

Organic Agriculture in Estonia

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Abstract

Organic farming area has increased significantly during last 15 years in Estonia. The acreage in 2004 was over 46 000 ha (over 5% of total agricultural area). Organic farmers receive acreage support and state supports training on organic production methods. On the other hand the processing and marketing are still poorly developed. Initiatives and support are needed to improve the situation.

Key words: organic farming, development, production, processing, marketing.

Development of Organic Farming in Estonia

The organic farming movement in Estonia started with the establishment of the Estonian Biodynamic Association (EBA) in 1989. EBA developed the first Estonian standards for organic farming based on IFOAM standards and started also to inspect the farms. The foreign experts helped in advisory and inspection work. During the mid-1990s, development slowed. The growth started again in 1997/1998, when state started to pay attention to the organic farming sector. In 1997 the "Organic Farming Act" came into force, and in 1998 the state label "*Mahemärk*" was introduced in compliance with this act. Since the beginning of 1999 the organic farming has developed rather rapidly: while in 1999 there were 89 organic farms or farms in conversion and around 4000 hectares of organically managed land, then after five years, in 2004 the number of organic farms has risen up to 810 and the acreage up to 46 016 ha (incl. under conversion area).

Also the new state label for organic products was introduced in spring 2005.

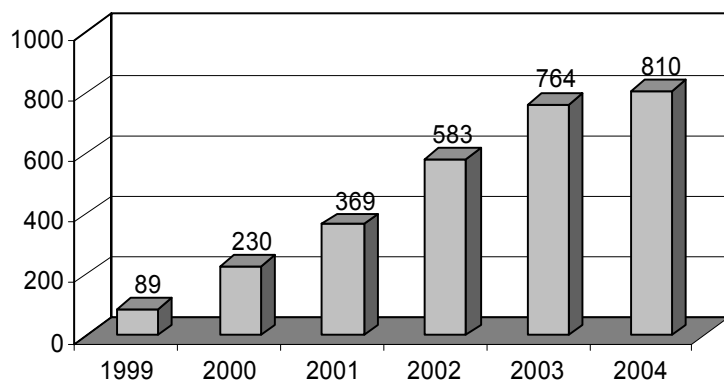


Figure 1. Number of organic farms in 1999 – 2004

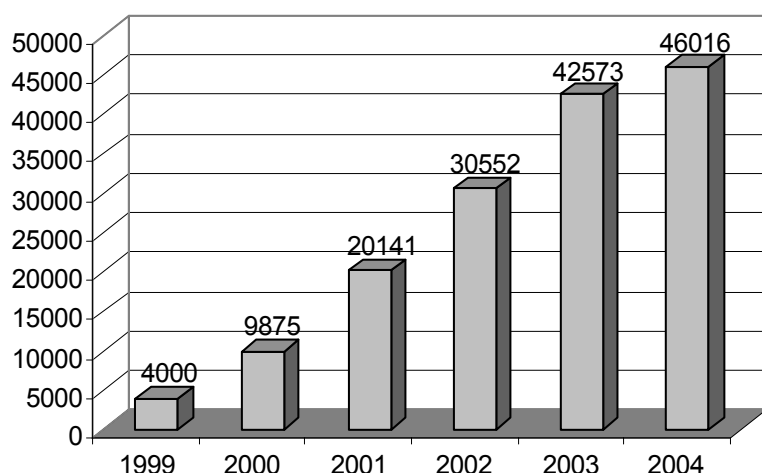


Figure 2. Area of organically managed land in 1999 – 2004 in hectares.

Most of the organic farms are concentrated into regions with traditionally extensive agriculture, in western and southern parts of Estonia. In 2004 the biggest share of organically managed land is in Hiiu County, where 91 organic farms are managing ca 60% of agricultural land, followed by Saare County (around 14%), Võru and Lääne County (around 10%). In average the percentage of organic land is around 6%.

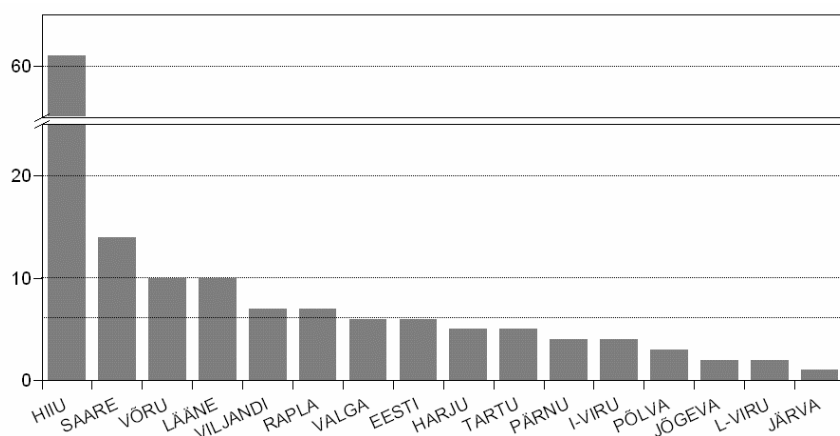


Figure 3. Share of organically managed land (%) in Estonian Counties in 2004.

Land use, animal husbandry

72 % of organic farms have less than 50 ha of land, 5,5% are bigger than 200 ha. The two biggest Estonian organic farms (specialised on milk production) have respectively 897 ha and 843 ha of agricultural land.

Most of the organic farms are mixed farms. There are also farms specialised in cereals, vegetable, herb and berry production. There are no farms specialised on the seed production, only few farms during several years have had some certified seed production.

Most of the organic land (81%) are grasslands, incl. natural, permanent and short-term grasslands, 12% is under cereals.

The most common animals on organic farms are cows (10 000) and sheep (11 000 animals). Already almost 1/3 Estonian sheep are organic. Only small number of pigs and poultry are kept organically.

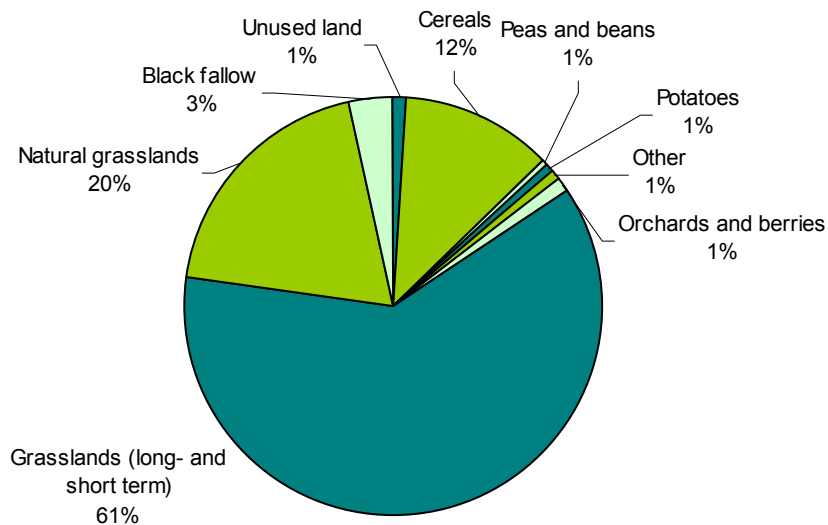


Figure 4. Organic land use in 2004

Control system and fees

Current control system was established in 2001. Until then the private bodies were implementing the inspection and certification both according to the private and state standards under state supervision.

From 2001 there are only state authorities implementing inspection and certification.

Producers are inspected and certified by the Estonian Plant Production Inspectorate, processors by the Estonian Veterinary and Food Inspectorate and caterers by the Health Protection Inspectorate.

Farms are inspected by the inspectors of the PPI local bureaus. Every farm is inspected at least once per year. In 2004 in total 1490 inspection reports were made.

Farmers have to pay state fee for the inspection every year. Farms up to 10 ha have to pay ca 13 EUR, every additional ha adds to this sum ca 0.32 EUR. If one farm has both organically and conventionally managed land, it has to pay also for conventional land. The upper limit of the fee is 8000 EEK (ca 511 EUR).

Acreage support

Starting in the year 2000, the state supports organic farmers by paying hectare subsidies under agri-environment programme. The payment rate is the same for the land in conversion and for organic land but differs according to the crops grown. From 2004 the support is paid under 5-years contracts. In 2004 the support rates were following:

- 96.89 EUR for arable land (in rotation),
- 73.88 EUR for permanent grasslands (0,1 animal unit/ha, at least 50% of farm animals organic),
- 240.56 EUR for vegetables, berries and orchards.

Other support

In 2004 the bureau of Organic Farming was established in the Ministry of Agriculture. Until then there was only one specialist working with organic farming. The bureau is also responsible for the development of Estonian Organic Farming Action Plan which should be ready by the end of 2005.

During several years the state has been supporting some training of farmers and advisors, preparation of information materials, incl. organic farming magazine. State has supported few international development projects dealing with organic farming.

Most of supported activities have been focussing on primary production, the other parts of food chain, processing and marketing, have received much less attention.

It should be also mentioned that many projects supporting organic farming development have been initiated by private NGOs.

Problem areas – processing and marketing

Although the primary production has developed quite well during past years, the organic products are still not available for the consumer. The organic market is just at the initial stage, there are only few specialised organic (health) shops, one of them is developing a box scheme, offering boxes with mainly fresh vegetables to the residents in Tallinn and Tartu. Some conventional shops are also selling few organic products. For marketing of organic meat, organic farmers' co-operative Eesti Maheliha was established. Eesti Maheliha is negotiating with conventional meat processors to start organic meat processing in close future. They are also selling organic vegetables on marketplace in Tallinn.

Most of organic products are sold as raw material to conventional processing (esp. milk and meat) or directly to the consumer (in most cases without organic labeling).

One reason for organic market poor development is absence of processed Estonian organic products. In 2004 only 6 organic processors were registered and only couple of them are really active. This considerably limits marketing in stores.

The increase in the amount of products and the development of processing opens the supermarkets for organic products which people can buy more easily there. According to the Estonian Institute of Market Research, 54% of Estonians prefer to buy food products from supermarkets, 25% - from small stores, 15% - from markets, 4% - from warehouses and only 2% - from farms.

Estonian consumers are interested in organic products and are evaluating them as more healthy and uncontaminated as well as environmentally friendly. That is a good support for the development of organic market in Estonia.