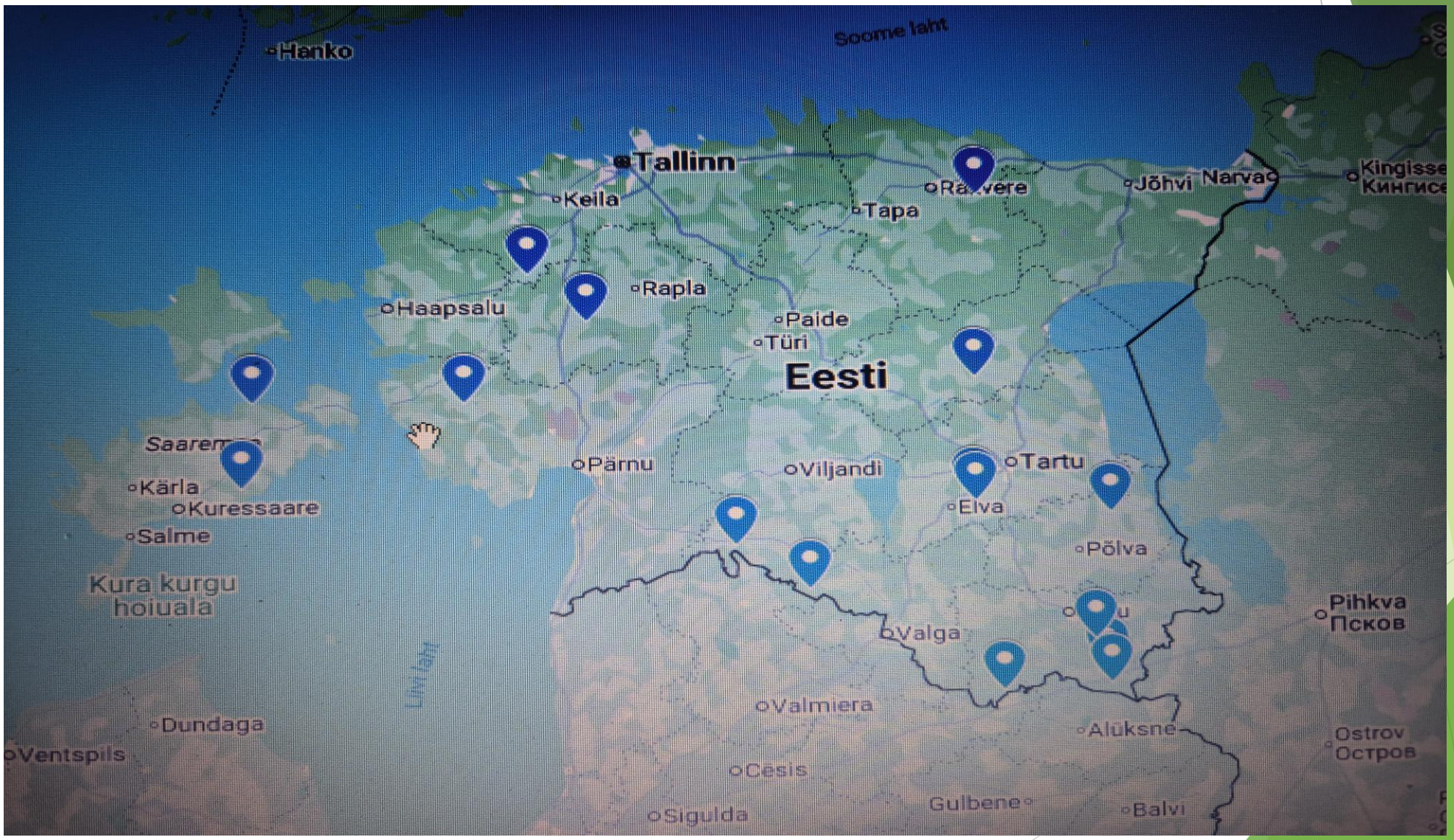
Estonian Farm Dairy Association

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Estonian Farm Dairy Association

- Active since 1999
- Brings together 16 dairy farmers and small processors across Estonia
- Processes sheep’s, goat’s and cow’s milk
- Half of the members are organic producers
- Goals: short supply chains, training, study visits, marketing and cooperation

Geographical Distribution Matters



In the Dairy Market

- In 2024, members' combined sales revenue was approximately €8 million
- Our members share of total Estonian dairy market is relatively small

Differentiation is key to survival:

- Consumers expect products to stand out
- Short supply chains are becoming increasingly important
- Diversification of products and servicies



Small processors and farm dairies: 69% of firms

22 / 32

68.8%

of dairy-processing businesses were small processors or farm dairies

Number of businesses by category (2023)

Small-scale processors	**10**
Farm dairies processing their own milk	**9**
Goat- and sheep-milk farm dairies	**3**
Large dairy processors and groups	**8**
Not separately classified*	**2**

* Residual count out of 32 businesses; the source does not specify this group.

IMPORTANT LIMITATION

69% is the share of businesses in 2023, NOT the share of cheese output. Cheese production volumes for small producers in 2024–2025 are not available in public statistics.

Source: Ministry of Regional Affairs and Agriculture, 2023 review, p. 92

About Dairy Processing

- Most processors use milk from their own dairy cows
- Some also buy in milk and operate very successfully
- Investment support has helped increase processing capacity
- Main products include hard cheeses, fresh dairy products with a short shelf life and distinctive niche products


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Training

- Developing products and businesses requires networking, international study visits and trade fairs
- Our association members have visited Sweden, Germany, France, Switzerland, the Netherlands and Austria for training
- We have used national programmes (AKIS) to support visits by international experts to Estonia and study trips abroad, e.g. through market development grants or development vouchers
- These activities have helped introduce new technologies and knowledge to our producers



The Future?

- Joint marketing is an opportunity that is not being used today
- Each producer has their own distinct identity
- Producers cooperate, but they do not produce jointly
- In some respects, we are at a crossroads
- Market instability has reduced the number of small-scale processors

Why Small-Scale Processors Matter

- Decentralised production
- Jobs in rural areas
- Integrity of the supply chain
- Diversity of flavours
- Traditional food production





Thank you!