

Feedback on Qualitative Mapping

Qualitative mapping of FNS relevant policies/strategies

Present situation

Estonian Ministry of Rural Affairs is starting a new strategic planning period 2020–2030 and it means also that the results of ongoing ex post policy/regulatory impact assessment, new strategic visions, goals and targeted socio-economic, environmental and governance impact indicators will be under discussion from 2018 to 2019. It will be a period of open policy debates in the conditions of political uncertainties, which are related to the BREXIT, reforms of EU Common Agricultural Policy 2021+, Estonian general elections in March 2019, etc

Ambitions

- to be a country with **competitive** and **sustainable** agriculture, fishery and food sector and rural areas, that would export goods with high added value by
 - encouraging sustainable growth in the productivity and the competitiveness of agri-food companies, in order to offer good quality food for domestic consumers and to successfully export food products to foreign countries
 - supporting innovation cooperation between enterprises and academia
 - using of new bio-resources in food production
 - improving the competitiveness of organic farming
 - promoting the consumption of local food
 - enhancing the co-operation between food sector parties and developing new export opportunities for agri-food companies
 - developing efficient and sustainable supply chains from primary production to the final consumer
 - creating a suitable environment for food security and nutrition with achieving greater transparency on agricultural markets to curb extreme price fluctuations and their impact on food security and nutrition
 - encouraging innovative solutions , efficient and sustainable use of resources – for a more innovative food industry by using new technologies, digitalization etc
 - reducing food waste by optimising the use of underutilised and waste material
 - encouraging the improvements in aquaculture – efficiency, sustainability and health
- ensure that Estonian population has a supply of **safe** and **nutritious** food and consumers have enough information and knowledge to make informed choices by
 - maintaining good food safety, animal health and welfare situation
 - improving the collaboration between ministries, for example One Health Approach in national AMR action plan
 - focusing on healthy eating and reducing overweight and obesity
 - developing the measures which support the reducing of alcohol consumption
 - managing emerging risks in food safety

- to have viable rural life;
- areas of agriculture, food sector, fisheries, food safety, rural life policies **are integrally managed** and **form a whole** in our national strategy for agriculture and fisheries
 - national strategy for agriculture and fisheries will cover different areas and create synergy between fields like agriculture and food market, export, fisheries, aquaculture, rural entrepreneurship and rural life, organic farming, food safety, food industry, animal health and welfare, plant health etc.
 - strategy is based on bioeconomy principles

Gaps

- In the context of one-government-approach (OECD 2013) Estonia is developing the horizontal cooperation between ministries
- need for more innovative solutions in food industry, innovations in combined (example multitrophic) aquaculture
- use of digitalization opportunities, apply biotechnology and ICT in the blue bioeconomy
- new bio-resources, new technology, new products
- sustainable supply chains and cooperation in the chain
- low capacity of enterprises (especially SME-s) to use R&D in their business/undertakings
- need to increase the export of processed food products

Specific situation

- FBO-s are mostly small and microenterprises
- Technically rather advanced primary production
- Comparatively low level of use of plant protection products and fertilisers
- Relatively low consumption of fish

Date: *January 2018*