

EXPORT PRACTICES AND MARKET ORIENTATION

of Slovenian wood and furniture companies

Matej Jošt · Leon Oblak · Jože Kropivšek · Luka Goropečnik · Anton Zupančič · Teja
Bizjak Govedič · Bernard Likar · Erika Valentinčič



UNIVERZA
V LJUBLJANI

BF

Biotehniška
fakulteta

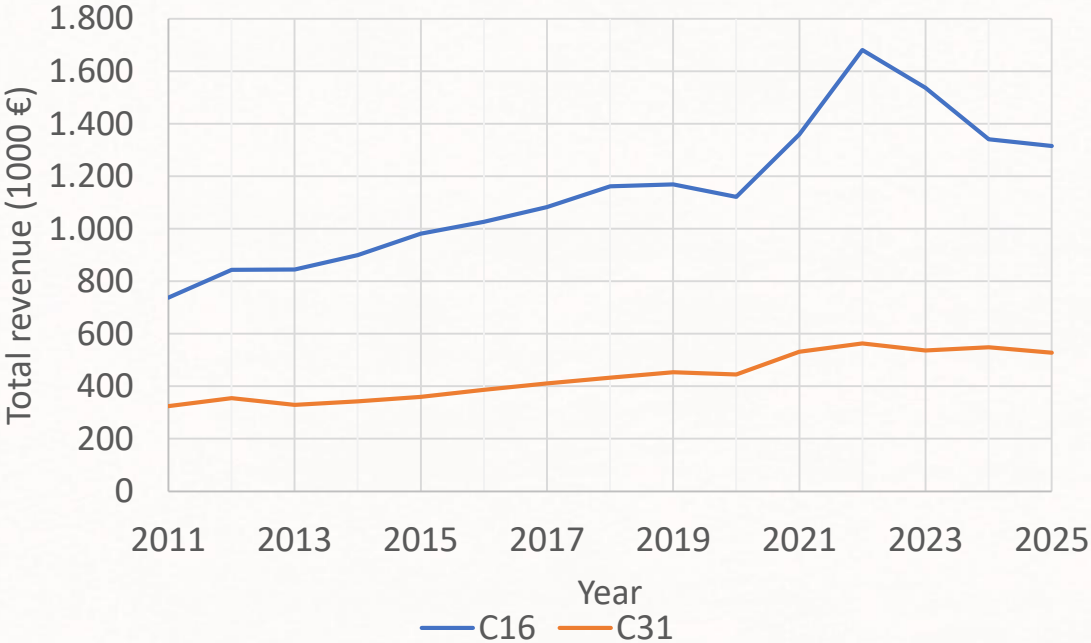


arrs
SLOVENIAN RESEARCH AGENCY



REPUBLIKA SLOVENIJA
MINISTRSTVO ZA GOSPODARSKI
RAZVOJ IN TEHNOLOGIJO

Total revenue



0,5 M€

2025
C31

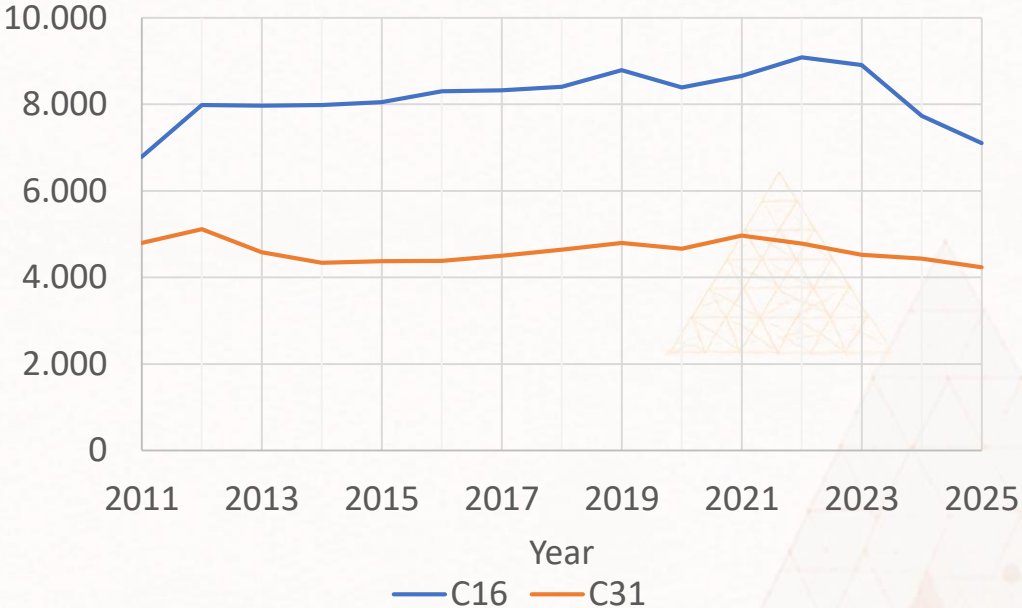
1,3 M€

2025
C16

1,8 M€

2025
C16 + C31

Number of employees



4,2 k

2025
C31

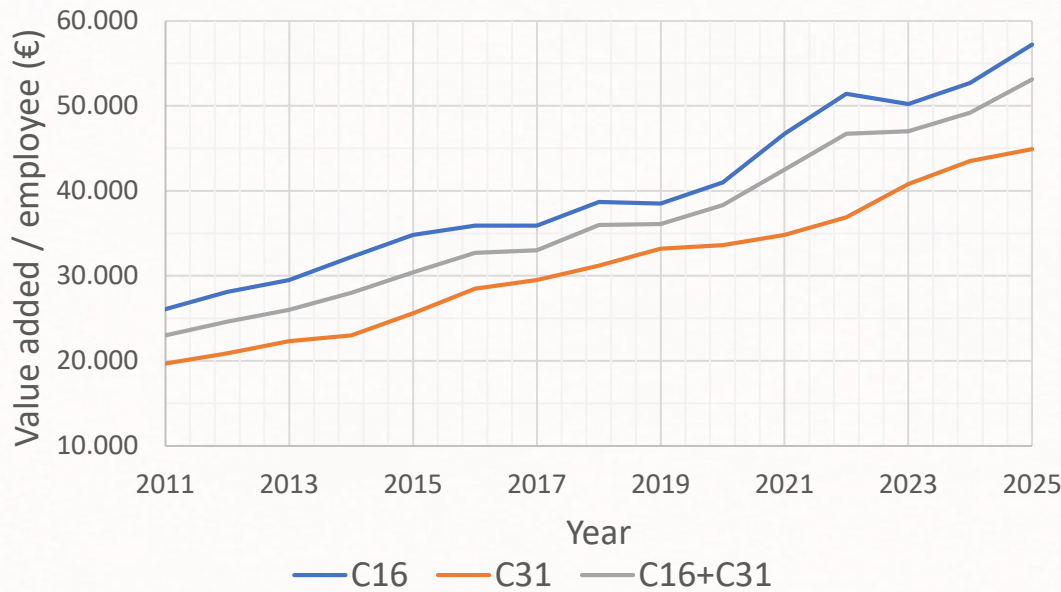
7,1 k

2025
C16

11,3 k

2025
C16 + C31

Value added per employee



45,2 k€

2025
C31

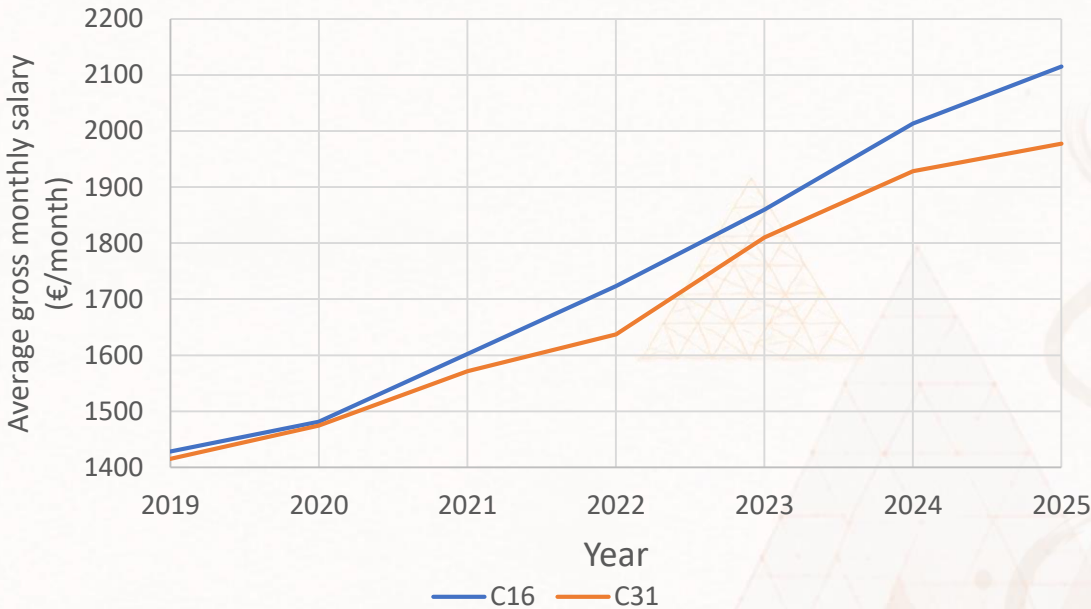
57,8 k€

2025
C16

53,3 k€

2025
C16 + C31

Average gross monthly salary



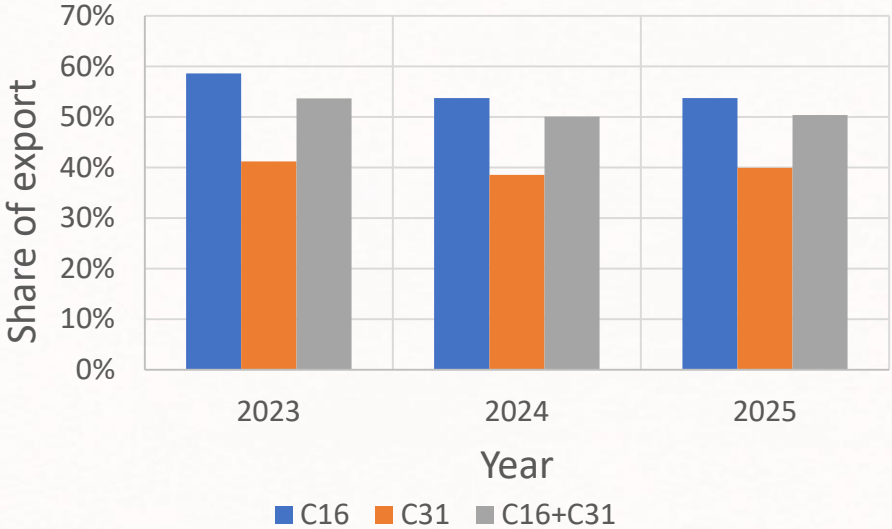
1.977 €

2025
C31

2.115 €

2025
C16

Share of export



39,9%

2025
C31

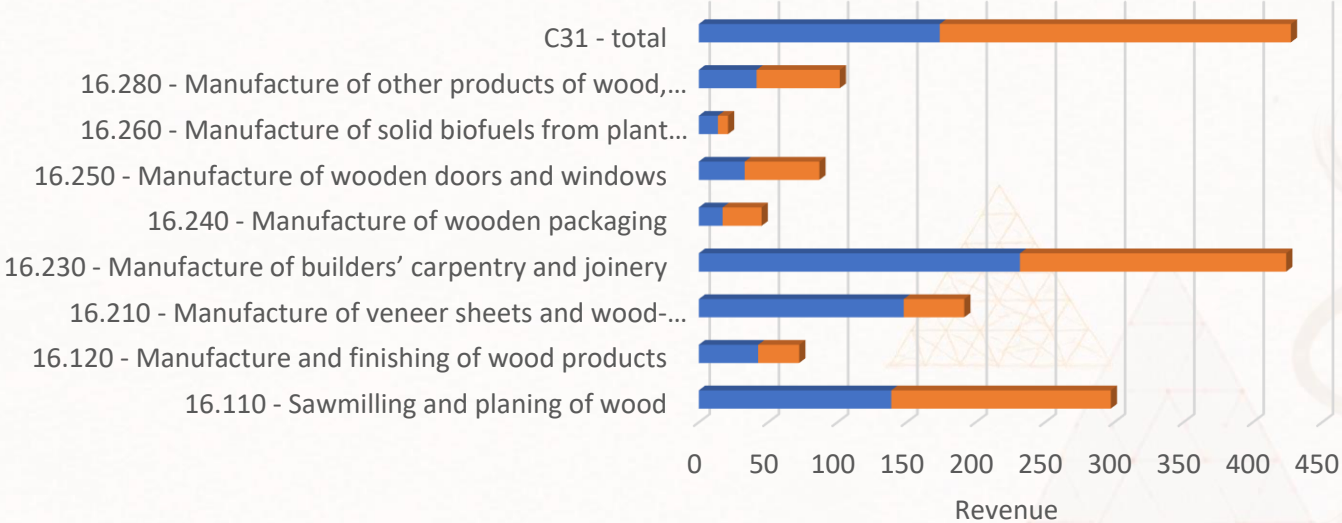
53,7%

2025
C16

50,4%

2025
C16 + C31

Detailed revenue /export in 2025



Export Home

↓ 37,9%

16.240
Wooden packaging

↑ 77,2%

16.210
Veneer and panels

source: GZS

External shocks

Energy crisis · inflation · weaker demand · logistics disruptions

Research question and analytical lens

How are established Slovenian exporters positioned internationally?

WHERE?

Current and target markets

WHAT?

Product structure and
export intensity

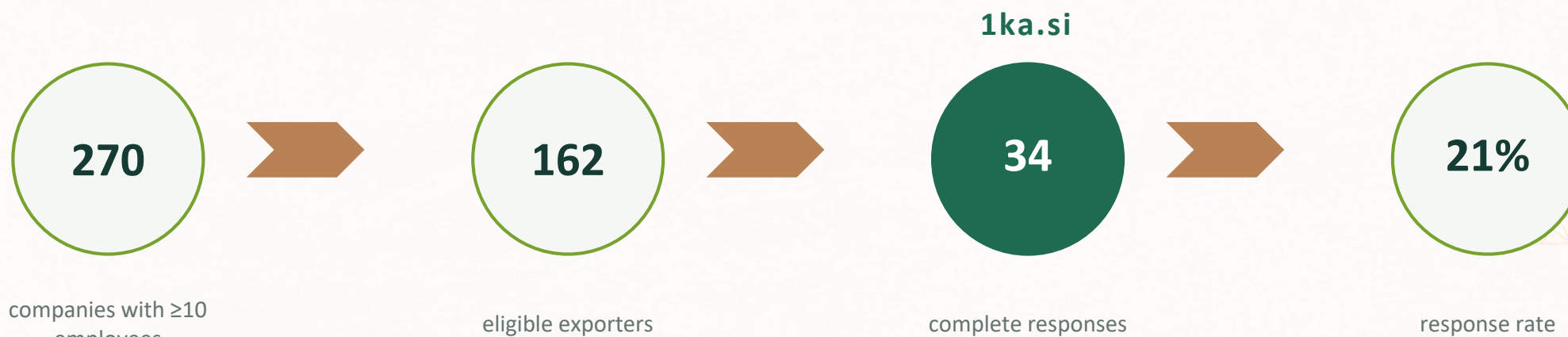
WHY /
WHY NOT?

Drivers and barriers

HOW?

Competitive advantages

Methodology



ONLINE SURVEY · FEBRUARY–MAY 2026

Eligibility: ≥ 10 employees and $\geq 10\%$ of revenue from exports

41% Furniture

Export geography: Europe first, diversification emerging

Core export base

EUROPE

Austria · Germany · Italy
Switzerland · UK · Croatia

Additional markets

MENA

UAE · Egypt · Algeria

NORTH AMERICA

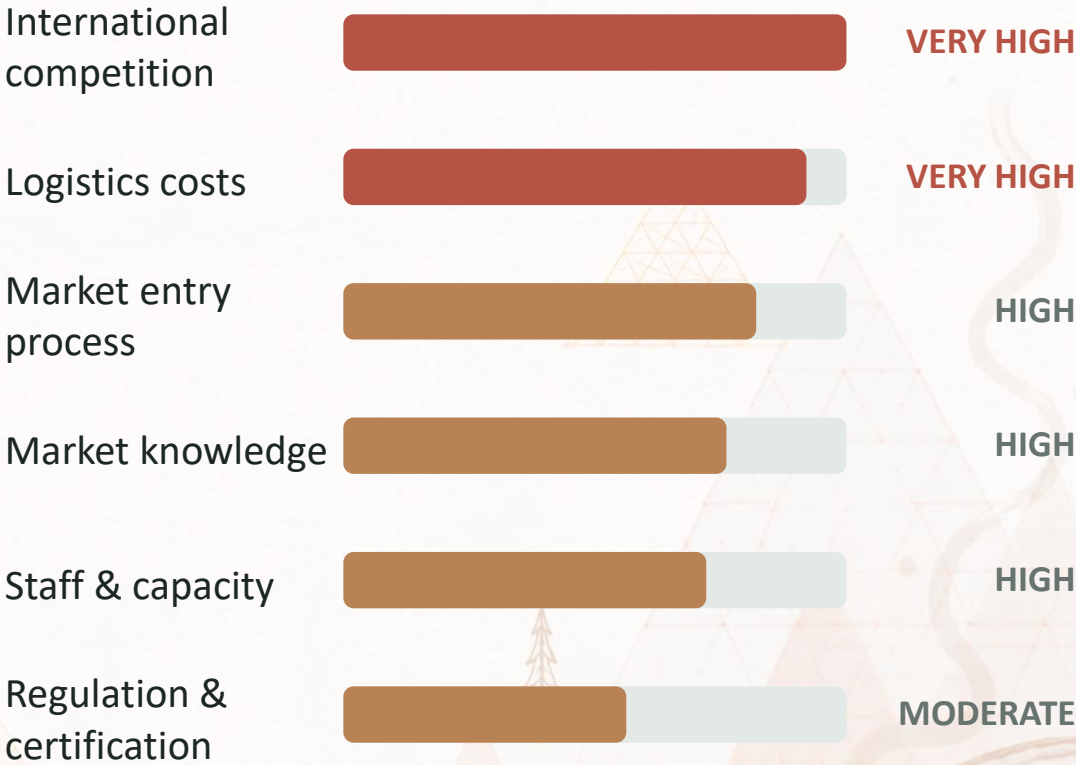
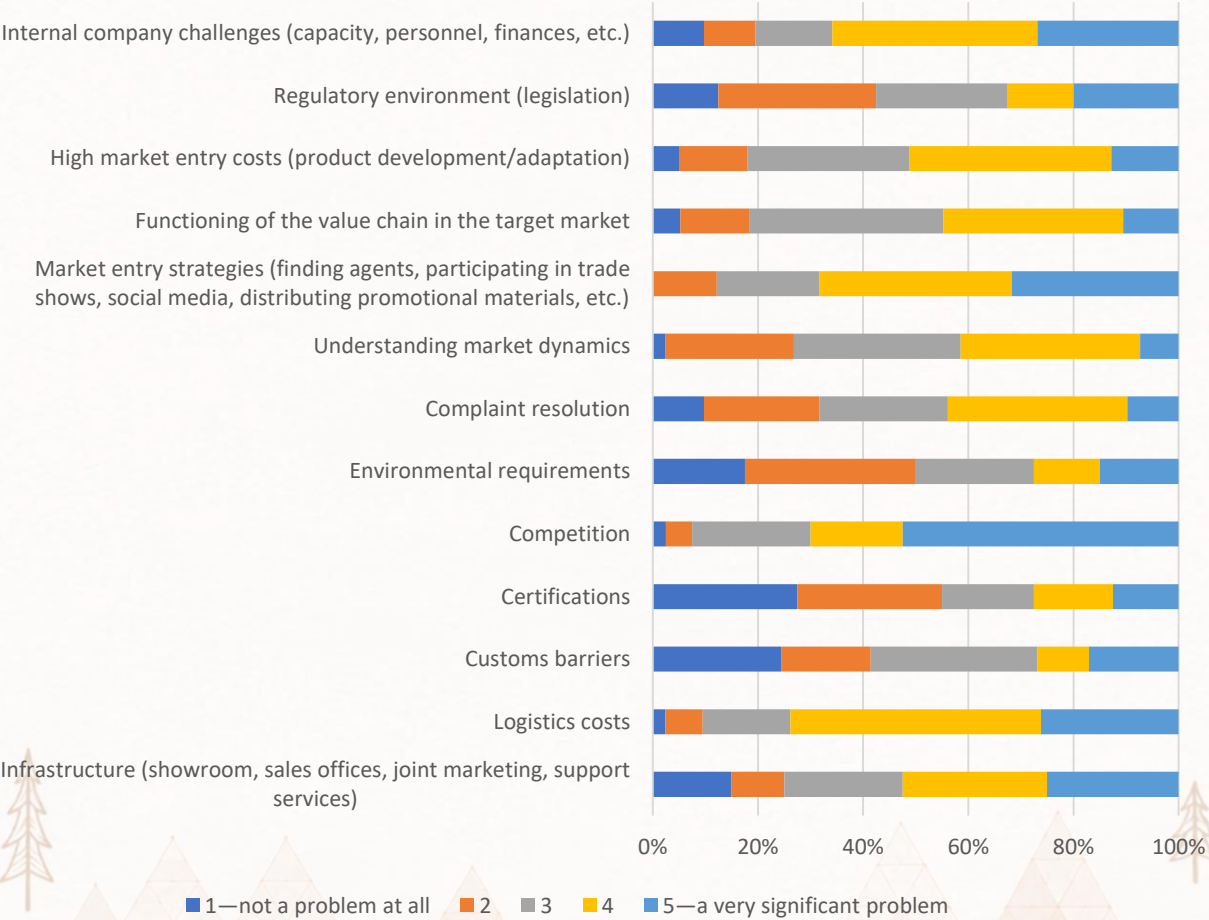
USA · Canada

ASIA

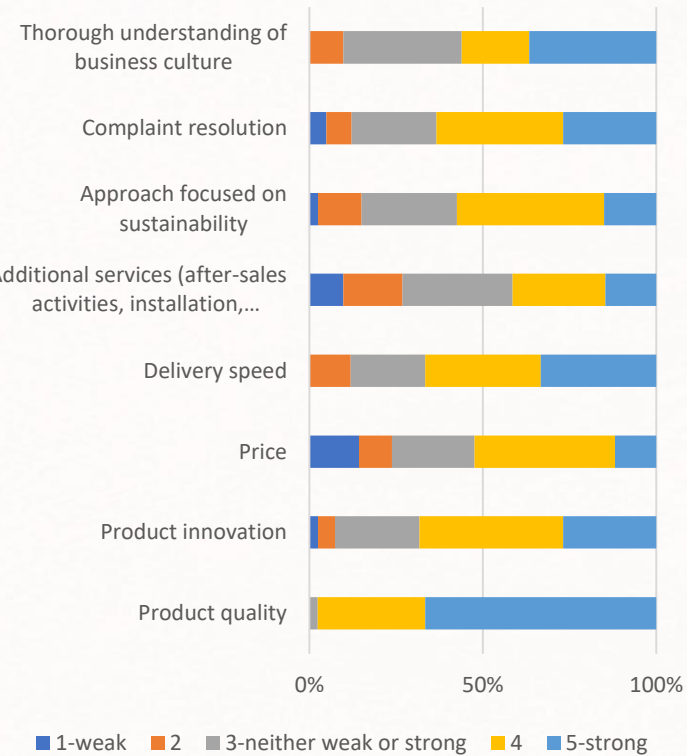
China · Japan

Selective growth markets

What makes exporting difficult?



How do companies compete?



1

QUALITY

Supply reliability and product excellence

2

INNOVATION

Customisation and new solutions

3

SUSTAINABILITY

Materials, processes and certification

4

SPEED

Responsive and dependable delivery

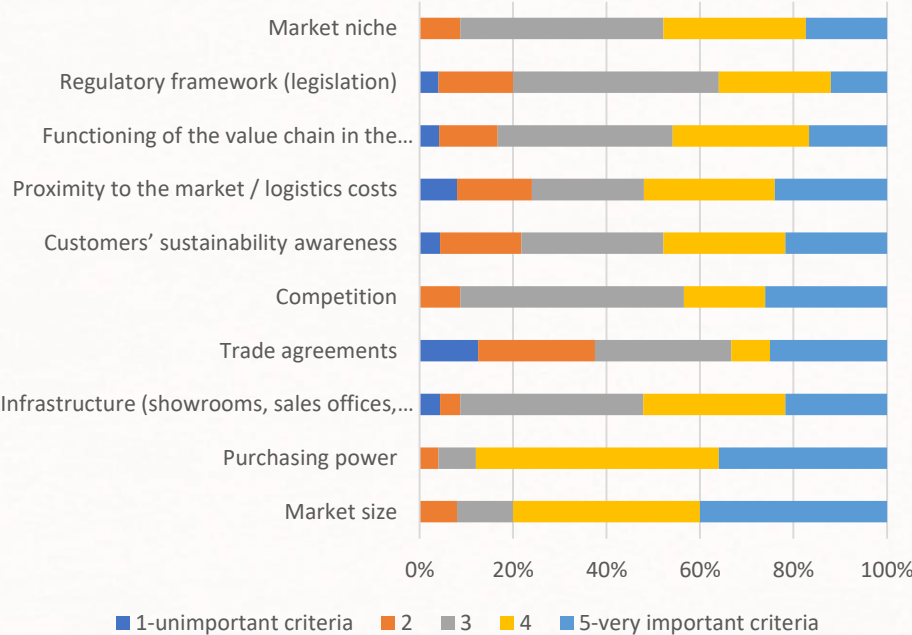
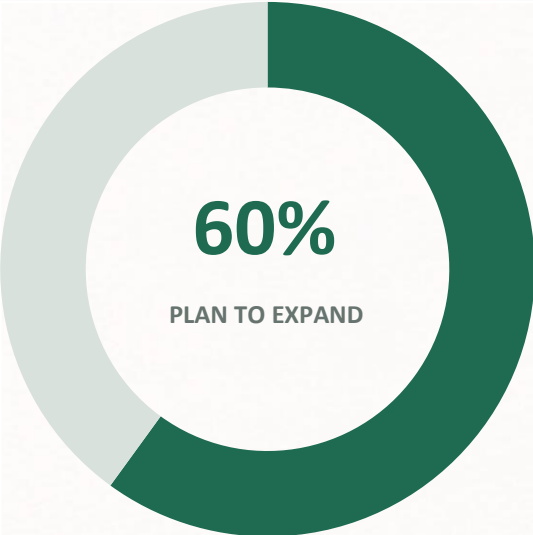
5

SERVICES

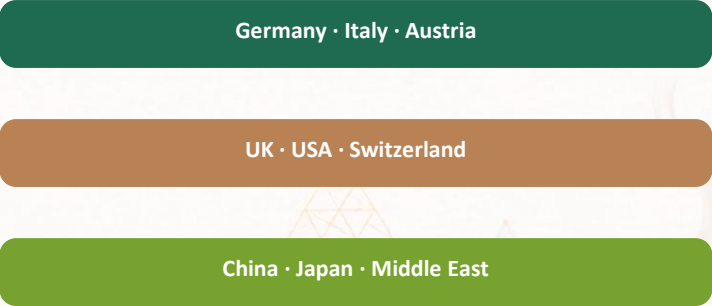
Installation, support and after-sales

Price is an advantage,
but not the primary basis of differentiation.

Growth intentions: ambition meets capacity



Priority markets

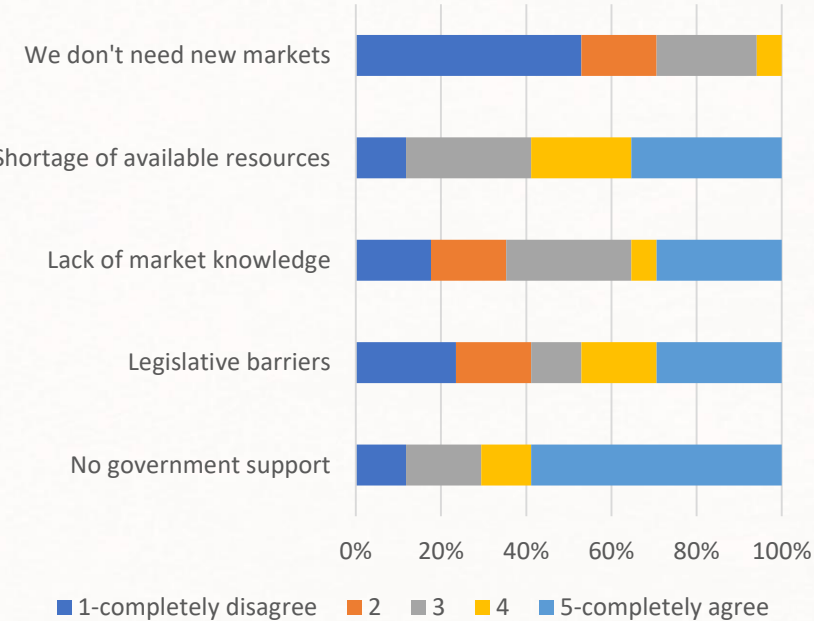


Selection criteria

- 1 Purchasing power
- 2 Market size
- 3 Market niches

Companies are looking for higher-value demand,
not simply geographic reach.

Why 40% hold back



1

Insufficient systemic support
partners · promotion · administration

2

Limited resources
people · finance · organisation

3

Market knowledge gaps
business culture · channels · regulation

4

Regulatory barriers
especially outside the EU

Sustainability can also mean limiting distance: one company chose a 500 km operating radius.

Strategic interpretation

DEFEND

Core European markets

Reliability · Relationships · Speed

DIFFERENTIATE

Higher-value offers

Quality · Design · Sustainability

DIVERSIFY

Selective growth
markets

Niches · Partners · Market knowledge

Internationalisation is selective,
value-based and constrained by organisational capacity.

Conclusions

1 EUROPE REMAINS THE BASE

Proximity, alignment and logistics still matter.

2 VALUE BEATS PRICE

Quality, innovation and sustainability lead.

3 DIVERSIFICATION IS SELECTIVE

MENA, North America and Asia offer targeted opportunities.

4 CAPACITY IS THE BOTTLENECK

Resources, knowledge and support shape expansion.

Competitiveness depends on combining strong products with the capability to navigate international markets.

Thank you

Questions & discussion

matej.jost@bf.uni-lj.si



**Model for identifying potential
foreign markets for certain groups of
wooden products**
V4-2513



ACKNOWLEDGEMENTS



arrs
SLOVENIAN RESEARCH AGENCY



REPUBLIKA SLOVENIJA
**MINISTRSTVO ZA GOSPODARSKI
RAZVOJ IN TEHNOLOGIJO**