

USDA Foreign Agricultural Service

# GAIN Report

Global Agricultural Information Network

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## Estonia

**Post:** Warsaw

### Wood Sector in Estonia

**Report Categories:**

Wood Products

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**Report Highlights:**

For the past five years Estonian timber industry has shown stable growth. Forests and wood industries' share of Estonian GDP reached 22 percent in 2014. The felling volume has increased moderately in recent years. 9.8 million cubic meters of wood was felled in 2014 and 9.5 million cubic meters in 2015. Estonian processors focus on new technologies and high value production. The Estonian wood industry is strongly export oriented and Estonia is a net exporter. Export makes up nearly two thirds of sales for the Estonian timber industry. Wood sawn or chipped dominates in the value of products sourced from the United States to Estonia.

## Role of the agricultural and forestry sector in the economy

The forest product industry is one of the most important branches of the Estonian economy. Timber is a leading natural resource which creates a base for wood processing industries in Estonia. According to the UN FAO Global Forest Resources Assessment (FRA), Estonia ranks sixth in Europe in the percentage of forest coverage of the total country area, after Finland, Sweden, Slovenia, Montenegro and Latvia. Forests cover nearly a half (49.0%) of Estonian territory. In 2014 the total forest area amounted to 2.3 million hectares and the total growing wood stock reached 481 million cubic meters. The timber industry is one of Estonia's largest employers. Forests and the wood and wood product industries provide 38,000 jobs directly and also indirectly in transport, tourism, sports and other sectors. Forests and wood industries' share of GDP reached 22 percent in 2014, while agriculture and food production's was 13 percent. According to Estonian statistics, in 2015 the wood products trade balance was positive and reached EUR 1.226 million (US \$ 1.339 million), in opposition to the all goods Estonian balance which was negative and amounted to EUR -1.458 million (U.S. \$ 1.593 million).

### Timber Supply

In Estonia 41 percent of forested area belongs to the State, 33 percent is owned by real persons, 15 percent belongs to the legal entities and institutions. Estonia regained its independence in 1991 and the land privatization process continues. 8 percent of forest land will be privatized but final determinations are waiting for legal rulings. The most common stands of timber are pine (42.0% of the total area of stands), birch (30.7%), spruce (20.2%), aspen (3.6%) and grey and black alder (3.2%).

### Growing Stock of Estonian Forests

<b>Estonia</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>
Area of forest and other wooded land, HA (000)	2222	2233	2253	2273
Area of stands, HA (000)	2097	2107	2126	2142
Growing stock, million cubic meters	466	468	478	481
Average growing stock Per HA, cubic meters	222	222	225	225
Area covered with forest, %	48.0	48.2	48.7	49.0

Source: Estonian Statistical Office

According to the Estonian Ministry of Environment, the felling volume has increased moderately in recent years. 9.8 million cubic meters of wood was felled in 2014 and 9.5 million cubic meters in 2015. Since the share of mature stands in Estonian forests is relatively big, the felling volumes could be even higher. The "Estonian Forestry Development Program until 2010" specified 13.1 million cubic meters as the optimum forest harvesting level. For this decade, 12–15 million cubic meters per year is deemed the optimum sustainable harvesting level.

### **Gross Felling, cubic meters of solid volume (000)**

<b>Estonia</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>
Regeneration felling	6822	6069	5978	5836
Maintenance felling	1331	1752	1123	1630
Other felling	338	332	310	125
Total felling	8491	8153	7410	7591

Source: Estonian Statistical Office

For the past five years the timber industry has shown stable growth. According to the report of the European Forestry Commission (EFC) in 2014, wood prices continued to rise. While other sectors of the manufacturing industry experienced a reduction in prices last year, the wood industry showed an increase of almost 1 percent.

Timber companies are located all over Estonia, a number of them in small towns or villages. In 2014 wood industry investments increased by 53 percent in comparison with the last year. The value added of the sector has been constantly growing in the past years but it is very diverse in different types of companies. It is much higher in larger strongly automated companies.

### **Production of Wood Products**

Nearly one thousand companies operate in wood processing and manufacture of wood products in Estonia. The players in the market are very diverse – a big group of small companies, mostly Estonian, but also some large international players, with international capital, using modern technologies. They are highly competitive in domestic and foreign markets. The timber industry has a wide range of products from manufacture and processing of lumber to the manufacture of wooden houses, windows and doors. The Estonian cellulose and paper industries have a long history, some factories (e.g. in R pina) have been in operation since the mid-19th century. Local species of wood are used in production. Raw material comes from local forests as well as from import, originating mostly from Russia, Latvia and Lithuania.

The furniture industry in Estonia is a sector with long traditions. More than 500 companies operate in the furniture industry in Estonia. They successfully compete on foreign markets, mostly in Western Europe. About two thirds of the output is exported, but in the last few years the proportion of export has slowly reduced as the domestic market has been significantly stronger in comparison with the main foreign markets. The main export countries of destination in 2014 were Finland, Sweden, Denmark, Norway and Germany and the main exported product groups were seats, furniture parts, dining and living room furniture, wooden kitchen furniture, wooden bedroom furniture and other furniture products.

Estonian paper industry has a strong position in the European market. According to EFC the sector's main players in Estonia are two companies: pulp producer AS Estonian Cell which made 70 million euros of turnover in the year 2014, and the paper and board manufacturer Horizon Tselluloosi ja Paberi

AS with a slightly smaller turnover. Together, they provide more than two-thirds of the sector's revenue. In 2014 the sales volumes of the paper industry showed a nearly 3% increase. The source of growth was mostly exports.

More than 8,000 wood construction companies operate in Estonia, of whom 90 percent are micro enterprises with less than 10 employees. Estonia's construction industry has largely been oriented to the internal market. Its development is closely linked to overall economic development. According to the EFC, in 2014 Estonian construction companies builds totaled EUR 3.22 billion (U.S. \$ 3.52 billion), which was 2 percent less than in the previous year. In the past year a total of EUR 164 million (U.S. \$ 179 million) of profit was made which was 39.8 percent less compared to the level for 2013.

Estonian processors focus on new technologies and high value production. With great success new technologies have been used in wood houses production (high tech acoustic wood sheets used in many storages wood houses) or in the ship industry (liquid natural gas containers).

## Trade

The Estonian wood industry is strongly export oriented and Estonia is a net exporter. Export makes up nearly two thirds of sales for the Estonian timber industry. According to the Estonian Statistical Office, in 2015 total wood industry exports reached EUR (1.83 billion, U.S. \$ 2.0 billion) with the most important position held by sawn and planned wood (EUR 343 million, (U.S. \$ 375 million), followed by wooden buildings (EUR 278 million, U.S. \$ 304 million), wooden furniture (EUR 254 million, U.S. \$ 277 million), wooden construction details (EUR 243 million, U.S. \$ 265 million), pellets (EUR 124 million, U.S. \$ 135 million), round wood (EUR 111 million, U.S. \$ 121 million) , pulp (EUR 71 million, U.S. \$ 78 million), unbleached paper (EUR 50 million, U.S. \$ 55 million), and others. Estonia is the biggest exporter of wood houses in Europe. Wooden houses segment has continued its strong growth for the last few years', exports grew by almost 13 percent in 2014. The main target market is Norway. Wooden houses that can be assembled on site were sold for a total of (EUR 235 million, U.S. \$ 286 million) in 2014. Estonia exports construction details (windows, doors, laminated timber, etc.) and their exports increased by 13 percent. Scandinavian countries are the major target markets as well for this group of goods.

According to Eurostat data, Estonian Wood and Wood Products exports amounted to U.S. \$ 833 million. The differences between local Estonian and Eurostat statistics are related to different aggregations of products. The main export destinations are Scandinavian markets, neighboring countries like Latvia and the main EU wood buyers like Germany, United Kingdom. Estonia sells its products also to Japan and South Korea. Total exports to the U.S. amounted to U.S. \$ 15 million, directly followed by China (U.S. \$ 12 million).

### Estonia's Export Statistics on Wood & Wood Products from Partner Countries, Calendar Years.

Partner Country	U.S. \$ (000)			% Share			% Change 2015/
	2013	2014	2015	2013	2014	2015	

							<b>2014</b>
World	867561	951231	832706	100.00	100.00	100.00	- 12.46
Sweden	119389	129868	111744	13.76	13.65	13.42	- 13.96
Finland	109646	115378	94259	12.64	12.13	11.32	- 18.30
Norway	97328	107549	86145	11.22	11.31	10.35	- 19.90
Latvia	56088	74035	66477	6.47	7.78	7.98	- 10.21
Germany	66559	72456	59797	7.67	7.62	7.18	- 17.47
United Kingdom	51087	58353	52303	5.89	6.13	6.28	- 10.37
Denmark	29812	53648	51170	3.44	5.64	6.15	- 4.62
Japan	54323	40609	36001	6.26	4.27	4.32	- 11.35
Poland	27462	32123	27039	3.17	3.38	3.25	- 15.83
Australia	18028	21557	26901	2.08	2.27	3.23	24.79
Netherlands	24231	27742	24862	2.79	2.92	2.99	- 10.38
France	24282	28664	23255	2.80	3.01	2.79	- 18.87
Lithuania	18878	23348	19624	2.18	2.45	2.36	- 15.95
Korea South	19659	16842	16864	2.27	1.77	2.03	0.13
<i>United States</i>	<i>10648</i>	<i>11629</i>	<i>14827</i>	<i>1.23</i>	<i>1.22</i>	<i>1.78</i>	<i>27.50</i>
China	7848	12335	12054	0.90	1.30	1.45	- 2.28

Source: Eurostat

### **Estonia's Import Statistics on Wood & Wood Products from Partner Countries, Calendar Years.**

Partner Country	U.S. \$ (000)			% Share			% Change
	2013	2014	2015	2013	2014	2015	2015/2014
World	375814	419919	358115	100.00	100.00	100.00	- 14.72
Russia	145342	158472	131692	38.67	37.74	36.77	- 16.90
Finland	52270	72626	70213	13.91	17.30	19.61	- 3.32
Latvia	62742	63372	48744	16.70	15.09	13.61	- 23.08
Lithuania	15116	17158	17510	4.02	4.09	4.89	2.05
Poland	9765	13545	14244	2.60	3.23	3.98	5.16
Sweden	20841	18534	14210	5.55	4.41	3.97	- 23.33
Germany	15183	15075	11011	4.04	3.59	3.07	- 26.96
<i>United States</i>	<i>10173</i>	<i>15053</i>	<i>9651</i>	<i>2.71</i>	<i>3.58</i>	<i>2.70</i>	<i>- 35.89</i>
Belarus	7389	8919	9353	1.97	2.12	2.61	4.86
Ukraine	4816	4493	5050	1.28	1.07	1.41	12.39
Norway	2207	3522	3618	0.59	0.84	1.01	2.74
Denmark	3669	4406	3391	0.98	1.05	0.95	- 23.02
Netherlands	2931	2039	1850	0.78	0.49	0.52	- 9.29
Italy	1287	2882	1789	0.34	0.69	0.50	- 37.92
Belgium	1263	1851	1611	0.34	0.44	0.45	- 12.98
Austria	2550	2271	1600	0.68	0.54	0.45	- 29.52
Czech Republic	862	766	1518	0.23	0.18	0.42	98.15

China	1642	1557	1408	0.44	0.37	0.39	- 9.54
United Kingdom	3543	1533	1237	0.94	0.37	0.35	- 19.26
Slovenia	1479	1394	1178	0.39	0.33	0.33	- 15.54
Brazil	3212	1729	1150	0.85	0.41	0.32	- 33.48
Ireland	1495	1127	1137	0.40	0.27	0.32	0.89
Indonesia	306	732	750	0.08	0.17	0.21	2.49

Source: Eurostat

Estonia is also a big importer of wood products. In 2015 imports of Wood and Wood Products amounted to U.S. \$ 358 million. The main suppliers were traditionally Russia and other neighbor countries of the region like Finland, Latvia, Lithuania and Sweden. Estonian wood industry sources mostly round wood and raw material for further processing from these markets. United States ranked as the eighth supplier of Wood and Wood Products to Estonia with sales valued U.S. \$ 15 million in 2014 and U.S. \$ 9.6 million in 2015.

**U.S. exports of forest products to Estonia, Calendar Years.  
(U.S. \$ million)**

	2012	2013	2014	2015	% change 2014-15
Total Agricultural Fish&Forest Products	29.5	34.3	45.4	31.3	-31.1
Forest Products	9.8	9.5	15.2	8.2	-45.6

Source: USDA BICO

**U.S. imports of forest products from Estonia, Calendar Years.  
(U.S. \$ million)**

	2012	2013	2014	2015	% change 2014-15
Total Agricultural Fish&Forest Products	18.1	25.3	27.3	28.4	4.0
Forest Products	11.8	17.7	17.1	18.6	8.8
of which:					
Logs & Chips	0.0	0.0	0.1	0.0	-91.7
Hardwood Lumber	0.7	0.5	0.4	0.3	-8.8
Softwood&Treated Lumber	0.1	1.4	1.1	1.7	64.4
Panel Products	2.4	3.7	4.1	5.0	22.2
Other Value Added Wood Products	8.6	12.0	11.5	11.5	0.1

Source: USDA BICO

USDA BICO statistics show different values of bilateral trade between the U.S. and Estonia than Eurostat. According to BICO, Estonian imports of forest products from the U.S. in 2015 were valued at U.S. \$ 8.2 million and exports to the U.S. amounted to U.S. \$ 18.6. The difference occurs due to a different aggregation of products and transshipments included into the BICO statistics. Total trade between the U.S. and Estonia was constantly growing until 2014 and reached U.S. \$ 32.3 million in 2014. In 2015 U.S. exports to Estonia fell due to changes in the currency exchange rates and then on price competitiveness. The Estonian market is highly sensitive to prices and currency volatility between the EUR versus U.S. dollar. Estonian industry has been oriented mostly to European suppliers also due

to lower proximity.

**Estonia's Exports of Selected Wood & Wood Products to U.S., Calendar Years,  
U.S. \$ (000)**

<b>Commodity Code</b>	<b>Commodity</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>% Share in 2015</b>	<b>% Change 2015/14</b>
Wood & Wood Products		10648	11629	14827	100	27.5
4407	Wood Sawn or Chipped	5187	5194	7002	47.22	34.81
4409	Wood Continuously Shaped	1675	2174	2674	18.03	23.01
4408	Veneer Sheets	3647	3966	4214	28.42	6.26
4420	Wood Marquetry, Jewel Case etc.	6	48	75	0.51	56.91
4415	Packings Etc, Wood; Pallets, Collars Etc, Of Wood	16	54	46	0.31	-14.37
4418	Builders' Joinery And Carpentry Of Wood	53	73	337	2.27	359.82

Source:Eurostat

**Estonia's Imports of Selected Wood & Wood Products from U.S., Calendar Years,  
U.S. \$ (000)**

<b>Commodity Code</b>	<b>Commodity</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>% Share in 2015</b>	<b>% Change 2015/14</b>
Wood & Wood Products		10173	15053	9651	100	-35.89
4407	Wood Sawn or Chipped	9001	13809	8954	92.78	-35.16
4409	Wood Continuously Shaped	20	128	58	0.61	-54.4
4408	Veneer Sheets	1116	813	579	6.01	-28.76
4420	Wood Marquetry, Jewel Case etc.	6	3	4	0.05	40
4411	Fiberboard Of Wood Or Other Ligneous Materials	26	120	49	0.51	-59.15
4418	Builders' Joinery And Carpentry Of Wood	0.3	176	0.1	0	-99.91

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Source:Eurostat

**Estonia's Import from U.S. of Wood Sawn Or Chipped Lengthwise, Sliced Or Peeled, More Than 6 Mm (.236 In.) Thick (HS: 4407), Calendar Years.**

Commodity	Description	U.S. \$ (000)				% Change 2015/2014
		2013	2014	2015	2015	
4407	Wood Sawn Or Chipped Length, Sliced Etc, Ov6Mm Th	9001	13810	8954	100	-35.16
440795	Ash, Sawn Or Chipped Lengthwise, Sliced Or Peeled	5307	10416	5450	60.87	-47.67
440791	Oak Wood, Sawn, Sliced Etc, Over 6 Mm Thick	2774	2498	2849	31.82	14.06
440799	Non coniferous Wood Nesoi, Sawn, Sliced Etc, Ov 6Mm	713	810	610	6.82	-24.62
440793	Maple Sawn Or Chipped Lengthwise, Sliced Or Peeled	0	19	40	0.45	111.01
440794	Cherry, Sawn/Chipped Lengthwise, Sliced/Peeled	7	0	4	0.05	n/a
440710	Coniferous Wood Sawn, Sliced Etc, Over 6 Mm Thick	200	67	0	0	-100

Source:Eurostat

Wood sawn or chipped dominates in the value of products sourced from the United States to Estonia. Veneer sheets sales take the second position in this regard. Estonia sources mostly ash, oak and non-coniferous wood. There is a potential for hardwood U.S. exports as a niche raw material for Estonian wood processors, but the market is under strong competitive pressure, and very sensitive to world prices changes. The growing tendency towards further processed sawn wood and wood products in Estonia creates promising potential for niche types of hardwood exports from the United States.

**Estonia's Imports of Logs & Chips per countries of origin, Calendar Years.**

Partner Country	U.S. \$ (000)			% Share			% Change 2015/2014
	2013	2014	2015	2013	2014	2015	
World	35653	30341	29440	100.00	100.00	100.00	- 2.97
Latvia	27065	22636	18549	75.91	74.60	63.00	- 18.06
Finland	840	1159	4399	2.36	3.82	14.94	279.42
Russia	1861	2114	2452	5.22	6.97	8.33	15.97
Poland	907	647	1244	2.54	2.13	4.23	92.20
Lithuania	1461	540	1153	4.10	1.78	3.92	113.56
Ukraine	2259	2488	848	6.33	8.20	2.88	- 65.94
Sweden	888	196	239	2.49	0.65	0.81	21.73
Belarus	152	25	185	0.43	0.08	0.63	637.32



Norway	36	232	161	0.10	0.76	0.55	- 30.50
Hungary	57	49	116	0.16	0.16	0.40	135.60
Germany	16	251	49	0.04	0.83	0.17	- 80.35

Source:Eurostat

**Estonia's Imports of Panel Products (incl. Plywood) per countries of origin, Calendar Years.**

Partner Country	U.S. \$ (000)			% Share			% Change
	2013	2014	2015	2013	2014	2015	2015/2014
World	95762	94307	80136	100.00	100.00	100.00	- 15.03
Russia	30104	31272	23966	31.44	33.16	29.91	- 23.36
Latvia	13727	15273	16136	14.33	16.20	20.14	5.65
Germany	10350	10112	7279	10.81	10.72	9.08	- 28.01
Finland	7840	7782	6578	8.19	8.25	8.21	- 15.47
Poland	5570	6592	6562	5.82	6.99	8.19	- 0.45
Norway	1165	1989	1971	1.22	2.11	2.46	- 0.88
Belarus	1775	1894	1596	1.85	2.01	1.99	- 15.76
Netherlands	1390	1567	1384	1.45	1.66	1.73	- 11.65
Austria	1878	1832	1273	1.96	1.94	1.59	- 30.52
Belgium	1002	1528	1241	1.05	1.62	1.55	- 18.81
Czech Republic	238	284	1181	0.25	0.30	1.47	315.19
Ukraine	1188	1267	1116	1.24	1.34	1.39	- 11.87
Slovenia	1204	1171	1087	1.26	1.24	1.36	- 7.16
Brazil	3116	1655	1087	3.25	1.76	1.36	- 34.34
United Kingdom	3378	1321	1041	3.53	1.40	1.30	- 21.19
Ireland	1395	1118	1029	1.46	1.19	1.28	- 7.94
Lithuania	911	1156	970	0.95	1.23	1.21	- 16.10
Sweden	5281	1167	844	5.51	1.24	1.05	- 27.68
Italy	348	1285	714	0.36	1.36	0.89	- 44.47
United States	1144	934	629	1.19	0.99	0.79	- 32.67
Romania	923	832	577	0.96	0.88	0.72	- 30.64
China	473	512	487	0.49	0.54	0.61	- 4.81

Source:Eurostat

**Estonia's Imports of Softwood and Treated Lumber per countries of origin, Calendar Years.**

Partner Country	U.S. \$ (000)			% Share			% Change
	2013	2014	2015	2013	2014	2015	2015/2014
World	200840	234366	196171	100.00	100.00	100.00	- 16.30
Russia	112371	121253	97799	55.95	51.74	49.85	- 19.34
Finland	35287	56485	55531	17.57	24.10	28.31	- 1.69
Latvia	31379	30889	20434	15.62	13.18	10.42	- 33.85
Sweden	11679	11620	8777	5.82	4.96	4.47	- 24.47

Lithuania	4128	5121	6211	2.06	2.18	3.17	21.30
Belarus	4506	5857	5407	2.24	2.50	2.76	- 7.69
Denmark	1	465	585	0.00	0.20	0.30	25.69
New Zealand	133	362	341	0.07	0.15	0.17	- 5.84
Ukraine	238	176	241	0.12	0.08	0.12	36.84
Poland	2	300	197	0.00	0.13	0.10	- 34.34
France	140	187	169	0.07	0.08	0.09	- 9.62

Source: Eurostat

### Estonia's Imports of Hardwood Lumber per countries of origin, Calendar Years.

Partner Country	U.S. \$ (000)			% Share			% Change
	2013	2014	2015	2013	2014	2015	2015/2014
World	30384	37444	34906	100.00	100.00	100.00	- 6.78
<i>United States</i>	8802	13743	8954	28.97	36.70	25.65	- 34.85
Russia	2066	5124	8832	6.80	13.68	25.30	72.37
Latvia	3809	4571	3674	12.54	12.21	10.53	- 19.61
Ukraine	2918	2674	3263	9.60	7.14	9.35	22.02
Lithuania	4437	2583	2747	14.60	6.90	7.87	6.36
Germany	2578	2277	2543	8.48	6.08	7.29	11.73
Belarus	1074	1088	2085	3.53	2.90	5.97	91.68
Finland	1424	1100	939	4.69	2.94	2.69	- 14.55
Canada	1679	2425	560	5.53	6.48	1.60	- 76.90
Poland	106	175	423	0.35	0.47	1.21	142.26
Indonesia	149	389	256	0.49	1.04	0.73	- 34.34
Cameroon	46	268	133	0.15	0.72	0.38	- 50.30

Source: Eurostat

### Policy

The general forest policy is responsible for natural resources and good practices in forests management and it is open for industrial use of wood potential. The framework document for the development of Estonian forests is the "Estonian Forestry Development Program until 2020". The main goals of the policy are to safeguard the productivity and viability of forests and ensure the varied and effective use of forests. In order to achieve these aims industrial use must be combined with an increased volume of reforestation. 10 percent of the forest area is kept under strict protection.

In 2015 the State Forest Management Centre (SFMC) planted 6,070 hectares of forest and sowed 466 hectares of forest. Works to contribute to natural forest regeneration were carried out on 1,740 hectares by the SFMC. The area of maintenance of young stands has increased as well. While in 2010 the total area of cleaning in state and private forests covered 14,066 hectares, in 2015 it covered 19,418 hectares. Since 2014 no official data on reforestation in private forests has been collected; however, indirect data show an increase in reforestation in these forests as well.

### **Certification Schemes for forest products**

There are 2 forest management/chain of custody (COC) certificate systems used in Estonia – FSC (Forest Stewardship Council) and PEFC (Program for the Endorsement of Forest Certification). Estonian FSC working group approved Estonian national FSC standard in April 25, 2008. Estonian national PEFC scheme was approved in March 04, 2008.

### **Latvian timber industry associations**

Estonian Forest and Wood Industry Association  
Telliskivi 60, Tallinn 10412 Estonia  
Phone +372 656 7643  
e-mail: [info@empl.ee](mailto:info@empl.ee)

Estonian Furniture Industry Association  
Parnu mnt 160E, 11317 Tallinn Harjumaa Estonia  
e-mail: [info@furnitureindustry.ee](mailto:info@furnitureindustry.ee)

Estonian Woodhouse Association  
Toompuiestee 21, 10137 Tallinn, Estonia  
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### **Government institutions:**

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**End of Report.**