

The Environmental Implementation Review



Estonia

Environmental Implementation Review 2025

Estonia has abundant forest and water resources and large fossil fuel reserves. Estonia has made good progress in reducing environmental pressures.

Environmental concerns are growing over the anchorage of ships awaiting entrance to Russian ports in Estonia's exclusive economic zone. Anchoring in these waters has increased after the sanctions and increased shipping traffic with Russia, Estonia has little legal options to block entrance of ships under the flags of third countries.

Highlights



Estonia is now on track to decouple municipal waste generation from economic growth. It has made slow but steady progress over the past decade in stepping up its recycling rate.

There is some progress in promoting zero-emission road transport solutions and in renovation of the building stock to combat climate change.

Main Challenges



Circular Economy

Resource productivity in Estonia is dragged down by resource intensive industries. In 2023, Estonia generated EUR 0.63 per kg of material, against the EU average of EUR 2.22.



Pollution

Although the emissions of key air pollutants have decreased significantly over the last years, Estonia should continue to address emissions to air from usage of fossil fuels and other emitting sources replacing them with cleaner solutions.

An infringement procedure has been open against Estonia since February 2024 for non-compliance with the requirements of the Directive in respect of discharges of industrial waste water into urban waste water treatment plants.

Governance and investment



To meet its environmental objectives beyond climate change, the additional investment needed (the investment gap) is an estimated EUR 0.8 billion per year in Estonia, around 2.18 % of the national GDP, higher than the EU average (0.77 %).

On environmental governance, Estonia provides an example of good joint application of the Environmental Liability and Industrial Emissions directive, for cases where environmental damage is caused by an operator acting under the IED permit. Nevertheless, Estonia needs to ensure legal standing and better access to courts for the public concerned.

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