



Added value – the key to increased export sales

Case of Finnish oats

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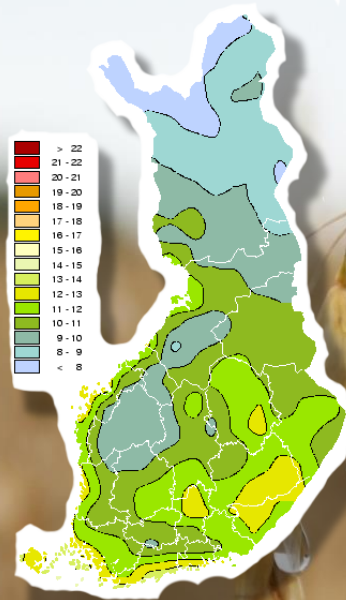
Grain Forum, December 7, 2021, Tallinn, Estonia

The Finnish climate is ideal for oats

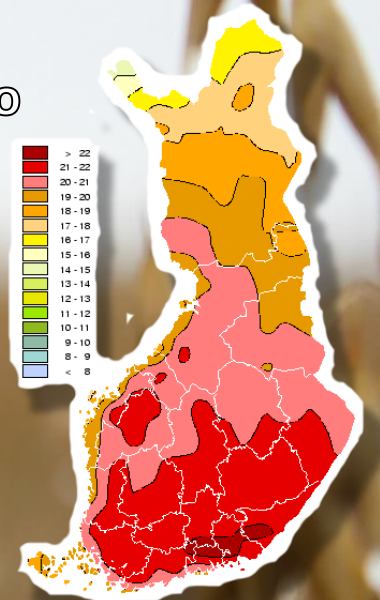
Harsh winters

Cool summers

July average*
between 8-20 C°



minimums

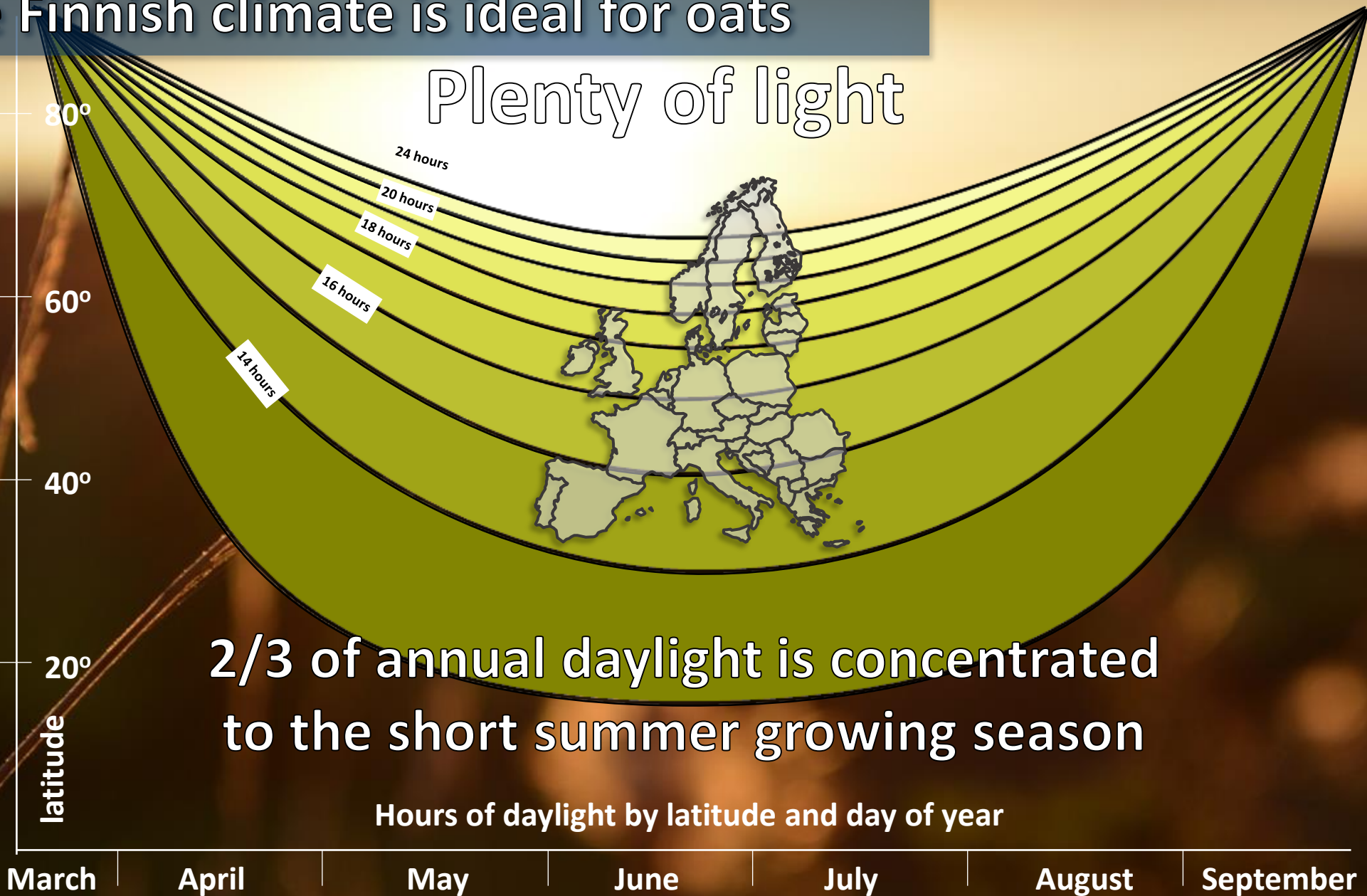


maximums

Adequate amount of precipitation

The Finnish climate is ideal for oats

Plenty of light



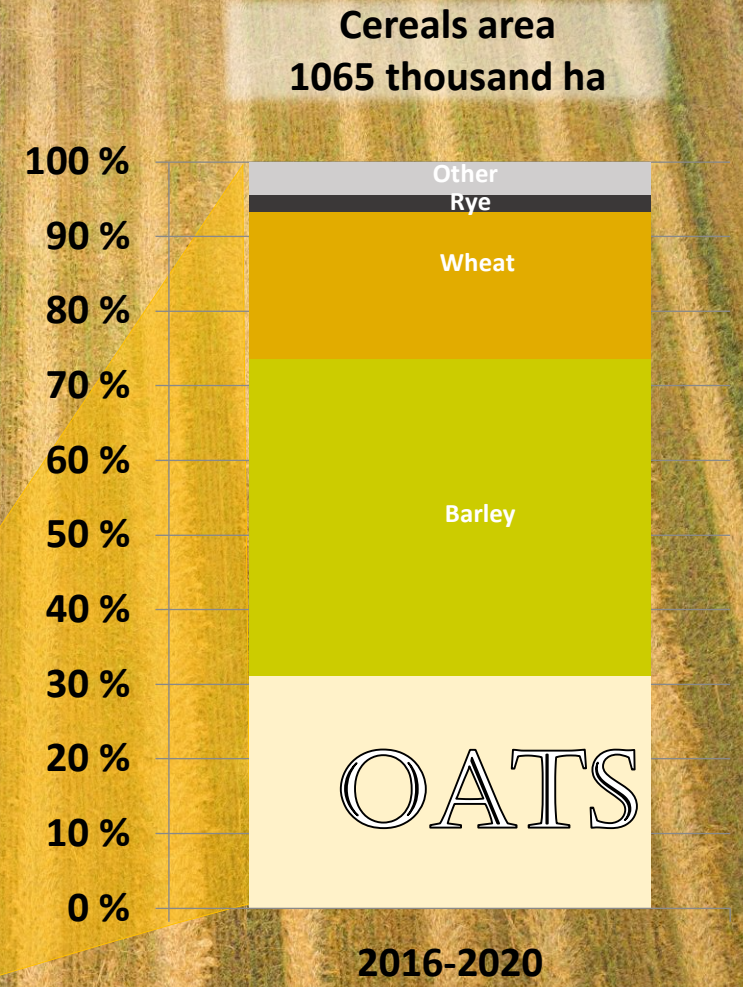
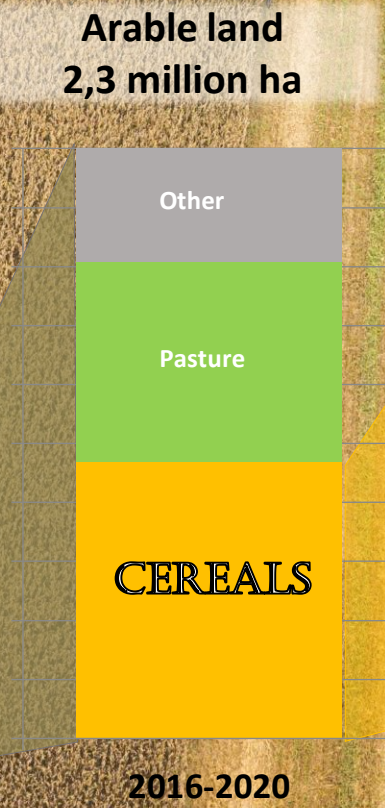
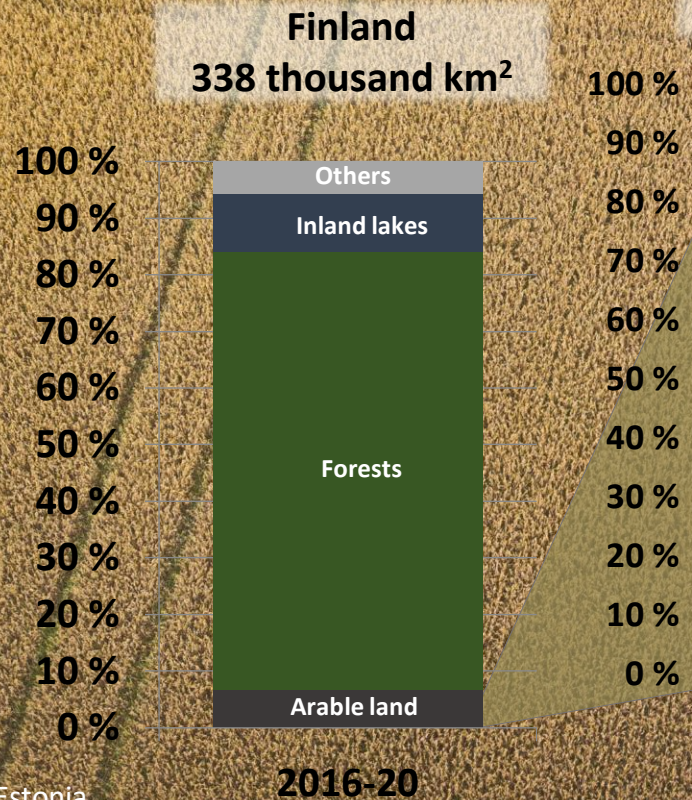
2/3 of annual daylight is concentrated to the short summer growing season

Hours of daylight by latitude and day of year

March April May June July August September

Oats is one of the main crops in Finland

Oats area:
31% of cereal area,
15 % of arable land



Oats is one of the main crops in Finland

| | | |
|----------------------|--------------|------------------------|
| Harvested area | 299.000 ha | Organic share 10,3% |
| Yield | 3,34 t/ha | |
| Production | 995.000 tons | 6,5% |
| Export share of oats | 34% | |
| Export volume | 341.000 tons | |

Statistics are calculated as an average of the last five growing seasons.

Finnish oats - Best quality

Hectoliter weight

Over 52 kg

Over 58 kg

Share in production

88%

30%

Light color

Thin hull, excellent mill process yield

Application for Protected Geographic Indication, PGI

Top research and innovation

10 M€
research
investment

20
Patent
families

40
years
research
track

VTT (Technical Research
Centre of Finland) Oat
research

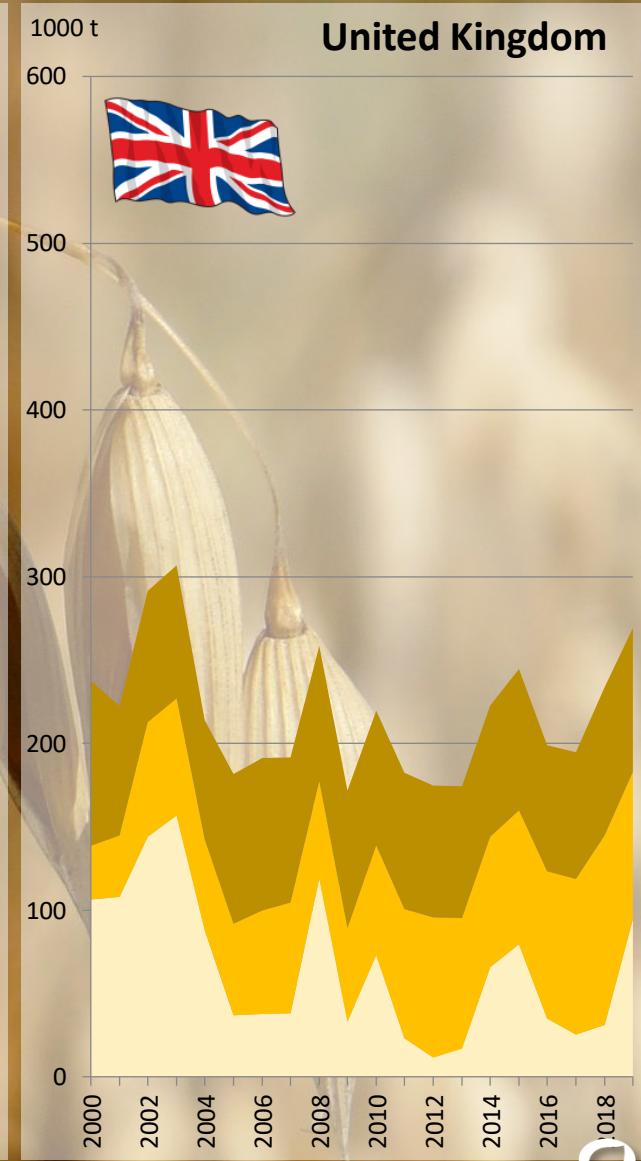
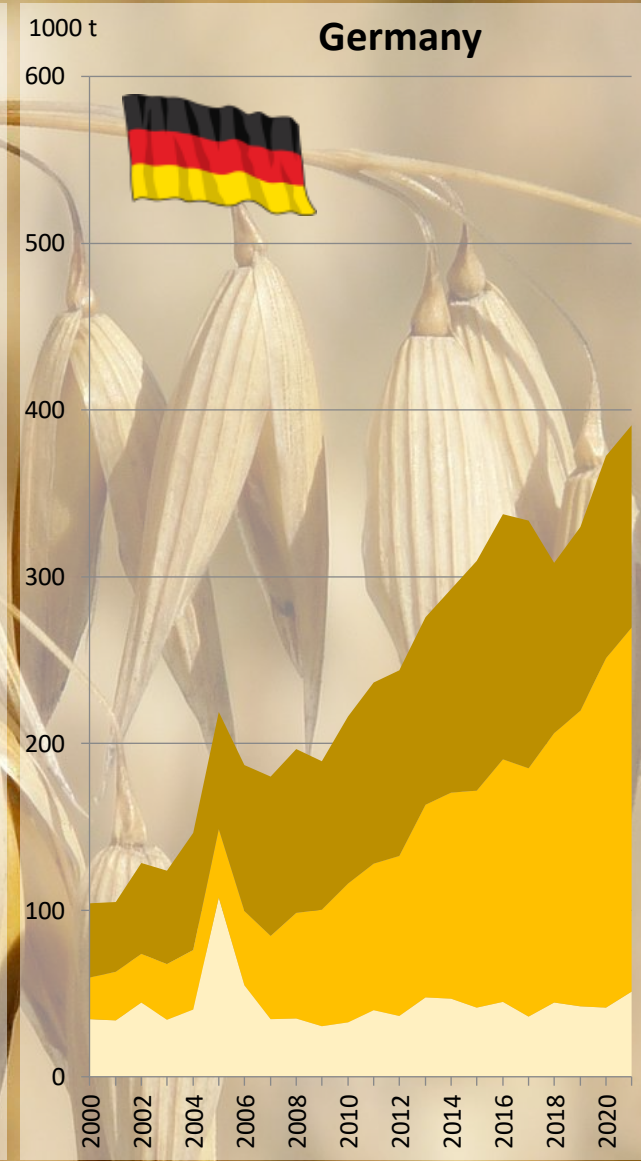
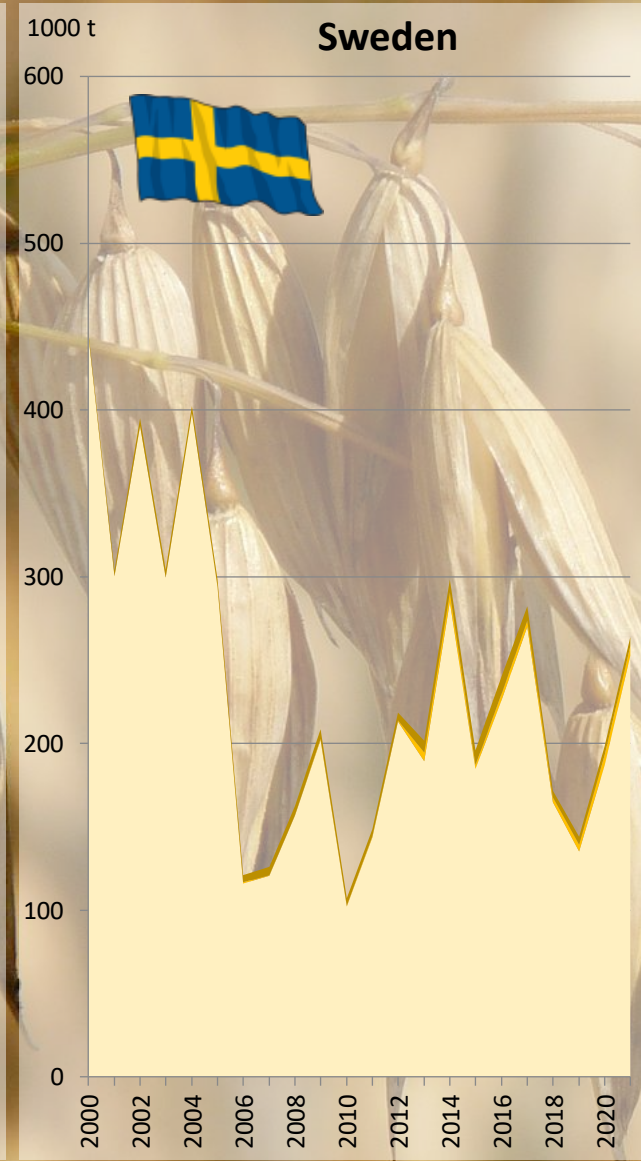
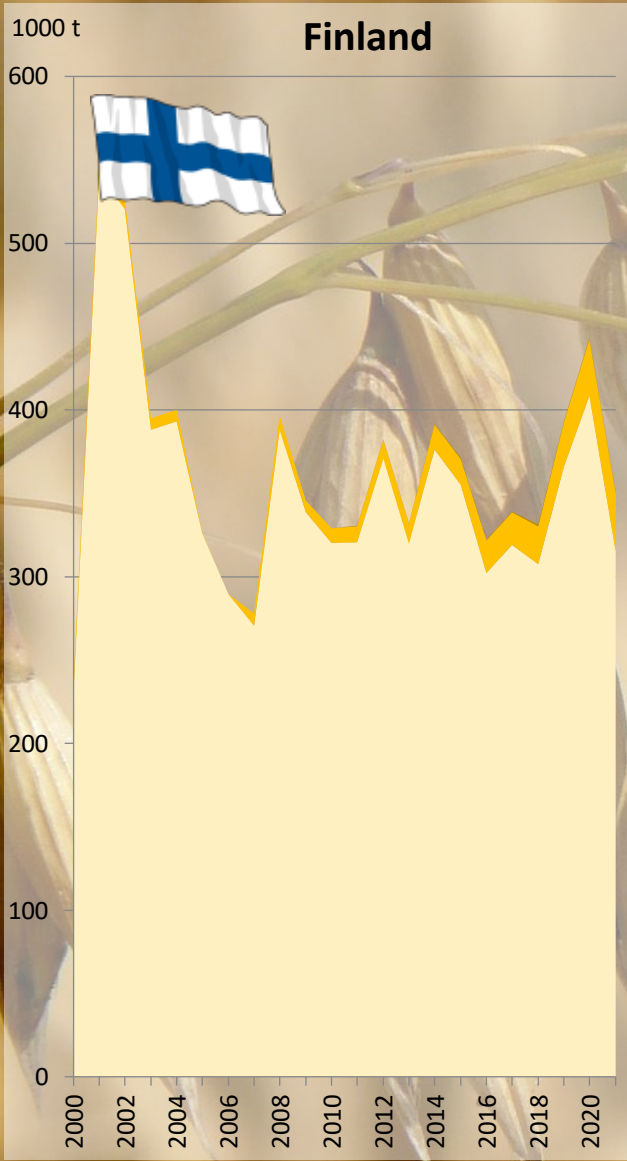
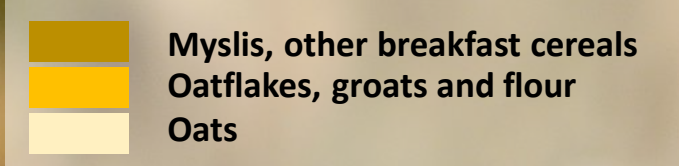
Finnish
academic
research

Over **300**
scientific
articles on
oats since
2000

2 M€
research
"OatHow"
2019-21

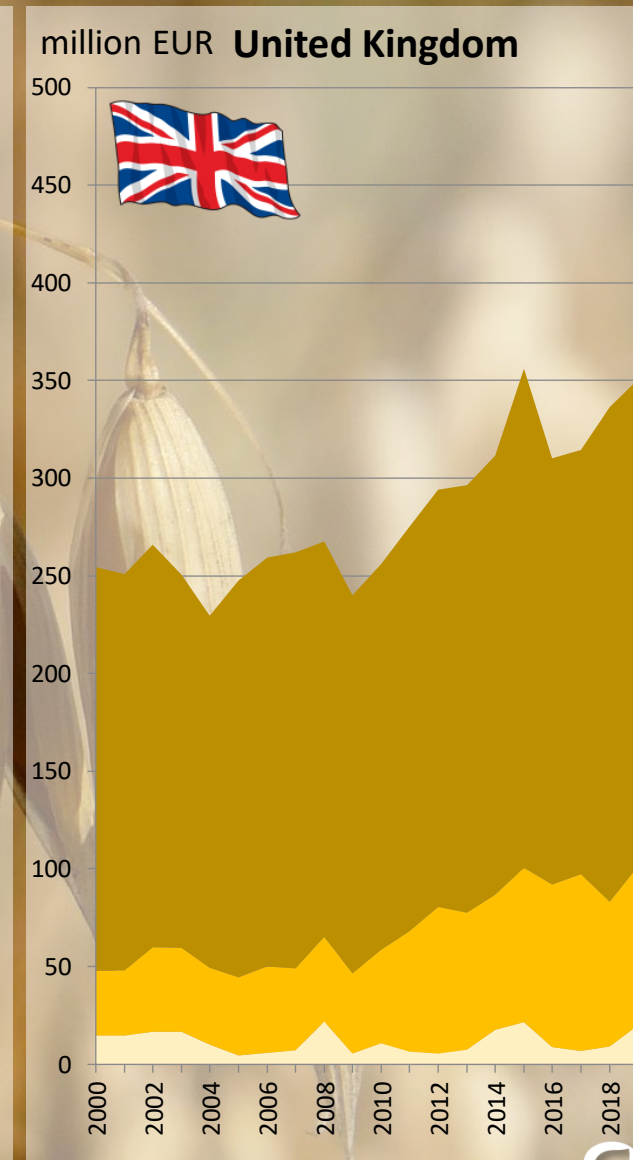
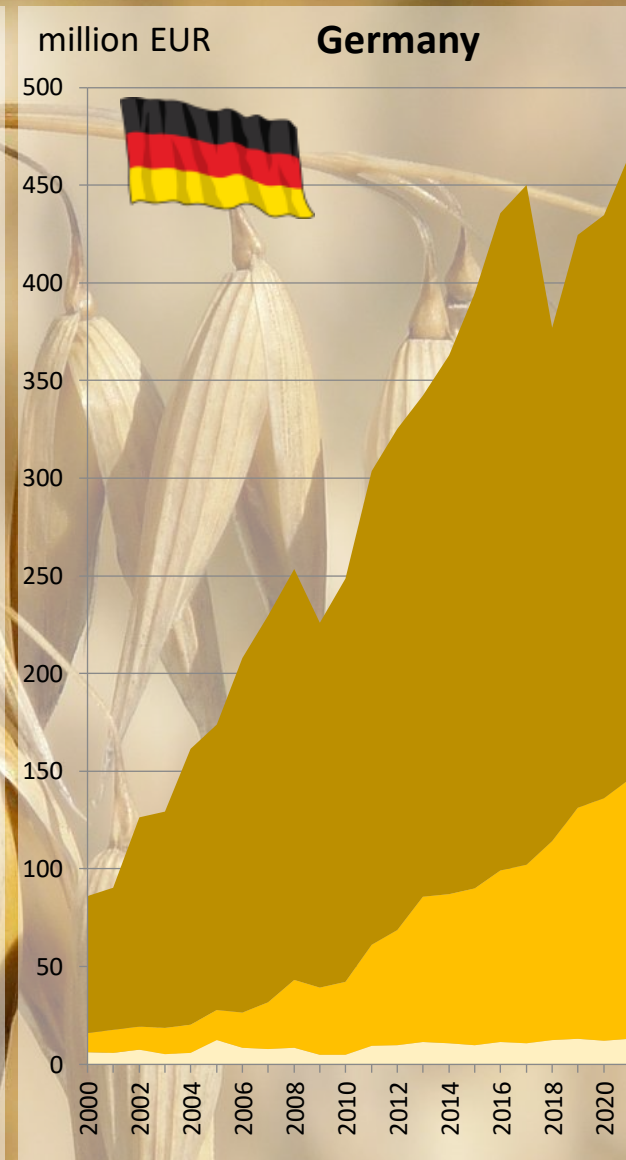
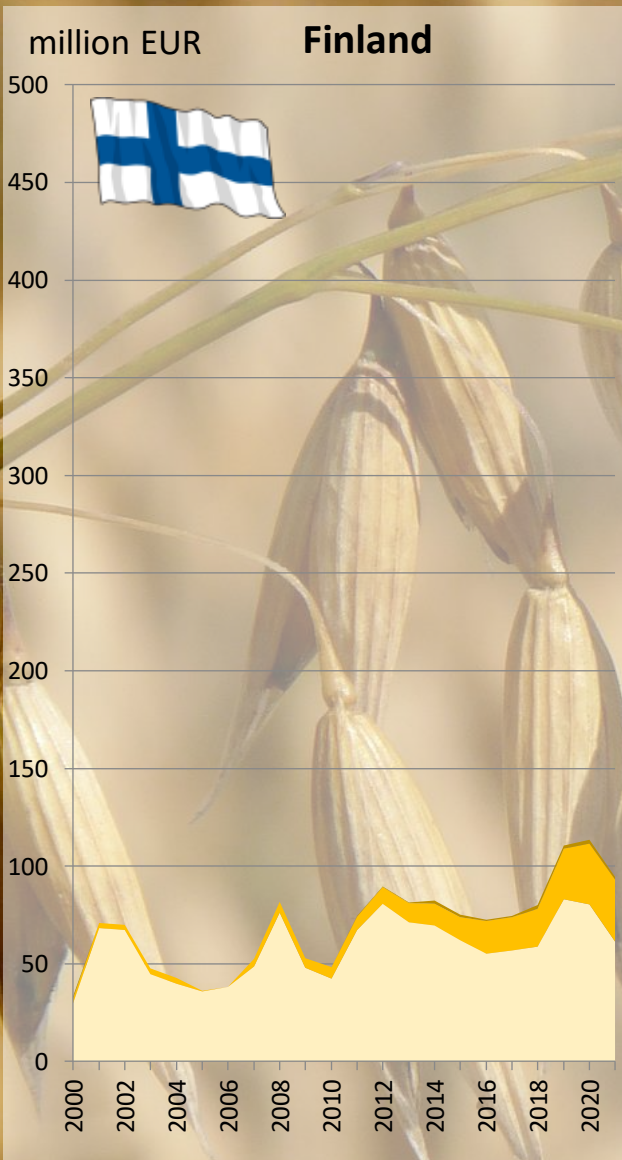
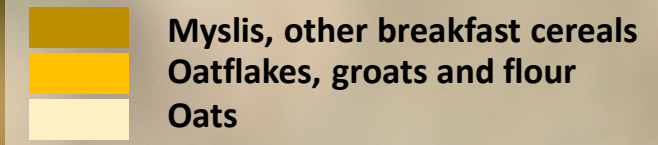
New
national
research
programme
on oats

Export volumes of oats and oat products

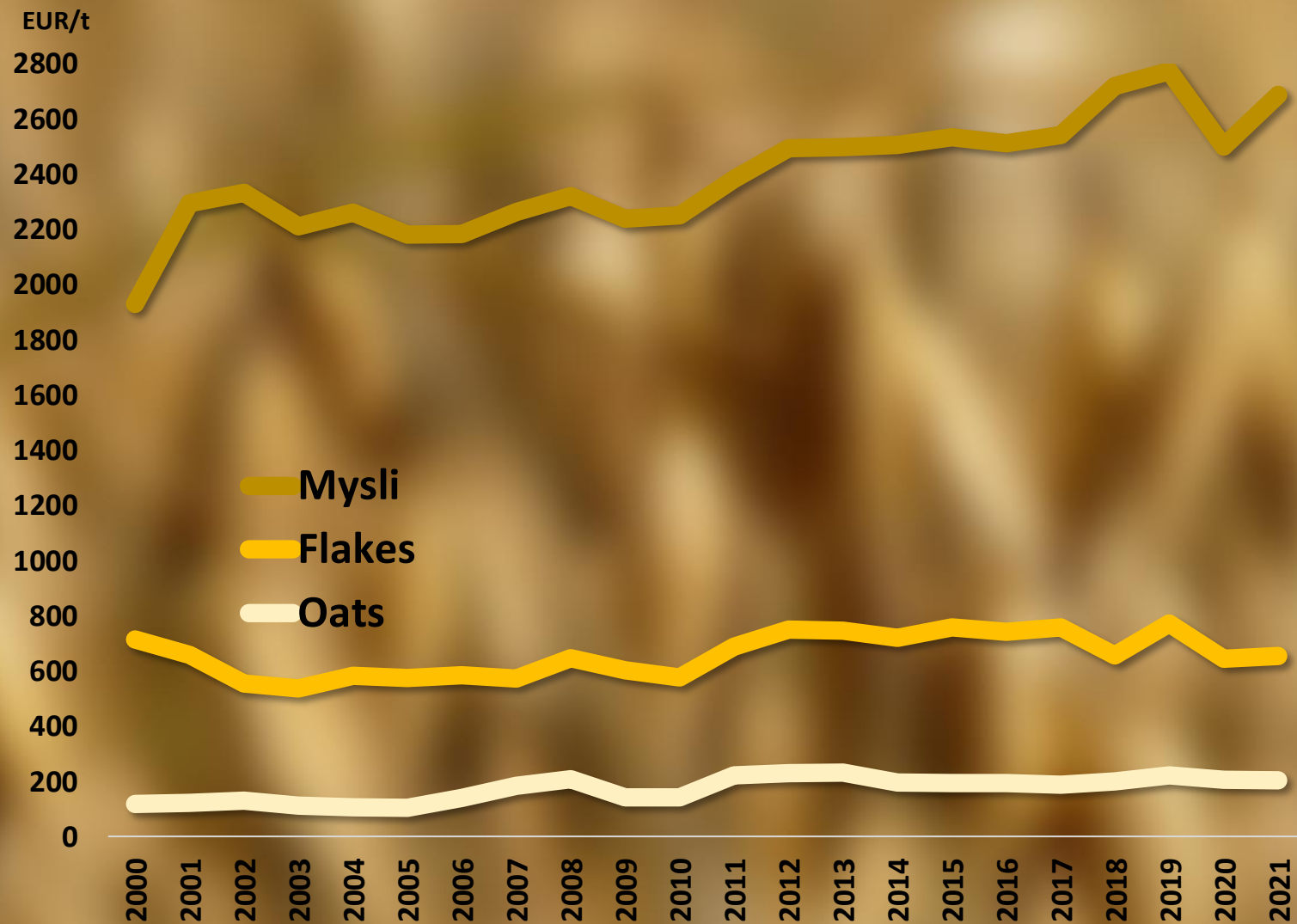


Source: own calculations based on Eurostat Comext dataset

Export value of oats and oat products

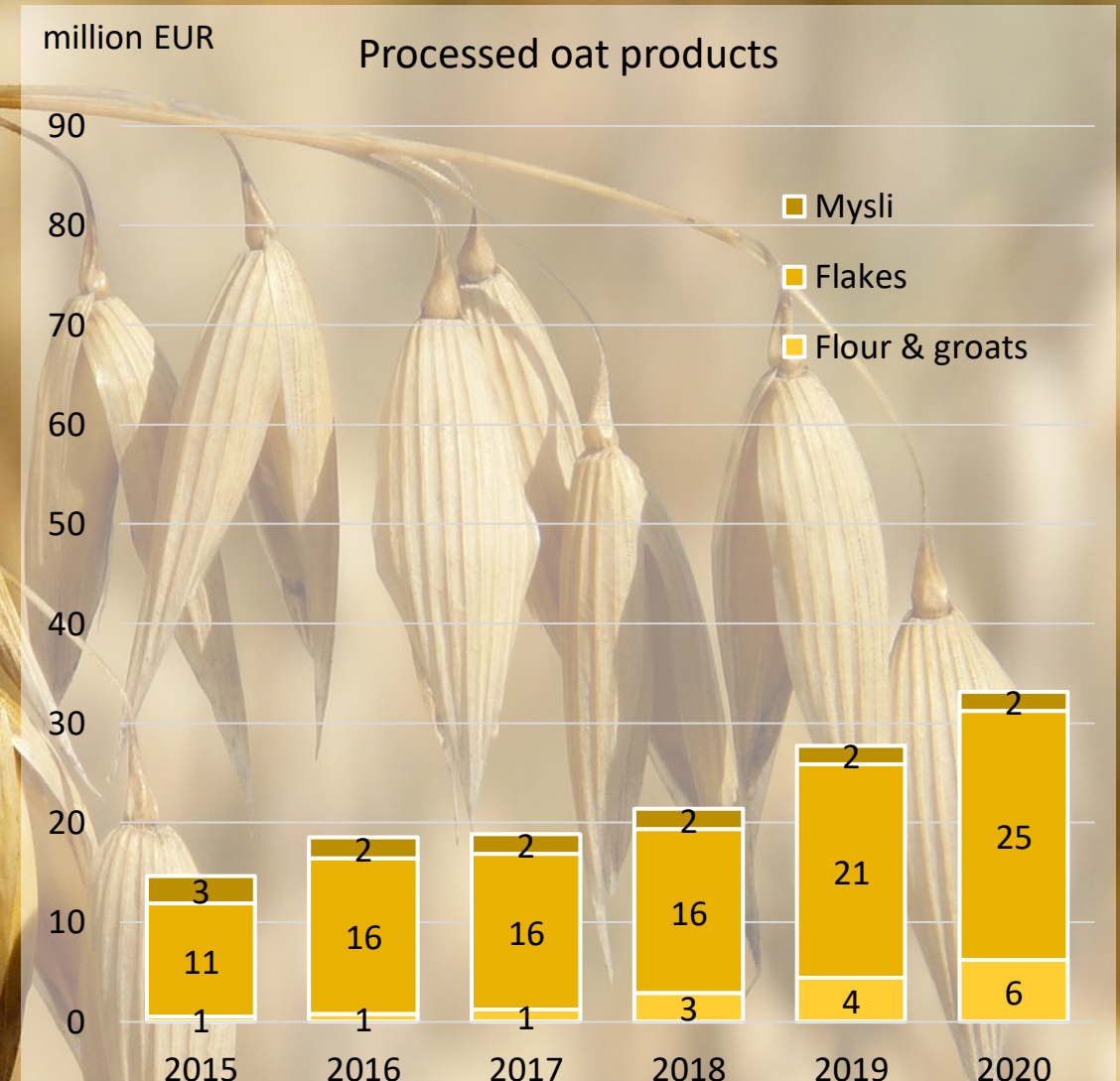
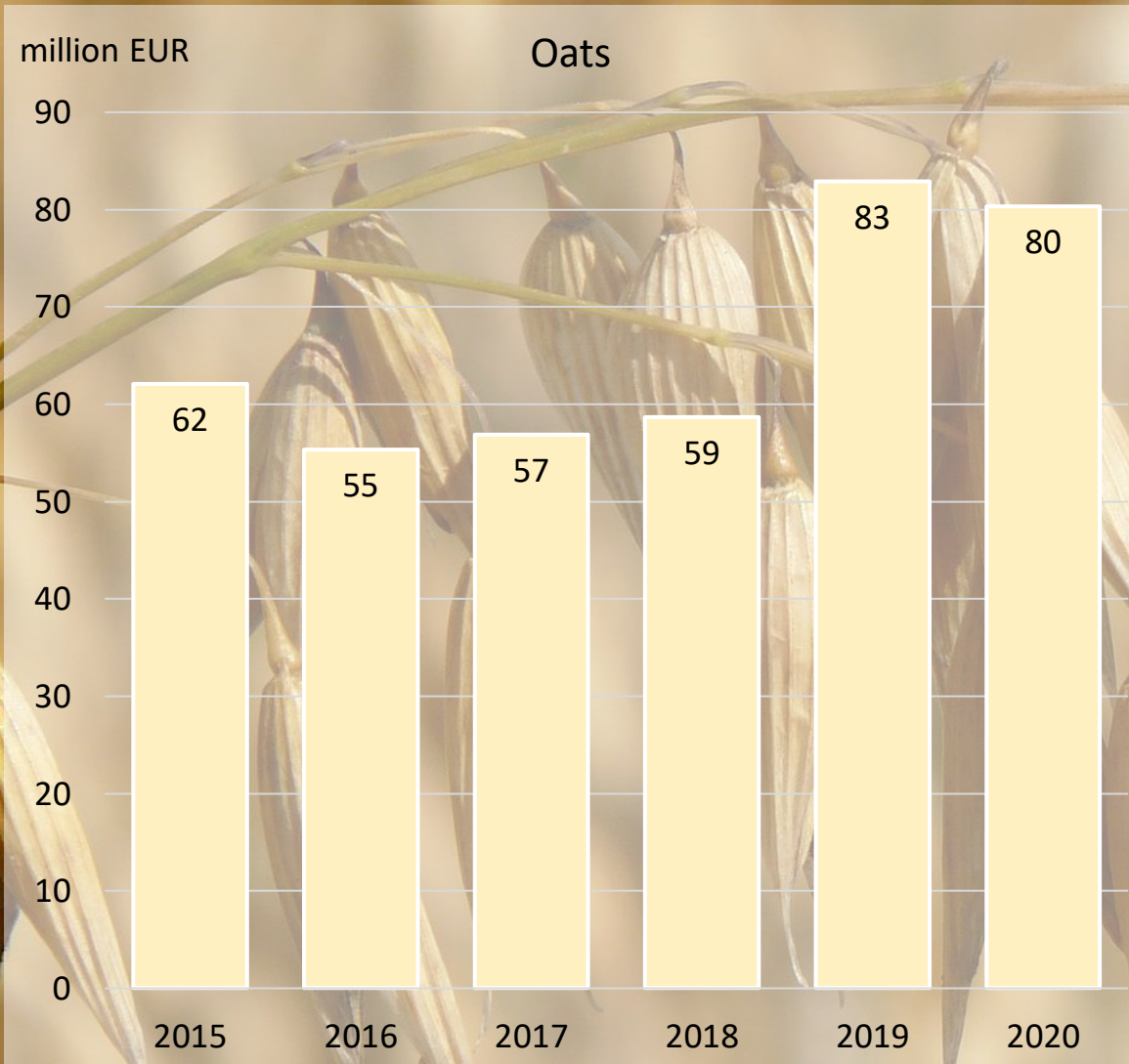


Unit prices of oats and oat products



Source: own calculations based on Eurostat Comext dataset. Calculated as average of four countries, FI, SE, DE, UK.

Export value of oats vs oat products of Finland



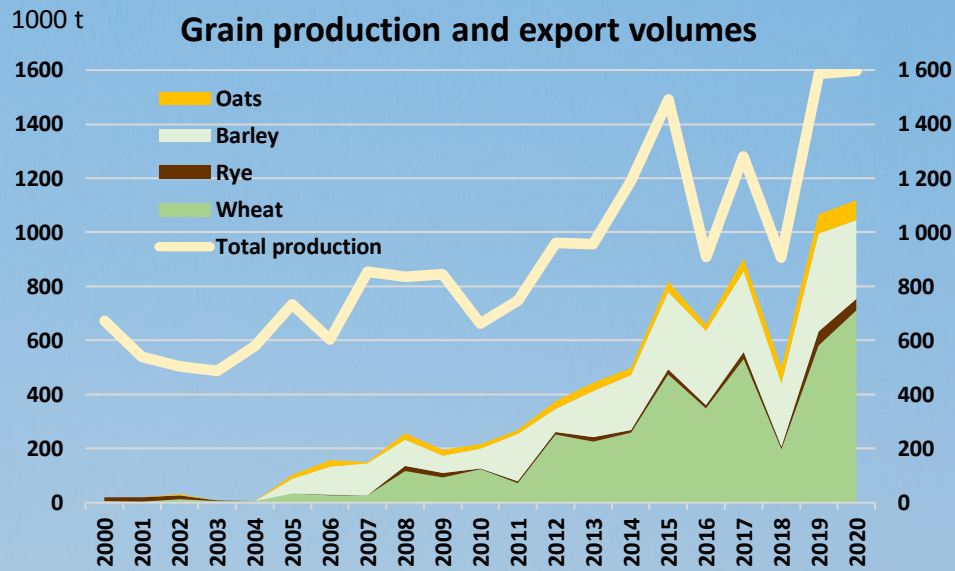
Source: Finnish Customs



What can be learnt from the case of Finnish oats for the

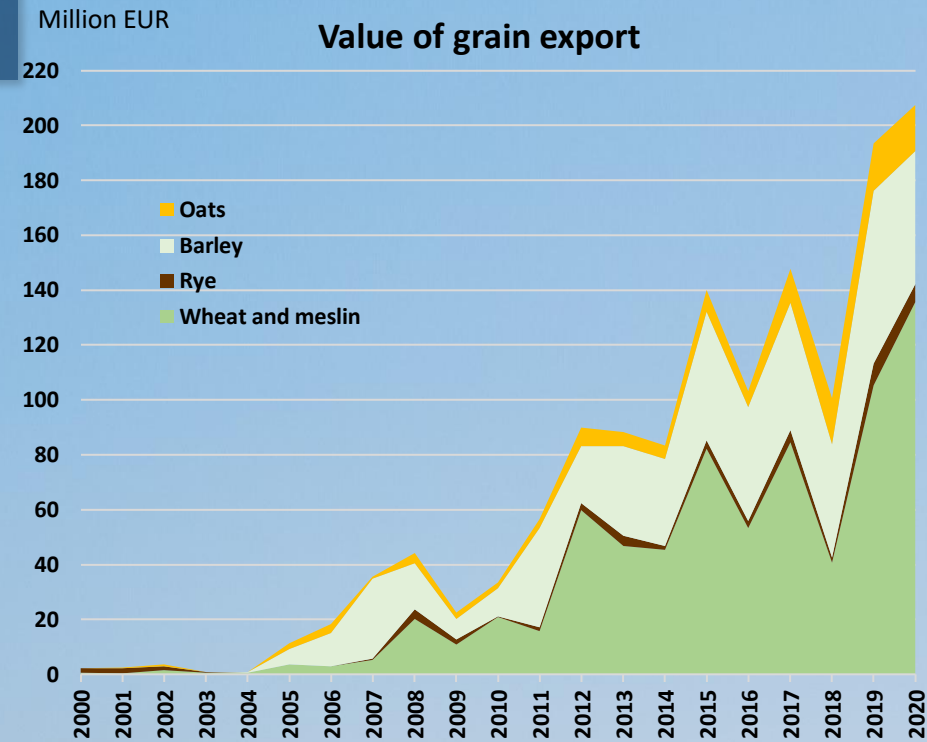
Estonian crop sector?

Estonian grain exports

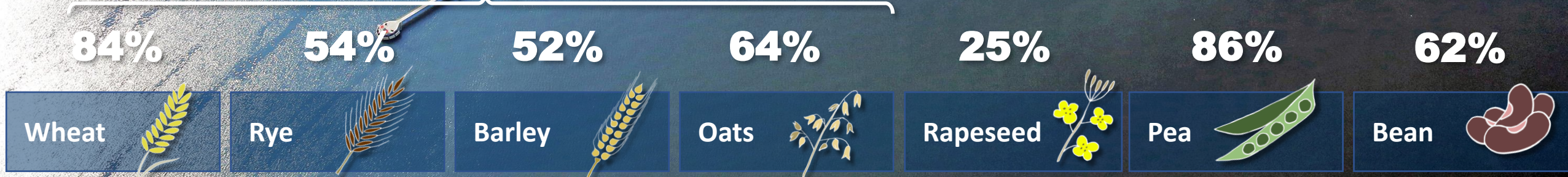


Domestic use of grains has been 450-500.000 tons on a 5-10 year average.

Above that the growth in production has been exported as raw material.



Grain, oilseed and protein crop exports from Estonia

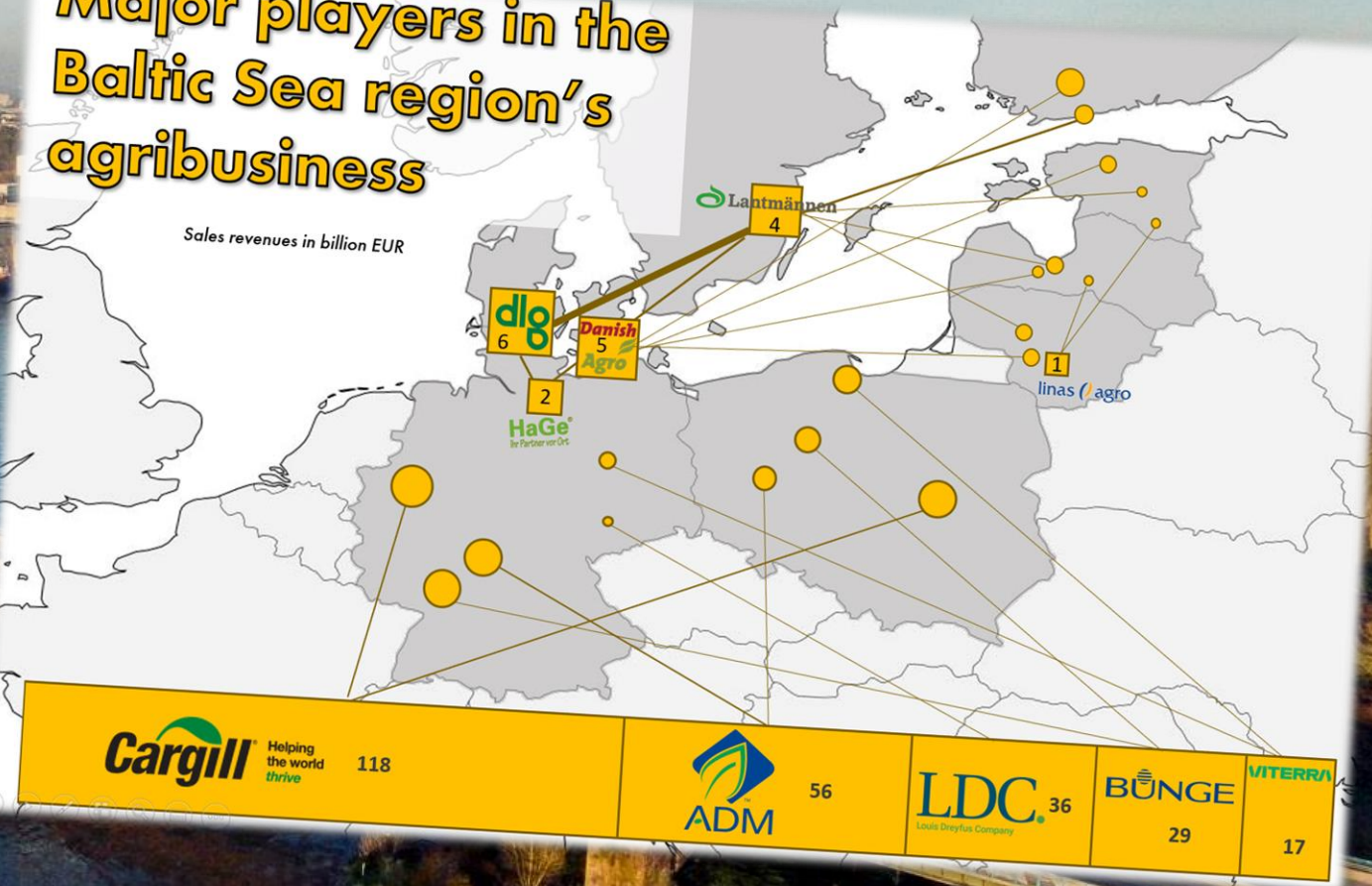


Share of production volume exported as raw material in 2020

Export income from processed products



Major players in the Baltic Sea region's agribusiness



Besides the trade of agricultural inputs and cereals, income is derived largely from processed products.

Value added can be pursued on multinational, nationally and locally operating companies -> examples

Conclusions for the Estonian crop sector

The current export structure in the Estonian crop sector is heavily raw material based.

The importance of value added and processing in increasing export income is clear.

The best path needs to be found, the most feasible project, the most competitive crop and its processed products.