



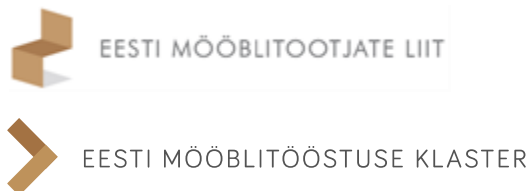
Estonian furniture industry led by exports

Forestry is one of the foundations of the Estonian economy, and our furniture industry is one of the most traditional and competitive industries. Estonian forestry and wood companies do not consider Estonia, with its population of 1.3 million, to be their home market; instead, it is the whole Baltic region with its population of around 100 million – 75% of the production of the Estonian furniture industry is exported. Wood products are in third place in our economy and exports; and furniture is in fifth place.

According to Robert Pajussaar, Chairman of the Board of the Estonian Furniture Industry Association, the fact that Estonia is at the border of countries of low and high living standards gives us great development opportunities. 'As private Estonian forests have fragmented ownership, felling volumes are not likely to increase quickly. What we can do is increase the volumes of primary processing of raw material for wood in our neighbouring countries, for example, in Latvia, Lithuania and north-western Russia and focus on making final products in Estonia,' says Mr. Pajussaar.

'Currently we are entering a new phase of development where, in addition to subcontracting, Estonian furniture manufacturers – not only big ones but smaller producers as well – are finding their own strong products and trademarks. Manufacturers are well equipped, and they can offer reasonable prices and quality. The problem is in the marketing, though,' says Andres Juhan Bernadt, Development Manager of the Cluster, when describing the current situation.

Estonian furniture makers' reputation is high among clients. For example, Kalla Mööbel has furnished the office of Skype, an internationally renowned company of Estonian origin. Standard is a well-known office and hotel chain furnisher both in the European Union as well as Russia. Woodman is a home furniture company that has a highly experienced team of designers and product development that creates and designs their products, which are exported everywhere, even to the US, Canada and Japan. Bellus's sofas sell well all over Europe. Sarkop makes furniture on the basis of specific orders and has implemented projects for hotel chains such as the Hotel Miss Clara by Nobis (an exclusive hotel chain in Sweden), Radisson Blu, Scandic, Sokos, Park Inn and Best Western throughout Europe. Tarmel Furniture is a soft furniture maker with 90 years of experience. Kitman Thulema exports its products mainly to Finland, Denmark, Sweden, Russia, France, Latvia and Lithuania. Apart from these, several other big and small companies, that mostly work on the basis of specific orders, have found their way to the export markets. Further information on them can be found at furnitureindustry.ee.



Cooperation saves costs

The Estonian forest and wood cluster has developed fast and been successful in the last decade. The desire to compare itself with the forest and wood clusters of Nordic Countries, these being some of the most competitive in the world, indicates courage to set ambitious targets and willingness to work towards these.

The activities of the cluster are mainly targeted towards manufacturing enterprises. The principle of the cluster is to cooperate to gain access to new markets or purchase material, develop personnel and develop new products together. The members of the cluster have seller-buyer relations, similar technology, similar customers and distribution channels and similar personnel.

‘In our five-year visions, the production capacities of companies have increased as has the number of trained specialists. The number of members of the association has exceeded 100, and cooperation between them has improved. The popularity of the specialty and the field has increased,’ forecasts Herkki Kitsing, CEO of the Estonian Furniture Industry Association.

The Estonian Furniture Industry Association has received several new members this year, and membership continues to grow. Next year, the association will conduct the Fifth Furniture Makers Conference. Preparations are already underway. The 12th skills competition of joiners, Young Master 2015, will also take place next year.

Furniture manufacturers are also going to participate in various bigger furniture and equipment fairs nearby: IMM Cologne 2015, Stockholm Furniture & Light Fair 2015, Milano EXPO 2015, etc.

Estonia needs smarter production

Labour-related topics are important to enterprises: according to a study conducted by Swedbank, one of the biggest banks in Sweden and the Baltic States, 42% of companies are of the opinion that the lack of skilled labour hinders their development.

What kind of labour do Estonian manufacturing enterprises need? The answer is clear – production managers, engineers and technologists are the most sought-after employees (84%). The lack of unskilled labour is much smaller – 41% of enterprises are in need of such employees.

Every third industrial enterprise is planning to increase their personnel; only in some isolated cases do companies want to decrease the number of employees. However, wage pressure is felt by 7 out of 10 companies. No fast wage increase is expected, though: higher wages depend on the ability of enterprises to create more value and increase effectiveness, among other things. The average wage increase is within reasonable limits: 3–8%. ‘The competitiveness of Estonian enterprises is not based on low wages. This is confirmed by operators’ wish to hire better qualified employees,’ says Mr. Kitsing.

Industrial enterprises are reasonably optimistic when making plans. This is confirmed by the 8% growth expectations against the background of the shrinking economy of Western Europe. The growth is expected to take place on the account of external markets, and enterprises are more and more knowledgeable when engaging in exports. According to the statistics of different countries, the export volumes of Estonia, compared to that of our neighbours, are catching up with those of Scandinavia: the respective indicator of Estonia is just 8% short of that of Finland.

‘In a rapidly changing world, enterprises need more skilled specialists. Without regional labour, even state-of-the-art technology does not work. Companies expand their production units with new equipment as well, but new investments take time,’ says Mr. Kitsing.

Study programmes are also constantly being developed to ensure the sustainable development of specialists.

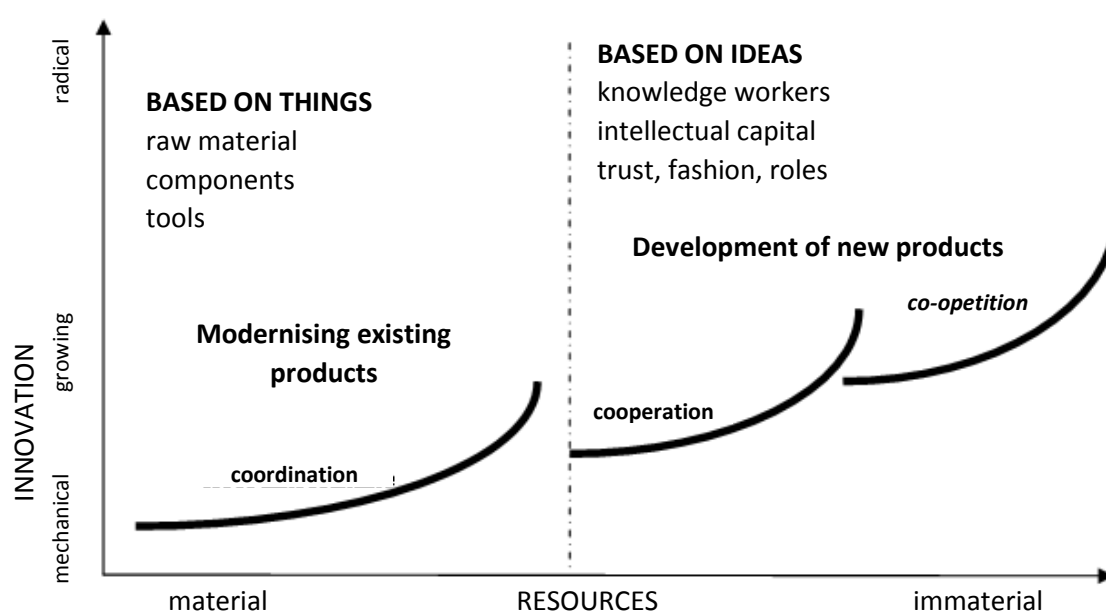


Figure 1. Business cooperation forms in a developing cluster (Formica 2002)



Forestry as one of the pillars of the economy

The forestry and wood cluster is a very important part of the Estonian economy. The wood, paper and furniture industries account for more than 20% of the total production of Estonian manufacturing. It is more than in most other countries of the Baltic region. The forestry and wood cluster is one of the main balancers of the foreign trade of Estonia: its exports of 1.5 billion euros accounted for 12% of Estonian exports in 2012. The added value created in the cluster reached 4% of the GDP in 2011. Thus, for the Estonian economy, it is extremely important for the cluster to develop and be very competitive.

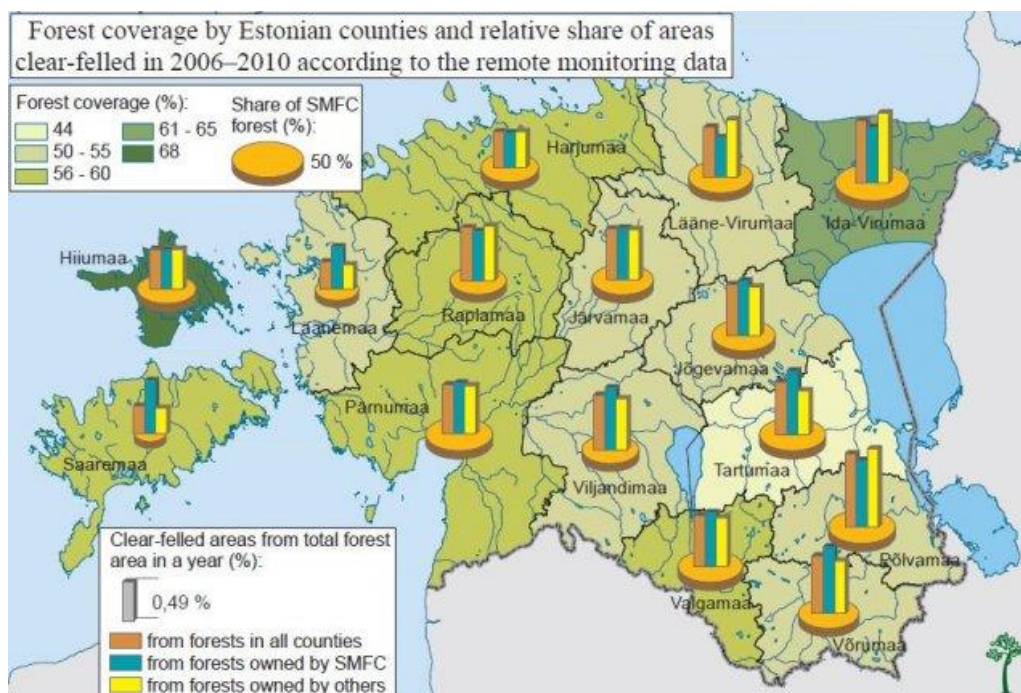
As forests are one of the few renewable natural resources in Estonia, effective use of it to make various final products is very important. In the last decade, the exports of the Estonian forestry, wood and paper industries have constantly grown; however, the growth has become slower in recent years. Nevertheless, these industries already accounted for one-fourth of the total production of Estonian manufacturing: wood processing 16.3%, paper industry 2.5% and furniture industry 6.1%. In addition to the manufacturing linked to the wood sector, forestry accounts for five percent more of the Estonian GDP. The contribution of the wood sector to Estonian exports is even more important. For example, in 2001, the wood industry accounted for 28.8% of Estonian exports, thus being the main balancer of our negative foreign trade balance. It must be emphasised that the wood sector is practically the only branch of manufacturing that balances the negative foreign trade balance created by other industries.

Factbox – Estonian furniture industry:

- total furniture enterprises in Estonia: 568
- employment: 7311
- total production: 370 million euros
- forest land: half of Estonia, i.e. 2.2 million ha
- population of Estonia: 1.3 million
- main species of timber growing in Estonia: pine, birch, oak, ash, spruce, larch
- materials used: solid wood, plywood, medium density fibreboard (MDF), chipboard and fibreboard
- veneer sheets used: oak (European, American), ash (European), pine, cherry, birch, hazel, beech, redwood



Captions



- Compared to other European countries, Estonia is rich in forests: almost half of its territory is covered in forests.

Link: <http://www.keskkonnainfo.ee/main/index.php/et/vesi/category/28-maps-from-publication-qestonian-environmental-monitoring-2007-2010q>



- The Estonian furniture industry uses modern technology.



Source: <http://furnitureindustry.ee/tisleri-kutsevoistlused-2014/>

Photographer: Jüri Minjajev. A fireplace clock of birch and hazel wood and birch plywood, made by Ergo Ojamaa during a competition. There were 13 hours given to do this. Winners were able to complete their work within around 12 hours.

- A piece made during the Young Joiner Competition in 2014.



PESA / PLYWOOD, METAL, WOOL

PESA (seal in Estonian) is formed by six bent plywood details and wooden hand tufted fabric, which creates the seating surface. Plywood remains generally and fully visible. Backrest and seat are light falling from above. It provides a cozy private area.

The form is easily removable and plywood elements stackable.

RUDEI / PLYWOOD, ALUMINIUM, WOOL, LINEN

a comfortable seatstraps outdoor made of light plywood and aluminium. The seat and feet tufted seat cover can easily be removed and cleaned. We consider offering a seat as an act of politeness not an obligation. By giving our seat the name Rudei we contemplate the different sitting customs and look back on „juur“ situations.

ÖHK / TRUCK'S INNER TYRE, PLYWOOD, WOOL

The name of the chair ÖHK (air in Estonian), is symbolic because the upholstered seat contains a truck's inner tyre and can be deflated for transportation. Taking apart the chair's plywood legs is equally as easy. To camouflage the tyre's shape it is upholstered in a hand tufted material with different pile heights. In the stacking process we concentrated on how to reduce the space that the object takes up in transport position. Compared to other same-sized armchairs ÖHK is much lighter and cheaper to transport.

UKA-UKA / PLYWOOD, METAL, WOOL, COTTON

aka unique looky animalised casual tufted attention was inspired by African masks and cartoon characters. The combination of warm and wools tufted seat cover and the graphic metal legs create a bold contrast and add an eclectic feel to the chair. The soft hand tufted seat can be removed for cleaning purposes.

PROJECT STUFF
TARTU ART COLLEGE

Head of Project: Helen Teger

Members: Kalle Kruusenberg, Aasi-Johanna, Heini Arak, Priiska Van der Pijpsche, Aveliina, Liina Tõrr

LEBO / PLYWOOD, WOOL

Many forms create contrast against the soft tufted surface. The tufted material has been following chairs which you can combine by turning it around. The gloves are to change the visual appearance of the chair. We created a toy chair, where you can play and hang.

Tartu Art College

Tartu Art College is a university of applied sciences situated in Tartu, Estonia. In Tartu Art College (TAC), students can acquire education in the speciality of photography, painting and wall painting's restoration, media and advertisement design, furniture design and restoration, leather design and restoration, sculpture and textile. TAC is active as an institution of higher education since year 2000. On grounds of precedence, TAC is related to educational institution of arts Pallas, founded in Tartu in 1910.

TAC's aim is to give the students an education which guarantees their competitiveness in Estonian and European labour market. During their studies, students participate in art, design or restoration projects, working closely with specialists from different subject areas, and also practicing in Estonian and foreign enterprises.

TAC is definitely interested in cooperation projects in areas of art, design and restoration. In addition to that, TAC welcomes projects that focus on cooperation between higher education institutions and businesses. Tartu Art College provides all our students and staff members a creative and motivating environment that enables us to develop new values for the future.

Tartu Art College at international design fairs

Since 2010 Textile and Furniture departments have participated in Stockholm Furniture Fair and exhibited student projects in the Greenhouse pavilion. The last two years TAC has exhibited a cooperation project between the two departments where students can combine their knowledge of furniture design and interior textiles. In 2013 furniture and textile students' project 8 TOOL (eight chairs in Estonian) was exhibited also at London design fair Tent London. Working in teams provided the students with new background information about their neighbouring fields as well as about cooperation in general. Combining different skills and styles made it possible to develop carefully elaborated product prototypes in which the chosen source materials and ideas form both parties act as an organic whole. Throughout the years all the teaching staff in both departments has supported the students with their knowledge. These product development projects have given the students valuable knowledge about cooperation and working in design teams. Exhibiting at international design fairs gives students opportunities to gain contacts for future.

Furniture department

Tartu Art College is the only higher education institution in Estonia, which provides applied education in furniture design and restoration.

Graduates have the ability to realize themselves through independent creative projects or specialized educational research in the course of completing the curriculum. Acquired knowledge can be obtained in various technologies, materials and theories, placing emphasis on the chosen specialty based through specialty field training, original and creative projects and the diploma thesis. The graduates are prepared for working in design and interior architecture business, all surface materials in furniture education companies, small entrepreneurs or solo projects.

Planned to the principle of curricular enrichment, interdisciplinary projects and cooperation opportunities are promoted.

www.artcol.ee/moboo

Head of Department
Jaak Roosi
jaak.roosi@artcol.ee

Textile department

Our aim is to create a creative environment for our students and staff to develop their professional skills as artists and designers. Through special tasks, students practice problem-solving, product development and art projects, master hands-on skills in loom-weaving, fabric printing and knitting. Study projects for textile students are also in the field of fashion design. Specialty subjects are supported by drawing, painting and color studies. During their study-period, students gain work experience in companies, organize fashion shows and exhibitions.

The Department of Textiles is a member of European Textile Network and has good cooperation with Estonian Textile Association, also with textile and fashion related education providing institutions of higher education in Estonia and abroad.

www.artcol.ee/interiioridekujundamine
www.facebook.com/textileart

Head of Department
Aet Olla Saar
aet.ollasaar@artcol.ee

STUFF

The aim of STUFF, a joint product development project of the furniture and textile departments of Tartu Art College, is to find new use for hand tufting technology. Students, working in design teams, came up with five prototypes that use hand-tufted materials for upholstery. Natural pile surfaces not only add decorativeness to laconic forms, but also warmth and softness.

The design goal for all five prototypes was to create a seat that is easy to dismantle and transport. All the tufted materials can be removed for cleaning and maintenance purposes. The main emphasis in the design of the seats is on the use of natural materials: wood, metal, wool.

Exhibiting their work at the Stockholm Furniture Fair gives students the possibility to receive professional feedback on their design solutions and to see their work in a competitive international context. It is also a brilliant opportunity to develop cooperation with other designers, design schools and furniture manufacturers.

Around 30 students participated in the different stages of the project STUFF. The design teams consisted of third and fourth year students; first year textile students took part in making the upholstery material. The layout for the stand was created by furniture department students under the supervision of Aivar Oja, while the graphic drawings used in the design were made by Johanna Müdral, who studies at the painting department. Project STUFF tutors: Jaak Roosi, furniture design; Aet Olla Saar, textile design; project management; Liina Kooli, textile technology.

Tartu Art College exhibits the project STUFF at Stockholm Furniture Fair in the Greenhouse pavilion in stand V904-10.

Tartu Art College
www.artcol.ee
Tähe 36B
Tartu 50103
Estonia

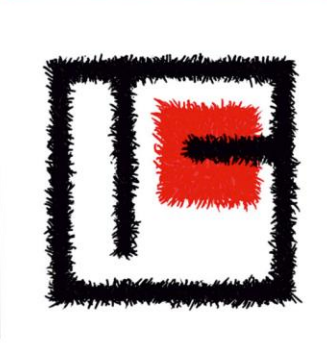
Project STUFF manager Aet Olla Saar
aet.ollasaar@artcol.ee

Photo credits: Jari Saarendina

EESTI KULTURIKAPITAL
Project STUFF is supported by Cultural Endowment of Estonia

Design and layout Riho Tivel

2014



Source: <http://www.artcol.ee/uudised/856-projekt-5stuff-viib-tartu-disainitudengid-viiendat-korda-stockholmi-moeoeblimessile>

- Participating in the Stockholm furniture fair has become a tradition for students of the Tartu Art College.



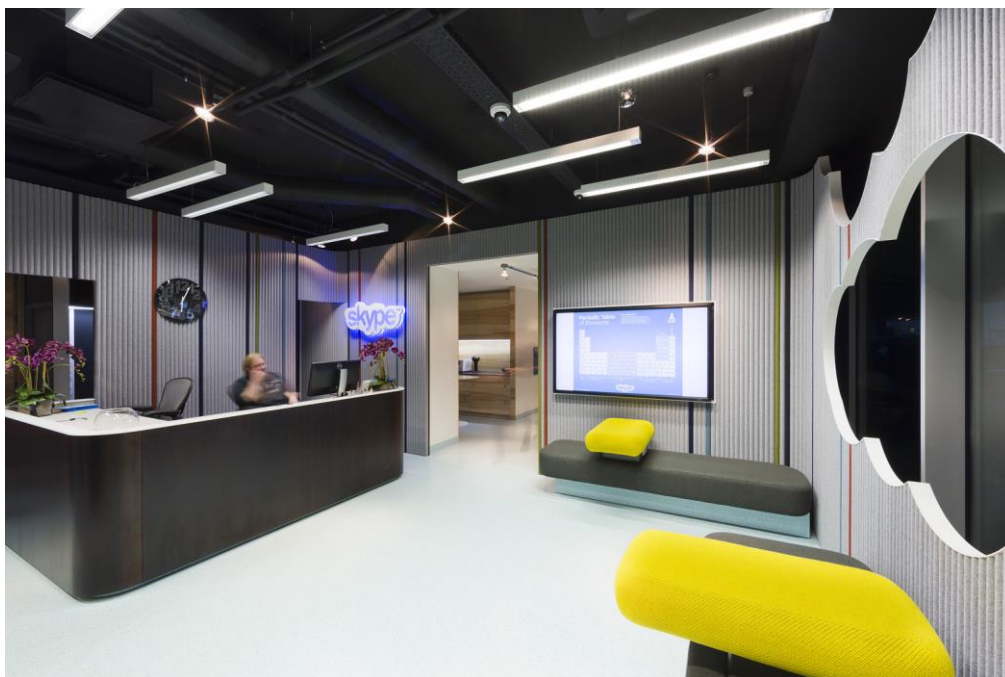
- **Robert Pajussaar, Chairman of the Board of the Estonian Furniture Industry Association, at his production facility on Saaremaa Island, Estonia.**



- **Herkki Kitsing, CEO of the Estonian Furniture Industry Association, at outside the office witch located in Tallinn Science Park Tehnopol next to Skype and near to the Tallinn University of Technology, in Tallinn, Estonia. Photographer: Priit Luik.**



- AS Sarkop furnished an exclusive hotel chain in Sweden: Hotel Miss Clara by Nobis.



- Kalla Mööbel has furnished the office of the well-known Skype.