ORGANIC IN EUROPE
PROSPECTS AND DEVELOPMENTS
Support under the EU rural development programme: Subsidies to convert to organic farming amount to EUR 140 (DKK 1 050) per hectare annually, during the conversion period. An additional EUR 13 (DKK 100) per hectare annually will also be provided over the three subsequent years, during the first 5-year commitment period.

Other policy support: Farmers can apply for direct payments in support of extensive or environmentally friendly farming practices of EUR 110 per hectare. In addition to the financial support for organic farmers, the Danish government also discourages conventional farming by levying high taxes on products such as fertilisers and pesticides. Funding is provided to the International Centre for Research in Organic Food Systems (ICROFS), for investments in new technologies and for the development of new products.

RESEARCH & ADVICE
ICROFS calls itself a centre without walls, where scientists remain in their own locations while working across institutions. Its activities are coordinated by a secretariat at the Research Centre Fouulum, Aarhus University. Since 1996 three major organic research programmes have been launched DARCOF I, II and III.

The Danish Agricultural Advisory Service is Denmark’s oldest and largest organic extension service. Run by the farmers’ union, the Danish Agriculture & Food Council, it operates on two levels. Regionally, about 30 agricultural centres provide advice to farmers, while the experts working at the central Knowledge Centre for Agriculture coordinate the development of the advisory services.

CHALLENGES & OUTLOOK
Consumers, politicians, companies and farmers are all looking for ways to secure sustainable development in Denmark. Organic farming plays a vital role in this. The challenges facing the stakeholders include the need to maintain the integrity and the quality of the organic products, while further developing organic farming and informing consumers about organic products. The political establishment must maintain its focus on organic farming as an effective environmental tool and not just a market opportunity, and conventional processors must become involved in the processing and promotion of organic products, both in Denmark and abroad.

FURTHER INFORMATION
- Organic Eprints for Denmark: www.orgprints.org/view/projects/1darcof.html
- Denmark’s biggest agriculture website, providing more than 100 000 articles on agricultural practice: www.landbrugsinfo.dk

For other relevant websites, see the section on key sector institutions

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**ESTONIA**

**KEY INDICATORS 2012**

<table>
<thead>
<tr>
<th>Area</th>
<th>Organic agricultural area</th>
<th>144 149 hectares</th>
</tr>
</thead>
<tbody>
<tr>
<td>Share of total agricultural area</td>
<td>15.3 %</td>
<td></td>
</tr>
<tr>
<td>Change 2002 to 2012</td>
<td>+370 %</td>
<td></td>
</tr>
<tr>
<td>Change 2011 to 2012</td>
<td>+8 %</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Operators</th>
<th>Organic producers</th>
<th>1 478</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organic processors</td>
<td>64</td>
<td></td>
</tr>
<tr>
<td>Organic importers</td>
<td>No data</td>
<td></td>
</tr>
<tr>
<td>Organic exporters</td>
<td>No data</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Market and trade</th>
<th>Retail sales</th>
<th>Estimated value EUR 20 million (2011)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Share of total market</td>
<td>1.6 % (all organic products, 2011); 0.47 % (Estonian organic products, 2011)</td>
<td></td>
</tr>
<tr>
<td>Per capita consumption</td>
<td>Approx. EUR 15</td>
<td></td>
</tr>
<tr>
<td>Change in retail sales 2011 to 2012</td>
<td>No precise data for all organic food; 39 % increase in Estonian organic food sales (2010 to 2011).</td>
<td></td>
</tr>
</tbody>
</table>

| Organic exports | No data |
| Organic imports | No data |

**HIGHLIGHTS FOR 2013 & 2014**

- The first organic farmers’ cooperative Eesti Mahe is 10 years old

**HISTORY OF ORGANIC FARMING**

- 1989: Foundation of the Estonian Biodynamic Association
- 1997: First Estonian Organic Farming Act
- 2006: Foundation of the Estonian Organic Farming Platform (uniting all the active organic farming organisations)
KEY SECTOR INSTITUTIONS
- Estonian Organic Farming Platform (EOFP)
- Estonian Organic Farming Foundation (EOFF): www.maheklubi.ee
- Farmers’ Cooperative Eesti Mahe (Estonian Organic): www.eestimahe.ee
- Centre for Organic Farming of the University of the Life Sciences: www.mahekeskus.emu.ee
- Centre for Ecological Engineering (CEET)

PRODUCTION BASE: LAND USE AND KEY CROPS
Of the total agricultural area, 54% consists of permanent grassland and grazing areas (78,453 hectares), 44% is arable land (63,933 hectares), and 1% is used for permanent crops. The key arable crops are temporary grasslands (31,415 hectares), cereals (23,626 hectares) and oilseeds (3,065 hectares). The key permanent crops are berries (1,055 hectares), fruits (507 hectares) and medicinal and aromatic plants (not separated by arable and permanent crops, in total 51 hectares). In addition to the agricultural land, there are almost 130,000 hectares of wild collection areas.

MARKET
The development of organic processing and marketing has not kept up with developments at the farm level. The main obstacle to sales of locally produced organic food is that processing is underdeveloped (small number of processors and small production amounts). Therefore a lot of organic raw produce (mostly from animal husbandry) are sold as conventional. However, in 2012 strong growth was also recorded in these areas.

Market channels: No official data on market channels exist. Considerable amounts of organic food are sold through specialist organic and health-food shops (more than 40 shops). Direct marketing also has a notable share, but its importance is decreasing. The biggest increase in sales over the past two years is likely to have occurred in conventional stores and supermarkets. Some new marketing channels have appeared (e.g. fresh milk vending machines in supermarkets).

Exports and imports: Data on exports and imports are not publicly available. It is estimated that around 70 – 75% of organic products sold are imported. These are mostly processed products, but also include some vegetables and fruits. Some milk and meat products are imported. A limited number of products are exported. Those sold in the largest quantities are cereals (mostly through the organic farmers’ cooperative Wiru Vili) and meat. Exported amounts are growing every year.

STANDARDS, LEGISLATION, ORGANIC LOGO
Estonia applies EU legislation on organic farming and other regulations and is implemented at the national level by the Estonian Organic Farming Act and associated ordinances.

There is a national logo, and most of the Estonian producers use it on their products. The national logo is far better known than the EU organic logo.

POLICY SUPPORT
National action plan: The Estonian Organic Farming Action Plan 2007-2013 exists, together with a plan for its implementation (Eesti Mahepõllumajanduse Arengukava ja selle rakendusplaan aastateks 2007-2013). It aims to increase the competitiveness of organic farming, increase the market share of organic products, and make local organic food more easily available to consumers. No guarantees were made that all the planned measures in the action plan, or the plan for its implementation could be funded (or implemented), but the Ministry of Agriculture has allocated some money every year. Funds from the rural development programmes and other sources have also been used (often through projects initiated by organic organisations). Almost every year, the Ministry of Agriculture has financed a seminar to evaluate the implementation of the organic action plan. The preparation of the new organic action plan has started.

Support under the EU rural development programme: Organic farming support payments have been made since 2000; since 2004 (when Estonia joined the European Union) these have been part of the rural development agri-environment support. The support payments are granted for arable crops (cereals, oil and fibre crops, potatoes, fodder roots, legumes, and temporary grasslands); field vegetables, medicinal and aromatic herbs, fruits and berries; and grasslands (excluding temporary grassland) where at least 0.2 livestock units are kept per hectare. In addition, support is also available for organically kept grazing animals, poultry, pigs and rabbits, and for organic beehives.

Other policy support: State support for market development is not especially targeted at the organic sector, but organic farming organisations have been active in applying for it (e.g. to implement promotion activities, organise farmers/processors participation in local fairs, study trips for farmers to different countries).
RESEARCH & ADVICE
Only a few research projects exist in the field of organic farming. Most of them are conducted by the Jõgeva Plant Breeding Institute, the Agricultural Research Centre and the Estonian University of Life Sciences.

A specialised organic farming advisory system does not exist in Estonia. Advisors are mostly self-employed and connected to the county-level advisory services. There are no advisors specialising purely in organic farming. Organic farmers are offered courses of basic and further training, which meet the requirements of the Ministry of Agriculture and are financed through the rural development programmes. In addition to these courses, other financial resources are available for the organisation of training.

CHALLENGES & OUTLOOK
The Estonian organic sector needs to develop organic food processing and boost the domestic organic food supply. Consumers’ interest in organic food has increased considerably, and the organic market has shown quite rapid development in both 2012 and 2013. Interest is also increasing in the catering sector (e.g. restaurants, kindergartens, schools).

FURTHER INFORMATION
- Ministry of Agriculture, with an organic section and links to legislation, a wide variety of published information materials and reports: www.agri.ee/mahepollumajandus

For other relevant websites, see the section on key sector institutions.