figure 13: **The impact of organic certification on facilitating access to export markets for organic products**



### 3.14. How would you assess your level of knowledge regarding the bio-certification of commercially valuable herb products?

The vast majority of survey participants rate their level of knowledge about biocertification of plant products with added commercial value as poor (31.1% of respondents), medium (28% of respondents) or satisfactory (23% of respondents). Only 13.1 percent of the participants consider that they have a high level of knowledge in the field. (Figure 14.1)

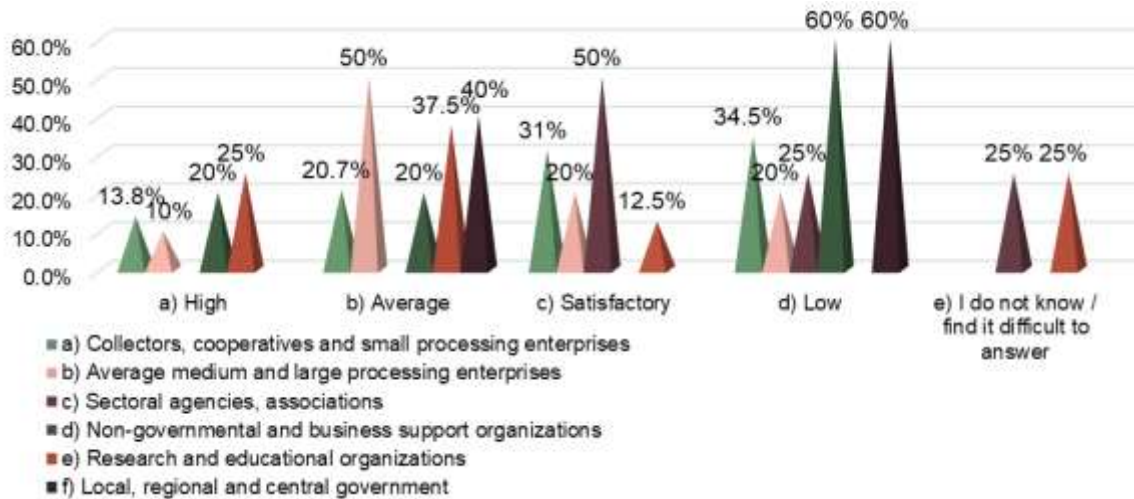
Figure 14.1: **Self-assessment of the level of knowledge regarding the bio-certification of plant products with added commercial value**



A high level of knowledge about the collection of plants with added commercial value was indicated by respondents from the category of research and education organizations (25% of these respondents), non-governmental and business support organizations (20% of these respondents), collection enterprises, cooperatives and small processing enterprises (about 14% of these respondents) and medium and large processing enterprises (10% of these respondents). (Figure 14.2).

At the same time, the poor level of knowledge regarding the collection of plants with added commercial value was mentioned by 60% of representatives of local, regional and central administration and non-governmental and business support organizations, 34.5% of collection enterprises, cooperatives and small businesses of processing, 25% of respondents from sectoral agencies, associations and 20% from medium and large processing enterprises.

Figure 14.2: **Self-assessment of the level of knowledge regarding the bio-certification of plant products with added commercial value**



### 3.15. Please name the main challenge related to the cultivation of commercially valuable herb products.

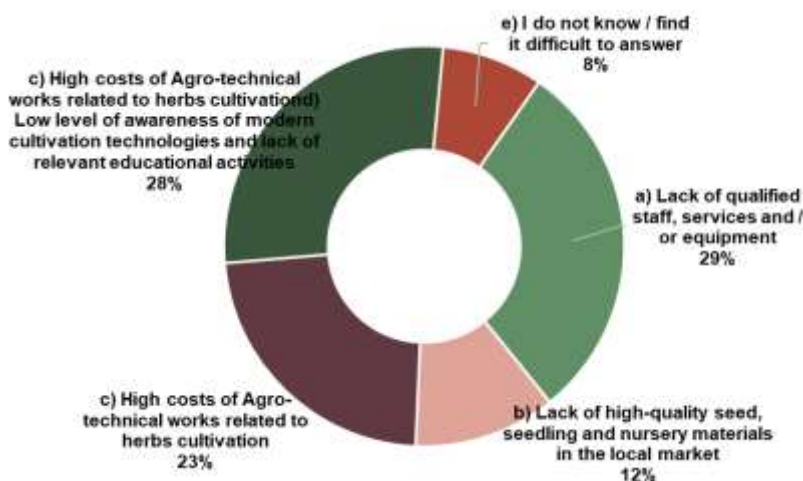
The main challenges related to the cultivation of plant products with added commercial value, mentioned by the survey participants, are: the lack of qualified personnel, services and/or equipment (29.5% of respondents), the low level of knowledge of modern cultivation technologies and the lack of activities relevant educational (28% of respondents) and the high costs of agrotechnical works related to herb cultivation (28% of respondents). (Figure 15)

Thus, the lack of qualified personnel, services and/or equipment is the main challenge for collection enterprises, cooperatives and small processing enterprises (34.5% of these respondents), non-governmental and business support organizations (40% of these respondents) and research and education organizations (37.5% of these respondents).

The high costs of agrotechnical works related to the cultivation of herbs are the main challenge for medium and large processing enterprises (40% of respondents), and the low level of knowledge of modern cultivation technologies and the lack of relevant educational activities is the main challenge related to the cultivation of plant products with added commercial value indicated by local, regional and central administration (60% of these respondents) and sector agencies, associations (50% of these respondents).

The lack of high-quality melons, seeds and planting material on the local market is mentioned by 20% of non-governmental and business support organizations, about 14% of collection enterprises, cooperatives and small processing enterprises, 12.5% of research and education and by 10% of medium and large processing enterprises.

Figure 15: **The main challenge related to the cultivation of commercial value-added plant products**

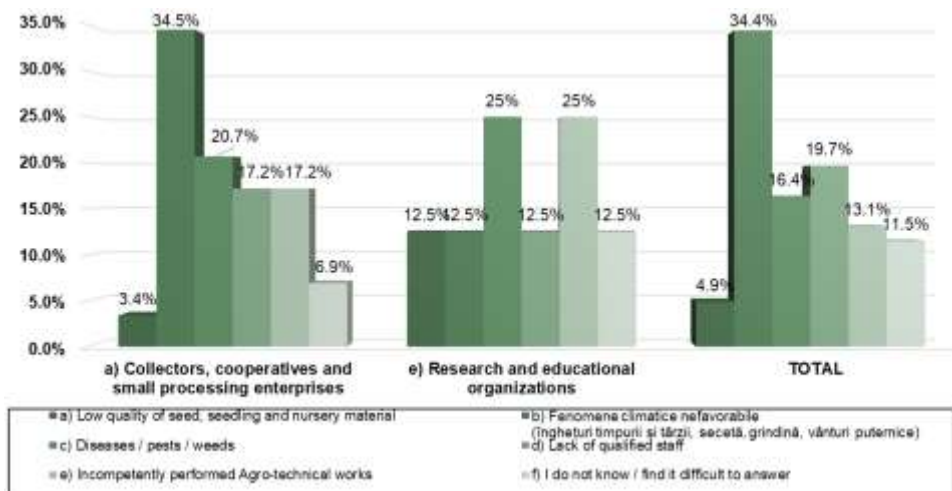


### 3.16. Please indicate the main negative factor affecting the yield of cultivated herb species.

Unfavorable climatic phenomena (early and late frosts, drought, hail, strong winds) was indicated as the main negative factor affecting the harvest of cultivated plant species, by most of the survey participants, including:

- 75% of sectoral agencies, associations;
- 50% of medium and large processing enterprises and
- 34.5 from collection enterprises, cooperatives and small processing enterprises. (Figure 16)

Figure 16: The main negative factor affecting the yield of cultivated plant species



For collection enterprises, cooperatives and small processing enterprises, important negative factors affecting the harvest of cultivated plant species are diseases / pests / weeds (indicated by about 21% of these respondents), lack of qualified personnel and agrotechnical works performed incompetently, indicated by about 21% of these respondents.

Medium and large processing enterprises consider diseases / pests / weeds and lack of qualified personnel (indicated by 20% of these respondents). While the representatives of the local, regional and central administration (40% of these respondents), emphasize the lack of qualified personnel.

At the same time, 60 percent of the representatives of non-governmental and business support organizations, 20 percent of the representatives of the local, regional and central administration, 12.5 percent of the respondents of research and education organizations and 7% of the collection enterprises, cooperatives and enterprises small processing plants could not prioritize the negative factors affecting the harvest of cultivated plant species mentioned in the questionnaire.

### 3.17. How would you assess your level of knowledge regarding the cultivation of commercially valuable herb products?

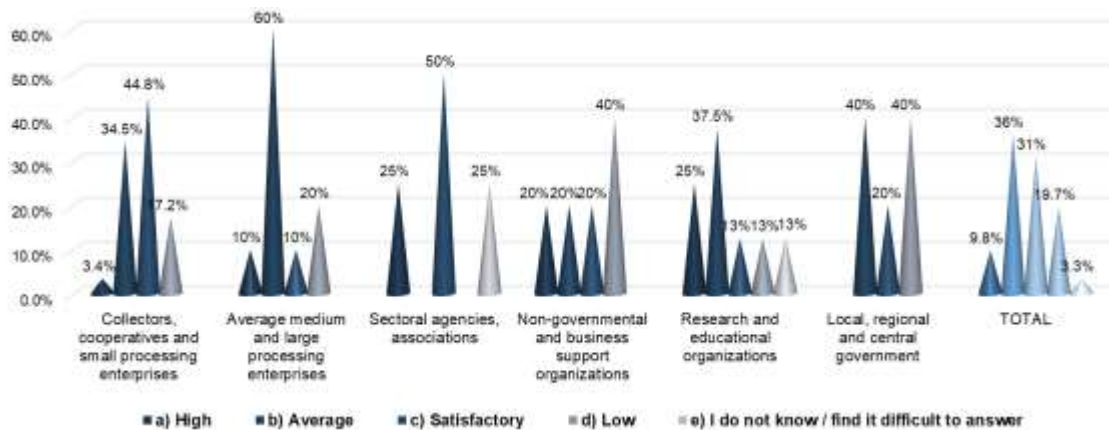
The vast majority of survey participants rate their level of knowledge regarding the cultivation of commercial value-added plant products as average (36% of respondents), satisfactory (31% of respondents) or poor (19.7% of respondents). Only 9.8 percent of the participants consider that they have a high level of knowledge in the field. (Figure 17)

High level of knowledge regarding the cultivation of plant products with added commercial value was indicated by respondents from the category of research and education organizations (25% of these respondents), from the category of sector agencies, associations (25% of these respondents), 20 percent from non-governmental and business support organizations, 10 percent from medium and large processing enterprises, and 3.4 percent from collection enterprises, cooperatives and small processing enterprises.

At the same time, the poor level of knowledge regarding the cultivation of plant products with added commercial value was indicated by 40% of representatives of local, regional and central administration, and non-governmental and business support organizations, by 20% of medium-sized

processing enterprises and large, by 17.2% of collection enterprises, cooperatives and small processing enterprises and 13% of respondents of research and education organizations.

Figure 17: **Self-assessment of the level of knowledge regarding the cultivation of commercial value-added plant products**



### 3.18. Please name the main challenge in the herb sector of Moldova?

The main challenge in the sector of plants with added commercial value in Moldova, mentioned by 31.1% of respondents, is the lack of educational programs and grants. (Figure 18.1) This is followed by:

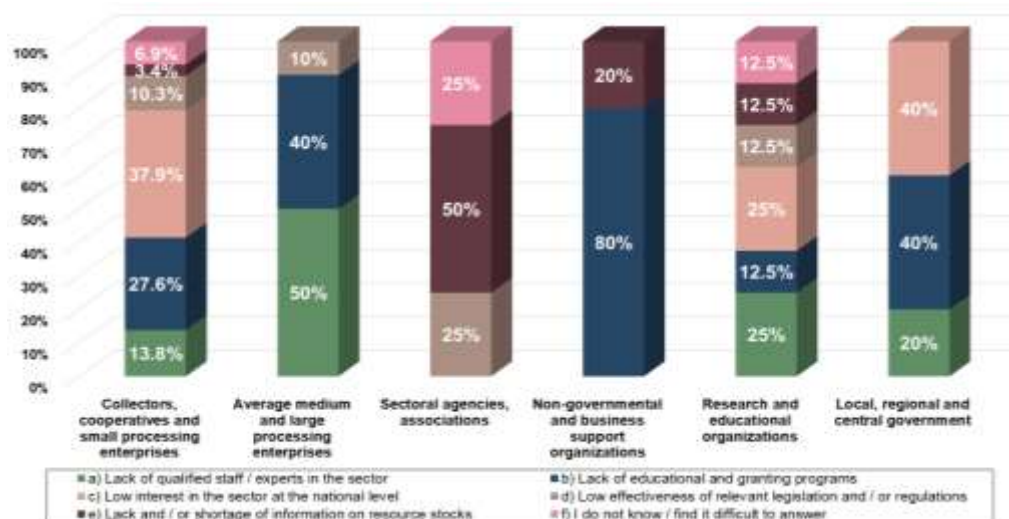
- the low interest in the sector at the national level – indicated by 24.6 percent of respondents and
- lack of qualified staff/experts in the field – indicated by 19.7 percent of respondents.

Figure 18.1: **The main challenge in the sector of plants with added commercial value in Moldova**



For collection enterprises, cooperatives and small processing enterprises, important challenges in the commercial value-added plant sector in Moldova are the low interest in the sector at the national level (about 38% of these respondents) and the lack of educational programs and grants (27.6% of these respondents). (Figure 18.2)

Figure 18.2: **The main challenge in the sector of plants with added commercial value in Moldova**



At the same time, for medium and large processing enterprises, the lack of qualified personnel/experts in the field (50% of these respondents) and the lack of educational programs and grants (40% of these respondents) are important challenges.

The majority of non-governmental and business support organizations (80% of these respondents) emphasize the lack of educational programs and grants, 50% of sector agencies, associations, - the lack and/or insufficient information on resource stocks, 40% of the respondents of the local, regional and central administration, and 25% of the research and education organizations consider as important challenges in the sector of plants with added commercial value in Moldova - the low interest in the sector at the national level, the lack of qualified staff/experts in the field and lack of educational programs and grants.

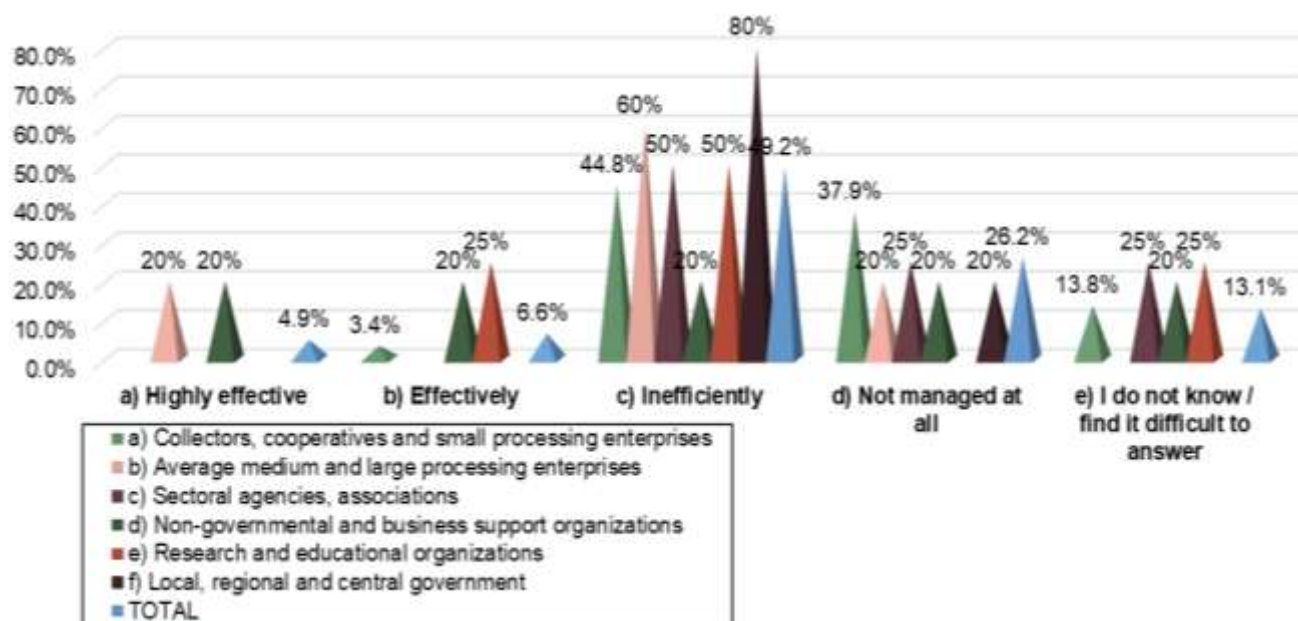
### 3.19. How effectively do you think the herb sector of Moldova is managed?

The vast majority of survey participants (49.2%) believe that the sector of plants with added commercial value in Moldova is managed inefficiently. This opinion is shared by 80% of local, regional and central administration respondents, 60% of medium and large processing enterprises, 50% of sectoral agencies, associations and research and education organizations, about 45% of collection enterprises, cooperatives and enterprises small processing and 20% from non-governmental and business support organizations. (Figure 19)

26.2 percent of respondents believe that the sector is not managed at all. Of these, approximately 38% are collection enterprises, cooperatives and small processing enterprises, 25% - sectoral agencies, associations, and 20% each - collection enterprises, cooperatives and small processing enterprises, non-governmental and business support organizations and local, regional and central government.

6.6% of respondents believe that the sector is managed efficiently and 5 percent - very efficiently. This opinion is shared by non-governmental and business support organizations medium and large processing enterprises (20% of these respondents each) and 25% of research and education organizations.

Figure 19: The degree of efficiency of the management of the sector of plants with added commercial value in Moldova



### 3.20. Are you familiar with existing national legislation on herb products?

54 percent of survey participants are familiar with existing national legislation on plant products with added commercial value. (Figure 20) These include:

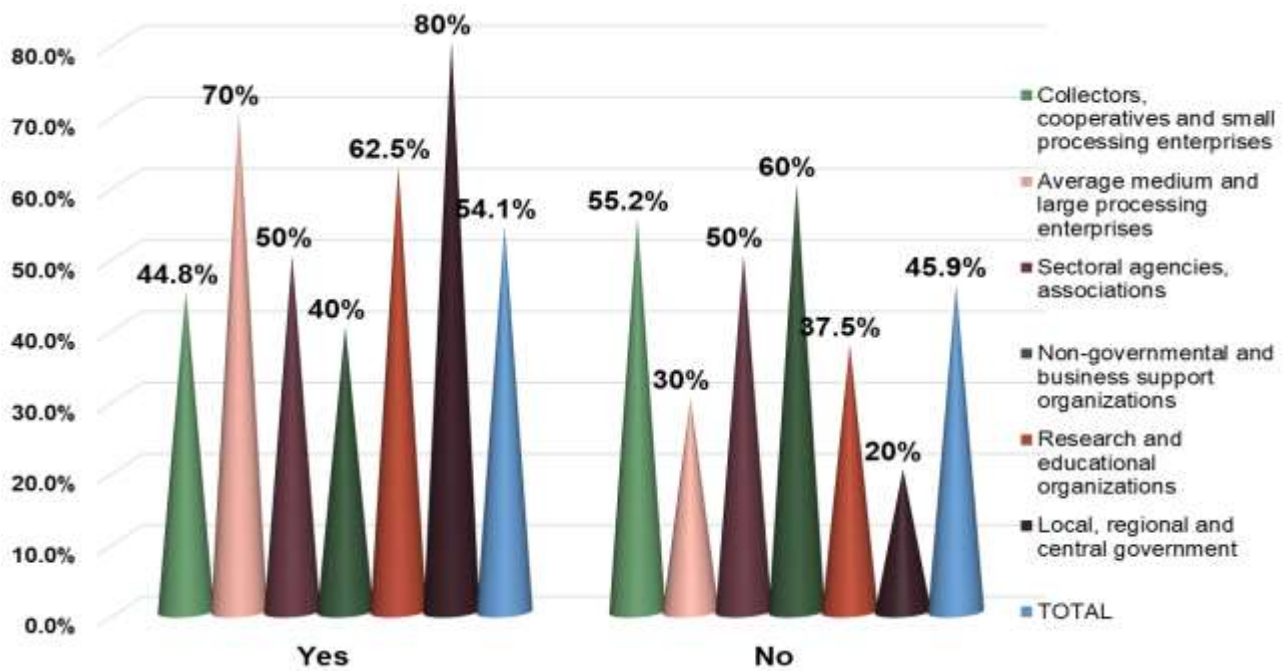
- 80% of local, regional and central administration representatives;
- 70% of medium and large processing enterprises;
- 62.5% from research and education organizations;

- 50% of sectoral agencies, associations;
- About 45% of collection enterprises, cooperatives and small processing enterprises and
- 40% from non-governmental and business support organizations.

At the same time, about half of the respondents (45.9%) indicated that they are not familiar with the existing national legislation regarding plant products with added commercial value. These include:

- 60% of non-governmental and business support organizations;
- 55.2% of collection enterprises, cooperatives and small processing enterprises;
- 50% of sectoral agencies, associations;
- 37.5% from research and education organizations;
- 30% of medium and large processing enterprises
- 20% of local, regional and central government representatives.

Figure 20: **Familiarity with existing national legislation on commercial value-added herbal products**

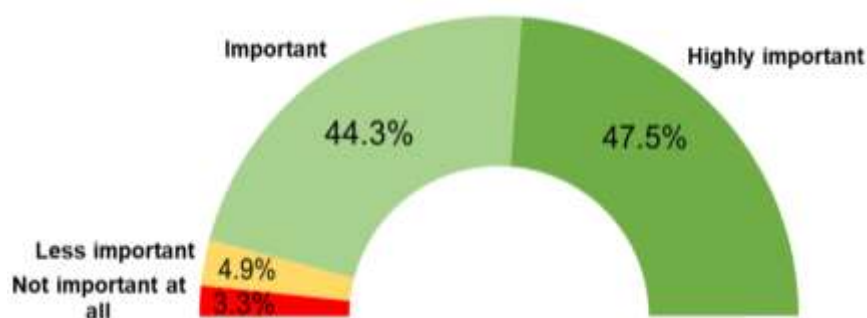


### 3.21. How important is the role of the government in the development of herb sector in Moldova?

Most of the participants in the survey (91.8% of the respondents) consider practically equally (47.5% and 44.3%) the role of the government in the development of the sector of plants with added commercial value in Moldova as important or very important. (Figure 21.1)

Only 4.9% consider it of minor importance, and 3.3% of the respondents, not at all important.

Figure 21.1: **The importance of the role of the government in the development of the sector of plants with added commercial value in Moldova**

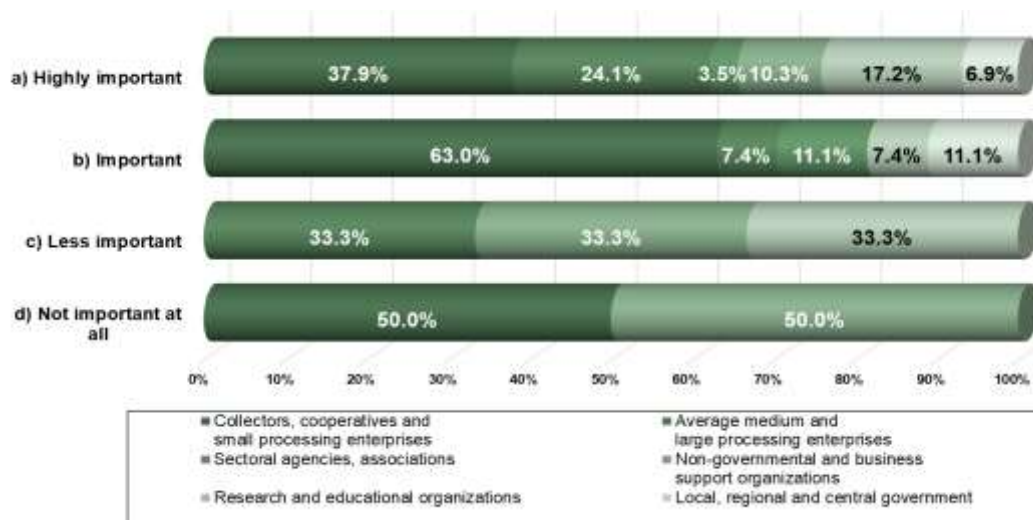


Thus, 58.6 percent of collection companies, cooperatives and small processing companies consider the government's role in developing the sector of plants with added commercial value in Moldova very important, 37.9 percent - important and only 3.5% of them claim that it is not important. (Figure 21.2)

70% of medium-sized processing enterprises and see the major importance of the government's role in the development of the sector, 20% - consider it important, and 10 percent of these respondents consider that the role of the government in the development of the sector of plants with added commercial value in Moldova is of little importance. The same classification with small deviations (62.5%/25%/12.5%) indicates research and education organizations.

On the other hand, non-governmental and business support organizations show a dispersion of opinions, where 60% of the respondents in this category indicate the major importance of the government's role in the development of the sector of plants with added commercial value in Moldova, and the rest, equally states the minor importance and lack of importance of the government's role in the development of the sector.

Figure 21.2: The importance of the role of the government in the development of the sector of plants with added commercial value in Moldova



### 3.22. How important is the existence of herb products association for the development of the sector?

More than half of the participants in the survey (59%) consider the existence of an association in the sector of plants with added commercial value very important for the development of the sector. (Figure 22) These include:

- 80% of medium and large processing enterprises;
- 62.5% from research and education organizations;
- 60% of non-governmental and business support organizations and local, regional and central government representatives;
- 55.2% of collection enterprises, cooperatives and small processing enterprises and
- 25% from sector agencies, associations.

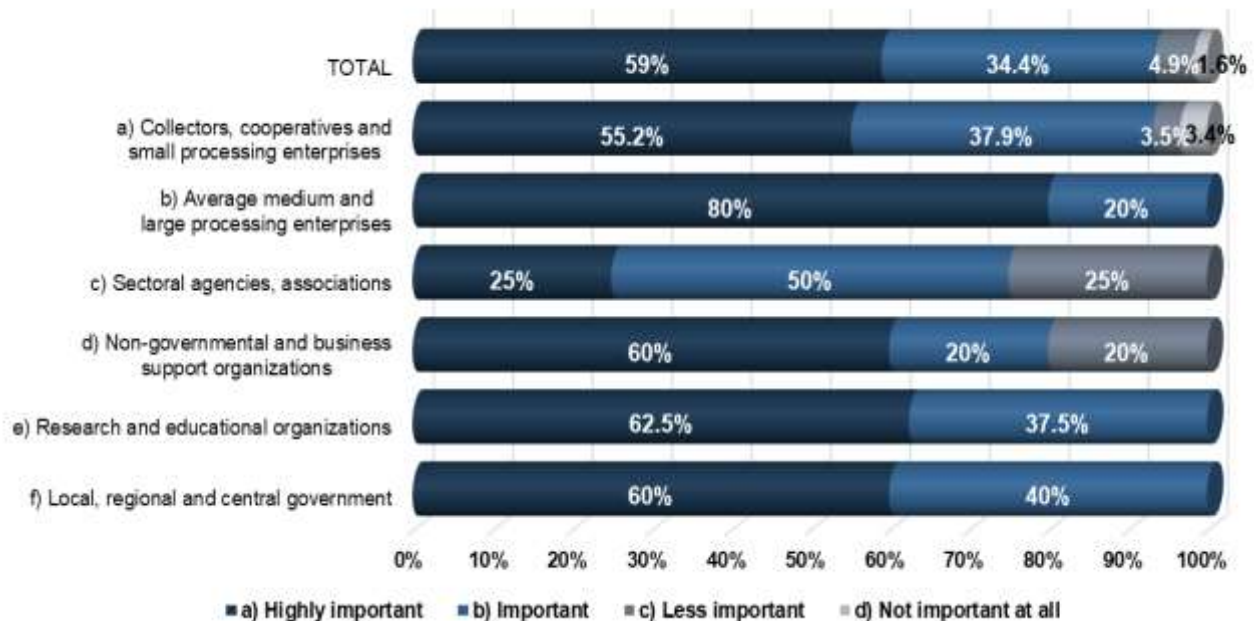
34.4 percent of the survey participants indicated that the existence of an association in the sector of plants with added commercial value is important for the development of the sector. This opinion is shared by:

- 50% of sectoral agencies, associations;
- 40% of local, regional and central administration representatives;
- about 38% of collection enterprises, cooperatives and small processing enterprises and research and education organizations;
- 20% from medium and large processing enterprises and non-governmental and business support organizations.

At the same time, the minor importance for the development of the sector of the existence of an association in the sector of plants with added commercial value was mentioned by 25 percent of the

sector agencies, associations, 20 percent of non-governmental and business support organizations and 3.5 percent of collection enterprises, cooperatives and small processing enterprises, and the lack of importance of such an association was indicated by only 3.4 percent of collection enterprises, cooperatives and small processing enterprises.

**Figure 22: The importance of the existence of an association in the sector of plants with added commercial value for the development of the sector**



### 3.23. How important is the role of herb sector in employment of local population, income generation and developing the local economy?

More than half of the survey participants (57.4%) consider the role of the commercial value-added plants sector in employing the local population, generating income and developing the local economy to be of major importance. (Figure 23) These include:

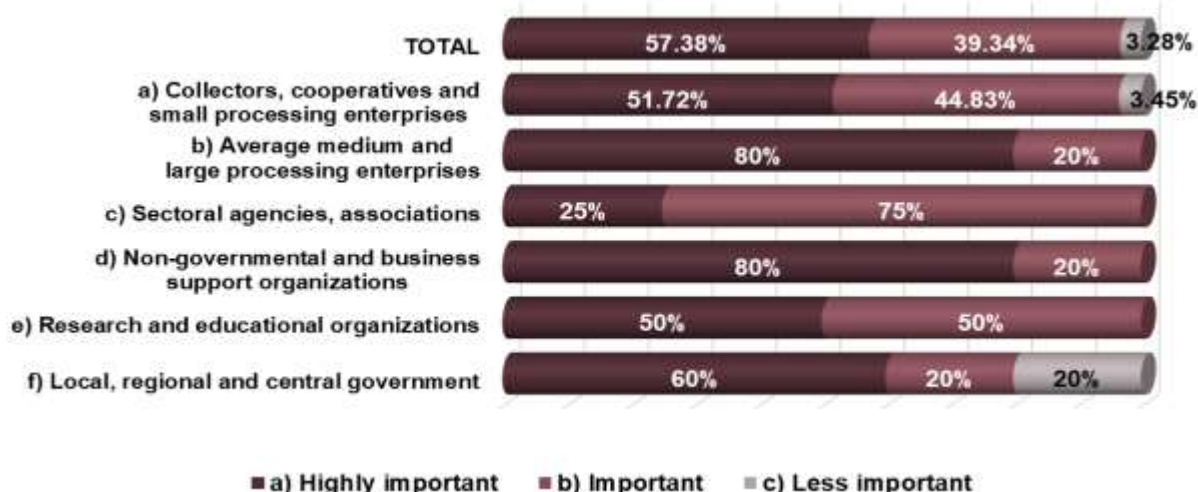
- 80% medium and large processing enterprises and non-governmental and business support organizations;
- 60% of local, regional and central administration representatives;
- about 52% of collection enterprises, cooperatives and small processing enterprises;
- 50% of research and education organizations and
- 25% from sector agencies, associations.

39.3 percent of survey participants indicated that they consider the role of the commercial value-added plants sector important in employing the local population, generating income and developing the local economy. This opinion is shared by:

- 75% of sectoral agencies, associations;
- 50% of research and education organizations;
- 44.8% of collection enterprises, cooperatives and small processing enterprises and
- 20% from medium and large processing enterprises, non-governmental and business support organizations and representatives of local, regional and central government.

At the same time, only 20 percent of local, regional and central administration representatives and 3.5 percent of collection enterprises, cooperatives and small processing enterprises believe that the role of the plant sector with added commercial value in employing the local population, generating income and developing the local economy it's a bit important.

Figure 23: The importance of the role of the commercial value-added plant sector in employing local people, generating income and developing the local economy



### 3.24. How important is the existence of educational and granting programs on herb products?

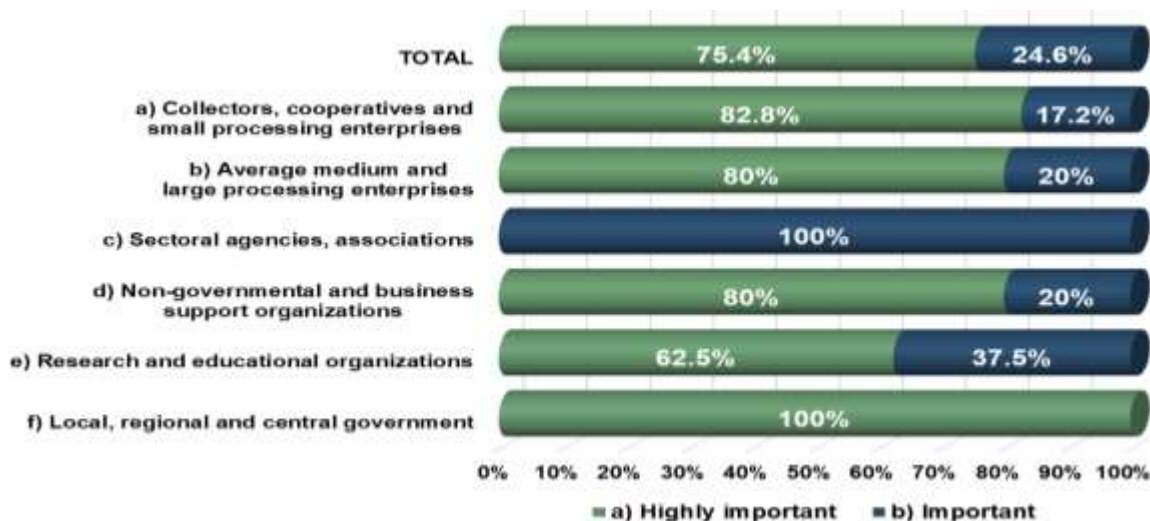
The majority of survey participants (75.4%) consider the existence of educational and grant programs on plant products with added commercial value to be of major importance. (Figure 24) These include:

- 100% of local, regional and central administration representatives;
- about 83% of collection enterprises, cooperatives and small processing enterprises;
- 80% medium and large processing enterprises and non-governmental and business support organizations and
- 62.5% from research and education organizations.

The rest of the respondents (24.6%) believe that the existence of educational and grant programs on plant products with added commercial value is important for the development of the sector. This opinion is shared by:

- 100% of sectoral agencies, associations;
- 37.5% from research and education organizations;
- 20% medium and large processing enterprises and from non-governmental and business support organizations and
- 17.2% from collection enterprises, cooperatives and small processing enterprises.

Figure 24: Importance of educational and grant programs on commercial value-added herbal products



### 3.25. How important is the participation in local and international thematic activities/platforms on herbs?

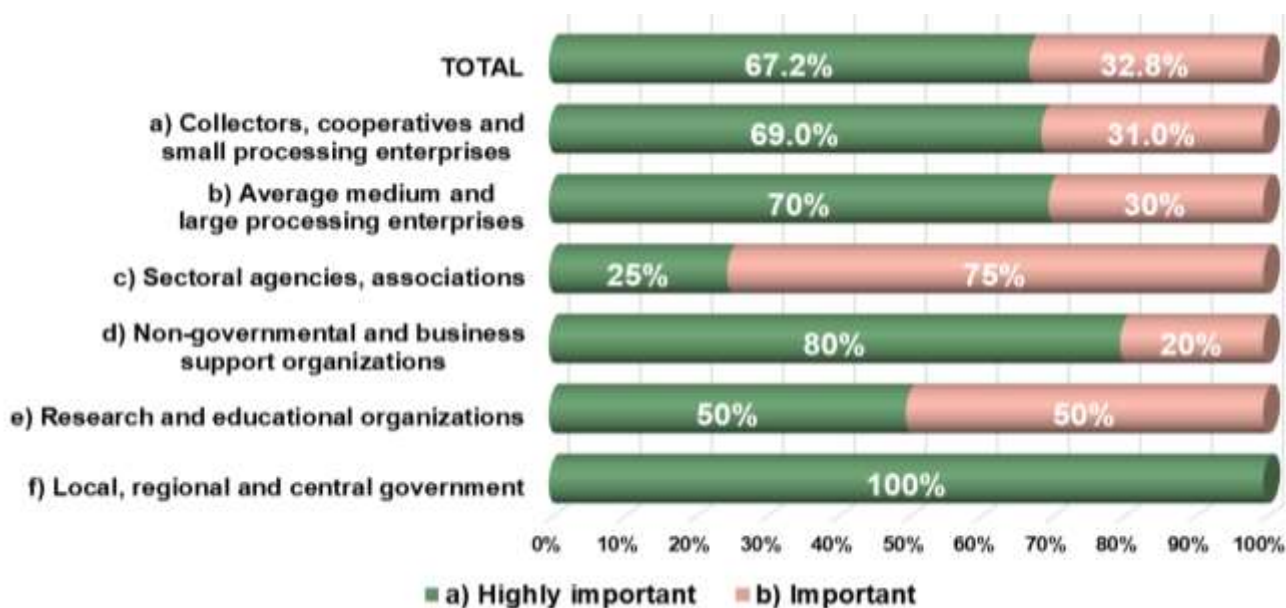
More than half of the survey participants (67.2%) consider participation in local and international thematic activities/platforms in the field of plants with added commercial value to be of major importance. (Figure 25) These include:

- 100% of local, regional and central administration representatives;
- 80% of non-governmental and business support organizations;
- 70% medium and large processing enterprises
- 69% of collection enterprises, cooperatives and small processing enterprises;
- 50% of research and education organizations and
- 25% from sector agencies, associations.

The rest of the respondents (32.8%) consider it important to participate in local and international thematic activities/platforms in the field of plants with added commercial value. This opinion is shared by:

- 75% of sectoral agencies, associations;
- 50% of research and education organizations;
- 31% of collection enterprises, cooperatives and small processing enterprises;
- 30% of medium processing enterprises and
- 20% from research and education organizations.

Figure 25: The importance of participating in local and international thematic activities/platforms in the field of commercial value-added plants



### 3.26. How important is the participation in programs, projects, grants funded by local and international donors to support the development of herb sector?

More than half of the survey participants (67.2%) consider it of major importance to participate in programs, projects, grants financed by local and international donors to support the development of the sector of plants with added commercial value. (Figure 26) These include:

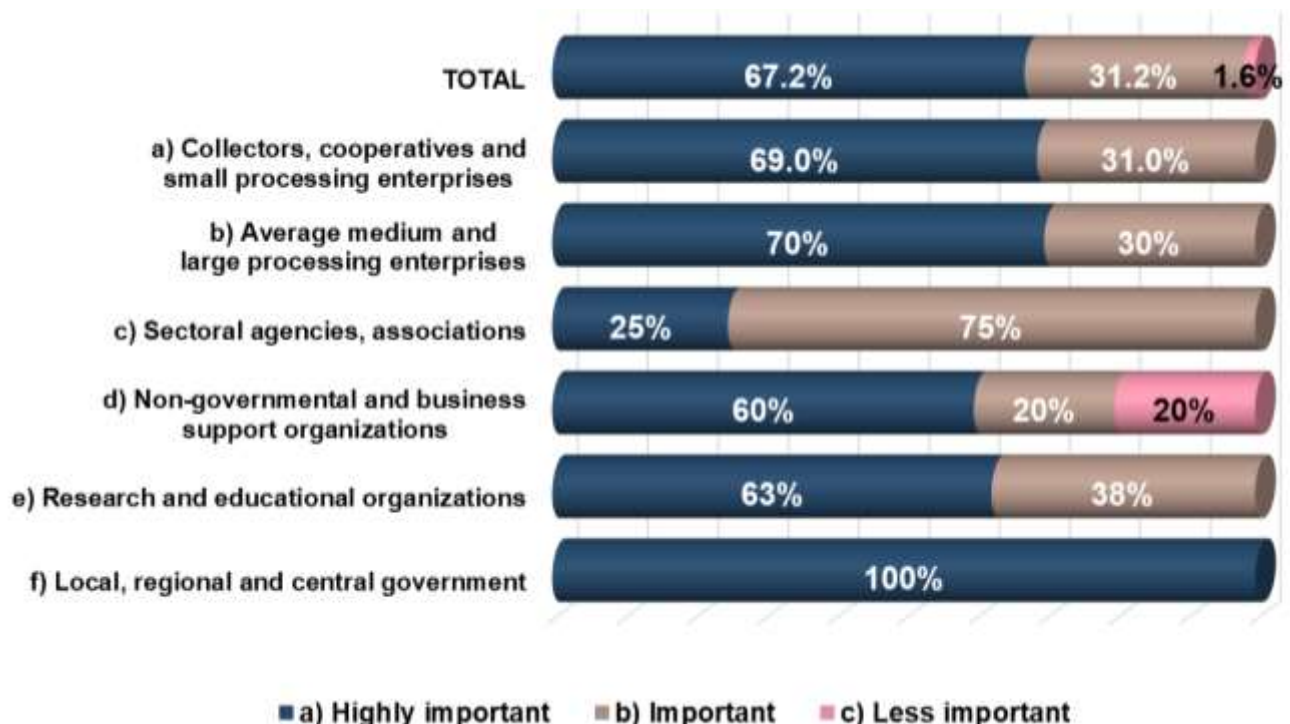
- 100% of local, regional and central administration representatives;
- 70% medium and large processing enterprises;
- 69% of collection enterprises, cooperatives and small processing enterprises;
- 63% of research and education organizations;
- 60% of non-governmental and business support organizations and
- 25% from sector agencies, associations.

31.2 percent of survey participants indicated that participation in programs, projects, grants funded by local and international donors to support the development of the commercial value- added plant sector is important. This opinion is shared by:

- 75% of sectoral agencies, associations;
- 38% of research and education organizations;
- 31% of collection enterprises, cooperatives and small processing enterprises;
- 30% of medium and large processing enterprises and
- 20% from non-governmental and business support organizations.

At the same time, only 20 percent of non-governmental and business support organizations consider that participation in programs, projects, grants financed by local and international donors to support the development of the sector of plants with added commercial value is a little important.

**Figure 26: The importance of participating in programs, projects, grants funded by local and international donors to support the development of the sector of plants with added commercial value**



### 3.27. Are you willing to be involved in the Black Sea Herb Cluster?

The majority of survey participants (72.1%) are willing to get involved in the Black Sea Herb Cluster, 6.6 percent of respondents will not get involved in this activity, and 21.3% still do not have a position clear in this sense. (Figure 27)

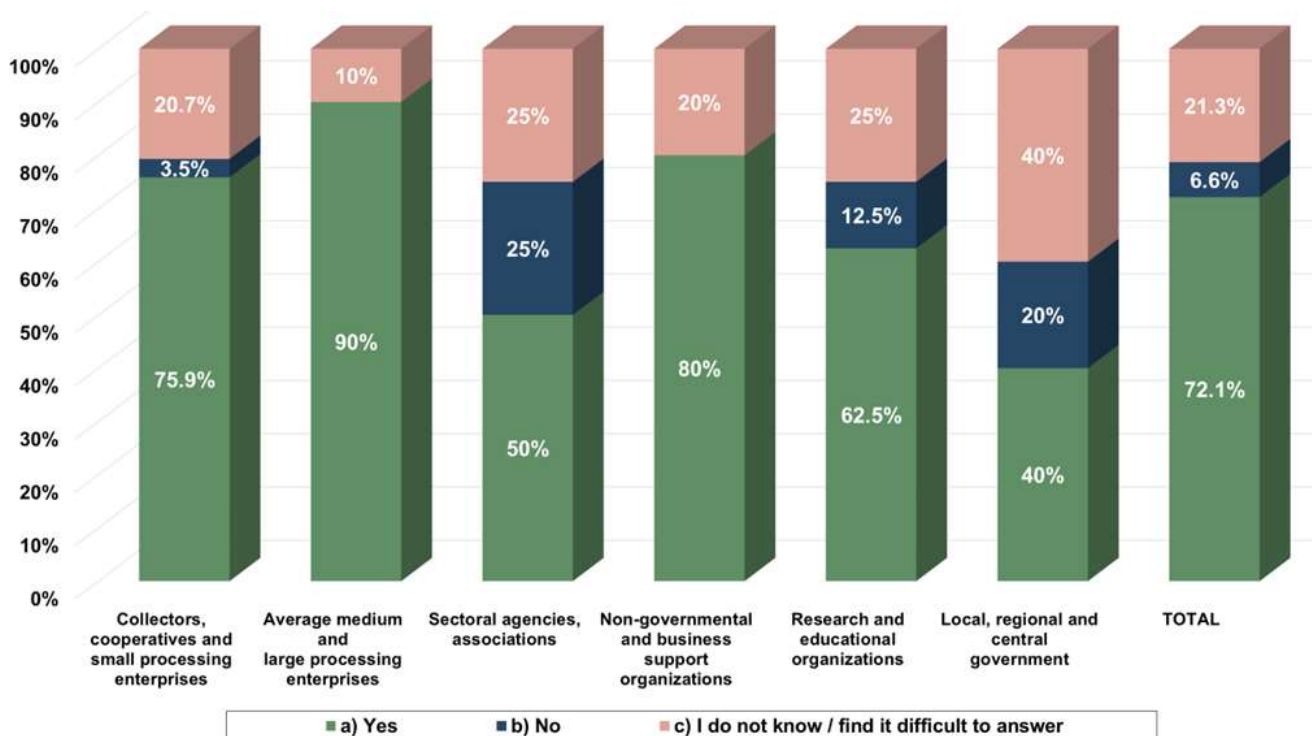
Willingness to engage in the Black Sea Herb Cluster was expressed by all categories of respondents, of which 90% from medium and large processing enterprises, 80% from non-governmental organization respondents and of business support, 76% of collection enterprises, cooperatives and small processing enterprises, 62.5% of representatives of research and education organizations, 50% of sectoral agencies, associations and 40% of representatives of local, regional and central administration.

Our involvement in the Cluster was confirmed by 25% of sectoral agencies, associations, 20% of representatives of local, regional and central administration, 12.5% of representatives of research and education organizations and 3.5% of collection enterprises, cooperatives and small processing enterprises.

At the same time, 40 percent of representatives of local, regional and central administration, 25 percent of representatives of research and education organizations and sectoral agencies, associations, 20 percent of collection enterprises, cooperatives and small businesses are not ready

to make such a decision. Of processing and non-governmental and business support organizations and 10 percent of medium and large processing enterprises.

Figure 27: **Availability of involvement in the Black Sea Herb Cluster**



### 3.28. Please indicate which topic you are most interested in, if you are involved in Black Sea Herb Cluster?

The topic of interest in the case of involvement in the Black Sea Herb Cluster, which accumulated the highest score (mentioned by about 38% of respondents) is Identifying international markets for herbal products, developing commercial relations and finding new business partners (Figure 28 ). This is followed by:

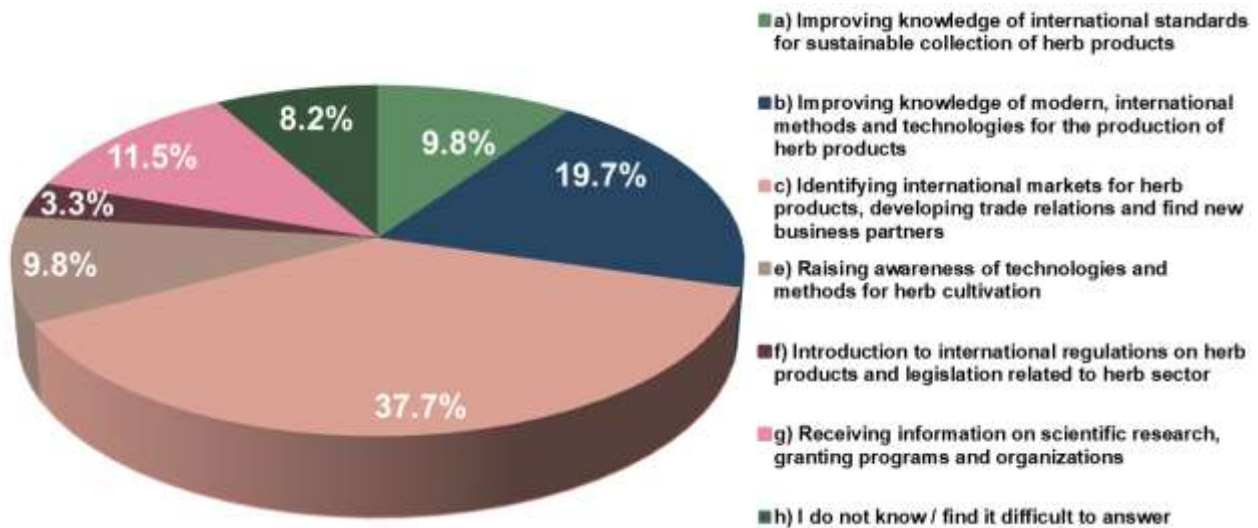
- improving knowledge regarding modern, international methods and technologies for the manufacture of herbal products (indicated by 19.7 percent of respondents);
- information about scientific research, grant programs and organizations active in the field of plants with added commercial value (indicated by 11.5 percent of respondents);
- improving knowledge of international standards for sustainable plant collection and raising awareness of plant cultivation technologies and methods (indicated by 9.8 percent of respondents) and
- introduction to international regulations on plant products and legislation relating to the plant sector with added commercial value (indicated by 3.3 percent of respondents).

Also, 52% of collection enterprises, cooperatives and small processing enterprises, and 50% of medium and large processing enterprises showed increased interest in identifying international markets for plant products, developing trade relations and finding new trading partners. business. Subsequently, with 17 and 20 percent, respectively, this category of respondents opts for improving their knowledge of modern, international methods and technologies for the manufacture of herbal products.

It should be noted that 8.2 percent of the total respondents, 7% from collection enterprises, cooperatives and small processing enterprises, 25% from sectoral agencies, associations, as well as 20% from representatives of local, regional and central administration and 12.5 from research organizations and education did not select any subject from those mentioned in the questionnaire.

At the same time, the topic - raising awareness about different certification standards for herbal products, was not selected by any survey participant

Figure 28: Topics of major interest when engaging in the Black Sea Herb Cluster



### 3.29. Would you like to participate in an e-learning platform on herb products?

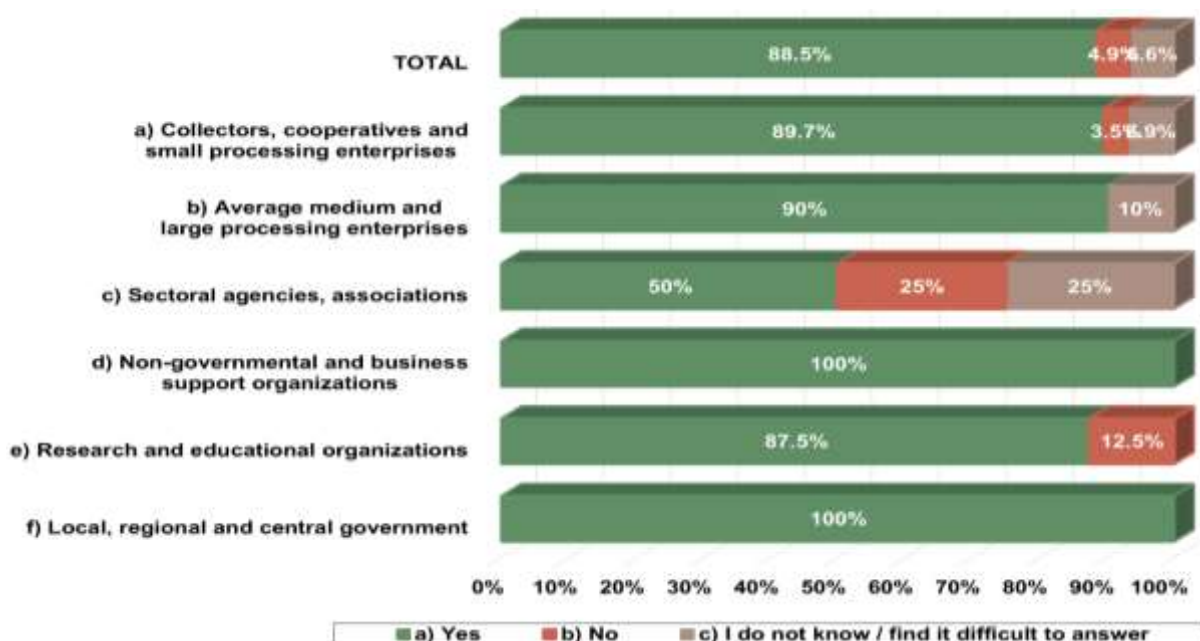
The majority of survey participants (88.5%) are willing to participate in an online training platform about products in the plant sector with added commercial value, 5 percent of respondents will not be part of the platform, and 6.6% still do not have a clear position in this sense. (Figure 29)

Willingness to participate in an online training platform on the products of the commercial value-added plant sector was expressed by all categories of respondents, of which 100% of respondents from non-governmental and business support organizations and representatives of local, regional administration and central, 90% of medium and large processing enterprises and collection enterprises, cooperatives and small processing enterprises, 87.5% of representatives of research and education organizations and 50% of sectoral agencies, associations.

Our involvement in the online training platform was confirmed by 25% of sectoral agencies, associations, 12.5% of representatives of research and education organizations and 3.5% of collection enterprises, cooperatives and small processing enterprises.

At the same time, 25 percent of sectoral agencies, 10 percent of medium and large processing enterprises and 7 percent of collection enterprises, cooperatives and small processing enterprises are not ready to make such a decision.

Figure 29: Interest in participating in an online training platform on products from the commercial value-added plant sector



### 3.30. How important is the development of Black Sea Herb Cluster in order to facilitate the sale of herb products in the international markets and to popularize the herb products produced in Moldova?

More than half of the participants in the survey (62.3% of the respondents) consider the development of the Black Sea Herb Cluster very important for facilitating the commercialization of herbal products on international markets and for popularizing the products of the plant sector with added commercial value produced in Moldova. (Figure 30.1)

The rest of the respondents (37.7%) consider this initiative important. No respondent selected the options c) Slightly important and d) Not important at all.

Figure 30.1: The importance of the development of the Black Sea Herb Cluster for facilitating the commercialization of plant products on international markets and for popularizing products from the plant sector with added commercial value produced in Moldova

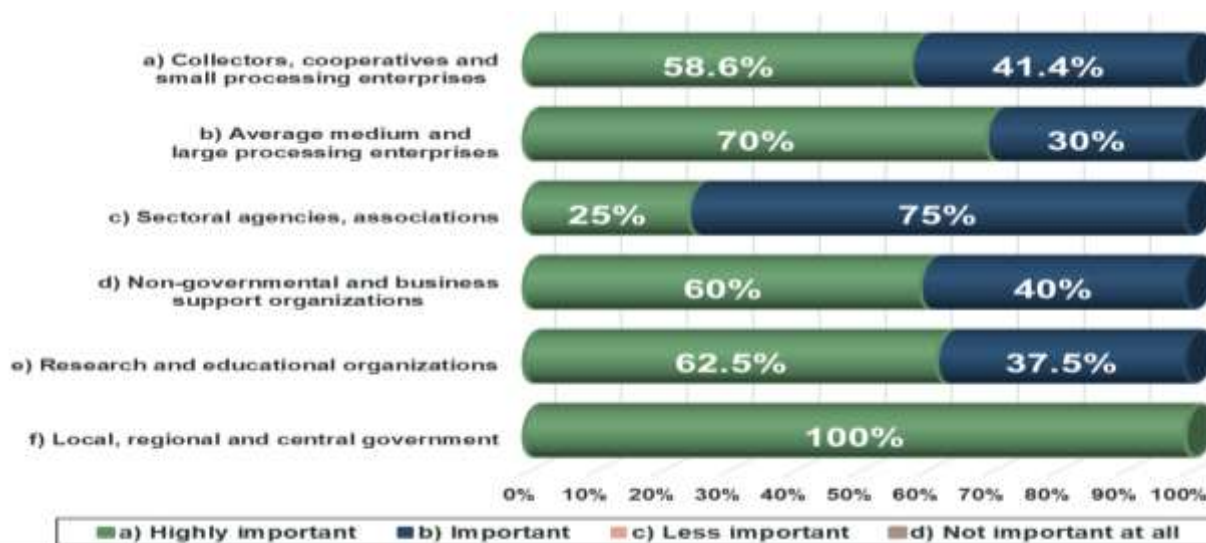


Thus, the respondents of the local, regional and central administration totally opt (100%) for the primary importance of the development of the Black Sea Herb Cluster for facilitating the commercialization of herbal products on international markets and for popularizing the products of the plant sector with added commercial value produced in Moldova.

Also, 70% of medium and large processing enterprises consider the development of the Black Sea Herb Cluster to be of major importance for facilitating the commercialization of herbal products on international markets and for popularizing the products of the plant sector with added commercial value produced in Moldova.

58.6 percent of collection enterprises, cooperatives and small processing enterprises consider the development of the Black Sea Herb Cluster very important for facilitating the commercialization of plant products on international markets and for popularizing products from the plant sector with added commercial value produced in Moldova, and 41.4 of them considers it important. (Figure 30.2)

Figure 30.2: The importance of the development of the Black Sea Herb Cluster for facilitating the commercialization of plant products on international markets and for popularizing products from the plant sector with added commercial value produced in Moldova



## 4. CONCLUSIONS

The survey was attended by 61 respondents from the target groups that carry out activities in the sector of growing, production, promotion and marketing of herbaceous plants (medicinal, aromatic, seasoning) and plant products with added commercial value, including 47.5% - collection companies, cooperatives and small processing enterprises, 16.4% - medium and large processing enterprises, 13.1% - research and education organizations, followed by local, regional and central administration and sectoral agencies, associations (8.2% each), as well as non-governmental organizations and business support (6.6%). The majority of respondents (61%) have been active in the sector for up to 5 years.

At the same time, most survey participants have an average or even weak level of knowledge in the field and face the following main challenges:

- the lack of equipment and services necessary for the collection of raw materials using sustainable methods;
- the low level of knowledge of sustainable raw material collection methods and the lack of relevant activities (training, seminars, etc.);
- lack of information regarding the stocks of raw materials to be collected in the collection areas (region, municipality, forestry);
- lack of qualified personnel, services and/or equipment;
- the low level of knowledge of modern cultivation technologies;
- the lack of relevant educational activities and the high costs of agrotechnical works related to herb cultivation;
- unfavorable climatic phenomena (early and late frosts, drought, hail, strong winds);
- diseases / pests / weeds;
- lack of grant programs to improve processing activities, lack of equipment / space / infrastructure necessary for processing;
- the lack of a marketing strategy, of the necessary sources to promote processed products, of documents certifying the quality and safety of the product;
- lack of information about local and international markets;
- the low level of knowledge of local/foreign consumers about herbal products manufactured in Moldova.

Also, most survey participants require as a priority:

- increasing the capacity of the authorities for efficient management of the sector;
- increasing interest in the sector at national level;
- qualified personnel/experts in the field;
- equipment and services needed to collect raw materials using sustainable methods;
- modern cultivation technologies and relevant educational activities;
- grant programs to improve processing activities, lack of equipment / space / infrastructure necessary for processing;
- marketing strategies;
- information on organic markets and issues related to compliance with the requirements of the organic production standard;
- educational and grant programs on commercial value-added plant products and participation in local and international thematic activities/platforms in the field of commercial value-added plants;
- programs, projects, grants financed by local and international donors to support the development of the sector.

Accordingly, practically all participants in the survey (the majority) consider equally important or very important for the development of the sector, the existence of an association in the sector of plants with added commercial value, an opinion shared by the majority of medium and large processing enterprises, collection enterprises, cooperatives and small processing enterprises non-governmental and business support organizations and research and education organizations and wish to participate in an online training platform on commercial value-added plant products.

Therefore, all respondents consider it important (38 percent) or very important (62 percent) to develop the Black Sea Herb Cluster for facilitating the commercialization of plant products on international markets and for popularizing products from the plant sector with added commercial value produced

in Moldova. In the same vein, the majority of survey participants (72%) are already willing to get involved in the Black Sea Herb Cluster, and 21.3 percent of respondents still do not have a clear position on this sense.

The topics of particular interest in the case of involvement in the Black Sea Herb Cluster, are the identification of international markets for herbal products, the development of commercial relations and finding new business partners; improving knowledge of modern, international methods and technologies for the manufacture of plant products and information on scientific research and grant programs and organizations working in the field of plants with added commercial value.

***The main findings/conclusions related to the collection, processing, cultivation and marketing of plants with added commercial value:***

Survey participants think right **the main challenge related to the collection of raw material of plants with added commercial value**, -*lack of equipment and services needed to collect raw materials using sustainable methods*, followed by the low level of knowledge of sustainable raw material collection methods and the lack of relevant activities (training, seminars, etc.) and the lack of information regarding the raw material stocks to be collected in the collection areas (region, municipality, forestry).

Also, **the main negative factor affecting the yield of commercial value-added plants** indicated by the majority of respondents are *adverse weather phenomena (early and late frosts, drought, hail, strong winds, heavy rainfall, etc.) or natural calamities*, followed by *unsustainable and uncontrolled collection of herbs and pests, diseases and weeds*.

While **the main challenges related to the processing of plant products with added commercial value**, indicated by the majority of respondents are *lack of grant programs to improve processing activities, lack of equipment / space / infrastructure necessary for processing and expenses related to processing costs*.

At the same time, **the main determinants of the quality of commercial value-added plant products**, identified in this survey are *selection of appropriate technological regimes for processing and raw materials collected in a clean ecological environment*, followed by the appropriate conditions (temperature, humidity) in the storage space of the processed plant products and the organoleptic and microbiological characteristics.

In the aspects related to **cultivation of plant products with added commercial value**, the main challenges equally indicated by survey participants are: *lack of qualified personnel, services and/or equipment, the low level of knowledge of modern cultivation technologies and the lack of relevant educational activities and the high costs of agrotechnical works related to the cultivation of herbs*.

The main **negative factor that affects the yield of cultivated plant species**, identified in the survey is "*Adverse climatic phenomena (early and late frosts, drought, hail, strong winds)*", followed by *diseases / pests / weeds, lack of qualified personnel and incompetent agricultural work*.

With reference to **trade/sale of commercial value-added herbal products**, the main **challenge** mentioned by most of the respondents is *the lack of a marketing strategy, the sources necessary to promote the processed products, the documents certifying the quality and safety of the product*, followed by the lack of information about local and international markets and the low level of knowledge of local/foreign consumers about herbal products manufactured in Moldova.

***The main findings/conclusions related to the level of knowledge of the respondents regarding the collection, processing, cultivation and marketing of plants with added commercial value:***

The vast majority of survey participants rate their **level of knowledge regarding the collection of plants with added commercial value** equally as being *average, satisfactory or poor* (indicated by at least 20 percent of respondents in each category). Only 6.6 percent of the participants consider themselves to have a high level of knowledge in the field, the majority of which are from the category of research and education organizations and sector agencies, associations and medium and large processing enterprises.

**The level of knowledge regarding the processing of plant products with added commercial value**, most respondents rate it as *average, followed by satisfactory and less than poor level*. At

the same time, only 10 percent of the participants consider that they have a high level of knowledge in the field, the majority of which are from the category of research and education organizations, sector agencies, associations and medium and large processing enterprises.

As in the case of collecting plants, respondents equally appreciate **his level of knowledge regarding the cultivation of commercial value-added plant products**, as average or satisfactory, and less than poor. Only 9.8 percent of respondents consider themselves to have a high level of knowledge in the field, the majority of which are from research and education organizations, sector agencies, associations and non- governmental and business support organizations.

Also, most respondents equally believe that they have a **level of knowledge on trade/sale of commercial value-added herbal products** *average, satisfactory or poor* and only 8 percent of participants consider themselves to have a high level of knowledge in the field, the majority of which are from the category of non-governmental and business support organizations, sector agencies, associations and medium and large processing enterprises.

### ***The main findings/conclusions related to the organic certification of plant products with added commercial value***

The main challenges related to organic certification of commercial value-added plant products, mentioned equally by the majority of respondents, are: low awareness of local/foreign consumers about the products, lack of information about organic markets and problems related to compliance with the requirements of the organic production standard.

Most respondents believe that **organic certification allows products to be sold at a higher price** and only 16.4 percent do not support this position. The most skeptical turned out to be the representatives of non-governmental and business support organizations.

Also, the vast majority of survey participants believe that **organic certification facilitates access to export markets for organic products**, and only 8 percent of respondents (about 20 percent of representatives of sectoral agencies, associations, medium and large processing enterprises and non- governmental and business support organizations) disagree.

At the same time, most of the respondents consider that they have one *weak level of knowledge about the biocertification of commercial value-added plant products*, followed by those with medium and satisfactory level. Only 13.1 percent of participants consider themselves to have a high level of knowledge in the field, the majority of which are from research and education organizations, non-governmental and business support organizations, and collection enterprises, cooperatives, and small processing enterprises.

### ***The main findings/conclusions related to the regulation and management of the commercial value- added plants sector***

Half of respondents **are familiar with existing national legislation on commercial value-added herbal products**. Most of them include representatives of local, regional and central administration, medium and large processing enterprises, research and education organizations and sectoral agencies and associations. At the same time, from the other half of the survey participants who are not familiar with the legislation in the field, they are the majority collection enterprises, cooperatives and small processing enterprises, and non-governmental and business support organizations.

Half of the survey participants believe that **the sector of plants with added commercial value in Moldova is managed ineffective**. This opinion is shared by the majority of respondents of local, regional and central administration, medium and large processing enterprises, collection enterprises, cooperatives and small processing enterprises and sectoral agencies, associations. At the same time, a good part of the respondents believe that the sector is not managed at all and only 6 percent of the respondents claim that the sector is managed efficiently or very efficiently.

At the same time, with few exceptions (8 percent), practically all survey participants consider equally, *important or very important* **the role of the government in the development of the**

**sector of plants with added commercial value in Moldova.** Only 5 percent of respondents consider it of minor importance, and one percent - not at all important.

### ***The main findings/conclusions related to general aspects of the commercial value-added plants sector***

**The main challenge in the sector of plants with added commercial value in Moldova,** mentioned by most of the respondents and partly by collection companies, cooperatives and small processing companies and medium and large processing companies, constitutes *lack of educational programs and grants*. They were mentioned as challenges of increased importance *low interest in the sector at national level* and lack of qualified staff/experts in the field.

With the exception of 5 percent of the respondents, the survey participants (the majority) think equally *important or very important for the development of the sector*, **the existence of an association in the sector of plants with added commercial value**. This opinion is shared by the majority of respondents from medium and large processing enterprises, collection enterprises, cooperatives and small processing enterprises, non-governmental and business support organizations, and research and education organizations.

Also, practically all respondents consider *important or very important* **the role of the commercial value-added plant sector in local employment, income generation and local economic development**. Only 3 percent of the survey participants, representatives of local, regional and central administration and collection enterprises, cooperatives and small processing enterprises consider the role of the sector in this sense of minor importance.

### ***The main findings/conclusions related to the mechanisms for strengthening and supporting the sector of plants with added commercial value***

All survey participants consider *important or very important* **the existence of educational and grant programs on commercial value-added herbal products and participation in local and international thematic activities/platforms in the field of commercial value-added plants**.

Also, the great majority of the respondents consider of *major importance* **participation in programs, projects, grants funded by local and international donors to support the development of the plant sector with added commercial value**. Only 1.6 percent of respondents (representatives of non-governmental and business support organizations) consider this activity of minor importance.

Appropriately, most of the survey participants *wish to participate in an online training platform on the products of the commercial value-added plant sector* and only 5 percent of respondents (sectoral agencies, associations, and representatives of research and education organizations) are not willing to become part of such a platform.

### ***The main findings/conclusions related to the involvement of actors of the sector of plants with added commercial value in the Black Sea Herb Cluster***

Most survey participants *they are willing to be involved in the Black Sea Herb Cluster*, 21.3 percent of respondents still do not have a clear position in this regard and only 6.6 percent of respondents (sectoral agencies, associations, representatives of local, regional and central administration, research and education organizations and enterprises of collection, cooperatives and small processing enterprises) are not willing to engage in this activity.

**The subject of interest in the event of involvement in the Black Sea Herb Cluster**, which accumulated the highest score is *Identifying international markets for herbal products, developing commercial relationships and finding new business partners*, followed by: improving knowledge on modern, international methods and technologies for the manufacture of herbal products and information on scientific research, granting programs and organizations working in the field of plants with added commercial value and less improving knowledge on international standards for the sustainable collection of plants and raising awareness of plant breeding technologies and methods.

It should be noted that all respondents consider *important (38 percent) or very important (62 percent)* **the development of the Black Sea Herb Cluster to facilitate the commercialization of plant products on international markets and to popularize products from the plant sector with added commercial value produced in Moldova**.

## HEGO questionnaire

The Chamber of Commerce and Industry of the Republic of Moldova (CCI of the Republic of Moldova) invites you to participate in the Research Survey of the sector of growth, production and promotion of herbaceous plants and plant products in the Republic of Moldova. The aim of the survey is to develop the concept and the set of tools for the creation of a Cluster in the sector of herbaceous plants (medicinal, aromatic, seasoning) and plant products with added commercial value.

The general objective of the consultation activity of the target groups involves the accumulation of information about: the competences, needs and expectations of the actors in the field, as well as the opportunities for the development of the Cluster.

The results of the survey will be presented at a meeting during September, about which we will inform you further.

We will greatly appreciate your contribution to the development of this important sector in the RM economy.

The CCI of the Republic of Moldova carries out this activity in partnership with the Organization for the Development of Entrepreneurship - ODA, within the framework of the implementation of the project "HEGO - plants for economic growth" implemented in Greece, Armenia, the Republic of Moldova and Georgia.

**1. Please indicate which target group of the herb sector you belong to? (Provide only one answer).**

- a) Collectors, cooperatives and small processing enterprises;
- b) Local, regional and central government;
- c) Sectoral agencies, associations;
- d) Non-governmental and business support organizations;
- e) Research and educational organizations;
- f) Medium and large processing enterprises.

**2. Please indicate the period of your involvement in herb sector?**

- a) 1-5 years
- b) 5-10 years
- c) More than 10 years

**3. Please name the main challenge related to the collection of commercially valuable herbs' raw materials? (Provide only one answer).**

- a) Low quality characteristics of collected raw materials (biochemical and / or microbiological).
- b) Low level of awareness regarding the collection of raw materials with sustainable methods and lack of relevant educational activities (trainings, seminars, etc.).
- c) Lack of information on stocks of raw materials to be collected in collection areas (region, municipality, forestry).
- d) Regulations, prohibitions and permissions related to the collection of raw materials.
- e) Lack of equipment and services required for the collection of raw materials using sustainable methods.
- f) I do not know / find it difficult to answer.

**4. Please indicate the main negative factor affecting the yield of commercially valuable herb products? (Provide only one answer).**

- a) Adverse natural-climatic events (early and late frosts, drought, hail, strong winds, heavy rainfall, etc.).
- b) Unsustainable and uncontrolled extraction of herbs.
- c) Uncontrolled grazing / forestry activities / tourism activities / agriculture.
- d) Pests, diseases and weeds.
- e) I do not know / find it difficult to answer

**5. How would you assess your level of knowledge regarding the sustainable collection of commercially valuable herbs' raw materials?**

- a) High
- b) Average
- c) Satisfactory

- d) Low
- e) I do not know / find it difficult to answer.

**6. Please indicate the main challenge related to the processing of commercially valuable herb products?** (Provide only one answer).

- a) Outdated and depreciated machinery.
- b) Lack of equipment / space / infrastructure required for processing.
- c) Lack of information on modern and cost-effective processing technologies.
- d) Expenses related to processing costs.
- e) Lack of granting programs to improve processing activities.
- f) I do not know / find it difficult to answer.

**7. Please name the main determinant of the quality of commercially valuable processed herb products?** (Provide only one answer).

- a) Organoleptic and microbiological characteristics.
- b) Raw materials collected in ecologically clean environment.
- c) Selection of appropriate technological regimes for processing.
- d) Existence of appropriate conditions (temperature, humidity) in the warehouse space for processed herb products.
- e) I do not know / find it difficult to answer.

**8. How would you assess your level of knowledge regarding the processing of commercially valuable herb products?**

- a) High
- b) Average
- c) Satisfactory
- d) Low
- e) I do not know / find it difficult to answer.

**9. Please name the main challenge related to trade / sale of commercially valuable herb products?**

- a) Lack of information on local and international target markets.
- b) Low selling prices.
- c) Competition in international markets.
- d) High costs related to the sale of products in local / foreign network markets.
- e) Low level of awareness of local / foreign consumers about herb products produced in Moldova.
- f) Lack of marketing strategy, sources necessary for promotion of processed products, documents certifying product quality and safety.
- g) I do not know / find it difficult to answer.

**10. How would you assess your level of knowledge regarding the trade / sale of commercially valuable herb products?**

- a) High
- b) Average
- c) Satisfactory
- d) Low
- e) I do not know / find it difficult to answer.

**11. Please name the main challenge related to bio-certification of commercially valuable herb products** (Provide only one answer).

- a) High costs associated with bio-certification.
- b) Low level of awareness of local / foreign consumers about organic products.
- c) Problems related to compliance with the requirements of the organic production standard.
- d) Lack of information on organic markets.
- e) I do not know / find it difficult to answer.

**12. Does organic certification allow products to be sold at a higher, premium price?**

- a) Yes
- b) No
- c) I do not know / find it difficult to answer.

**13. Does organic certification facilitate access to export, niche, organic products markets?**

- a) Yes
- b) No
- c) I do not know / find it difficult to answer.

**14. How would you assess your level of knowledge regarding the bio-certification of commercially valuable herb products?**

- a) High
- b) Average
- c) Satisfactory
- d) Low
- e) I do not know / find it difficult to answer.

**15. Please name the main challenge related to the cultivation of commercially valuable herb products** (Provide only one answer).

- a) Lack of qualified staff, services and / or equipment.
- b) Lack of high-quality seed, seedling and nursery materials in the local market.
- c) High costs of Agro-technical works related to herbs cultivation.
- d) Low level of awareness of modern cultivation technologies and lack of relevant educational activities.
- e) I do not know / find it difficult to answer.

**16. Please indicate the main negative factor affecting the yield of cultivated herb species** (Provide only one answer).

- a) Low quality of seed, seedling and nursery material.
- b) Adverse climatic events (early and late frosts, drought, hail, strong winds).
- c) Diseases / pests / weeds.
- d) Lack of qualified staff.
- e) Incompetently performed Agro-technical works.
- f) I do not know / find it difficult to answer.

**17. How would you assess your level of knowledge regarding the cultivation of commercially valuable herb products?**

- a) High
- b) Average
- c) Satisfactory
- d) Low
- e) I do not know / find it difficult to answer.

**18. Please name the main challenge in the herb sector of Moldova?** (Provide only one answer).

- a) Lack of qualified staff / experts in the sector.
- b) Lack of educational and granting programs.
- c) Low interest in the sector at the national level.
- d) Low effectiveness of relevant legislation and / or regulations.
- e) Lack and / or shortage of information on resource stocks.
- f) I do not know / find it difficult to answer.

**19. How effectively do you think the herb sector of Moldova is managed?**

- a) Highly effective
- b) Effectively
- c) Inefficiently
- d) Not managed at all
- e) I do not know / find it difficult to answer.

**20. Are you familiar with existing national legislation on herb products?**

- a) Yes
- b) No

**21. How important is the role of the government in the development of herb sector in Moldova?**

- a) Highly important
- b) Important
- c) Less important
- d) Not important at all.

**22. How important is the existence of herb products association for the development of the sector?**

- a) Highly important
- b) Important
- c) Less important
- d) Not important at all.

**23. How important is the role of herb sector in employment of local population, income generation and developing the local economy?**

- a) Highly important
- b) Important

- c) Less important
  - d) Not important at all.
- 24. How important is the existence of educational and granting programs on herb products?**
- a) Highly important
  - b) Important
  - c) Less important
  - d) Not important at all.
- 25. How important is the participation in local and international thematic activities/platforms on herbs?**
- a) Highly important
  - b) Important
  - c) Less important
  - d) Not important at all.
- 26. How important is the participation in programs, projects, grants funded by local and international donors to support the development of herb sector?**
- a) Highly important
  - b) Important
  - c) Less important
  - d) Not important at all.
- 27. Are you willing to be involved in the Black Sea Herb Cluster?**
- a) Yes
  - b) No
  - c) I do not know / find it difficult to answer.
- 28. Please indicate which topic you are most interested in, if you are involved in Black Sea Herb Cluster? (Provide only one answer).**
- a) Improving knowledge of international standards for sustainable collection of herb products.
  - b) Improving knowledge of modern, international methods and technologies for the production of herb products.
  - c) Identifying international markets for herb products, developing trade relations and find new business partners.
  - d) Raising awareness of different standards for certification of herb products.
  - e) Raising awareness of technologies and methods for herb cultivation.
  - f) Introduction to international regulations on herb products and legislation related to herb sector.
  - g) Receiving information on scientific research, granting programs and organizations.
  - h) I do not know / find it difficult to answer.
- 29. Would you like to participate in an e-learning platform on herb products?**
- a) Yes
  - b) No
  - c) I do not know / find it difficult to answer.
- 30. How important is the development of Black Sea Herb Cluster in order to facilitate the sale of herb products in the international markets and to popularize the herb products produced in Moldova?**
- a) Highly important
  - b) Important
  - c) Less important
  - d) Not important at all.