AEBIOM
EUROPEAN BIOMASS ASSOCIATION

Biomass market trends and bioenergy sector views on EU policy

Fanny-Pomme Langue

19 October 2015

AEBIOM
EUROPEAN BIOMASS ASSOCIATION

common voice of the European bioenergy sector for the past 25 years

non-profit, Brussels based association founded in 1990

How it works

30 Full Members
90 Associate Members
from all over the world

Umbrella of 3 Networks

EUROPEAN PELLET COUNCIL
EPC is an umbrella organisation representing the interests of the European wood pellet sector.

EUROPEAN INDUSTRY OF PELLET SUPPLIERS
EIPS is a platform of European companies focused on the wood pellet business.

INTERNATIONAL BIOMASS TORREFACTION COUNCIL
IBTC is a platform of international companies promoting the use of torrefied biomass as energy carrier.

How to stay informed and connected

AEBIOM Statistical Report

AEBIOM Bioenergy Conference

Biomass Counts Campaign

AEBIOM
EUROPEAN BIOMASS ASSOCIATION

AEBIOM MEMBERS

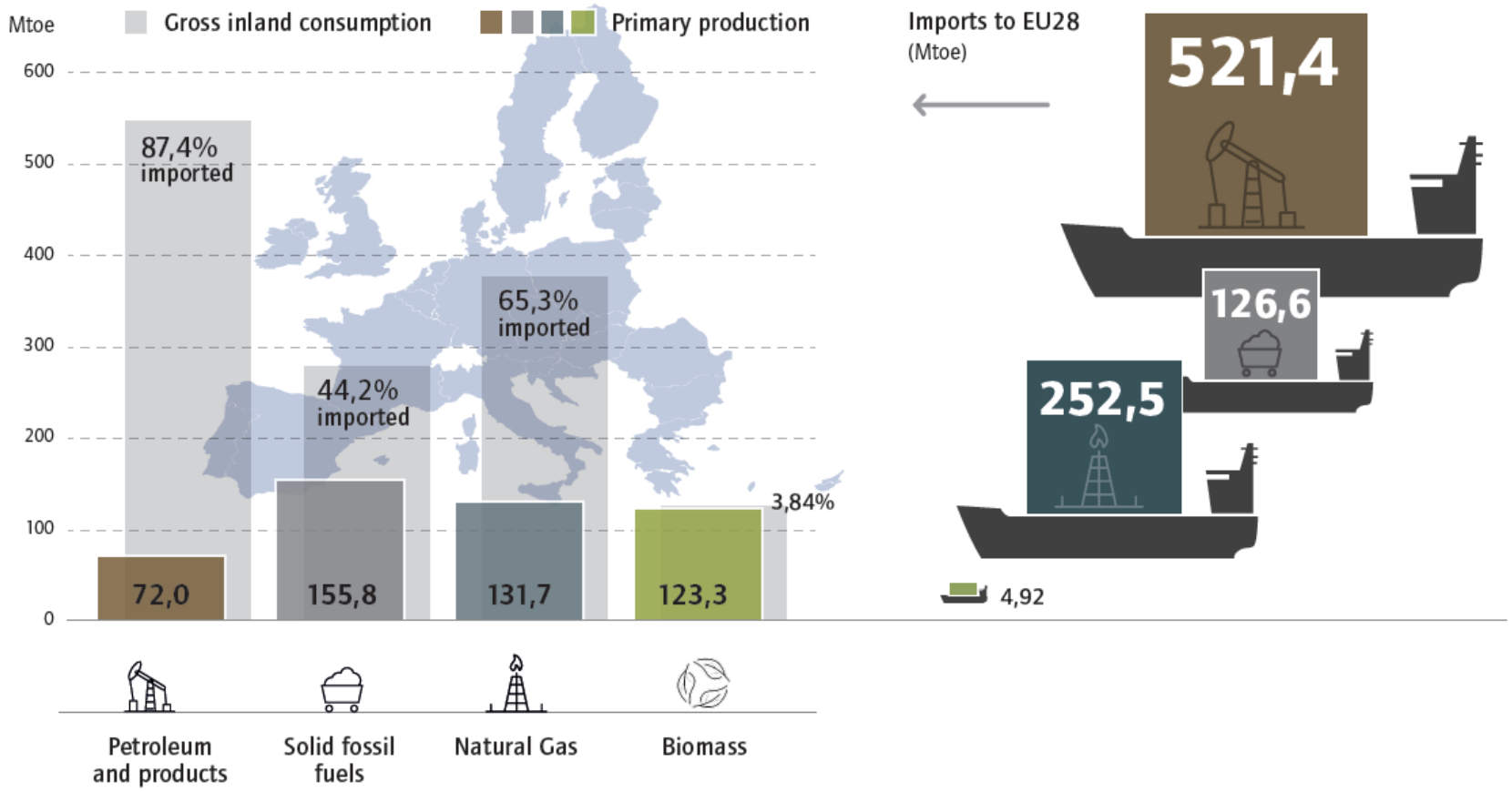
Full Members

Associate Members

AEBIOM
EUROPEAN BIOMASS ASSOCIATION

Bioenergy Key Facts

European Energy Dependency



Source: AEBIOM statistical report 2015

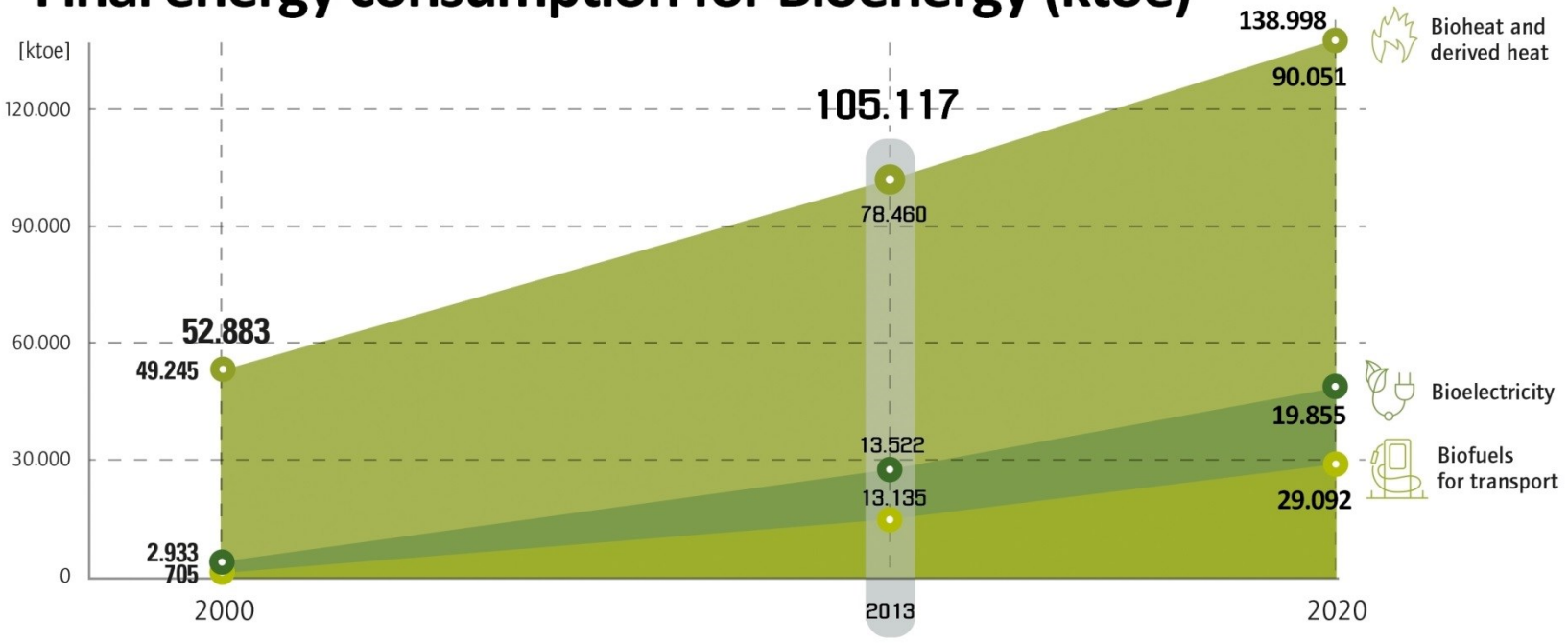
© AEBIOM

AEBIOM
EUROPEAN BIOMASS ASSOCIATION

Bioenergy Key Facts

- Final energy consumption of bioenergy in 2013 was 105 Mtoe, double that of 2000
- 62% of EU renewable energy consumption today
- Half of the 20% EU renewable energy target in 2020

Final energy consumption for Bioenergy (ktoe)

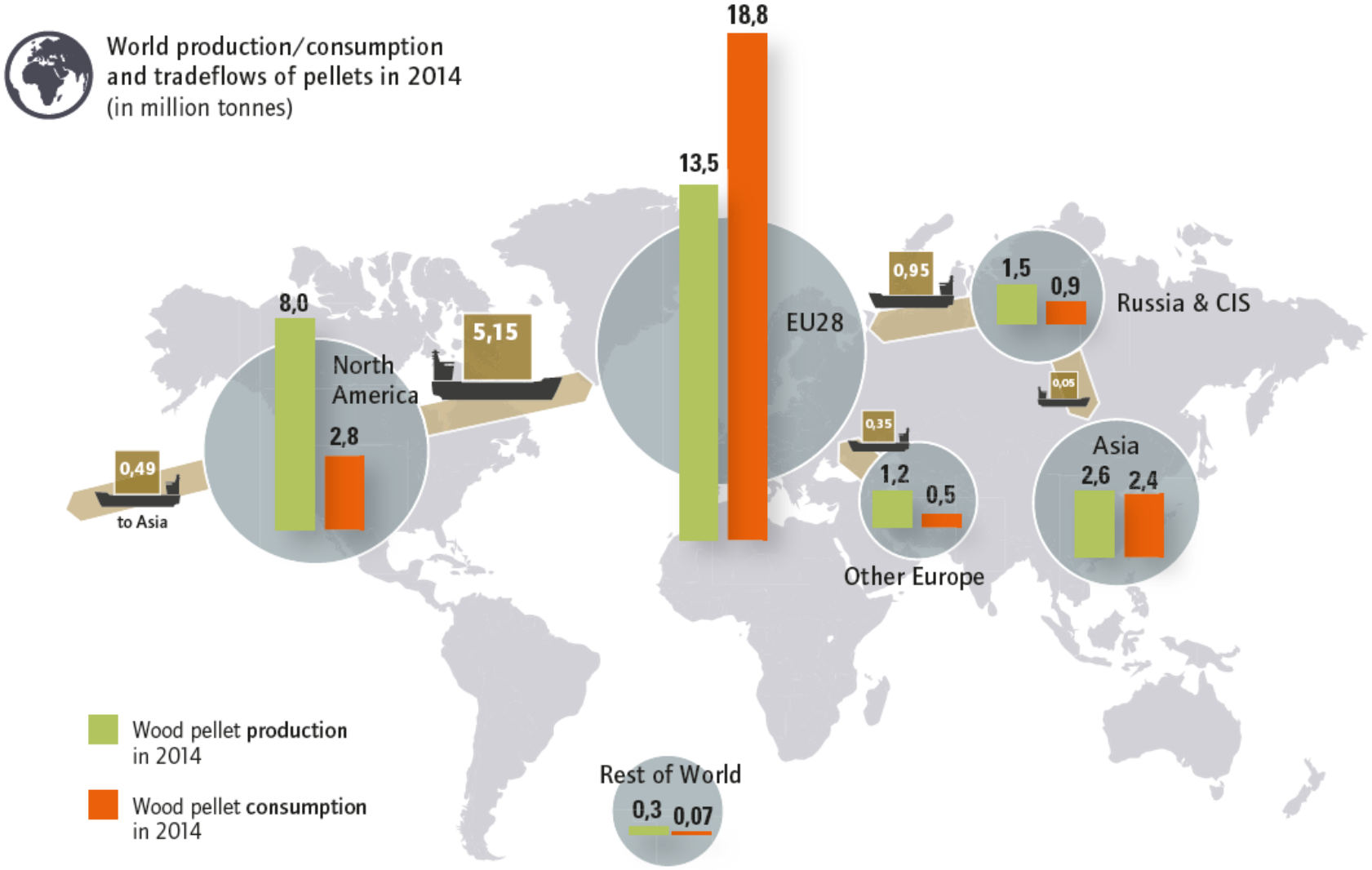


Source: AEBIOM statistical report 2015

© AEBIOM

AEBIOM
EUROPEAN BIOMASS ASSOCIATION

Bioenergy Key Facts

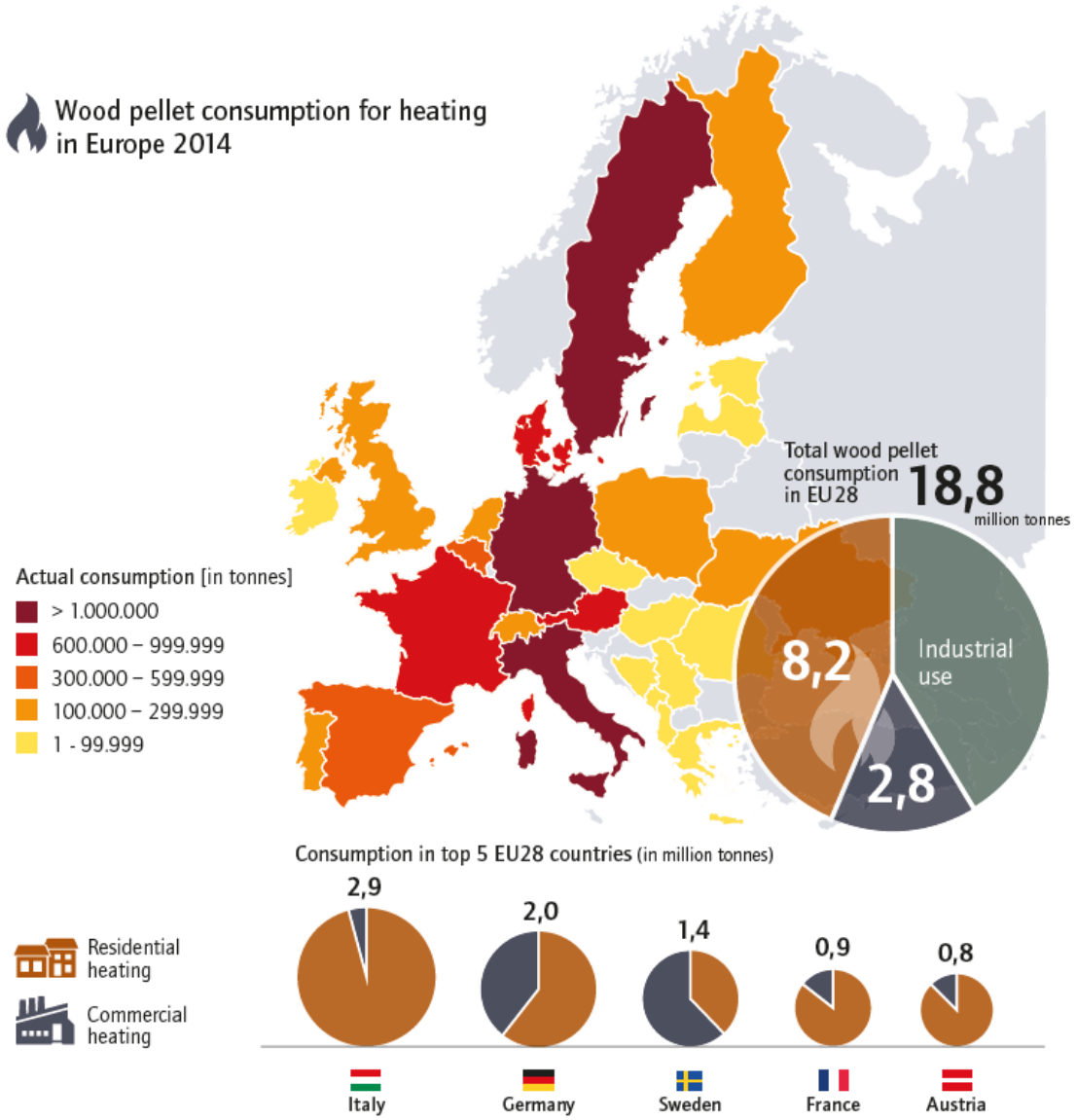


Source: AEBIOM statistical report 2015

© AEBIOM - EPC

AEBIOM
EUROPEAN BIOMASS ASSOCIATION

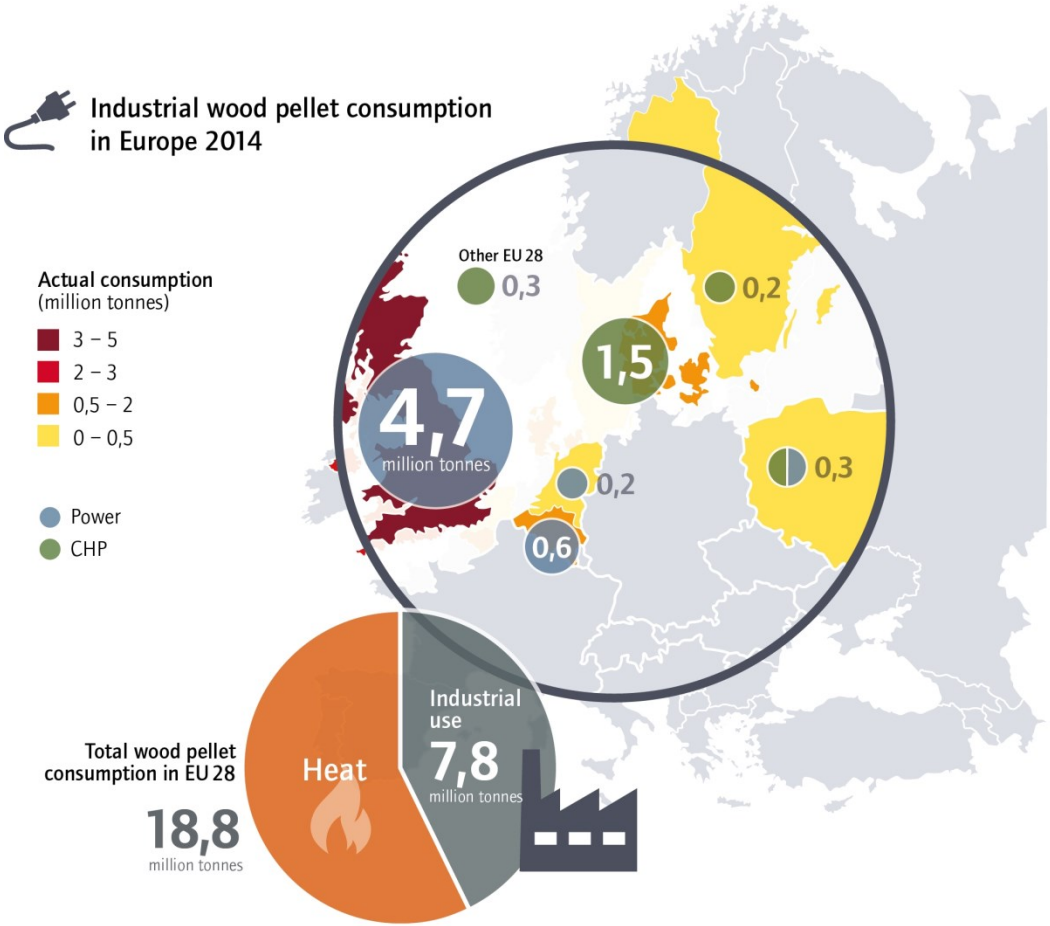
Bioenergy Key Facts



Source: AEBIOM statistical report 2015

© AEBIOM - EPC

AEBIOM
EUROPEAN BIOMASS ASSOCIATION



Source: AEBIOM statistical report 2015

© AEBIOM - EPC

AEBIOM
EUROPEAN BIOMASS ASSOCIATION

EU Policy

- 2030 EU climate and energy framework
- Biomass sustainability
- EU requirements for bioenergy installations
- Heat Strategy

2030 EU Climate and Energy framework

- Member States position October 23rd 2014 (European Council)

  27% RES target EU binding - BUT not nationally binding

  40% GHG emissions reduction

  27% reduction of energy consumption - indicative objective

- This approach must now be accompanied by a robust and reliable **governance system** for reaching renewables and energy efficiency targets → national plans with key indicators

AEBIOM
EUROPEAN BIOMASS ASSOCIATION

Biomass Sustainability

EU 2030 climate and energy network:

*An **improved biomass policy** will also be necessary to maximise the resource efficient use of biomass in order to deliver **robust and verifiable greenhouse gas savings** and to allow for **fair competition between the various uses of biomass resources** in the construction sector, paper and pulp industries and biochemical and energy production. This should also encompass **the sustainable use of land, the sustainable management of forests** in line with the EU's forest strategy and address indirect land use effects as with biofuels.*

Energy Union

*The Commission will propose a new Renewable Energy Package in 2016-2017. This will include **a new policy for sustainable biomass and biofuels***

Biomass Sustainability

- Staff working document published 28 July 2014
- Rather balanced: biomass benefits and risks
- No EU legislation today = No certainty for investors & diverse requirements at national level – Room for private and national initiatives
- EU willingness to set a new policy for biomass sustainability (2016)
- EU forest strategy implementation: could contribute to the analysis
- AEBIOM to contribute to the debate

Ongoing studies

By European Commission

Study	Who	Objective
RECEbio	DG ENVI	Resource efficiency impact of future EU bioenergy demand (final report end 2015)
Carbon Impacts of biomass produced in the EU	DG ENER	*qualitative and quantitative* assessment of direct and indirect GHG emissions associated with different types of solid and gaseous biomass used in electricity and heating/cooling – final report 2015 (delay)
Optimized cascading use of wood	DG ENTR	define the cascading use of wood and assess its environmental and socio-economic impacts - To start soon
Imports from North America	DG ENVI	Study on environmental impacts of growing biomass imports from North America (Consortium to be formed)

By EU NGOs

Study	Who	Objective
Forest biomass for energy: current trends, carbon balance and sustainable potential	Birdlife, EEB, T&E	Clarify possibilities and implications of woody bioenergy supply for natural environment and climate by 2020 and 2030 (published)
Reasons to change the 0 rated criteria for biomass in the EU ETS	Birdlife, EEB, T&E	Study questioning the biomass carbon neutrality principle
Pitfalls and potentials. The role of bioenergy in the EU climate and energy policy post 2020	Birdlife, WWF, Greenpeace , etc…	Four safeguards: 1- the introduction of a cap to limit the use of biomass, 2- the strengthening of the principle of cascading use of biomass, 3- a correct carbon accounting for biomass and finally 4- the introduction of comprehensive binding sustainability criteria (published).

AEBIOM POSITION

- **EU harmonised policy** setting sustainability rukes for solid biomass for heating and cooling (H&C) and electricity production

1) Provide confidence for investments
2) Harmonise MS legislation + regulatory equal playing field for biomass trade
3) Strengthen public acceptance by showing the sector responsibility.

- Energy is only one possible use of biomass. In a medium / long term, sustainability should be addressed under a more **holistic approach for all biomass uses**.

- The EU bioenergy sector is willing to explain and demonstrate that biomass used in Europe for energy purposes is sustainable.

AEBIOM POSITION

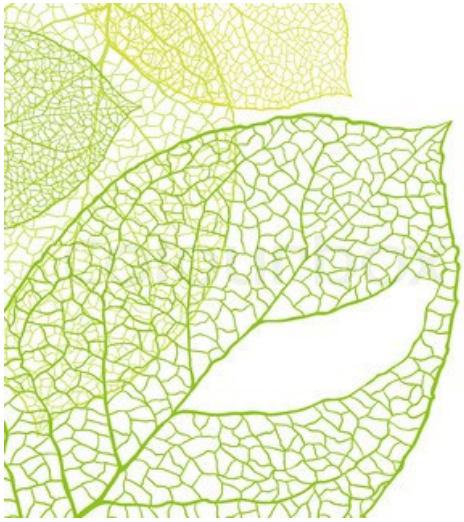
- **Biomass is crucial** to reach 2020 and 2030 EU RES targets
- **Many SMEs, forest owners and farmers** : essential to reach a balanced and non bureaucratic approach
- **Risk of shortage of biomass compliant with sustainability rules** if these were too heavy and too complex
- Future EU criteria **apply to both EU produced and imported biomass**, and not be perceived as trade barriers
- **Coherence** with biofuels criteria
- Take into account **the existing national legislations and rules in place** in the forestry sector as well as existing sustainable forest management (SFM) certification

EU requirements for bioenergy installations
Clean air package

- **Directive on reducing emissions from Medium Combustion Plants** (1- 50 MW fuel capacity)
- Limit NOx, Dust and SO2 emissions

EU requirements for bioenergy installations
Ecodesign requirement

- Minimum criteria for **solid fuel/pellet boilers** (lot 15) and local **space heater/pellet stoves** (lot 20) with a capacity ≤ 500 kW to be put on the market
- Emissions and energy efficiency criteria
- Important impacts on bioenergy appliances
- Ecodesign regulation accompanied by an Ecolabelling regulation: shows energy efficiency in the use phase



EU heat strategy

- Part of the Energy Union
- Public consultation in Summer
- AEBIOM contribution publicly available
  - Better data
  - 2050 energy roadmap no regrets options:
    RES, EE, smart infrastructures
  - Awareness and information
  - Phase out fossil fuels subsidies and regulated prices
  - Functionning carbon market (carbon tax)
  - R&D and innovation

- Planned publication: end January 2016

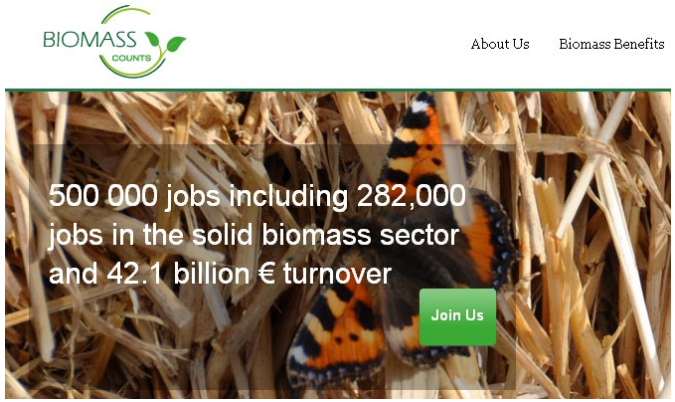
Biomass - An ongoing debate

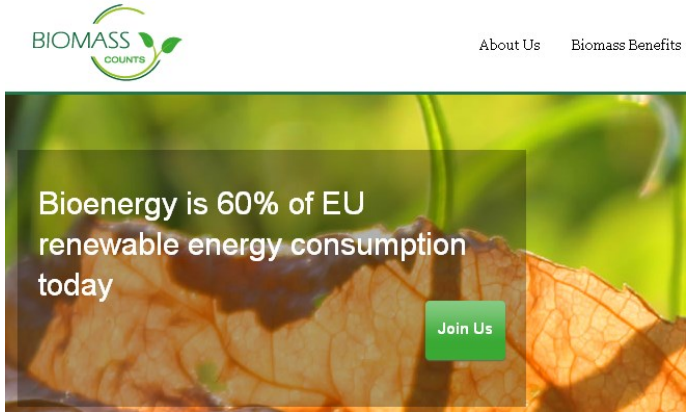
BIOMASS COUNTS

www.biomasscounts.eu

- 5 networking events in 2015
- Factsheets
- Social media
- Statistics
- Etc.

Join Us





AEBIOM
EUROPEAN BIOMASS ASSOCIATION

Thank you for your attention!

Fanny-Pomme Langue
Fanny.langue@aebiom.org

www.aebiom.org

Follow us on:

Join our Biomass Counts Campaign!

www.biomasscounts.eu