

Ministry of Agriculture

Estonian dairy strategy

2012-2020

Tallinn 2012

Short summary

1. The EU new CAP will soon come into force, milk quotas will expire, the WTO is constantly liberalizing world trade. Those Member States for which dairy production is important (e.g. IRE, NL) attempt to plan strategically how to face the coming changes and to use the concurrent opportunities for dairy development.
2. For Estonia, dairy production is important. Every third euro of agricultural income comes from milk. Every third euro reaching rural area through agriculture comes from milk.
3. Estonia has favourable preconditions for milk production, there is demand for Estonian milk products on nearby markets. The strategic goal is to convert those preconditions into moderate growth, adding a third to the present production.
4. Milk production enables to maintain human settlement on a big part of Estonian territory, the small-scale industry which has found its own niche could (also by organic products) bring people to the country and take the products directly to consumers by means of short supply chains.
5. Only competitive milk production and processing can survive. This means scientific innovations in cooperation with agricultural research in the fields of feeding, animal breeding, food technology, product development and economy.
6. Joint activity and vertical cooperation are important both for small- and large-scale production, in order to balance negotiation power between the different links of the chain and to improve market access.
7. Better than until now Estonia should use the opportunity to increase product value. Higher value added provides additional income both in export and on domestic market, where the more active dialogue with consumers shows the way to product development, which reaches its climax in functional products.
8. Updated production with new animal housing and milking methods gives rise to new problems which should be observed very closely, increase in milk production requires high cattle herd reproduction rates.
9. The measures used so far which were dedesigned in view of the whole chain have justified themselves.
10. The problem analysis and purpose setting of the strategy can be used as an input in the new RDP 2014–2020.
11. The value added of strategic planning is the key to a more resultative dialogue between all the participants in milk production chain. The dialogue should continue during strategy implementation. Better understanding of the role of all participants in the promotion of milk production should contribute to the implementation of the strategy.
12. The strategy concentrated on some twenty or thirty pages includes situation analysis, problem notification, purpose setting and the table of objective-targeted measures. The annex comprises a voluminous analysis produced by the Estonian University of Life Sciences and comparative data of other milk producing countries.

Contents

Used abbreviations and definitions	4
1. Objective of the strategy	6
2. Vision	Error! Bookmark not defined.
3. Short overview of the status of the sector and of milk production and processing problems.....	Error! Bookmark not defined.
4. Strategic objectives	24
5. Measures and activities	25
6. Conformity with other development plans	37
Annex 1. Analysis of the strengths, weaknesses, opportunities and threats of the sector (SWOT).....	37
Annex 2. Dairy strategy background survey and the FAO estimation of global food and milk security.....	37
Annex 3. Implemented support measures	37

Used abbreviations and definitions

EAS – Enterprise Estonia

EC – European Commission

EKI – Estonian Institute of Economic Research

EU – European Union

EMÜ – Estonian University of Life Sciences

ETF – Estonian Science Foundation

HTM – Ministry of Education and Research

Sustainable food production – competitive production and processing of agricultural products directed by market economy, helping to improve living conditions and employment opportunities in rural areas, to follow environmental sustainability and to maintain natural habitats, biological diversity and landscapes.

Value added products, consumer products – milk products directed at final consumer

Value added – an amount added to the value of a product in any production or general turnover process, reflecting in increase in the price of the product and covering profit and all labour and capital costs in the turnover link

RDP – Estonian Rural Development Plan 2007–2013. The RDP measures:

1. 1.1 – Training and information activities
2. 1.2 – Setting up of young agricultural producers
3. 1.3 – Support for advisory system and services
4. 1.4.1 – Investments into the development of micro agricultural holdings
5. 1.4.2 – Investments in livestock buildings
6. 1.6.1 – Processing of agricultural and non-wood forest products
7. 1.6.2 – Adaptation of the dairy sector and organic farming to new challenges and the promotion of the joint processing of agricultural products
8. 1.6.3 – Promotion of the joint marketing of agricultural products
9. 1.7.1 – Cooperation in the development of new products, processes and technologies in the sectors of agriculture, food and forestry
10. 1.7.3 – Communication and promotion activities related to the products produced under food quality plans
11. 1.8 – Infrastructure of agriculture and forest management
12. 1.9 – Setting up and development of producer groups
13. 2.1 – Support for less-favoured areas
14. 2.2 – Natura 2000 support for agricultural land
15. 2.3 – Agri-environmental support
16. 2.4 – Animal welfare: support for animal grazing
17. 3.1 – Diversification of the rural economy
18. LEADER-measure – connections between different rural economy development activities

MKM – Ministry of Economic Affairs and Communications

Milk Package – motions to amend Regulation No 1234/2007, proceeding from the conclusions of a special High Level Group set up in 2009

PMAN – Agriculture and Rural Development Council

ARIB – Agricultural Registers and Information Board

SA – Statistics Estonia

SPS Agreement – the WTO Agreement on the Application of Sanitary and Phytosanitary Measures

R&D – research and development

Research and development – systematic basic research, applied research or experiments and development, of which the objective is to improve knowledge and to use this knowledge for the development of new applications (both new and improved products and processes)

Product development – acquisition, linking, designing and use of the existing scientific, technological, business and other relevant knowledge and skills with a view to make plans, arrangements or projects for new, changed or improved products, processes or services

TBT Agreement – the WTO Agreement on Technical Barriers to Trade

SME – small and medium-sized enterprises

VM – Ministry of Foreign Affairs

VTA – Veterinary and Food Board

CAP – Common Agricultural Policy

1. Objective of the strategy

The objective of Estonian dairy strategy is to increase the volume of milk production and processing and to ensure sustainability by the year 2020. To this end, present economic status of Estonian undertakings operating in the field of milk production and processing will be mapped, the further possible development trends of the dairy sector found out, the vision for the year 2020 put in words and the measures necessary to achieve the strategic objectives described.

2. Vision

Estonian sustainable and competitive dairy sector is oriented toward the production of high value added milk products meeting market demand (incl. increasing volume of organic products) and toward export, supported by vertical and horizontal cooperation.

In 2020, Estonian dairy sector is oriented toward joint activity, creates high value added (incl. health promoting biotechnological products), a big part of those products is exported and the volume of farm dairy and organic products is increasing. Milk production has maintained its priority in the sector of agriculture. Increase in competitiveness, regional and structural balance of production and sustainable production practices concurrent with higher production and processing efficiency ensure the sustainability of the dairy sector. Sector employment is guaranteed and the efficiency of production and processing increases thanks to the application of new technologies and knowledge. The system of in-service training and retraining has been developed and applied in the dairy sector. The educational institutions teaching the specialties needed for agriculture and food industry have high level and are popular among the youth. Crisis backup measures have been developed for crises and epidemic outbreaks.

In vision formulation, the following presumptions about the situation in 2020 were considered:

1. Due to growing global population and changing nutritional habits, demand for milk products will increase on more open global markets and purchasing power and consumption will grow on domestic market.
2. In the EU, there are no restrictions on milk production. The EU and national subsidies (incl. export subsidies) have either expired or substantially decreased, the EU and national system of crisis measures have been developed (incl. an insurance system, preventive and disease-control measures, measures to fight market failures and economic crisis).
3. Climate change exacerbates food production in many regions of the world and to some extent may even begin to influence agricultural production conditions in Estonia.

4. Estonia is moving toward environmentally friendly production (incl. organic production) and growing organic food markets are gaining popularity.
5. In Estonia, urbanisation is losing its attractiveness, some city residents go back to the country, but most of them will not be engaged in agriculture. The number of people directly involved in milk production and processing may still decrease.
6. The EU internal market (incl. Estonia) will still be the most important market. Russia is one of the export markets with the best potential, at the same time export opportunities to markets outside the EU have improved.
7. Balanced and sustainable development of the whole supply chain and not only the continual concentration of the dairy sector is the key to the success of the field of dairy.

3. Short overview of the status of the sector and of milk production and processing problems

Description of the situation (see also Annex 2 Dairy strategy background survey, Estonian University of Life Sciences 2011)

Economic importance

Estonian economy, incl. the sectors of agriculture and food industry, has developed considerably during the period 2001–2011 – it has passed the phases of growth, bubbling, abrupt economic decline and restoration of economic growth. Milk producers and dairy plants have passed all the phases of general economic growth and have been able to maintain their position and even improve it to some extent during the years of economic crisis.

The dairy sector has contributed considerably to Estonia economy. Food industry is still one of the most important branches of processing industry (in 2010, the turnover of food industry made up 14% of the total turnover of processing industry), dairy industry is the leading branch of food industry (in 2010, the turnover of dairy industry made up 30% of the total turnover of food industry). Considering the fact that 20 years ago twice as much milk was produced as today in Estonia and regarding growing global demand for food, Estonia has potential to increase the production of milk and milk products and to enlarge exports. The dairy sector has an opportunity to raise the total value of production on the one hand relying upon tradition and on the other hand upon its capability to develop both by increase in the volume of production and in the value added to raw material.

The present forecasted increase in the volume of milk production would bring about even bigger economic impact. It can be estimated that in 2012–2020 increase in the volume of milk production by a third will cause an additional need for investment within the range of 200–300 million euros, bringing about the same level of tax revenue.

By the current average milk yield and in order to increase milk production by a third the number of dairy cows must be increased by 33,5 thousand animals, this can bring about the need for max. 67 thousand hectares of agricultural land (presuming that the land quality rating will be the same). Presuming that the average milk yield may increase by up

to 19% by the year 2020, we may need only 12,2 thousand additional cows, which would mean that about 25 thousand hectares of additional agricultural land would be required.

We must also be ready for substantial global increase in the price of the feed used to produce milk. This is related to growing global food demand, which can bring about increase in production costs as well as the need for additional agricultural land and for bigger than planned increase in the number of dairy cows.

Producers

The number of enterprises engaged in milk production has decreased rapidly in Estonia. During 2004–2011, the number of milk quota owners decreased by 54,6%. At the same time, if in 2004 an Estonian milk quota owner had 244,8 tons of milk quota on an average, the respective number was 647,2 tons in 2011. In Estonia, concentration of dairy industry (partly due to historical reasons) is higher than in the other Baltic states and Finland. 84,5% of milk is produced by only 20% of producers and 80% of producers produce only 15,5% of milk. Regionally, milk production has mainly concentrated to Central and Eastern Estonia (figure 1). And as a rule, growth of production is bigger in those regions where it was bigger earlier. Production concentration follows the logic of economic conditions.

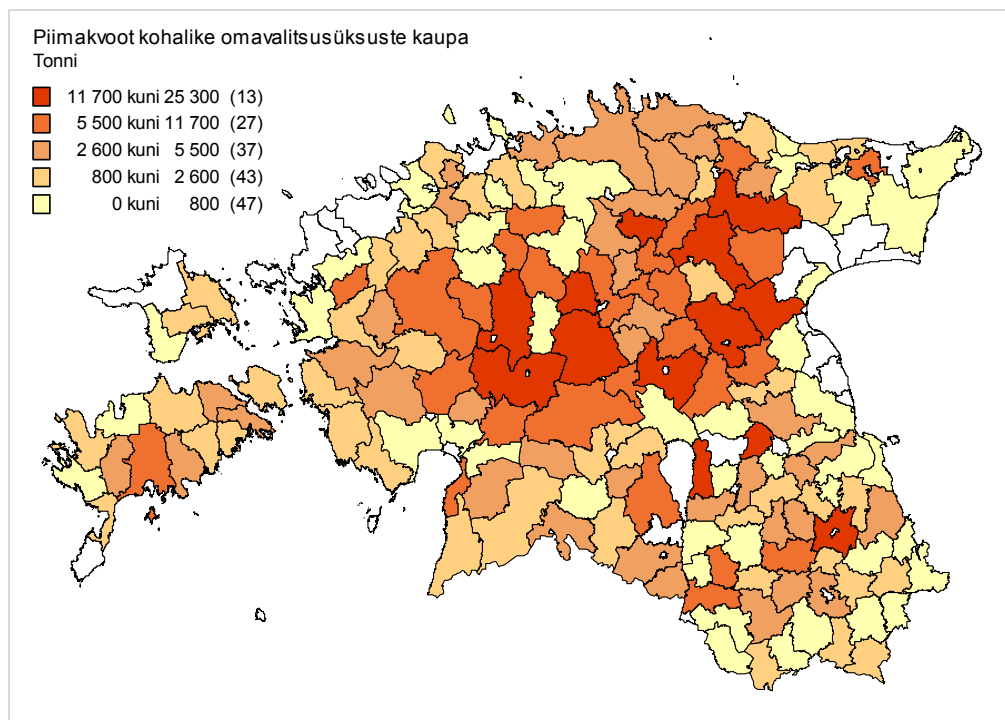


Figure 1. Milk quotas by local governments as of 01.04.2011.

Source: drawn up on the basis of ARIB data (2011).

On the basis of the trends of the last ten years we can distinguish between two viable milk producers' size groups in Estonia – smaller producers with the herds of 51–100 dairy cows and bigger producers with the herds of more than 300 head of cattle (figure 2). In all other size groups, the number of herds and the quantity of produced milk has continually decreased. The herds with more than 300 head of cattle have a bit more than a half of Estonian dairy cows but they produce about two thirds of total milk. As of 2010, a Finnish farmer with 30 dairy cows was regarded as a viable milk producer, in Latvia and

Lithuania cows were concentrated into the herds of 10 and more head of cattle. Thus, Estonian milk producers have better advantages to achieve scale effect.

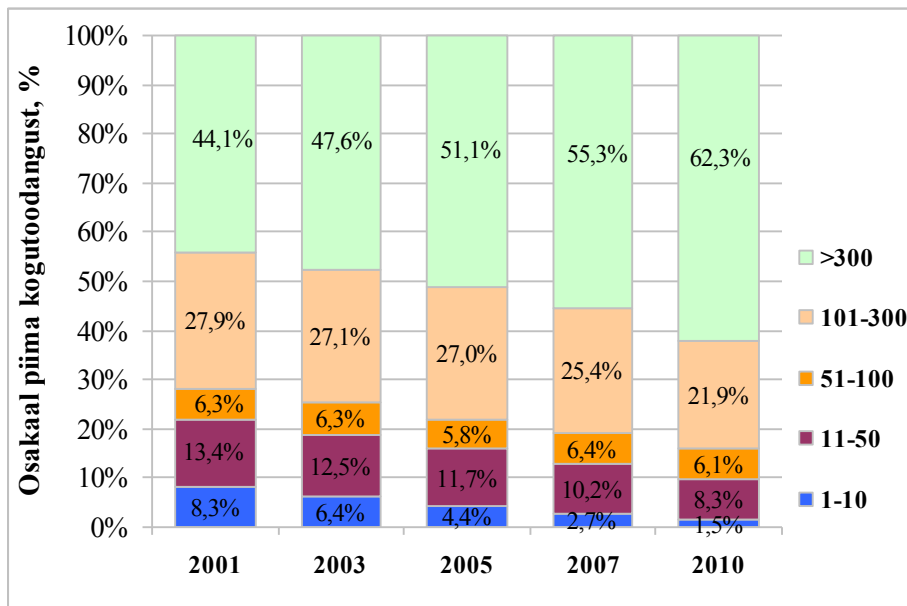


Figure 2. Share of herds of different size on the basis of milk production in Estonia during 2001–2010.
Source: SA.

On the background of the general trend of decrease in the number of dairy herds, milk production can only increase through the enlargement of the existing milk producers and through increase in the productivity of dairy cows. The objective of the strategy to increase milk production by a third by the year 2020, compared to the year 2011, can be achieved by increase in the number of cows by 12,2 thousand animals or 12,6% and by increase in the average productivity by 1,36 tons or 19,1%.

In Estonia, the average value of assets owned by milk producers per one dairy cow in 2009 was 6 400 euros on an average. During the last ten years, Estonian milk producers have invested into livestock buildings, farm equipment and cultivation technique. At the end of 2011, dairy sheds were reconstructed and built in 182 production units. In all, those cowsheds have about 53 000 places, of which about 1 670 places or 3,2% have not been occupied. Thus, the new and reconstructed cowsheds do not have considerable reserve for the enlargement of the dairy herd. The remaining bigger cowsheds originate from the 1960ies up to the 1980ies. Besides, it has to be considered that mainly dairy sheds have been built and reconstructed. The number of new or reconstructed young cattle sheds is considerably smaller.

In enterprises with reconstructed or new dairy sheds the productivity of cows is above average. Although those enterprises own 52,8% of dairy cows, in 2011 their total milk quota quantity made up 63,8% of the distributed milk quota. Thus a bit more than a half of dairy cows are kept in new or reconstructed sheds and those cows produce about two thirds of Estonian milk production.

Considering that 53 thousand dairy cow places have been reconstructed, in case of the present average milk yield 77,3 thousand dairy cow places should be built or reconstructed in order to increase milk production by a third. If the productivity of cows will increase by up to 19% by the year 2020, 56 thousand dairy cow places should be built or reconstructed in order to achieve the same volume of production.

Therefore, additional investments into buildings, machinery and equipment within the range of ca 168 million euros (in case of 56 thousand additional places) to ca 232 million euros (in case of 77,3 thousand additional places) would be needed. In addition to the above mentioned costs, investment should also be made into animals which in case of breeding stock would be ca 14 to 37 million euros.

Transition to new technology has contributed to increase in productivity and enhanced milk producers' competitiveness. At the same time, new technology has its disadvantages:

- producers' debt load is relatively big. In 2010, liabilities made up 54,1% of bigger producers' assets and debt coefficient exceeded the critical level in case of 15,7% of bigger milk producers. Therefore, they are vulnerable to price volatility. Besides, price volatility has increased on the world market in the last years.
- in ten years, the average age of the cows removed has decreased by 1,3 years. This means that the average number of lactations and progeny per dairy cow has also decreased. Therefore, the importance of costs related to herd reproduction has increased and this can increase the cost price of milk and weaken the competitiveness of Estonian milk producers.
- in 2001–2010, the importance of extremities diseases, traumas and metabolism diseases as the reason for the removal of animals increased.

„Food crisis“ and the concurrent fall in milk purchase prices had their impact both on the milk production of Estonia and other countries. The relatively smallest decrease in milk production could be observed in Lithuania in 2007–2010. This can be one of the reasons why Lithuanian dairy plants are more interested in the import of raw milk from other countries. Ca 30% fall in milk purchase prices in 2009 was followed by ca 5% fall in milk production volume. In 2010 and 2011, market was favourable to milk production which has been raised to the level of 2008.

The number of dairy cows which has been decreasing in Estonia over the last 20 years has constantly been 95,5–96,7 thousand in the last three years (figure 3). The present size of dairy herd will enable certain increase in milk production, provided that the average milk yield will also increase.

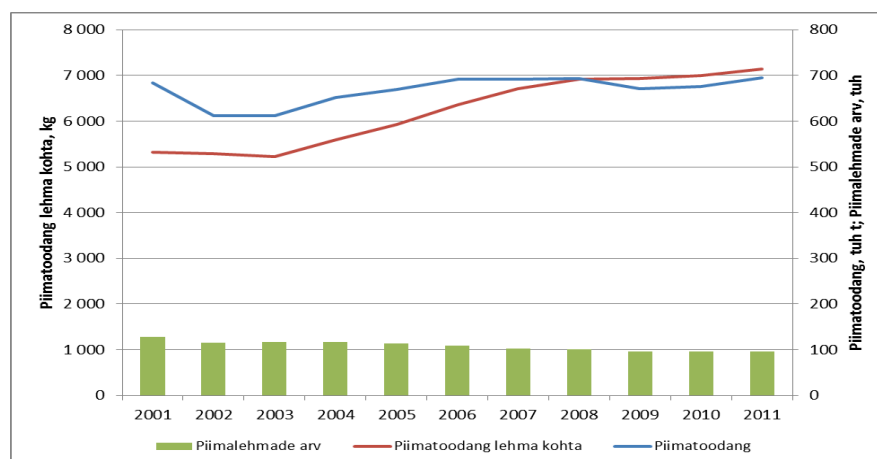


Figure 3. Number of dairy cows, milk yield per cow and milk production in Estonia in 2001–2011.

Source: Eurostat (2012).

Thanks to increase in the average milk yield, milk production has not changed much in Estonia in the last ten years. In 2001–2010, milk yield increased by 36,1% in Estonia. Aiming at rapid growth in the average milk production is one of the reasons why the

average dry matter content of milk has decreased in Estonia and is smaller, compared to the other Baltic states and Finland (figure 4). For dairy plants, it brings about bigger transportation costs per 1 kg of dry matter and bigger raw milk and equipment handling costs to produce 1 kg of finished products. 675,4 thousand tons of milk produced in Estonia contained 49,8 thousand tons of dry matter (7,37%) in 2010. If in Estonia the average dry matter content of milk had been the same as in Finland (7,74%), 643,1 thousand tons of milk (4,8% less than the actual milk production in 2010) would have been sufficient.

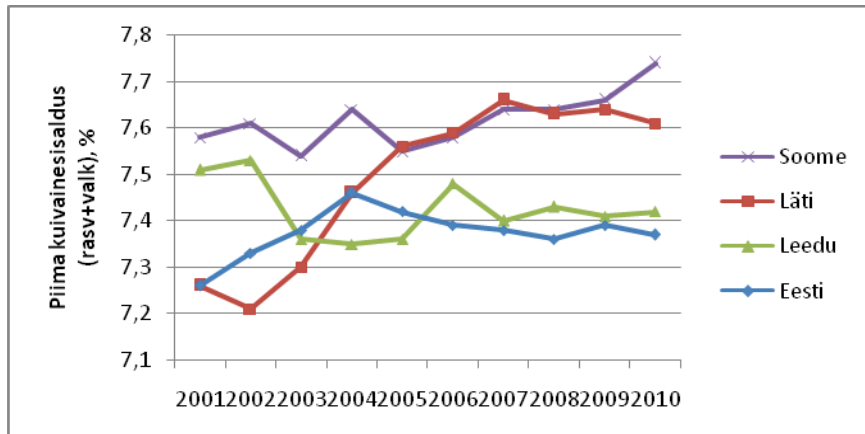


Figure 4. Average dry matter content of milk in the Baltic states and in Finland in 2001–2010.

Source: Eurostat (2011).

In 2010, milk quota owners included 92 organic producers and the total milk quota in their ownership made up 2,4% of the distributed milk quotas. Nevertheless, in Estonia organic milk processing has not caught up with growth in organic milk production volume and a big part of organic milk is processed with regular milk. In 2009, about 20% of organic milk reached consumer as organic milk product. In 2009, the consumption of organic milk and milk products made up 0,5% of the total consumption of milk and milk products. Mainly small milk handlers are engaged in the production of organic dairy products.

In Estonia, milk production costs per 1 kg of produced milk and per 1kg of milk dry matter are by 6,7% and by 9,9% higher than in Latvia. Compared to the respective figures in Lithuania, costs per 1 kg of milk dry matter are by 53,9% higher in Estonia but by 38,7% lower than in Finland. Compared to the other Baltic states, wages costs included in milk production costs are considerably higher in Estonia (figure 5). The difference has been caused by the different structure of milk producers. In Estonia, the share of the so called larger mainly paid labour-based producers is bigger. In the other Baltic states and in Finland, we mainly deal with family farms where farmers are usually not in the habit of paying themselves and the profit must also cover labour costs.

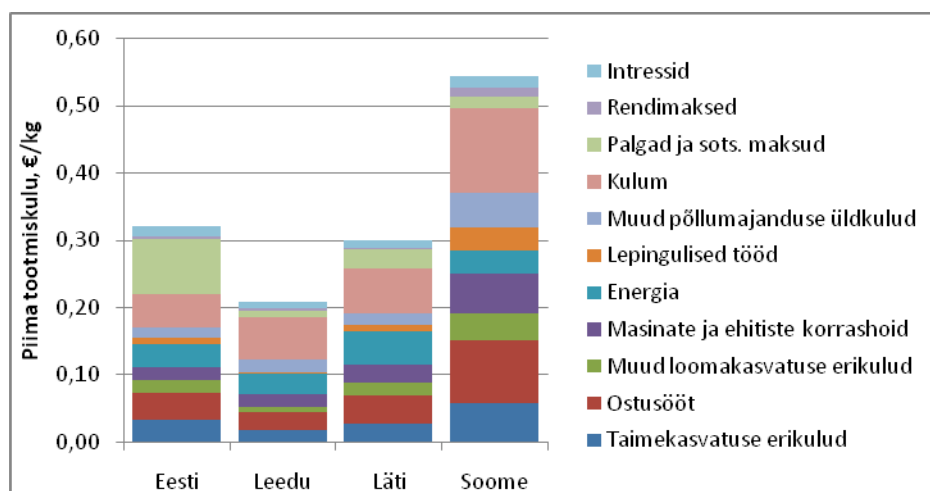


Figure 5. Milk production costs in the Baltic states and in Finland in 2009, euros/kg.
Source: FADN PublicDatabase (2011).

In the Baltic states and in Finland, the seasonality of milk production decreased in 2001–2010. In Finland it was the lowest in 2001 (1,17) and stayed low in 2010 (1,13). In the last ten years, the seasonality indicator of Estonian milk production has approached the Finnish level.

In addition to traditional milk production, goat breeding, incl. goat milk production has indicated positive development. Both the number of goat keepers and goats has grown and as of 2011 about 500 goat breeders owned 1431 milk goats in Estonia. Grassland hectare-based support for goat breeding (considering stocking density) can be a favourable reason of growth in the number of goats. Compared to cow keeping, goat breeding suits better for small-scale production and provides the cow keepers with smaller herds with a good alternative. Although so far goat milk has mostly been produced for families' own consumption, a growing trend to produce goat milk products (milk, cheese, yoghurt, etc.) for sale has arisen. One small organic goat milk processing dairy has been approved by the Veterinary and Food Board. Production has been growing from year to year and the improved processing skills give us reason for thinking that goat breeding will become more market oriented and more products will reach the consumer.

Processors

Regardless of the fact that milk production has been relatively stable, purchasing and processing of milk has increased. In Estonia, the purchase of milk increased by 45,1% in 2001–2010, by 62,4% in Latvia and by 30,1% in Lithuania. In Finland, the quantity of purchased milk has decreased by 6,9% (at the same time, milk production decreased by 7,6%). Increase in the purchase of milk by the relatively stable milk production indicates that workers' security of payment and their professionalism have improved. Dairy cow keeping for own use and direct sale of milk by producers has considerably decreased. This is confirmed by the fact that the number of herds with 1–2 dairy cows has decreased most. By 2010, the share of purchased milk in produced milk grew to 92,0% in Estonia, the share of the dairy plants belonging to milk producers' cooperatives and other associations made up 60,2% of purchase.

In Estonia, the number of dairy plants has decreased in the last ten years and production has been concentrated. If in 2001 two bigger dairy plants processed 36% of purchased milk, by 2011 the share of two bigger plants had grown to 45% and the share of four bigger plants to 64%.

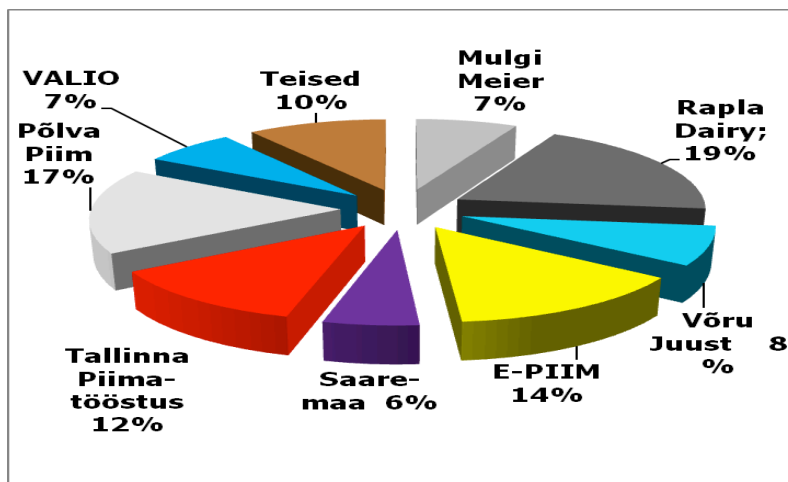


Figure 6. Purchase of raw milk in 2001.

Source: Estonian Dairy Association.

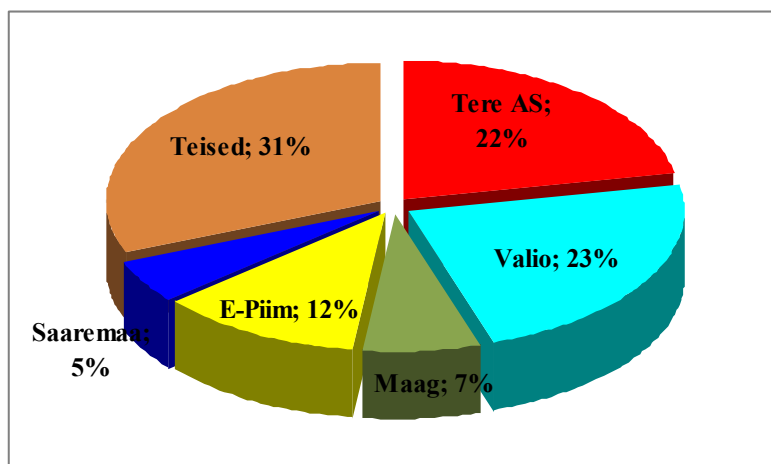


Figure 7. Purchase of raw milk in 2011.

Source: Estonian Dairy Association.

In comparison with Finnish dairy plants, the productivity indicators of the dairy plants of the Baltic states are much more modest. The average turnover of Estonian dairy plants per employee made up only a third of the Finnish respective figure in 2009. The respective indicator of Lithuanian and Latvian dairy plants in their turn was by a bit more than a third lower than the Estonian level. As for the average gross value added per employee, the states were almost at the same level. In 2009, Estonian indicator made up a bit less than a third of the level of Finland, Lithuanian and Latvian indicators made up 76% and 61% of the level of Estonia. At the same time, in the Baltic states labour productivity is higher than in Finland. If in Finland the value added produced by one employee made up 146,8% of personnel costs per employee on an average in 2009, the respective figure was 193,2% in Estonia, 199,1% in Lithuania and 159,3% in Latvia. Thus, in the dairy plants of the Baltic states the so called physical labour productivity is considerably lower than in Finland, but higher, considering the difference of wage levels.

In 2001–2009, the value added of Estonian dairy plants increased by 103,8%, the respective figures of Lithuania and Finland were 158,5% and 34,1%. Estonian, Lithuanian and Finnish dairy plants have also been able to increase the share of value added in product value and the share of the production of milk products in the value added of processing industry.

The low level of productivity indicators also refers to the need to put the results of research into production and processing practice more than done so far. This would enable to make the whole milk production chain more productive and resource saving.

The debt coefficient of Estonian dairy plants is relatively high. In 2006–2009, its value was 0,64–0,66 or a bit lower than the critical $2/3$. Thus, the aggregate debt coefficient of dairy plants is somewhat higher than the respective indicator of milk producers. Comparing the net profits of dairy plants and milk producers of the year 2009, when milk product prices and export levels were low, the net profit of dairy plants was 5,6 million euros, but the total net loss of 166 bigger milk producers was 19,3 million euros. In 2010, the net profit of Estonian dairy plants was 4,5 million euros and the aggregate net profit of 166 bigger milk producers was 24,0 million euros.

In the last ten years, Latvia and Lithuania have invested relatively more into the improvement of technological level than Estonia, but Estonian dairy plants in their turn have cut the difference between the technological level of Estonian and Finnish dairy plants. The bigger investment need of Latvia and Lithuania can be justified with the lower initial technological level of their industry, particularly in comparison with Finland where investment need is lower.

Today, Estonian dairy plants use ca 70–80% of their total capacity. Estonian dairy plants would be able to process ca 790 thousand tons of milk a year. Considering the total milk production, it would mean the production capacity of about 830 thousand tons. It can be concluded that for the time being the processing capacity of dairy plants is not an obstacle to the development of milk production in Estonia. At the same time, a big part of the powder equipment used in Estonian dairy plants originates from the years 1968–1996, milk pre-processing and heating equipment from 1995–2005 and technological tanks from the 1970ies. Thus, some equipment and production lines are obsolete and non-effective and should be replaced in order to increase the technological level and competitiveness of dairy plants.

In Estonia, it is difficult to estimate the volume of investments necessary for the processing of the quantity of milk which is by a third bigger than so far. According to estimates, the present processing capacity of dairy plants corresponds to ca 830 thousand tons of milk production (considering the 95% share of processed milk). Considering that the milk production targeted at in the strategy exceeds the current capacities of dairy plants by 100 thousand tons and the average value of the fixed assets of the plants is 212 thousand euros per one thousand tons of milk and presuming that for the processing of an additional quantity of milk linear increase in fixed assets will be enough, dairy plants should additionally invest ca 21 million euros by 2020.

At the same time, in 2005–2010, the enterprises engaged in the production of milk products invested into fixed assets 18,3 million euros a year on an average. Thus, the total investment needed to increase processing capacity approximately corresponds to dairy plants' usual investment volume of 14 months. As this estimate is based on the existing data and technology, it can be presumed that considering the need for increase in technological level and productivity the actual additional need for investment is considerably bigger than the calculated 21 million euros in the sector of milk processing. This is confirmed by milk processors' expert estimation according to which the optimum sum to be invested into milk processing is 15 million euros a year.

Within years, the profile of the products of dairy plants has also changed. The production of cheese, consumer products and whey powder has increased. The production of skimmed milk and milk powders and butter has decreased. The share of final products has

also decreased, for instance it has been estimated that 30% of produced cheese is packaged into small packagings.

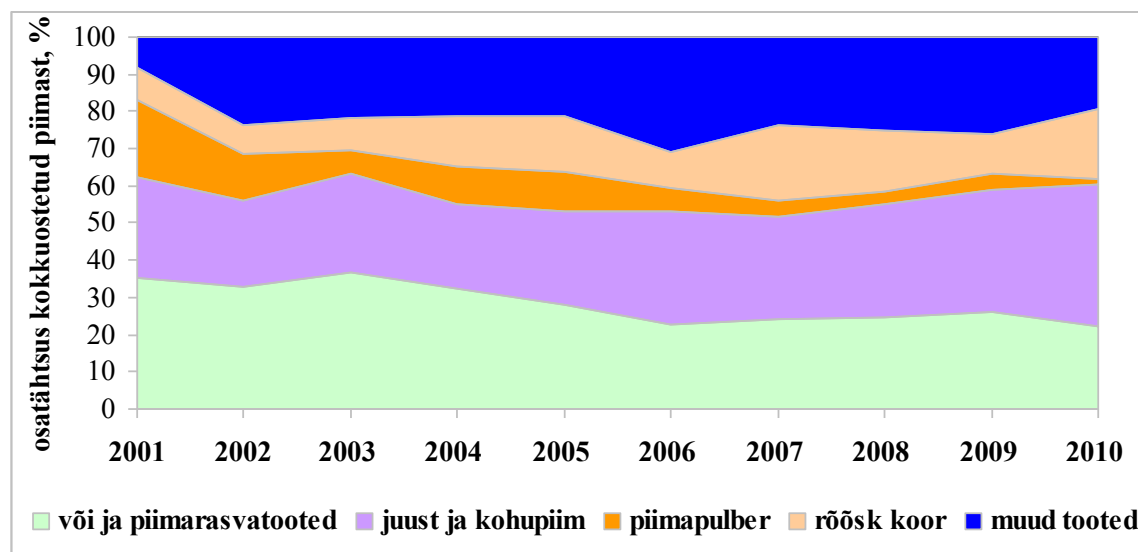


Figure 8. Use of milk in milk products in 2001–2010.

Source: SA.

At the same time, powder and butter prices are volatile and this determines the respective volume of production. In 2011, butter prices were higher than cheese prices and the value added of butter was high.

Export

Estonia is a net exporter of milk products. In the years of more favourable market situation, the net export value of milk products has been about 100 million euros (figure 9). In Estonia, the export volume has continually increased but increase has been even bigger in Lithuania. The raw milk exported from Estonia, upgraded in Lithuania and exported has also contributed to that.

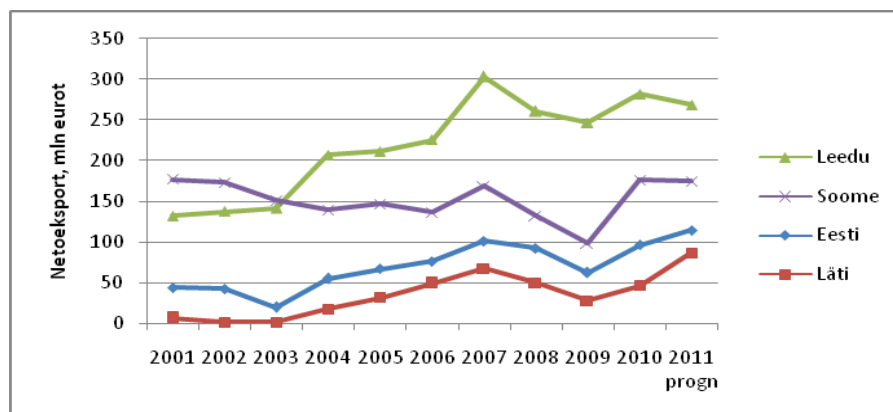


Figure 9. Net export of milk products in the Baltic states and Finland within 2001–2011 (the indicator of 2011 has been forecasted on the basis of the data of 10 months), million euros.

Source: Eurostat (2011).

Figure 10 indicates that against the background of the general negative foreign trade balance for agricultural products the foreign trade balance for milk products remains positive.

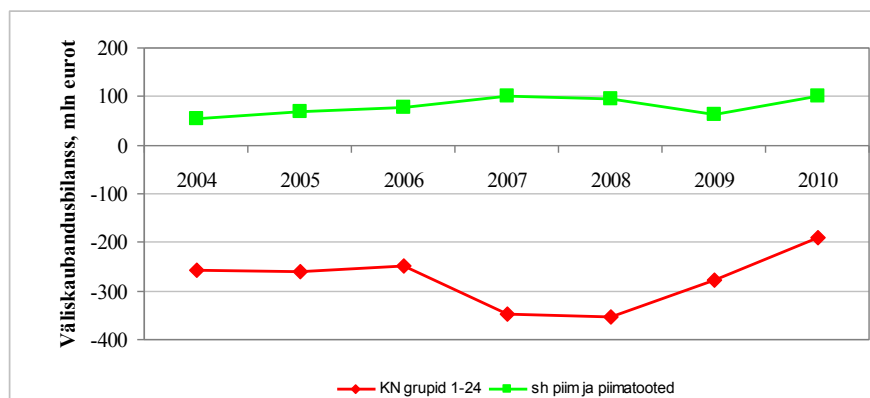


Figure 10. Foreign trade balance for agricultural products (KN groups 1–24) and for milk and milk products, million euros.

Source: SA

In the export structure of Estonian milk products, the share of cheese has grown considerably but the share of powders and butter has decreased (figure 11). The importance of fermented products and whey powder has also increased. In the last years after the extremely low milk purchase prices of the year 2009, export of raw milk to Latvia and Lithuania has grown. To some extent, it has decreased the export of cheese and powders as well as the average processing level and value added of Estonian exported milk products. In the long run, it would be more useful for Estonian economy to add value to Estonian milk on the spot and to export value added products. According to estimates, due to the export of raw milk dairy plants lose 29,4 million euros of additional sales revenue and the export turnover of Estonian milk products is by about 9 million euros lower than it could be.

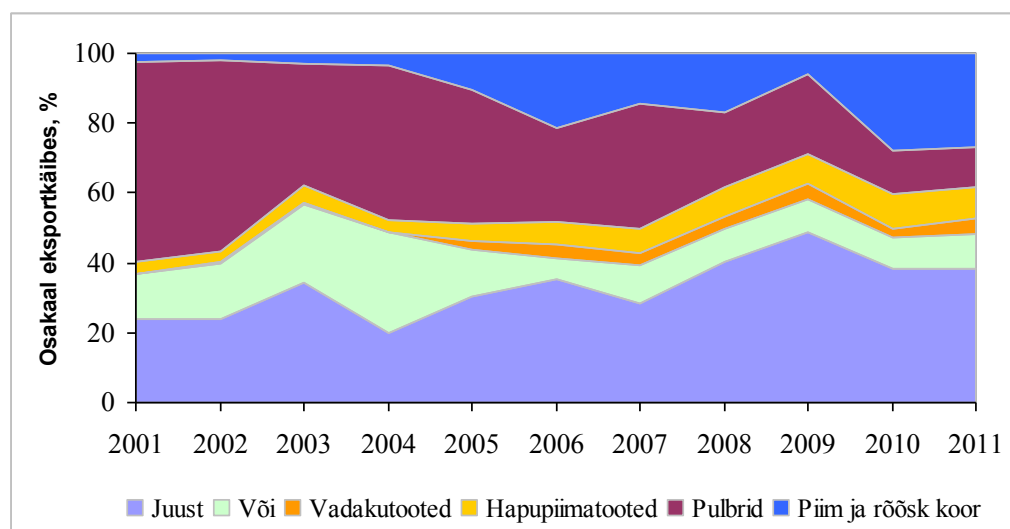


Figure 11. Share of product groups in the export turnover of milk products, %.

Source: SA.

The export markets of Estonian milk products have considerably changed during 2001–2010 (figure 13). If before the accession to the EU milk products were mainly exported to the Netherlands and Germany, then after the accession the importance of closer markets (Latvia, Lithuania and Finland) has increased. In the last years, the importance of Russia

as an export market for Estonian milk products has also grown considerably. At the same time, the number of target countries has decreased. Russia is the most important target country for the export of Lithuanian and Finnish milk products too but in Lithuania and Finland the number of export target countries is bigger. At the same time, Lithuanian and Finnish export of milk products has been specialised in certain product groups.

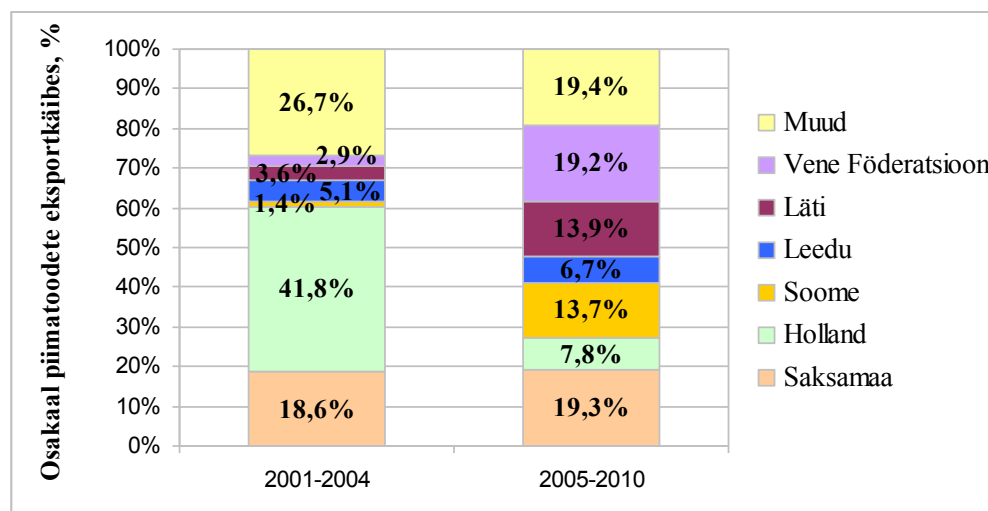


Figure 12. Share of main export markets of Estonian milk products in export turnover before and after the accession to the EU, %.

Source: SA.

Consumption

In Estonia, the consumption of milk products per capita mainly depends on the general economic situation and consumers' income. During the years of rapid economic growth, consumption increased but decreased during the years of economic recession. Decrease in population size (due to migration) can be one reason for decrease in domestic consumption. Since 2004, the long-term upward trend to prefer domestic products has turned downward. At the same time, preference given to domestic cheese and yoghurts is staying high. It can be presumed that considerable increase in domestic consumption of milk products cannot be expected in Estonia and increase in the production volume of milk products should be directed at export markets, of which the condition depends on the processes going on in global economy. In case of continual positive economic growth in rapidly developing countries, increase in demand for milk products can be expected there.

Supports

As in Estonian agriculture and food industry the dairy sector has always been of considerable importance, many different support measures have been directed at the sector. In Estonia, supports for the dairy sector have mainly been directed at primary producers of milk (figure 13). During 2001–2010, the dairy sector received about 591,3 million euros of support out of which supports for primary producers made up 91,6% and supports for milk processors 8,4%. The share of the processing sector was bigger in 2009–2010, when a wide range of market organisation measures were applied to overcome low levels of milk market.

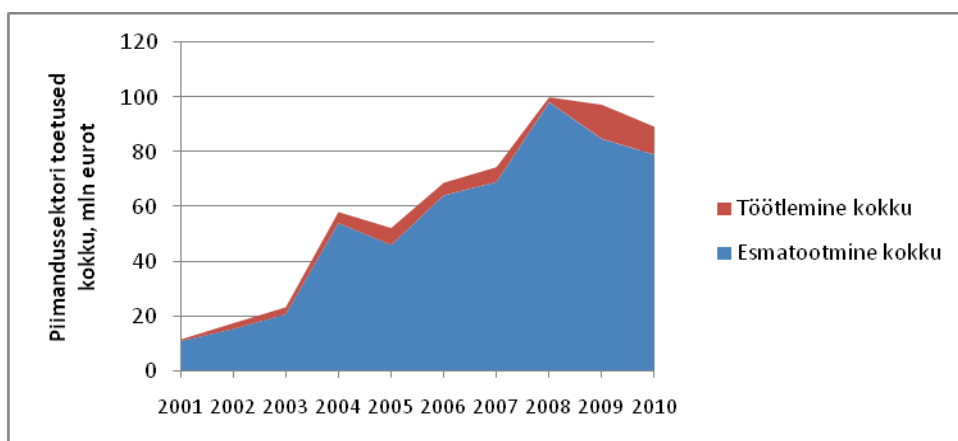


Figure 13. Supports for the primary producers and processors of milk in Estonia in 2001–2010, million euros.

Sources: drawn up on the basis of the ARIB (2005, 2006, 2007, 2008a, 2008c, 2009a, 2009b, 2010, 2011c), Ministry of Agriculture (2009), Rural Economy Research Department of the Institute of Economics and Social Sciences of the Estonian University of Life Sciences (2011), Jäneda Study and Advisory Centre (2001) data.

Figure 14 indicates that the share of support payments related to the primary producers of milk was the biggest in 2004–2006 and since 2007 has stayed at the level of approximately 20 million euros a year. But the source of coupled support payments has changed – if up to the year 2007 direct payments made up an important part of supports, since 2007 environmental support is the most important coupled support payment. Over the years, the importance of investment and development supports for primary processors has increased to some extent. It made up 23,8% of total supports for primary producers in 2001–2010. The importance of decoupled supports and emergency measures in total supports for primary producers has considerably increased.

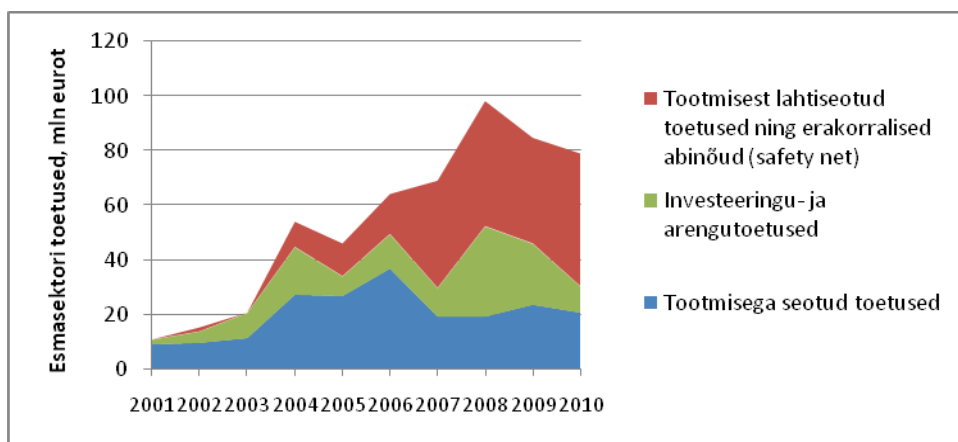


Figure 14. Supports for primary milk producers in Estonia in 2001–2010, million euros.

Sources: drawn up on the basis of the ARIB (2005, 2006, 2007, 2008a, 2008c, 2009a, 2009b, 2010, 2011c), Ministry of Agriculture (2009), Rural Economy Research Department of the Institute of Economics and Social Sciences of the Estonian University of Life Sciences (2011), Jäneda Study and Advisory Centre (2001) data.

Supports for market organisation and consumption make up the biggest part of supports for milk processors (figure 15). Consumption support concerns school milk support which made up 1,5% of total support for the sector and 18,1% of the supports for processing industry in 2001–2010. In 2001–2010, the total sum of investment supports for dairy industry was estimated at 10 million euros which made up 1,7% of the total support for the dairy sector and 20,1% of total supports for dairy industry.

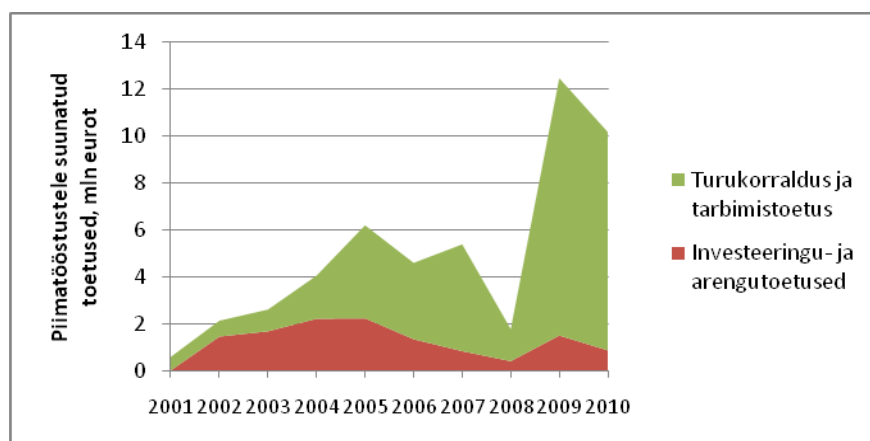


Figure 15. Supports for milk processors in Estonia in 2001–2010, million euros.

Sources: drawn up on the basis of the ARIB (2005, 2006, 2007, 2008a, 2008c, 2009a, 2009b, 2010, 2011c), Ministry of Agriculture (2009), Rural Economy Research Department of the Institute of Economics and Social Sciences of the Estonian University of Life Sciences (2011), Jäeneda Study and Advisory Centre (2001) data.

By now, a big part of the supports paid to the dairy sector have been decoupled. During 2008–2010, decoupled support payments made up 22,1%, investment supports and the supports related to research and development 23,8% and consumption supports 1,3% of total supports for the dairy sector. Thus, the supports directly influencing the development of the sector made up 47,2% of all supports for the sector and 52,8% of supports were not related to the concrete objectives of the sector development.

The applied supports have influenced the dairy sector in several ways. They have contributed to the high quality of milk produced in Estonia as well as to the maintenance of the regional distribution of milk production. Nevertheless, the supports have not been sufficient to support the continuation of the activity of many small milk producers. At the same time, supports have enabled to make the structure of milk production more effective and competitive. Milk producers have been able to bring themselves into conformity with all hygiene and quality requirements and to increase the competitiveness of processing. But the impact of supports on change in the structure of processing has been moderate, a certain concentration of enterprises has occurred in the circle of owners.

Problems

1. Milk production, efficiency, animal numbers

Big loan burden. Coming from the long-time situation of low capitalisation, milk producers have eagerly been renovating their production (incl. investing into the best available techniques) with the help of the EU different support funds, bank loans and leasings. Within 2005–2011, dairy cow sheds were built or fully reconstructed in 182 production units with 53 000 animal places (53% of the total number of cows). At the same time, producers have taken a big risk by that – in unfavourable market conditions it is difficult to pay back loans. There are no agricultural nor cooperative banks in Estonia and banks do not consider the special characteristics of agricultural holdings.

Unequal competition between the Member States. The CAP is not applied similarly in all Member States. Several states have the right for derogations or for the implementation of a transition period. Estonia has close neighbours, who are able to support their dairy

sector much more than Estonia¹. The fixed base yields and the historical reference levels not related to the activities and costs of the year of applying are a big source of unequal competition. Quality policies are also different in different Member States. Many new Member States have not been able to exhaust the value added proceeding from the Community quality marks or to fully adapt to the quality policy rules. This is why several new Member States have only a few products with a quality mark. The VAT rates applied on food products are different in different Member States². Input prices are also unequal, compared to other Member States³. Many old Member States have contributed a lot to the development of both the dairy plants and the market and have got a better starting position in the situation where some former sustainable measures have expired by now.

Lower value added than the EU average. In 2008, in an EU-27 dairy production holding the average (net) value added per labour unit was 20 727 euros and 12 560 euros (~60% of the EU average) in Estonia.

Agricultural producers' high age, lack of qualified labour. Due to the relatively low wage level and other factors young people are not interested in hard farm work. Therefore, the sustainability of small production is in danger and due to the shortage of qualified labour large-scale producers are more and more forced to search for expensive technological solutions (milking robots, etc.), which in its turn will increase production costs and loan burden.

Threats to herd reproduction. In ten years, the average age of cows at their removal from the herd has decreased by 1,3 years. This means that the average number of lactations and progeny per dairy cow has also decreased. Therefore, the share of herd reproduction related costs in milk production costs has increased and this in its turn may increase the cost price of milk and reduce the competitiveness of Estonian milk producers. In 2001–2010, the importance of extremities diseases, traumas and metabolism diseases as the reason for animals' removal increased. This can be caused by the transition to the free-range system, the intensification of milk production and the related feeding problems. On the other hand, export of young animals is also threatening extended reproduction.

Threats to milk producers caused by climate change. The difficulties of predicting climate change make agricultural production poorly controlled and predicted and therefore, climate affected changes in production volume may grow over years. At the same time, due to restricted and costly insurance conditions agricultural producers are not interested in the insurance of their production activity. The use of research and development is too small to manage climate risks. By feed, the risks posed by climate change may threaten human health.

2. Efficiency of processing, export

¹ According to the FADN data, in 2008, the highest supports for milk producers (except investments) per one livestock unit were paid in Finland (1 379 EUR/LU) and the lowest in the United Kingdom (177 EUR/LU). At the same time, if the EU average support sum amounted to 314 EUR/LU, Estonian milk producers received 388 EUR/LU, Latvian producers 493 EUR/LU, Lithuanian producers 419 EUR/LU, Swedish producers 552 EUR/LU and Polish producers 242 EUR/LU.

² In Estonia, VAT on food products is 20%, in England as a rule no VAT is applied to food products (except alcohol, beverages, ice cream, chips, confectionery), in 2009, Finland reduced its VAT of 17% on food products to 12%.

³ E.g. the so called blue fuel excise duty, the approved minimum 21 €/1000 l, in Estonia 110,95 €/1000 l.

Big loan burden. The loan burden of dairy plants is also big (production lines get obsolete very quickly and regular big investments must be made to stay in competition), but they can transfer their loss to agricultural producers during a limited period of time, which in its turn weakens milk producers.

Instability of export markets. The quantity of milk exceeding the demand of Estonian domestic market must be exported. In 2010, Estonian self-sufficiency level reached 162,5%. In case of sufficient foreign demand and successful sale the profit will be good, but if the world market milk prices are lower than the cost price of Estonian milk products, the plants will find it difficult to export the products. In such a situation, export is subsidised at the expense of domestic market and milk producers (particularly smaller). A lot of products of lower processing level (incl. of smaller value added), such as butter and powders, of which the prices are especially volatile on the world market, and raw milk are exported. At the same time, the prices of powders and butter are volatile and their production volume is also fluctuating. In 2011, the prices of butter were higher than the prices of cheese, thus, butter value was high in 2011. Therefore, regardless of the fact that often those products are exported as bulk goods, it is reasonable to maintain also the butter and powders production capacities and to improve productivity. Compared to big countries, Estonian dairy sector is very small and the market share of Estonian milk products is also small on export markets. At the same time, lower scale enables to be more flexible in reactions to market signals. Product development to develop export products of higher value added and more stable prices has not been sufficient for increase in export profitability and stability. For representation, customs proceedings and the supply of necessary documents, exporting dairy plants will need more help from Estonian embassies in foreign countries. Foreign trade policy towards the export markets outside the EU has not been supporting enough so far.

Lower value added than the EU average. In 2007, the average (gross) value added per annual work unit of the EU-27 dairy plants was 51 000 euros, in Estonia 22 900 euros (~45% of the EU average)⁴. As of April 2011, there were 31 milk handling undertakings in Estonia, of which two were development centres and one was only engaged in the purchase of raw milk. The number of processing units approved by the Veterinary and Food Board was bigger – 39 (many undertakings have several separate plants or other handling locations). The present processing capacity would enable the processing of about 800 thousand tons of milk a year instead of 600 thousand tons. It is possible to quickly and considerably increase powder production, but it is expensive to foster production capacities for the production of high value added products. As for the milk collection regions of dairy plants, there are some overlappings, which cause inefficiency and excessive transport costs. Due to low specialisation and insufficient cooperation, competition between dairy plants is stiff, product range relatively similar, broad and costly. Due to the wide range of products, the loss of raw material is big when one product is changed for another and equipment is washed meanwhile. Write-off of unused packages due to the short shelf life of products causes additional costs. It is very expensive to use large-scale production equipment for product development, therefore it is very important to improve cooperation with research and educational institutions who have the necessary basis for the creation and testing of small models. Product development provides prerequisites for the fresh milk products preferences of our consumers. The growth of private label products of retail chains to the higher level than

⁴ Indicators include the difference of support levels.

20–25% of undertaking's product portfolio endangers the survival of local production and processing.

Shortage of qualified labour. Dairy plants are also confronted with the difficulty to find qualified labour. There are shortages in the dairy sector in-service training and retraining system for adults, which is necessary to keep workers well informed about new technologies and requirements. No certificate of professional competence in dairy has been issued. If the Central Union of Estonian Farmers has the right to issue certificates of professional competence to agricultural producers, there is no organisation entitled to issue milk processors' certificates of professional competence (Association of Estonian Food Industry and Olustvere Service and Rural Economy School have taken an interest in the problem). The procedure of professional examination has not been worked out. So far, in-service training participation rates have been low.

3. Value added, research and development

The capability of producers and plants to move the production towards a more knowledge-based and environmentally friendly process is low. Investments into research and development are risky and of long payback period. The research related to milk production and processing does not always meet the expectations of producers and plants and often producers and processors cannot formulate the production problems in the solution of which scientific achievements would be of help. Links with the advisory system and research and development and with its possibilities are often weak or missing. Producers and processors are not ready to co-finance research.

4. Small production and processing, the environment

For small producers and for the farms in hardly accessible locations it is difficult to maintain and increase production. As of the end of 2010, there were 3 794 keepers of cows of dairy breed in the ARIB Register of Farm Animals and small cow keepers with 1–49 cows made up 92% of them. Many of them market their milk locally, about a fifth are milk quota owners. Small producers are very often in a closed circle – due to low capacity to invest, it is not so easy to apply for investment support, to enlarge production and to conform to the necessary requirements, low and unstable milk quantity restricts investments. The milk producers not involved in the activity of cooperatives are often paid lower price for their milk, which reduces their competitiveness and worsens their terms of payment. For raw milk, dairy plants pay a different price depending on the quantity of milk produced by the producer (cow keeper) and on the location. So far, the price of milk paid to small producers has often been lower. Even short crises have bigger impact on small and weaker producers who may even stop production due to their exclusion from the milk collection round in hard times. In the islands of Western Estonia, milk producers must pay more for raw milk transportation due to their specific location. Due to the relatively low production volumes and regional dispersion of production, big dairy plants are not interested in the processing of organic milk and a big part of organic milk is processed with regular milk.

5. Joint activity, vertical cooperation, market access

Low willingness to cooperate in the chain (both between producers and between producers and processors). The importance of cooperative production and processing is low, joint activity of any kind is often chaotic. The share of cooperative dairy plants in the purchase of raw milk is only a bit more than 20%. In case of difficulties, the positive characteristics of cooperative activity are not used for the benefit of the members of the cooperative. Due to disunion, producers do not have much possibility to have their say in

milk price formation. In Estonia, the purchase price of milk has mainly stayed among the EU lowest prices, but input (equipment, fuel, fertilizers, etc.) prices are on the Western European level. In case of price fluctuations, producers are most vulnerable as real profit from increase in consumer prices reaches the producer (the last link of the chain) in a long period of time, but in case of price fall impact on the price paid to producers is immediate. The opaqueness of price formation and want of cooperation are reasons for the confrontation of producers and processors and distrust in business partners.

Increase in the influence of chained retail trade. Chained retail trade expects from suppliers big and regular lots of goods and very low prices. This reduces small producers' opportunities to enter the market and the profit margin of all dairy plants. International retail chains are searching for cheaper suppliers from several neighbouring countries, reducing high transportation costs and differences in consumer preferences, which have functioned as domestic market protection measures up to now. Trade chains (producer-processor-trade) belonging to producers' cooperatives are missing. Trading area per capita is very big in Estonia, increasing retail trade costs. The small undertakings scattered so far have initiated short supply chains and direct marketing, in order to raise their marketing power in competition with retail chains.

6. Consumption of milk products

Decrease in the consumption of milk products and in preference to local products⁵. Due to the fall in the purchasing power of population and increase in the price of milk products, the consumption of milk products on the domestic market fell to 299 kg in 2010. Purchase decision making does not so much depend on the country of origin any more.

7. Assurance of the sector, stability

Producers and processors lack assurance over the state's vision of the future of the sector. A better formulated vision of the future and a clear message about the development of the dairy sector would provide undertakings with bigger assurance for making business decisions.

Producers' and processors' big loan burden. Banks do not consider the specialties of agricultural holdings. The loan burden of dairy plants is also big, but they can transfer their loss to agricultural producers during a limited period of time, which in its turn weakens milk producers.

Volatility of the world market prices. If the world market milk prices are lower than the cost price of Estonian milk products, the plants will find it difficult to export their products. In such a situation, export is subsidised at the expense of domestic market and milk producers (particularly smaller). A lot of products of lower processing level (incl. of smaller value added), such as butter and powders, of which the prices are especially volatile on the world market, and raw milk are exported. At the same time, the prices of powders and butter are volatile and their production volume is fluctuating.

⁵ According to the survey of the Estonian Institute of Economic Research "Population's nutritional habits and food buying preferences in 2010" preference to domestic food makes up 66%, i.e. 4 percentage points less than in 2009 and 8 percentage points less than in 2007.

Strategic objectives

1. **Increase in milk production, improvement of the efficiency of production and growth in the number of dairy cows.** The objective is to ensure the chain based sustainability of the dairy sector, to maintain the annual milk production in the short run and to increase it by a third in the long run, increasing the number of dairy cows and improving milk production. Sustainability, efficiency and increase will be achieved by the reconstruction of livestock buildings, increase in cowshed occupancy rate and energy efficiency, use of scientific cooperation for the improvement of animal genetic material and feeding and for the extension of the period to keep animals in the herd in an environmentally friendly way, preserving natural resources and in view of structural balance.
2. **Increase in milk processing efficiency and export orientation.** To improve the efficiency of milk processing, supporting to much bigger extent than so far the concentration of bigger dairy plants and the technological and technical modernisation of processing units, the introduction of innovative solutions and energy efficiency and considerably improving the export orientation of processing industry and the balance of export markets and exported products.
3. **Creation of higher value added.** To increase the share of higher value added products, incl. functional products both in production and export, introducing the possibilities offered by research and development and relying upon the relevant technological platform (for instance using in product development the possibilities offered under the European technological platform “Food for Life”).
4. **Maintenance of small production and processing, traditional agricultural landscapes and clean environment.** To contribute to the maintenance of rural settlement, to maintain and support small production and processing as a guarantee of the availability of food supplies (food security). To support the development of short supply chains and direct marketing and to help the niche and innovative specific products⁶, incl. organic products, reach the consumer, providing the consumer with a sufficient number of product options and increasing small producers’ and processors’ competitiveness. To contribute to the maintenance of traditional agricultural landscapes and clean environment through the maintenance of traditional farming.
5. **Development of joint activity and vertical cooperation.** To support the development of favourable conditions for the promotion of joint activity and vertical cooperation, to draw more attention to the development of different ways of cooperative milk processing, also in the form of cooperation between capital companies and cooperatives. Besides, the negotiation power of different links of the chain must be balanced, in order to improve market access.
6. **Increase in the consumption of milk products.** To increase the consumption of milk products, supporting and promoting the information given to consumers about local high quality products of higher value added.

⁶ Incl. goat, sheep and horse milk and milk products.

7. **Assurance and stability of the sector.** To emphasize the importance of dairy and to support the interests of the sector. To prepare anti-crisis measures in order to ensure the stability of the sector even in crisis situations (incl. for the alleviation of loan burden).

5. Measures and activities

Proceeding from the strategic objectives set for the solution of the problems detected in the development of the strategy and in view of the vision of the dairy sector, the following indicates the existing and planned measures and activities of which the introduction and use will enable the achievement of the above mentioned objectives. Finding out and indicating the measures supporting the dairy sector will enable to use the strategy as a source for the development of different programming documents, incl. the RDP support schemes.

Eesmärk 1. Piimatootmise suurendamine, tootmise tõhususe ja piimalehmade arvukuse tõstmine

Olemasolev meede	Osapoolte roll		Kavandatud tegevus	Osapoolte roll	
	Riik	Sektor		Riik	Sektor
MAK meetmed 1.4.1 ja 1.4.2 (mikropõllumajandusettevõtjate toetus ja loomakasvatusehitiste toetus)	<ul style="list-style-type: none"> • Meetmete rakendamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Põllumajandustootmise arendamine; • finantseerimine 	Põllumajandustootmise arenguks investeeringute toetamine	<ul style="list-style-type: none"> • Meetmete kujundamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Põllumajandustootmise arendamine; • finantseerimine
MAK meetmed 1.4.1; 1.6.2; 1.6.3 ja 1.9 (mikropõllumajandusettevõtjate toetus; põllumajandustoodetele lisandväärtuse andmise toetus; tootjarühmade loomise ja arendamise toetus)	<ul style="list-style-type: none"> • Meetmete rakendamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Ühistuline tegevus; • finantseerimine 	Ettevõtjatevahelise koostöö (ühistegevuse) parandamisele kaasaaitamine	<ul style="list-style-type: none"> • Ühistegevuse toetamine • mahetootmise ja –töötlemise toetamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Ühistuline tegevus; • finantseerimine
MAK meetmed 1.1, 1.3 (koolitus- ja nõuandetoetus) ja 1.2 (noortaluniku toetus)	<ul style="list-style-type: none"> • Meetmete rakendamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Noortalunike tegevuse alustamine; • koolitus- ja nõuandeteabe levitamise korraldamine (esindusorganisatsioonid) ja kasutamine (ettevõtjad); • finantseerimine 	Noorte põllumajandustootjate tegevuse alustamine ning koolitus- ja nõuandetegevuse toetamine	<ul style="list-style-type: none"> • Meetmete väljatöötamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Noortalunike tegevuse alustamine; • koolitus- ja nõuandeteabe levitamise korraldamine (esindusorganisatsioonid) ja kasutamine (ettevõtjad); • finantseerimine
Praktikatoetus	<ul style="list-style-type: none"> • Meetme rakendamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Praktika korraldamine ja juhendamine; • finantseerimine 	Põllu- ja maamajanduserialade õppurite praktikavõimaluste toetamine	<ul style="list-style-type: none"> • Tingimuste väljatöötamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Praktika korraldamine ja juhendamine; • finantseerimine
Põllumajandusloomade aretustoetus	<ul style="list-style-type: none"> • Meetme rakendamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Aretustegevus; • finantseerimine 	Põllumajandusloomade aretuse edendamine	<ul style="list-style-type: none"> • Uute riigiabi reeglite aruteludel Eesti seisukoha kaitsemise aretustoetuse jätkamiseks; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Aretustegevus; • finantseerimine
Põllumajanduslike rakendusuringute programm	<ul style="list-style-type: none"> • Programmi väljatöötamine ja rakendamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Tulemuste kasutamine; • finantseerimine 	Eesti oludesse sobiva karja funktsionaalsete tunnuste parandamise ja kasutusea pikendamise seotud	<ul style="list-style-type: none"> • Vastavate programmide väljatöötamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Tulemuste kasutamine • finantseerimine

			programmid		
MAK meede 1.8 (maaparandustoetus)	<ul style="list-style-type: none"> • Meetme rakendamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Maaparandustegevus; • finantseerimine 	Maaparanduse infrastruktuuri toetamine	<ul style="list-style-type: none"> • Meetmete väljatöötamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Maaparandustegevus; • finantseerimine
Loomsete jäätmete käitlemise kulude hüvitamine	<ul style="list-style-type: none"> • Rakendamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Loomsete jäätmete nõuetekohane käitlemine; • finantseerimine 	Loomsete jäätmete käitlemise kulude hüvitamine	<ul style="list-style-type: none"> • Rakendamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Loomsete jäätmete nõuetekohane käitlemine; • finantseerimine
Programm „Maal on mõnus“ Piimandusmuuseumi tegevused – piimapäev, rändnäitused	<ul style="list-style-type: none"> • Rakendatud Olustvere TMK baasil 	<ul style="list-style-type: none"> • Tootmise ja töötlemise tutvustamine 	Põllumajanduse ja toidutööstuse erialade populariseerimine ja kutsekindluse tõstmine	<ul style="list-style-type: none"> • Koostöö kõrg- ja kutseõppeasutustega 	<ul style="list-style-type: none"> • Tootmise ja töötlemise tutvustamine sektori ettevõtetes
Põllumajanduskultuuride saagi kindlustus	<ul style="list-style-type: none"> • kindlustusskeemi rakendamine 	<ul style="list-style-type: none"> • Kindlustuse kasutamine 	Riskikindlustuse süsteemi kujundamine	<ul style="list-style-type: none"> • Õigusliku raamistiku loomine 	<ul style="list-style-type: none"> • Kindlustuse kasutamine
			Tegevuskava koostamine kliimamuutustega kohanemiseks põllumajanduses	<ul style="list-style-type: none"> • Tegevuskava koostamise koordineerimine 	<ul style="list-style-type: none"> • Osalemine

Eesmärk 2. Piimatöötlemise tõhususe ja ekspordile orienteerituse tõstmine

Olemasolev meede	Osapoolte roll		Kavandatav tegevus	Osapoolte roll	
	Riik	Sektor		Riik	Sektor
MES meetmed – tagatised ja laenud VKE-le	<ul style="list-style-type: none"> • Meetmete rakendamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Ettevõtlustegevus; • finantseerimine 	VKE-de tegevuse toetamine	<ul style="list-style-type: none"> • Riigiabireeglite parim võimalik rakendamine 	<ul style="list-style-type: none"> • Ettevõtlustegevus; • finantseerimine
Ekspordigarantii abiskeemid	<ul style="list-style-type: none"> • Kredex-i meetme rakendamine 	<ul style="list-style-type: none"> • Ekspordi arendamine; • finantseerimine 	Ettevõtjate eksporditegevuse toetamine	<ul style="list-style-type: none"> • Ministeeriumide vaheline koostöö põllumajanduse ja toidusektori huvide kaitsel 	<ul style="list-style-type: none"> • Ekspordi arendamine; • finantseerimine
Turuarendustoetus	<ul style="list-style-type: none"> • Meetme rakendamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Müügi- ja teavitustegevus; • finantseerimine 	Müügiarenduse ja teavitustegevuse toetamine	<ul style="list-style-type: none"> • Toetuse tingimuste väljatöötamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Müügi- ja teavitustegevus; • finantseerimine
Euroopa Komisjoni promotsioonimeetmed (EL-is ja 3. maade turgudel)	<ul style="list-style-type: none"> • Meetmete rakendamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Meetmete kasutamine toodete tutvustamiseks (seni vähe kasutatud); • finantseerimine 	Müügiarenduse ja teavitustegevuse toetamine	<ul style="list-style-type: none"> • Skeemide lihtsustamine koostöös EK-ga; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Meetmete kasutamine toodete tutvustamiseks; • finantseerimine
MAK meede 1.7.1 (koostöö teadus- ja arendusastutustega)	<ul style="list-style-type: none"> • Meetme rakendamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Tootearenduse alase koostöö tegemine, • kaasfinantseerimine 	Teadus- ja arendusastutustega koostöö toetamine	<ul style="list-style-type: none"> • Taotlemise tingimuste väljatöötamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Tootearenduse alane koostöö tegemine; • finantseerimine
EAS-i ekspordimeetmed (konsultandid, infopäevad jms)	<ul style="list-style-type: none"> • Meetme rakendamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Kasutamine; • finantseerimine 	Eksporditegevuse toetamine	<ul style="list-style-type: none"> • PMi infovahetus MKM ja EASiga meetmetest 	<ul style="list-style-type: none"> • Kasutamine; • finantseerimine
Eesti Vabariigi välisesinduste kaasamine sektori huvide kaitsel	<ul style="list-style-type: none"> • Koostöö VM ja esindustega (sh FAO, WTO, OECD); • sektori regulaarne informeerimine (kasutatud tagasihoidlikult) 	<ul style="list-style-type: none"> • Teabe edastamine soovide/ootuste kohta (kasutatud tagasihoidlikult) 	Eesti Vabariigi välisesinduste kaasamine sektori huvide kaitsel	<ul style="list-style-type: none"> • Koostöö VM ja esindustega (sh FAO, WTO, OECD); • sektori regulaarne informeerimine 	<ul style="list-style-type: none"> • Teabe edastamine soovide/ootuste kohta
EL-i poolt sõlmitavad kaubanduslepingud	<ul style="list-style-type: none"> • Sõlmitud lepingud 	<ul style="list-style-type: none"> • Oma huvide ja seisukohtade edastamine 	EL-i poolt sõlmitavad kaubanduslepingud	<ul style="list-style-type: none"> • Sektori informeerimine ja huvide kaitse 	<ul style="list-style-type: none"> • Oma huvide ja seisukohtade edastamine
Praktikatoetus	<ul style="list-style-type: none"> • Meetme rakendamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Praktika korraldamine ja juhendamine; 	Põllu- ja maamajanduserialade õppurite	<ul style="list-style-type: none"> • Tingimuste väljatöötamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Praktika korraldamine ja juhendamine; • finantseerimine

		<ul style="list-style-type: none"> • finantseerimine 	praktikavõimaluste toetamine		
Programm „Maal on mõnus“	<ul style="list-style-type: none"> • Rakendatud Olustvere TMK baasil 	<ul style="list-style-type: none"> • Tootmise ja töötlemise tutvustamine sektori ettevõtetes 	Põllumajanduse ja toidutööstuse erialade populariseerimine ja kutsekindluse tõstmine	<ul style="list-style-type: none"> • Koostöö kõrg- ja kutseõppeasutustega 	<ul style="list-style-type: none"> • Tootmise ja töötlemise tutvustamine sektori ettevõtetes
MAK meetmed 1.6.2; 1.6.3 ja 1.9 (põllumajandustoodetele lisandväärtuse andmise toetus; tootjarühmade loomise ja arendamise toetus)	<ul style="list-style-type: none"> • Meetmete kujundamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Ühistuline tegevuse arendamine; • finantseerimine 	Tootjate ühistutesse koondumise ja ühistuliste tööstuste investeringute toetamine	<ul style="list-style-type: none"> • Meetmete kujundamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Ühistulise tegevuse arendamine; • finantseerimine
			Garantiifond turgude ebastabiilsuse leevendamiseks	<ul style="list-style-type: none"> • Osalemise võimaluse analüüsimine 	<ul style="list-style-type: none"> • Kokkulepe fondi loomiseks ja sissemaksete tegemiseks

Eesmärk 3. Kõrgema lisandväärtuse loomine

Olemasolev meede	Osapoolte roll		Kavandatav tegevus	Osapoolte roll	
	Riik	Sektor		Riik	Sektor
MAK meede 1.6 (põllumajandustoodetele lisandväärtuse andmise toetus)	<ul style="list-style-type: none"> • Meetme rakendamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Keskkonnainvesteeringute tegemine; • finantseerimine 	Keskkonnainvesteeringute soodustamine	<ul style="list-style-type: none"> • Meetmete väljatöötamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Parima võimaliku kasutuselevõtmine; • tootmisega kaasneva keskkonnamuutuse vähendamine; • finantseerimine
Põllumajanduslike rakendusuuringute programm	<ul style="list-style-type: none"> • Programmi elluviimine 	<ul style="list-style-type: none"> • Osalemine 			
Turuarendustoetus	<ul style="list-style-type: none"> • Meetme rakendamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Müügi- ja teavitustegevus; • finantseerimine 	Müügiarenduse ja teavitustegevuse toetamine	<ul style="list-style-type: none"> • Meetme kujundamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Müügi- ja teavitustegevus; • finantseerimine
MAK meetmed 2.1; 2.2; 2.3; 2.4 (ebasoodsate piirkondade toetus Natura 2000 toetus põllumajandusmaale; põllumajanduslik keskkonnatoetus; loomade karjatamise toetus)	<ul style="list-style-type: none"> • Meetmete rakendamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Põllumajandustootmise keskkonnasõbralikumaks muutmine; • finantseerimine 	Põllumajandustootmise keskkonnasõbralikumaks muutmise toetamine	<ul style="list-style-type: none"> • Meetmete väljatöötamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Põllumajandustootmise keskkonnasõbralikumaks muutmine; • finantseerimine
EAS teadus-arenduskeskuste programm	<ul style="list-style-type: none"> • Programmi väljatöötamine, • kaasfinantseerimine 	<ul style="list-style-type: none"> • T&A projektide teostamine; • finantseerimine 	Teadus-arenduskeskuste projektide toetamine	<ul style="list-style-type: none"> • Tingimuste väljatöötamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • T&A projektide teostamine; • finantseerimine
Valdkonna teadusuuringute tulemuste tutvustamine tarbijatele	<ul style="list-style-type: none"> • Konsulentide infopäevade korraldamine 	<ul style="list-style-type: none"> • Tulemuste kasutamine 	Valdkonna teadusuuringute tulemuste tutvustamine sektorile (sh konsulentide teabepäevad)	<ul style="list-style-type: none"> • Infopäevade korraldamine; • infomaterjalide koostamine ja levitamine 	<ul style="list-style-type: none"> • Tulemuste kasutamine
MAK meede 1.7.1 (koostöö teadus- ja arendusastutustega)	<ul style="list-style-type: none"> • Meetme rakendamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Tootearendusprojektid; • finantseerimine 	Teadus- ja arendusastutustega koostöö toetamine	<ul style="list-style-type: none"> • Meetmete väljatöötamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Tootearendusprojektid; • finantseerimine
MAK meede 1.3 (nõuandetoetus)	<ul style="list-style-type: none"> • Toetuse tingimuste väljatöötamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Saadus teabe rakendamine; • finantseerimine 	Nõuandetegevuse toetamine	<ul style="list-style-type: none"> • Toetuse tingimuste ja toetusmäära väljatöötamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Saadus teabe rakendamine; • finantseerimine

Eesmärk 4. Väiketootmise ja –töötlemise säilitamine, traditsiooniliste põllumajandusmaastike ja puhta keskkonna püsimine

Olemasolev meede	Osapoolte roll		Kavandatav tegevus	Osapoolte roll	
	Riik	Sektor		Riik	Sektor
Piimasektori eritoetus alla 100 piimalehmaga tootjatele ning saartel perioodil 2010-2013	<ul style="list-style-type: none"> • Meetmete rakendamine 	<ul style="list-style-type: none"> • Kasutamine 			
MAK meetmed 1.1 ja 1.3 (koolitus- ja nõuandetoetus)	<ul style="list-style-type: none"> • Meetmete rakendamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Koolitus- ja nõuandeteabe levitamise korraldamine (esindusorganisatsioonid) ja kasutamine (ettevõtjad); • finantseerimine 	Koolitus- ja nõuandetegevuse toetamine	<ul style="list-style-type: none"> • Meetmete kujundamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Koolitus- ja nõuandeteabe levitamise korraldamine (esindusorganisatsioonid) ja kasutamine (ettevõtjad); • finantseerimine
MAK meede 3.1 (majandustegevuse mitmekesistamise toetus)	<ul style="list-style-type: none"> • Meetmete rakendamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Maapiirkonnas ettevõtluse mitmekesistamine; • finantseerimine 	Maapiirkonnas ettevõtluse mitmekesistamise toetamine	<ul style="list-style-type: none"> • Meetmete kujundamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Maapiirkonnas ettevõtluse mitmekesistamine; • finantseerimine
MAK meetmed 1.4.1; 1.4.2; 1.6.2; 1.6.3 ja 1.9 (mikropõllumajandusettevõtjate toetus; loomakasvatusehitiste toetus, põllumajandustoodetele lisandväärtuse andmise toetus; tootjarühmade loomise ja arendamise toetus)	<ul style="list-style-type: none"> • Meetmete rakendamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Ühistuline tegevus; • finantseerimine 	Ettevõtjatevahelise koostöö (ühistegevuse) parandamisele kaasaaitamine, põllumajandustootmise arenguks investeringute toetamine	<ul style="list-style-type: none"> • Ühistegevuse toetamine • mahetootmise ja –töötlemise toetamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Ühistuline tegevus; • finantseerimine
MAK meetmed 2.1; 2.2; 2.3; 2.4 (ebasoodsate piirkondade toetus Natura 2000 toetus põllumajandusmaale; põllumajanduslik keskkonnatoetus; loomade karjatamise toetus)	<ul style="list-style-type: none"> • Meetmete rakendamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Vähe sobivates piirkondades põllumajandusega tegelemine, mahetootmine, ohutatud tõugu loomade pidamine; • Põllumajandustootmise keskkonnasõbralikumaks muutmine; • finantseerimine 	Väiketootjate ja vähem sobivates piirkondades tootmise säilitamise ja kasvatamise võimaluste analüüsimine ning toetamine. Põllumajandustootmise keskkonnasõbralikumaks muutmise toetamine	<ul style="list-style-type: none"> • Meetmete kujundamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Vähe sobivates piirkondades põllumajandusega tegelemine, mahetootmine, ohutatud tõugu loomade pidamine; • Põllumajandustootmise keskkonnasõbralikumaks muutmine • finantseerimine
MAK LEADER meede	<ul style="list-style-type: none"> • Rakendamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Võrgustike loomine; • finantseerimine 	Väiketootjate ja töötlejate võrgustiku	<ul style="list-style-type: none"> • Meetmete kujundamine; 	<ul style="list-style-type: none"> • Suurem aktiivsus võrgustike loomisel;

			toetamine	• kaasfinantseerimine	• finantseerimine
MAK meede 1.7.3 (mahepõllumajandustoodete promotsioonitoetus)	• Meetme rakendamine; • kaasfinantseerimine	• Mahetoodete promotsioon; • finantseerimine	Mahepõllumajandustoo dete promotsiooni toetamine	• Meetmete kujundamine; • kaasfinantseerimine	• Mahetoodete promotsioon; • finantseerimine
Eesti mahepõllumajanduse arengukava aastateks 2007-2013	• Arengukava väljatöötamine	• Väljatöötamisel osalemine	Mahe arengukava täiendamine	• Mahepiimatootmise ja -töötlemise probleemide adresseerimine	• Ettepanekute tegemine

Eesmärk 5. Ühistegevuse ja vertikaalse koostöö arendamine

Olemasolev meede	Osapoolte roll		Kavandatav tegevus	Osapoolte roll	
	Riik	Sektor		Riik	Sektor
MAK meetmed 1.4.1; 1.6.2; 1.6.3 ja 1.9 (mikropõllumajandusettevõtjate toetus; põllumajandustoodetele lisandväärtuse andmise toetus; tootjarühmade loomise ja arendamise toetus)	<ul style="list-style-type: none"> Ettevõtjatevahelise koostöö (ühistegevuse) parandamisele kaasaaitamine erinevate toetuste rakendamise kaudu; kaasfinantseerimine 	<ul style="list-style-type: none"> Ühistuline tegevus; finantseerimine 	Tootjate ühistutesse koondumise ja ühistuliste tööstuste investeeringute toetamine. Ettevõtjatevahelise koostöö (ühistegevuse) parandamisele kaasaaitamine	<ul style="list-style-type: none"> Ühistegevuse toetamine; kaasfinantseerimine 	<ul style="list-style-type: none"> Ühistuline tegevus; finantseerimine
			Lühikese tarneahela arendamise toetamine	<ul style="list-style-type: none"> Meetmete väljatöötamine; kaasfinantseerimine 	<ul style="list-style-type: none"> Võrgustike loomine; finantseerimine
			Täiendavad toidumärgistamise võimalused (nt päritolumaa)	<ul style="list-style-type: none"> Täiendavate märgistunõuete rakendamine EK nõuete raames 	<ul style="list-style-type: none"> Täiendavate märgistusnõuete täitmine
			Nn piimapaketi meede tootmisharudevaheliste organisatsioonide tegevuse edendamiseks	<ul style="list-style-type: none"> Tootmisharudevaheliste organisatsioonide tegutsemiseks võimaluste loomine 	<ul style="list-style-type: none"> Tootmisharudevaheliste organisatsioonide asutamine
			Toorpiima kokkuostu hinna läbipaistvus		<ul style="list-style-type: none"> Võimalike lahenduste väljatöötamine
			Piimastrateegia tegevuste elluviimise regulaarne seire	<ul style="list-style-type: none"> Seire läbiviimine ja ülevaate esitamine 	<ul style="list-style-type: none"> Probleemidest teavitamine

Eesmärk 6. Piimatoodete tarbimise ja kodumaise eelistamise tõstmine

Olemasolev meede	Osapoolte roll		Kavandatav tegevus	Osapoolte roll	
	Riik	Sektor		Riik	Sektor
Eesti toidu tutvustamine ja propageerimine	<ul style="list-style-type: none"> Eesti toitu tutvustavate ja propageerivate tegevuste planeerimine ja rakendamine 	<ul style="list-style-type: none"> Tegevuste elluviimine 	Eesti toidu tutvustamine ja propageerimine	<ul style="list-style-type: none"> Eesti toitu tutvustavate ja propageerivate tegevuste planeerimine ja rakendamine 	<ul style="list-style-type: none"> Tegevuste elluviimine
Koolipiima programm ja sellele riikliku lisatoetuse maksmine	<ul style="list-style-type: none"> Rakendamine 	<ul style="list-style-type: none"> Osalemine 	Koolilastele piimatoodete võimaldamise toetamine	<ul style="list-style-type: none"> Võimalusel piimatoote liitri kohta antava lisatoetuse määra säilitamine 	<ul style="list-style-type: none"> Osalemine programmis; <ul style="list-style-type: none"> piima ja –toodete populariseerimine omavahendite arvelt
Tarbija teadlikkuse tõstmine	<ul style="list-style-type: none"> Toidumärgiste tutvustamine; toidu ohutuse alase ülevaate koostamine ja avalikustamine; trükiste koostamine; teabe levitamine; täiendavate märgistunõuete (nt päritolumaa) rakendamine EK nõuete raames 	<ul style="list-style-type: none"> Piimatoodete tutvustamine ja propageerimine; Kvaliteedimärkide kasutamine piimatoodete naturaalsuse säilitamine 	Tarbija teadlikkuse tõstmine	<ul style="list-style-type: none"> Toidumärgiste tutvustamine; toidu ohutuse alase ülevaate koostamine ja avalikustamine; trükiste koostamine; teabe levitamine; täiendavate märgistunõuete (nt päritolumaa) rakendamine EK nõuete raames 	<ul style="list-style-type: none"> Piimatoodete tutvustamine ja propageerimine; siseriiklikes kvaliteediskeemides osalemine; kvaliteedimärkide kasutamine; piimatoodete naturaalsuse säilitamine

Eesmärk 7. Sektori stabiilsuse tagamine

Olemasolev meede	Osapoolte roll		Kavandatud tegevus	Osapoolte roll	
	Riik	Sektor		Riik	Sektor
MES meetmed – tagatised ja laenu VKE-le	<ul style="list-style-type: none"> • Meetmete rakendamine; • kaasfinantseerimine 	<ul style="list-style-type: none"> • Ettevõtlustegevus; • finantseerimine 	VKE-de tegevuse toetamine	<ul style="list-style-type: none"> • Riigiabiireeglite parim võimalik rakendamine 	<ul style="list-style-type: none"> • Ettevõtlustegevus; • finantseerimine
Turukorraldusmeetmed (eraladustamine, sekkumiskokkuost, ekspordisubsiidiumid)	<ul style="list-style-type: none"> • Turukorraldus-meetmete rakendamine vastavalt EK otsusele 	<ul style="list-style-type: none"> • Õigeaegne turuinfo edastamine 	Turukorraldus-meetmete jätkuv rakendamine kooskõlas ÜPP-ga	<ul style="list-style-type: none"> • Sektori regulaarne informeerimine 	<ul style="list-style-type: none"> • Turukorraldus-meetmete reeglitepärane rakendamine
Täiendavad turukorralduslikud meetmed kriisilukorraks	<ul style="list-style-type: none"> • 2009.a rakendatud kriisiabi meetmed 		Kriisimeetmete väljatöötamine (sh vastumeetmed SPS ja TBT meetmetele sihtturgudel)	<ul style="list-style-type: none"> • Ettevõtjate huvide esindamine EK-s ja WTO-s; • sektori informeerimine EL-i riikide vahelistest kaubandus-lepingutest ja tingimustest 	<ul style="list-style-type: none"> • Õigeaegne informeerimine probleemidest kaubanduses
Ekspordigarantii abiskeemid	<ul style="list-style-type: none"> • Kredexi meetme rakendamine 	<ul style="list-style-type: none"> • Ekspordi arendamine; • finantseerimine 	Ettevõtjate eksporditegevuse toetamine	<ul style="list-style-type: none"> • Ministeeriumide vaheline koostöö põllumajanduse ja toidusektori huvide kaitsel 	<ul style="list-style-type: none"> • Ekspordi arendamine; • finantseerimine
Täiendav tugipakett ettevõtete rahastamiseks	<ul style="list-style-type: none"> • Rakendatud 2009. a osaliselt 				
EL-i poolt sõlmitavad kaubanduslepingud	<ul style="list-style-type: none"> • Sõlmitud lepingud 	<ul style="list-style-type: none"> • Oma huvide ja seisukohtade edastamine 	EL-i poolt sõlmitavad kaubanduslepingud	<ul style="list-style-type: none"> • Sektori informeerimine ja huvide kaits 	<ul style="list-style-type: none"> • Oma huvide ja seisukohtade edastamine
Ettevõtjate kaasamine PMAN ja MAK juhtkomitee tegevusse	<ul style="list-style-type: none"> • PMAN nõukogu töö korraldamine; • MAK juhtkomitee korraldamine 	<ul style="list-style-type: none"> • Selgete seisukohtade avaldamine; • osalemine 	Ettevõtjate kaasamine PMAN ja MAK juhtkomitee tegevusse	<ul style="list-style-type: none"> • Sektori õigeaegne ja ülevaatlik informeerimine, • sektori kaasamine otsustamisse 	<ul style="list-style-type: none"> • Selgete seisukohtade avaldamine; • osalemine
EL otsustusprotsessis osalemine	<ul style="list-style-type: none"> • Komitoloogia 	<ul style="list-style-type: none"> • Osalemine EK piima nõuandvas töögrupis 	EL otsustusprotsessis osalemine	<ul style="list-style-type: none"> • Kindla sagedusega kohtumiste korraldamine komitoloogidega 	<ul style="list-style-type: none"> • Sektori seisukohtade ja probleemide õigeaegne tõstatamine
Turuseire ja –info	<ul style="list-style-type: none"> • Kogumise ja Euroopa Komisjonile edastamise korraldamine 	<ul style="list-style-type: none"> • Osalemine andmete edastamisel 	Turuseire ja –info	<ul style="list-style-type: none"> • Andmete kogumise ja analüüsi korraldamine; • tulemuste avalikustamine 	<ul style="list-style-type: none"> • Koostöö andmete edastamisel ja levitamisel
			Riskikindlustuse süsteemi kujundamine	<ul style="list-style-type: none"> • Õigusliku raamistiku loomine 	<ul style="list-style-type: none"> • Kindlustuse kasutamine
			Garantiifond turgude	<ul style="list-style-type: none"> • Osalemise võimaluse 	<ul style="list-style-type: none"> • Kokkulepe fondi

			ebastabiilsuse leevendamiseks	analüüsimine	loomiseks ja sissemaksete tegemiseks
			Piimanduse strateegia koostamine ja jõustamine	<ul style="list-style-type: none"> • Koostamise korraldamine; • tutvustamine üldsusele 	<ul style="list-style-type: none"> • Aktiivne osalus koostamisel ja jõustamisel
			Piimanduse olulisuse esiletoomine	<ul style="list-style-type: none"> • Piimanduse strateegia võimalik kasutamine arengukavade, nt MAK 2014-2020, sisendina 	

6. Kooskõla teiste arengukavadega

Strateegia väljatöötamisel on arvestatud „Eesti maaelu arengu strateegiat (MAS) 2007–2013“⁷, „Eesti maaelu arengukava (MAK) 2007–2013“⁸, Lissaboni strateegiat, „ELi mahepõllumajanduse arengukava“⁹, „Eesti mahepõllumajanduse arengukava 2007–2013“¹⁰, Euroopa Liidu infoühiskonna strateegiat¹¹ ning konkurentsivõime ja innovatsiooni raamprogrammi infoühiskonna osa, „Eesti teadus- ja arendustegevuse ning innovatsiooni strateegiat "Teadmistepõhine Eesti 2007–2013“¹², „Eesti majanduskasvu ja tööhõive tegevuskava aastateks 2008–2011“, „Täiskasvanuhariduse arengukava aastateks 2009–2013“, „Kõrgharidusstrateegiat 2006–2015“, Vabariigi Valitsuse strateegiadokumenti „Eesti edu 2014“¹³ ning „Biomassi ja bioenergia kasutamise edendamise arengukava aastateks 2007–2013“¹⁴.

Lisa 1. Sektori tugevuste, nõrkuste, ohtude ja võimaluste analüüs (SWOT)



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Lisa 2.

1. Piimastrateegia taustauuring (EMÜ)



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2. FAO hinnang olukorrale toiduga ja piimaga varustatuse osas maailmas



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Lisa 3. Rakendatud toetusmeetmed

Meetmete kirjeldus



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⁷ http://www.agri.ee/public/Eesti_maaelu_arengu_strateegia_2007_2013.pdf

⁸ http://www.agri.ee/public/juurkataloog/MAK/MAK_2007-2013.pdf

⁹ http://europa.eu.int/comm/agriculture/qual/organic/plan/index_en.htm

¹⁰ <http://www.agri.ee/index.php/15589/>

¹¹ http://europa.eu.int/information_society/eeurope/i2010/index_en.htm

¹² <https://www.riigiteataja.ee/ert/get-attachment.jsp?id=12794495>

¹³ <http://www.riigikantselei.ee/?id=4270>

¹⁴ <http://www.agri.ee/public/juurkataloog/BIOENERGEETIKA/bioenergia.pdf>