ORGANIC TARGETS 4EU

ESTONIA

ORGANIC SECTOR FACTSHEET

PRODUCTION/MARKET TRENDS & POLICIES

KEY INDICATORS

With 221,802 hectares, Estonia was the number two country in terms of organic area share in the European Union (22.5% of total farmland). Growth from 2001 to 2024 amounted to 1000% and was thus higher than the growth in the European Union (308%). Organic retail sales in Estonia amounted to 112 million euros or 4.7% of total retail sales, similar to the organic retail sales in the European Union. Together with the Czech Republic, Estonia is the only EU-13 country that collects detailed data on organic retail sales on a regular basis.

ORGANIC FARMLAND	2001	2024
Area* (Share of Total Farmland)	20,141 ha (2.3%)	221,802 ha (22.5%)
Area Growth from 2001 to 2024	1,001.25%	

ORGANIC LAND USE & AQUACULTURE	2001	2024
Arable Land* (Share of Total)	N/D	126,332 ha (18.2%)
Permanent Crops* (Share of Total)	N/D	2,126 ha (51.6%)
Grassland (Share of Total)	N/D	93,344 (32.8%)
Aquaculture Production (Share of Total)	N/D	N/D

ORGANIC OPERATORS	2001	2024
Producers (Share of Total)	369 (1%)	1'887 (16.6%)
Aquaculture Producers	N/D	N/D
Processors	N/D	175
Importers	N/D	37

ORGANIC RETAIL SALES	2001	2024
Retail Sales (Share of Total)	N/D	112 M€ (4.7%)
Per Capita Consumption	N/D	82 €
Retail Sales Growth from 2001 to 2024	N/D	
Imports	N/D	233 t

Source: FiBL survey based on national data sources, Eurostat and TRACES/European Commission in the framework of the OrganicTargets4EU project

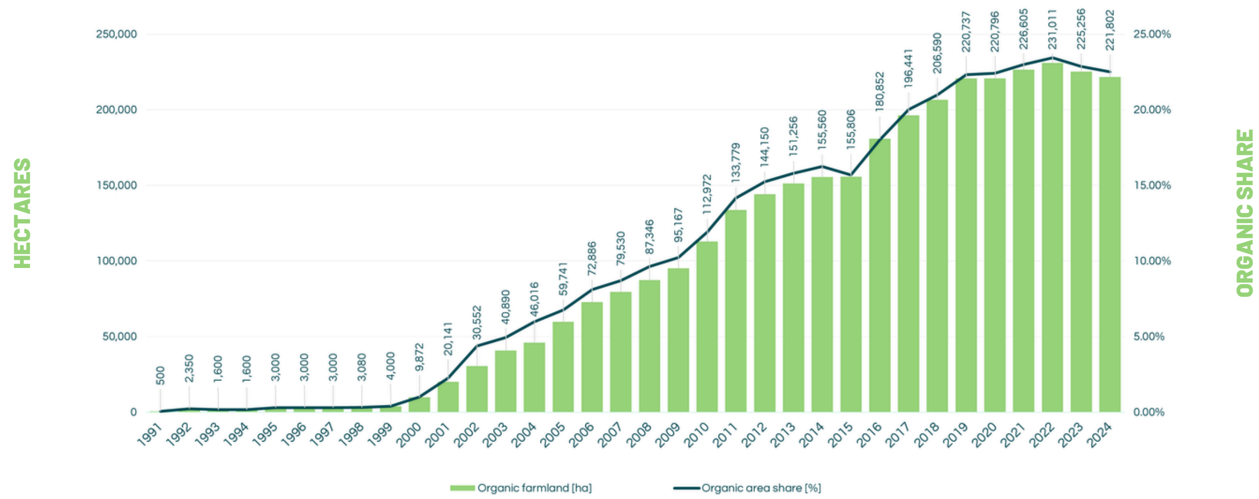
**In conversion and fully organic*

ORGANIC TARGETS 4EU

ESTONIA
ORGANIC SECTOR FACTSHEET
PRODUCTION/MARKET TRENDS & POLICIES

KEY INDICATORS

DEVELOPMENT OF ORGANIC FARMLAND IN ESTONIA



Source: FiBL-AMI Survey, based on Estonian Organic Farming Foundation, Eurostat and Nic Lampkin

DEVELOPMENT OF ORGANIC SALES IN ESTONIA

Source: Estonian Organic Farming Foundation

CAP ORGANIC POLICY SUPPORT

The Estonian CAP strategic plan is less ambitious in its area and expenditure growth targets for organic farming given the high proportion of organic land area at the start of the period. Estonia has opted to use P1 funding for both conversion and maintenance support, with the exception of organic livestock supported as a P2 scheme. With the exception of vegetables, payment rates have only increased slightly or not at all and conversion support is only 10% higher than maintenance payments.

CONVERSION & MAINTENANCE	2018	2027
Land Area Supported (Change from 2018)*	186 kha	230 kha (+24%)
Share of Total Agricultural Area Supported*	18.9%	23.4% (+24%)
Share of Certified Organic Area Supported (Change)*	90%	N/D
Expenditure per Year*	18 M€	26 M€ (+41%)
Expenditure per Hectare Supported*	99 €	113 € (+14%)

SHARE OF CAP RESOURCES	CAP EXP. 2023-2027	ORGANIC SHARE*
Organic Farming Support (P1/P2)*	120 M€	100%
Eco-Schemes (P1)	279 M€	27.9%
Agri-Environment, Climate, Welfare (P2)	151 M€	
Total CAP Expenditure	1,614 M€	7.4%

**including in-conversion and fully organic land*

CAP ORGANIC CONVERSION AND MAINTENANCE PAYMENTS FOR DIFFERENT LAND USES

INDICATOR	YEAR	FUND	GRASSLAND**	ARABLE CROPS	HORTICULTURE***	FRUIT CROPS	LIVESTOCK
Conversion Support (€/ha)	2019	P2	27.5 - 88	138	660	330	85/LU
	2023*	P1/P2	27.5 - 146	146	880	330	85/LU
Change from 2019 to 2023			0%	+6%	+33%	0%	0%
Maintenance Support (€/ha)	2019	P2	25 - 80	125	600	300	85/LU
	2023*	P1/P2	25 - 132	132	800	300	85/LU
Change from 2019 to 2023			0%	+6%	+33%	0%	0%
Conversion Support Higher than Maintenance		2019	+10%	+10%	+10%	+10%	0%
		2023	+10%	+10%	+10%	+10%	0%

P1 (Pillar 1) European Agricultural Guarantee Fund (EAGF); P2 (Pillar 2) European Agricultural Fund for Rural Development (EAFRD) and naional co-financing - P2 funding used for livestock

**Payments reduced over 70ha fruits/berries, 10ha vegetable, 5ha for herbs*
***Higher rate for short term grass in rotation, reduced to 100 €/ha from 2025 due to limited budget*
****300 maint. 330 conv. for potatoes, strawberries*

Sources for pages 3 and 4
Lampkin N, Lembo G, Rehburg P (2024) Assessment of agricultural and aquaculture policy responses to the organic F2F targets. OrganicTargets4EU project Deliverable 1.2. Braunschweig: Thünen-Institut.
Lampkin N, Sanders, J (2022) Policy support for organic farming in the European Union 2010-2020. Thünen Working Paper 200. Braunschweig: Thünen-Institut.
Sources for updates: Contacts in national Ministries and organic sector organisations (pers. comm. 2026)

ESTONIA

ORGANIC SECTOR FACTSHEET

PRODUCTION/MARKET TRENDS & POLICIES

NATIONAL ORGANIC ACTION PLAN

Estonia's first organic action plan was published in 2007. The third action plan reflects a strong emphasis on public and professional information campaigns, capacity building and training and research activities. Market actions have a lower profile compared with the previous action plan, although multiple strategic targets for organic markets are defined with the aim to increase production, processing, consumption, co-operation and international competititveness.

TARGETS

	PERIOD	LAND AREA TARGET	OTHER TARGETS
Previous Action Plan	2014-20	18% of UAA by 2020	20% regular consumers, 30% childcare institutions, 3x exports by 2020
Current Action Plan	2023-30	23.5% of UAA by 2030 (in CSP)	14% agricultural output value, 20% regular consumers, double processing value, increase exports to 7.5% of total by 2030

KEY ACTIONS

	PREVIOUS ACTION PLAN (2014 - 2020)	CURRENT ACTION PLAN (2023 - 2030)
PRODUCTION	Investment and area support, incl. animal housing, greenhouses, irrigation, machinery, orchards, aquaculture	Investment and area support
MARKETS	Investment aids for processing, grading, packing, storage, distribution facilities; support producer groups for input purchasing, product marketing; increased range, regional networks, supply chain collaboration; information, guidelines for public procurement/school fruit & milk; regional tourism maps, information for caterers; information on export opportunities; establish effective control system incl. International co-operation	Investment aid for processors, distributors, support producer groups for input purchasing, product marketing, direct marketing, information days for market actors, caterers; 50% of schools serving organic food; multiple export initiatives: increase recognition of national and EU logos, support certification costs
INFORMATION	Information campaigns, materials for different audiences; communication of research results; awards for best products, producers, caterers, media articles; increased use of advisory service and information portal; professional training initiatives; increased coverage in schools and colleges; expand research and knowledge transfer capacities, EIP operational groups, international links; survey of market consumption, prices, exports	Public information and promotion campaigns, internet platforms; review organic claims with experts to better tell story; school curriculum initiatives and farm visits; information days for producers, increase number of organic advisers and mentors and their training for different target groups; school, vocational and higher education initiatives; development of training materials; expanded research programme with stronger business links: mapping of key information and sources including statistics and market analyses

AQUACULTURE

The organic share of total aquaculture production in Estonia is negligible. Estonia was not included in our analysis of the EMFF (2014-2020) and EMFAF (2021-2027) operational programmes and the Multi-annual National Strategic Plan for Aquaculture. Investment aids for aquaculture were mentioned in the previous national organic action plan with more information-focused measures highlighted in the current OAP, including a feasibility study on organic aquaculture in Estonia. This study found no interest in conversion to organic aquaculture, leading to the cancellation of the relevant action points.

OrganicTargets4EU
www.organictargets.eu

Project Coordinator
Ambra De Simone
IFOAM Organics Europe
www.organicseurope.bio

Authors
Helga Willer
(FiBL, Switzerland)

Nicolas Lampkin
(Thünen-Institut, Germany)

Sabine Reinecke
(FiBL, Switzerland)

Design
CONSULAI

Publication year
2026

Funded by the European Union

Schweizerische Eidgenossenschaft
Confédération suisse
Confederazione Svizzera
Confederaziun svizra
Swiss Confederation

Funded by the European Union (Grant no. 101060368) and by the Swiss State Secretariat for Education, Research and Innovation (SERI) (Grant no. 22.00155). Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union, European Research Executive Agency (REA) or Swiss State Secretariat for Education, Research and Innovation (SERI). Neither the European Union nor any other granting authority can be held responsible for them.