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Estonia

Exporter Guide

Annual

2003

Approved by:

Lana Bennett, Agricultural Counselor
U.S.Embassy

Prepared by:

Jolanta Andersone, Agricultural Specialist

Report Highlights:

With consumer purchasing power on the rise and growing tourism, prospects for increased demand for high-value food imports are viewed as favorable. The inflow and fast development of large Nordic/European retail chains into Estonia along with other Baltic countries offer new opportunities for American exporters who can successfully connect with them. New market entrants will have to be aggressive to compete with the more established European suppliers as their commercial relationships have been built up and maintained over the past decade. Major current constraints to U.S. Exports include the tariff disadvantages vis-a-vis European suppliers and Estonia's partners of Free Trade Agreements, and consumer unfamiliarity with U.S. grocery products. Estonia will join the EU in 2004 and then automatically takes over EU tariffs, and model certificates requirements.

Includes PSD Changes: No
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Section I: Market overview

In 2002, the Estonian economy grew 6.0 percent. Growth of domestic expenditure remains the main driver of the economy. It is supported by low interest rates, rise in real incomes, and high investment demand. The prices of goods and services rose on average by 3.6 percent, allowing for 9.3 percent growth of private consumption. Per capita GDP of US\$ 4,697 was largest among the three Baltic neighbor countries, although several times lower than the average among countries of the European Union. In January 2003, the population of Estonia was 1.356 million people, which represents a decline by almost 8 percent over the past decade, due to lowered birth rates and migration.

The fast-developing consolidation of retail outlets through investment by large Scandinavian chains has led to the construction of ultra-modern, self-service, fully-assorted supermarkets and hypermarkets that may provide new opportunities for exporters who can successfully connect with these companies. Swedish companies accounted for the largest share (41 percent) of foreign direct investments in Estonia, followed by Finland (27 percent). U.S. companies accounted for an 8 percent share. The major investment in the Estonian food and agriculture sector is the Coca-Cola Beverages filling plant in Tallinn, supplying the Baltic States. The development of a strong food industry is an official government priority, because food enterprises must gear up to meet EU quality requirements. Investment demand will continue to increase and there may be opportunities for U.S. suppliers of inputs to these operations.

In 2002, the domestic retail grocery sales totalled US\$ 645 million, of which food products accounted for 64 percent. The remaining 36 percent consisted of alcoholic beverages and tobacco products. Imported foods added much to the variety of products on the market and accounted for nearly 35 percent by value. Consumption patterns and demand for imported food products have been affected by increased consumer purchasing power, an increase in the expatriate community, and the growth of tourism. The fast-growing tourism business brought 3.2 million visitors to Estonia, mostly Finns (58 percent), followed by Latvians (14 percent), and Russians (9 percent).

Supermarkets have experienced growth, especially in the suburbs, at the expense of small shops and open-air markets, and the concentration of retail chains is evident. Opportunities exist for new-to-market products - particularly for products marketed through the developing retail chains. Currently, the food retail trade is largely controlled by only a handful of companies. Given the relatively small consumer base in the Baltic region as a whole, the emergence of pan-Baltic food companies with centralized distribution schemes will help to achieve the economies of scale needed to make imports viable.

Estonia is a net importer of food products. In 2002, agricultural imports worth US\$ 586 million exceeded the value of exports, which amounted to US\$ 241 million (excluding wood). Wood product exports, which dominate Estonia's agricultural exports, totaled US\$ 622 million in 2002. The most significant agricultural imports included beverages, meat products, fresh and preserved fruits and vegetables, coffee, tea, cotton and animal feeds. Currently, over 80 percent of Estonia's food exports and imports (excluding wood products) occurs with the country's bilateral trade agreement partners (EU, EFTA, CEFTA, Baltic countries, as well as Ukraine, Turkey and the Faroe Islands), however none of the current FTAs will survive once Estonia joins the EU. EU market is gradually opening up for Estonian food products as it adopts EU hygiene requirements and as EU increases import quotas for Estonian products. In 2002, over 60 percent of Estonia's food imports' originated from the EU. The EU accounted for 35 percent of Estonia's food and agricultural products exports, mainly dairy products and fish preparations. Estonia's progressive alignment with EU tariffs and regulations is disadvantaging U.S. agricultural exports. In 2002, U.S. agricultural exports to

Estonia were US\$ 11.6 million. The U.S. accounted for 19 percent of Estonia's imports of poultry for its domestic market (4,288 MT). Unless the EU market re-opens for U.S. poultry products, U.S. poultry exports stand to lose the Estonian market after EU accession. Other major U.S. Exports were cotton, fish, dried fruit, nuts, wines and liquors. U.S. imports from Estonia totaled US\$ 9.6 million in 2002, and included beverages, frozen fish and fish preparations. In addition, U.S. imported US\$ 15.6 million of Estonian wood products.

Estonia may be viewed as an attractive gateway to the large regional markets, including the St. Petersburg's region in Northwest of Russia with a population of 44 million, and Belarus with a total of 10.3 million people, and the aggregate Baltic market with a combined population of almost 8 million.

Advantages and Challenges Facing U.S. Products

| ADVANTAGES | CHALLENGES |
|--|---|
| U.S. products are considered safe and have good quality. The general image of U.S. products is positive. | Long-established consumer preference for domestic fresh products with no additives. |
| The retail sector is looking for highly processed food imports. Purchasing power of the population is on the rise. | Strong competition on the local market between domestic producers and increasing imports from EU and Baltic FTA partners. High distribution and shipping costs. |
| The country is viewed as a gateway to larger markets in North-western Russia, Ukraine, and Belarus. | The tariff schedule disadvantages U.S. exports are disadvantaged vis-à-vis products from European Union and FTA countries. |
| Estonia joined the WTO in December 1999 | Estonia is a comparatively small target market for US products. |

SECTION II: Exporter business tips

Local Business Practices and Customs

Entry Strategy

As a result of the fast-developing consolidation process, perhaps the most effective strategy for U.S. exporters would be to connect with parent companies of the food retail chains in Europe (mainly in Finland, Sweden and Norway) that are expanding their outlets in the Baltics. These chains already have a degree of familiarity with U.S. products.

Market entry strategies for U.S. food products should include:

- 1) Market research in order to estimate product opportunities.
- 2) Advance calculation of the landed cost of a product in order to make price comparisons vis-a-vis competitors.
- 3) Locating an experienced distributor or independent reliable agent/dealer with strategic distribution channels to advise on import duties, sanitary and phytosanitary regulations, and labelling requirements. It is advisable to initiate personal contact in order to discuss marketing matters such as funding for advertising, slotting allowance, in-store promotions and tasting events. Suppliers may also wish to consider trade fair participation to raise awareness of the product.
- 4) Explore the purchasing arrangements of the larger retail chains.

U.S. products traditionally have lower customer awareness due to fewer promotional activities than those of domestic and European competitors. For many product categories, new market entrants will have to be aggressive to compete with the more established European suppliers, as their commercial relationships have been built up and maintained over the past decade.

Several constraints have contributed to the small market presence of U.S. food:

- Trade terms from U.S. companies tend to require advance payment of up to two months.
- An aversion to the assumption of exchange rate risks.
- Minimum quantities offered have often been too large for the small Estonian market (e.g. full container shipments).
- A perception that persists among Estonian importers is that landed costs of U.S. products will be higher compared to European products due to higher transportation costs.
- A perception that U.S. exporters are simply too far away to service the Estonian market.

Supplier choice may depend on the retail or wholesale company's ownership, because part of the stock may belong to a foreign investor who may influence decisions.

Distribution

Distributors are moving toward direct deliveries with their own sales force and delivery trucks to service retail grocery stores and chains, although cash and carry operations are common, too. Usually, one exclusive agent/distributor is appointed to cover the entire country. Small and medium-size companies make their purchases of imported products through importers and wholesalers who have a direct relationship with foreign suppliers. Most Estonian importers represent several different product lines. Importers may serve a large customer themselves or work with dealers. Few wholesalers undertake nation-wide distribution, and almost none carries a complete range of products. As noted previously, however, the large, new grocery chains are developing their own distribution centres.

Consumer Tastes and Preferences

Consumer preferences differ significantly among various income, age and ethnic groups. Preferences for new products are strong among the younger population, but a significant number of consumers remain at "the tasting level". With average per capita income still low, the consumption volumes of most food products are smaller than the optimum basket necessary for healthy nutrition. In January 2003, the average gross monthly wage was US\$ 580. The average family spends 28 percent income on food and alcohol. Of the 582, 000 people comprising the workforce, the official unemployment rate reached 5.8 percent in January 2003. Women account for nearly 48 percent of the workforce and contribute to the increased demand for meals consumed away from home. With a large proportion of two-income families, most Estonian customers prefer meals that are quick to prepare. Therefore, prepared, frozen and convenience food should be a key focus of US exporters. However, it should be noted that microwaves, refrigerators, and freezers have much more limited capacity than in the U.S. and Western Europe. Nearly 30 percent of the population live in rural areas. In rural areas where incomes are the lowest, farming provides many households with staples. According to surveys, 83 percent of consumers prefer domestic food products that are fresh, are free from additives, are familiar in taste and are low in price. Nevertheless, the large retail chains have observed that they are capturing market share from traditional farmers' markets. Consumer concern about the presence of genetically engineered products does exist to some extent, and there is a clear interest in local organic foods.

Food Standards and Regulations

The Estonian Food Act regulates the production, trade and distribution of food products, as well as health issues. The Food Act was effected in January 2000 based on EU directives, and since then clauses have been amended in view of Estonia's preparations for EU accession. Estonia is modifying sanitary and phytosanitary standards as well, and some of these have blocked U.S. exports of pork and beef. Estonia accepts U.S. poultry from about 50 plants, which have been approved by the Estonian Veterinary Authorities. Estonia will be a member of EU as of May 1, 2004 and then automatically takes over all EU model certificates. U.S. poultry exports stand to lose the Estonian market, unless the EU market has re-opened for U.S. poultry products by the time of Estonia's EU accession.

The Estonian veterinary legislation applies unified import certification of meat and meat products, dairy products and fish (Regulation 44, 1999). Special Laws regulate flows of alcohol, tobacco, meat, dairy products, and veterinary and phytosanitary legislation. Other ordinances include the use of additives in foodstuffs, usage and content of artificial flavorings, respective labelling, and level of residues. Regarding genetically engineered ingredients, Estonia will follow EU regulations, recommendations, and labelling and certification requirements. As of January 1, 2001, labelling is already required for foods produced of or derived from genetically engineered soy and corn (Regulation 176, Ministry of Agriculture, based on 98/1139/EC, and 49/2000/EC). Products that contain or consist of GMOs must adhere to requirements for deliberate release of GMOs, placing them on the market, and handling permits (258/97/EC and 97/618/EC) issued by the Veterinary and Food Board. The presence of GMO ingredients should also be clearly disclosed on product labels. Before the handling of a Novel Food is commenced, its conformity with regulations is examined. Based on this assessment, the Veterinary and Food Board issues a handling permit.

Every retail package requires a label (sticker) in the Estonian language with the name of the product, name of the producer and importer, origin, metric weight or volume, listed ingredients, storage conditions, use information, and expiry date or a best before date indications (Regulation 390, 99, Ministry of Agriculture). Please consult with the importer regarding specific packaging and labelling requirements.

The Estonian legal system is presently sufficiently developed to have in place both trademark protection and licensing provisions. There is no specific legal act to regulate franchises yet, and the parties to a franchise agreement are viewed as business partners. Franchising is increasingly being used for business expansion in Estonia.

Import and Inspection Procedures

Import of plant and plant products are controlled by the Plant Production Inspectorate and require an accompanying phytosanitary certificate. The import of meats and poultry, fish, fowl, animal feed and its components, and bio preparations are subject to state control by the Border Control Service. The Veterinary and Food Board carries out quality and compliance checks of imported foodstuffs, additives and supplements.

In cases where imported products fall into one of the categories requiring a special permit (Regulation 47 of the Minister of Agriculture), the importer must submit an application /request for a special import permit to the Veterinary and Food Board, indicating the importer's license number, recognition number of the manufacturer if required, desired quantity, arrival time and border entry point, product preservation conditions and purpose for importing the goods. Please consult with the importer regarding specific products.

Until the end of 1999, Estonia's import and export regimes were among the most liberal in the world, and no duties were applied to imports. As of January 2000, the MFN Treatment Customs Duty Act imposed MFN rates on imported goods of all countries, which have not entered free trade agreements with Estonia, including the U.S. At present, exports from the EU and countries, which are parties to free trade agreements with Estonia, are advantaged by zero duties. The highest MFN duty rates stand at 25-33 percent for pork, 48 percent for poultry meat, 39 percent for sausages, 10 percent for chicken legs and wings, 59 percent for rye, and 40-45 percent for barley and oats. Import tariff rates can be found at www.legaltext.ee/en, under title "Most Favoured Nation Customs Duty Act." Duties are not levied on goods transiting Estonian territory. Estonia's accession to the WTO in late 1999 has furthered the expansion of investment and trade.

SECTION III: Market Sector Structure and Trends

Food Retail Sector

The Estonian food retail market holds considerable potential for a wide range of competitively priced packaged goods targeted at high/middle income groups. In 2002, grocery sales totalled US\$ 882 million, of which food accounted for 64.3 percent. A 15 percent growth in retail food trade turnover is projected for 2004. In 2002, food was sold in 2,578 retail outlets, of which 112 were supermarkets. There were 12 retail food chains of broadly diverse sizes.

Nordic retail chains entered the Estonian retail market in the mid nineties and contributed to the consolidation of retail outlets. Several large self-service shopping centers with supermarkets have emerged in suburbs of Tallinn. Supermarkets and hypermarkets have become more influential, accounting for 45 percent share of food retail sector sales, mostly at the expense of small shops and markets. Competition between small groceries is intense, and the emergence of niche stores is developing. With the development of large supermarkets, and reduced price sensitivity of customers, the share of open-market food sales has been reduced below 20 percent.

For a new-to-market exporter targeting the Estonian food retail sector, it is advisable to find a professional wholesaler or a local agent with strategic distribution who is knowledgeable about the Estonian market and is able to negotiate and implement product introduction and promotion. Food wholesale companies are cooperating to a large extent because of the tough competition. To stay competitive, Jungent and AS Kaupmees operate a joint logistics company called VIA 3L. Smarten and Jungent have strong positions on the Estonian market. These companies have developed sound logistics and provide for minimum warehousing of goods.

Food Processing Sector

The food industry yields about 4 percent of Estonia's GDP, and 4.4 percent of total exports. The development of Estonia's food industry has been impeded by an inadequate domestic supply of agricultural raw materials, the relatively modest purchasing power of domestic consumers, and limited export possibilities. The Estonian government is now prioritizing the development of the food-manufacturing sector to secure domestic market share and to develop export opportunities. With the expansion of this sector, the demand for imported agricultural product ingredients should also continue to rise. Given the relatively small consumer base in the Baltic region, pan-Baltic food companies are beginning to emerge to enhance the competitiveness of the region's food industry. In 2002, the total output of the food industry amounted to US\$ 704 million, accounting for 22 percent of the country's total industrial sales. Raw inputs included fish, wheat flour, and meat, and valued US\$ 290

million, of which about 40 percent was imported. It should be noted that the choice of imported raw material might depend on the decisions made by the plant's foreign investors. Foreign investors, mostly Finns, have acquired significant interests in the Estonian food industry and strengthened their presence in the entire Baltic region, as the privatisation of the sector was almost completed in 1995. In 1999-2001, nearly US\$ 706 million were invested in the food industry. Investment demand will continue to increase because food enterprises must gear up to meet EU quality requirements.

The food industry has 15 sub-branches. Of the total gross output by food manufacturers, dairies accounted for 27 percent, the meat industry for 17 percent, beverage manufacturers for 18 percent, the fish industry for 13 percent, and bakeries accounted for 9 percent.

There were 634 food and beverage producers in Estonia in 2002. The concentration of production is high. The 4 largest meat producers accounted for almost 80 percent of meat production output, 4 fish processors accounted for about 46 percent of production, 4 dairies accounted for 53 percent of processed dairy products, and 4 major breweries accounted for 90 percent of the sector's production volume. Market access for Estonian product exports to the EU has also improved. Various agreements which have come into force over the period July 2000 to July 2002, reduced tariffs and other barriers impeding exports of Estonian agricultural and processed food products to the EU and increased export quotas. Only a few Estonian dairies and fish processors comply with the EU production and quality requirements and packaging standards required to be met to export to EU member countries. Estonia's exports to Russia are assessed double the Customs rates of those paid for comparable products from Russia's preferential trade agreement partners.

The largest food processors purchase raw materials and food ingredients directly from foreign exporters and through their own networks. Such products include raw fish, meat, spices, spirits, juice concentrates, wheat flour and condiments. US exporters should focus primarily on connecting with the larger players seeking direct relationships with foreign suppliers.

HRI Food Service Sector

A successful hotel/restaurant trade has rapidly developed in the past 3-4 years, in many cases as joint ventures with foreign firms. The growth within the hotel and restaurant sector has been boosted by the expansion of tourism. In 2002, the 3.25 million visits of tourists to Estonia generated revenues of roughly US\$ 682 million. Eating out on a regular basis has become increasingly popular within the higher income groups, which account for 10-15 percent of the population. An additional 20 percent eat out occasionally. Catering services are primarily operated by individual restaurants. In 2002, there were 277 restaurants in the market. Of the fast food enterprises, the largest chains were McDonald's (U.S.), Hesburger (Finland), Peetri Pizza, and Pappa Pizza. The new fast food outlets and restaurants with international style cuisines such as Mexican, Chinese, Vietnamese, Italian and Indian, have begun to change the structure of the food service market. Chinese and Japanese fast food outlets have become popular at hypermarkets. These companies use a lot of imported food products and ingredients purchased directly or through importers. Fresh products are the priority for a-la-carte restaurants, which purchase from both local suppliers and importers. Poultry, pork, fish and seafood, beverages, fruits, vegetables, nuts, sauces and spices are major imports. There is no centralized supply system for hotels and restaurants. Hotels and catering companies use a lot of imported food products, beverages, wine, and ingredients, which they purchase from local distributors. There are two hotel chains in Estonia with 4 hotels each: Reval Hotelligrupp AS and Scandic Hotels. An SAS Radisson Hotel opened in 2001. The Viru Hotel and SAS Radisson are the biggest hotels outside of chains in Estonia.

SECTION IV: Best High Value Product Prospects

There are opportunities for dry, chilled and frozen processed products. Rather unfamiliar to consumers are low fat, low salt, sugar-free, and cholesterol free products. We recommend: candies, marshmallows, snack foods, pasta preparations, muffins, baking chocolate/chips, barbeque foods/sauces, fresh fruits, vegetables, seafood, wine, graham crackers, nuts, wines, ready prepared meals or quick-to-prepare dishes.

SECTION V: Key Contacts and further information

State Veterinary and Food Board

Vaike Paala 3

Tallinn 11415

ESTONIA

T: 372 638 0079

F: 372 6211441

Email: vet@vet.agri.ee

www.vet.agri.ee

Plant Products Inspectorate

Teaduse 2

Saku Harjumaa 75501

Estonia

T: 372 671 2602

F: 372 671 2604

Email: plant@plant.agri.ee

www.plant.agri.ee

Plant Products Inspectorate

Teaduse 2

Saku Harjumaa 75501

Estonia

T: 372 671 2602

F: 372 671 2604

Email: plant@plant.agri.ee

www.plant.agri.ee

Chamber of Agriculture and Commerce

Vilmsi 53b

10147 Tallinn

Estonia

T: 372 600 9349

F: 372 600 9350

www.epkk.ee

Estonian Enterprise Register

T: 372 6113841

F: 372 6460165
Email: eer@eer.ee
www.eer.ee
Estonian Chamber of Commerce and Industry
Toom-Kooli 17
Tallinn 10130
Estonia
T: 372 646 0244
F: 372 646 0245
www.koda.ee/english.html

Estonian Investment Agency
Roosikrantsi Street 11
Tallinn 10119
Estonia
T: 372 627 94 20
F: 372 627 94 27
info@eia.ee
www.eia.ee

Estonian companies database
Valge Register
www.roland.ee

Association of Estonian Fruit and Vegetable Wholesalers
Parnu mnt. 139c-513
Tallinn 11317
Estonia T: 372 50 66339
epkhl@anet.ee

For including your product offers into the Baltics regional virtual trade fair, check site
<http://www.food-fair.com>

For general questions about product import, please contact:
Foreign Agricultural Service
U.S. Embassy Riga
Raina Blvd. 7
Riga LV1510
Latvia
Tel: +371 7036 212, 371 7036 200
Fax: + 371 7820047
agriga@apollo.lv

or the regional Foreign Agricultural Service marketing staff at U.S. Embassy Stockholm,
Sweden www.usemb.se/Agriculture

For more information on exporting U.S. agricultural products to other countries, please visit the USDA, Foreign Agricultural Service home page: www.fas.usda.gov

TABLE A: Key Trade and Demographic Information.

| | |
|--|------------|
| Agricultural Imports From All Countries (\$Mil) /U.S. Market Share (percent)* / | 652/2% |
| Consumer Food Imports From All Countries (\$Mil)/U.S. Market Share (percent)* / | 339/2% |
| Edible Fishery Imports From All Countries (\$Mil)/U.S. Market Share (percent)* / | 60/3% |
| Total Population (Millions)/Annual Growth Rate (percent) | 1.356/-0.8 |
| Urban Population (Millions)/Annual Growth Rate (percent) | 0.9/-0.8 |
| Number of Major Metropolitan Areas | 1 |
| Size of the Middle Class (Millions)/Growth Rate (percent) | 0.6/N/A |
| Per Capita Gross Domestic Product (U.S. Dollars) | 4,697 |
| Unemployment Rate (percent) | 9 |
| Per Capita Food Expenditures (U.S. Dollars), year | 546 |
| Percent of Female Population Employed | 48 |
| Average Exchange Rate US\$1 | 13.5 EEK |

* / Data from United Nations database

TABLE B: Consumer Food and Edible Fishery Product Imports**Estonia Imports**

(In Millions of Dollars)

| | Imports from the World | | | Imports from the U.S. | | | U.S Market Share | | |
|--|------------------------|------|------|-----------------------|------|------|------------------|------|------|
| | 2000 | 2001 | 2002 | 2000 | 2001 | 2002 | 2000 | 2001 | 2002 |
| CONSUMER-ORIENTED AGRICULTURAL TOTAL | 282 | 297 | 339 | 16 | 8 | 6 | 6 | 3 | 2 |
| Snack Foods (Excl. Nuts) | 27 | 27 | 30 | 1 | 1 | 1 | 0 | 0 | 0 |
| Breakfast Cereals & Pancake Mix | 3 | 3 | 3 | 0 | 0 | 1 | 0 | 0 | 0 |
| Red Meats, Fresh/Chilled/Frozen | 23 | 22 | 17 | 1 | 1 | 1 | 3 | 0 | 0 |
| Red Meats, Prepared/Preserved | 5 | 5 | 6 | 1 | 0 | 0 | 0 | 0 | 0 |
| Poultry Meat | 21 | 19 | 17 | 13 | 6 | 3 | 61 | 32 | 16 |
| Dairy Products (Excl. Cheese) | 24 | 24 | 16 | 0 | 0 | 1 | 0 | 0 | 3 |
| Cheese | 5 | 15 | 11 | 0 | 0 | 1 | 0 | 0 | 0 |
| Eggs & Products | 2 | 2 | 2 | 1 | 0 | 0 | 0 | 0 | 0 |
| Fresh Fruit | 23 | 26 | 27 | 1 | 1 | 1 | 0 | 0 | 0 |
| Fresh Vegetables | 9 | 12 | 14 | 1 | 1 | 1 | 0 | 0 | 0 |
| Processed Fruit & Vegetables | 19 | 19 | 30 | 1 | 1 | 1 | 2 | 3 | 2 |
| Fruit & Vegetable Juices | 12 | 8 | 5 | 1 | 1 | 1 | 0 | 0 | 0 |
| Tree Nuts | 2 | 2 | 2 | 1 | 1 | 1 | 39 | 43 | 40 |
| Wine & Beer | 20 | 18 | 22 | 1 | 1 | 1 | 2 | 2 | 2 |
| Nursery Products & Cut Flowers | 6 | 7 | 7 | 1 | 1 | 1 | 1 | 1 | 1 |
| Pet Foods (Dog & Cat Food) | 4 | 6 | 7 | 0 | 1 | 1 | 0 | 0 | 0 |
| Other Consumer-Oriented Products | 77 | 83 | 123 | 1 | 1 | 1 | 0 | 0 | 0 |
| FISH & SEAFOOD PRODUCTS | 30 | 43 | 60 | 1 | 2 | 2 | 3 | 4 | 3 |
| Salmon | 4 | 5 | 11 | 1 | 1 | 1 | 0 | 0 | 0 |
| Surimi | 3 | 4 | 8 | 1 | 1 | 1 | 16 | 26 | 18 |
| Crustaceans | 2 | 2 | 3 | 1 | 0 | 0 | 0 | 0 | 0 |
| Groundfish & Flatfish | 5 | 10 | 15 | 1 | 1 | 1 | 1 | 2 | 3 |
| Molluscs | 1 | 1 | 1 | 0 | 0 | 0 | 0 | 0 | 0 |
| Other Fishery Products | 16 | 22 | 23 | 1 | 1 | 0 | 1 | 2 | 0 |
| AGRICULTURAL PRODUCTS TOTAL | 535 | 567 | 652 | 24 | 22 | 14 | 4 | 4 | 2 |
| AGRICULTURAL, FISH & FORESTRY TOTAL | 651 | 714 | 833 | 25 | 24 | 17 | 4 | 3 | 2 |

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office

TABLE C: Top 15 Suppliers of Consumer foods and Edible fish

Estonia - Top 15 Suppliers**CONSUMER-ORIENTED AG IMPORTS**

| (\$1,000) | 2000 | 2001 | 2002 |
|----------------|----------------|----------------|----------------|
| Germany | 21,751 | 19,760 | 52,202 |
| Finland | 46,780 | 53,007 | 48,594 |
| Poland | 20,009 | 23,079 | 24,084 |
| Denmark | 18,248 | 22,431 | 23,203 |
| Sweden | 14,201 | 18,780 | 20,908 |
| Netherlands | 19,969 | 18,063 | 19,529 |
| Spain | 10,975 | 12,360 | 15,455 |
| Hungary | 9,441 | 10,839 | 13,575 |
| Latvia | 10,823 | 11,704 | 13,327 |
| Lithuania | 8,597 | 9,139 | 13,027 |
| France | 11,744 | 10,051 | 10,646 |
| Italy | 7,563 | 8,131 | 8,676 |
| Belgium | 6,063 | 6,674 | 7,308 |
| Brazil | 6,117 | 6,992 | 7,303 |
| Czech Republic | 1,708 | 3,905 | 5,827 |
| Other | 68,154 | 62,095 | 55,712 |
| World | 282,192 | 297,067 | 339,434 |

FISH & SEAFOOD PRODUCTS

| | 2000 | 2001 | 2002 |
|--------------------|---------------|---------------|---------------|
| Norway | 8,486 | 10,529 | 19,905 |
| Russian Federation | 6,728 | 9,330 | 10,286 |
| Chile | 937 | 2,764 | 4,009 |
| Lithuania | 370 | 1,312 | 2,852 |
| Netherlands | 595 | 2,232 | 2,770 |
| Sweden | 2,437 | 3,792 | 2,580 |
| Finland | 2,455 | 1,968 | 2,145 |
| United States | 750 | 1,595 | 1,852 |
| Denmark | 882 | 1,133 | 1,705 |
| United Kingdom | 771 | 1,078 | 1,365 |
| Ukraine | 118 | 688 | 1,206 |
| France | 56 | 386 | 1,152 |
| Germany | 873 | 1,881 | 1,046 |
| Argentina | 301 | 321 | 1,029 |
| Thailand | 153 | 158 | 928 |
| Other | 3,647 | 3,449 | 4,981 |
| World | 29,567 | 42,618 | 59,815 |

Source: United Nations Statistics Division