OF development in Estonia

Merit Mikk
Estonian Organic Farming Foundation
meritoko@gmail.com

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Milestones of OF development

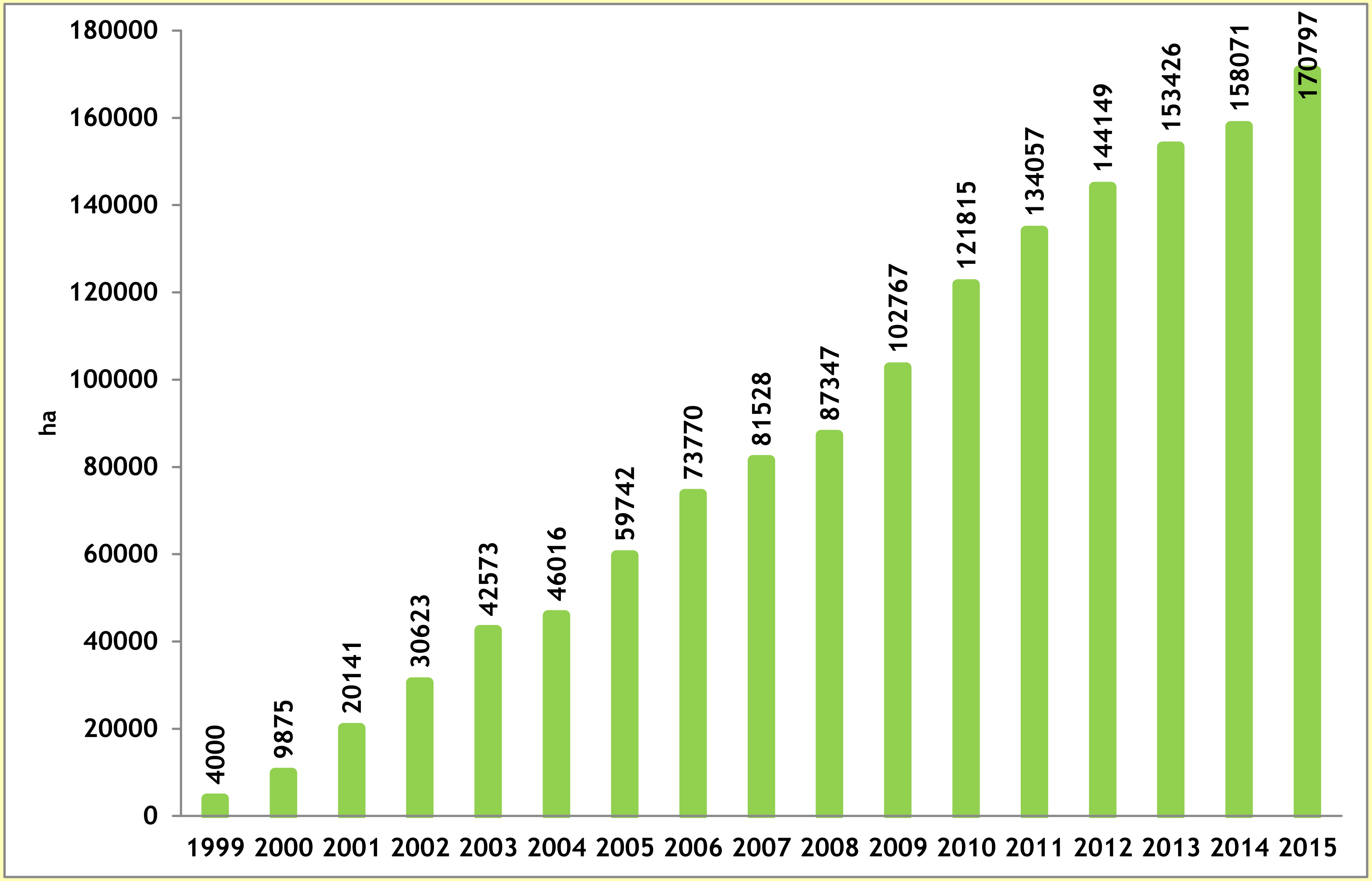
1989	Establishment of Estonian Biodynamic Association
	Private standards, control system and label
1997	First Organic Farming Act
1999	State organic label
	First OF conference
2000	National organic farming support
2001	New Organic Farming Act, state control system
	National agri-environmental pilot project
2004	Establishment of OF bureau in the MoA
	Support for OF as part of AEM-s within RDP
2006	Establishment of OF Platform (8 org-s, 2016 - 15)
2007	First Organic Farming Action Plan
2009	New Organic Farming Act + regulation of new areas (e.g. catering)
2014	Second Organic Farming Action Plan (2014-2020)

(www.agri.ee/en/objectives-activities/organic-farming)

OF development since 2004

Farming	2004	2015
Total OF acreage	46 004 ha / 5%	170 797 ha /17%
No of farms	810	1 629
Share of arable land in UAA in OF	n.d.	42
Processing		
No of organic processors	5	124
No of on-farm processors	3?	52
Market		
Size of organic food market	very small	ca 2%
Share in total consumption	very small	
Policy support		
Action plan existence	no	yes
OF payments (RDP)	yes	yes
Measures supporting OF (national)	yes	yes

Organic agricultural area 1999 - 2015



Data source: Agricultural Board, 2016

Main success factors (2004-2016)

- High attention to farmers education (incl. obligatory training), availablity of information materials
- From 2016 long-term programme for training and information (RDP Knowledge Transfer and Awareness measure) – production, processing, catering
- High share of forest (incl. all state forest) approved as organic
- Inreasing interest from retail sector to sell organic products
- Increasing consumers awareness
  - Promotion campaigns (often supported through national marketing support)
  - Activities for children (lectures, cooking, farm visists)
  - Increased media interest

Main obstacles (2004-2016)

- Some sectors of production very poorly developed (pork, poultry, dairy)
- Poorly developed processing, still small number of locally processed organic products available
- Lack of applied research in OF
- Lack of cooperation (farmers)
- Organic representation capacity
- Accurate market data not available (getting better☺)
- High price difference between organic and conventional food. Low purchasing power
- Despite of promotional activities still a lot of consumers consider evrything coming from Estonian farms as „almost organic“

Main challenges 2016

- Improving the competitiveness of organic farming
  - Enhancement of farmers’ technical knowledge and investment capacity
  - Increasing productivity and profitability
  - OF support – **smaller** support than in 2007-2013, lower payment rates compared to most of the other countries. Competing measures (AE, animal welfare). Overapplication in 2016 – reduced support
  - Encouragement of more market-oriented farming
  - Research and innovation
- Development of processing
- Increasing capacity of organic sector representation
- Increasing the interest of catering sector (new label)
- Promoting OF among policy makers (OF as provider of PG-s and ecosystem services, health)
- Increasing the consumption of (local) organic food
  - Increasing consumers awareness, educating children etc.


Thank you!