REPUBLIC OF ESTONIA
MINISTRY OF CLIMATE



Facilitative Multilateral Consideration of Progress Estonia

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Key facts and figures



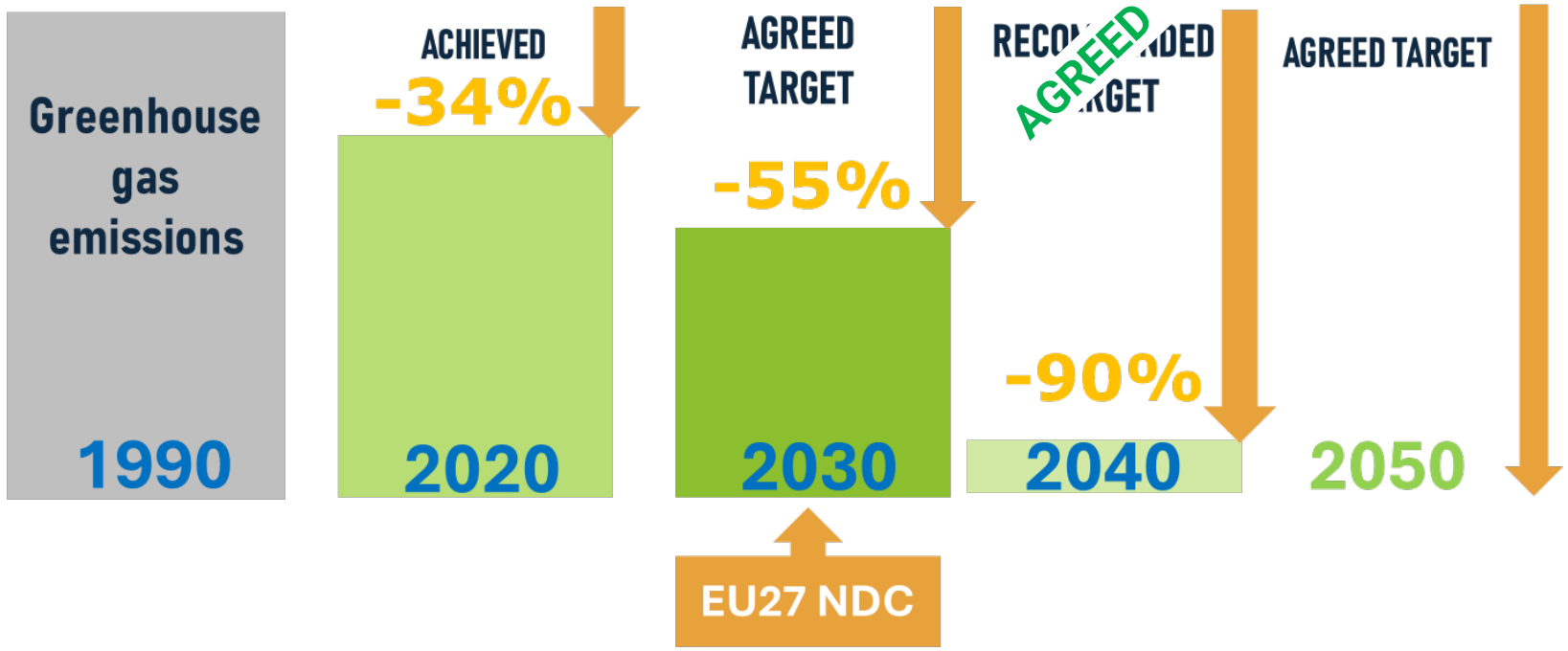
SURFACE AREA: 45 339 km^2 – 52% forest, some 2 300 islands

POPULATION: 1 365 884 (0.3% of EU27)

STRUCTURE OF ECONOMY: services close to 70% of value added, industry around 20%;

CLEAN AIR: one of seven countries meeting WHO air quality standards in 2024

EU's pathway to climate neutrality

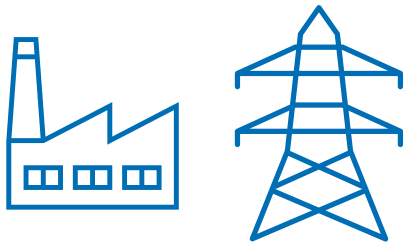


- EU Climate Law: at least 55% lower net GHG emissions by 2030 and net zero by 2050.
- 2035 NDC: indicative 66.25–72.5% economy-wide net domestic GHG reduction, towards 90% net reduction by 2040.

Estonia's contribution to the EU's NDC

EU Emissions Trading Systems (ETS)

- **EU 2030** target compared to 2005: – 62%
- No national targets



Effort Sharing Regulation (ESR)

- **EU 2030** target compared to 2005: –40%
- **Estonia's 2030** target compared to 2005: –24%



Land Use, Land Use Change and Forestry (LULUCF)

- **EU 2030** target: 310 million tonnes of net removals
- **Estonia's 2030** target: 0.43 million tonnes of additional removals compared to 2016–2018 average



Estonia's national climate and energy targets

GHG emission reductions

- **Net emissions to zero by 2050**
- Emissions in the Effort Sharing Regulation sectors in 2030: **–24% compared to 2005**
- In the Land Use, Land-Use Change and Forestry (LULUCF) sector, net removals in 2030 must increase by **0.434 million tonnes of CO_2 equivalent compared to the 2016–2018 average**

Renewable energy

- By 2030, at least **65% of total final energy consumption** must come from renewable energy sources:
- **100% of total final electricity consumption**
- **At least 63% of total final heat consumption** from renewable energy
- **The share of renewable transport fuels in road and rail transport** in accordance with the requirements set out in the Renewable Energy Directive.

Energy consumption

- Final energy consumption must remain at **29.4 TWh per year until 2030**.

The **cumulative energy savings obligation for the period 2021–2030** amounts to **21.28 TWh**.

Primary energy consumption must decrease by up to 48% by 2030 compared to the peak consumption in recent years (2016 = 69.8 TWh), meaning that **primary energy consumption in 2030 must not exceed 36.5 TWh**.

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Climate policy in Estonia

Policy Fundamentals: policy vision, national target, priority development trends

General Principles of Climate Policy until 2050

Cross-sectoral strategies

Long-term development strategy
"Estonia 2035"

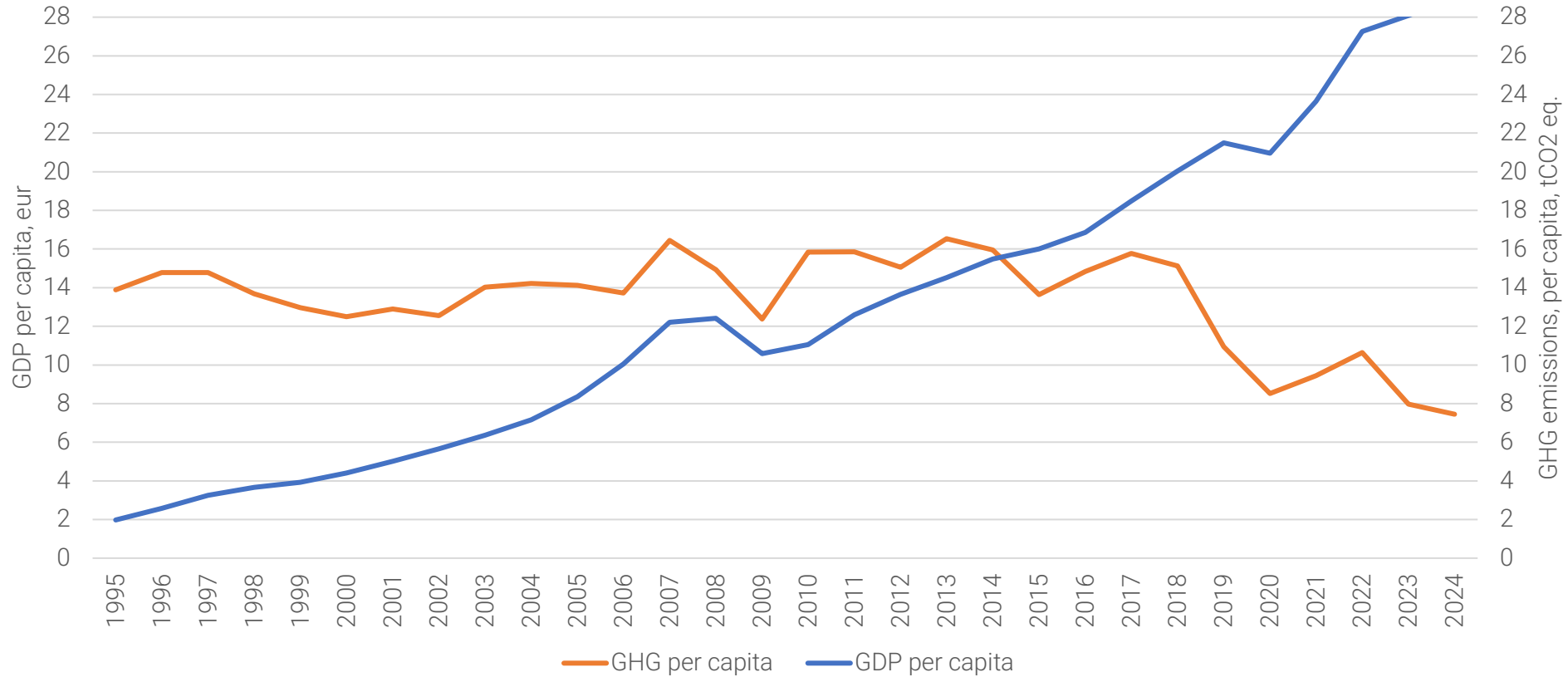
Sectoral strategies: objectives and sub-objectives of the policy area, indicators, policy instruments

National development plans

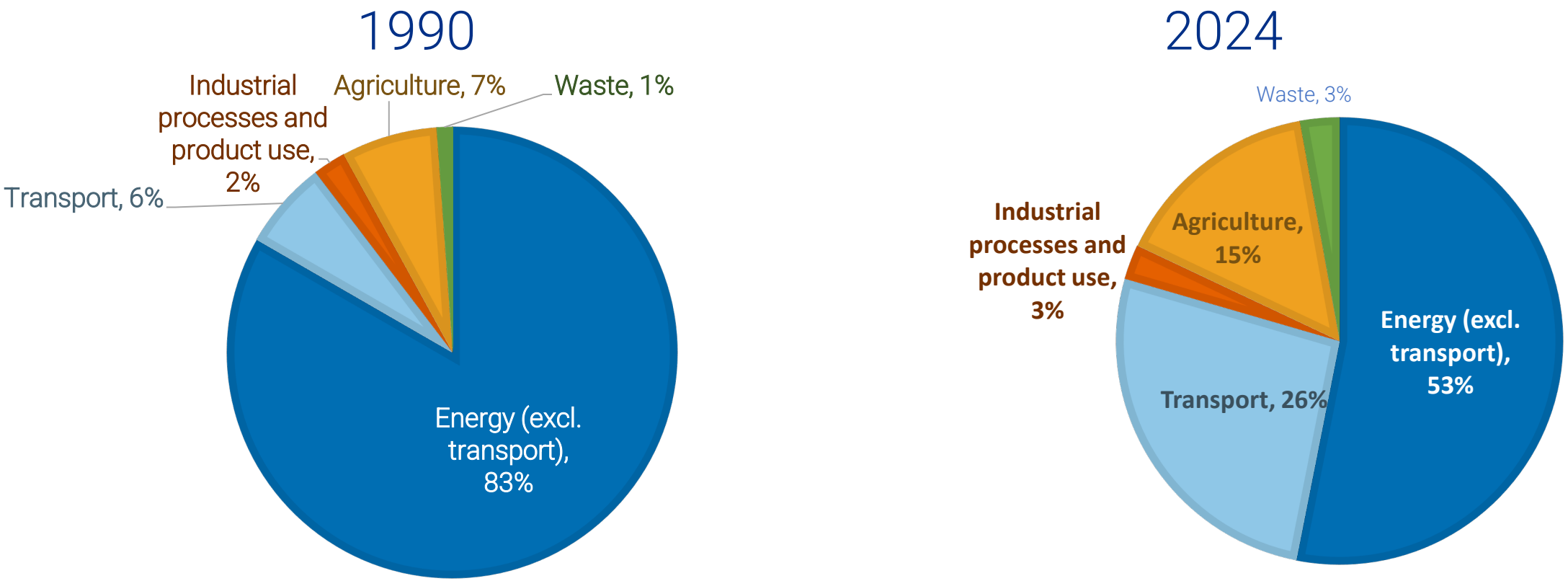
Examples: Estonian Energy Development Plan, Transport Development Plan, Agriculture and Fisheries Development Plan, Estonian Forestry Development Plan, National Waste Management Plan

Implementation plans: measures, metrics, activities, financing

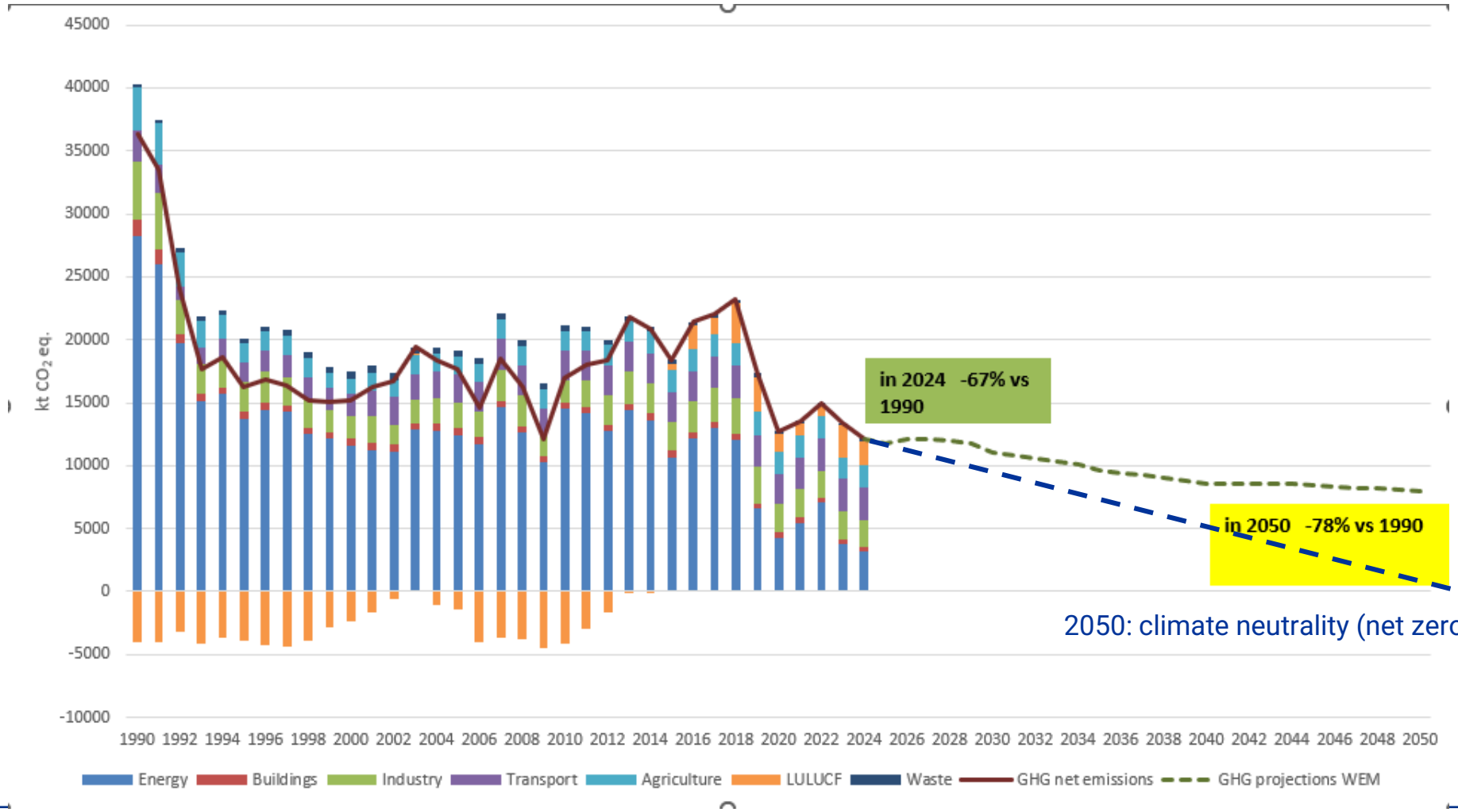
Decarbonisation and economic growth in Estonia



GHG emissions by sector, 1990 and 2024



Estonia's greenhouse gas emissions are falling



Climate policy in practice

Key measures and sectoral roadmaps

Examples of progress and international cooperation

Sectoral roadmaps – ensuring progress towards climate neutrality

Sectoral targets for 2030, 2035 and 2040 are defined in sector-specific roadmaps.

Clear direction: Roadmaps set sectoral emission reduction targets and identify key measures to achieve them.

Regular review: Roadmaps are regularly reviewed and updated in cooperation with stakeholders.

Flexibility: Updates reflect technological developments, economic conditions and progress in emission reductions.

Long-term ambition: This approach ensures that Estonia remains on track towards climate neutrality by 2050, while allowing flexibility in how targets are achieved.

Estonia's key measures for climate neutrality

- Clean energy transition with renewables, storage and stronger grids. Building nuclear energy capabilities
- Peatland restoration to reduce emissions from drained soils
- Making transport more environmentally friendly- Rail electrification and cleaner public transport
- Resource-efficiency grants to cut material and energy use
- Renovation grants for energy-efficient homes and cleaner heating
- Just transition principle for the transition to climate neutrality

Success stories

CLEAN ELECTRICITY

Installed capacity: 2020 to early 2025

Solar: >12-fold growth

≈100 MW to >1.2 GW

Wind: more than doubled

≈320 MW to ≈700 MW

68% renewable share of Estonia's electricity generation in 2025

200 MW / 400 MWh

Kiisa and Aruküla battery parks, 2026

One of continental Europe's largest battery storage complexes

Supports grid stability and renewable energy integration

CIRCULAR ECONOMY

Waste replaces fossil fuels

Estonia produced approximately 0.31 TWh of biomethane in 2025. Fuel from waste and agricultural residues replaces fossil gas in transport.

Keeping materials in use

Estonia's deposit-return system collects around 90% of covered beverage containers for recycling, reducing demand for virgin materials.

CLEAN TECHNOLOGIES

Clean energy manufacturing

Elcogen's new factory in Estonia opened in 2025, expanding fuel-cell and electrolysis component manufacturing capacity from 10 MW to 360 MW.

Resilient power grids

Estonian-founded Skeleton supplies fast-response energy storage to international grid technology providers.

Support for developing countries

- **Climate finance**
- **Technology development and transfer:** Technology development and transfer support focused on piloting, deploying and scaling up technologies in energy, agriculture and waste sectors.
- **Capacity building:** Capacity-building support focused on training, awareness raising and knowledge sharing in agriculture, energy, waste and disaster preparedness.



Where support goes: Ukraine, the Eastern Partnership, Africa and Central Asia



Over four-fifths of support is cross-cutting: most projects have both mitigation and adaptation elements



Peer-to-peer training and institution building

Concluding remarks

Substantial emission reductions. Estonia's net greenhouse gas emissions in 2024 were around 67% below 1990 levels.

Climate policy in practice. Estonia is advancing the clean energy transition through renewables, storage and stronger grids, alongside measures for greater energy efficiency and cleaner transport.

A clear long-term direction. Estonia continues to work towards climate neutrality by 2050 and a knowledge-based economy that supports a high-quality living environment. This transition requires the engagement of all sectors and stakeholders.

International contribution. Estonia supports climate action in developing countries through voluntary climate finance, technology cooperation and capacity building.



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Thank you