Forest sector in Latvia 2008
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INTRODUCTION

Latvia is a small country but there is one aspect that makes it great – forests. Forests cover more than the half of the territory of Latvia and for that reason our country is often called the forest power country.

Wood in Latvia is the main resource and in comparison for example with oil, that sooner or later will run low, wood is renewable. Taking a good care of it and using with consideration we will not exhaust it but on contrary – increase this treasure. Forest industry provides with work forest owners and companies connected with this industry. Wood processing industry is the second largest producing industry in Latvia.

Forest industry is developing form year to year and is perspective. Since gaining the independence it has become one of the most important economic branches which have successfully developed in current market economy conditions. The development was provided by several factors – high quality raw material basis, long-term traditions, and knowledge and just as important – the ability of state and industries representatives agree on long-term goals and basic principles how to achieve the above mentioned goals.

The forest industry is the largest industry in the country, its competitiveness increases by quickly adjusting to export market requirements. In many European and other countries Latvian wood producers are well known and despite of the world economic struggles our products are in demand.

Latvia forest industry by using the geographical position and former traditions has the ability to be stable, long-term partner in foreign markets and give a significant investment in future.
Forest Policy

The forest industry is based on the use of local resources, and it has every opportunity to become the most important guarantee for economic stability in Latvia. In order to ensure long-term development, however, the forest sector must have access to well-balanced factors which are related to sustainability, whether they be of an economic, ecological or social nature. In reaching agreement on the long-term developmental goals for the forest sector and the fundamental principles related to achieving those goals, therefore, Latvia has developed carefully considered forest sector policies which are primarily aimed at ensuring the sustainable management of the forest and forest-land, the sustainable availability of timber resources, and a predictable environment for the development of forest product processing.

Sustainable development in the forest sector is guaranteed by the Forest Law, which defines norms related to the duties of forest owners when they manage their properties. Before trees in the forest can be cut, for instance, permits are needed. After cutting, stands of forest must be restored within 3 to 10 years’ time, and the newly planted trees must be properly tended. Only certified and appropriate reproductive materials can be used in forest restoration and planting, etc.

One of the main goals of forest sector policy in the timber industry is to ensure that wood processing moves toward a path of intensive, not extensive development. Thanks to major investments in recent years, the timber industry in Latvia has a highly developed process of preliminary timber processing, and this creates good foundations for the further development of wood processing. It is necessary to develop manufacturing that is no longer focused on increasing the consumption of sawn logs. Instead, the focus must be on products with an increasingly higher level of added value for each cubic metre of timber. Development of the timber industry will largely depend on public opinion and positions that are taken. If the public accepts the growth opportunities for the forest in terms of better use of resources and the development of new products, then that will make it possible to manufacture and create new products in support of a better quality of life. It will also be possible to enhance the value of export products which are manufactured.
The forest sector in Latvia is under the supervision of the Ministry of Agriculture (MA). The ministry works with interest groups from the sector to develop forest-related policies, strategies and programmes for the development of the sector, as well as to draft normative acts related to forest management, use of forest resources, environmental protection in the forest, and hunting activities. The ministry evaluates and analyses the situation with forest resources and drafts proposals on how the productivity and use of the forest could be improved. The MA also conducts public opinion surveys and seeks to promote a better understanding about the forest sector in Latvia. The ministry represents the sector at international organisations and processes, co-ordinating international co-operation and drafting international agreements.

A key factor here is that the public and private functions in the Latvian forest sector are kept apart institutionally. Since 2000, government institutions have handled normative and supervisory functions, as defined in the national Forest Policy. These are the MA and the State Forest Service (SFS). Ownership functions in state-owned forests are handled by the state-owned stock company Latvian State Forests (LSF). The SFS is under the supervision of the MA, which also holds the state's shares in the LSF. It, in turn, is responsible for managing the country's state-owned forests.

The SFS makes sure that national normative acts related to the forest are observed in all areas of forestland, irrespective of ownership issues. It also evaluates the normative acts to see whether they are sufficiently effective. The SFS seeks to create proper conditions for the stabilisation of the forest's long-term functions, helps to promote the development of the private sector, provides information to the public about the situation with forest resources in Latvia, provides fire safety supervision and handling of forest fires, as well as the involvement of forest owners in overseeing sites where fires have occurred, again no matter who owns the relevant area of land. The SFS also has a new unit – the Consultation Services Centre (CSC). Its duty is to offer consultations to forest owner on forest management and related issues, to help them to prepare requests for EU assistance, and to offer various kinds of services related to forest management.

For the past 10 years, the Latvian agriculture minister has had the Forest Consulting Council (FCC), which helps to ensure transparency in the taking of fundamentally important decisions for the forest sector, to co-ordinate co-operation between state and public organisations, and to allow all interested parties to take part in the drafting of normative acts which regulate the forest sector. This is a forum in which there is representation of forest owners and managers, the timber industry sector, service providers, environmental and ecological protection organisations, employees, educational and scientific institutions, as well as local governments. When dealing with issues related to the economic, ecological and social functions of the forest, the FCC correlates the interests and viewpoints of various entities in the forest sector so as to strike a balance in terms of sustainable forest sector development policies.
A cluster: A form of co-operation between forest sector organisations and the system of governance

- Association of Independent Timber Harvesting Companies
- Latvian Union of Timber Harvesting Companies
- Latvian Timber Producers’ & Traders’ Association
- Latvian Association of Wood Processing Entrepreneurs and Exporters
- Association „Latvijas Mēbeles”
- Association „Latvijas Koks”
- Latvia University of Agriculture
- Forest Chemical Institute
- Forest Industry Institute Silava
- Latvia Wood Materials Survey Management
- Latvia Forest Industry Technological Platform
- Latvia Forest Industry Technological Platform Competence Center
- Latvia Forest Owners and Managers Confederation
- Latvia Forest Owners Association
- Latvia private forests owners and associations
- JSC „Latvijas valsts meži” – administrator of state forests
The forest and timber are Latvia's main resource. According to statistical inventory data, there are approximately 3.26 million hectares of land in Latvia which are covered by forest or agricultural territories that satisfy criteria related to being turned into forestland. This represents approximately 50.4% of the state’s territory. The average percentage of forestland in the world is just 30.3%, while across Europe it is around 44%. Another indicator is forestland per capita – 1.43 hectares in Latvia, which is 2.4 times more than the global average.

Natural factors and human activity have led to an increase in the proportion of forestland in Latvia. The country’s climate and the specifics of its soil are such that when land is left alone, the forest returns to it. On land that is not used for agriculture, moreover, forests are often planted on purpose. Over the course of the last 70 years, the size of the forest in Latvia has more or less doubled, while the amount of timber in the forest has increased by 3.6 times over, to 648 million cubic metres in total.

The increase of the total timber amount in forests has been ensured not just by the expansion in the amount of forestland, but also by purposeful and sustainable forest management. This involves the use of carefully selected planting materials, professional care for the forest, and a massive reduction of the amount of timber cut. The state of Latvia’s forest is good, according to a forest monitoring programme launched under the auspices of the international “ICP Forests” programme, at least in comparison to the situation in other European countries. This is thanks to the fact that the State Forest Service is constantly monitoring the condition of the forest, and protective steps are planned and implemented in a timely way.

The ownership functions for state-owned forest management and protection are handled by the Latvian State Forests (LSF) company. The country’s forest policy indicates that the state, as an owner of forestland, has two major goals in the management of this property – to enhance the value of forest-related capital, as well as to ensure income from the management of forest properties. The basic duty for the LSF, therefore, is to ensure the highest possible value of the forest for the country and its residents – something that is possible if sustainable management of forest properties is ensured. The LSF manages the forest throughout the cycle of forest operations.
The amount of timber that is cut in Latvia's forests each year remains quite stable – between 10 and 11 million m³ of timber each year. In 2007, 10.12 million m³ of timber were cut – 4.69 million (46.3%) in state-owned forests, and 5.43 million (53.7%) in forests owned by private owners, local governments, or other types of owners.

The proportion of timber coming from state and other types of forests shifts over the course of time, and it is believed that in future, most timber resources will come specifically from state-owned forests. Cutting volumes in privately owned forests are declining in most cases, and the LVM has called for a discussion about the more effective use of Latvia's forest resources.
Forest Restoration

In order to provide the Latvian economy with the necessary timber resources while at the same time preserving ecological balance in the environment and improving the recreational and aesthetic properties of the forest, it is necessary to plant highly productive and biologically durable stands of trees. This can be done through artificial restoration (sowing seeds or planting saplings) or by encouraging natural restoration if it involves species of trees which are appropriate for the relevant growing conditions.

Areas of restored forestland expanded very quickly in recent years, and that means that the overall situation with forest restoration has improved to a notable degree. The amount of forest restoration in state-owned forests has become stable. Requirements concerning forest restoration and decisions taken by forest owners vis-à-vis the types of species of trees that are used for restoration – these factors join together to ensure forest restoration which involves the four species of trees which are of the greatest economic use. These are pine, fir, birch and aspen.

It is expected that in the 2007-2013 planning period, forest owners will have access to support from the European Union’s European Agricultural Fund for Rural Development for forest restoration in the wake of forest fires and/or natural disasters. There will also be support for the tending of new stands of trees, whether they have been naturally or artificially restored. Less valuable types of trees will be replaced, and less productive stands will be replaced with purposefully developed and productive types of trees to enhance biological diversity, as well as ecological and economic value.
Forest sector in Latvia 2008

Forestation

One of the rational ways of using land is forestation – planting new areas of forest in lands that are not used for agriculture. Forested territories can be listed as plantations – stands of trees that have been planted for special purposes.

It is expected that the growing of aspen trees on such land will be particularly promising in the future. This is a species of tree which yields as much as 400 m³ of timber once every 25 years, while other trees take 80 to 100 years to yield the same amount of wood. The Latvian State Forests (LSF) agency has already started commercial production of hybrid aspen saplings. Many of them are exported, and the overall area of land planted with such saplings in Latvia has increased. There was once talk about the aspen being appropriate for pulp manufacturing, but the fact is that it can also be used ideally for energy production and even as sawn wood. The LSF research institute “Silava” has found that the technical properties of ordinary and hybrid aspen timber do not differ in any substantial way, while some clones offer greater density of timber than in case of ordinary aspen. Under unfavourable market conditions or at times of other difficulties, plantations can also be cut down 10 to 20 years later, because older trees also offer a high level of quality, without rot and with trunks that are in line with the demands for high-quality sawn logs.
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THE TIMBER INDUSTRY

The Importance of the Timber Industry in Latvia

The forest sector has demonstrated its status as a sector of strategic importance in the Latvian economy. 8% of all of the companies that are registered in Latvia are linked to the forest sector, and the sector employs approximately 5% of Latvia’s labour force. Turnover in the forest sector – the value of its output – was LVL 1.4 billion in 2007, and approximately 70% of all of the products were exported. That represents nearly one-quarter of Latvia’s overall exports. In terms of value, products from the sector represent approximately one-quarter of output in the processing industries, and its investment in GDP is around 5% of the total. Major investments in manufacturing lines that ensure a high level of added value – most of them outside of capital – have helped to promote regional development in many parts of Latvia. It is expected, moreover, that as the use of timber products increases in areas such as energy production, the role of the forest sector in regional development will continue to increase to a very substantial degree.

The foreign trade balance for the Latvian forest sector is stable and positive by around half a billion lats. In 2007, the value of exports from the sector amounted to LVL 1.02 billion, with imported products worth LVL 482 million. The forecast is that as the sector becomes increasingly successful in satisfying international market demand and continues to develop, the positive foreign trade balance for the sector will reach a level of LVL 1 billion. If the market situation is a good one, the value of the sector’s output could climb to LVL 2 billion in three or four years’ time.

There are many opportunities, also in terms of co-operation with other sectors such as the manufacturing of composite materials, chemical processing of timber, transport, the construction industry, the energy industry, and other areas, as well. That’s why representatives of Latvia’s forest sector are helping to design a technological platform. They are also involved in international programmes which will provide an opportunity to create foundations for the development of new products from local resources.
Equipment, technologies and products in the Latvian timber industry have been replaced and updated in recent years so as to make it possible to use a wider range of tree species, as well as thinner logs. This makes it possible to ensure a substantial expansion in the resources that are available. Latvia’s timber industry is dominated by small and medium companies, and the aforementioned factors are that ones which, on the one hand, have facilitated concentration of capacities and a reduction in the number of companies. On the other hand, this has also led companies to specialise. Larger companies are mostly focused on products which add as much value as possible and are meant for mass usage – building materials, impregnated products, elements for construction, etc. Small and medium companies, by contrast, specialise on niche products such as garden products, finishing materials, packaging materials, interior design elements, etc. In the preliminary processing sector in the timber industry in Latvia, there are modern technologies which satisfy the demands of global markets in terms of productivity and quality of final output. This means that such products have become a stable basis for exports, as well as for the further development of timber and the manufacturing of products with an even higher level of added value right here in Latvia. This is another area in which there have been significant developments. Carpentry products, manufacturing of wood homes – these are areas in which there has been rapid development. The furniture sector has been undergoing restructuring.

In countries which have highly developed wood processing systems, the added value per cubic metre of timber is as much as EUR 400-800. Latvia’s average indicator in this regard is EUR 160/m³, which shows that there is a lot of space for improvement in this regard – the added value can be doubled or even tripled. This will be possible if use is made of the latest knowledge and technologies, if production is intensified, and if new products are developed.

Maintaining competition in the rapidly changing global economic environment will also require a substantial increase in labour productivity and output. Major wood processing and furniture companies have a higher level of output per employee than is the case in the processing industries as such, and yet these companies nevertheless lack far behind the average indicator in the EU. For that reason, increases in labour productivity remain one of the primary challenges for the timber sector in Latvia. The large proportion of wages in output costs means that there is an uncompetitive system of compensation in the industry. Companies must consider about how the large proportion of wages can be replaced with investments in equity assets. Other factors which, in the foreseeable future, will determine the forest sector’s ability to develop include investments which lead to the manufacturing of products with a high level of added value with the necessary manufacturing technologies, development of the energy sector, as well as changes in the role and importance of the forest sector in terms of regional development. All in all, the sector is prepared for a new “leap forward,” because technologies and the development of new products offer excellent opportunities to increase the value of the forest as a resource to a very substantial degree, without endangering other values which are associated with the forest.
As costs between Latvia and the old member states of the European Union even out, companies in Latvia’s forest sector will have to substantially increase financing for science, education and employee training, as well as for an updating of equity assets and restructuring the situation with energy supplies so as to make use of Latvia’s timber resources in as effective way as possible. All of this is necessary to ensure the preservation of competitiveness. The industry must also take into account its geographic situation and its logistics network – factors which make it possible to use timber resources and preliminary processing products from neighbouring countries. This, in turn, makes it possible to expand manufacturing activities on the basis of not just Latvia’s forest resources alone.

### Manufacturing Sectors

#### Forestry Work and the Sale of Roundwood

Roundwood that is produced in Latvia is mostly used to produce sawn wood, wood plates, turned or planed products, timber for energy production, wood houses, furnishings, garden products, charcoal, and other products. It is also exported in the form of pulpwood or firewood. The leading retailer of pulpwood in Latvia is the Latvian State Forests (LSF) stock company. It manages the state’s forest properties – a total of 1.65 million hectares of land, including 1.4 million hectares of forest. In 2007, LSF had turnover of LVL 162.4 million, with profits of LVL 92.7 million. In comparison to 2006, roundwood exports rose by 8% in 2008, while the value of exported timber materials rose by 99%. A total of 3.69 million m³ of timber were exported altogether. Approximately 80% of the exported roundwood was pulpwood, and the situation in 2007 was largely dictated by the activities of companies in Scandinavia. They bought pulpwood in Latvia for unprecedentedly high prices. Traditionally, pulpwood has been exported mostly to Sweden, Finland and Estonia, but as Latvia’s wood plate industry expands and as timber is increasingly used in Latvia as an energy resource, the fact is that there have been many more potential uses for thinner logs right here at home. The largest purchaser of pulpwood, indeed, is the wood plate manufacturer SIA Bolderāja, Ltd., which is planning to enhance manufacturing capabilities in 2008 and 2009 so as to process approximately half of the pulpwood that was previously exported into products that have a higher level of added value.

#### Roundwood imports by country, 2007, thousand m³

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<th>Country</th>
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#### Roundwood exports by country, 2007, thousand m³

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<td>Norway</td>
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<td>United Kingdom</td>
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<td>Other countries</td>
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Sawn logs dominate in the import of roundwood, by contrast. These are processed in Latvia into products with a higher level of added value. In 2007, roundwood imports amounted to 1.7 million m³, but it is clear that that volume is going to decrease. Most of the imported timber came from Russia, but the fact is that Russia has substantially increased export tariffs on unprocessed roundwood. On January 1, 2009, the tariff will increase to EUR 50/m³. The decline in roundwood imports, however, can be fully compensated with local resources. It can also be expected that over the next few years, imports of manufacturing resources will increase largely thanks to partly processed timber such as sawn wood which, in Latvia, will then be processed into products with a higher level of added value.

**Manufacturing of sawn materials**

Manufacturing of sawn materials has traditionally taken up the largest proportion of manufacturing in Latvia’s forest sector, and in the last few years, restructuring of this sector has been completed with success. Over the last several years, between 3 and 4 million m³ of sawn materials have been manufactured each year in Latvia. In 2007, exports of sawn materials were worth LVL 319.6 million, while exports of moulded sawn materials had a value of LVL 16.1 million. Thanks to major investments in modern manufacturing facilities, Latvia has strengthened its positions in world markets as the supplier of sawn materials with a high level of added value – materials that are dried, sorted, planed and impregnated, materials that are meant for end users. As manufacturing has been restructured, approximately one-half of the turnover in Latvia’s timber industry has been created by large and medium-sized manufacturing companies which have chosen to focus on effectiveness as their developmental strategy. These are enterprises which have invested in modern and high-capacity technologies, and most of what they manufacture is exported.

Small and medium-sized sawmills, by contrast, are focused on niche products. They prepare sawn wood components from deciduous timber, their strategy is focused on the services that they provide, and their competitiveness is based on flexibility in terms of changes in market demand. One problem is a certain amount of “natural operations” that have been preserved in this sector. The productivity of those who are involved in the basic manufacturing aspects of this sector is high, but indicators in this regard are often reduced by the fact that the use of outsourced services has not been developed to a sufficient degree. There are also companies which manufacture ineffective and non-specialised secondary products.
Wood Packaging

Wood packaging is something that is produced by many small companies and micro-enterprises, because it is a sector which requires comparatively small amount of investments, and the technologies are rather simple. This is an area of the industry which uses low or medium-quality deciduous timber. At the same time, however, there are approximately 10 companies in Latvia which manufacture high-quality packaging that is in line with EU requirements. Because of the export of higher-quality and more ready-to-use packaging, the total value of wood packaging exported in 2007 increased by 24.2% over the previous year.

True, demand for packaging will depend quite directly on the overall economic situation in markets where it is sold. As the transportation of goods diminishes, the same happens in terms of demand for packaging. This was a problem for the sector in 2008. The main manufacturers of packaging, however, have made substantial investments in technologies, and they are now serious partners for European packaging suppliers. They also supply wood packaging and pallets to Latvia’s leading consumers of such products, and that means that the sector may be able to hold on to its positions.

Trends in wood packaging exports and imports, million LVL

Latvian wood tare export structure according to countries in 2007, %

- Germany: 35.2%
- Netherlands: 26.2%
- Estonia: 17.3%
- Lithuania: 10.3%
- Belgium: 7%
- France: 6.2%
- Denmark: 5.2%
- Sweden: 5.2%
- Russia: 3.9%
- Other countries: 12.8%

Latvian wood tare import structure according to countries in 2007, %

- Germany: 138 million m³
- Netherlands: 170 million m³
- France: 138 million m³
- Belgium: 79 million m³
- Denmark: 6.2 million m³
- Sweden: 5.2 million m³
- Russia: 3.9 million m³
- Other countries: 12.8 million m³
The Wood Plate Sector

Manufacturing of wood plates is one segment of the timber industry which has expanded very substantially in recent years, mostly thanks to major investments in the sector. In 2007, manufacturing of wood plates represented 13.3% of the sector’s export value. Latvia is without doubt the largest manufacturer of plywood in Eastern Europe, and recently there have been unprecedented investments in the manufacturing of wood chip plates, oriented strand board (OSB), and medium-density fibreboard (MDF).

The value of plywood that is manufactured in Latvia has been increasing ever since the restoration of the country’s independence in 1991. In 2007, the value of exported plywood was up by 34.1% in comparison to 2006. Increasingly, manufacturers are selling specialised plywood products, and these are delivered to end consumers at a specific time and place. There are some countries such as France and Italy where the proportion of end users represents as much as 90% of all buyers. In future, too, the sector plans to develop specialised products such as large-sized plywood. Companies will concentrate on stable buyers of more expensive products at larger volumes.

The value of exported wood chip plates in 2007 had increased by 46.6%. That is because of major investments in the sector, as well as of the fact that products which are being manufactured are of a higher level of added value. OSB is a new product for Latvian manufacturers. Bolderāja, Ltd., set up a whole new factory to use chips obtained from thin deciduous logs. The resulting product is outstanding for the construction industry. In technological terms, it can be seen as a hybrid between wood chip plates and plywood.

Similar positive trends have been seen recently in the manufacturing of wood fibre board. After the restoration of Latvia’s independence, this was a market sector which languished for many years, but in the last two years, thanks to USD 60 million in investments by the Jeld-Wen company in Aizkraukle, exports of wood fibre board have increased by no less than 80% a year.
Furniture Manufacturing

Furniture-making is a sector which has long-standing and stable traditions in Latvia, although the types of furniture that are manufactured have changed over the course of time. Until the early 1990s, most furniture manufactured in Latvia was made of wood chip plates. Since the restoration of Latvia’s independence, solid timber furniture has become the main type of product.

The furniture sector needs to change if its competitiveness globally and domestically is to increase. The profitability of solid timber furniture has declined substantially in recent years, because in comparison to other types of furniture, this type uses a great deal of timber per manufactured unit. Demand for such furniture is also down. In 2007, furniture-making was also affected by a decline in Europe’s construction sector. The value of furniture exported from Latvia in 2007 was LVL 80.7 million, but that was 7.4% less than in 2006. There are several companies which have successfully begun the development of original designs for furniture. Such restructuring, however, demands major investments in technologies and human resources. Still, many manufacturers have proven themselves in the international market with originally designed furniture – bent and glued chairs, for instance, as well as high-quality bedroom furnishings.

Trends in the export and import of furniture, million LVL

Export of Latvian furniture according to countries, %

- Germany: 19.3%
- Denmark: 18.3%
- United Kingdom: 11.3%
- France: 7.9%
- Sweden: 6.6%
- Other countries: 36.6%

Import of Latvian furniture according to countries, %

- Poland: 28%
- Lithuania: 14.6%
- Italy: 14%
- China: 7.4%
- Estonia: 6.3%
- Other countries: 29.7%
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Products for Construction and Carpentry

The value of exported window, door and wood construction materials had increased by 12.8% in 2007 to LVL 63.8 million. Major investments have been made in developing modern carpentry products — wooden windows, doors, high-quality glued materials and even wood houses. Many companies have found money for modernisation of production lines from the European Union’s Structural funds. These developments have largely been stimulated by a rapid increase in the domestic construction market over the last several years. Timber products which are manufactured in Latvia and are destined for further processing, however, are finding their positions in Europe and the rest of the world. The competitiveness of this sector will largely depend on the ability of companies to form long-term relationships with resource providers and buyers of output.

Trends in the export and import of carpentry products, million LVL

Foreign trade partners for the sector of carpentry products, %

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Timber for Energy Production

The manufacturing of timber products that can be used for the production of energy is becoming increasingly important in Latvia — wood granules, wood chips for the production of heat, firewood and briquettes, etc. In 2007, the export of such products increased in value by 8.4% to LVL 99.9 million. This represented 9.8% of the sector’s total exports. There are also excellent prospects for the use of such products in Latvia. Latvia is a Nordic country, which means that a high proportion of timber that can be used for energy production is used specifically to produce heat, and the proportion of timber in Latvia’s overall energy balance, as a result of this, has already achieved a level of 24%. It has to be remembered, however, that many of the bio-energy resources that are out in the forest are wasted at this time – cutting scraps, many tiny saplings, the green mass and stumps. Major energy resources could be ensured if all of the above mentioned was used, and that would enhance the country’s energy independence. The state and local governments must work together to find a complex approach to these issues, because this can create a powerful energy sector, one that is based on the use of local renewable resources and also ensures new opportunities in terms of regional development. Optimal use of local renewable resources would mean that the proportion of fuel used for heat production that can be attributed to timber resources could increase from the current 24% to fully 45% of all consumption.

Significant work has been done in Latvia over the last several years to make sure that forestry scraps from main cutting areas can be used for heat production. In the future, the same will be true with respect to sanitary cutting and timber improvement cutting. The Latvian State Forests company delivers high-quality wood chips for heat production which comes from forestry work scraps. The company delivers these domestically and abroad. Most of the technically available forestry scrap resources (around 68%) are in privately owned forests, and it is thought that the total amount of such scraps is between 2 and 2.5 million m$^3$. Improvements to the technologies that are used to extract such resources from the forest would make it possible nearly to double the use of timber in the energy industry. Forest owners need to engage in better co-operation for this purpose, or they must find outsourced providers of the necessary services.
Before these resources can be put to optimal use, the entire system will have to be balanced out – extraction of the resources, transport and logistics, boilers, heating of homes, etc. There must be thought given to how those companies which produce heat can be encouraged to shift from fossil fuels to ones that are more environmentally friendly. The use of renewable resources in the energy resources largely has to do with the use of new technologies so as to replace traditional products such as firewood and wood chips with products that are easier to use and require less spending on transport and storage. This is fuel that comes from the biomass. It is equally important to strike a balance between the growing demand for energy produced from forest biomass on the one hand and the need for timber for the manufacturing of other types of products on the other.

**Structure of power timber import in Latvia in 2007 according to countries, %**

- Sweden: 39.3%
- Estonia: 26.3%
- Lithuania: 11.4%
- Finland: 10.1%
- Belarus: 4.1%
- Russia: 2.7%
- Germany: 2.6%
- Other countries: 3.5%

**Structure of power timber export in Latvia in 2007 according to countries, %**

- Sweden: 55%
- Estonia: 17.3%
- Finland: 16.5%
- Lithuania: 5.3%
- Belgium: 1.2%
- Poland: 1.1%
- Austria: 1%
- Norway: 0.8%
- Other countries: 1.8%

**Trends in the export and import of timber for energy production, million LVL**

**Other Products**

Manufacturing of other types of timber products which have a higher level of added value has also developed actively. This is seen in the increased proportion of this segment in the timber industry, as well as in the fact that there has been diversification in the types of products which are manufactured and then sent on for further processing. The sector which manufactures elements for wood buildings, for instance, saw exports increase by 34.6% in 2007. Small companies which specialise in various niche products also increased output and value of various products that were in demand in 2007 – garden furniture and equipment, wood toys, etc.
THE ENVIRONMENT AND SUSTAINABILITY

Climate Change

When Latvia’s forest management system is organised and improved, the role of the forest ecosystem in local and global processes is taken into account. This includes the absorption of carbon dioxide, the stabilisation of the circulation of that gas, preservation of biological diversity, and protection of bodies of water, the soil and the landscape. Throughout the world, forests are a very important resource in political and economic terms. They help to mitigate global climate change, and they also help to deal with the consequences of the changes that have already occurred. Latvia has undertaken the obligations of the Kyoto Protocol, and the absorption of carbon dioxide by forests and timber products has become increasingly important. The absorption of CO₂ can also be facilitated by intensifying forestry management so as to ensure that the amount of timber in the forest increases year by year. The most effective absorption of CO₂ occurs when the volume of timber increases to the greatest degree. Depending on the species of tree, this is true for trees up to the age of 60, after which time the absorption of carbon dioxide diminishes.

Thanks to the fact that wood processing companies have found the technologies which can be used to process younger and thinner timber, products with a high level of added value which also have the benefit of storing carbon for the long term can be manufactured. In those wood processing products in which carbon represents around 49% of the overall mass, it will be preserved as long as the product itself is preserved, and that helps to protect the environment. Longer cycles in forest circulation, for their part, will be ensured in protected territories and in forests which are used for economic purposes. This will involve waiting until trees become fatter before they are used for traditional timber processing purposes.

Certification of Forest and Timber Delivery Chains

Throughout the world, certification systems ensure sustainable and environmentally friendly forest management. In Latvia, the chains of forest management and timber product delivery are certified in accordance with the two most widely recognised certification schemes in the world – that of the Forest Stewardship Council (FSC), and the one called Programme for the Endorsement of Forest Certification Schemes (PEFC).

At this time, more than one-half of Latvian forestland, including all state-owned forests, have been FSC-certified, and management of such forestland occurs in accordance with internationally recognised standards on good management. The FSC certificate indicates that the forest is managed carefully, taking into account all environmental protection, social and economic interests. The FSC scheme also makes it possible to monitor the flow of forest products, starting from the forest and ending with the final consumer. The inspection of timber delivery chains is a precise and independent process. More than 100 companies in Latvia’s forest sector have certified their timber flow registration systems. Latvia’s national PEFC scheme is still being improved.
Protected territories

Large parts of Latvia’s forestland have been declared as protected zones so as to preserve and defend natural values. This includes various reserves, restricted natural areas, and other protected territories. Some of the specifically protected natural territories and micro-reserves are part of the Natura 2000 programme, which focuses on protected territories of a pan-European importance. The Natura 2000 programme was set up to protect endangered habitats, species and sites for such species. Of the species and biotopes that are listed in the relative directive, Latvia is home to 20 species of plants, 20 of invertebrates, five of mammals, three of reptiles, 11 of fish, and 70 of birds, as well as 60 types of habitats. The Natura 2000 network in Latvia covers 336 territories which cover fully 11.9% of Latvia’s territory – four nature reserves, four national parks, 250 restricted areas, 37 nature parks, nine areas of protected landscapes, nine natural monuments, and 23 micro-restricted areas. These territories have different rules as to protection and management. There are minimal limitations in those areas which have been established to protect landscapes, but there are complete bans on any type of economic activity in nature reserves and micro-restricted areas.

Limitations on economic activity in those forests which are primarily meant for environmental protection are essentially a public service that is provided by the relevant forest owners. A system of compensation has been set up for those owners who suffer losses because of the limitations on economic activity, although the system is not yet completely in place. The fact is that the timber industry, which contributes a great deal of tax revenue, can finance the maintenance of protected areas of forestland, but this source of financing will be possible only if the relevant industries have a sufficient base of resources.
Concern for the Environment in the Industry

Environmental requirements in Latvia’s timber industry are regulated by the Cabinet of Ministers. Moreover, companies in Latvia, like organisations throughout the world, are increasingly likely to take voluntary steps to reduce the negative effects of manufacturing on the environment as much as possible. Because environmental sustainability is a factor to which clients, too, are devoting increasing attention, this is an approach which makes it possible to increase the added value of the relevant products.

The government’s regulations which are obligatory for all wood processing companies focus on such issues as the environmental effects of sawmills and wood processing equipment, as well as environmental requirements related to the chemical protection of timber. Sufficient extraction fan ventilation and air purifications through cyclones or filters makes it possible to ensure that wood dust that occurs during the wood processing process does not end up in the environment. Failure to observe these requirements means that chemical timber processing resources that are used to impregnate timber may end up leaching into the soil and subterranean groundwater.

Timber companies in Latvia have been investing greater resources in the purchase of more modern wood processing equipment – equipment which satisfies all of the relevant requirements from the very beginning. The more serious companies have a systematic approach to dealing with environmental issues. They constantly improve environmental management processes, and this is becoming an increasingly important factor in terms of competitiveness at the national and the international level. Many wood processing companies in Latvia have organised independent environmental management system certification in accordance with the internationally recognised ISO 14001 standard. This adds value to the organisation’s activities and makes them more attractive to those business partners which are concerned about the environment. Companies design detailed quality management systems in accordance with ISO requirements, and their aim is to prevent any mistakes in technological processes. This means that products are manufactured in accordance with defined requirements, and the waste of resources is prevented to a maximum degree. Before new products are introduced into the market, they are carefully examined in accordance with client demands, as well as the standards which prevail in the industry.
DIALOGUE WITH THE PUBLIC

Public opinion surveys have found that the people of Latvia think very highly of the forest as an ecosystem, a place for rest and recreation, and a way of ensuring a pleasant living environment. People are more aware of the fact that timber products are environmentally friendly and offer various advantages. At the same time, however, there is still mostly negative attitude towards work in forest industry and the preliminary processing of timber. People often lack comprehension of complete cycle of circulation for timber. That is why the forest sector continues to be engaged in the area of public information, distributing additional and useful facts about the timber circulation cycle, its importance for the national economy, its role in ensuring the circulation of carbon, and its significance in preserving the valuable aspects of the forest.

Facilitating the Use of Timber

Serious work on promoting the use of timber and on educating the public about this began when the “Green Homes” association was established. It works with other interested organisations in helping to facilitate the use of timber products. The organisation has conducted a survey which found that 85% of respondents, when choosing building materials, consider how environmentally friendly they are and feel that timber is a diverse material with widespread opportunities of use. 31% of respondents say that they would use timber materials more if they had access to more extensive information about the material’s positive properties.

In order to promote the development of the domestic market for timber products and to increase the use of such products, there must be major efforts to educate architects, designers and the public at large. The use of timber in the construction of public buildings is an important way of enhancing this understanding, and so state and local government procurement officers should be encouraged to use timber more extensively. That would allow Latvia’s forest sector to become part of overall European developments at an equal level of competitiveness.

One of the main innovations in the regulation of public procurement in Europe is that legal foundations have been created for “green procurement.” A directive on public procurement now says that clients and public service providers have the right to insist on environmental requirements in procurement proceedings. In many countries, this has been used to demand the use of renewable resources in the construction of public buildings.

The Sector for Leisure and Recreation

More than 300 different leisure facilities can be found in Latvia’s forests. These are open to everyone, and their number is increasing each year. Latvian State Forests (LSF) has created facilities such as viewing towers, information trails, cultural and historical objects, picnic sites with all of the necessary infrastructure, and well-appointed facilities of other kinds, and these are becoming more and more popular. LSF has created a brand name in support of the movement focused on leisure in Latvia’s environment so as to bring the people of Latvia closer to nature and to encourage people to learn more about the primeval beauty of the natural world in their country. The brand name is “Mammadaba” (Mother Nature), and the relevant Internet Webpage offers a database of information which will offer ideas about weekend plans outdoors. The homepage include information about what can be done in the forest, as well as detailed descriptions of various possible trips. There’s a set of maps of Latvia’s various regions, a calendar of events, and a list of the favourite facilities for tourists. For active travelers, “Mother Nature” offers several new and exciting tours which have been developed by Imants and Rimants Ziedonis.

Many people from Latvia and abroad enjoy the educational trails in the forest which the State Forest Service has set up in many parts of Latvia. These offer information and education for private owners of forestland, students, environmental specialists and historians. The forest trails will inform visitors of processes which take place in forest, as well as of fundamental principles in forest management. The most interesting attractions include forested areas on land that is not used for agriculture, outstanding stands of trees, natural forest biotopes, cultural and historical objects, as well as the homes of forest animals – the caves of badgers or the stacked wood of beavers. Objects related to leisure and entertainment offer attractive elements and games which are meant particularly for schoolchildren and for families with children. In arranging these leisure facilities, the State Forest Service, Latvian State Forests, SIA Rīgas Meži, the country’s national parks, and other managers of forestland all focus in particular on making sure that the objects are interesting and exciting for kids.
Information and Education for the Public

The education and involvement of the public are also part of annual Forest Days events. Each year this involves the planting and cleaning up of forestland. Birdhouses are put up, important locations of a cultural or historical nature are cleaned up, there are all kinds of competitions for schoolchildren, lectures are delivered, seminars are organised about forestry issues and protection of the forest, new leisure facilities are added and existing ones are spruced up, and there are many other events. Forest Days events take place in Riga and throughout Latvia. The programme is co-ordinated by the Agriculture Ministry, and participants include relevant government institutions, public organisations, local governments, as well as forest owners and timber industry companies. Volunteers number in their thousands – schoolchildren, university students, hunters, photographers, birdwatchers, people who enjoy fishing, musicians, artists and many others who love the forest and the environment.

The Forest Days programme celebrated its 80th anniversary in spring 2008. The first one took place in Varakļāni town in 1928, and that's where the 80th anniversary event was held, too. Minister of Agriculture Mārtiņš Roze with representatives of the forest sector joined to plant linden trees in the park of the Varakļāni Castle. Throughout the day there was an extensive programme in the castle and its surrounding park – creative workshops where people could learn about the forest through colour, sound and emotion, a market, an exhibition about the history of Forest Days, the presentation of a new book about that history, performances by a brass band from Madona and several other groups, as well as a concluding concert in the central square of the castle. There was also one unprecedented event – more than 500 employees of the forest sector came together to plant many, many trees not far from town.

There were more than 400 events related to the forest during the anniversary year, and tens of thousands of Latvian residents took part. These various events were organised by the State Forest Service, Latvian State Forests, SIA Rīgas Meži, the Latvian Association of Local Self-Governments, the Forestry Faculty of the Latvian Agricultural University, the Latvian Timber Industry Federation, forest owners, and other organisations and companies from the sector.

Work on public education and information is an ongoing and systematic process in Latvia's forest sector. One of the most widely noticed activities is called “Don't Dump Garbage in the Forest!” There's a promotional image for this programme known as Pigman, and the character has become very recognised and popular. This helps to attract society's attention to the problem of garbage that is dumped in forests and roadsides.

The Forest Development Fund has also supported extensive public information campaigns about the forest sector as such, including the use of timber products in various areas of life.
Support for the Development of the Forest sector

The Forest Development Fund

The aim of the Forest Development Fund is to finance programmes aimed at supporting and developing the forest sector, at conducting scientific research in the forest, and at educating and training forest owners. The fund’s resources are based on a government subsidy from overall revenue, donations from individuals and companies, as well as foreign assistance. The fund is controlled by the Agriculture Ministry and its Forest Development Fund Council. The resources of the fund are administered and supervised by the Rural Support Service.

The consulting council that was established by the Agriculture Ministry in relation to the Forest Development Fund works to make sure that there is transparency in the spending of the fund’s resources, that public interests are taken into account in the distribution of finances, and that the public can take part in the taking of the relevant decisions.

The functions of the fund’s secretariat are also handled by the Agriculture Ministry. Information about the Forest Development Fund and the projects which it finances can be found on the ministry’s homepage, www.zm.gov.lv, under “Forest Sector.”

The Hunting Development Fund

The Hunting Economy Development Fund was established under the auspices of Latvia’s law on hunting. This fund, too, is controlled by the Agriculture Ministry, and the resources are used to monitor game animals, to protect their population, to conduct scientific research of game animals and their populations, to take part in international hunting organisations, and to educate hunters. Information about the Hunting Economy Development Fund and the projects which it finances can be found on the ministry’s homepage, www.zm.gov.lv, under “Forest Sector.”

Education and Science

When new technologies are introduced in the forest sector, there is an increasing need for qualified employees and for scientific research focused on the manufacturing of new products. The educational system in the forest sector is a leader in the development of professional standards in comparison to other areas of the economy, but the fact is that the professional education is rather scattered, and educational programmes are lagging behind developments in the sector itself. The main challenge in this area, therefore, is to ensure quick and successful combinations of the opportunities which businesses and educational institutions have in terms of training necessary specialists. Resources have to be found for the ongoing training of employees and for improving the quality of professional education. Of absolute importance will be co-operation between the professional educational system and the industry so as to set up skills centres at which people can be trained in the use of the latest technologies. A project that is completely new for Latvia has been launched. It develops training programmes which help to provide practical training for employees in the sector on the use of the latest technologies.

There are nine priorities in the area of fundamental and applied research during the period from 2006 and 2009. The national government has awarded resources for the development of new products and technologies, and that is one of those priorities. Latvian State Forests has also invested in scientific research aimed at improving the natural, social and business environment in the forest. Scientific research in the forest sector and its related sectors is largely centred in three research facilities – the Latvian state forestry institute “Silava,” the Forestry Faculty of the Latvian Agricultural University, and the Latvian State Institute for Timber Chemistry. There are other types of scientific research and educational work in other EU member states, and Latvia has started to work on the introduction of new and more effective scientific research structures, particularly in the area of applied research. The sector demonstrated initiative in establishing the Forest and Timber Product Research and Development Institute, which does research work on commission from the sector. There has also been work on merging research capacities in support of the creation of new products in Latvia.

There are several environmental protection organisations which help to study biology and ecology in the forest – WWF Latvia, the Latvian Nature Fund and the Latvian Ornithology Association. Various enthusiasts in the area of environmental protection are brought into this work. Resources are received from various international foundations which fund research projects. Money has also been received from foreign and Latvian organisations and enterprises. The capacity of scientists in the Latvian forest sector is largely based on their ability to be involved in European and other international research programmes. Scientists from Latvia also take part in several European scientific co-operation projects.
THE “GOLDEN PINE CONE” FOREST SECTOR AWARDS

For the fourth year in a row, the “Golden Pine Cone” forest sector awards ceremony was held early in 2008. The “Golden Pine Cone” represents the highest recognition for achievements in the forest sector. It was established by the Agriculture Ministry in tandem with a series of state and public organisations from the sector. The awards are presented in four categories – “Lifetime Achievement,” “Sustainable Management,” “Innovative Business,” and “Public Education.” Achievements among specialists were evaluated in two rounds. First they were assessed by experts, and then they were considered by the Forest Days committee, which determined the winners. The aim of the “Golden Pine Cone” awards is to promote the development and public importance of the forest sector.

In 2008, “Golden Pine Cone” awards for lifetime achievement were received by Osvalds Cinītis, Aija Fišere, Juris Mafīss, Andrejs Nikulcevs, and Jānis Elmārs Rubens.

Osvalds Cinītis has spent his entire career in the forestry industry. After completing his university studies, he became a specialist in a forestry district. Later he was a forester and the director of a forestry unit. At the Forestry and Forest Industry Ministry in Soviet times, he was responsible for forest restoration, selection work, land reclamation and road building. Until his retirement, Osvalds worked for the Environmental Protect Committee and the National Environmental Inspectorate. He was very energetic and purposeful, and he made serious demands against his employees and subordinates. Osvalds Cinītis is known as a key authority among forest specialists. He has always been active in public and cultural life. He founded the “Silvicola” men’s choir of forestry workers and served as its president for many years.

Aija Fišere is a well known forester who has worked as an assistant forester in a forest unit, as an engineer in regional structural units, and at various posts in the relevant ministry, where at one point she directed the drafting of all normative acts related to forest management. Representatives of the forest sector often contact Aija Fišere for her advice.
Juris Matīss was graduated from the Forestry Faculty in 1955 and began work as an assistant to a forest assessor. Juris helped to introduce several modern technologies while he worked in the forestry industry, from aerial photography to the use of electronic calculators. He also took part in projects aimed at forest planting, at drafting rules concerning protected forests in Latvia, and at ensuring the gentle use of the forest. Juris Matīss has been an active participant in preparing regulations on private forest inventories and the relevant forest management plans.

Andrejs Nikuļcevs spent his 44-year career in the timber industry, helping to develop it as a sector. He worked at the Lignums and Latvijas Bērzs companies as their director, as well as at Latvijas Finieris, where he organised many technological innovations which allowed the company to achieve excellent manufacturing indicators.

Jānis Elmārs Rubens spent 55 years in the forest sector, starting as a forest master and eventually “growing up” to become the first deputy minister for forestry and the forest industry. He managed processes related to the modernisation of forestry technologies and improving the way in which the relevant work was organised. Jānis Elmārs is an authority among forestry workers both in Latvia and in other countries. Today the level of forestry work in Latvia is close to the level in Scandinavia, and that can be said to be the result of a lifetime of hard work by Jānis Elmārs Rubens. Since the restoration of Latvia’s independence, he has initiated several changes in the forest sector’s system, separating the state’s functions (legislation, supervision) from economic functions.
Four companies were nominated in the “Innovative Business” category – SIA Bolderāja Serviss, SIA Troja, SIA Raiju, and SIA Nelss. The “Golden Pine Cone” went to SIA Nelss, which is one of Latvia’s largest timber industry companies. It has focused on modern and innovative manufacturing from the very beginning. In the market for timber products, SIA Nelss is among the leaders in terms of wood construction materials. In 2006 and 2007, Nelss invested a total of LVL 14 million in its further development, with some of that money coming from the European Union’s Structural Funds. After investing in new technologies, SIA Nelss became one of the most modern companies in the timber industry. It uses no-waste technologies and a fully automated manufacturing process. Thus its factory is one of the leaders in its field in all of Northern Europe.

Nominees in the “Public Education” category were Jānis Aļļis, Jānis Ence and Inese Iesmiņa. The prize went to Inese Iesmiņa, who has worked for a preschool educational institution, “Mežmaliņa,” for the last 19 years. During the last six years, the teacher has particularly focused on field trips for the children, bringing parents into the process, too. She has also designed very interesting methodological materials. Inese and her enthusiasm have influenced other teachers who also now teach children to study, view, compare, evaluate and experience nature and all of its changes over the course of the seasons of the year.

There were also three nominees in the “Sustainable Management” category – Agris Āboliņš, Juris Jefimovs and Jānis Vazdiķis. The “Golden Pine Cone” went to Agris Āboliņš, whose motto is “The Forest is in My Soul, and My Soul is in the Forest.” In the area of forest management, Agris manages to strike a balance between environmental protection and economic interests. He inherited some forestland from his grandfather, and he has expanded his holdings to properties in the Ventspils District which cover fully 233.2 hectares. Agris has been active in the group which supervises the restricted natural area known as “Glass Swamps.” In 2006, with the help of money from the European Union’s Structural Funds, he restored 25 hectares of forestland which had suffered serious storm damage.
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