

National Food Strategy 2040, Finland

- A land of happy food

The strategy is the result of extensive stakeholder collaboration and sets a shared long-term direction for developing Finland's food system. It is driven by global challenges such as climate change, geopolitical instability and technological transformation. The aim is to build a proactive, sustainable and profitable food system that safeguards security of supply, reduces negative environmental impacts, strengthens biodiversity and promotes public health. The strategy will be carried out through four-year implementation plans.

Finland's goal is to become a leading developer and reformer of sustainable food systems by 2040. Finland will be recognised globally as a food nation. Food will be produced sustainably and profitably both for domestic markets and for export. Global reach and growth in exports will be driven by high value-added products and food technologies.

The strategy includes four goals: profitability and fairness, security of supply, nature's carrying capacity, and food culture and wellbeing. These are supported by five key capabilities: advancing innovation and technology, stronger expertise, investment capacity, collaborative ecosystems, and an enabling role for public administration. Every stakeholder in the food system shares responsibility for achieving these common goals.

Vision: A land of happy food

A land of happy food – Finland becomes a leading developer and reformer of sustainable food systems. A land of happy food benefits people, animals and the environment.

By 2040, Finland will be a leader in sustainable food production and food technologies. Our food system will stop biodiversity loss in agricultural environments and offer solutions for both domestic and global food security. Finnish food culture will be known for its pure ingredients, sustainability, unique flavours and modern approach.

By 2040, Finnish food production will be diverse and based on models of varying scale. These models will be grounded in the circular economy, safeguard security of supply, food culture and sustainable production, and increase the added-value of the food sector.

Regardless of the scale of production, all those working in the sector will contribute to strengthening biodiversity. Soil and water systems will thrive as nutrients are recycled and side streams are used efficiently.

Harnessing new technology, generating innovation and strengthening expertise will be at the heart of a competitive food system. Research, development and commercialisation will form a seamless whole where challenges are solved through innovation and turned into business opportunities. Technology-neutral and predictable regulation will support progress, while open and fair data will build trust and improve efficiency across the sector. Diverse means will be used to enhance Finland's innovation and investment capacity.

Public administration will share risk, encourage diversified business models and act as a bridge to new market-driven solutions such as carbon and nature value markets. Rural areas and diverse food production regions will be vibrant and ensure regional security of supply. Producer networks will foster a sense of community, use and add to the local resources, and promote their sharing.

Finland will be recognised globally as a food nation. Global reach and growth in exports will be driven by high branding levels, food technologies, innovation and expertise. The Finnish brand will be built on clean nature, public trust and ambitious collaboration.

Finland's food system will halt biodiversity loss in agricultural environments, promote biodiversity, and support human wellbeing and profitability of livelihoods. It will create sustainable added value, new business and more export opportunities. Food is more than just nutrition – it brings people together, supports wellbeing, ensures security of supply, shapes the future, and is a source of pride.

A social contract for the food system will have been established in Finland: a framework where the state, businesses and other key players commit to shared goals and jointly agreed actions to renew the system and create sustainable value.

Consumers will play an active role in the food system. Transparency in the sector and solutions such as digital tools will help people make sustainable and healthy choices. Consumers will be aware of the impact of their choices on the environment, business and food production. Sustainable food will be nutritious, tasty, affordable and easily accessible. Everyday consumer choices will favour local produce, seasonal eating and reducing food waste.

Strategy

The National Food Strategy is built around a vision, four strategic goals and their objectives, and the capabilities to be developed. The strategic goals are profitability and fairness, security of supply, nature's carrying capacity, and food culture and wellbeing. In addition, the strategy process has identified five capabilities to be developed that will support the achievement of the goals.

Strategic goal: Profitability and fairness

By 2040, Finland's food system will be both profitable and fair. It will generate value across the entire food chain from primary production to the consumer. The growing appreciation for Finnish food, along with food businesses' increasingly global reach, will have strengthened the sector's vitality and delivered added value to all those involved. Fair distribution of income across the value chain and decent working conditions will have supported the wellbeing of both business owners and employees. Farm animal welfare and managing the risk of animal diseases are at a high level.

Growth in value added will be based on strengthening the sector's overall profitability, competitiveness and a predictable operating environment. The position of primary producers will be reinforced by increasing their

bargaining power and improving contractual practices, ensuring that their share of consumer prices rises. Value chains in fisheries and the natural products sector will develop, and their turnover will increase. Growth in value added will be driven by higher product branding levels, new value chains, fair income distribution and greater collaboration across the sector, safeguarding the vitality of domestic food production. The growth of small and medium-sized enterprises will be supported, and new, diverse value chains will be developed to complement the existing structure. Short supply chains, local markets and producer-led solutions will strengthen regional value creation and food security.

Finland will be recognised globally as a food nation known for sustainable production. Businesses will develop new export products and technologies where Finland has a natural competitive advantage. Finnish food sector companies will expand internationally, tripling the value of food exports by 2040. Growth in export value will be driven by high-quality raw materials, by increasing the productisation level of plant-based and healthy foods in particular, and by sustainable production methods. Exports will diversify to include not only value-added products but also technology, such as biotechnologies, equipment and expertise. The sector will invest heavily in export skills, brand building and marketing.

The food sector will offer diverse and meaningful jobs that attract young people and new talent to train and work in the industry. Education and employment will be able to attract and retain them in the sector. Attractiveness will be further improved through profitability, wellbeing at work and respect, as well as by investing in education and training, supporting business succession and promoting ecologically sustainable innovations. Fairness in the sector means just distribution of value added, good working conditions and respect for human rights. Research and development will flourish, with more start-ups and increased funding. Finland aims to be the most investment-friendly environment for a sustainable food sector in the EU.

Farm animal welfare will be recognised as part of a sustainable and fair food system. Decision-making will take into account species-specific behavioural needs, such as opportunities for social interaction, movement, outdoor access and sufficient space. Structural changes in livestock farming, such as increasing farm size, will not compromise animal welfare. The competence and responsibility of food sector actors regarding animal welfare will be strengthened, and practices that support animal welfare will be developed based on research. Consumers' access to product-specific information on animal welfare will be improved. Animal diseases will be effectively controlled, and Finland will maintain its salmonella-free and antibiotic-free status. Animal welfare will also be seen as a competitive advantage that enhances the value of Finnish farming and supports export opportunities.

The data economy will create new opportunities and value. Information will flow in multiple directions, from producers to consumers and back, supporting sustainable decision-making. The sector will develop jointly agreed rules on data ownership, cost sharing for data production and data sharing, ensuring that primary producers and small and medium-sized operators benefit from the data economy. Transparent, reliable information will make the origin and environmental impacts of food visible and comparable for consumers. Price and contract transparency, together with data interoperability, will enable equal access to information

and support fair value creation. The data economy will also support research, food security and innovation, and Finland will position itself as a European leader in food sector data economy.

Strategic goal: Security of supply

By 2040, Finland's food system will be secure, shock resistant and capable of adapting to the impacts of climate change. Risk management across production, processing and distribution chains will have been reinforced. The self-sufficiency of critical inputs will have improved in agriculture. The transformation of the food system will have safeguarded the continuity of domestic primary production and preserved a decentralised production structure. Security of supply will also have been bolstered through new value chains, technologies and diversified food production.

The food system will proactively prepare for crises and extreme weather events. Stakeholders across the food system will recognise their roles in maintaining shock resistance and crisis management, and will promote it systematically. Resilience will be enhanced by maintaining farms of different sizes and types, food sector businesses and essential services across Finland. Decentralised energy production, integrated with agriculture and rural enterprises, will help secure energy supply nationwide. Plant and protein self-sufficiency will be increased by diversifying production, developing production chains of domestic protein crop and using new biotechnological solutions in plant breeding and food production. Access to water and energy will be ensured in all conditions, and critical infrastructure will be protected to keep the food system operational even in emergencies. Citizens will become more prepared for crises, both in terms of practical response and material preparedness.

The functioning of primary production will improve and its continuity will be secured in all conditions. The industry will remain attractive, and its profitability will improve. Changes of ownership among primary producers will become easier, and new business owners will receive support during the handover phase. Entrepreneur wellbeing will improve, boosting the industry's economic and social sustainability and appeal. This will also invigorate rural areas and the entire food sector. Finland will leverage and further develop its northern strengths, such as grass-based livestock farming. Climate change adaptation will guide the development of crop species and varieties, cultivation methods and technologies suited to new conditions. Land consolidation will be used to improve production efficiency.

Dependence on imported inputs in primary production and processing will decrease, and domestic self-sufficiency will grow particularly in nutrients, energy, seeds and supplementary protein feeds. Businesses will expand their own and decentralised production capacity for renewable energy. Circular economy solutions will be promoted and domestic seed production and storage improved. The domestic share of fertilisers, feed components and chemical plant protection products will rise. Increasing biogas production will reduce dependence on fossil fuels and improve nutrient recycling. Growing and bedding peat are strategically important raw materials, and their domestic availability will be secured. To prepare for reduced peat availability and price fluctuations, development of alternative domestic substitutes will continue. Availability of labour from specialist roles to machinery repair will be secured to ensure the food system can operate even during disruptions.

Strategic goal: Nature's carrying capacity

By 2040, Finland's food system will maintain and enhance the carrying capacity of nature. The entire food system will have succeeded in reducing greenhouse gas emissions. Biodiversity will have increased in agricultural and natural environments, and nutrient loads in water bodies will have declined. Food production will support sustainable water management and use natural resources wisely. Invasive species affecting food production will be under control.

Carbon dioxide emissions from agriculture and land use will decrease in line with Finland's carbon neutrality targets for 2040. Indirect carbon dioxide emissions from retail and the food industry will also fall significantly, meaning that emissions from food will be lower by then. Emissions from peat fields will be reduced through solutions carried out fairly and in dialogue with farmers and regional stakeholders.

Finland's food system will support biodiversity and work collaboratively to verify and measure impacts on nature. Biodiversity in agricultural environments will increase through changes in production methods such as organic farming, regenerative agriculture, grazing and nature management. Field soil biota and microbiome will become more diverse, and species diversity will be actively monitored at field level. The area of semi-natural grasslands will expand. The food sector will reduce imports and domestic production of products that research shows contribute to biodiversity loss. Plant protection will focus on prevention, reducing the use of chemical plant protection products.

Nutrient emissions into water bodies will decline as nutrients remain more effectively in circulation. Healthy soil will help retain nutrients, and improve water management and productivity of fields. More efficient nutrient recycling will reduce the use of synthetic imported fertilisers. Risks from drought and flooding will be addressed by improving field water management.

Strategic goal: Food culture and wellbeing

By 2040, Finland will have a rich and vibrant food culture that promotes health and wellbeing. The use of domestic ingredients and foods will have increased in households, restaurants and public sector catering. Food will have become firmly established as a central part of Finnish culture, and the sense of community around food will have grown stronger. These developments, together with healthier diets, will have improved the overall wellbeing of the population.

Consumers will choose local and domestic foods. Information about the origin of food, production methods and their impacts on health, the environment and security of supply becomes more widely available and easy to access. Education will provide children and young people in particular a better understanding of the food system and healthy eating habits. Food education and learning about the food system will be strengthened from early childhood education to universities, including making use of the food service industry as a learning environment. Households, catering services and restaurants will use more and increasingly diverse local and domestic products. Public procurement will promote the use of Finnish foods, supporting security of supply at the same time.

Diets will better support individual wellbeing and health. Nutrition will be more widely recognised as a key part of preventive healthcare. All population groups will have access to healthy, domestic food, and its consumption will rise significantly. Consumption of vegetables, berries and fruit will increase, and consumers will have even better opportunities to choose plant-based products for their plates. Salt and saturated fat consumption will fall, while intake of fibre-rich foods will rise. More scientific data on the health effects of food will be available. Nutritional health and sustainability will be more strongly integrated into the work of municipalities, wellbeing services counties, civil society organisations and the private sector.

Finnish food that combines great flavours and new experiences will gain greater appreciation. Understanding of food's cultural significance and heritage, as well as its continuous reinvention, will deepen. The value of local food cultures, such as reindeer husbandry and game hunting, will be highlighted and used more effectively, for example in food tourism. International influences will enrich everyday flavours and culinary traditions. Domestic ingredients and new food innovations will be used in product development and recipes. Restaurant culture will flourish, and food tourism will increase in Finland.

The culture of eating together and the joy of food will grow, with food increasingly fostering community, equality and wellbeing. Catering, especially school meals will gain more recognition and be developed as part of a healthy, accessible and sustainable food culture. Food-related events and shared moments will become more common, bringing together people from different backgrounds and life situations.

Capabilities to be developed

The National Food Strategy will set a long-term direction for developing Finland's food system. It will be guided by implementation plans that advance the objectives set for the strategic goals. Alongside these, the strategy work has identified five key capabilities that are essential for achieving the goals. All stakeholders in the food system should also recognise these capabilities as part of their own operations.

The strategic capabilities will be reviewed and advanced through implementation programmes. They cut across all areas of the strategy and include:

- Advancing and applying innovation and technology
- Investing in skills, learning and openness to change
- Boosting investment capacity
- Building cooperation and ecosystems
- Turning administration into a proactive enabler

Finland's food system is undergoing major transitions that call for smart renewal and sustained development of expertise, cooperation and working practices. Strengthening these strategic capabilities will enhance the food system's ability to adapt and grow. We need innovations, technologies and new operating models that can be scaled swiftly into practice. We also need narratives that highlight possibilities, along with concrete actions that make renewal worthwhile, appealing and valued.

Building up skills, learning and openness to change lays the foundation for sustainable growth and new types of entrepreneurship. Investment capacity must be reinforced through diverse financing solutions that also enable changes in business ownership, attract new entrants and encourage long-term value creation.

The food system must foster tighter, mutually reinforcing networks and ecosystems where trust, collaboration and shared goals drive progress.

The role of administration should evolve from reactive to proactive, requiring regulation, support payments and taxation to be redesigned to help renewal and reward impact.

Developing food and food system innovation is central to our national resilience and competitiveness. Innovation goes beyond technology; it includes new ways of working, digital solutions, social innovation and service innovation.

We need flexible testing environments where solutions can be piloted temporarily outside standard regulatory frameworks. These platforms enable rapid learning, agile experimentation with technologies, and faster uptake of effective solutions. The goal is to scale successful pilots into sustainable business. This calls for determined efforts to develop both innovation activities and the regulatory system. It is vital to ensure that promising solutions do not remain isolated experiments but become embedded in practice and in the everyday workings of the food system.

By strengthening our readiness to adopt innovations quickly, we can safeguard the sustainability of the food system, ensure security of supply and support the growth of export potential.

Renewing the food system takes more than technology. It needs people with the right skills, the courage to embrace change, and the ability to spot opportunities beyond the familiar. We need strong expertise in foresight, markets, exports, circular economy, new cultivation methods and in making full use of research, from practical application to commercialisation. Developing sustainable food systems requires interdisciplinary research to deliver practical and lasting solutions to complex challenges.

Finland must position itself as an attractive destination for top talent, both domestically and internationally. This calls for clear educational and career pathways, robust research and development partnerships, and structures and incentives that encourage entrepreneurship and support young people.

Renewing the food system calls for investment – both flexible early-stage financing and stable capital. Innovation activities can be accelerated through tools such as innovation vouchers, microloans, guarantees and equity financing, alongside reforms to support payments and taxation that promote sustainability and growth. Special attention must be paid to enabling ownership changes and securing investment and financing in agriculture. Access to farm financing must be guaranteed in a situation where bank lending has tightened due to stricter climate and environmental conditions and more stringent financial market

regulation. Financial and structural solutions are needed to ease entry for young entrepreneurs and safeguard continuity of expertise and operations.

Finland needs domestic capital that can also attract international investment. Shared infrastructure and collaborative testing platforms make investments more efficient and reduce risk. The aim is to position Finland as an appealing location for companies and experts developing the food system.

Renewing the food system requires long-term, trust-based collaboration across government, business and sectoral boundaries. Side streams from the forest industry, energy innovations and data expertise can offer valuable solutions for the food sector, provided the ecosystems are built to be functional and compatible. Finland cannot be cut off from the rest of the world. We must actively build networks with leading international players and position ourselves as an attractive partner for expertise and investment.

Collaboration should be encouraged in forums where diverse perspectives can meet, conflicts can be addressed and polarisation reduced. Scattered development efforts must be brought together into purposeful and effective initiatives that drive systemic change.

Public administration must act as a proactive enabler, streamlining operations, encouraging renewal and accelerating sustainable development. Regulation should be forward-looking and designed to empower users: joint permit processes, one-stop-shop services, and clear procedures in service provision lay the groundwork for smooth and efficient operations.

The system of agricultural support payments must be reformed to better promote security of supply, resilience and future-oriented solutions. Performance-based support models, such as those that reward resource efficiency, reduced climate impact and diversified operations, can help turn development in a meaningful direction.

Broad, cross-administrative rural policy will help keep rural areas vibrant, ensuring sufficient services for local residents, remote workers and people who spend leisure time in rural areas.

Public administration will act not as an active supporter offering advice, guidance and encouragement. Tax incentives, sustainable procurement criteria in public sector catering, and commitments to investment and R&D are key tools for creating a predictable and attractive operating environment for those driving change in the food system.

Explanatory note by the National Convenor

The renewal of the national food strategy is included in the program of the present government of PM Petteri Orpo. The work on the strategy was launched soon after the government took office in 2023. In the course of 2024 there were a series of dialogue events, first for the shaping of the vision, and later on various aspect of strategic goals. Dialogue events gathered various combinations of stakeholders, researchers, civil society organizations, political circles and youth. Larger groups of people were reached by the government

consultative net-based tool for legislative processes, and also by specific consultative events in agricultural fairs, meetings with students etc. A number of specific meetings with the Farmers' Federation, Food and Drink Industries' Federation, Groceries' Trade Association were held. A series of regional meetings with stakeholders was organized. All in all, hundreds of active participants and thousands of citizens through this consultative process were involved.

A large and thorough survey of existing data and academic research was collected and analysed.

A political level committee led the work. The practical work was done at the Ministry of Agriculture and Forestry, in close co-operation with relevant other administrative sectors and research institution.

The strategy is a document on enhancing agricultural production and its profitability, rather than a document on food systems' transformation. It does not touch much other elements of the food system, such as produce inputs' market, fisheries and aquaculture, food industries' reorientation, logistics, retail trade, labour and demographic aspects, consumption, health and nutrition (One health), European single market, Common Agricultural Policy, international food market and trade policies, development policies, global food issues - hunger and malnutrition in particular - and their repercussions on national food systems. The strategy is built on an awareness of climate impacts, but chooses not to articulate much on needs of reform food systems to that end. All these aspects will supposedly be dealt with in other policy papers.

The above text is an abstract of the strategy. The entire document is available at:

<https://urn.fi/URN:ISBN:978-952-383-034-9>