

# Organic Agriculture in Estonia

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## 1 General Information on the Situation of Agriculture in Estonia

In Estonia the percentage of land used for agriculture is rather small. At the beginning of 1999, the total agricultural area was 1,433,100 hectares. Arable land and grassland amounted to 1,119,800 hectares (24,8% of the total area). Additional 313,300 hectares are extensive natural grasslands. The agricultural sector is not faring well. Salaries are only around half of the Estonian average; prices are unstable and sometimes below the production costs. This situation and the still ongoing land privatisation process are the main reasons why about 21% of the arable land and grassland have been abandoned.

The present agricultural situation provides clear opportunities for developing the organic sector.

## 2 History and Development of Organic Agriculture in Estonia

The organised organic farming movement in Estonia started with the establishment of the „Estonian Bio-dynamic Association” (EBA) in 1989. At the beginning of the 1990s, EBA organised several training courses in co-operation with Finnish, Swedish and German bio-dynamic and organic farming organisations. Several farmers received three to six months of practical training in the three afore-mentioned countries. Several local producer organisations were established (e.g. in the counties of Võru, Saare and Lääne). The foreign experts helped advise and inspect the farms. During the mid-1990s, development slowed and so did the training activities.

The next growth period started in 1997 / 1998. In 1997 the „Organic Farming Act” came into force, and in 1998 the state label „Mahemärk” was introduced in compliance with this act. The organic sector has developed rather rapidly since the beginning of 1999.

## 3 Statistics on the Increase in Organic Hectares and Farms

In 1999 there were 89 organic farms or farms in conversion, two processors and one catering company which were certified according to the state label requirements (the „Mahemärk” label; see „Standards and Certification...” below). An additional 25 farms (with 600 ha of agricultural land) were certified according to the standards of the Estonian Bio-dynamic Association („Öko” label). In total there were around 4000 hectares of certified (incl. in conversion) agricultural land in 1999 (0.4% of the agricultural land in production). The average size of the organic farms is higher than the average size of conventional Estonian farms.

In the year 2000 there are around 250 farmers (inc. in conversion) with more than 10,000 ha who have applied for the state label „Mähemark”. The rapid rise is mainly due to the intensive promotional work by the organic producer organisations in 1999 as well as to growing state interest in developing organic farming (including area support for organic farming from 2000 onwards). Most of the farms concentrated in regions with



extensive agriculture, although few larger farms and agricultural enterprises in intensive regions have also applied.

#### **4 Organic Agriculture Organisations**

There are three organic farming organisations. The „Estonian Bio-dynamic Association” was established in 1989. By the end of 1999 it numbered 86 members from all over Estonia. „*Kagu-Eesti Bios*” was established in 1997. By the end of 1999 it numbered close to 60 members, mostly from the three south-eastern counties of Estonia. In May 2000 new organisation “Estonian Organic Producers Union” was established with the aim to unite larger producers with the purpose of marketing.

There are also local producer organisations in the counties of Lääne, Saare and Viljandi.

#### **5 Regional Distribution of Organic Farms**

Most of the organic farms and farms in conversion are clearly concentrated in three regions - South-East Estonia (Võru, Põlva and Valga counties), Saaremaa island (Saare county) and West Estonia (Lääne county). These areas have traditionally had extensive agriculture due to natural conditions, and therefore the conversion to organic farming is relatively easy there. Another factor is that there are strong leaders who promote organic farming at the regional level. The most rapid growth in the number of organic farms is presently in South-East Estonia.

Apart from South-East Estonia, West Estonia and the islands, there are also several organic farms in other regions. In one out of the 15 counties there are no organic or in conversion farms at present.

#### **6 Land Use, Animal Husbandry**

Most of the organic farms are mixed farms, but several farms specialise in dairy cattle, vegetables, herb and berry production or beekeeping. One farm specialises in the seed production of grains and legumes. The most common animals on organic farms are cows.

#### **7 Standards and Certification, State Regulations**

The first standards for organic farming were developed by the Estonian Bio-dynamic Association in 1990. Farmers working according to these standards may apply for the „Öko” label. The standards were drawn up using the IFOAM (<http://www.ifoam.org>) standards as a basis. At present, these standards are being revised. Several amendments will be made, and more standards, e.g. on biodiversity, will be included. The control system needs amending, too.



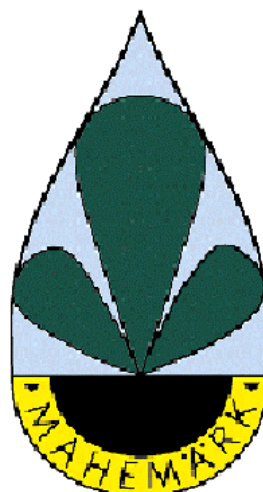
As mentioned before, the state started to regulate organic farming in 1997 with the „Organic Farming Act” (<http://www.legaltext.ee/ndefault.htm>). Farmers working according to this act and related regulations have been able to use the state „Mahemärk” label since 1999. The state conferred the right to grant the „Mahemärk” label to two organisations, the Estonian Bio-dynamic Association and *Kagu-Eesti Bios*. These organisations inspect farms twice a year. Certification is performed under state supervision. Two bodies are responsible for state supervision: the Estonian Plant Inspectorate (<http://www.plant.agri.ee>) (for production) and the Estonian Veterinary and Food Inspectorate (for processing).

The present system will be changed in the year 2001, and the new system will conform with EU requirements. The main constraint of the present system is that certification is performed by producer organisations. Details of the new system are still under discussion.

Figure 1: Öko-label



Figure 2: Mahemärk



## 8 Implementation of EU Regulation 2092/91

The present Organic Farming Act (<http://www.legaltext.ee/ndefault.htm>) (passed in 1997) does not fully conform with EU Regulation 2092/91. By the autumn of 2000 this act and accompanying regulations will be harmonised with EU legislation on organic farming (including Regulation 1804/99).

## 9 State Support, Policy Initiatives

Interest in organic farming has increased rapidly in the Ministry of Agriculture (<http://www.agri.ee>) since 1999. A person who is mainly responsible for organic farm-



ing was hired, and several means of support have been generated for the year 2000 (e.g. co-financing research and training projects). Starting in the year 2000, the state supports organic farmers by paying hectare subsidies both for agricultural land in conversion and for organic agricultural land. The payment rate will be the same for land in conversion and for organic land.

However, higher subsidies for the conversion period is currently under discussion.

## 10 Implementation of Agenda 2000

The Estonian Agri-environmental Programme, which will correspond to the requirements of the new rural development regulation (EU Regulation 1257/99), is in preparation. This programme will include organic farming as one of its measures. But right now it is too soon to tell whether the whole programme or only some measures will be implemented before Estonia accedes to the EU.

## 11 Marketing

The marketing of organic products is rather poorly developed. Several new initiatives will soon be launched, but consumers still have difficulties finding any organic products in the shops.

The most common marketing channels are direct sales from the farms, and supplying hospitals, schools, kindergartens and local shops. Relatively few farms sell processed products. Here there is great potential for development. In addition, a relatively high proportion of the organic products are not sold as organic (e.g. large dairies do not package and market organic milk separately), or they are sold without an organic label (even when the farm is certified and has the right to use a label).

At the end of 1999, the Ministry of Agriculture commissioned a consumer survey. The survey showed clear interest in buying organic products and a willingness to pay a price premium of around 10%. However, the present supply and range of products do not meet consumer needs.

## 12 Training

Most of the training for farmers is organised by the two producer organisations. *Kagu-Eesti Bios* has organised information days mostly in co-operation with the R pina Training Union. The Estonian Bio-dynamic Association offers farmers training and information days every second month in different regions all over Estonia in addition to some training courses throughout the year. In 1999 several of these training activities were supported by the Ministry of Agriculture.



In addition to the training by the organisations mentioned above, there are also several training activities organised by the Centre for Ecological Engineering (<http://www.ceet.ee/>).

Over the years, several agricultural schools have introduced basic principles of organic farming to their curricula.

The Estonian Agricultural University (<http://www.eau.ee>) does not offer any specific courses in organic farming, but a few courses include an introduction to organic farming methods as part of the curriculum (e.g. plant protection, animal husbandry). The only special course on organic farming (a one-week, post-graduate course) was organised in co-operation with the Swedish Agricultural University, the Centre for Ecological Engineering and the Estonian Agricultural University at the beginning of 1999.

There is a great lack of appropriate informational materials. Only a few booklets have been published.

From 1991 to 1994 a newsletter on organic farming („*Elav maa*” – „Living Earth”) was published by the Estonian Bio-dynamic Association. A journal on organic farming („*Mahepõllumajanduse leht*”) has been published from 1996 to the present by the Centre for Ecological Engineering. The journal mainly publishes: articles on applied research and practical farming; country and farm reports; news on organic farming; and reviews of new literature published worldwide.

There are plans to publish booklets introducing the basic principles of organic farming and to start compilation of a handbook on organic farming in the year 2000. The Ministry of Agriculture supports these publications.

### 13 Advisory service

There are only three accredited organic advisors in Estonia. The farmers' interest in using the advisory service varies a lot. Most of the farmers from southern Estonia make use of this opportunity, but several new farmers are not interested, even though the state defrays a major part of costs.

The farmers who started organic farming more than six years ago and who have received rather good training do not need the advisory service, and they often advise other farmers in the region themselves.

There is a great need for training new advisors who will specialise in organic farming as well as for introducing the general principles of organic farming to conventional advisors. Some activities have already started in the year 2000 in response to this need.

### 14 Research

There has not been much research in the field of organic farming, but the high importance of research is clearly recognised by several institutions dealing with organic



farming. On-farm research is especially needed, e.g. to find out appropriate crop rotations and varieties.

The Estonian Agricultural University has carried out a few projects which included organic farming. All of these projects dealt with plant protection. There is interest in developing research on organic farming, but it is difficult to find the financial resources required.

The only pilot research project on organic farming was jointly implemented by the Danish Institute of Agricultural Sciences and the Centre for Ecological Engineering in 1998. This project was aimed at getting an overview of the main problems of organic farms, particularly dairy farms. The project was supposed to continue in 1999, but the Estonian side was not able to find adequate funding, and the project was cancelled.

Vegetable and grain variety tests are being made in South-East Estonia at the initiative of local trainers.

Some applied research projects on organic farming have started in 2000 with the support of the Ministry of Agriculture. E.g. on-farm research to find out appropriate crop rotations and grain varieties (managed by Centre for Ecological Engineering), study on finding out the appropriate potato varieties (managed by DIAS and Jögeva Seed Breeding Station) and few others.

## 15 Challenges and Outlook

Taking into account the present agricultural situation, the expansion of the organic sector in 1999 and the high level of consumer interest, there is great potential for the rapid development of the sector in the near future. Organic agriculture is expected to increase by at least by 50% per year during the next years.

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