



REPUBLIC OF ESTONIA  
MINISTRY OF AGRICULTURE

# BIOECONOMY STRATEGIES: ESTONIA CONTEXT AND SCOPE

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# THE STARTING POINT: NATIONAL LEVEL

- Decision:
  - the number of strategic documents must be reduced and the responsibilities of the state reviewed during the process
- Goal:
  - 49 strategic documents on national level (2017)  
→ 18 strategies covering the whole spectrum of state budget

# THE STARTING POINT: SECTORAL LEVEL

In the domain of **agriculture and fisheries** alone, the number of strategic documents has been overwhelming:

Eesti aiandussektori arengukava  
Eesti seemnemajanduse arengukava  
Kiimamuutuste leevendamise ja kliimamuutustega kohanemise tegevuskava  
Euroopa Merendus- ja Kalandusfond  
Eesti vesiviljeluse sektori arengustrateegia  
Põllumajandus, toidu- ja kalamajandusteaduse ning teadmussiirde arengukava  
Põllumajanduskultuuride geneetilise ressursi kogumine ja säilitamine  
Riiklik sordiaretusprogramm Eesti lihavesisektori visioonidokument  
Eesti toit  
Eesti piimanduse strateegia  
Koolipuuvilja ja köögivilja kava rakendamise riiklik strateegia  
Koolipiimakava rakendamise riiklik strateegia  
Põllumajanduslikud rakendusühtlused ja arendustegevus  
Euroopa Kalandusfond ja Eesti kalanduse strateegia  
Eesti vesiviljeluse mitmeaastane riiklik tegevuskava  
Taimkaitsevahendite säästva kasutamise tegevuskava  
Eesti teraviljasektori arengukava  
Eesti mahepõllumajanduse arengukava  
Eesti maaelu arengukava

All these will be brought together under **a common strategy for agriculture and fisheries (SfAF)**

# WHY A NATIONAL STRATEGY?

- **SfAF** will serve as the key document for **the state performance area of agriculture and fisheries** in the State Budget Act
- SfAF will give important input upon national level planning of **new programming period** (CAP, European Maritime and Fisheries Fund, Knowledge-Based Estonia, etc)
- SfAF contributes to a more efficient use and valorisation of **biological resources**, helps to **cope with changes** and alleviate risks

# NO BIOECONOMY STRATEGY?

- The strategic visioning and planning of Estonian bioeconomy will be programmed around **three** axis:

Sustainable Estonia 21

Estonia 2020

Principles of Estonian Security Policy

Public Health Strategy

General Principles of Climate Policy

Regional Development Strategy

Knowledge-based Estonia (RD Strategy)

Strategy for  
**Agriculture  
and  
fisheries**

Strategy  
for  
**Energy**  
sector

Strategy for  
**Forestry**

# GENERAL STRUCTURE (2017)

## Agriculture and Fisheries Strategy

Aim: To create opportunities for the development of competitive agriculture, fisheries, rural and coastal regions

### Plant and Animal Health, Food Safety

Objective: Healthy animals and plants, safe food

### Fisheries and Agriculture, Food, Rural Affairs

Objective: Estonian agriculture, food sector and rural areas are competitive and sustainable

### Fisheries and Aquaculture

Objective: Estonian resources are used in a sustainable way, which facilitates the development of competitive fisheries and aquaculture

Programme

Programme

Programme



#### Plant health

Plant production input is of high quality, crop production is safe to human and animal population as well as environment



#### Agriculture and food industry

Sustainable food industry that exports high added value products and uses innovative technologies



#### Recreational fishing and fish resource management

Environment friendly ecosystem-based management of water bioresources



#### Animal Health

Animals grown in Estonia are ensured welfare and good health, thus no export or sales restrictions apply



#### Environment protection in agriculture

Estonia has a clean environment, traditional agricultural landscapes and biodiversity



#### Professional fishing and aquaculture

Aquaculture and fisheries is competitive and efficiently managed economic sectors



#### Food safety

Food produced and consumed in Estonia is safe;  
Our consumer is knowledgeable in food safety



#### Development of rural life

Rural areas have viable living and business environment



#### Valorisation and marketing of water bioresources

No-waste and energy efficient valorisation of water bioresources into globally competitive high value added products

## „FINDINGS“ OF SFAF (1)

- Trends in bioeconomy to be considered when designing the future of agriculture and fisheries
- Make use of bioeconomy to reduce waste
- In plant breeding, consider the needs of bioeconomy
- To advance bioeconomy, implement policies that promote production of products with highest possible value added, using local resources in a sustainable way.
- To promote new bioeconomy clusters and greener business models

## „FINDINGS“ OF SFAF (2)

- **New value chains** (e.g. clean energy, bioeconomy, circular economy, ecotourism) are the key areas, which, by knowledgeable use (better use of regional resources and characteristics, novel production technologies, export of valorised products) and development can ensure a good economic growth in rural areas as well as maintain and create jobs also outside agriculture.
- It is increasingly important to **combine** various sectors and maximise resource efficiency, e.g. in bioeconomy, in which Estonia has a great, yet unused potential



# Input from sectoral strategies



Climate change

Strategy for mitigation and adaptation to climate change in agriculture

Organic Farming Development Plan

Plant and animal health



Integrated pest management

Crop Strategy

Seed Strategy



Horticulture Strategy

Dairy Strategy

Food safety

Resource efficiency

Development Plan "Estonian Food"

Meat cattle Strategy

Animal health

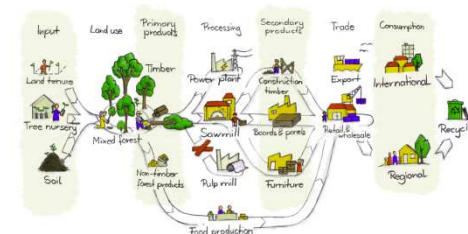


Waste management

Sustainable Plant Protection

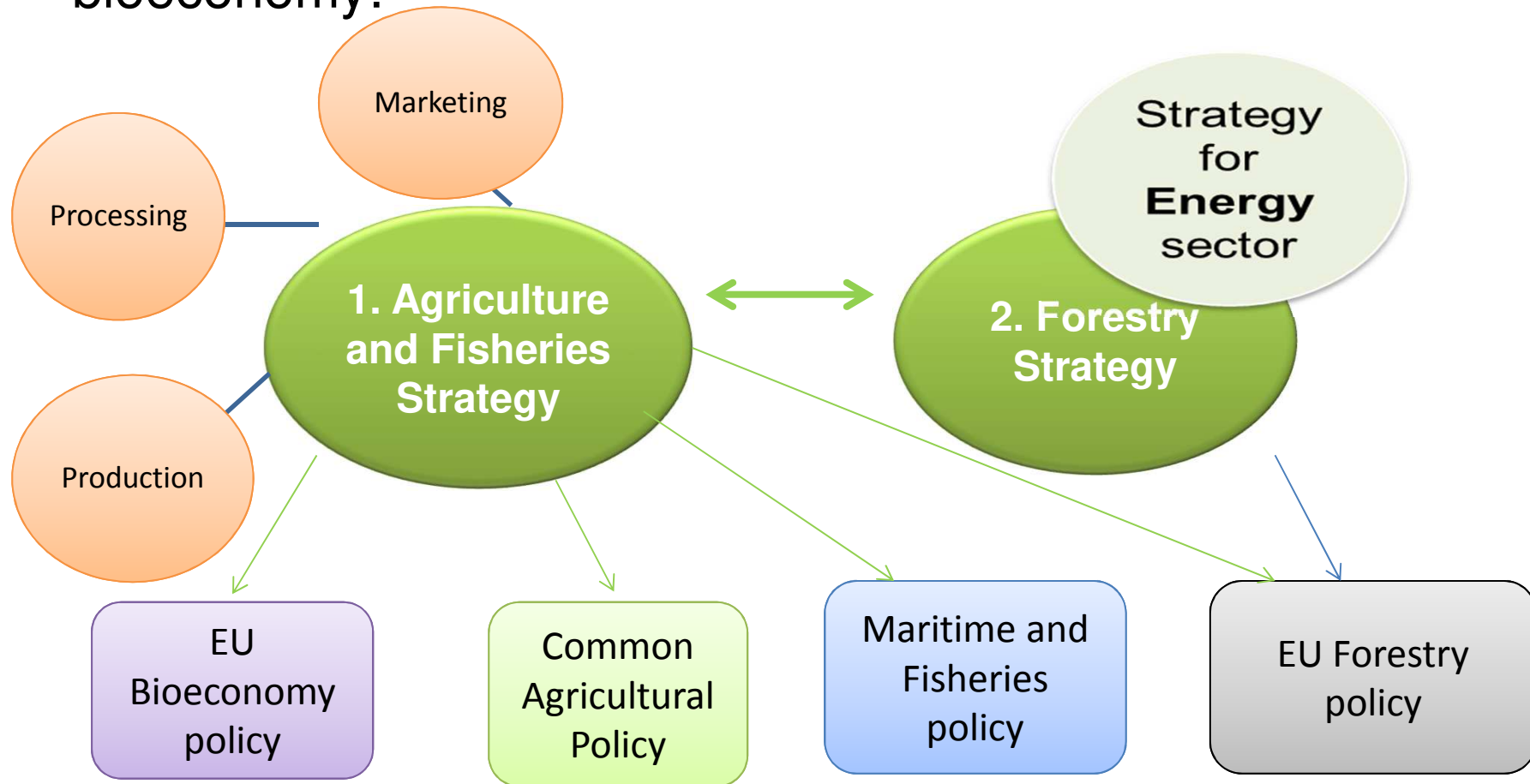
Value chain

Plant health



# EXPECTED OUTCOME

Estonia will have **three** major strategic documents related to bioeconomy:



# CROSS-SECTORAL CONTEXT: INTERMINISTERIAL BIOECONOMY PROJECT

An interministerial applied research project on bioeconomy (2018-2021) will

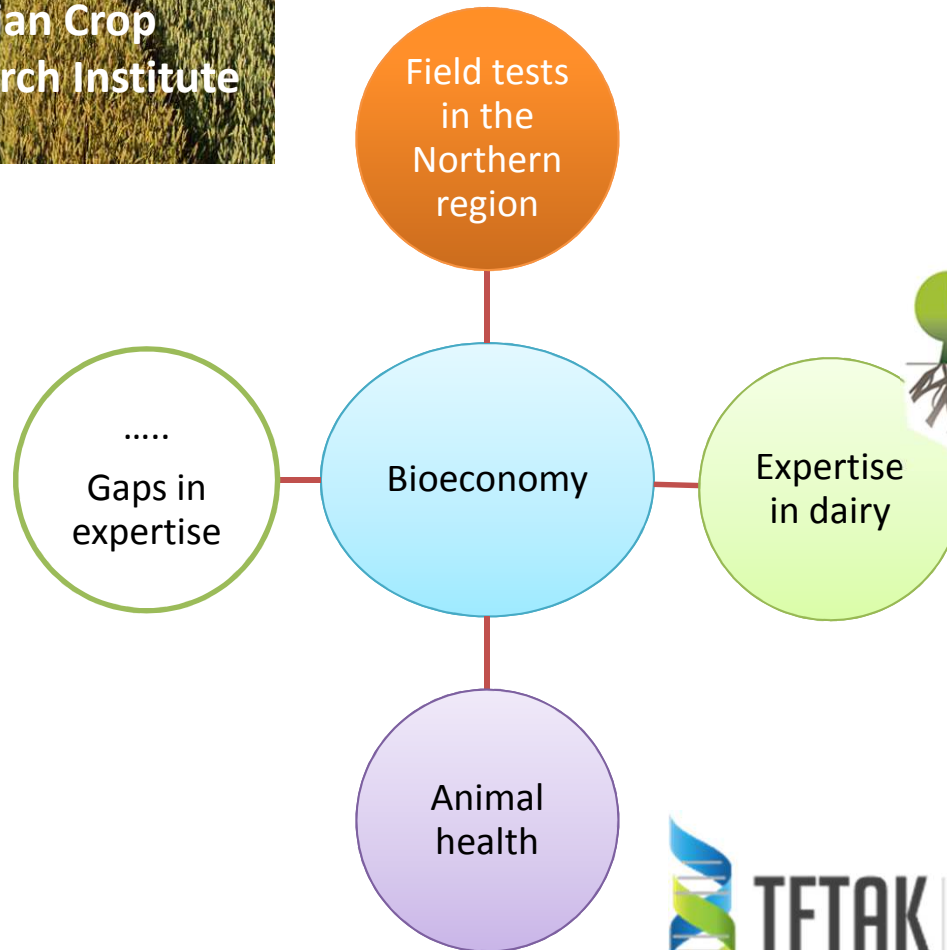
- analyse the **status** of Estonian bioeconomy sectors and value-chains
- propose **future scenarios** for bioeconomy development
- develop potential **business models** in selected sectors: marine resources, fuels and energy, food and feed, biomaterials, chemicals, pharmaceutical and plastic products
- propose **government measures** and actions for the development of bioeconomy
- ✓ It's a **co-developed** project **concept** (Ministries of Rural Affairs, of the Environment, of Economic Affairs and Communications)
- ✓ supported by funding scheme **RITA** aimed to strengthen the ministries' capability of commissioning applied research

# MACROREGIONAL CONTEXT: BIOEAST

- An initiative to facilitate **bioeconomy strategies in CEE** countries
- It will foster the **macroregional cooperation** of the participating countries; by means of collaboration, the **macroregional competitiveness** is expected to increase (e.g. better access to funding)
- As the initiative sets emphasis on **intraministerial** approach, participation in the initiative will also improve the cooperation among ministries within the country
- In Estonia, besides the ministries, our key partner is the **Estonian University of Life Sciences**. The Development plan of Estonian University of Life Sciences for 2016–2025 is based on the principle of bioeconomy.



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CENTRE OF EXCELLENCE



Bio-Competence Centre of  
Healthy Dairy Products LLC



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AND FERMENTATION  
TECHNOLOGIES

# EU CONTEXT: NEW CAP AND BIOECONOMY

- The approach towards bioeconomy shall be systematic and comprehensive, coherence across various sectors is crucial.
- Bioeconomy to be considered when setting the priorities for the [CAP Strategic Plan](#).
- Information about new and existing innovative solutions must be disseminated, especially on primary producer level.
- Small industries and local biorefineries that use local resources need support.

# EU CONTEXT: HORIZON EUROPE AND BIOECONOMY

- Cluster 7 of the [Horizon Europe](#) has great potential in strengthening the multi-actor approach and, thereby, boosting bioeconomy.
- [Multi-actor](#) projects promote innovative and competitive bioeconomy.
- CEE countries have not been too successful in finding funding opportunities; this capacity needs improvement.
- Smaller businesses developing biorefining solutions at local level need better access to Horizon Europe.



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Thank you for your attention!

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