



Tartu County FOOD STRATEGY

2022-2030

May 2022 Tartu



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Introduction

The topic of local food is gaining popularity in Estonia, much like in the rest of Europe. Various food networks have been formed, farm shops and markets are growing in number, regional trademarks have been developed, local events are being organised to highlight the regional variations of food, etc. Food production – and entrepreneurship in the food industry in a broader sense – is also traditionally an important economic sector in Estonia. The sector employs tens of thousands of people and is a significant export earner. On top of this, we are witnessing another global megatrend – a constant increase of the impact of ecological values. This involves organic farming and, more generally, healthy eating and placing value in local food. Food is a topic that directly affects every person's daily life – it would be hard to regard the industry as unimportant.

Although there are over 10 active food networks in Estonia, Tartu County as the second largest county is yet to form a joint food industry collaboration network for different interest groups. At the same time, food scene in Tartu County is strong and vibrant, with many of its participants well-known throughout Estonia and abroad. There are food industry establishments, agricultural companies, small producers, prominent catering enterprises, research and development activities based in universities, diverse food events and specific collaboration networks. The present food strategy is designed to fill this void by creating a common platform for food industry participants to harness as much of the region's potential and character as possible.



Children's author Mika Keränen present at an open Tartu Market. Photo: Maria Aleksandrovna

The Tartu County food strategy has been created as part of URBACT's international collaborative "Food Corridors" project. The wider goal of the project is to support the development of integrated strategies for food districts and provide the necessary input to local governments and institutions as well as national authorities to design interventions and draft policies related to the topic of food. The direct aims of the project include increasing the role of 'farm to table', that is, short product cycles, and promoting the collaboration and involvement of food enthusiasts in producing and marketing food products.



Transnational meeting in Tartu County, seminar at Estonian National Museum.
Photo: Kadri Püü

The first stage of the project included developing a background study of the Tartu County food industry (see Appendix 3 of the strategy), and forming a food industry collaboration group as part of the study. The food strategy created as a continuation of the background study includes, in summary, a description of the current food industry situation and its key strengths and challenges (chapter 1), a common vision, goals and activities (chapter 2), and an action plan for the coming years (chapter 3). Please note that neither the strategy nor the action plan is firmly set. Both the set goals and action plan should be monitored and adjusted on an annual basis.

The Tartu County food strategy was developed under the direction of Tartu County Development Association; the strategy process was implemented and the final document created with the help of Cumulus Consulting OÜ. Over 100 representatives of private, public and third sectors participated in the process. The authors of the strategy would like to express their sincere gratitude to everyone involved.

1

Food strategy: background and current situation

1.1. Food strategy development process

The strategy was developed in accordance with URBACT guidelines and goals of the “Food Corridors” project. Representatives of all key target groups (the food industry ecosystem) were involved in the strategy development process. The “Food Corridors” project goals, which the strategy was based on, were as follows:

- To support the development of integrated strategies for food regions and provide the necessary input to local governments and institutions as well as national authorities to design interventions and draft policies related to the topic of food.
- To increase the role of ‘farm to table’ concept, i.e., short product cycles.
- To promote the collaboration and involvement of food enthusiasts in producing and marketing food products.
- To enable the exchange of knowledge and experience through participation in the URBACT programme.
- To support socioeconomic, environmental and sustainable development strategies of the European Union.

Cooperation with URBACT partners and experts

Tartu County Food Strategy 2022-2030 was developed under the URBACT cooperation project “Food Corridors”. In cooperation with the “Food Corridors” partners, we created a roadmap at the initial stage of the project in December 2020, specifying the goals, expected results, partners, communication activities and activity timeline (see Appendix 4).

According to URBACT programme methodology, the food strategy was developed in the following stages:

1. Activation (May-December 2020).
2. Planning of activities (January-December 2021).
3. Planning of implementation of activities and finalisation of food strategy development (January-August 2022).

With the support and guidance of “Food Corridors” network experts, there was a continuous capacity improvement process during these stages, in accordance with the URBACT programme strategy development guidelines. In 2021, the following training events were organised as part of international meetings between “Food Corridors” network partners:

1. Defining the vision and thematic fields – March 2021.
2. Idea generation for thematic fields (brainstorm) – May 2021.
3. Idea generation for thematic fields (impact vs. challenges) – May 2021.
4. Idea generation for thematic fields (setting priorities), from ideas to action, introduction of core components of the strategy – June 2021.
5. Defining goals, expected results, resources and assets, management, partners and timeframe – September 2021.
6. Working draft of the strategy and its review – November 2021.

Additionally, “Food Corridors” partners gathered know-how about important aspects of strategy development, e.g., risk analysis, funding options, surveillance and evaluation of results, during the e-University organised by the URBACT programme in January 2022. Furthermore, international meetings conducted in 2022 also contributed to the final strategies of the partners (including face-to-face meetings in April in Tartu, Estonia and in May in Coimbra, Portugal).



Transnational meeting in Tartu County, visit to Viinamärdi Farm.
Photo: Kristiina Tammets

Pursuant to the URBACT programme guidelines, learning activities and knowledge transfer among partners were linked to the participation process where each partner created a local network contributing to the development of a regional food strategy. Knowledge gained from the international meetings was implemented when developing strategies at a local level.

Mainly due to the COVID-19 pandemic, during the strategy development process we have had to flexibly adjust the network's work plan and each partner's input. The pandemic also had a considerable impact on the activities of food networks and the development of the participation process. Despite this, we managed to conduct effective discussions via e-channels, and engage local networks.

The strategies of the external partners of the “Food Corridors” project have highlighted several challenges and related goals that are also central to the Tartu County food strategy. For instance, the creation of an information and cooperation platform for producers and consumers, supporting innovation, decreasing food waste, developing local brands and increasing the level of awareness are also relevant to the strategies of other project partners. Cooperation and information exchange in these areas is also important in implementing the strategies.



Transnational meeting in Tartu County, seminar with Elva Municipality representatives.
Photo: Kadri Püü



Transnational meeting in Tartu County, lunch on the shore of Lake Peipus.
Photo: Linda Suurmets



Transnational meeting in Tartu County, visit to Salvest AS.
Photo: Linda Suurmets

Cooperation with the local food region and network generation

The development process of Tartu County food strategy consisted of two main stages. In the first stage (January-June 2021) we conducted a background analysis of the food industry, and in the second stage (August-December 2021) we created an integrated food strategy. In January-March 2022, the working draft of the strategy underwent further specification. All stakeholders were involved in the process already in the first stage, including private, public and third sector, as well as the entire food industry chain across sectors.

We started creating the integrated food network during the background analysis stage, involving research institutions, local governments, business owners, as well as the third sector in the process. In total, nearly 100 people from more than 60 organisations participated in the activities, including producers, processors and marketers of agricultural products, catering enterprises, organisers of (food) events, research and development institutions and support structures operating in the field, as well as public and third sector organisations and cooperation networks involved in the food industry. Table 1 provides a more detailed overview of the activities conducted during the process.

Tartu County food strategy development process and partners involved¹

STAGE/ACTIVITY	PARTICIPATING ORGANISATIONS
Stage I: FOOD INDUSTRY BACKGROUND ANALYSIS	
1. Focus group interviews with target group representatives to map out current situation and expectations (April-May 2021)	7 focus group interviews (35 participants in total): <ul style="list-style-type: none"> • Research and development organisations • Local governments • Tourism and food networks • Food producers • Food processors • Caterers • Food event organisers
2. Personal interviews to map out current situation (April-June 2021)	4 personal interviews: <ul style="list-style-type: none"> • Farmers' Market of Tartu Lõunakeskus • Jõgeva County food network • Tartu Science Park • AS Salvest
3. Compiling a background analysis report	<ul style="list-style-type: none"> • Written by a project consultant, results were introduced at a food industry strategy seminar
Stage II: STRATEGY DEVELOPMENT	
4. Organising a vision seminar and defining the food network goals and lines of action (September 2021)	Strategy seminar involving all stakeholders, with nearly 50 participants representing target groups specified in section 1.
5. Conducting action plan focus groups to define area-specific goals and activities (October 2021)	4 action plan focus groups based on key themes of the strategy (all target groups were involved, more than 60 participants in total): <ul style="list-style-type: none"> • Bringing together food producers, caterers and consumers • Common brand and marketing for Tartu County food industry • Product development and innovation • Promoting awareness
6. Compiling a working draft of the strategy and conducting discussions (November-December 2021)	<ul style="list-style-type: none"> • The working draft of the strategy was created in November 2021, and a collaboration seminar was held in December 2021 to discuss the strategy and gather feedback • The working draft of the strategy was updated based on seminar results and submitted to URBACT experts for feedback
7. Updating the final strategy document, consulting with URBACT experts (January-March 2022)	<ul style="list-style-type: none"> • The strategy was updated based on feedback from URBACT experts • The final strategy was introduced to cooperation network participants

Table 1

¹ See Appendix 2 for the list of participants; an overview of the activities carried out within the process can be found at <https://www.tas.ee/arendustegevus/tartumaa-toidupiirkond/>



Vision seminar of Tartu County food region. Photo: Robi Zuts



Tartu County food network, vision seminar in September 2021.
Photo: Robi Zuts

1.2. Short overview of the region

This food strategy has been created for Tartu County, which has a territory of 3 349 km², comprising about 7.5% of the total area of Estonia. According to the population registry, on 1 January 2021 the number of inhabitants was nearly 154 000, which constitutes about 11.5% of the Estonian population. It is Estonia's second largest county after Harju County. Following the administrative-territorial reform in 2017, there are eight local government units in Tartu County, including one city (Tartu) and seven parishes (Elva, Kambja, Kastre, Luunja, Nõo, Peipsiääre and Tartu). As the second largest city in Estonia, Tartu is the centre of the entire Southern Estonian region (*Figure 1*).

Topographically, Tartu County is mostly flat with forest and arable land each constituting about one third of the territory, while bogs encompass nearly a quarter. The conditions for agricultural development are good – in terms of average soil quality rating, the county ranks among the best in Estonia. Geographically, Tartu County is bordered by Lake Võrtsjärv to the west and Lake Peipus to the east; the two lakes are connected by the 100 km long Emajõgi river. Alongside agriculture, these water bodies also create suitable preconditions for the development of the fishing industry. Most of the utilised agricultural area, which is 1 017 km² according to Statistics Estonia, is used for growing cereal, wheat and fodder crops.

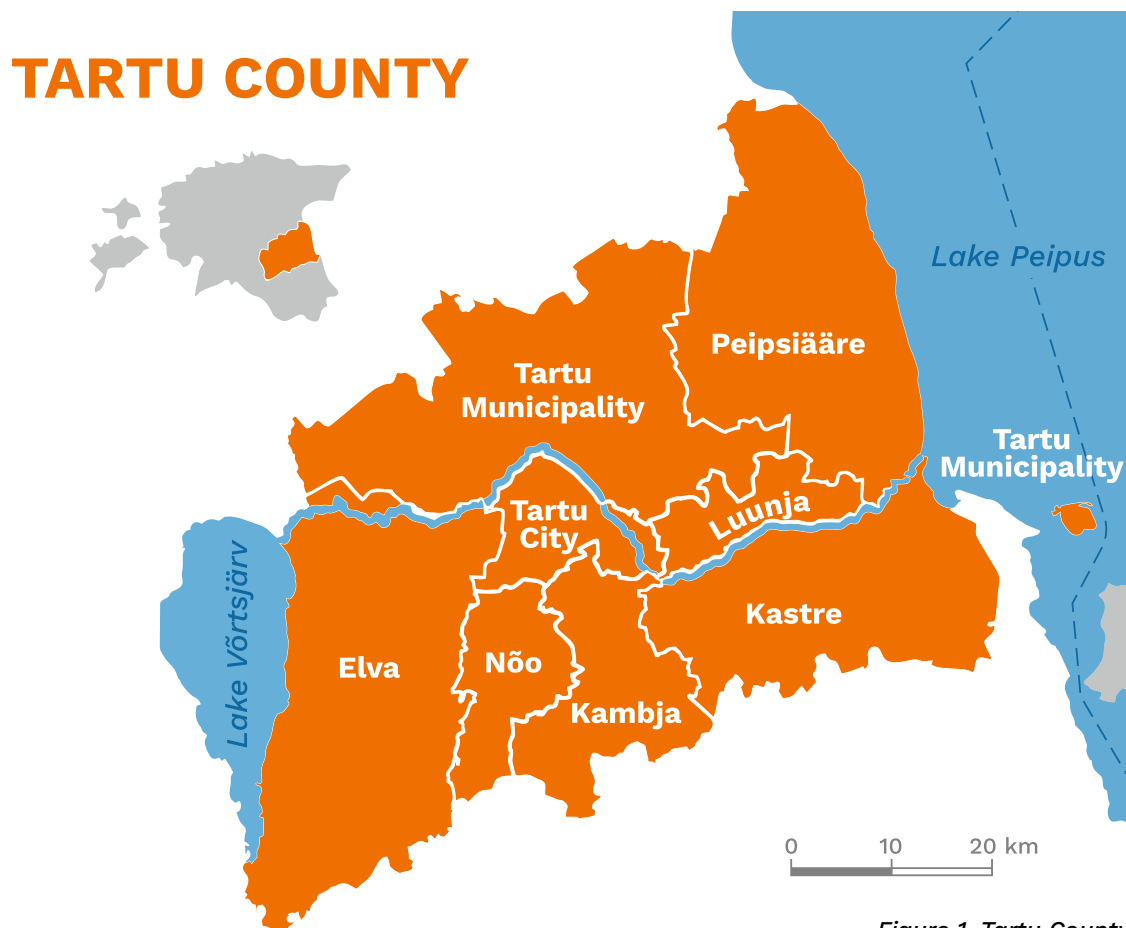


Figure 1. Tartu County

An important asset for the development of the entire county and its food industry is the city of Tartu – the centre of the region has approximately 100 000 inhabitants and it boasts 1 000 years of history. Tartu is a magnet for Southern Estonian regions in terms of jobs, trade and a number of services, such as health care. Internationally, Tartu is primarily known as a university town with long-standing traditions.



River Emajõgi and Arch Bridge. Photo: Tarmo Haud



Lake Peipus in summer. Photo: Ahto Sooaru



Tartu 2024 Team and Town Hall. Photo: Kiur Kaasik

In 2024, Tartu is set to become one of the three European Capitals of Culture. In this project, the city will be supported by its adjacent municipalities of about 50 000 inhabitants (the seven parishes of Tartu County) and on a broader scale, all the Southern Estonian counties (Jõgeva, Põlva, Valga, Viljandi and Võru) will provide their support. In total, the six Southern Estonian counties are home to more than 300 000 people.

The county's most important business sectors in terms of sales revenue, export and jobs are wholesale and retail trade, the processing industry and construction. Agriculture is more prominent in parishes like Kastre, Luunja, Nõo and Peipsiääre. To conclude, the business scene in Tartu County is lively and versatile. Combined with a solid basis of public sector institutions and favourable preconditions for development, this places the region firmly in second place in Estonia after Harju County.

1.3. The county's food scene and cooperation network

The purpose of the Tartu County food strategy is to involve participants from all sectors (private, public and third sector) in its activities, and to cover the entire food industry chain across sectors. The food scene and cooperation network of Tartu County is therefore made up of producers, processors and marketers of agricultural products, catering enterprises, organisers of (food) events, research and development institutions, and support structures operating in the field, as well as public and third sector organisations and cooperation networks involved in the food industry.

In defining the range of businesses associated with the food industry in Tartu County, we used the Estonian Classification of Economic Activities (EMTAK). Food as a topic is present in all sectors: the primary sector, processing industry and the service sector. Tartu County food industry includes the following (more detailed information is provided in Appendix 3 of the strategy, food industry background survey):

1. Agriculture, forest management and fishing, including **plant production and livestock farming, fishing and aquaculture**.
2. Subsectors of the processing industry, **manufacturing of food products and beverages**.
3. Accommodation and catering, including **food and beverage service activities**.

Based on this classification and according to annual reports submitted to the business register in 2019, there are 885 food industry companies in Tartu County; 471 of them have at least one employee and revenue of at least 10 000 euros. **In 2019, the total sales revenue of these companies was around 420 million euros, and the companies jointly employed about 4 600 people** (Table 2).

Tartu County food industry companies²

	All companies	Filtered companies ³	'Passive companies'
Number of companies	885	471	414
Sales revenue (million euros)	419.1	415.0	4,1
Number of exporting companies	69	61	8
Export revenue (million euros)	45.05	45.03	0.03
Number of employees	4 616	4 567	49

Table 2

In 2019, the percentages of food industry enterprises amongst the Tartu County business sector were, as follows: **sales revenue 6.8%, export 3.7% and employment 10.7%**. The breakdown by fields of activity in the food industry in 2019 was, as follows: 47% of companies operated in plant production and livestock farming, 37% in catering and 10% in the food industry. At the same time, **the largest revenue generator was clearly the food industry, generating 45% of sales revenue and 61% of export earning**, and employing nearly 2 000 people. The second largest employer (with about 1 500 employees) was the catering sector, characterised by the lowest added value and, accordingly, the lowest salary. The highest added value per employee was created in plant production and livestock farming (about 1 150 employees). The beverage industry does not have many companies, and it is dominated by A. Le Coq with about 350 employees and a revenue of 130 million euros, which greatly impacted the entire food industry export results.

² Business Register, 2019 annual reports

³ Sales revenue at least 10 000 euros and 1 employee

Tartu County boasts a number of large and well-known **food industry companies** whose operations span across multiple fields. Companies known throughout Estonia and employing over 100 people include, besides A. Le Coq (beverage production), Salvest AS (food production), Nõo Lihatööstus AS (production of meat and poultry meat products), Estover Piimatööstus OÜ (production of dairy products), Gustav Cafe OÜ (core business – production of confectionery products) and Eesti Leivatööstus AS (production of breads and pastries). There are many other well-known companies operating in the field, such as Tartu Mill AS, Rõngu Pagar OÜ, Rõngu Mahl AS, Pühaste Pruulikoda OÜ, Andre Juustufarm OÜ, Astri Köök OÜ and others. The number of industrial enterprises with a revenue exceeding 1 million euros was 23.

In plant production and livestock farming, there are 3 larger companies with more than 100 employees: Grüne Fee AS (vegetable production), Tartu Agro AS (mixed farming), Plantex AS (seedling production), with revenue ranging between 5 and 10 million euros. There are also a couple of dozen companies operating in this field which employ 10–30 people, with revenues mostly exceeding one million euros.

The number of catering companies in Tartu County with more than 10 employees (between 10 and 50) is about 50. Only a few of them are located outside the city borders. There are approximately 15 accommodation establishments with more than 10 employees in the county (the largest one, Dorpat OÜ, employs over 100 people). Most of these companies also provide accompanying catering services.

An important question to consider when creating a food strategy is **how to ensure a balanced approach that caters for both large and small companies** (including self-employed persons operating in agriculture), **and creates value for the whole sector**. It should also be considered that higher salaries, higher added value and exports are mainly linked with industry (partly also plant production and livestock farming), whereas the high quality of catering companies in a narrower sense shapes the attractiveness of the living and tourism environment, and creates opportunities for lifestyle companies and seasonal workers (including university students)⁴.

Public and third sector

The public sector comes in contact with the food industry on a daily basis, mostly through its educational institutions. In the 2020/2021 academic year, there were more than 21 000 students in general education schools in Tartu County, and nearly 8 800 attending the county's kindergartens. If we add Tartu Vocational Education Centre, which is owned by the City of Tartu, and municipal care homes, to this list, we can say that **the local governments in Tartu County organise daily catering for about 35 000 people**, thus representing an important link in the local food industry chain. In the public sector, there is a small number of additional large institutions that provide catering, such as Tartu University Hospital. The importance of local governments in the food industry lies primarily in ensuring that the food served in kindergartens and schools is healthy and

⁴ See also the background study of the Tartu County food industry at https://www.tas.ee/wp-content/uploads/2021/07/Tartumaa-toiduvaldkonna-taustauuring_raport.pdf

locally sourced as much as possible. In a more subtle way, however, it also contributes to shaping people's attitudes to food, from pre-primary education and beyond. With this in mind, the target group of the Tartu County food strategy therefore includes all inhabitants of the county.

An undisputed strength and source of uniqueness for Tartu County is its **research and development potential related to the food industry**. Institutions directly involved in the food industry include the University of Tartu, Estonian University of Life Sciences, Tartu Science Park and other development organisations and private companies. The overriding aims of the region's food strategy include coming up with innovative solutions in food entrepreneurship, and creating awareness and shaping patterns of consumption in the region.



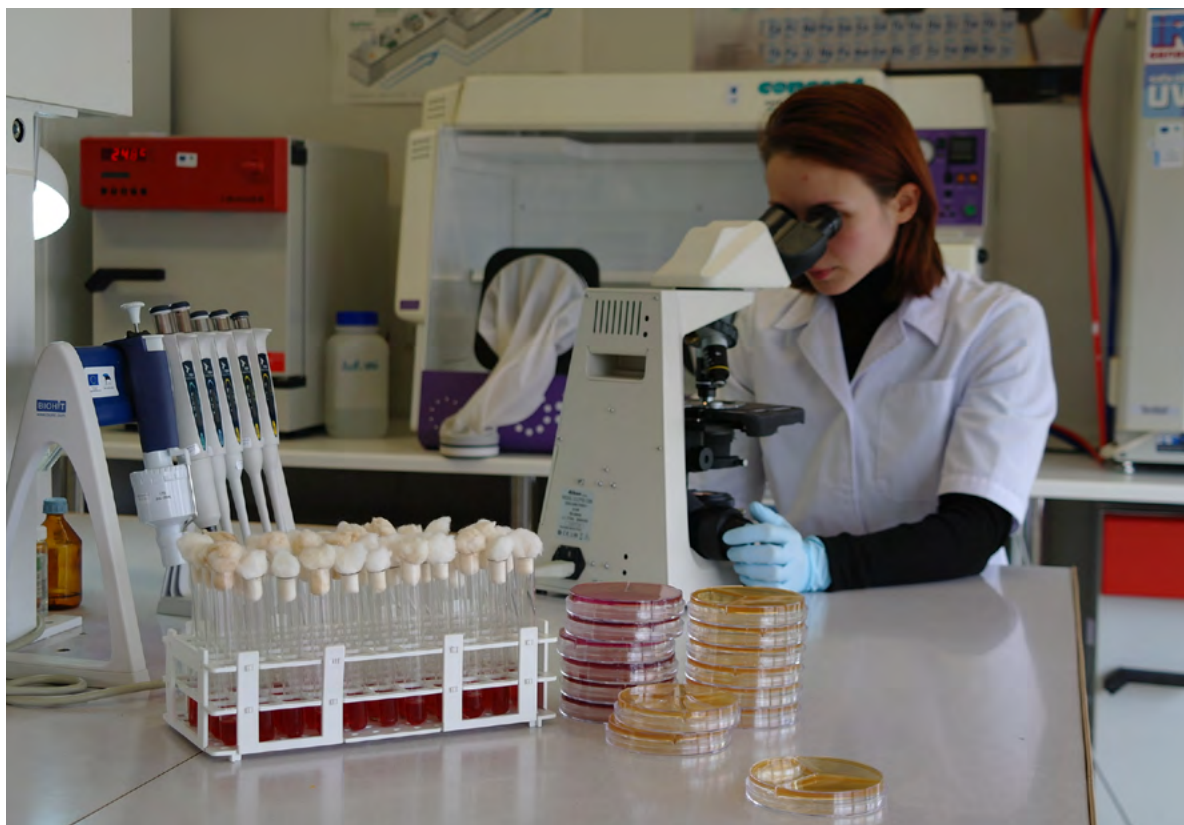
Organic cabbage field. Photo: Elen Peetsmann



Sowing carrot seeds in the garden of Research Centre of Organic Farming.
Photo: Elen Peetsmann



BioCC OÜ. Laboratory of Fermentation. Photo: Kaisa Põhako



BioCC OÜ. Laboratory of Microbiology. Photo: Kaisa Põhako

The third sector institutions that play an important role in promoting the industry's development include a number of **food and tourism networks**, such as Tartu Market and Farmers' Market of Tartu Lõunakeskus, which provide a sales environment for small producers and traders; tourism institutions such as Tartu County Tourism Foundation, Onion Route NGO, Community Kitchen of the Lake Peipus Region NGO, Peipsimaa Tourism NGO, and others. The companies operating in the field also draw value from umbrella organisations, such as Tartu County Farmers Union NGO. The initiator and coordinator of the county's food strategy is the Tartu County Development Association, which funds micro-enterprise projects focusing on local food development through the LEADER measure. The county also organises dozens of traditional and well-known **food events**, such as Tartu Food and Wine Festival, Café Day of Tartu city districts, Apraaditehas (the Widget Factory) Festival, Varnja Fish Fair, The Onion Route Buffet Day, the Open Farm Day and many more.



Farmers' Market of Tartu Lõunakeskus. Photo: Robert Lang

The aim of the Tartu County food strategy is to join all the above sectors under one single network. Until the launching of the food strategy's compilation process in 2021, there were no such networks in Tartu County that would have systematically included all the parties. Cooperation has taken place in the form of various events; for instance, within tourism networks or between specific producers and caterers. Such an operation model means that thus far, cooperation has partially been fragmentary and its potential is largely untapped. Therefore, all key parties were invited to participate in the development of the strategy and the related food network. This also creates opportunities for considerably broader and more efficient cooperation.

1.4. Main challenges and strategy focus areas

As part of the food industry background survey (see also Appendix 3), we determined the main strengths and weaknesses (7+7) that the network could help resolve and which form the basis for this food strategy (Table 3).

Key strengths and weaknesses of Tartu County food industry

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> The City of Tartu as the centre of the county and Southern Estonian region is a large enough market for agricultural companies, processors, caterers and other food industry participants The Tartu County food scene and food business is sufficiently large, versatile, and distinctive; the county boasts strong food producers (from vegetables to fish), different food processors (from drinks to cheeses), larger and smaller companies, etc. The county has great natural conditions for growing local produce, the average soil quality rating is good and the percentage of high-quality arable land is high Local produce and food are increasingly highly valued and used, there are several active and lively initiatives in the county (e.g., Taluturg (Farmers' Market), which provides a common platform for nearly 200 small producers), new businesses have entered the market, etc. Tartu's universities and research institutions have created excellent conditions for food-related research and development activities, there are the necessary laboratories, companies engaging in product development, etc. The county boasts a multitude of well-known tourism and food events as well as tourism networks, which create excellent preconditions for developing and promoting food-related initiatives There is a significant number of active food industry participants in the county (producers, processors, caterers, network leaders, representatives of R&D institutions, etc.), who are open and willing to combine their efforts in promoting the food scene 	<ul style="list-style-type: none"> The food traditions in Tartu County are undefined; there is no single county-level (food) brand and therefore no joint marketing efforts The county lacks an information base and collaboration network, which would connect local producers (growers of agricultural products, small producers, etc.) and consumers (private individuals, caterers, etc.); cooperation between entrepreneurs from rural and urban regions, information exchange, experience sharing, etc. is insufficient There are few high-level catering facilities outside the City of Tartu, and their quality varies. What is more, catering facilities located in the city also occasionally struggle with the availability of local high-quality produce Small producers (primarily) may find it difficult to find distribution channels, for example those just starting out find it difficult to get access to retail chains or find export opportunities In public sector institutions (kindergartens, schools, other institutions), opting for and using more local clean produce poses a challenge, which is partly due to limitations caused by public procurement regulations, but also due to the level of people's awareness There is room for development in consumer awareness, i.e., placing value in and using local clean produce (private consumers and educational institutions, for instance); imported goods are widely used mainly due to their price, while not much thought is given to where it comes from and what it contains There is room for development in combating food waste, using catering waste and, in a broader sense, the sustainable management of resources (e.g., joint approach to logistics, reducing carbon footprint)

Table 3

In summary, one of the most important preconditions for the joint development of the Tartu County food industry is, first, **a sufficiently large local market and, second, diversity in the food scene** (businesses, events, networks, etc.) **and favourable natural preconditions**. Therefore, one of the most important focus areas for the county-level food network to pursue is in bringing together the growers and processors of local produce and consumers (including gathering and spreading the relevant information). To support the use of local and clean produce, it is also important to **continuously work on improving the awareness** of the target group. This is something to which the food network can also jointly contribute.

In the process of jointly developing the food network, it is important to clarify and explain **Tartu County food traditions and their uniqueness** – this could create the basis for developing a common food brand. An interesting option here is to use our scientific potential; for example, information available in Estonian National Museum (what are the historical food specifics of Tartu County (food legacy) and how to bring them to the modern day). A key element in creating a common food brand is ensuring that it is a worthy addition to the existing strong brands (e.g., UMA MEKK, Saaremaa Ehtne, etc.), and that it supports and expresses local flavours, is attractive for consumers and clearly stands out from the competition.



Widget Factory Festival. Photo: Kiur Kaasik



Tartu Food and Wine Festival. Photo: Evelin Lumi



Onion Route Buffet Day. Photo: NGO Onion Route



Bringing the community together, providing local raw materials and introducing local life –
Peipsi Food Street 175 km. Photo: Tiit Grihin

An important activity component of the food network could also be **supporting product development and innovation**, since the county already has the relevant preconditions in the form of its universities and research institutions. **Healthy, organic and functional food** and similar keywords are gaining more and more attention in the world; therefore, initiatives involving these keywords have strong future potential. When it comes to innovation, an additional keyword is **digitalisation**, both in terms of production as well as sharing information and marketing activities.

Since consumption habits are formed in childhood, it is also important to focus on children's facilities (kindergartens, schools) as part of the food industry development strategy, as well as finding ways to **start using more local produce in educational institutions**, and improving children's and young people's general awareness on the topic.

In summary, the food industry quantitative analysis includes the following:

- One clear focus of the food strategy is to **bring together food producers, caterers and consumers in a more efficient way**. A broader goal of this is to promote and increase the consumption of local clean produce, which in the longer term could propel the development of the county's primary sector, processing industry, catering and other involved fields (e.g., tourism).
- In order to create a unified front for the county in the food industry, **it is important to develop a common brand** and/or clearly define and communicate the county's unique features. Currently, no such brand exists; however, most involved parties have expressed interest in it (to support joint marketing efforts, etc.).
- As a unique feature of Tartu County, one goal of the food strategy should also be the **promotion of product development and innovation** in the sector by harnessing the potential of universities and research institutions.
- Another important goal of the food network is in **organising the exchange of information and experience, along with general activities geared towards increasing awareness and improving cooperation** among the parties involved.

The next section describes the vision, goals and main areas of activity for the Tartu County food industry.

2

Strategy

Based on an analysis of the current situation, the Tartu County food strategy is designed with four focus areas in mind. Each focus area has a defined strategic goal (SG) and a desired outcome described in greater detail. The four goals have been combined in a description of the vision for 2030. A description of the unique characteristics of Tartu County and underlying implementation principles form the basis for implementing the food strategy.

2.1. Unique characteristics and guiding principles of Tartu County food network

What lends the Tartu County food network a unique character is the **skilful use of research and development potential** derived from universities and development organisations operating in the field. Tartu County also stands out among other similar networks thanks to the broad-based and versatile nature of its participants, featuring larger and smaller producers, caterers from urban and rural regions, public sector institutions (including universities), event organisers and others. A well-functioning collaboration model is supported and ensured by **the City of Tartu as a strong focal point**, where both business owners and public sector organisations value local produce and the development of regional cooperation and food culture.

Guiding principles:

- **Valuing local produce** – valuing local produce is a conscious choice in both the public and private sectors, both in industrial as well as catering enterprises.
- **Innovation** – the Tartu County food sector uses innovative solutions in industry, small-scale production and catering. The sector works closely with universities and research and development institutions in developing new products as well as improving the existing ones, and in developing further both traditional and new initiatives.
- **Collaboration and co-creation** – all involved parties participate actively in the development of the food scene; common initiatives are led by people from different sectors and organisations throughout the county.
- **Distinct character and versatility** – the food scene in Tartu County is versatile; there are successful large industrial enterprises and top restaurants, as well as authentic local small-scale businesses operating in a variety of sectors that honour the local traditions.

2.2. Vision, strategic goals and lines of action

Vision for 2030

Tartu County is a well-known food region in Estonia and Europe. Public and private sector caterers mainly use local produce⁵. Food production, processing and presentation in Tartu County is renowned for its science-based, innovative approach. People in Tartu County value healthy and local food; the food scene is vibrant, boasting a wide variety of actively involved companies and organisations. The food industry collaboration network operates efficiently, covering all sectors, including producers, caterers and consumers.

To realise this vision, we have established **four strategic goals (SGs)**, and under each goal we have defined the main lines of action that form the basis for a more detailed action plan.

SG 1

Efficient exchange of information and knowledge among producers, caterers and consumers; local food is easily available for everyone.

Description of the desired outcome

The county has a perfectly mapped out collaboration platform which provides 24/7 information on the supply and demand of produce and local food. The platform is actively used by businesses growing produce, (small) producers, caterers and private consumers. Local food reaches caterers from both private as well as public sectors. There are more points of sale, markets (e.g., pop-up markets), etc. offering local products close to the consumer both in the city and in rural areas. Food industry entrepreneurs and organisations engage in efficient information and knowledge exchange, share their best practices and success stories, and join forces in developing their know-how and skill base.

Main lines of action:

- 1.1. Systematic mapping of food industry information; development and administration of the collaboration and information platform.
- 1.2. Organisation of regular information exchange, common events, seminars, training events, etc.
- 1.3. Creation of new distribution channels and points of sale, and further development of existing ones.

⁵ By local produce we mainly mean raw products sourced from Tartu County, but the term can partly be expanded to include the entire Southern Estonian region, and in case of specific product groups, the whole country

SG 2

Tartu County food industry has a common and distinctive brand. Key representatives of the sector use the brand and it is well known across Estonia and internationally.

Description of the desired outcome

The Tartu County food industry has a common, distinctive and trustworthy brand that places high value in local and clean food. The brand is used by larger and smaller producers, processors, caterers and event organisers, as well as other industry participants. Thanks to continuous development and marketing efforts, the brand is well known among consumers. The county has products characteristic of the region, and people know and recognise these products. The products represented by the brand are available in retail stores, catering sites and elsewhere, and consumers can find them easily. The process has helped launch new food-related businesses, increase sales revenue and export volume, and solidify the image of Tartu County as a well-known food region in Estonia and Europe.

Main lines of action:

- 2.1. Creation of Tartu County food industry brand; joint marketing efforts.
- 2.2. Working towards transforming the Tartu County food region into an Estonian and European food region.

SG 3

Tartu County food industry employs innovative and science-based solutions that are ecologically friendly and place high value in local resources.

Description of the desired outcome

Tartu County food industry enterprises use science-based and innovative solutions in the production process, packaging, marketing activities, logistics, and in developing information and collaboration platforms. The innovation awareness of food industry participants is high, and their products and services are green and sustainable. The ingredients and origin of the products are easy to understand and clearly visible for consumers.

Main lines of action:

- 3.1. Cooperation with research and development institutions to improve innovation capability in the food industry.
- 3.2. Implementation of innovative food industry projects, including development of products, services, packages, logistics, etc.

SG 4

People in Tartu County are conscious consumers of healthy local food; food waste and carbon footprint in the sector have reduced.

Description of the desired outcome

All consumers are aware of the benefits of local healthy food. Attitudes towards valuing local food, produce, food-related traditions and sustainable consumption have been systematically shaped since kindergarten. Food waste has decreased, local food is visible and accessible to everyone, and food-related news reaches all the target groups via different channels.

Main lines of action:

- 4.1. Shaping of consumption habits and attitudes; organising competitions, campaigns, etc. to value local healthy food.
- 4.2. Involving supermarket chains in introducing food from Tartu County.

2.3. Strategy Card

The strategy card on the next page summarises the food industry strategy.



Preparing cheese for customers. Photo: Renee Altrov

TARTU COUNTY FOOD STRATEGY 2022-2030



Vision

Tartu County is a well-known food region in Estonia and Europe

Public and private sector caterers mainly use local produce. Food production, processing and presentation is renowned for its science-based, innovative approach. People in Tartu County value healthy and local food; the food scene is vibrant, boasting a wide variety of actively involved companies and organisations. The food industry collaboration network operates efficiently, covering all sectors, including producers, caterers and costumers.



Strategic goals

SG 1



Efficient exchange of information and knowledge



SG 2



A common and distinctive brand



SG 3



Innovative and science-based solutions



SG 4



Conscious consumption of healthy local food



Lines of action

1.1. Systematic information mapping and creation of a collaboration platform

1.2. Regular information exchange and events

1.3. Development of distribution channels and points of sale

2.1. Creation of a brand and shared marketing efforts

2.2. Working towards transforming the Tartu County food region into an Estonian and European food region

3.1. Cooperation with research and development institutions to improve innovation capability

3.2. Implementation of innovative food industry projects

4.1. Shaping of consumption habits and attitudes

4.2. Involving supermarket chains



Guiding principles



Valuing local produce



Innovation



Collaboration and co-creation



Distinct character and versatility

3

Implementation plan

3.1. Action plan 2022-2025⁶

SG 1

Efficient exchange of information and knowledge among producers, caterers and consumers; local food is easily available for everyone.

Line of action 1.1: Systematic mapping of information related to the food industry; development and administration of the collaboration and information platform

Activity	Expected result	Resources/ sources	Responsible party/ Participants	Time
1.1.1. Recruiting food network Project Manager	The network has a competent and motivated leader	40 000 euros per year/ TAS ⁷ budget; URBACT; AMTC	TAS/ network members	05.2022
1.1.2. Creating detailed financing plan for the 2022-2025 action plan, drafting projects	Resources required for implementation of the food strategy are planned in detail until 2025	Project Manager's job description	Project Manager/ network members	05-12.2022
1.1.3. Detailed mapping of the food industry	Information is collected from producers and caterers in the county and about the possibilities they offer; the process starts with mapping the demand	Project Manager's job description	Project Manager/ network members	05-09.2022
1.1.4. Creating a common information platform	A dynamic information platform is in operation and provides up-to-date information on the supply and demand of local food in Tartu County	10 000 euros/ LEADER joint project; ARIB measures	Project Manager/ network members	05-09.2022
1.1.5. Administration of the information platform	The information platform is up to date, participants are responsible for submitting consistent and relevant information	Project Manager/ LEADER joint project; ARIB measures	Network members (Project Manager is in the role of an administrator)	Ongoing, from its launch

⁶ The action plan is specified annually. This is the responsibility of the food network Project Manager

⁷ Abbreviations: TAS – Tartu County Development Association; AMTC – The Association of Municipalities of Tartu County; LG – Local Government

Line of action 1.2: Regular information exchange, organisation of common events, seminars, training events, etc.

Activity	Expected result	Resources/ sources	Responsible party/ Participants	Time
1.2.1. Training of network members, organisation of think tanks, seminars, etc.	Regular events are organised for network members. Events are planned according to the actual needs of members (workshops, training programmes, brainstorming, study visits, company visits, etc.)	Organisation cost 10 000 euros per year/ LEADER joint project; ARIB measures	Organisers are network members; Project Manager provides support	From 05.2022/ once a month
1.2.2. Promoting cooperation with Southern Estonian organisations contributing to food industry development, and with networks operating across Estonia	Overview of Southern Estonian food industry resources and definition of collaboration areas; efficient collaboration with networks operating across Estonia	Project Manager's job description	Project Manager	2022
1.2.3. Exchange of expertise and best practices of public sector caterers in the procurement process ⁸	Public sector institutions are aware of and use the measures for bringing local healthy food to kindergartens, schools, and other public institutions as much as possible	Project Manager/ work group	Leaders are LGs; Project Manager helps with organisation	Once per quarter in 2022, later as needed
1.2.4. Study visits to other food regions	Network members are informed of the experience of other Estonian regions and countries in developing food regions	Organisation cost 10 000 euros per year/ LEADER joint project; ARIB measures	Project Manager/ network members	From 2022; one study trip per year

Line of action 1.3: Creation of new distribution channels and points of sale, further development of the existing ones

1.3.1. Further development of existing points of sale	Local food is visible and accessible at existing points of sale (existing markets and other points of sale)	Application rounds; LEADER measure for development of local food; other funds; LG budgets	Tartu County Development Association/ organisations operating in the food industry	2022-2025
1.3.2. Creation of new points of sale	Local and fresh food is accessible through points of sale in different regions of Tartu County and in the City of Tartu	Application rounds; LEADER measure for development of local food; other funds; LG budgets	Tartu County Development Association/ organisations operating in the food industry	2022-2025

⁸ Cooperation is also possible with URBACT external partners who engage in similar activities

SG 2

Tartu County food industry has a common and distinctive brand. Key representatives of the sector use the brand and it is well known across Estonia and internationally.

Line of action 2.1: Creation of Tartu County food industry brand, joint marketing efforts

Activity	Expected result	Resources/ sources	Responsible party/ Participants	Time
2.1.1. Creation of a common brand for Tartu County food network	The Tartu County food network has agreed on a common distinctive brand, which has been developed in cooperation with all food industry target groups	15 000 euros/ LEADER joint project; ARIB measures	Project Manager/ network members/ branding company selected through procurement	01-12.2023
2.1.2. Creation of a common marketing and communication strategy in accordance with the brand	Clearly defined value proposition; most of the key food industry organisations in Tartu have joined the brand	10 000 euros/ LEADER joint project; ARIB measures	Project Manager/ network members/ marketing partner selected through procurement	07-12.2023
2.1.3. Implementation of the marketing and communication strategy	The brand has become well-known across Estonia (by 2024) and has achieved international presence (by 2030)	Annual budget/ LEADER/ARIB measures/ Enterprise Estonia	Project Manager/ network members	2023+

Line of action 2.2: Working towards transforming the Tartu County food region into an Estonian and European food region

2.2.1. Pilot project for Tartu County recipes	A book has been published emphasising the importance of local produce and accentuating the region's unique character	URBACT, LEADER, ARIB	Project Manager/ network members	2023
2.2.2. Working towards transforming the Tartu County food region into an Estonian food region	In 2025, Tartu County is an Estonian food region	Project Manager	Project Manager/ network members	Preparatory activities 2024, Estonian food region in 2025
2.2.3. International cooperation with URBACT "Food Corridors" project partners, other LG partners	Implementation of international projects that help to introduce and develop local food scene	URBACT, LEADER	LGs, TAS, Project Manager	2022-2025
2.2.4. Working towards transforming the Tartu County food region into an European food region	In 2030, Tartu County is an European food region	Specified in 2023-2024	Project Manager/ network members	Preparatory activities from 2024

SG 3

Tartu County food industry employs innovative and science-based solutions that are ecologically friendly and place high value in local resources.

Line of action 3.1: Cooperation with research and development institutions to improve innovation capabilities in the food industry

Activity	Expected result	Resources/sources	Responsible party/Participants	Time
3.1.1. Launching Tartu County innovation programme for food producers and suppliers in cooperation with research and development institutions	The sector's innovation capability has increased; all target groups of the food network have participated in the innovation programme; new development projects have been initiated	TAS new period strategy measure	TAS	2023-2027
3.1.2. Highlighting and introducing the fact that food products from Tartu County are science-based	The fact that food products from Tartu County are science-based and innovative is made public	Implementation of the pilot project/LEADER measure/ARIB measures	TAS, Project Manager/network members	2023-2025
3.1.3. Activities related to promoting organic products from Tartu County	The number of organic producers has increased in Tartu County	Specified in 2022-2023	TAS, Project Manager/network members	2023-2027

Line of action 3.2: Implementation of innovative projects, including development of products, services, packages, logistics, etc.

3.2.1. Support for innovative projects initiated by businesses and organisations from Tartu County	Businesses and other organisations have carried out product development projects highlighting the value of local food, resulting in new products and services and increased revenue	Application rounds; LEADER measure for development of local food/ ARIB measures	TAS/ organisations operating in the food industry	2022-2025
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SG 4

People in Tartu County are conscious consumers of healthy local food; food waste and carbon footprint in the sector have reduced.

Line of action 4.1: Shaping consumption habits and attitudes; organising competitions, campaigns etc. to value local and healthy food

Activity	Expected result	Resources/ sources	Responsible party/ Participants	Time
4.1.1. Collection and wider introduction of best practices in educational institutions, extending different previously launched/ completed pilot projects across the county	Extending successful pilot projects across the county	Different programmes, LGs	LGs, food network participants, Project Manager	2022-2025
4.1.2. Further development of the Green Festivals concept to promote conscious consumption, broader introduction of the Green Festival methodology and concept	(Food) events held in Tartu County promote the consumption of local produce and food, as well as sustainable consumption. The methodology of Green Festivals has been introduced at international level	Different programmes, LEADER	TAS, Project Manager, food network participants, Tartu County event organisers	2022-2024
4.1.3. Implementing projects on decreasing food waste and circular economy	The generation of food waste in Tartu County has decreased	Various programmes, LEADER	Participants of the food network, TAS, Project Manager	2022+

Line of action 4.2: Involving supermarket chains in introducing food from Tartu County

4.2.1. Marketing local food through retail businesses	Local food is accessible, clearly distinguishable and easy to find in larger retail business in Tartu County	LEADER joint project; ARIB measures	Project Manager/ network members	Pilot project 2023-2024
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Possible sources of funding

Implementation of the food strategy involves a number of financing measures, including various national as well as EU measures.

Possible sources of funding are as follows:

- Network members, including public sector (local governments), private sector and third sector partners.
- LEADER measures for the period of 2023-2027 (primarily measures implemented by Tartu County Development Association to support the development of local food industry).
- Other measures supporting rural development, including the programme “Agriculture, Food and Rural Life 2022-2025”, different ARIB measures for the period of 2021-2027.
- International cooperation measures, including:
 - Estonian-Latvian programme;
 - Central Baltic Programme;
 - URBACT IV programme;
 - Horizon 2020 programme.
- Different measures of the European Regional Development Fund for the development of entrepreneurship, cooperation, etc.
- Various Social Fund measures for human resources development.

3.2. Small Scale Action: organising the Green Festival

In the spring-autumn period of 2021, Tartu County Development Association organised the **Green Festival pilot programme**⁹ under the URBACT international collaboration “Food Corridors” project as a Small Scale Action. The Green Festival concept was created in accordance with the Culture Capital Tartu 2024 strategy of environmental activities, the Tartu 2024 environmentally friendly events guidelines based on this strategy and Tartu Nature House environmentally friendly events guidelines.

Green Festival logo:



⁹ See also <https://www.tas.ee/arendustegevus/rohefestival/>

During the pilot programme, we provided support services to event organisers in Tartu County, helping them to make their events 'greener'. The services included:

- Training programmes introducing the requirements, recommendations and procedures for organising the Green Festival (environmentally friendly event).
- Mentoring support for event organisers in planning and implementing green initiatives for their events.
- Study visits to learn from the experience of other event organisers (Viljandi Folk, I Land Sound, etc.).
- Introducing and marketing the events in traditional and social media.

The Green Festival pilot programme included 9 events in Tartu County, 7 of which took place in 2021:

1. Discover the River Emajõgi river trips (Emajõgi, 6 trips, from 1 July to mid-August)
2. Inland Waters Festival (Lake Peipus, Lake Võrtsjärv, Emajõgi, 7-16 July)
3. Car-Free Avenue (Tartu, 9 July-8 August)
4. Widget Factory Festival (Tartu, 26-29 August)
5. Maarjalaat 2021 Fair (Tartu, 11 September)
6. Tartu Student Days: Autumn 2021 (Tartu, 20-26 September)
7. Tartu City Marathon (Tartu, 2 October)
8. Estonian Movement and Sports Festival (Elva, summer 2022)
9. Road to Delicious Food (Kastre parish, summer 2022)

Tangible results of the training programmes and mentoring carried out in spring included implementing the **green plans of Tartu County events** during the organisation process. Five previously agreed environmental care principles were followed at each event:

- Drinking water was provided free of charge at the event.
- Reusable dishes were used.
- People were invited to come on foot, by bike, or to use public transport or ridesharing.
- Waste was collected separately.
- **The menu included local, fresh and clean food sourced from Tartu County, as well as vegetarian food.**

In summary, during all these events the organisers used targeted waste management, followed the reusability principle with materials and purchases, provided free drinking water, etc. Most of the organisers of the events also followed the sustainability principle in arranging transportation logistics, and they came up with different solutions for sustainable use of energy (e.g., handwashing stations with timers) etc.

We can say that the Small Scale Action was successful. In the coming years, we are planning to continue these activities (see Action Plan p 4.1.2).

Experience from the Small Scale Action and follow-up plan

In February 2022, the Green Festival pilot programme lead group meeting was held, and pilot programme participants and organisers defined targets for 2022. The discussions were concluded with the decision that a Green Festival training programme with new events will be organised in Tartu County in 2022. As part of the programme, Tartu County event organisers will be provided support services to make their events greener. Event organisers who participated in last year's pilot programme will also be involved in 2022 as Green Festival mentors. Particular focus is placed on conducting a training session for 2022 Green Festival training programme participants on gathering data and setting indicators. We are planning to collaborate with European Culture Capital Tartu 2024 under the Green Festival training programme in 2022 as well as in the following years. In 2023-2024, Tartu County Development Association together with its partners will implement Tartu 2024 South Estonian Community Programme, through which the Green Festival format will be expanded to the Southern Estonia region.

The Green Festival pilot programme lead group also highlighted the importance of communication – event organisers with prior Green Festival organisation experience will have a great opportunity to share inspiration and know-how with inexperienced organisers or people interested in green topics in general.



River Emajõgi river trips participated in Green Festival pilot programme.
Photo: Sander Silm



Car-Free Avenue in Tartu City. Photo: Maanus Kullamaa

3.3. Communication

A more detailed marketing and communication plan will be developed in 2023 once the common food brand for the county has been created. Until then, information will be shared through Tartu County Development Association's **website and information channels** (e.g., mailing list). Creating a separate social media page (e.g., Facebook page) for the Tartu County food network would also be helpful.

After the recruitment of a food network coordinator (presumably in May 2022), a special public announcement will be made (e.g., a press release), introducing the goals and action plan of the food network.

Before developing a marketing and communication strategy, it would be sensible to focus our attention on informing the key target groups of the newly created food network, and the goals and action plans of the food strategy. The key target groups, possible messages to them and channels have been listed in the table below.

Target group or stakeholder	Possible message	Channel(s)
Tartu County food industry entrepreneurs, and public and third sector organisations involved in the food industry (current and potential food network members, including producers, caterers, event organisers, local governments)	We have created a new Tartu County food network, which it is open for everyone involved in the food industry <ul style="list-style-type: none"> • It helps to bring together the producers, caterers and consumers in the county, generating new trade opportunities and helping to find cooperation partners • It supports cooperation and knowledge transfer among the network members through shared development projects, events, information exchange, etc • The food network helps to bring together entrepreneurs and R&D institutions with the aim of creating innovative products and services • It promotes the consumption of local food and produce among private individuals as well as public and private sector institutions 	Website Social media E-mail
Inhabitants of Tartu County	We have created a food network for Tartu County, which values local produce and cooperation among its partners <ul style="list-style-type: none"> • The Tartu County food network creates a common platform for producers, caterers, R&D institutions, public sector, event organisers and other organisations involved in the food industry • The purpose of the food network is to help bring local and clean food onto the table of people living in Tartu County and those studying in its educational institutions • Tartu County is working towards becoming Estonian food region by 2025, and European food region by 2030 	Newspaper <i>Tartu Postimees</i>
Estonian residents	Tartu County food industry is working towards becoming well-known across Europe by 2030 <ul style="list-style-type: none"> • The Tartu County food network creates a common platform for producers, caterers, R&D institutions, public sector, event organisers and other organisations involved in the food industry • Tartu County food industry's unique strength is its research and development capacity and versatility, spanning across large and small producers, caterers, universities and other food sector participants • Tartu County food network is not only seeking to become well-known across Estonia, but is also targeting the status of a European food region 	ERR



Making Ivan chai. Photo: Ahto Sooru

3.4. Risk analysis

The implementation of Tartu County food strategy may be influenced by various external and internal environmental risks. External risks have been analysed according to the PEST analysis principle, meaning that risks are classified into political, economic, socio-cultural and technological factors. Internal risks include environmental risks, which can be controlled and prevented by the collaboration network.

The probability of risks has been assessed on a three-point scale – low, medium and high; impact has been assessed on a four-point scale – weak, medium, high and very high (causing activities to stop).

RISKS FROM EXTERNAL ENVIRONMENT

Description of the risk	Probability	Impact	Preventive steps	Corrective steps
Political factors				
Changes in the EU and national legislation affecting the food industry	Medium	High	Constant awareness of industry policies; providing input for the action plans of ministries, local governments and policymakers	Making adjustments to the strategy and action plan when necessary
Economic factors				
More successful activity by other food networks	Medium	High	Creating a strategy and action plan that is well-considered, targeted and considers the background and unique nature of Tartu County	Adjusting the strategy as needed, consistent monitoring and updating of the action plan
Cheaper price of imported products causes suppliers and consumers to prefer the cheaper option	High	Very high	Consistent awareness raising among all key target groups	More efficient explanation of the benefits of local food, allocation of additional resources to raise awareness in cooperation with all partners
General economic downturn, which discourages cooperation between network members and reduces consumers' interest in local food	Medium	Medium	Flexibility in developing the strategy and action plan	Making adjustments to the strategy as needed, e.g., creating new initiatives
Socio-cultural factors				
Insufficient cohesion of Tartu County as a collaboration and co-creation region, leading to preference of alternative collaboration regions (e.g., Southern Estonia)	Medium	Medium	Special attention is given to adopting a county-level approach, and to creating a common collaboration platform	Implementing additional activities in order to strengthen commonality and shared goals
Technological factors				
Food innovation and new technologies develop fast, the county's development in these aspects lags behind	Low	Medium	Involving research and development institutions in the network, placing value on innovation in the strategy	Allocating additional resources to support innovation in the sector

RISKS FROM INTERNAL ENVIRONMENT

Description of the risk	Probability	Impact	Preventive steps	Corrective steps
A distinct leader does not emerge for the network, implementation of the action plan does not go as planned in terms of speed and volume	Low	Very high	Planning resources to find a Project Manager for the network immediately after the completion of the strategy	If necessary, additional negotiations with partners and sponsors to secure resources needed for coordination
The network leader fails to engage network members and launch activities as planned	Medium	High	Organising a carefully planned and thorough competition to find a motivated and competent leader	Supporting the leader by the network lead group; allocating additional resources to support coordination activities; if necessary, reacting quickly and finding a new leader
Little interest and motivation expressed by network members to contribute to joint activities	Medium	Very high	Comprehensive inclusion and provision of information in the context of the strategy process; introduction of the food strategy to different target groups	If necessary, organisation of additional informative events, explaining the benefits of collaboration, etc
Failure to raise sufficient funds to implement the strategy	Medium	Very high	Preliminary work with potential sponsors/ measures; stressing the need also in other development documents	Continuous monitoring of financing possibilities, finding new sources, cooperation with international and domestic donors
Planned activities fail to generate the desired results, the popularity of local food does not increase	Medium	High	Joint discussions and reflections on the action plan and priorities, ensuring that first steps are clearly agreed upon	Flexible approach in implementing the action plan; if necessary, creating new initiatives/postponing or discarding some planned activities

3.5. Strategy management model and monitoring

Even though steps described in the action plan can serve as a basis for planning activities, the general leadership direction of the food network should follow the so-called platform-based collaboration model. Under this model there should be a continuous exchange of ideas, leading to changes in the action plan as the external environment changes, knowledge is acquired, and interests and ideas are expressed. The aim of this approach is to create the so-called learning organisation model, where **the parties involved** (caterers, retail businesses, LGs) **can take the initiative in leading a line of activity or action plan item**. Such a collaboration-based leadership model is necessary, as it helps to ensure that each network member is motivated to participate in and contribute to carrying out the activities. The **Project Manager's** task is to ensure that the network's activities are well coordinated.

The collaboration network is informal and open, and its members include parties involved in the strategy process, including:

- Small producers, farmers
- Food industry companies
- Caterers
- Tourism and food networks
- Event organisers
- Local governments of Tartu County
- Educational and research establishments
- Support structures and umbrella organisations
- Representatives of retail chains

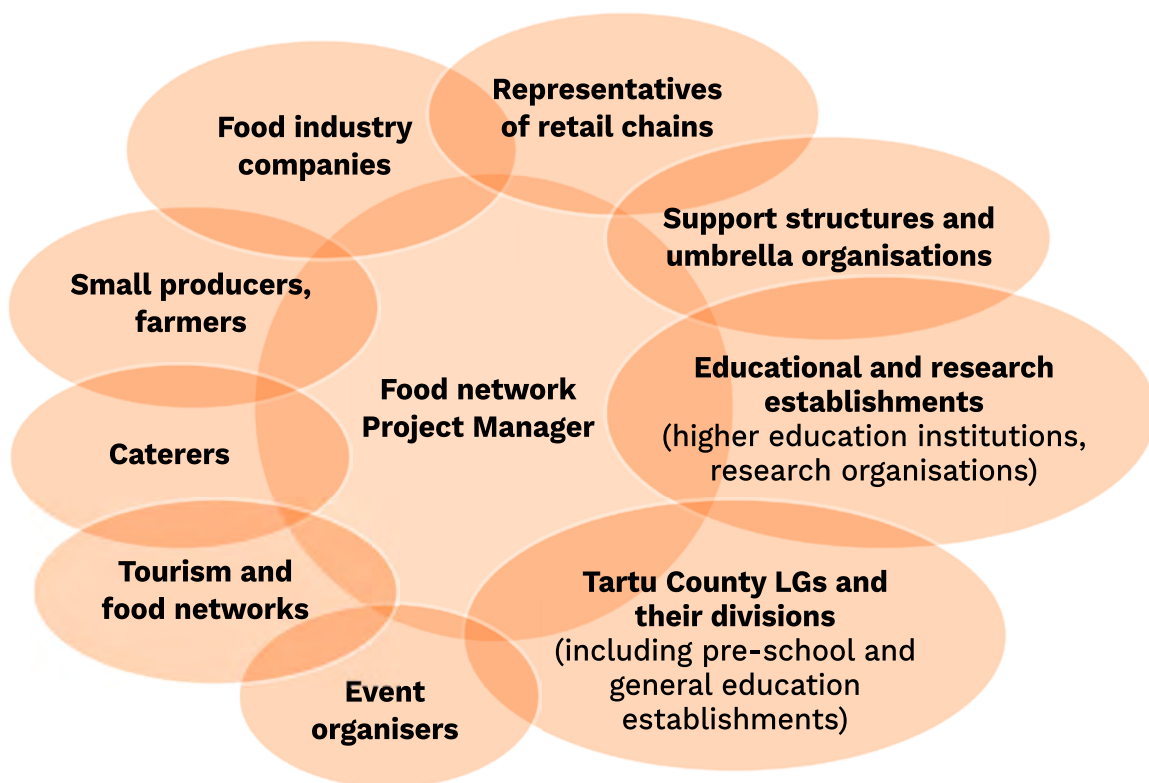


Figure 2. The parties of Tartu County food network

The strategy (primarily the action plan) is updated **at least once a year** (autumn period), when goals and completed activities are reviewed and next year's action plan is devised. The food network Project Manager leads the updating process of the action plan. According to the plan, the Project Manager starts to work in May 2022 under the Tartu County Development Association.

The strategy is monitored at three levels:

1) **Action plan level** – reviewed annually following a three-tier system (completed, in process, not started); corrections are made based on monitoring results.

2) **Evaluation of the effectiveness and functioning of the network:**

- **Number of network participants** (target: 100 active members by 2025; source: Project Manager).
- **Participation of different target groups:** small producers, large processors, etc. (target: at least half of the network members are entrepreneurs (small producers, major producers, caterers, etc., source: Project Manager).
- **Number of new initiatives** by network members (target: 5 new initiatives per year, led by network members).
- **Satisfaction level of network members** (target: is specified after first survey; source: annual survey of network members).

3) **Impact level:**

- **Public awareness of the food network** (target: widely known across Estonia by 2025, source: survey).
- **Proportion of local produce used by Tartu County catering establishments** (target for 2025: local (Estonian) food constitutes more than 50% of food provided by Tartu County caterers; source: survey).
- **Consumer awareness** (target: people living in Tartu County are well informed of local food and healthy eating; source: survey).



Coop Tartu shopping basket with Estonian products



Järveotsa Quail Farm at the fair of Tartu Lõunakeskus. Photo: Lembit Liivamägi

Summary

The topic of local food is gaining popularity in Estonia, much like in the rest of Europe. Various food networks have been formed, farm shops and markets are growing in number, regional trademarks have been developed, local events are being organised to highlight the regional variations of food, etc. Food production – and entrepreneurship in the food industry in a broader sense – is also traditionally an important economic sector in Estonia. The sector employs tens of thousands of people and is a significant export earner.

Although there are over 10 active food networks in Estonia, the second largest county – **Tartu County** – is yet to form its own collaboration network, which would involve **different food industry interest groups**. The present food strategy is designed to fill this void by creating a common platform for food industry participants to harness as much of the region's potential and character as possible.

The food strategy covers Tartu County with a population of nearly 154 000 people, which constitutes about 11.5% of the Estonian population. One of the most important preconditions for the joint development of the Tartu County food industry is **a sufficiently large local market and diversity in the food scene** (incl. businesses, events, networks, etc.) **and favourable natural preconditions**. What lends the Tartu County food network a unique character is its **research and development potential** derived from universities and development organisations operating in the field. Tartu County also stands out from other similar networks thanks to the **broad-based and versatile** nature of its participants, featuring larger and smaller producers, caterers from urban and rural regions, public sector institutions (including universities), event organisers, etc.

According to a vision created for 2030 as part of the food strategy, **Tartu County is a well-known food region in Estonia and Europe**.

To implement this vision, four goals have been established:

1. **Efficient exchange of information and knowledge among producers, caterers and consumers;** local food is easily available for everyone.
2. **Tartu County food industry has a common and clearly identifiable brand.** Key representatives of the sector use the brand and it is well known across Estonia and internationally.
3. Tartu County **food industry employs innovative and science-based solutions** that are ecologically friendly and place high value in local resources.
4. People in Tartu County **are conscious consumers of healthy and local food;** food waste and carbon footprint in the sector have decreased.

To implement the goals, activities have been planned for the period of 2022-2025, and a Project Manager will be hired to coordinate these activities. To ensure the successful launch of the network, it is important to create a collaboration model that allows continuous information exchange among network members, as well as continuous launching of new initiatives by members, with the participation of all key target groups.

VISIOONISEMINAR SÕNAPILV



SEMINARIL VÄLJAPAKUTUD TEGEVUSIDEED

(mida võiks toidustrateegia fookuste raames kohe ära teha?)

1) Tootjate ja tarbijate parem kokkuviiimine

- Veebiplatvorm (asukohapõhine – lähedal asuvad tootjad, pakkujad esitletud)
- Koordinaator (organisatsioon)
- KOVid viivad tootjad ja tarbijad kokku
- Iseteenindav pood (automaatne)
- Väiketootjate koolitamine
- Väiketootjate koondumine ühele müügipinnale – koostöö
- Facebook'i grupp toidutootjate, -pakkujate kokkuviiimiseks (nt nagu grupp Juurikas)
- Tootja viib töökollektiivile
- Kogukonna „mahediilerid“
- Suurettevõtete kaasamine
- Pakendite QR-koodid (tooraine päritolu)
- Degusteerimise päevadel Tartumaa rõhutamine
- Erinevateks tänukinkideks kohaliku tooraine kinkimine
- Kinkekaardid Tartumaa toidutootjate toodetele (koostöö ettevõtete vahel)
- Tootearenduse töötoad tarbijatele (tagasiside tootjatele)
- Omavalitsuste poolt soodustada OTT poodide rajamist
- Kvaliteetfestivalid – toidulaadad jms (olemasolevate hulgas „reha“ teha)

2) Ühise/maakondliku brändi loomine

- Kaardistada toidutootjad ja tarbijad (toitlustusettevõtted)
- Piirkonna ulatus ebaselge (brändi ulatus)
- Maitsev Tartu – edasi arendada – Maitsev Tartumaa
- Igapäevane eestvedamine
- Oluline on eristuda teistest brändidest
- Bränd näitab toidu päritolu
- Põhjalik teavitustöö (PR, koolitamine)
- Tartumaa sertifikaat – ühildada riiklike toidusertifikaatidega (Eesti toit)
- Brändi taga peab olema ka sisu – jätkusuutlikkus
- Bränd üle Lõuna-Eesti?
- Tarnekindlus
- Usaldusväarsus, läbipaistvus
- Toiduseiklus – tarbijatele pakkuda hasarti ja kindlustada Tartumaal liikumine – nt templite kogumine
- Tartu – heade mõtete JA toidu linn!
- Eesmärk: kui inimene mõtleb heast toidust/Eesti maitsetest, siis mõtleb ta Tartumaast

3) Tootearendus ja innovatsioon

- Järjepidevalt tootjatele võimalusi tutvustada (uued süsteemid jms) – tootja-teadlane
- Vaadata üle takistused seadusandluses
- Lõhkuda arvamusi, et innovatsioon on kallis
- Kaardistada vajadusi (milliseid lisandväärtusi turg vajab) ja kitsaskohti
- Keskkonnasõbralikud pakendid – atraktiivsem tarbijale
- Innovatsioon toitlustuses
- Läbi toitlustuse ja arenduste tarbijate koolitamine (info pakenditele)
- Koostöö teadusasutuse, ettevõtja ja avaliku sektori vahel (olemas EMÜ)
- Tartu maakonna tootjate pakend
- Tootearendus peaks keskkonnasäästlik olema
- Tartu Ülikool – globaalne liider plastivaba pakendi väljatöötamises (topsiringi näide); jääkidest uued pakendid
- Tutvustada toodete päritolu ja köögipoolt otsustajatele
- Pakendivaba pood
- Kogemuste jagamine (kuidas tegijad on kitsaskohti lahendanud)
- Muutustega kohanemiseks lapsevanemate ja õpetajate kaasamine
- Tervis – Tartumaal elad 10 aastat kauem
- Kala on tervislik, Tartumaal Peipsi kala
- Toidu innovatsiooniprogramm

4) Teadlikkuse tõstmine

- Läbi laste teadlikkuse tõstmine (õpitoad, talude külastused, lastega kokkamine) – PRIA, KIK
- Kokkade koolitamine, tunnustamine
- Lapsevanemate teadlikkus
- Hanked (muuta riigihangete seadust)
- Toitlustusasutuste kaudu
- Toidu tootjad
- Meedia toel info jagamine (videod)
- Mahetoodete tarbimise toetamine, et suurendada nõudlust
- Tartumaa toiduinfo ühest allikast (kodulehe loomine vms)
- Lihtsustada toiduainete pärinemise kontrolli (toiduahela jälgitavus, nt QR-kood)
- Tartumaa toidukultuuri tutvustuse päevad – tarbijate koondamine Tartumaale
- Tarbijate kaasamine
- Kui hanget ei tee, siis eelista kohalikku
- Tipptasemel teadus, tervist toetavad valikud, uuringud, kommunikeerimine
- Koostöö
- Eeskaju, parimate näidete väljatoomine, lugude rääkimine, luua positiivsed narratiivid
- Et tekiks vähem jäätmeid, jätkusuutlikkus, toidu päästmine
- Nügijad (suunamudijad)
- #tartumaatoit
- Tootmise külastus (malev, avatud talude päev)
- Teadvustada aastaaegu ja hooajalist menüüd + traditsioonid (mida on millal söödud ja miks)
- Kõrghooegade tähistamine, nagu näiteks spargel Saksamaal (kartuliaeg, tomatiaeg, õunaaeg, seeneaeg jne)



Study Day in Tartu County Hiie Farm on the topic of growing organic apple trees.
Photo: Elen Peetsmann

5) Hullud ideed

- Tartumaa Euroopa toidupiirkond
- Maksu suurendamine väljastpoolt Tartumaad tulevale toorainele
- Piiramatu lasteaia ja koolitoidu rahastus (toit on kohalik)
- Kohaliku toidu Wolt
- Tartumaa kohaliku toidu börs (veebis)
- Madalam käibemaks kohalikule toidule
- Avaliku sektori toitlustajad kasutavad kohalikku toorainet
- Metsamari – mahe
- Igale tartlasele oma talunik
- Igal lapsel oma peenar
- Toidupakkujal oma aed
- Mahelammas jõuab kooli ja lasteaia toitlustusse
- Tartumaa toidupiirkonna rakendus (pildiga tuvastatav tooraine päritolu jms) – äpp, QR-kood
- Kohaliku toidu droon, toidukapid
- Funktsionaalse toidu restoran
- Vertikaalne sisepõllumajandus
- Päris toit on Tartumaalt
- Igasse kooli ja lasteaeda oma köök
- Kokandusring – toidu säilitamise viisid
- Kooliaed
- Hamburgeriputkad ära keelata Tartumaal
- Taldrikul toit raadiuses 10 km
- Hooajalist võõrtööjõudu juurde vaja
- Hooajalist kohalikku tööjõudu juurde vaja
- Robotid põllule
- Ühine logistika
- Uus restoran, kus kasutatakse ainult Tartumaa tooraineid
- Tartumaa päris oma roog – Tartumaa rahvustoit

VISIOONISEMINARIL (9.09.2021) OSALEJED

- Annika Jalak, SA Tartu 2024
- Dana Noormets, SA Tartumaa Turism
- Eddy Märtin, Luunja Vallavalitsus
- Elke Lillemets, Oksa Marjamaa talu OÜ
- Elo Mets, Tartu Ärinõuandla
- Evelin Anja, SA Eesti Maaelumuuseumid
- Evelyn von Moller, Võnnu Mahetalu
- Gea Järvela, SA Luke Mõis
- Helen Kalberg, Tartu Linnavalitsus
- Heneli Lamp, Selver AS
- Indrek Tulp, Eesti Teadusagentuur
- Ingrid Hunt, Tartu Teaduspark
- Jaan Sõrra, Tartumaa Põllumeste Liit
- Jaan Urb, OÜ Cumulus Consulting
- Joel Ostrat, Gustav Cafe OÜ
- Justin Hein, BioCC OÜ
- Kadri Kalle, Acento OÜ
- Kadri Leetsaar, Tartu Vallavalitsus
- Kaire Krevald, Tartu Tarbijate Kooperatiiv TÜ
- Kadri Püü, Tartumaa Arendusselts
- Kaisa Timmi, Tartumaa Arendusselts
- Kersti Aro, Eesti Maaülikool
- Krista Loog, SA Elva Teenused
- Kristiina Tammets, Tartumaa Arendusselts
- Kristo Raud, Salvest AS
- Külli Kell, Majandus- ja Kommunikatsiooniministeerium
- Lea Saul, Tartumaa Omavalitsuste Liit
- Lembit Liivamägi, Järveotsa Vutifarm OÜ
- Linda Suurmets, Tartumaa Arendusselts
- Marko Gorban, Maaeluministeerium
- Marilin Eessalu, Eesti Roheline Liikumine
- Marleen Viidul, Tartu Linnavalitsus
- Mart Keerutaja, Kastre Vallavalitsus
- Meeri Maastik, Põllumajandusuuringute Keskus
- Merle Vall, TÜ Taluturg
- Piibe Koemets, Peipsiääre Vallavalitsus

- Priit Allas, Tartu Raatuse Kool
- Priit Värvi, Tartumaa Arendusselts
- Rando Värnik, Eesti Maaülikool
- Sirle Sõstra-Oru, Tartu Linnavalitsus
- Tõnu Oks, Oksa Marjamaa talu OÜ
- Triin Pikk, SA Tartu 2024
- Triinu Akkermann, Peipsi Kogukonnaköök MTÜ
- Urmas Klaas, Tartu Linnavalitsus
- Viivika Padar, AS Tartu Turg
- Ülle Prommik, Tartu Linnavalitsus

TEGEVUSKAVA FOKUSGRUPPIDES OSALEJAD

Tegevuskava fookusgrupp 1:

tootjate, toitlustajate ja tarbijate kokkuviiimine (20.10.2021):

- Elen Peetsmann, Eesti Maaülikooli Mahekeskus
- Indrek Keres, OÜ Pokaveski
- Jaan Sõrra, Tartumaa Põllumeeste Liit
- Kadi Ploom, MTÜ Peipsimaa Turism
- Kadri Kalle, Acento OÜ
- Kadri Leetsaar, Tartu Vallavalitsus
- Kadri Püü, Tartumaa Arendusselts
- Kaire Krevald, Tartu Tarbijate Kooperatiiv TÜ
- Krista Loog, SA Elva Teenused
- Kristiina Tammets, Tartumaa Arendusselts
- Külliki Holtsmann, Maaeluministerium
- Lea Saul, Tartumaa Omavalitsuste Liit
- Lembit Liivamägi, Järveotsa Vutifarm OÜ
- Marilin Kroon, Tartu Linnavalitsus
- Merle Vall, TÜ Taluturg
- Mihkel Laan, OÜ Cumulus Consulting
- Moonika Einaste, SA Elva Kultuur ja Sport
- Rene Kiis, AS Tartu Turg
- Ülle Prommik, Tartu Linnavalitsus

Tegevuskava fookusgrupp 2:

Tartumaa toiduvaldkonna ühine bränd ja turundus (20.10.2021):

- Annemari Polikarpus, OÜ Viinamardi Talu
- Annika Ojasaar, SA Tartumaa Turism
- Erika Pääbus, OÜ Andre Farm
- Gaili Kangur, SA Luke Mõis

- Gea Järvela, SA Luke Mõis
- Heneli Lamp, AS Selver
- Jaan Sõrra, Tartumaa Põllumeste Liit
- Kadri Leetsaar, Tartu Vallavalitsus
- Kadri Püü, Tartumaa Arendusselts
- Kaire Krevald, Tartu Tarbijate Kooperatiiv TÜ
- Kersti Aro, Eesti Maaülikool
- Kristiina Tammets, Tartumaa Arendusselts
- Liis Lainemäe, MTÜ Sibulatee
- Mart Keerutaja, Kastre Vallavalitsus
- Mihkel Laan, OÜ Cumulus Consulting
- Sven Tobreluts, Tartumaa Omavalitsuste Liit
- Viivika Padar, AS Tartu Turg
- Ülle Prommik, Tartu Linnavalitsus

Tegevuskava fookusgrupp 3:

tootearendus ja innovatsioon (27.10.2021):

- Epp Songisepp, BioCC OÜ
- Gaili Kangur, SA Luke Mõis
- Joel Ostrat, Gustav Cafe OÜ
- Justin Hein, BioCC OÜ
- Kadi Ploom, MTÜ Peipsimaa Turism
- Kadri Püü, Tartumaa Arendusselts
- Kaisa Timmi, Tartumaa Arendusselts
- Kersti Aro, Eesti Maaülikool
- Kertu Vuks, Elva Vallavalitsus/ Lõuna-Eesti Turismiklaster
- Kristiina Tammets, Tartumaa Arendusselts
- Kätrin Karu-Lavits, Teeklubi MTÜ
- Mihkel Laan, OÜ Cumulus Consulting
- Ülle Prommik, Tartu Linnavalitsus

Tegevuskava fookusgrupp 4:

teadlikkuse kasvatamine (27.10.2021):

- Evelin Anja, Eesti Põllumajandusmuuseum
- Heneli Lamp, Selver AS
- Jaan Sõrra, Tartumaa Põllumeeste Liit
- Janeli Meristo, Tartu Linnavalitsus
- Kadri Leetsaar, Tartu Vallavalitsus
- Kadri Püü, Tartumaa Arendusselts
- Kaire Krevald, Tartu Tarbijate Kooperatiiv TÜ

- Kaisa Timmi, Tartumaa Arendusselts
- Kristiina Tammets, Tartumaa Arendusselts
- Külli Kell, Majandus- ja Kommunikatsiooniministeerium
- Liis Lainemäe, MTÜ Sibulatee
- Liisa-Lota Kaivo, MTÜ Emajõe Lodjaselts
- Mihkel Laan, OÜ Cumulus Consulting
- Paula Luks, Eesti Põllumajandusmuuseum
- Viivika Padar, AS Tartu Turg
- Ülle Prommik, Tartu Linnavalitsus

TAUSTAUURINGU FOOKUSGRUPPIDES OSALEJAD

Teadus- ja arendusorganisatsioonide fookusgrupp (14.04.2021):

- Lea Saul, Tartumaa Omavalitsuse Liit
- Ingrid Hunt, Tartu Teaduspark
- Juta Kuhlberg, Tartu Loomemajanduskeskus
- Elo Mets, Tartu Ärinõuandla
- Andre Veskioja, Eesti Taimekasvatuse Instituut
- Mihkel Zilmer, Tartu Ülikool
- Sven Tobreluts, Tartumaa Omavalitsuste Liit
- Kersti Aro, Eesti Maaülikool
- Marilin Kroon, Tartu Linnavalitus

Kohalike omavalitsuste fookusgrupp (22.04.2021):

- Kadri Leetsaar, Tartu Vallavalitsus, hankespetsialist
- Väino Kivirüüt, Peipsiääre vald, abivallavanem
- Krista Loog, SA Elva Teenused, juhataja
- Triin Pikk, SA Tartu 2024

Turismi- ja toiduvõrgustike fookusgrupp (22.04.2021):

- Kertu Vuks, Elva vald
- Merle Vall, Lõunakeskuse Taluturg
- Rene Kiis, AS Tartu Turg
- Liis Lainemäe, MTÜ Sibulatee
- Helen Kalberg, Tartu linn
- Gea Järvela, SA Vapramäe-Vellavere-Vitipalu
- Külli Kell

Toiduainete tootjate fookusgrupp (13.05.2021):

- Raivo Külasepp, AS Grüne Fee Eesti
- Elke Lillemets, OÜ Marjamaa Talu
- Madis Ajaots, OÜ Rannu Seeme
- Indrek Keres, OÜ Pokaveski

Toiduainete töötlejate fookusgrupp (13.05.2021):

- Annemari Polikarpus, OÜ Viinamärdi Talu
- Erika Pääbus, OÜ Andre Juustufarm
- Külli Must, OÜ Alatskivi Mõisamaitset
- Martin Rohtmets, AS Rõngu Mahl

Toitlustajate fookusgrupp (21.05.2021):

- Eneli Kaasik, Juulamõisa kohapärimuskohvik
- Sven Särki, Alatskivi lossi restoran ja sviidid
- Martin Sõgel, Pepe's Bistro and Social Club

Toidusündmuste korraldajate fookusgrupp (21.05.2021):

- Ruta Rannu, Karlova Teater/Emajõe Suveteater, Karlova kohvikute päev
- Kadi Ploom, Peipsi Järvefestival, Sisevete Festival
- Herling Mesi, Varnja kalalaat

Lisaks osalesid kõigis fookusgruppides Kristiina Tammets (Tartumaa Arendusselts) ja Mihkel Laan, (OÜ Cumulus Consulting).

PERSONAALINTERVJUDES OSALEJAD:

- Merle Vall, Lõunakeskuse Taluturg (15.04.2021)
- Ülle Jukk, Jõgevamaa toiduvõrgustik (16.04.2021)
- Ingrid Hunt, Tartu Teaduspark (20.04.2021)
- Kristo Raud, AS Salvest (02.06.2021)

Appendix 3.

Background study of the Tartu County food industry

Appendix 4.

Food strategy roadmap



Onions and onion beds in Lake Peipus region. Photos: NGO Onion Route



Onion Route in summer. Photo: NGO Onion Route