



EUROPEAN PELLET
COUNCIL
AN AEBIOM NETWORK

European market update

Forum Pelletu 19th September 2016
Gilles Gauthier

www.pelletcouncil.eu

The European Pellet Council (EPC) is an umbrella organisation of AEBIOM founded in 2010, aiming at representing the interests of the wood pellet sector and at ensuring its sustainable development at European level. EPC members are made up of 18 national pellet associations and related organisations, from 17 countries and 4 observing members.

The European Pellet Council (EPC)
C/O European Biomass Association
2, Place du Champ de Mars, 1050
Brussels (BE)

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

Founded in 1990, AEBIOM is an international non-profit Brussels based organisation, bringing together 29 national associations and around 90 companies from all over Europe thus representing more than 4000 indirect members.



AEBIOM is an umbrella organisation for:



EUROPEAN PELLET COUNCIL
AN AEBIOM NETWORK

EPC is representing the interests of the European wood pellet sector.



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



AEBIOM STATISTICAL REPORT



EUROPEAN BIOENERGY FUTURE



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Full Members

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Associate Members

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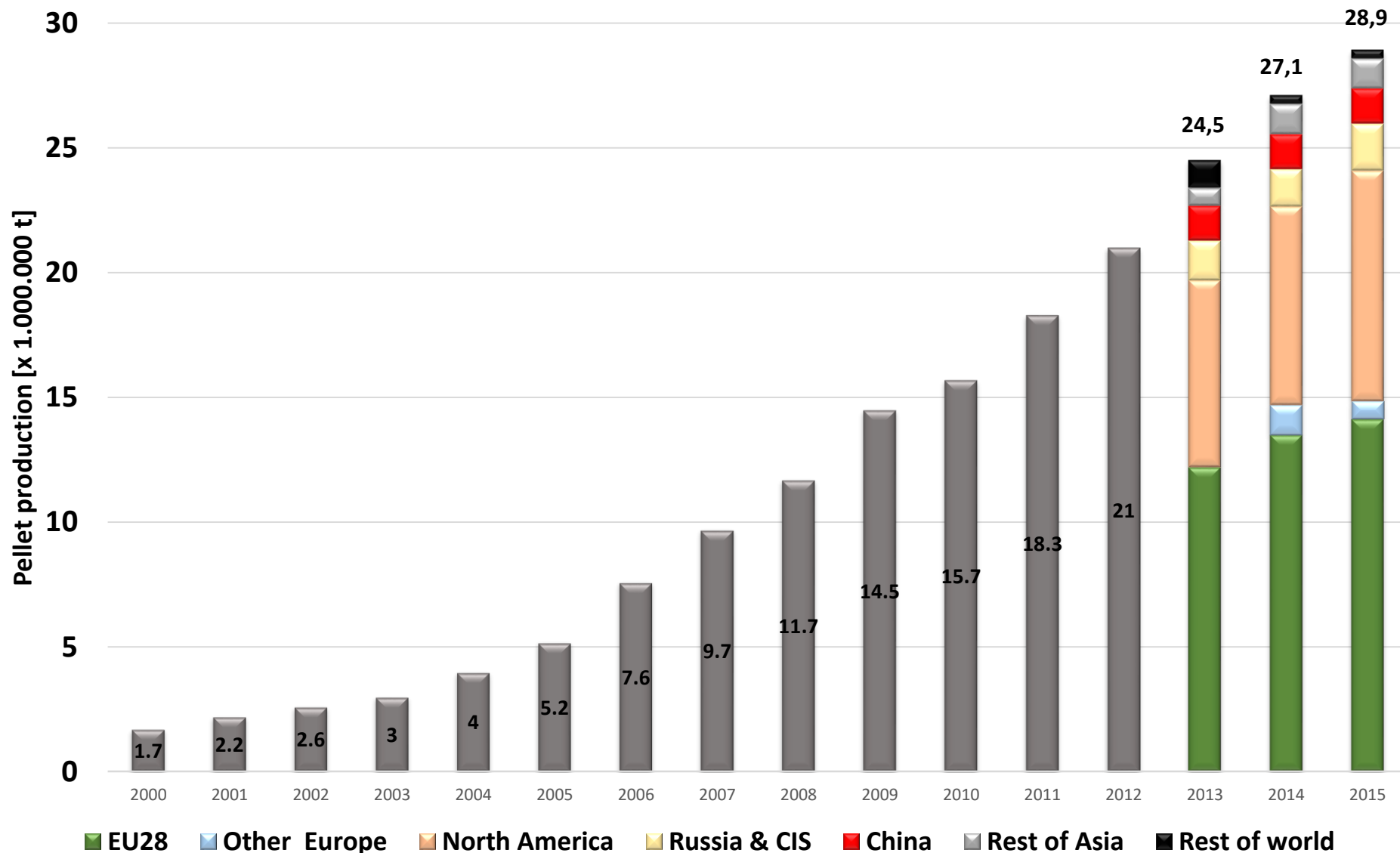
Messages

- World pellet sector is still expanding
- Europe is the biggest pellet producer in the world
- Europe is the biggest pellet user in the world
- European heating pellet sector is the biggest
- Challenging time for heating sector, 3 keys of success
 - Knowledge of sector
 - Innovation
 - Quality



Europe in the global pellet market

World pellet production 2000-2015

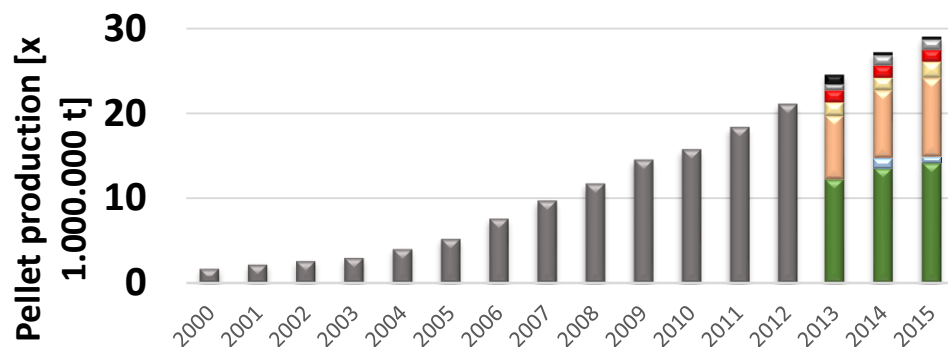


Europe in the global pellet market



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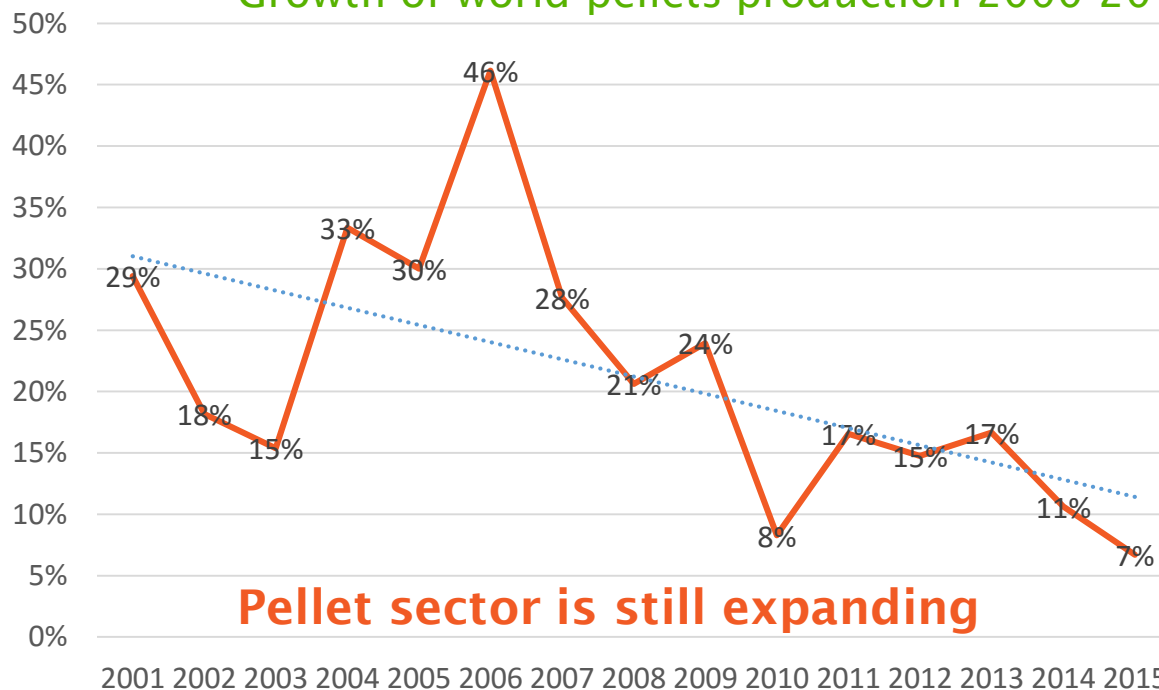
World pellet production 2000-2015



→ Europe biggest producer +/- 50%



Growth of world pellets production 2000-2015



Pellet sector is still expanding

Europe in the global pellet market

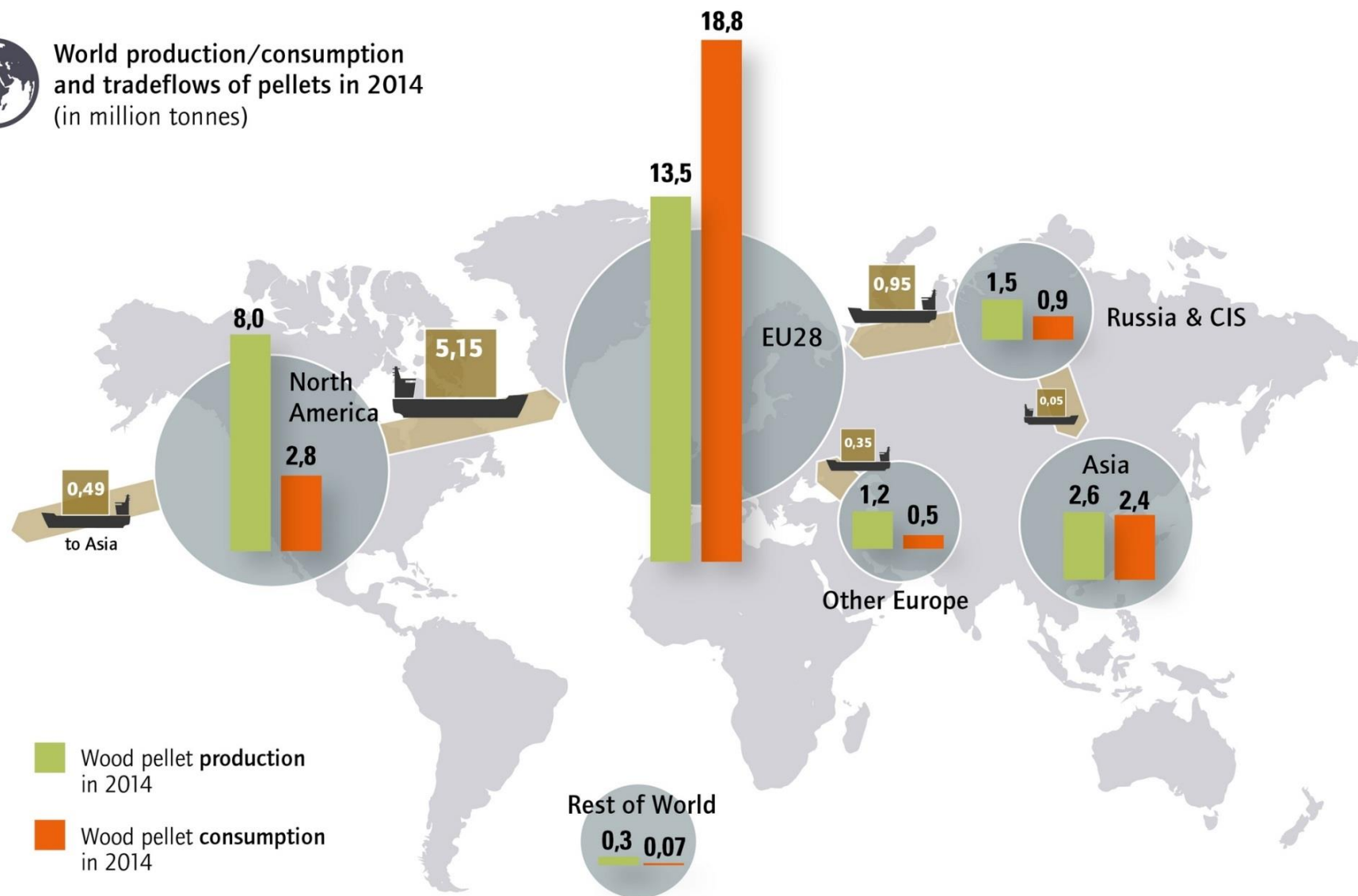


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World production/consumption
and trade flows of pellets in 2014
(in million tonnes)



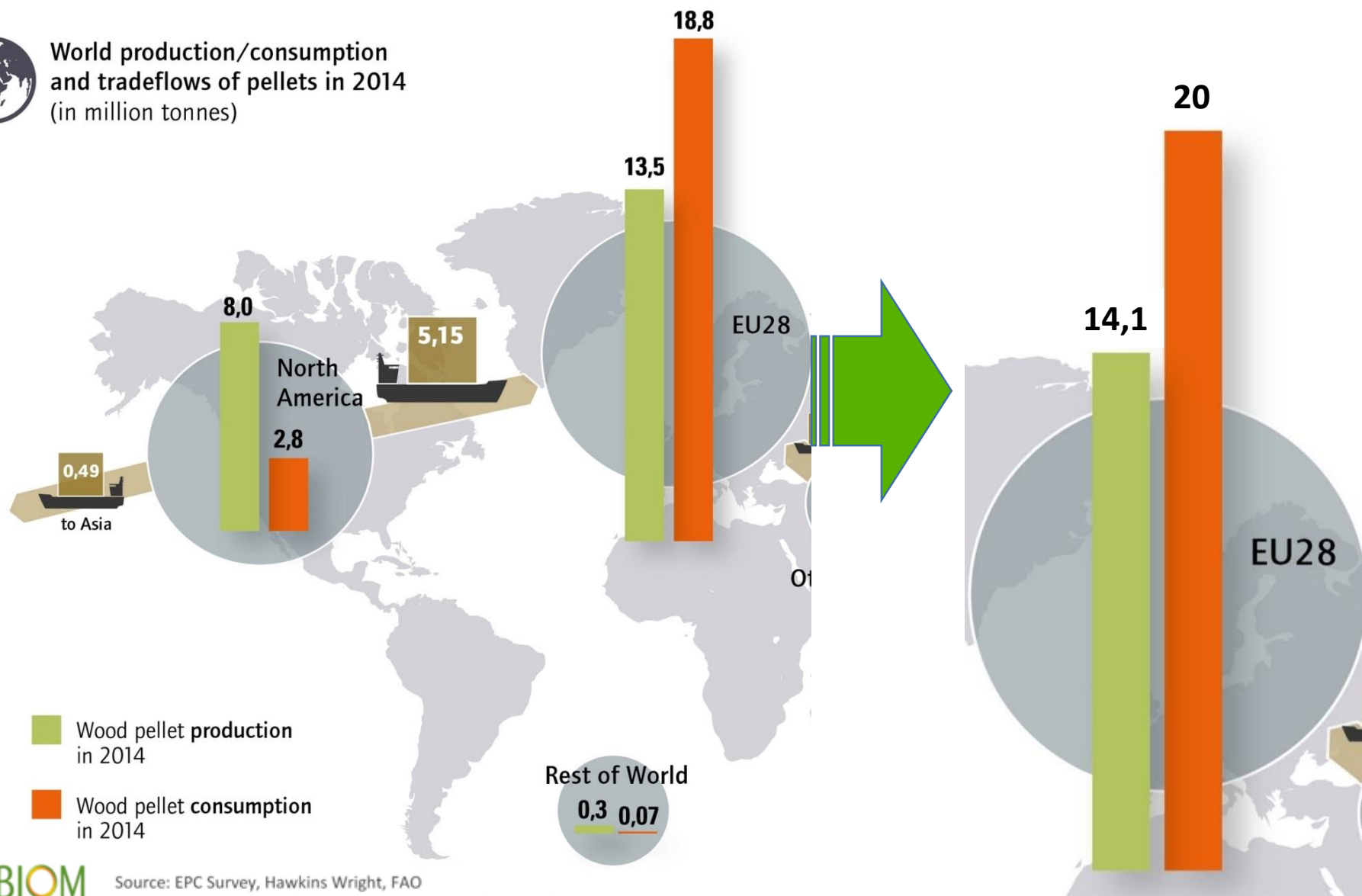
Europe in the global pellet market



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World production/consumption
and trade flows of pellets in 2014
(in million tonnes)



European pellet market overview



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European production in 2015



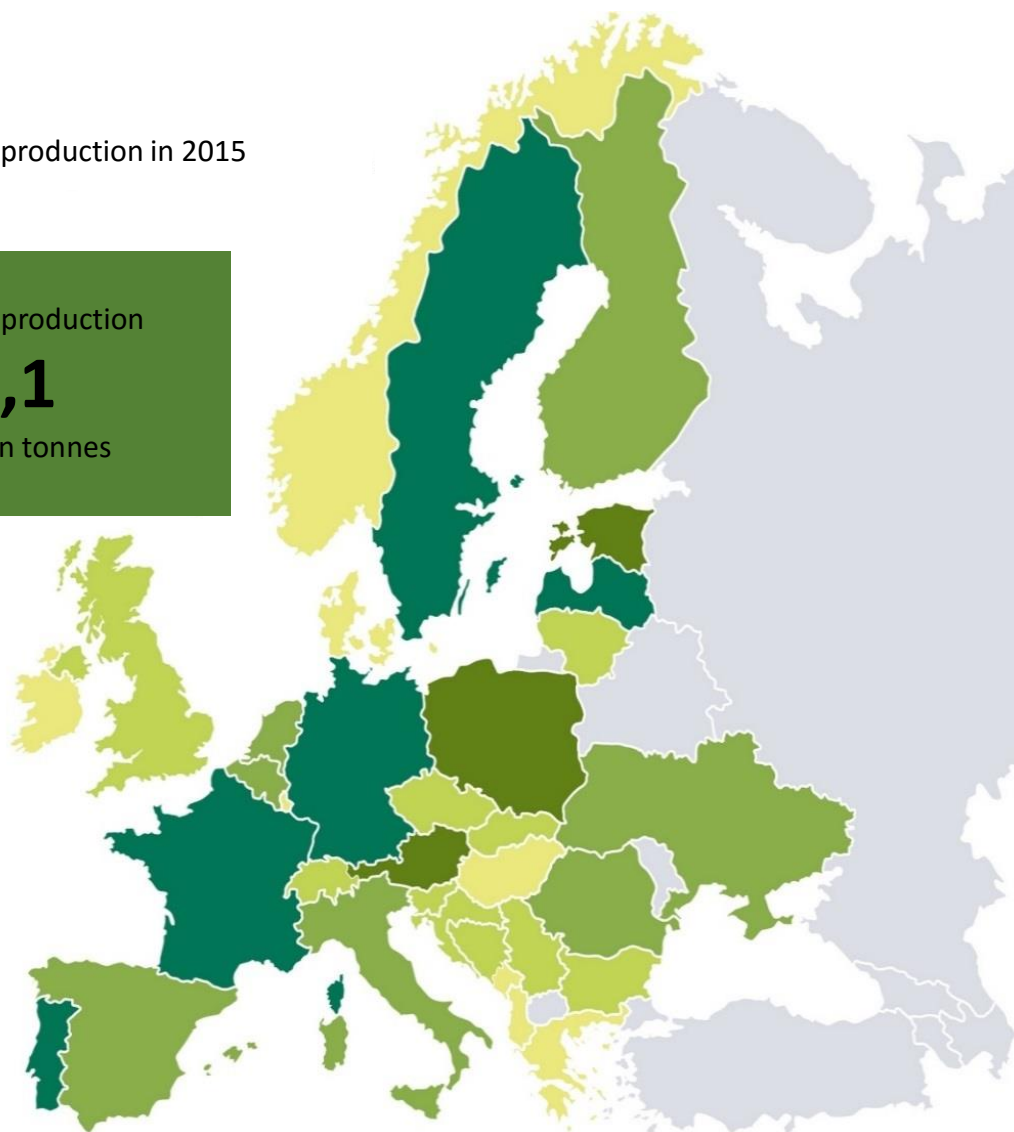
European wood pellet production in 2015

EU28 production

14,1

Million tonnes

Actual production [in tonnes]

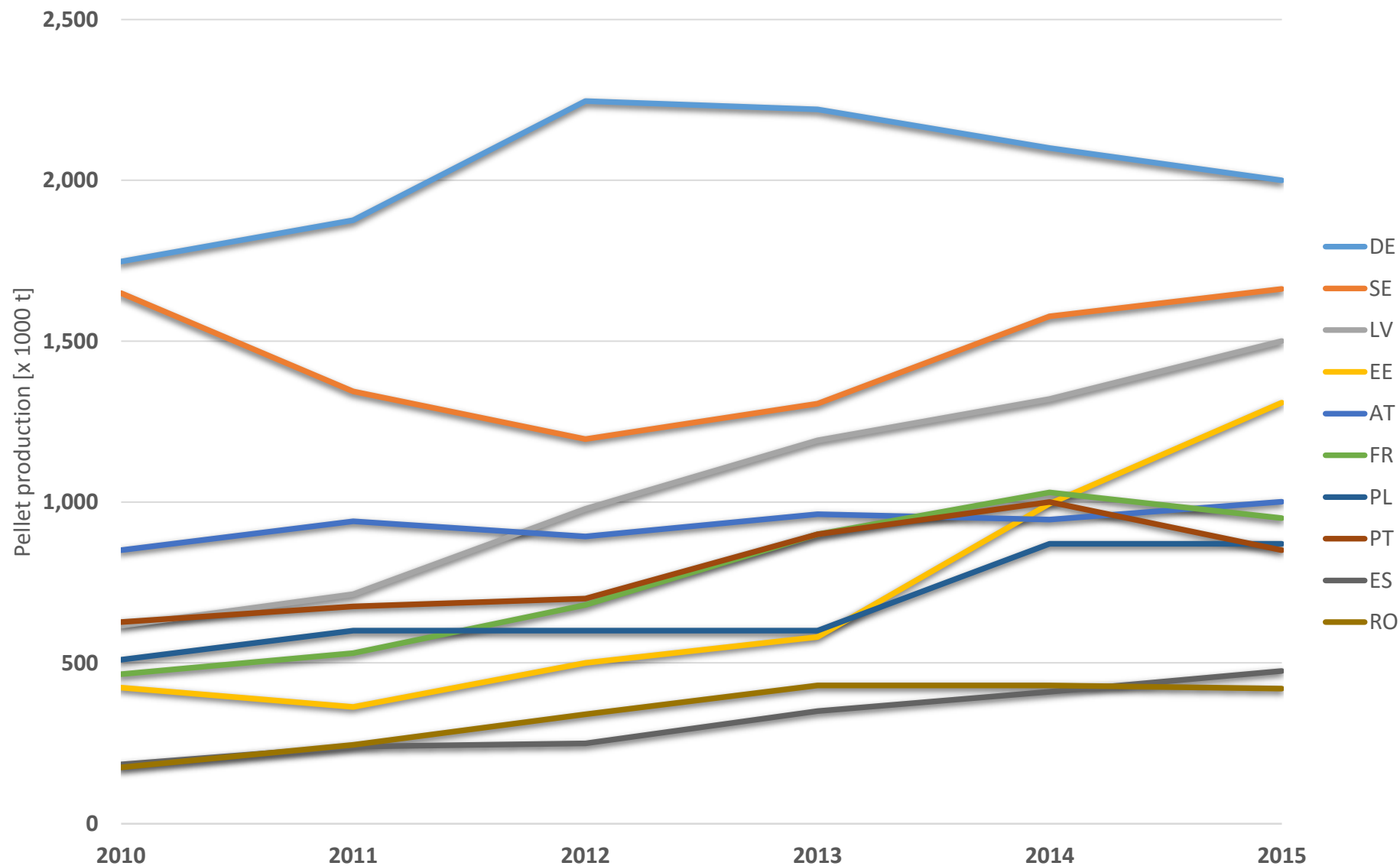


European pellet market overview



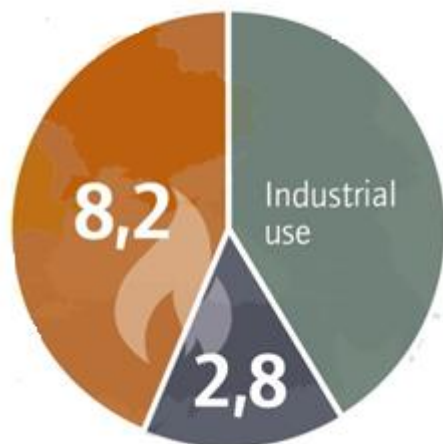
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European production 2010-2015



European pellet market overview

European consumption in 2014-2015



2014

| | |
|-------------------|------------|
| Heat sector | 11 Mio t |
| Industrial sector | 7,8 Mio t |
| TOTAL | 18,8 Mio t |

Source: EPC



2015

| | |
|-------------------|-------------|
| Heat sector | 11,5 Mio t |
| Industrial sector | 8,5 Mio t |
| TOTAL | +/-20 Mio t |

Source: EPC

**Heating sector is the biggest
sector in pellet European market**

European pellet market overview



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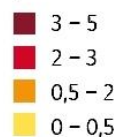
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European industrial sector

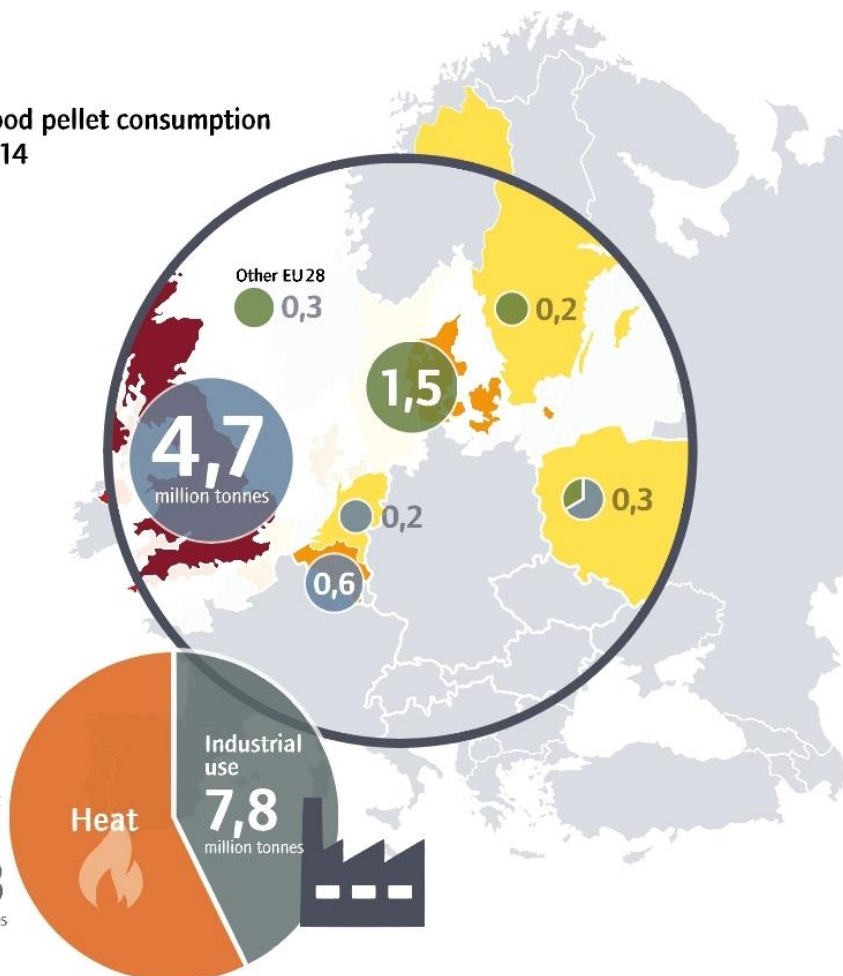


Industrial wood pellet consumption in Europe 2014

Actual consumption
(million tonnes)



● Power
● CHP



2015

TOTAL 8,5 Mio t

- UK 5,7 Mio t
- DK 1,5 Mio t
- BE 1 Mio t
- Other 0,3 Mio t

Source: EPC

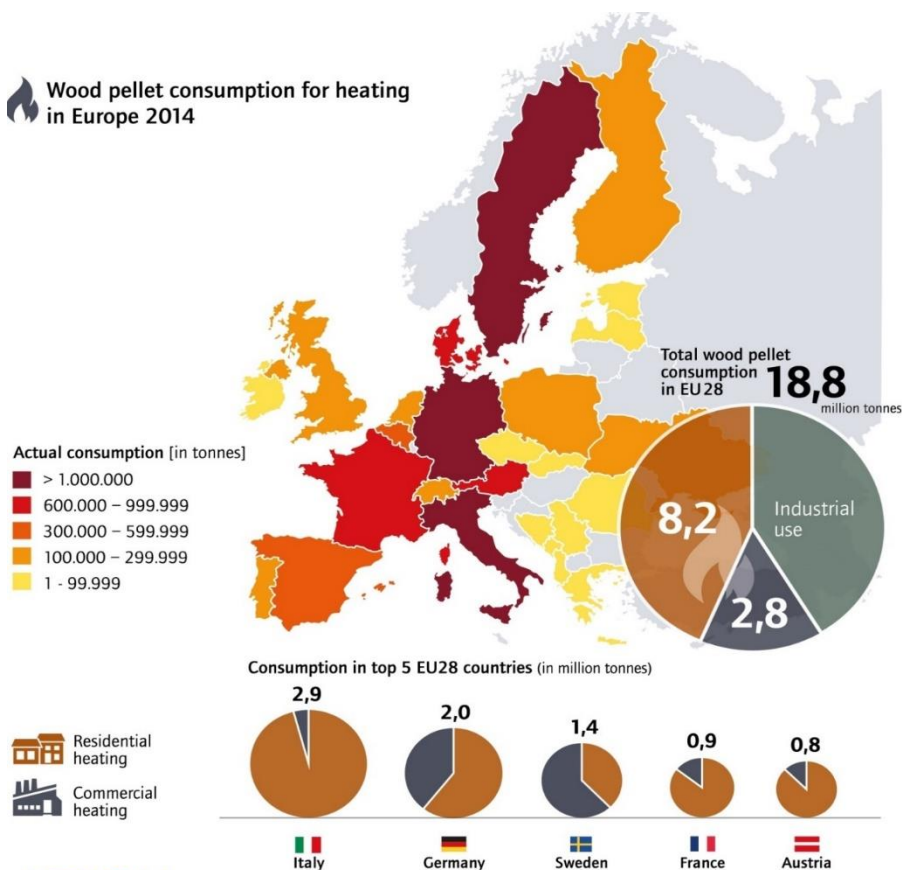
2014-2015

=> Growth +/- 9 %

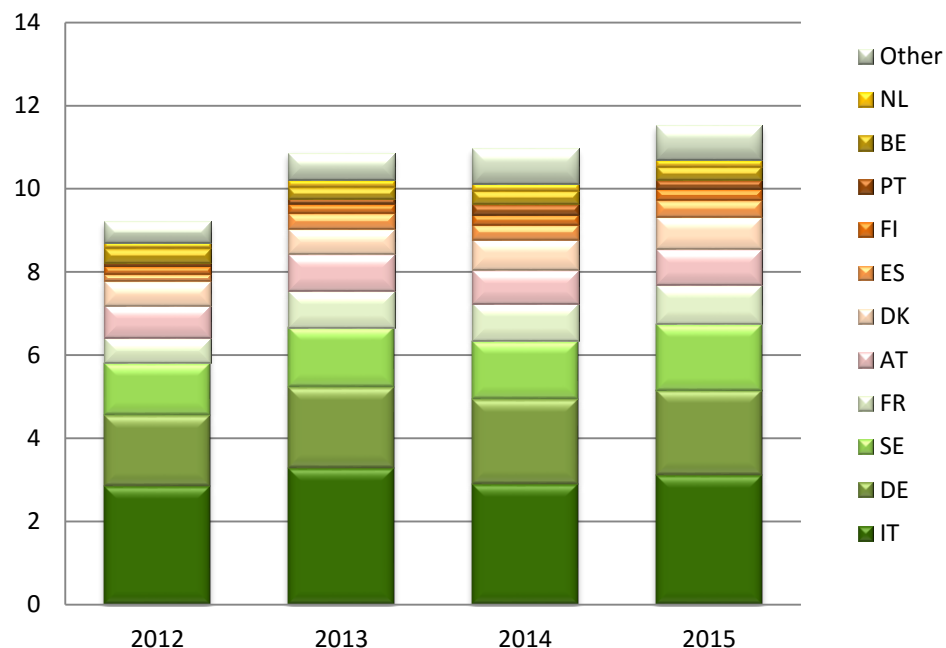
European pellet market overview

European heating sector

 Wood pellet consumption for heating in Europe 2014



Source: EPC Survey
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2014-2015

11 Mio tonnes to 11,5 Mio tonnes

=> Growth +/- 5 %

European pellet market overview



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Flattening of European market

Mild winters



Heating oil price drop



Competition vs (RE) technologies

Innovation is key

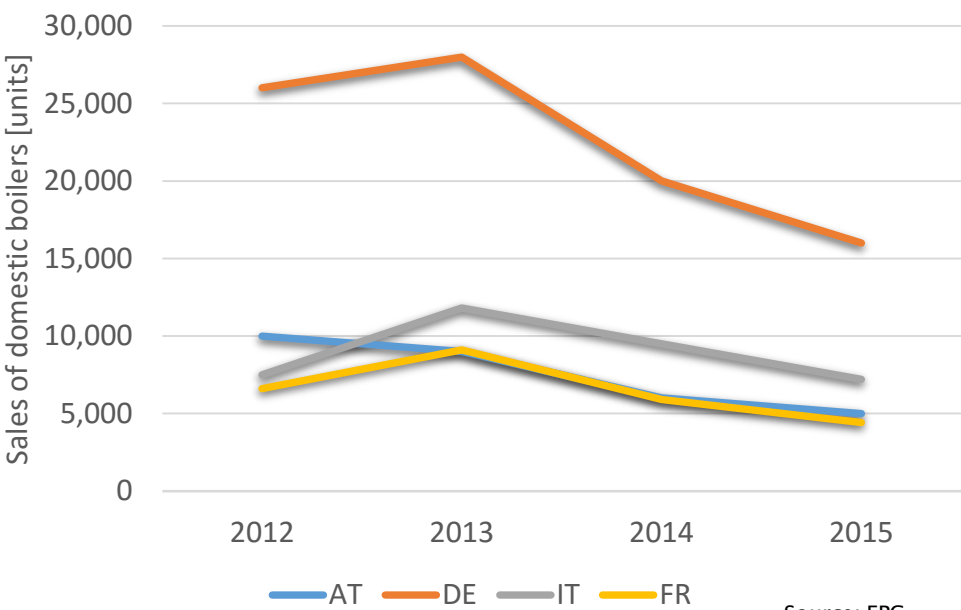
- Technology
- Market
- Marketing/communication

Market knowledge is key

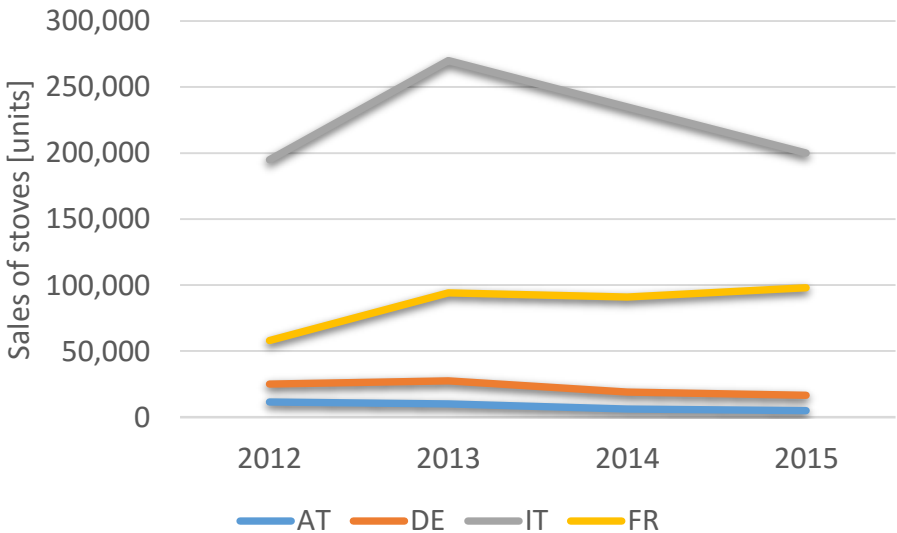


European pellet market overview

Sales of domestic pellet boilers



Sales of pellet stoves



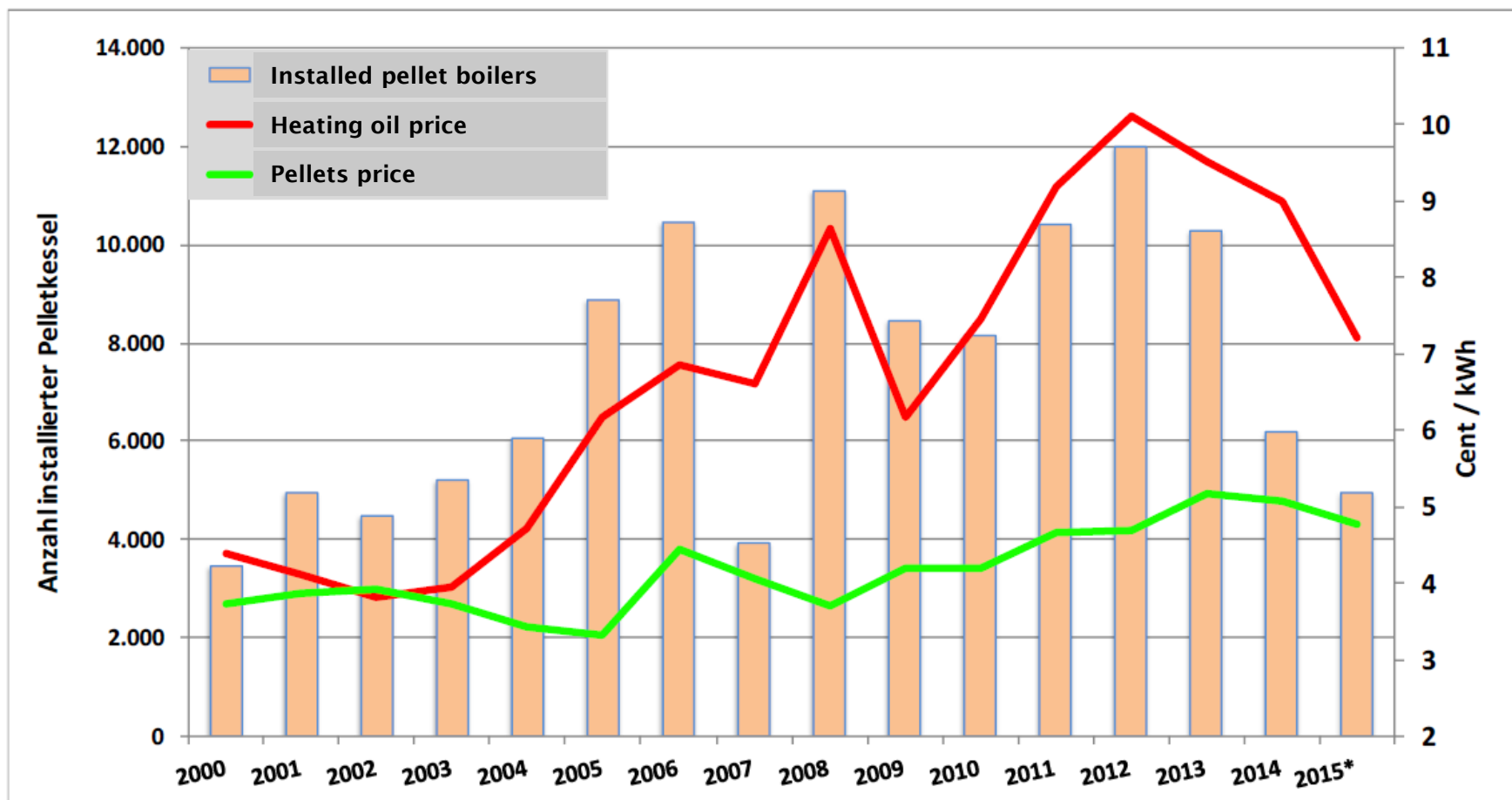
European pellet market overview



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Heating pellet appliances sales



Source: proPellets Austria

Pellet quality ENplus

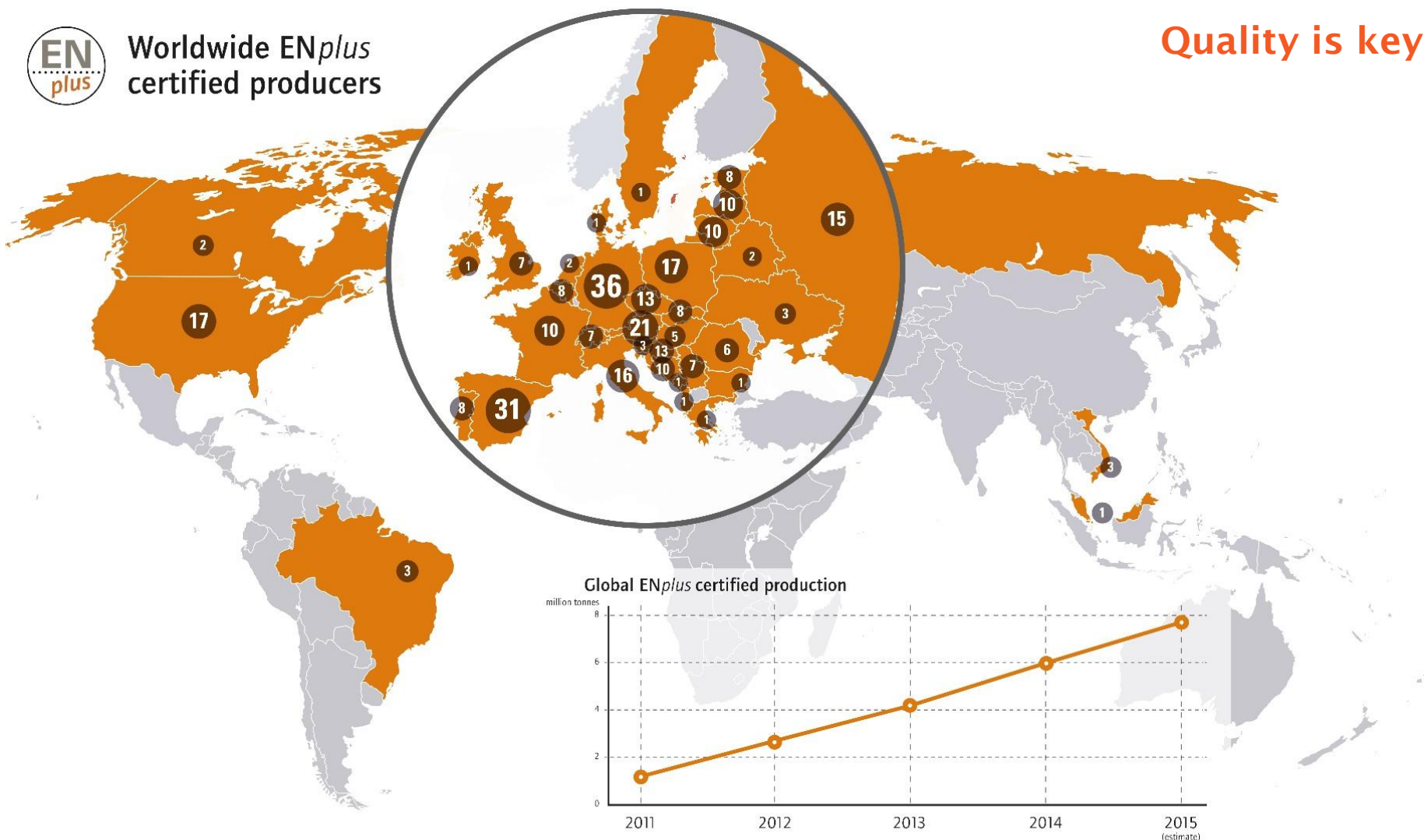


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Worldwide ENplus
certified producers

Quality is key



AEBIOM statistical report 2016 launch



www.aebiom.org/statistical-report-2016





EUROPEAN BIOENERGY FUTURE

2016 AEBIOM CONFERENCE
"Where Market & Policy Meet"



16 & 17 November 2016



MCE Conference & Business Centre
Brussels

For more information, contact aveni@aebiom.org

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EUROPEAN BIOMASS ASSOCIATION



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Thanks for your attention

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