

European Bioenergy and Policy development

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AEBIOM

EUROPEAN BIOMASS ASSOCIATION

The **common** voice of the European bioenergy sector for the past 25 years.



Its aim is to develop a **sustainable** bioenergy market based on **fair** business conditions.

AEBIOM brings together around **30 national associations** and **90 companies** from all across Europe to represent more than 4000 indirect members.



AEBIOM is an umbrella organisation for:



EUROPEAN PELLET COUNCIL

AN AEBIOM NETWORK

EPC represents the interests of the European **wood pellet** sector.



INTERNATIONAL BIOMASS TORREFACTION COUNCIL

AN AEBIOM NETWORK

IBTC is a platform of international companies promoting the use of torrefied biomass as an energy carrier.

our **FULL MEMBERS**



our **ASSOCIATED MEMBERS**

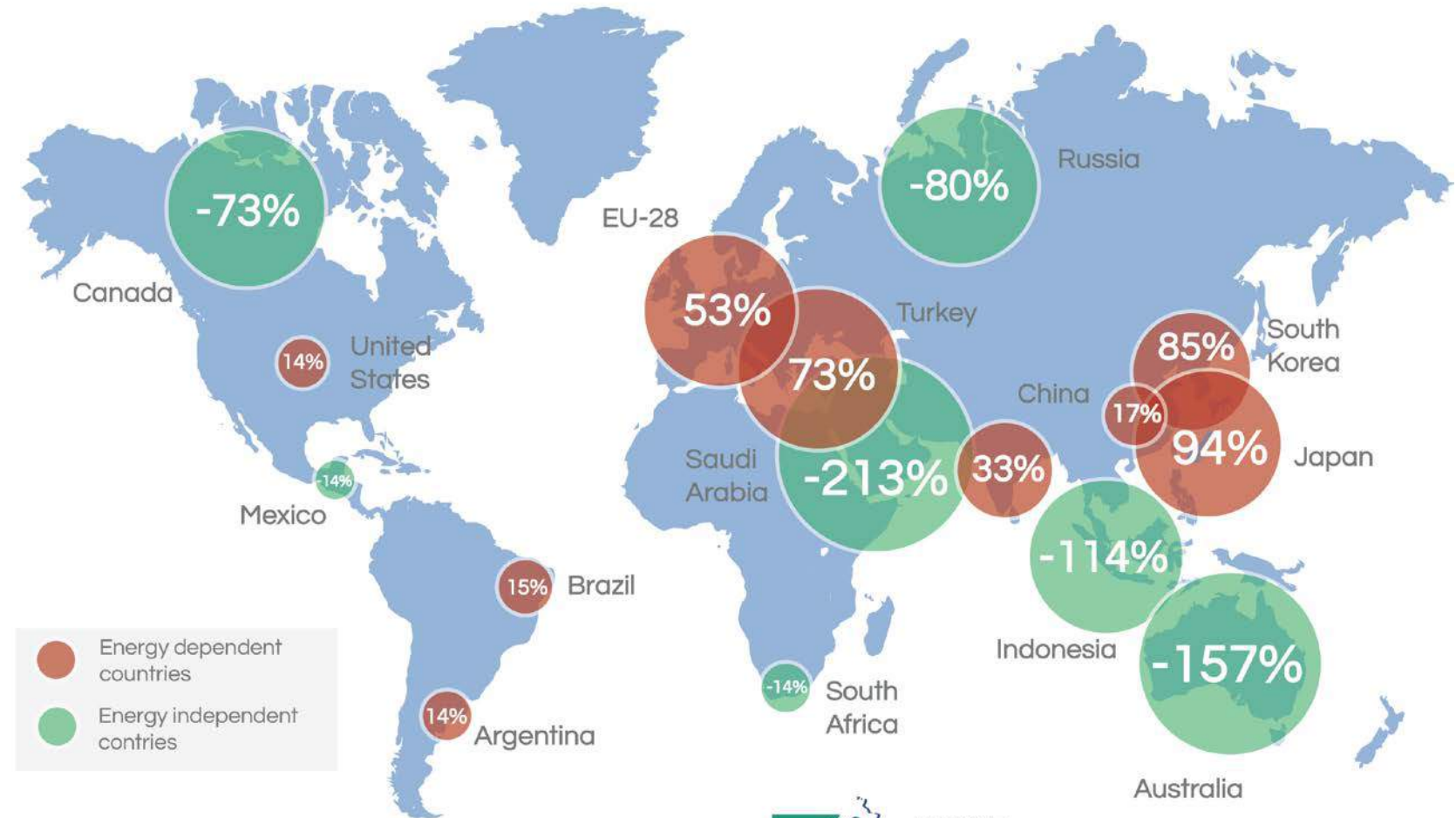


Energy challenges

Europe and Japan are both very energy dependant.



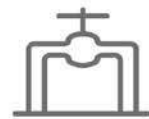
World map of the energy dependency
(in 2013, %)



- Energy dependent countries
- Energy independent countries

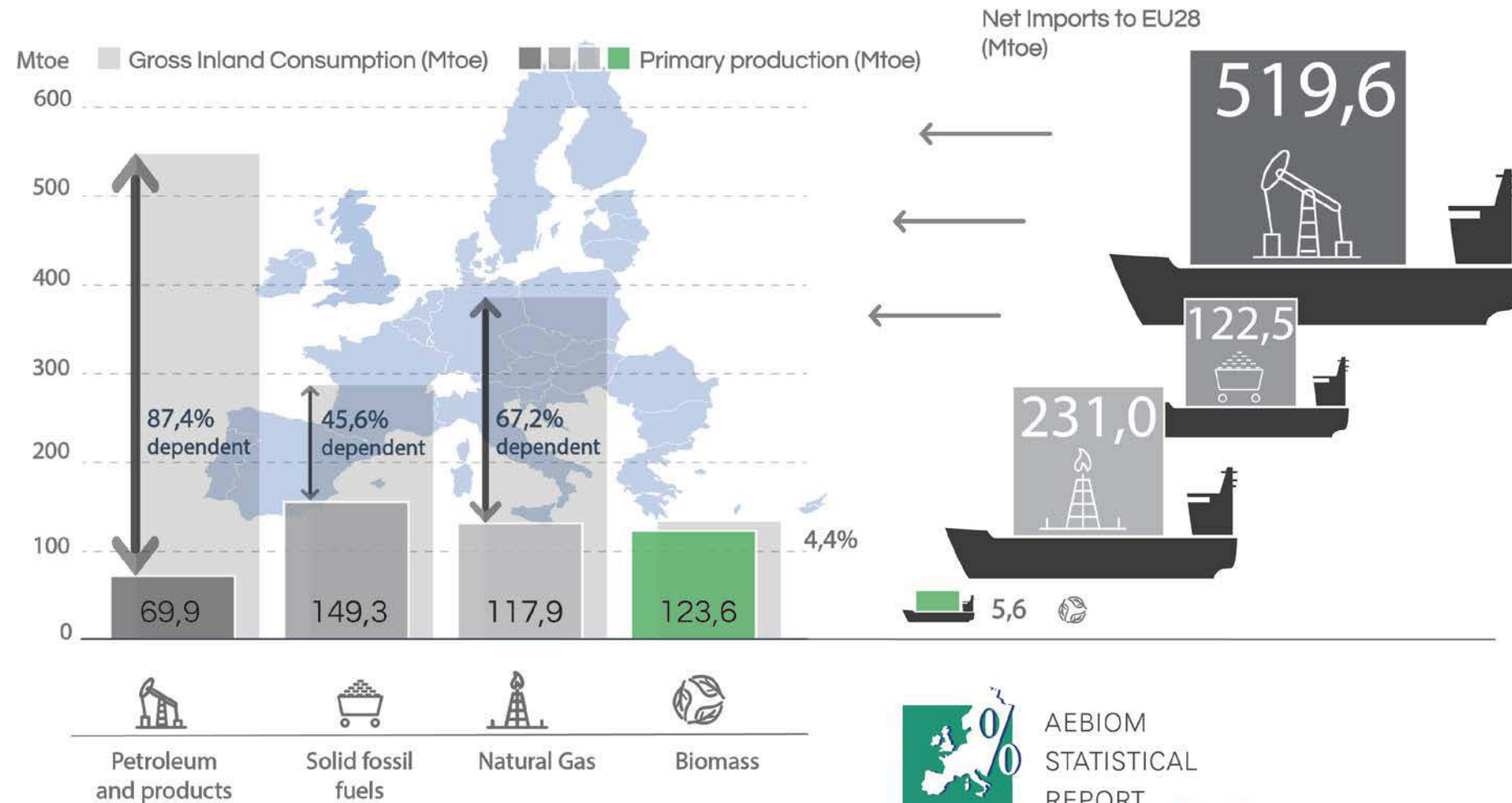


Energy challenges



EU-28 energy dependency (in 2014, Mtoe, %)

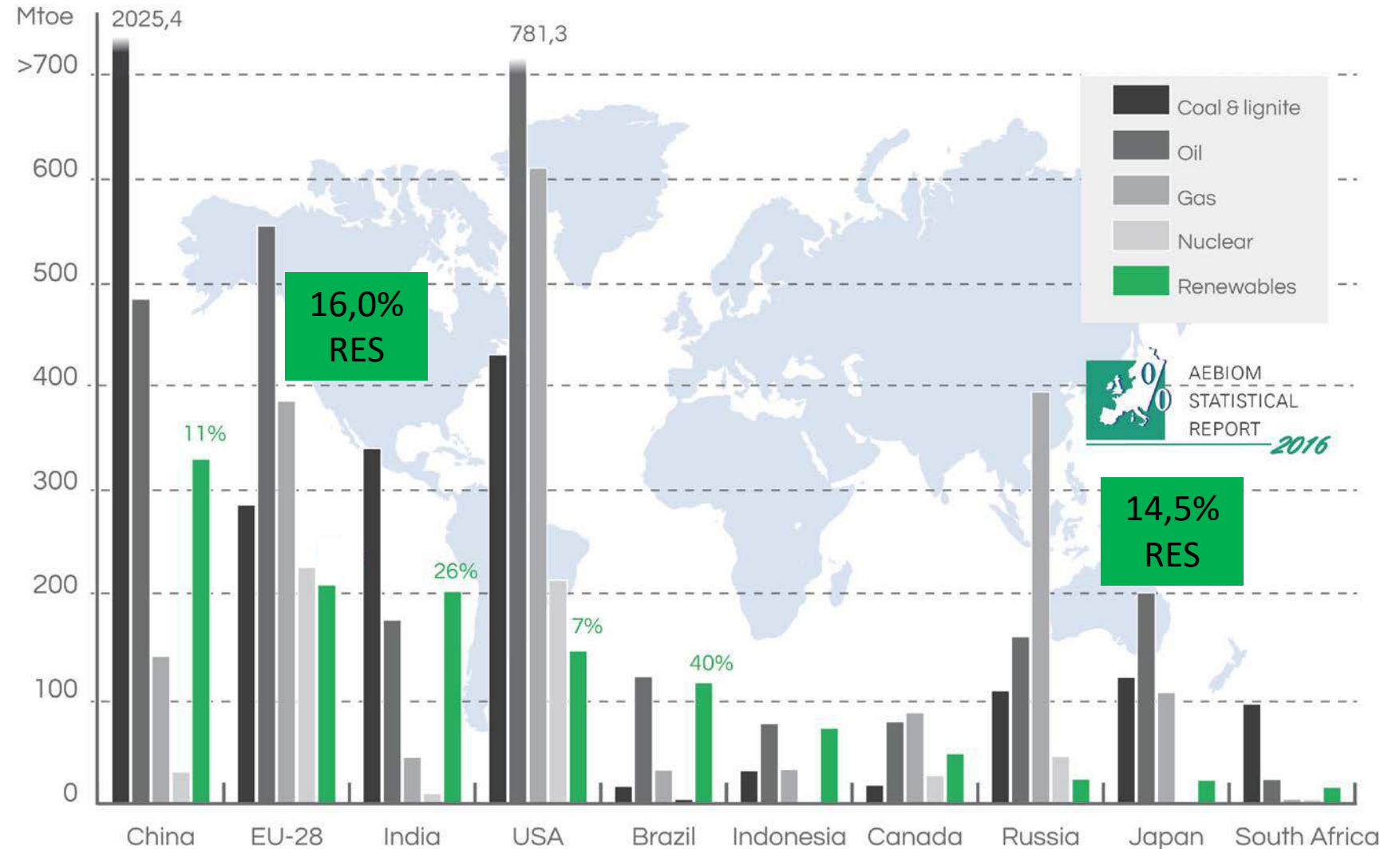
But bioenergy remains mainly an indigenous source.



Source: Eurostat, AEBIOM's calculations

Energy challenges

 **TOP 10 countries' gross inland consumption of renewables compared with EU-28**
(in 2014, Mtoe, %)

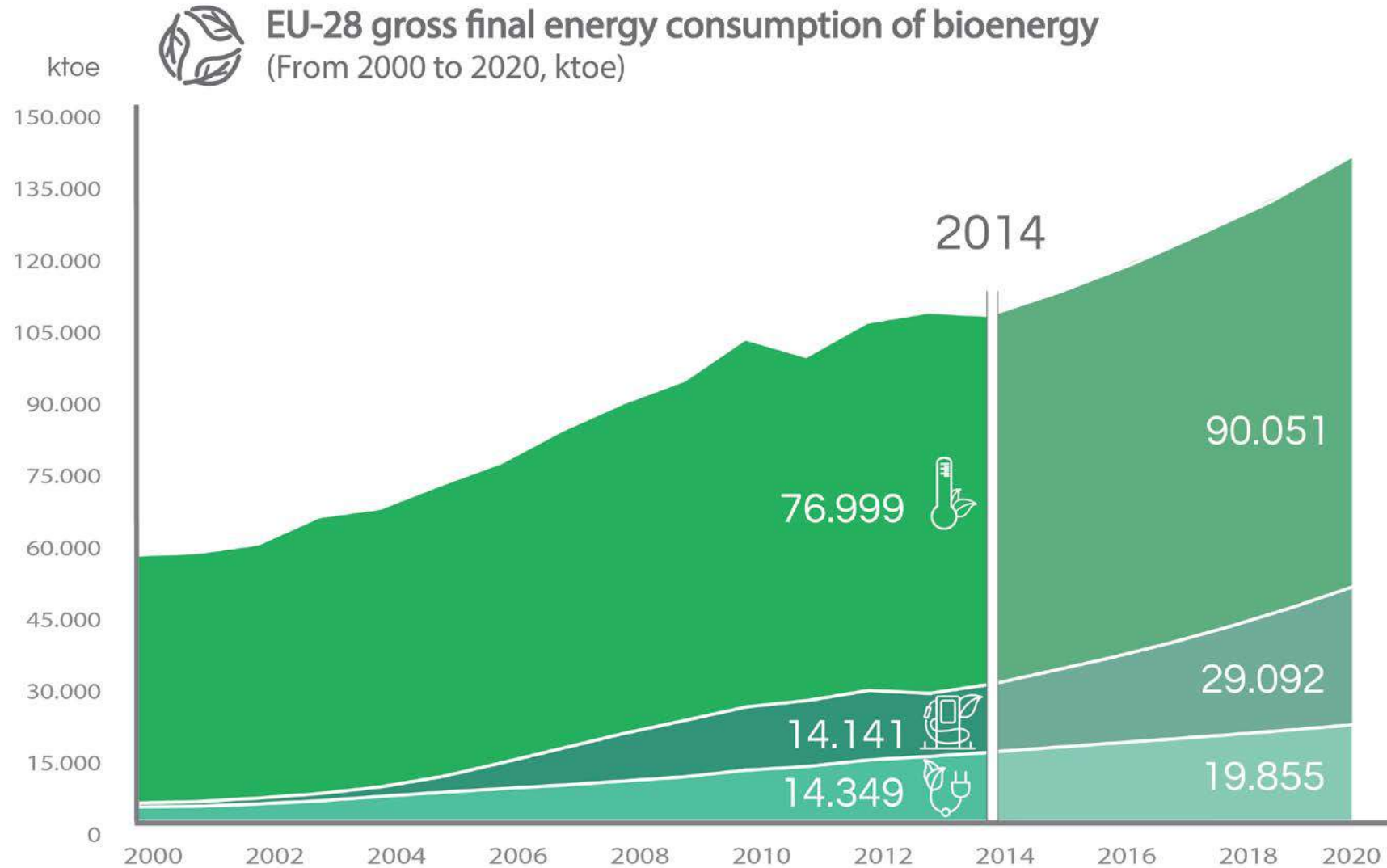


Source: Eurostat, AEBIOM's calculations

Renewables are becoming mainstream in Europe

Bioenergy development

Bioenergy grows at a good pace, dominated by the heat sector.

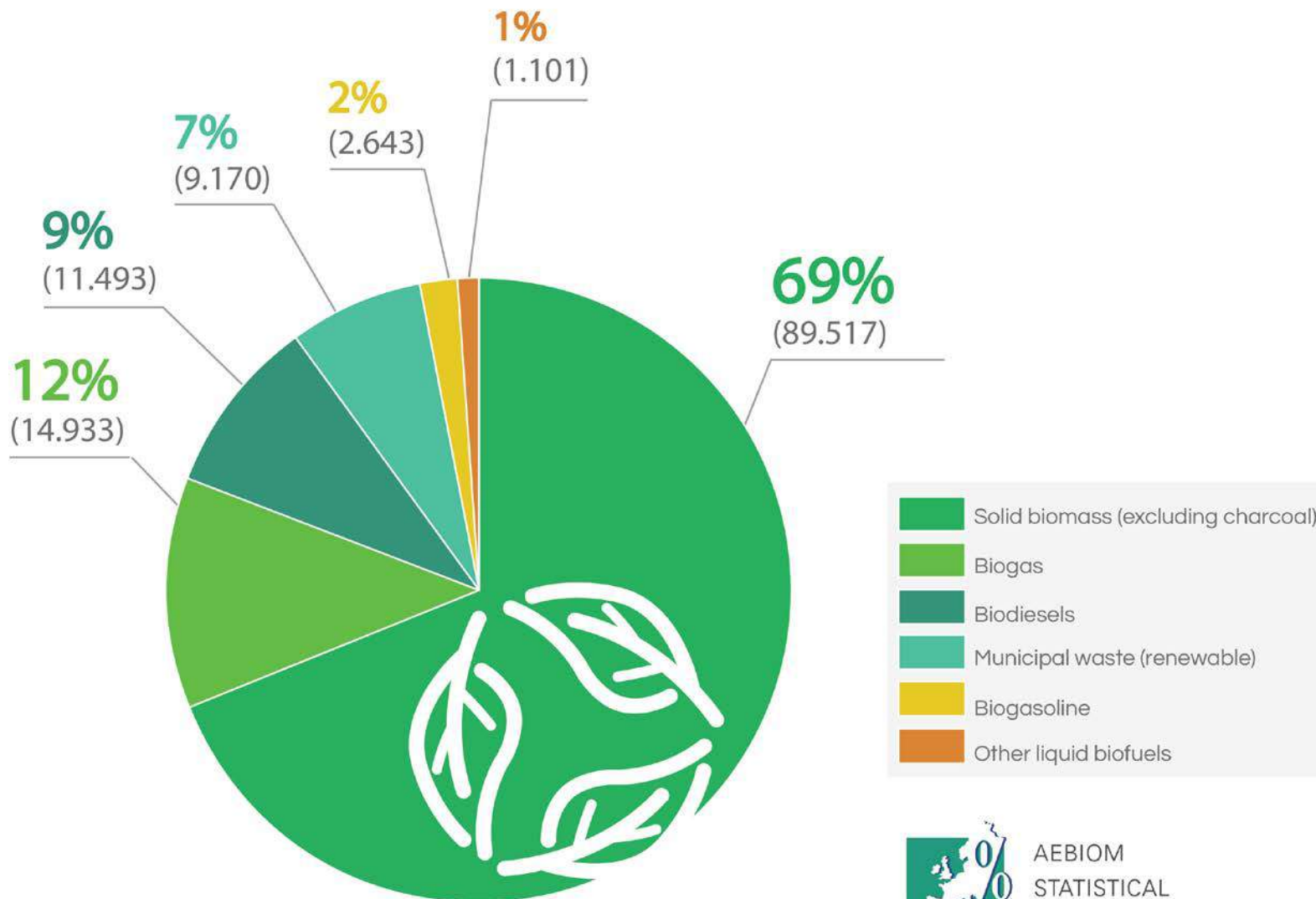


Bioenergy development



EU-28 gross inland energy consumption of biomass and biowaste
(in 2014, ktoe, %)

Most of the feedstock is solid biomass.



Source: Eurostat, AEBIOM's calculations



AEBIOM
STATISTICAL
REPORT

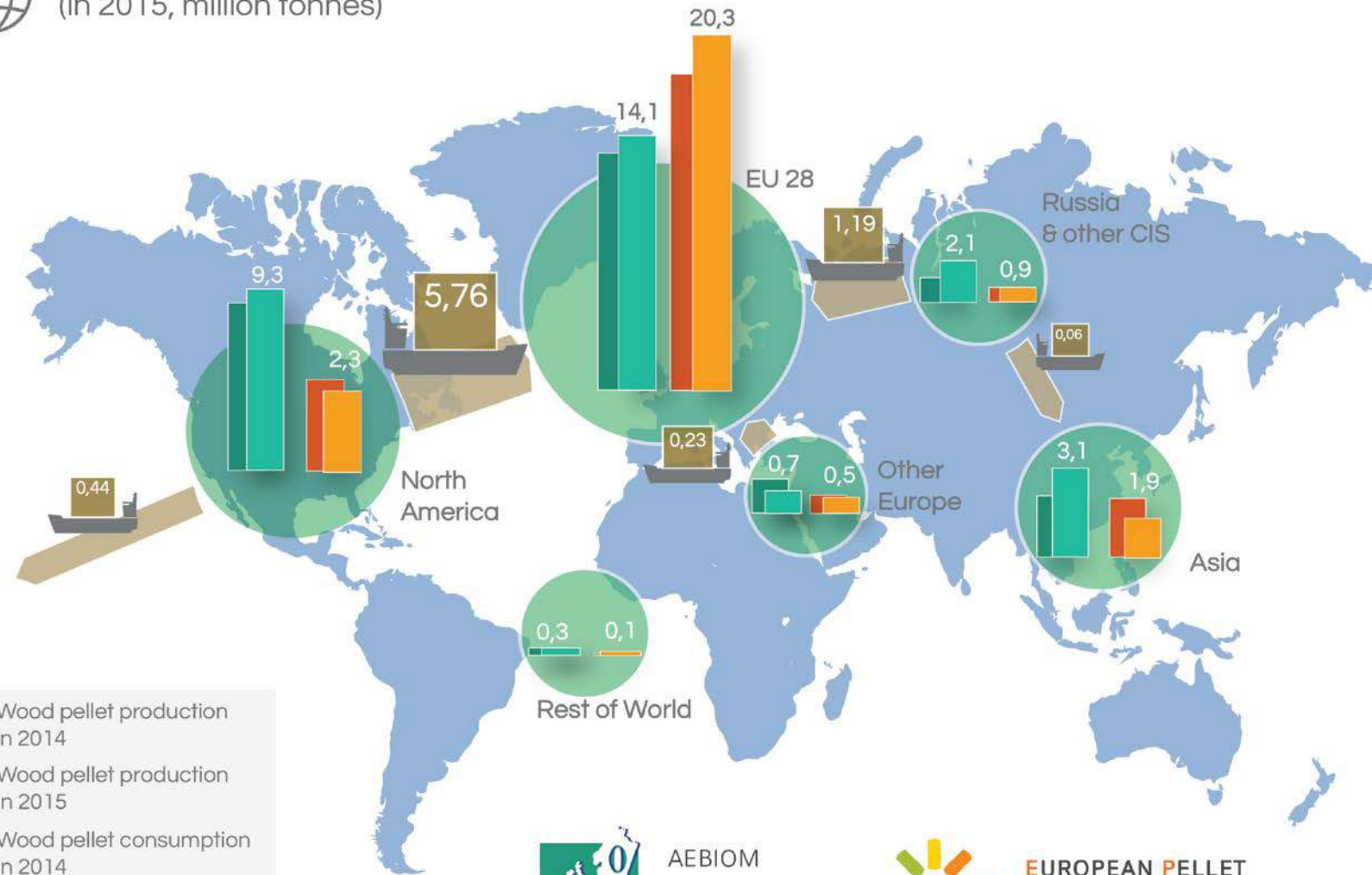
2016

Bioenergy development



World pellet map and trade flows
(in 2015, million tonnes)

With 20 Mtons Europe is the largest pellet market, importing 7 Mtons.



- Wood pellet production in 2014
- Wood pellet production in 2015
- Wood pellet consumption in 2014
- Wood pellet consumption in 2015



Source: EPC Survey, Eurostat, Hawkins Wright, FAO

Bioenergy development

 **European wood pellet consumption**
(in 2015, tonnes, %)

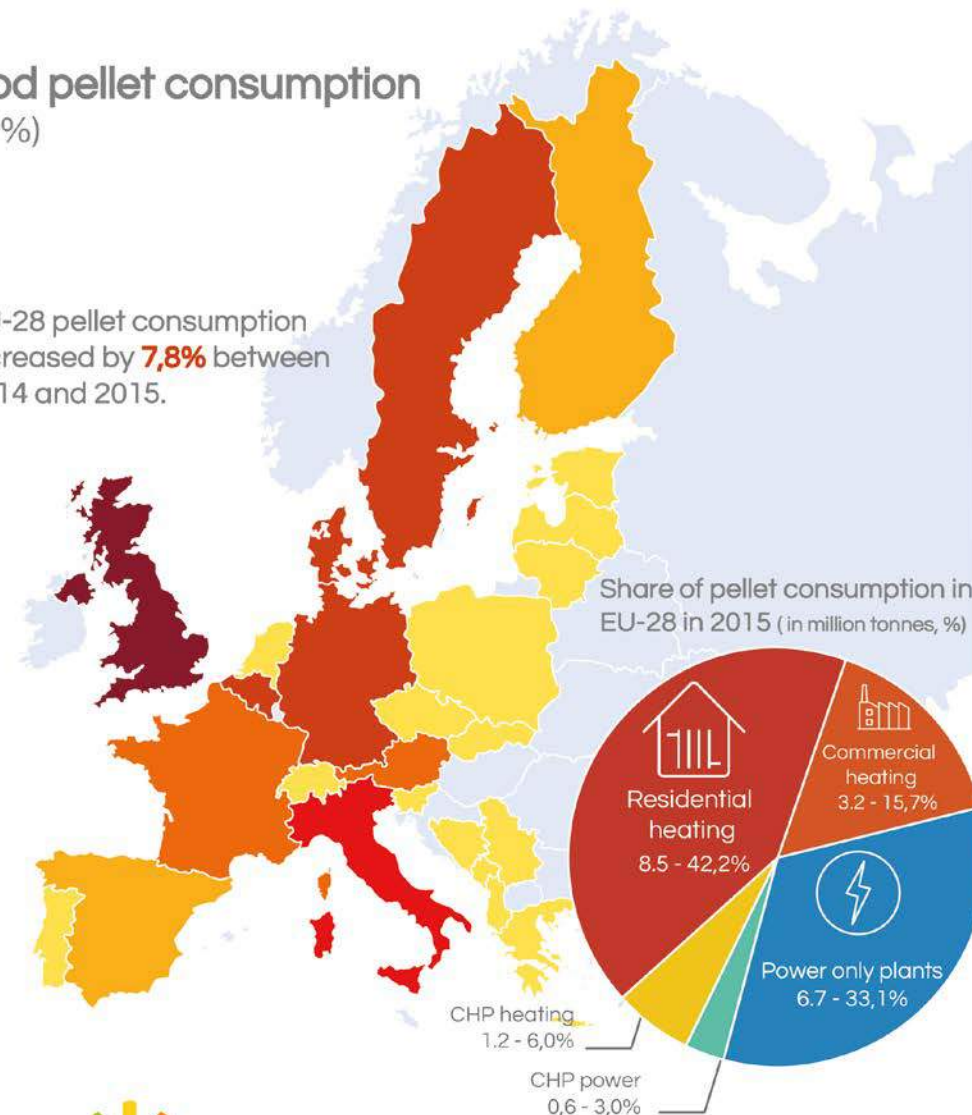
Most of these pellets are used for domestic heating, followed by power plants.

EU-28 consumption
20,3
million tonnes in 2015

EU-28 pellet consumption increased by **7,8%** between 2014 and 2015.



Source: EPC Survey



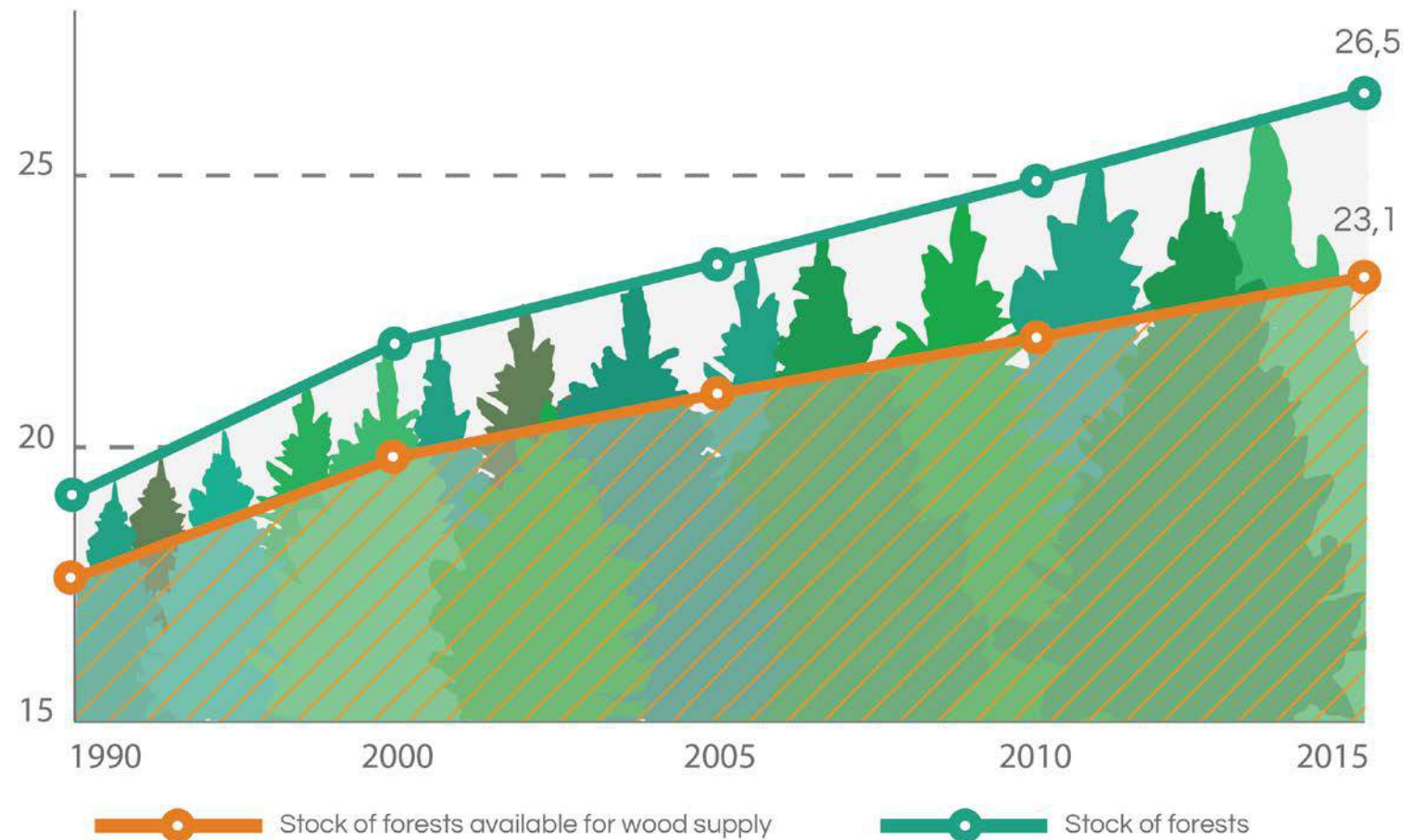
Bioenergy development



EU-28 evolution of forest stock and stock available for wood supply

(From 1990 to 2015, billion of m³)

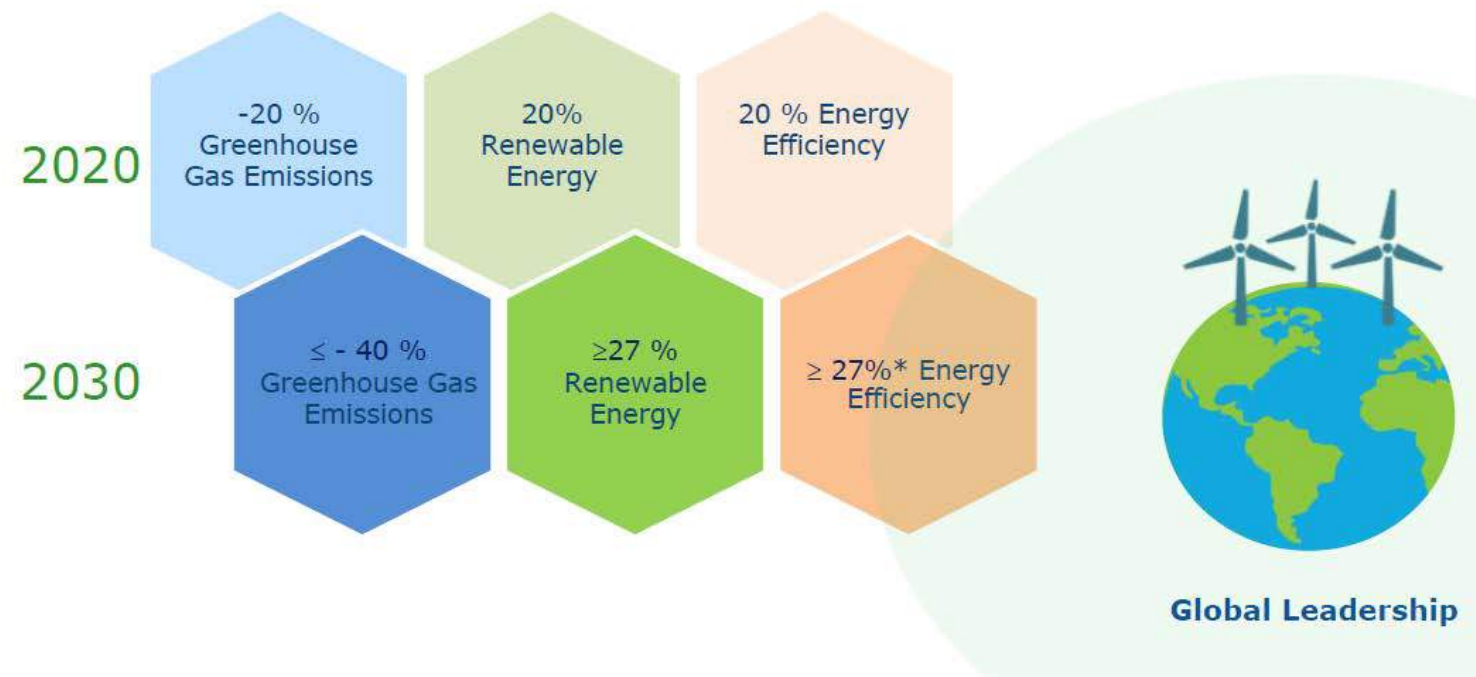
And carbon stock in forests is still growing because we harvest less than 2/3 of annual growth.



European Union Policy

The Clean Energy Package, a new tool box to reach 2030 objectives.

October 2014: European Council Agreement on Climate and Energy objectives 2030



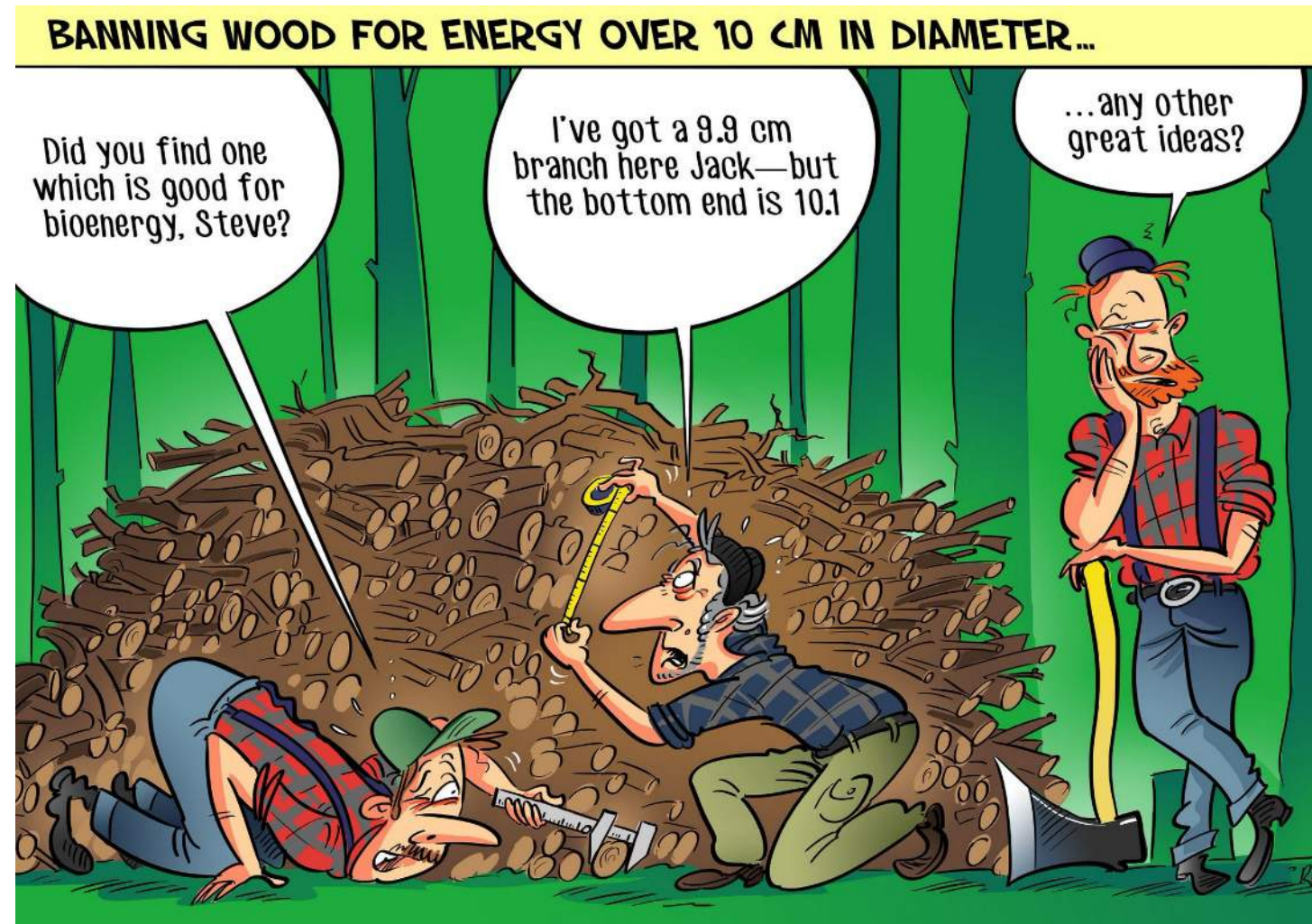
European Union Policy

Lessons learned

- Too generous **support schemes** offer short term impact only. It leads afterwards to acceptance crisis and less political support.
- **Sustainability** should be addressed from the beginning to ensure public acceptance, with a balanced and stable approach.
- Energy does not mean electricity. **Heat and transport** markets are challenging to decarbonize.

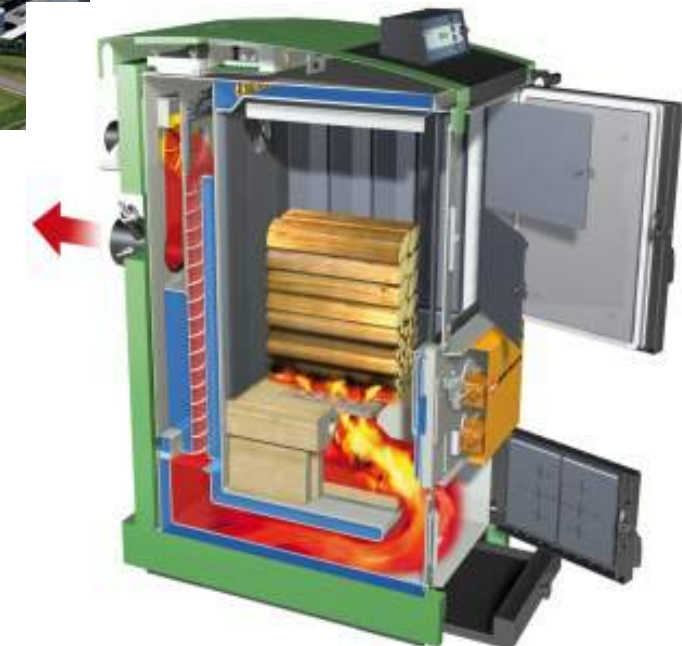
European Union Policy

An example of crazy proposal aiming at banning round wood.



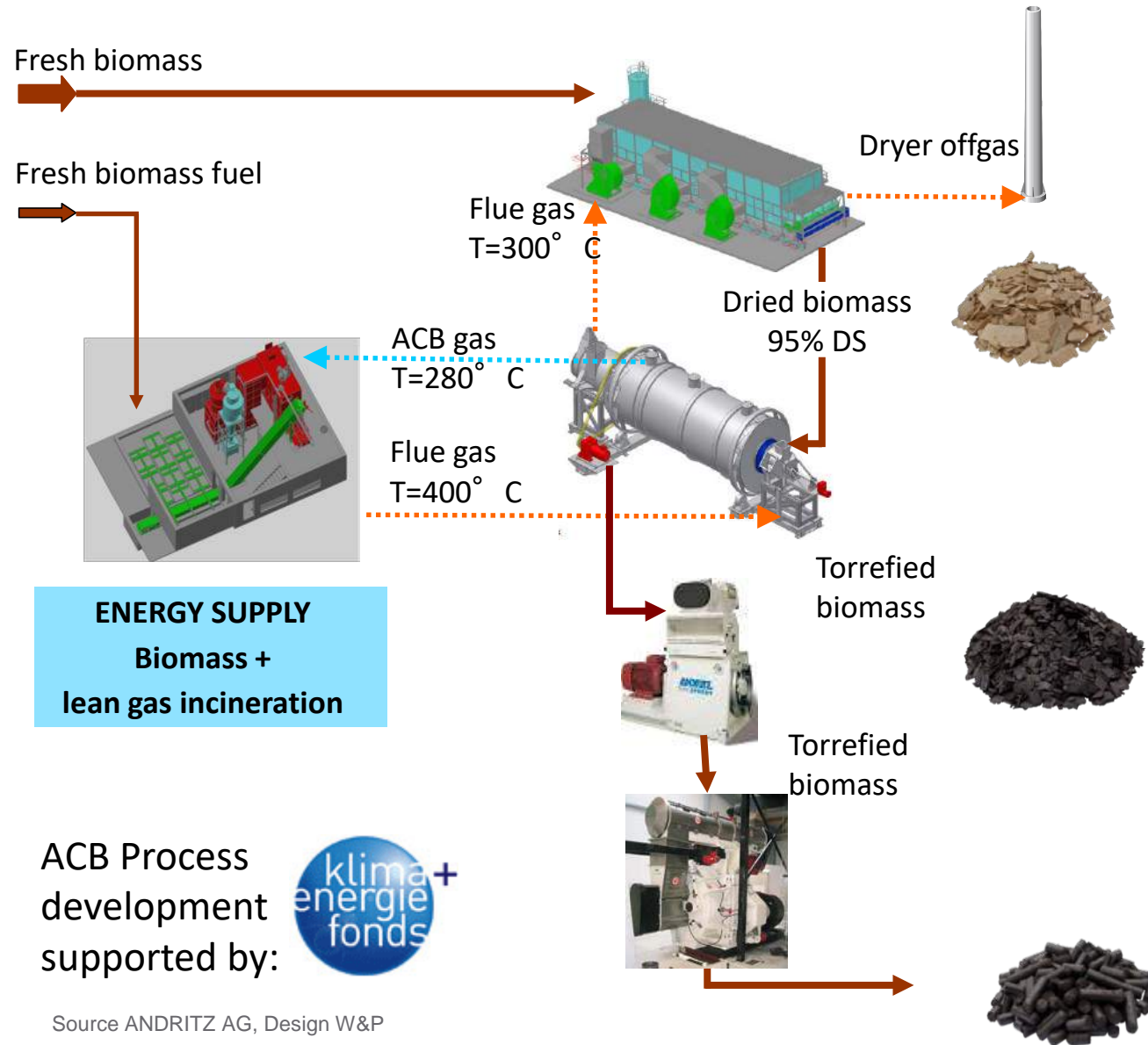
Cooperation

Europe acquired a bioenergy technology leadership along the supply chain from fuel procurement to conversion into heat/electricity.



Cooperation

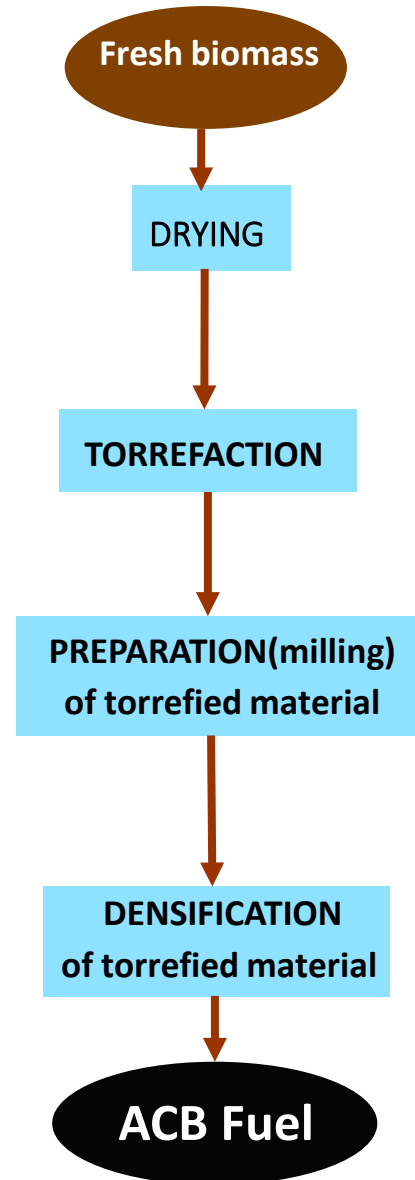
Example: the torrefaction process brings major fuels enhancement: grindability, hydrophobicity, energy density



ENERGY SUPPLY
Biomass + lean gas incineration

ACB Process development supported by:

Source ANDRITZ AG, Design W&P



Cooperation



INTERNATIONAL BIOMASS
TORREFACTION COUNCIL
AN AEBIOM NETWORK

IBTC Full Members



IBTC/AEBIOM can help.



IBTC Developing and Associated Members



www.biomassstorrefaction.org



CAWES



EUROPEAN BIOENERGY FUTURE

2017 AEBIOM CONFERENCE

NOVEMBER 21-22, BRUSSELS

“
A yearly *rendez-vous* for all
European bioenergy stakeholders.”

Companies are keen on learning more about market trends, networking and accessing business opportunities, but are also looking for a better understanding of the current policy framework – and a unique chance to discuss it *vis-a-vis* with institutional players.

On the other side, **policy makers** look for a better understanding of where the sector is headed – in terms of market dynamics, latest technology innovations, etc. - and to have an opportunity to hear it from bioenergy stakeholders coming from all over Europe.

BE PART OF THE DISCUSSION.

www.conference.aebiom.org

Scan, learn more.



Thank you !

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