Our aim is to supply consumers with safe food that meets all requirements. This is facilitated by ensuring that all the activities constituting the food processing chain — from the production of raw material for food to making food available to consumers — comply with the requirements. On the other hand, consumers must be supplied with sufficient and true information about food, on the basis of which they can make their choices.

The fundamentals governing the food sector (i.e. handling of raw material for food and of food, self-checking by food business operators, and state supervision) set out in the Food Act, 276(284)/EC of the European Parliament, and of the Council laying down the general principles and requirements of food law, establishing the European Food Safety Authority, down the general principles and requirements of food law, establishing the European Food Safety Authority, and laying down procedures in matters of food safety. According to the Food Act, state supervision over food is exercised by the supervisory officials of the Veterinary and Food Board, Health Protection Inspectorate, and the Consumer Protection Board. Officials of the Tax and Customs Board have certain functions under the Food Act.

The Health Protection Inspectorate supervises retail and catering businesses. The Veterinary and Food Board supervises all other food business operators (such as the fishery, food industries, wholesale warehouses, and transport companies). The Consumer Protection Board supervises all other food business operators (such as the fishery, food industries, wholesale warehouses, and transport companies). The Tax and Customs Board also have certain functions under the Food Act.

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According to the Estonian Statistical Office, 527,200 tonnes of raw milk (Table 1) were produced in the first nine months of 2006, which is 3.1% more than in the same period in 2005. Milk bought in by dairy processing enterprises formed 62.7% of the total production and amounted to 462,100 tonnes. The volume of milk bought in by the dairy industry increased 5.2% in the first nine months of 2006 compared to the nine months of 2005.

The total output of bread and bakery enterprises accounts for one quarter (Figure 5). According to preliminary data, the bread and bakery processing industry increased 5.2% in the first nine months of 2006 compared to the nine months of 2005.

Table 1. Numbers of meat processing enterprises over the years

<table>
<thead>
<tr>
<th>Year</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of enterprises</td>
<td>122</td>
<td>122</td>
<td>122</td>
<td>122</td>
</tr>
</tbody>
</table>

The foreign trade balance of dairy products continued to be positive (MEEK +107.2) in the first eight months of 2006, the export of dairy products surpassed imports 4.4-fold. Dairy products accounted for 19.3% of total agricultural exports (MEEK 4958.6) and 30.9% of the export of food products. The major partners among EU countries were Germany (24.6%), Latvia (19.8%), Poland (10.8%), and the Netherlands (10.6%). Exports to Russia have increased 1.9-fold (MEEK 66.3), totaling 11.4% of total exports.

The foreign trade balance in meat and meat products was negative (MEEK -111.4), the first eight months of 2006 just as it was during the same period in 2005 (MEEK -113.5). Export of meat products amounted to MEEK 15.6% in the first eight months of 2006. The bulk of the production is exported to EU countries (54.4%), where the largest partners have remained the same: Latvia (23.3%) and Lithuania (15%). Exports to Russia accounted for 4.4% of total meat exports.

CEREAL PROCESSING INDUSTRY

Production

The cereal processing industry provides about 15% of the total output of the Estonian food industry in terms of value. The total output of bread and bakery enterprises accounts for over three-fourths of this, and that of the milling and feedingstuff industries accounts for one-quarter (Figure 4).

Consumption

Consumption of cereals as feedingstuff is in first place in terms of Estonian domestic market demand. In the harvest year 2005/2006, feedingstuff accounted for 66% of total cereal consumption; followed by human consumption (14%), consumption as seeds (16%), and industrial consumption (7%). Industrial consumption covers the use of cereals for production of alcoholic beverages and other products, except for food and feedingstuff.

The volumes of export and import increased 24.3% and 144%, respectively, compared to the previous year, the negative trade balance was MEEK 435.3. Estonia had positive trade balances with EU Member States Latvia, Greece, Slovenia, Cyprus, and Malta, and negative balances with all other EU Member States. Among the main partners outside the Community market, Estonia had positive trade balances with Russia, Switzerland, Ukraine, Kazakhstan and Moldova (see Figure 7).

FOREIGN TRADE

The value of agricultural products (Nomenclature of Commodities (Chapters 01–24) exported and imported in 2005 was MEEK 6950.1 and MEEK 10,985.9, respectively. Agriculture products formed 7.2% of total exports and 6.4% of total imports of commodities.

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MEAT INDUSTRY

The Estonian meat market in the first eight months of 2006 is characterized by similar product trends, a low level of specialization and tough competition on the domestic market. Exports of meat and meat products form 6.6% of total agricultural exports (7.3%) in the same period in 2005.

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The export of meat products during the same period in 2005 was MEEK 328.7. Most of the products were exported to EU Member States (97%), Latvia (33.9%) and Lithuania (31%). Exports to Russia accounted for 4.4% of total meat exports.

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During the first eight months of 2006, exports and imports of meat and meat products amounted to 10,961 and 25,101, respectively. In order to cover domestic market demand, 9,306 tonnes of meat was exported and 26.1% of meat was imported in the first eight months of 2005.

In 2006, there were 122 meat handling enterprises in Estonia, according to the Veterinary and Food Board (the data for 2006 is as of 17 November 2006).