



Transparency for the European Pellets Market

Overview

www.pelletsatlas.info

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Pellets@las - AIM

- Transparency for the European pellet market (EU27+2)
 - Collect and provide information
 - Producers, traders, consumers
 - Prices & volumes
 - International trade
 - Data analysis
 - Describe situation in all European countries
 - Show the big picture for Europe
 - Investment and trade opportunities
 - Update on recent developments: policies, pellet quality, etc.
 - Identify problematic issues and recommend solutions



Partners



Universiteit Utrecht



ADEME



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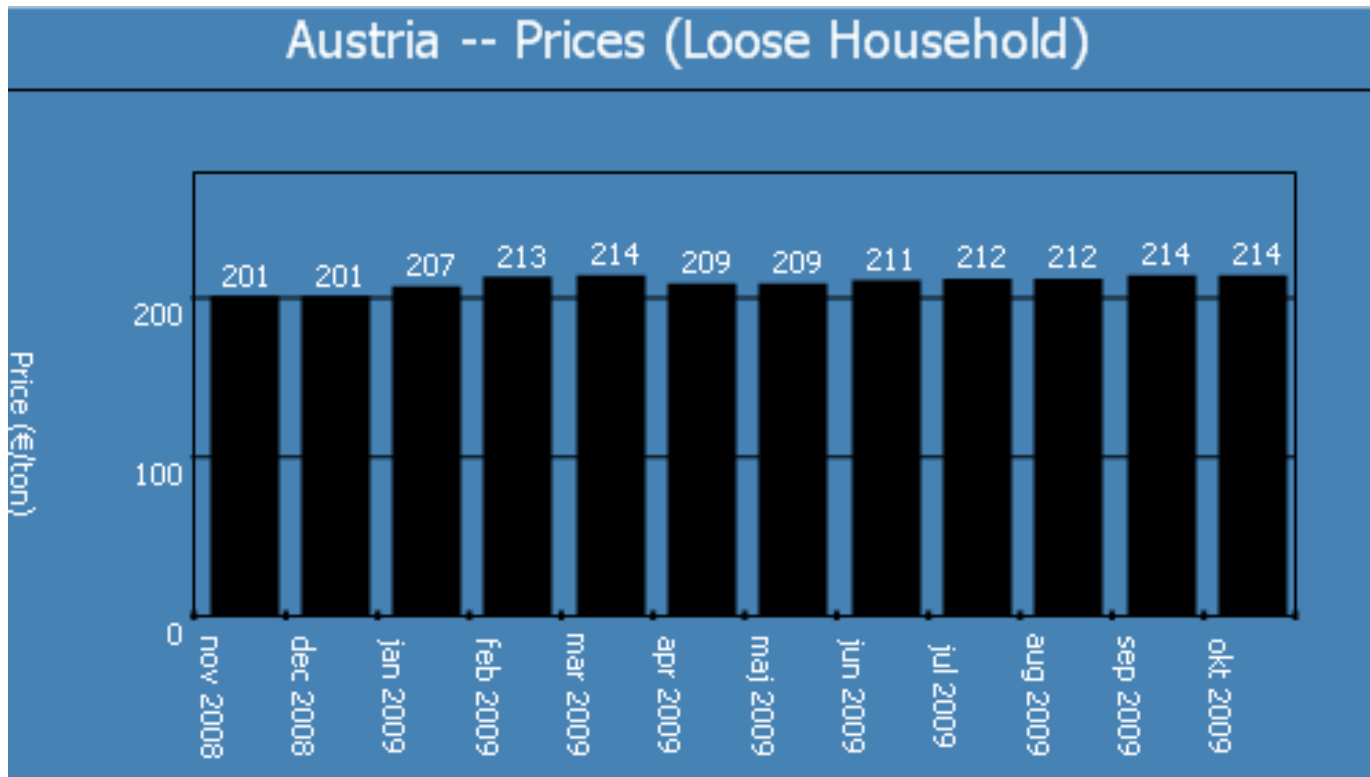


Pellets@las - Methodology

- 27 EU member states, NO, CH;
- Existing data
- Questionnaires
- Quarterly market survey
- Producers, traders and large scale consumers
- Monthly prices
- Produced / traded / consumed quantities

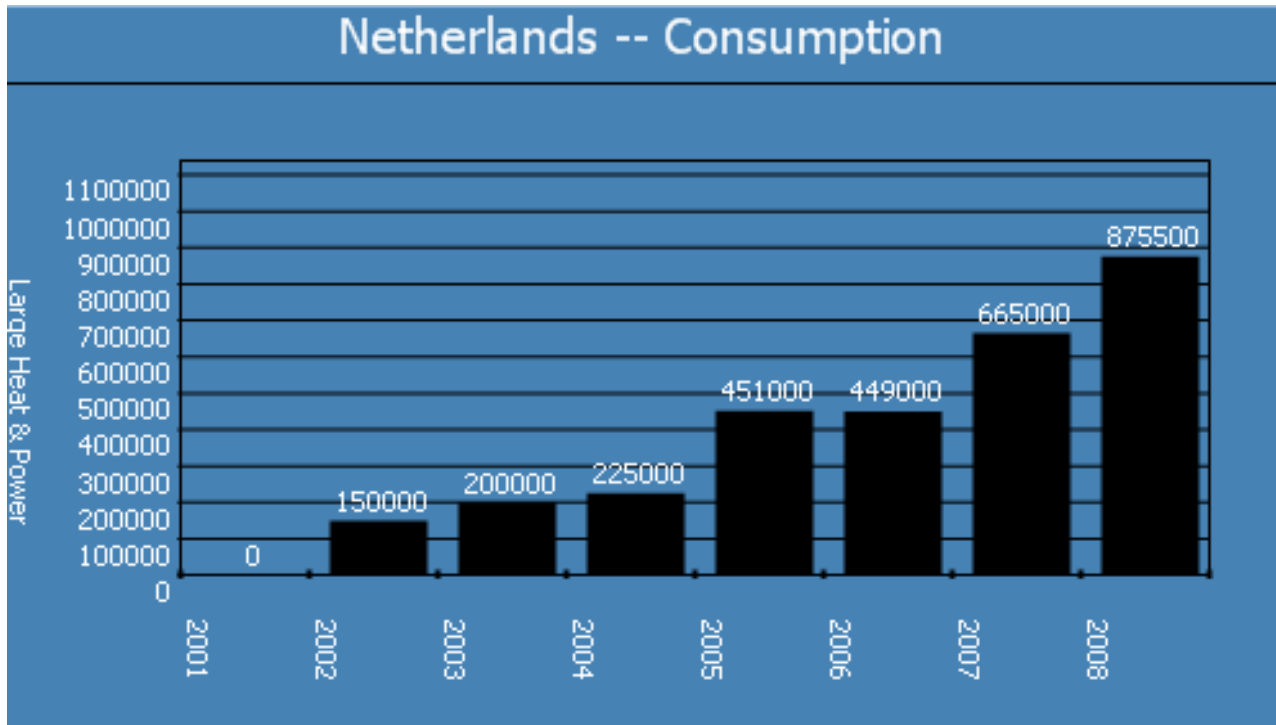


Pellets@las – Results (Examples)



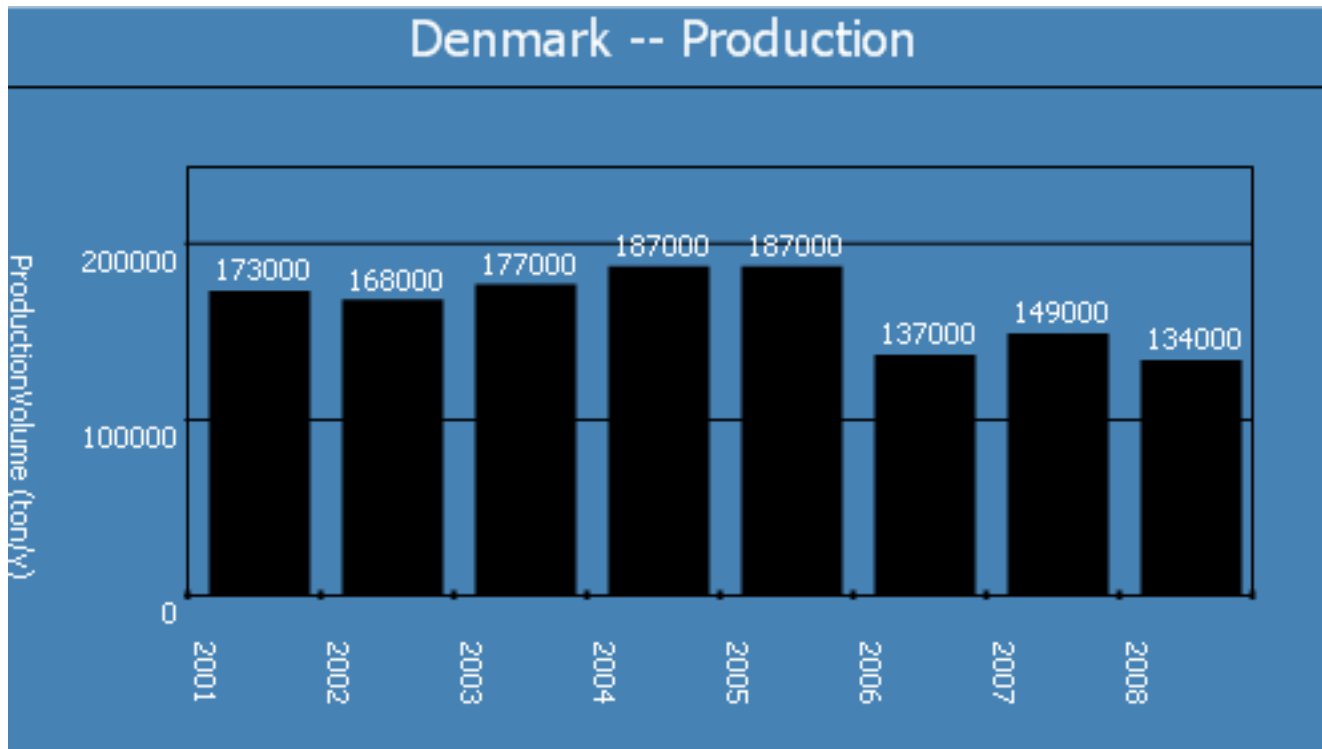


Pellets@las – Results (Examples)



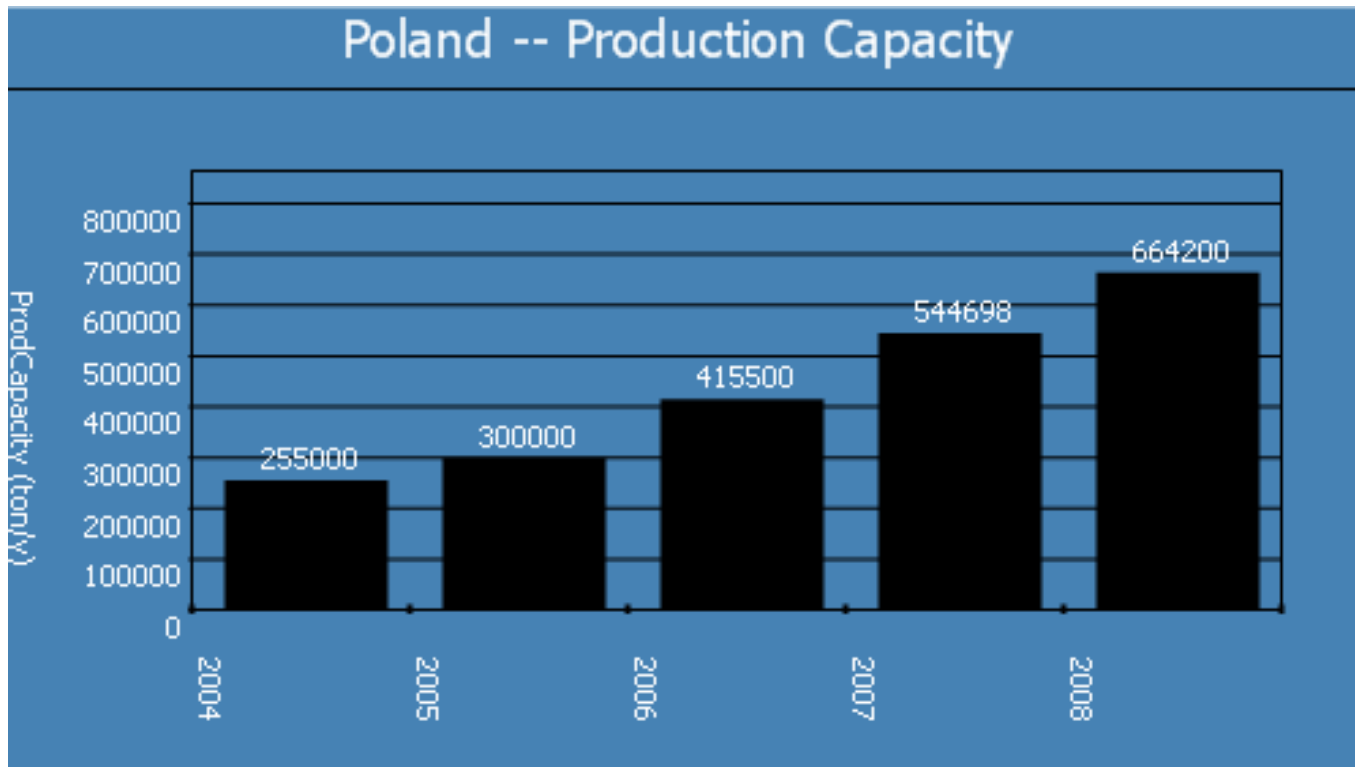


Pellets@las – Results (Examples)





Pellets@las – Results (Examples)





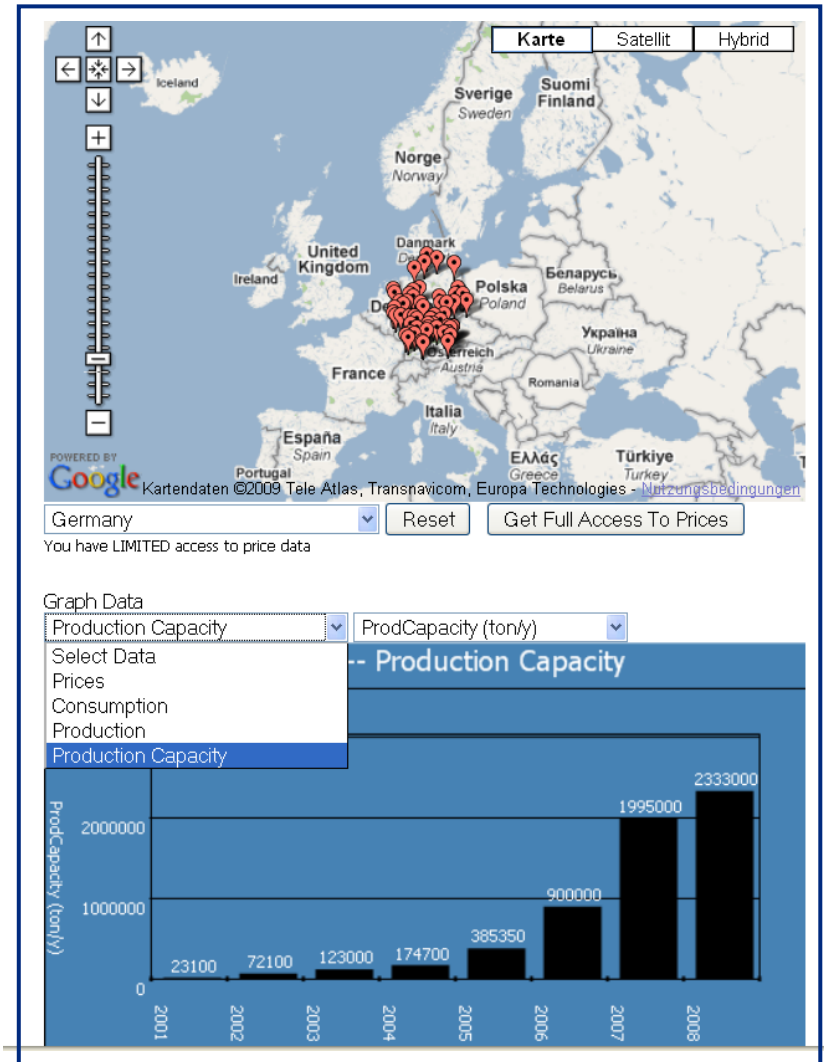
Pellets@las - Dissemination

- Newsletters, Events, Articles, Hotline
- Workshops
- Databases at **www.pelletsatlas.info**:
 - Market Actors Database
 - Database for prices and volumes



Pellets@las – Dissemination

www.pelletsatlas.info





Pellets@las – Analysis: Country reports

Romania

- Large, unutilized bioenergy potential
- „Romanian Strategy for Renewable Energy Sources Utilisation” / “Energy efficiency program for 2009-2010”
- Subsidies
- Production capacities increase rapidly:
20 sites with ~260,000 tons in 2008 (2004: ~30,000 tons)
- Low domestic demand (heat for industry, DH, residential)
- Largest part of production is exported (IT, AT, DE, etc.)
- Further, rapid growth expected
- New pellet industry association

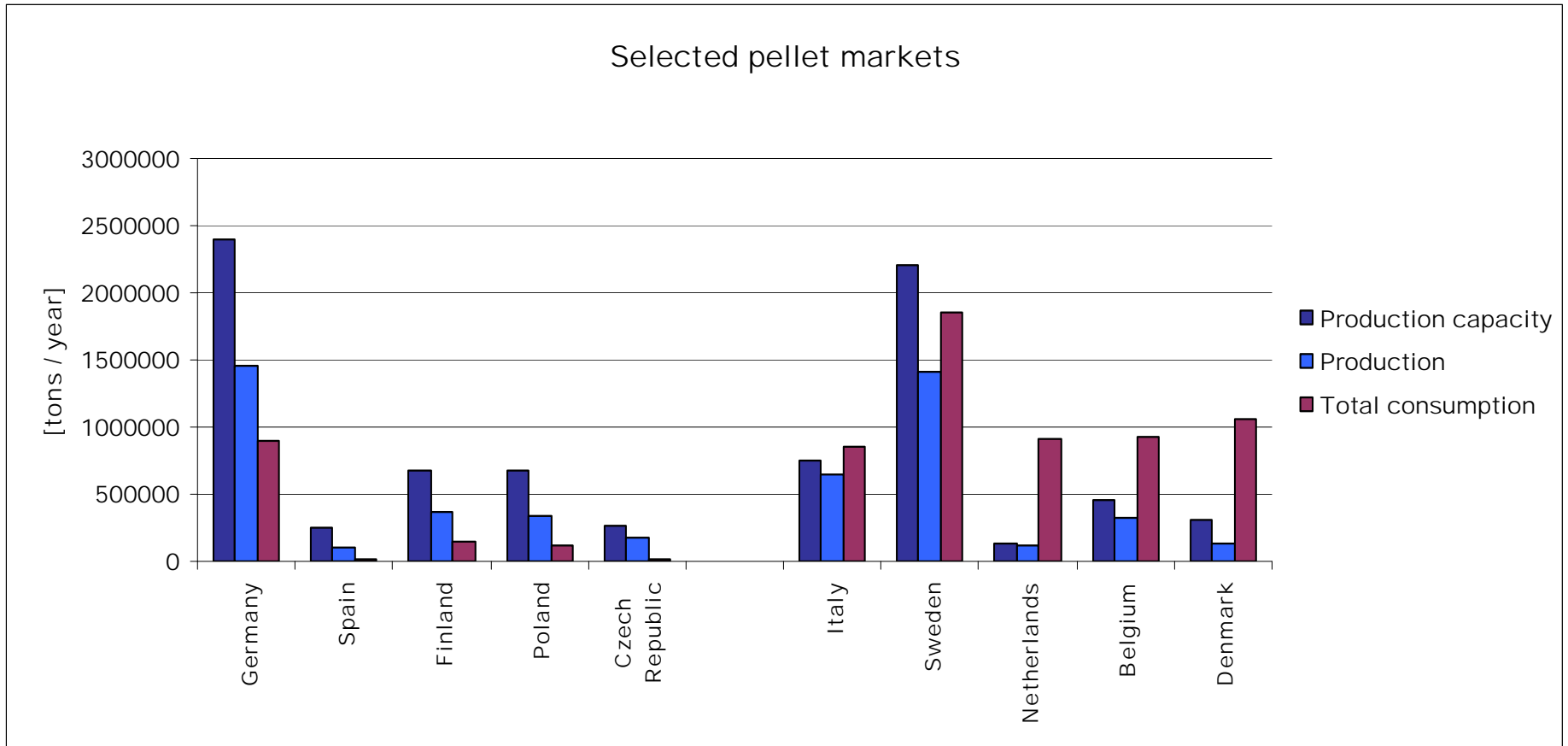


Pellets@las – Analysis: Europe

- Total consumption > 8 million t
- Industrial consumption equals residential consumption
- Production does not satisfy demand
- More high quality pellets than industrial pellets produced
- Balance: Industrial pellets imported from Canada etc.

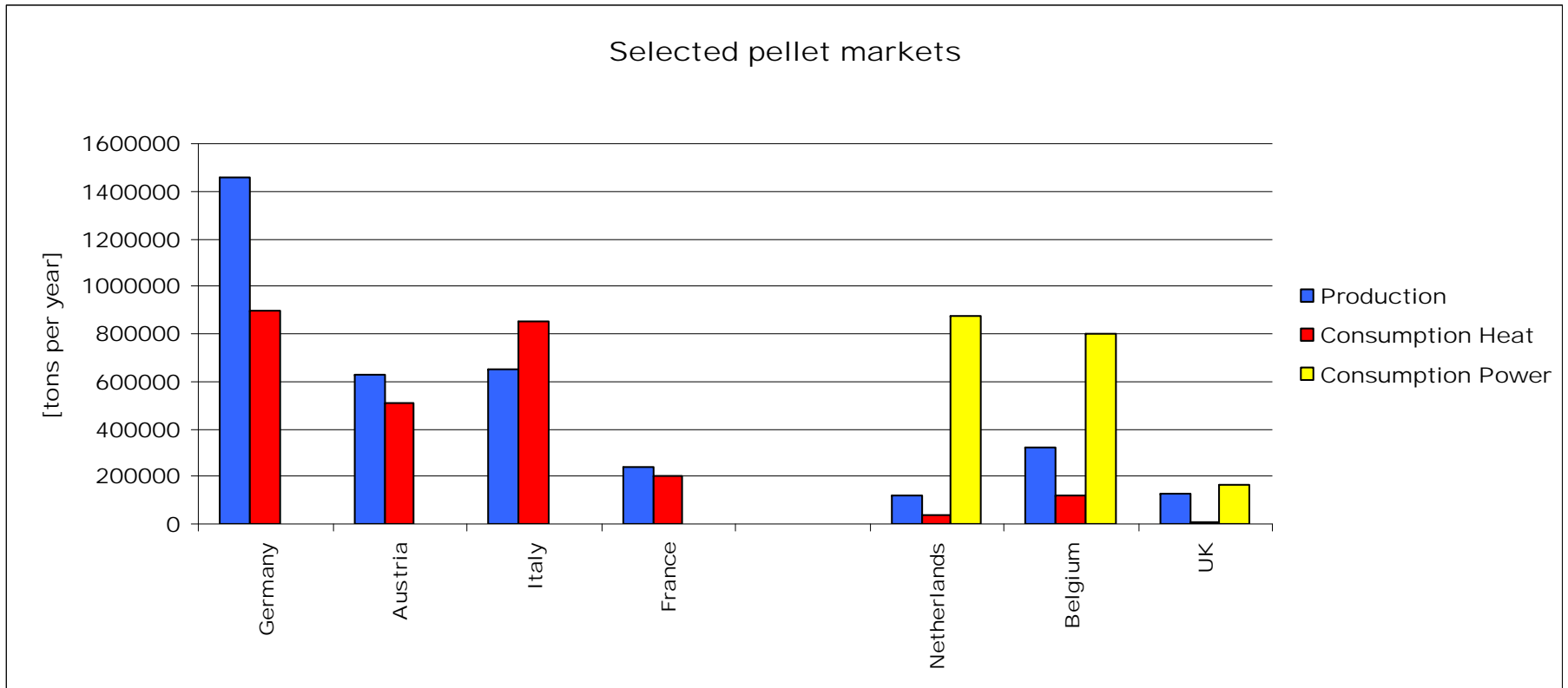


Market types





Market types



2008 data



International pellet trade

- International trade with industrial pellets
- What about trade with high quality (certified) pellets?

Pellet quality

- New EU quality standards
- New certification system



MBP: mixed biomass pellets

- Huge potential – slow development
- Data collections – report
- Legal framework analysis for MBP usage
- Feasibility studies for MBP production



Outlook

- Project ends in Dec 2009
- Industrial pellet price indices are being developed
- Data collection initiatives in numerous countries
- ENplus certification: data provision
- Cooperation with national associations
- Setup of EU association
- DG TREN Market observatory
- Database with market actors



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Thank you!

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