Estonian land lives and nourishes!

Food, agriculture, rural affairs, fisheries
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Preface

Agriculture, fisheries, food production, and culture are all important parts of the Estonian identity. They have a significant part in shaping the Estonian general image. Approximately 150,000 people work in rural areas, comprising about 20% of total employment. Both small and large-scale businesses contribute to the development of rural economy.

As customary to Nordic countries, the Estonian food and food culture values a fresh, natural, and versatile selection. Close attention is given to food safety, animal health, and animal welfare. The quality of food and local origin of raw materials is considered very important. Food safety is monitored by both its manufacturers as well as processors. Intense supervision guarantees the high quality of food produced and consumed in Estonia as well as of imported and exported food.

The rural area is a great place to live when residents can count on well-paid jobs and suitable challenges. The accessibility of services, a beautiful and well-preserved environment, and social interaction are also important. The legacy and traditions of our ancestors must be preserved in rural areas while also adapting to the changes of everyday life. By 2030, life in rural areas will be of high value and reputation, a home to active people and cooperative communities. There is room for both small and large-scale businesses who will develop the rural economy together.

The quality of raw materials, sustainable use of food, and agricultural production is increasingly more important. Feed, seeds, and propagating material must have a high quality and be used skilfully. We must also keep in mind soil protection and ensure that plant nutrition and propagating material are superior. We must also manage fish resources in a sustainable manner.

The prerequisite for maintaining global competition is the high quality, innovation, and environmental sustainability of our products. We must cooperate more, apply the latest scientific discoveries and the best technologies. Estonia is highly self-sufficient in many sectors, enabling us to provide Estonian citizens with local food, but also transport our products abroad, thus increasing our competitiveness.

A knowledgeable producer and consumer is at the heart of a flourishing and functioning rural life. He or she is a smart,
well-paid, and motivated person, who values home, communi-
ty and private property in the rural area and enjoys operating in a clean environment. The more people live in rural areas, the more secure is the security of our nation.

We aim to value Estonian food and create a good life in rural areas.

**ESTONIAN FOOD IS SAFE AND PRODUCED IN AN ENVIRON-
MENTALLY SUSTAINABLE WAY**

Agriculture, fisheries, and food production cover a large part of Estonia’s territory and have a significant impact on the landscape of Estonia.

Sustainable production is becoming more popular in the whole world, including Estonia. Consumers are turning to organic production; the number of organic farmers is increasing and the area that is used for organic farming is constantly growing. Agricultural area in Estonia forms 1,002,234 hectares, of which 679,000 hectares is arable land. 21% or 210,033 hectares of all agricultural area was under organic production in 2018, making us the front runners in the European Union; the register of organic farming includes 1,948 organic holdings.

Alongside the constantly expanding organic farmland, the proportion of organic production in the agriculture sector has also increased and the export of organic production has almost doubled in the last three years. In 2017, organic production constituted 9% of the total agricultural production.

Organic products is increasingly more applied in child care institutions. In 2018, organic food was offered in 15 schools and kindergartens.

The Veterinary and Food Board and the Agricultural Board are constantly monitoring all organic production, guaranteeing its credibility.

In 2018, there were approximately 168 organic food processors, most of them small businesses. All main food groups were processed – dairy, meat, cereals, berries, fruit and vegetables, and herbs. Most processors handled fruit, vegetables, and berries as well as cereals and legumes.
Organic farmers and the area of organic farmland in 1999–2018

Source: the organic farming register

Organic food processors in 2012–2018

Source: the organic farming register

Total production and export of organic products in 2013–2017 (million euros)

Sources: the Farm Accountancy Data Network (FADN, total production), Kantar EMOR (export 2013), the Estonian Institute of Economic Research (export 2015, 2017)
Organic production is labelled accordingly

Labels that designate organic products: the EU organic logo and the Estonian national organic label

Organic labels that designate organic catering companies

Estonia prioritises food safety, the health and well-being of animals, and using local raw materials

Food safety in the European Union is at a high level. The safety and quality of food as well as the health and well-being of animals is prioritised in food production, along with preferring local raw materials. All animal keepers benefit from healthy animals who provide high-quality products. Livestock farming requirements guarantee the well-being of animals.

The main objective is to guarantee high-quality human health care and protect the interests of consumers within the entire food supply chain (feed, livestock farming, plant production, processing, storing, retail, etc.). Food producers, processors, sellers, and other instances in the chain that starts on the field and ends with the consumers contribute to the safety of food. The Veterinary and Food Board monitors food safety requirements.

As at 1 January 2018, the Veterinary and Food Board was monitoring over 15,000 companies that process food. The number of companies in this field has continuously increased in the last three years (with an average annual growth of 7.5%). The number of small businesses who use local raw materials has increased the most.

Estonia aims to keep the number of food-borne infections below 200 cases a year. Beneficial conditions are maintained
by an efficient monitoring system that has so far proven the compliance of nearly 100% of samples taken.

Consumers have an important role: they must be aware of the possible risks that accompany food. They must know how to prepare and consume food in a healthy way (e.g. wash hands, store food at the correct temperatures, etc.). Information on food labelling is explained at www.toidumärgistus.ee and information on food safety is available at www.toiduteave.ee.

Food package labelling helps to make wise choices when buying food as it provides information on ingredients, preservation, origin, and other important factors.

**Agricultural production is the key to success**

In 2018, the total value of agricultural production was 856 million euros. Nearly half of it (49%) came from livestock farming, plant production constituted 40%, and other activities made up 11%. Main industries were dairy production (28% of total production) and the production of cereals and oil crop (18%).

**Distribution of total agricultural production in 2018**

*Source: Statistics Estonia*

*Photo: Rita Nuiamäe*
### Important indicators in 2018

<table>
<thead>
<tr>
<th>Category</th>
<th>Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cattle</td>
<td>251,000</td>
</tr>
<tr>
<td>Including dairy cattle</td>
<td>86,400</td>
</tr>
<tr>
<td>Pigs</td>
<td>290,500</td>
</tr>
<tr>
<td>Sheep and goats</td>
<td>78,300</td>
</tr>
<tr>
<td>Horses</td>
<td>5,700</td>
</tr>
<tr>
<td>Commercial poultry</td>
<td>2,109,300</td>
</tr>
<tr>
<td>Bee colonies</td>
<td>49,000</td>
</tr>
<tr>
<td>Cereal production</td>
<td>920,900 tonnes</td>
</tr>
<tr>
<td>Cereal growing area</td>
<td>350,430 ha</td>
</tr>
<tr>
<td>Meat production (live weight)</td>
<td>112,993 tonnes</td>
</tr>
<tr>
<td>Dairy production</td>
<td>807,500 tonnes</td>
</tr>
<tr>
<td>Honey production</td>
<td>1,253 tonnes</td>
</tr>
<tr>
<td>Egg production</td>
<td>206,600,000 pcs</td>
</tr>
<tr>
<td>Fishing</td>
<td>87,250 tonnes</td>
</tr>
<tr>
<td>The average yield of cereals</td>
<td>~2,625 kg/ha</td>
</tr>
<tr>
<td>The average milk production per cow</td>
<td>~9,330 kg</td>
</tr>
</tbody>
</table>

*Source: Statistics Estonia*
Estonian food is trustworthy

Estonians love and trust homegrown food – it is tasty, fresh, and of high quality. The assortment of homegrown food has increased over the years and the selection of Estonian production exceeds the assortment of imported goods for many product groups in stores. A 2018 survey of the Estonian Institute of Economic Research shows that 74% of Estonian consumers prefer local food.

![Preference of local food among Estonian citizens in 2008–2018, %](image)

**Source:** the Estonian Institute of Economic Research

The school scheme programme promotes healthy nutrition

Schools and kindergartens are provided support to offer fruit, vegetables, and milk and dairy products to shape the healthy eating habits of children. It also helps to raise their awareness on the role of agricultural and food sector as food providers.

In the 2017/2018 academic year, 697 Estonian educational institutions participated in the fruit and vegetable school scheme, providing fruits and vegetables to 118,535 students. During the same period, 809 educational institutions participated in the milk scheme, offering milk to 198,180 students.

![Photo: the European Commission](image)
Life in rural areas flourishes if people have well-paid jobs, high-quality infrastructure, and a versatile living environment. The state can help by creating a living environment that is appealing for settling down and starting a business, where people are open to new ideas and solutions, but still preserve the legacy of their ancestors. The state must make the living and business environment attractive in rural areas. In 2018, a total of 131,650 businesses operated in Estonia; 27% of them, i.e. 35,157 businesses, were located at rural areas. This number has slowly increased over time.

Of all the most important food groups, Estonia can self-produce cereals and dairy (194% and 175% of the level of self-sufficiency, respectively). Estonian beef production is almost at a full self-sufficiency level (95%). Pork, poultry, vegetables, and fruit have not reached self-sufficiency levels and have room for further improvement.

Level of self-sufficiency of the main foods in 2012–2017

Source: Statistics Estonia
The Estonian Rural Development Plan enhances development

The Estonian rural development policy is part of the European Union’s common agricultural policy (CAP). During the period 2014–2020, the Estonian rural development policy is part of the EU’s common strategic framework together with the European Regional Development Fund, the European Social Fund, the Cohesion Fund and the European Maritime and Fisheries Fund. The Ministry of Rural Affairs allocates the resources through the Estonian Rural Development Plan. The Rural Development Plan for 2014–2020 has six main priorities: innovation and knowledge transfer; improvement of the competitiveness and viability of farms; food chain organisation and sustainable food production; ecosystems related to agriculture and forestry; promotion of resource efficiency and reduction of CO$_2$ emissions; and promotion of social inclusion, poverty reduction and economic development in rural areas. In total, the development plan includes over 20 (sub) measures. In 2018, a total of 311.9 million euros was paid to support the development of agriculture, the food industry, and rural development.

The distribution of support granted under the rural development plan by county in 2007–2019

Sources: the Ministry of Rural Affairs, the Agricultural Registers and Information Board
Life in rural areas is advanced by strong and active communities and young leaders

For a continuous and sustainable rural development, we must improve the motivation of young people, make living and working at rural areas appealing for them, and guarantee a suitable living and business environment in rural areas. We must continue to support generation renewal in the agricultural sector and involve young people in agricultural activities.

Young farmers began to receive support in 2007–2013, when 846 new young farmers started in the sector. New crop and livestock farmers received the most support (not including dairy farmers). The support will continue in 2014–2020, because the proportion of 65-year-old or older managers in the Estonian agricultural sector continues to exceed the proportion of their younger counterparts. In 2018, 50–74-year-olds constituted the biggest age group for producers in the agricultural, forestry, and fisheries sectors with approx. 45%, whereas the proportion of 15–24-year-olds was only approx. 9%.

The main objective of the support is to help young farmers begin in the agricultural field, enhance generation renewal in agriculture, and raise the number of farmers with contemporary knowledge and experience. By the end of 2018, a total of 224 entrepreneurs had received support from the budget for 2014–2020. A third of the support was granted to young cereal farmers.
Leader: a plan for an active community

The LEADER Local Development Strategy is a plan for an active community. The main element of a Leader-type approach is assembling local activity groups from public and private sectors who would prepare regional development strategies. Developing and applying the strategies is based on the local initiative principle.

By 2019, the Leader approach had approved nearly 2,500 projects with a total sum exceeding 48 million euros. The Leader-projects are mostly focused on developing regionally important fields and solving deficits. Microbusinesses received over 90% of the total support.

Projects are mapped at [www.maainfo.ee](http://www.maainfo.ee) under the ‘Visible Leader’ section to make them more approachable for everybody. Among other things, it lists the projects that enhance the development of the local food network and food production, farmer’s markets, handicraft shops, fitness trails, and many more useful societal initiatives.

More information on the Leader-type approach is available on the website of the Ministry of Rural Affairs ([www.agri.ee/leader](http://www.agri.ee/leader)).
Enhancing the export of refined products

In order to create comfortable living conditions in rural areas and maintain the Estonian food production, all products must be refined, marketed, and exported. Refining more raw materials on site guarantees a larger and more stable income from export for entrepreneurs. Refining local crop also equals a larger contribution to employment and tax revenue.

The estimated export of crop and food manufactured or processed in Estonia was 869 million euros. The largest contribution came from the dairy sector (21%), followed by cereals (12%) and fish (10%).

The prices of raw materials on the global market are constantly changing, making the income of exporters unstable. For the state, refining local crop on site equals a larger contribution into employment and tax revenues. The wider the selection of accessible target markets, the more efficiently can enterprises react to the changing demand and decrease the business risk if one market should become devoid.

In order to enhance export and increase the export of refined products, the Ministry of Rural Affairs prepared the ‘Strategy for developing export in the Estonian food sector, 2019–2022’.

The Estonian crop and food export has strengthened its global position each year. In recent years, food has been exported...
to over a hundred target markets. At the same time, a major part of export has been oriented towards the EU internal market – in 2018, a total of 82% of the export turnover (713 million euros) came from exporting to other Member States of the European Union.

The largest export values are cereals, fish, alcohol, and dairy. The main target countries outside of the EU are Norway, Saudi Arabia, Ukraine, the United Arab Emirates, Russia, and China. In 2018, crop and food export to third countries amounted to 157 million euros, comprising 18% of the total export.

Target countries of Estonian crop and food in 2018

Source: the Ministry of Rural Affairs
SUSTAINABLE FISHING

The Estonian fisheries sector is competitive and of high quality; we have good conditions for producing fisheries and aquaculture products. Fisheries is a field with long traditions and Estonian fishermen and fisheries businesses have thorough professional knowledge and experience. Thanks to them, we can enjoy fresh and high-quality local fish. For a sustainable harvest and fishing, we must manage fish resources economically.

Professional fishing

Fishing vessels flying the national flag of the Republic of Estonia are authorised to fish in three regions: the Spitsbergen, the Northwest Atlantic, and the Northeast Atlantic. Fishing fleets carry trawls for the initial or final processing of fish or shrimp. The Estonian state register includes five fishing vessels that belong to three enterprises.

The trawl sector on the Baltic Sea has significantly reduced its fishing capacity in the last decade to respond to existing resources. In 2018, Estonian 25 enterprises of the sector owned a total of 31 fishing vessels. The yearly fishing capacity was up to 50,000 tonnes of sprat and Baltic herring.

The number of coastal fishermen who operate on the Baltic Sea has remained relatively stable in the last decade, without showing signs of development. In Estonia, the number of fishermen who are authorised to fish in the coastal sea is approximately 1,700; the highest proportion of fishermen live...
in Saare county, followed by Pärnu, Hiiu, and Harju counties. Coastal and internal water fishing is developed and supported through local initiatives. For example, renewing fishing ports, refining fish, and creating opportunities for direct marketing; professional fishermen can diversify their activities to earn higher income in addition to seasonal fishing; traditional fishing events are held.

**Fishing and aquaculture production 2014–2018, tonnes**

*Sources: the Veterinary and Food Board, Statistics Estonia*

**Coastal fishing harvest 2014–2018, tonnes**

*Source: the Veterinary and Food Board*

**The fishing industry prioritises export as well as the internal market**

As at the beginning of 2019, a total of 101 institutions that processed fish and produced fisheries products operated in Estonia. Over half of the production of the local fishing industry is sold on the foreign market.
Of Estonian export in 2018, fish and fisheries products constituted 108,400 tonnes, worth 147.5 million euros. 86% of exported fish and fisheries products were of Estonian origin. The products were transported to nearly 50 target countries. External markets varied, but the most important target market for export was Finland where, in 2018, Estonian fish and fish products were sold in the sum of 27.6 million euros. Other main export markets were Ukraine, Sweden, Switzerland, Iceland, and Denmark.

<table>
<thead>
<tr>
<th></th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Export</td>
<td>170.7</td>
<td>134.9</td>
<td>141.4</td>
<td>147.5</td>
</tr>
<tr>
<td>incl. for products of Estonian origin</td>
<td>140.5</td>
<td>107.0</td>
<td>111.0</td>
<td>118.5</td>
</tr>
<tr>
<td>Import</td>
<td>140.5</td>
<td>112.9</td>
<td>124.5</td>
<td>124.6</td>
</tr>
</tbody>
</table>

**Export and import of fish and fisheries products in 2015–2018, in millions of euros**

*Source: Statistics Estonia*

![Fish export categories](chart-image)

**The export of fish and fisheries products of Estonian origin by product groups (proportion by value) in 2018**

*Source: Statistics Estonia*

**Recreational fishing**

One of the most important aspects in 2017 for both professional and recreational fishing was the new Fishing Rules entering into force on 1 January. Among other things, they elaborated the use of recreational fishing gear in internal waters, post-fishing storage in a body of water, minimum sizes of fish, closed seasons and closed areas. New fishing
Recognised and active fish farms, 2017

Sources: the Land Board map of 2016, the Veterinary and Food Board 2016

gear was added – trap nets (the image is of a ramp type trap net).

Recreational fishing is a popular leisure time activity that is the hobby of over 100,000 recreational fishermen. The electronic acquisition and reporting of fishing authorisations has minimised administrative obligations. Legislations regulate the ‘everyman’s right’.

State services are at a high level and the environmental effects are kept under control. Access to bodies of water has been made easier by new marinas – quays, moles, and other infrastructure have been restored. This guarantees a simple and equal access to recreational fishing to all enthusiasts.

Aquaculture

The gear and technology used in aquaculture are environmentally sustainable. Estonia prioritises the quality of aquaculture, high added value, and an increasing export of aquaculture products. The main species grown in Estonia is rainbow trout. There is high potential for offshore aquaculture, including the culture of seaweed and carp.
The most extensive projects of the Ministry of Rural Affairs in 2019

OPEN FISHING PORT DAY – the third national Open Fishing Port Day is held on 27 April. Fishermen and coastal areas can introduce their everyday lives. The event takes place in the spring high season of the Baltic herring. More information: www.avatudsadamad.ee.

MAAMESS – the ministry and institutions of the area of government will have a joint desk at the Tartu Maamess on 25–27 April.

OPEN FARM DAY – the fifth national Open Farm Day is held on 21 July. Farms and agricultural producers will open their doors for a day. Upon their own choosing, they may allow visitors in for two days. More information: www.avatudtalud.ee.

ESTONIAN FOOD – in the course of a year, the Ministry of Rural Affairs will organise several events to introduce Estonian food: choosing the food district of the year, the Open Food Industries Week in May, and the Estonian Food Month in September. More information: www.eestitoit.ee. New food experiences can be enjoyed at the Estonian Culinary Route that unites catering companies who value the local food culture. More information: www.toidutee.ee.

FOOD LABELLING – an informative campaign at the end of the year. The first campaign was held in 2018 with the purpose of encouraging consumers to read food labels and understand the information provided for them on the label. The follow-up campaign aims to secure the existing knowledge and reach an even larger number of consumers.