PROSPECTS & DEVELOPMENTS FOR ORGANIC IN NATIONAL CAP STRATEGIC PLANS

ESTONIA

#ORGANICINEUROPE

KEY INDICATORS 2019

PRODUCTION

- 220,737 ha organic agricultural land (22.2%)
- 2,060 organic producers on average farms of 107.2 ha
- 120,467 ha (17.5%)¹
- 2,549 ha (73.5%)¹
- 97,721 ha (32.1%)¹

MARKET

- €61.8 million retail sales (3.7%)
- 173 organic processors

CAP SUPPORT (2018)²

- 1,760,000 ha supported
- 85.1% of certified area at average of 105 €/ha/year
- 18 M€/year expenditure

2030 SCENARIOS FOR CAP EXPENDITURE² & ORGANIC AREA

<table>
<thead>
<tr>
<th></th>
<th>Organic area (kha)</th>
<th>National organic area share</th>
<th>Average annual growth</th>
<th>SUPPORTED by the CAP</th>
<th>CAP expenditure (M€/year)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Certified</td>
<td>Supported</td>
<td>2018 rates</td>
<td>2018 rates + 25%</td>
<td>If 100% certified area supported³</td>
</tr>
<tr>
<td>2014-2019</td>
<td>221</td>
<td>188</td>
<td>20</td>
<td>25</td>
<td>29</td>
</tr>
<tr>
<td>LINEAR⁴</td>
<td>376</td>
<td>320</td>
<td>33</td>
<td>42</td>
<td>49</td>
</tr>
<tr>
<td>POTENTIAL⁵</td>
<td>299</td>
<td>254</td>
<td>27</td>
<td>33</td>
<td>39</td>
</tr>
<tr>
<td>ENHANCED⁶</td>
<td>352</td>
<td>299</td>
<td>31</td>
<td>39</td>
<td>46</td>
</tr>
</tbody>
</table>

In 2018, conversion/maintenance support was paid on 85.1% certified area at 105 €/ha/year average. Based on these scenarios, a 30% by 2030 target is realistic and achievable, but would require up to 2 times current expenditure. If achieved, this would contribute 0.19% to the EU target of 25% by 2030.

¹ Share of national total for category
² CAP support for organic conversion and maintenance, including national co-financing
³ These values are further explained in the technical note that is available on www.organicseurope.bio
⁴ Linear trend growth continuing on 2014-2019 basis
⁵ Target proposed by independent researcher
⁶ Enhanced target needed to reach EU 25% target
CURRENT CAP, NATIONAL POLICY SUPPORT & ACTIONS NEEDED

CAP SUPPORT PAYMENTS (IN €/HA/YEAR)

<table>
<thead>
<tr>
<th></th>
<th>Annual crops</th>
<th>Horticulture crops</th>
<th>Permanent crops</th>
<th>Grassland</th>
<th>Production</th>
<th>Consumption</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conversion</td>
<td>137.5</td>
<td>231-660</td>
<td>330</td>
<td>27.5-88</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maintenance</td>
<td>125</td>
<td>210-600</td>
<td>300</td>
<td>25-80</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Conversion as % of maintenance</td>
<td>110%</td>
<td>110%</td>
<td>110%</td>
<td>110%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

ACTIONS NEEDED

- Ensure conversion costs fully recognised
- Maintain or increase funding levels

DRAFT PLANS FOR CAP 2023-2027 ORGANIC SUPPORT TO BE...

No information.

Keep focus on growing organic sector

Target for organic land should be at least 30%. Increase the payment rates both for conversion and maintenance considering that the present rates are among the lowest in the EU. Prioritize organic farming in investment, cooperation, advice, training, innovation and research measures.

7 In addition, organic livestock top up payments may be made, e.g. 255€/dairy cow, 25.5€/sheep, 6€/laying hen

NATIONAL ORGANIC ACTION PLAN

- 2014-2020
- Targets by 2020:
  - 180,000 ha national area
  - 20% regular (weekly) organic food consumers
  - Net value added per labour unit in organic farming €20,500
  - Progress towards achieving targets: Behind target
- No specific future plans. Need for action plan with 2030 targets

OTHER POLICY SUPPORT

<table>
<thead>
<tr>
<th>COMBINATION WITH OTHER AGRI-ENVI MEASURES</th>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Combinations on same land not possible</td>
<td>Introduce combinations/specific options for organic farms to benefit from synergies</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SUPPORT INVESTMENTS, MARKET DEVELOPMENT &amp; PROMOTION</th>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Situation not reported</td>
<td>Support organic market development with appropriate schemes</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SUPPORT FOR ADVICE, TRAINING, INNOVATION &amp; RESEARCH</th>
<th>Current context</th>
<th>Action needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organic applications not prioritised</td>
<td>Maintain/develop support options to promote knowledge and innovation</td>
<td></td>
</tr>
</tbody>
</table>

LEGEND

- Annual crops
- Horticulture crops
- Permanent crops
- Grassland
- Production
- Consumption

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