RDI for the Estonian Forest-based Sector: Expectations and Performance

Paavo Kaimre
Chair, NSG Estonia
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Eesti metsasektori uurimis- ja arendustegevuse strateegia
2008–2013
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1. Promoting Sustainable Forest Management

Expectations:

Resultant use of ICT in forest management;
Improvement in the quality and productivity of harvesting;
Implementation of research based forest management.
Forest register
2. Promoting the Multiple Forest Use

Expectations:

- Maintaining the recreational value of forests nearby towns and settlements;
- Increase in the use on non-wood forest products.
Recreational services
3. Ensuring the Biodiversity

Expectations:

Functioning network of forest protection areas;
Relevant model of forest management for protected areas;
Maintaining biodiversity in commercial forests.
Restrictions on Forest Management,
% of Forest Area

- Protected forests: 11.7%
- Protection forests: 12.6%
- Woodland key habitats: 0.3%
- Commercial forests: 75.4%

Source: Yearbook Forest 2016
4. Adding Value to Timber as a Material

Expectations:
Increased use of domestic timber diminishes the dependence on imported wood;
Increased use of wood in construction;
Investments into wood processing industry which supports the increase in added value.
Adding value to timber

![Graph showing added value of forest sector companies at chain-linked volumes (reference year 2005) in 2000–2016. Source: Yearbook Forest 2016.](image-url)
Added value per harvested m³ in 2013

Source: Finantsakadeemia OÜ, AB
Eversheds Sutherland Ots, 2017
5. Establishing Development Centre of Wood Technology

Expected result:

Development centre of wood technology as an independent legal body

It was intended to establish the centre within the frames of Technology Development Centre’s programme. Consortia of universities and enterprises. The initiative failed, TDC was not established.
Establishing Development Centre of Wood Technology

The Centre of Competence for Wood Processing and Furniture Manufacturing is a network linking the public sector, private industry, educational and research institutions, providing knowledge, skills and best practices in materials and technologies to advance production, management and product development in wood processing and furniture manufacturing.
Garage48
WOOD
Oct 20-22, 2017
@Väimela Tech House

Hack the WOOD!
6. Utilization of Bioenergetic Potential of Forests

Å Expectations:
Creation of added value by the use of forest and timber residuals;
Solving the contradictions between energy production and wood manufacturing;
Minimizing the environmental impact caused by using wood fuels.
Use of Wood as a Source of Energy

_Graanul Invest_ – the largest pellet producer in Europe, annual production capacity 2.3 million tons of pellets

Source: Graanul Invest www.graanulinvest.ee

Increase in using wood as a fuel grew between 2008 and 2015 from 3.7 million m3 to 4.6 million m3.

Source: EMPL, M.Raudsaar, 2017
7. Appropriate Policy Tools for Efficient Forest Governance

Expectations:

Improvement of the reputation of the forest sector;
Efficient governance of the forestry;
Increase of the competitiveness of the sector.
Appropriate Policy Tools for Efficient Forest Governance

National Forestry Program until 2020 was approved by the Parliament in 2011.

Initiative to make changes in the Forest Act triggered „forest battle“ at the end of 2016 and the first half of 2017.
Conclusions

Development of the sector is based on innovations implemented by private companies and public institutions;

Technology transfer from other sectors;
Conclusions

Fundamental research is carried out mainly by universities and financed from public funds;

Mid- and long-term research programmes are essential;

Public-private-academic partnership is crucial in the future.
Thank you for your attention!

paavo.kaimre@emu.ee