

Overview of current developments in the wood pellet industry and market

IEA Bioenergy TASK 40

Sustainable International Bioenergy Trade - Securing Supply and

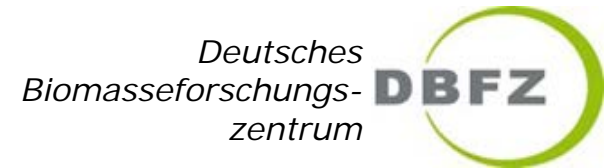
Task 40 – Sustainable biomass market and International trade to support the biobased economy

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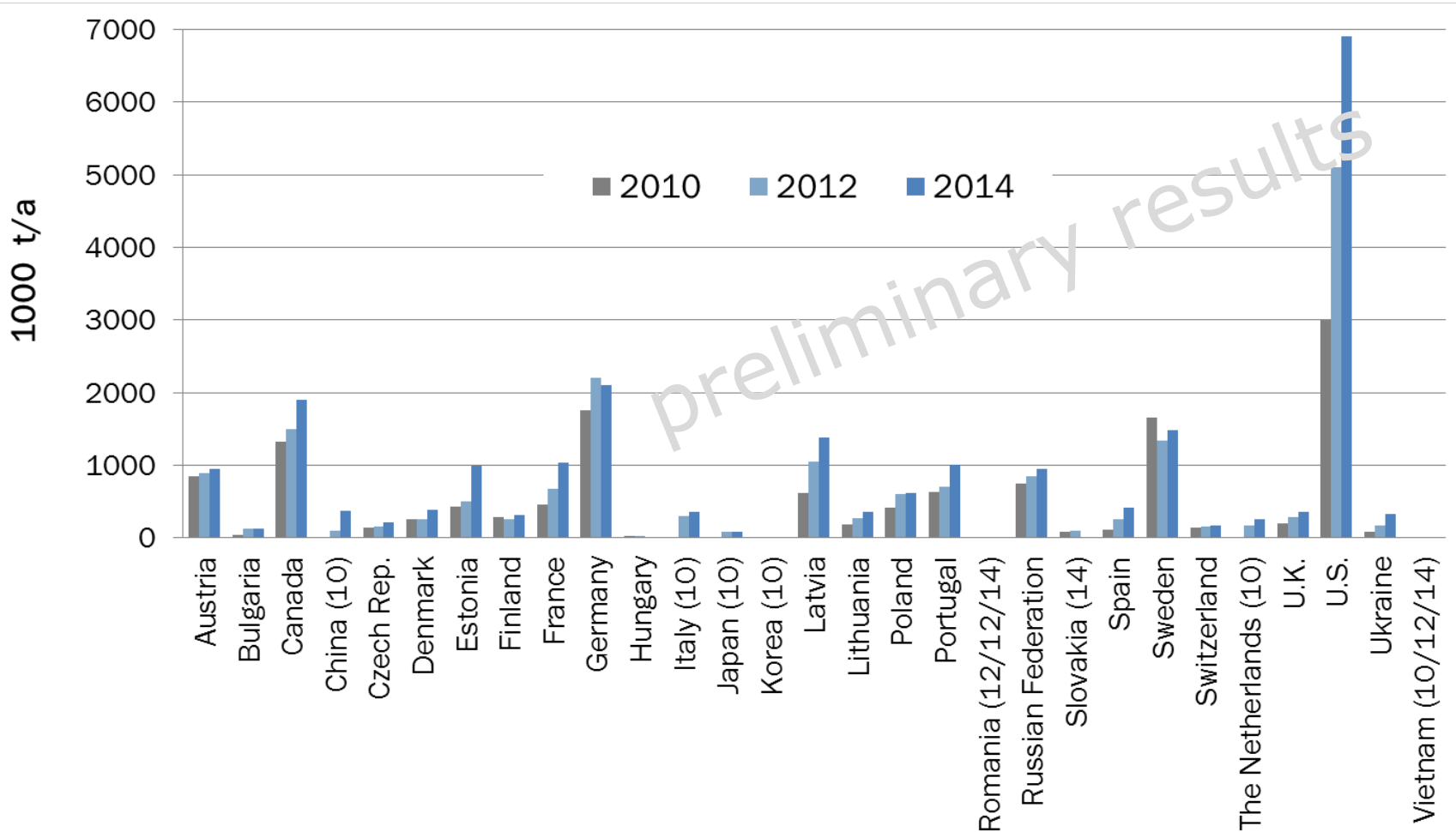


<http://m.bioenergytrade.org/members.html>

Global wood pellet industry and market

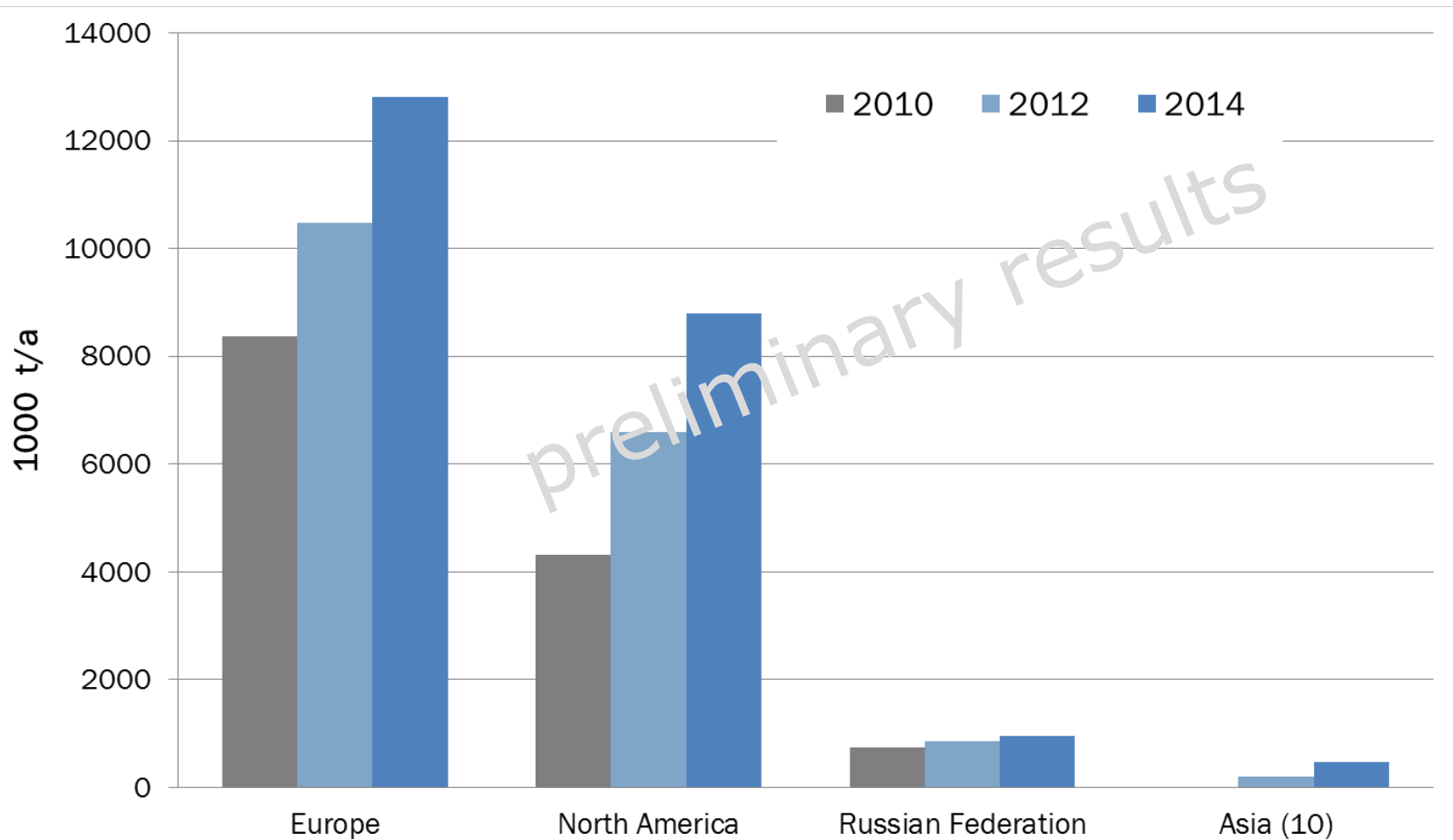
CURRENT DEVELOPMENTS

Wood pellet production by country

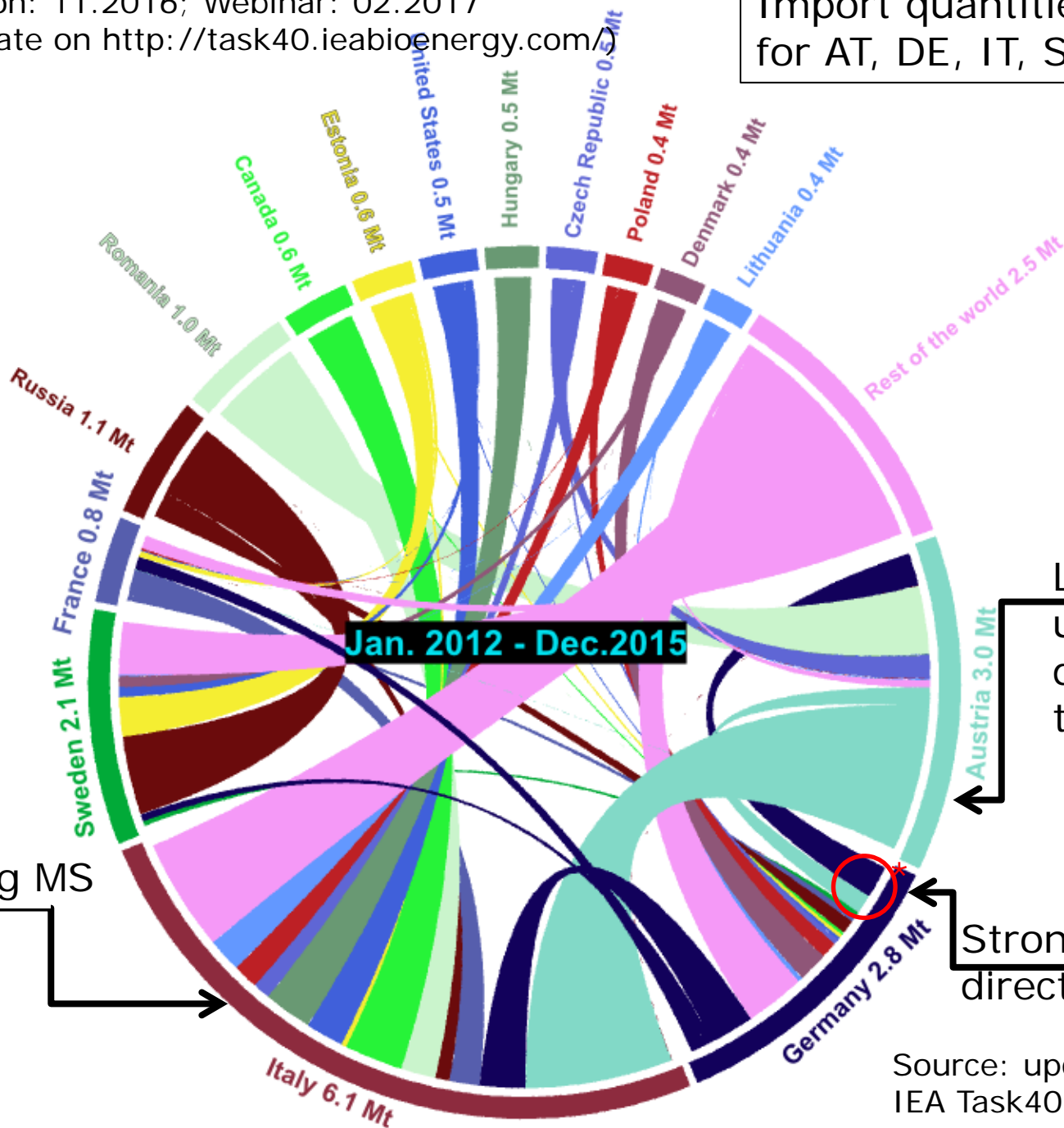


preliminary results

Wood pellet production by continent



Import quantities
for AT, DE, IT, SE & FR



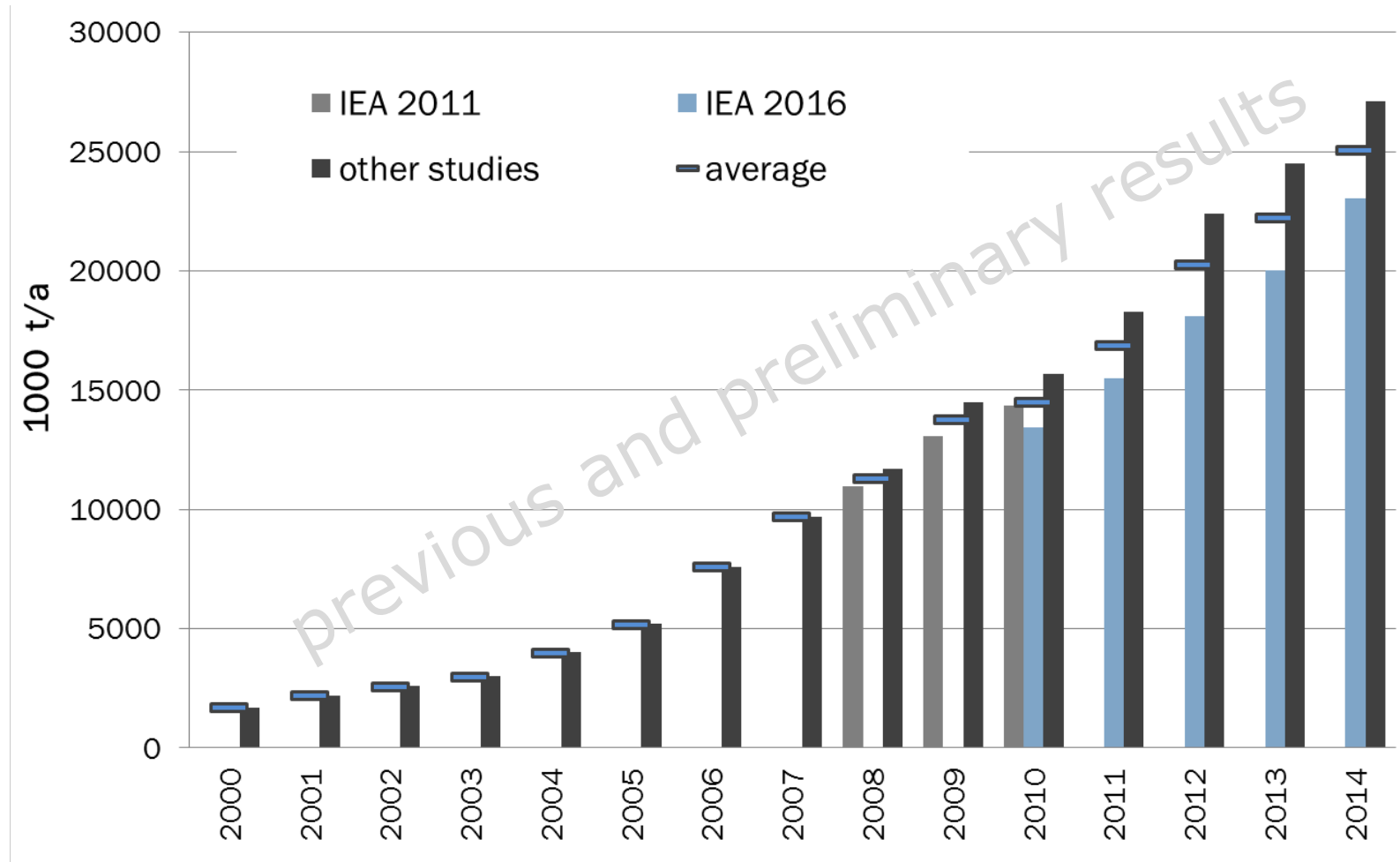
Main receiving MS

Largest uni-directional trade

Strongest bi-directional trade

Source: upcoming IEA Task40 study

Global wood pellet production by year



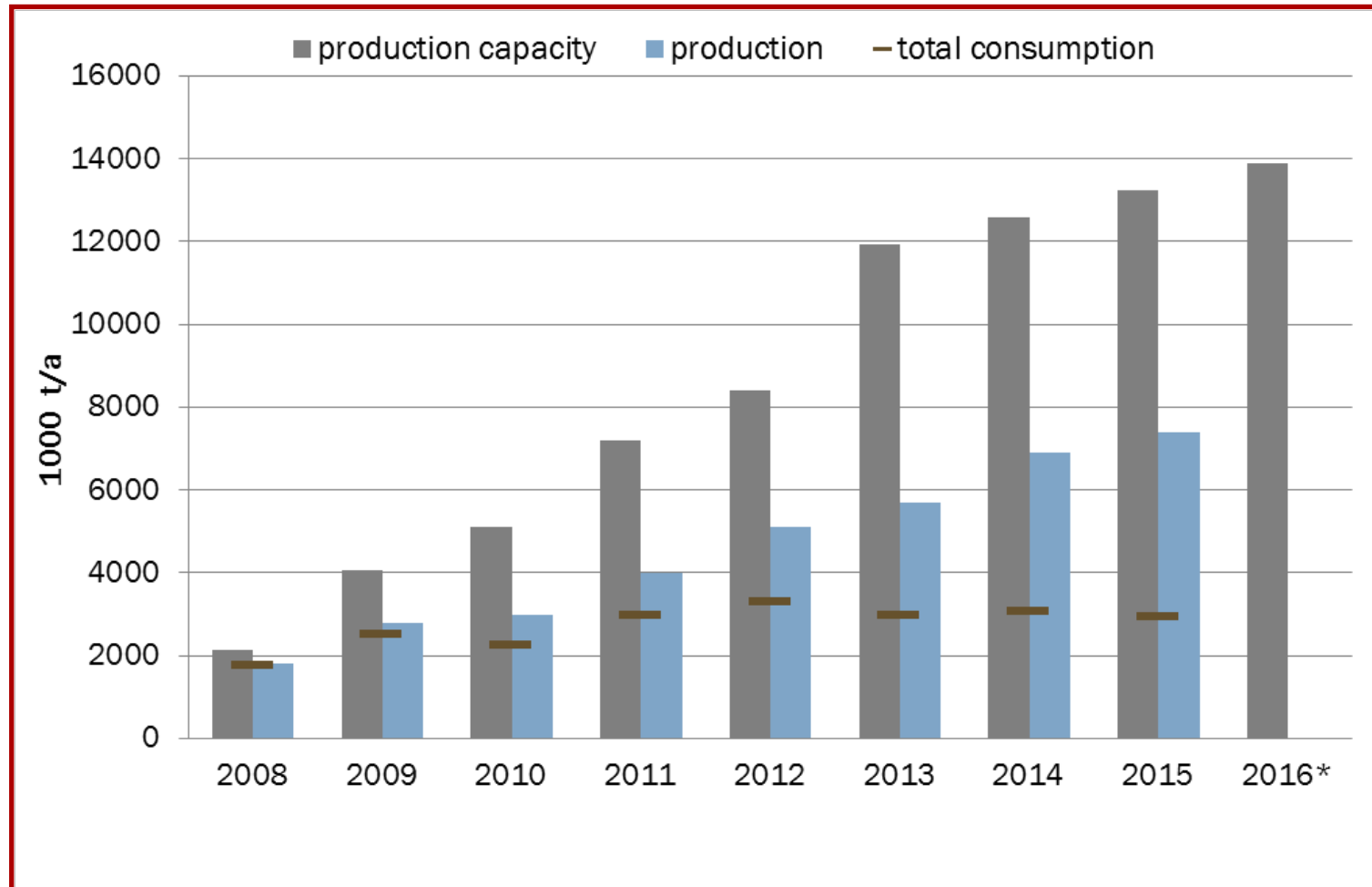
Wood pellet industry and market

COUNTRY REPORTS

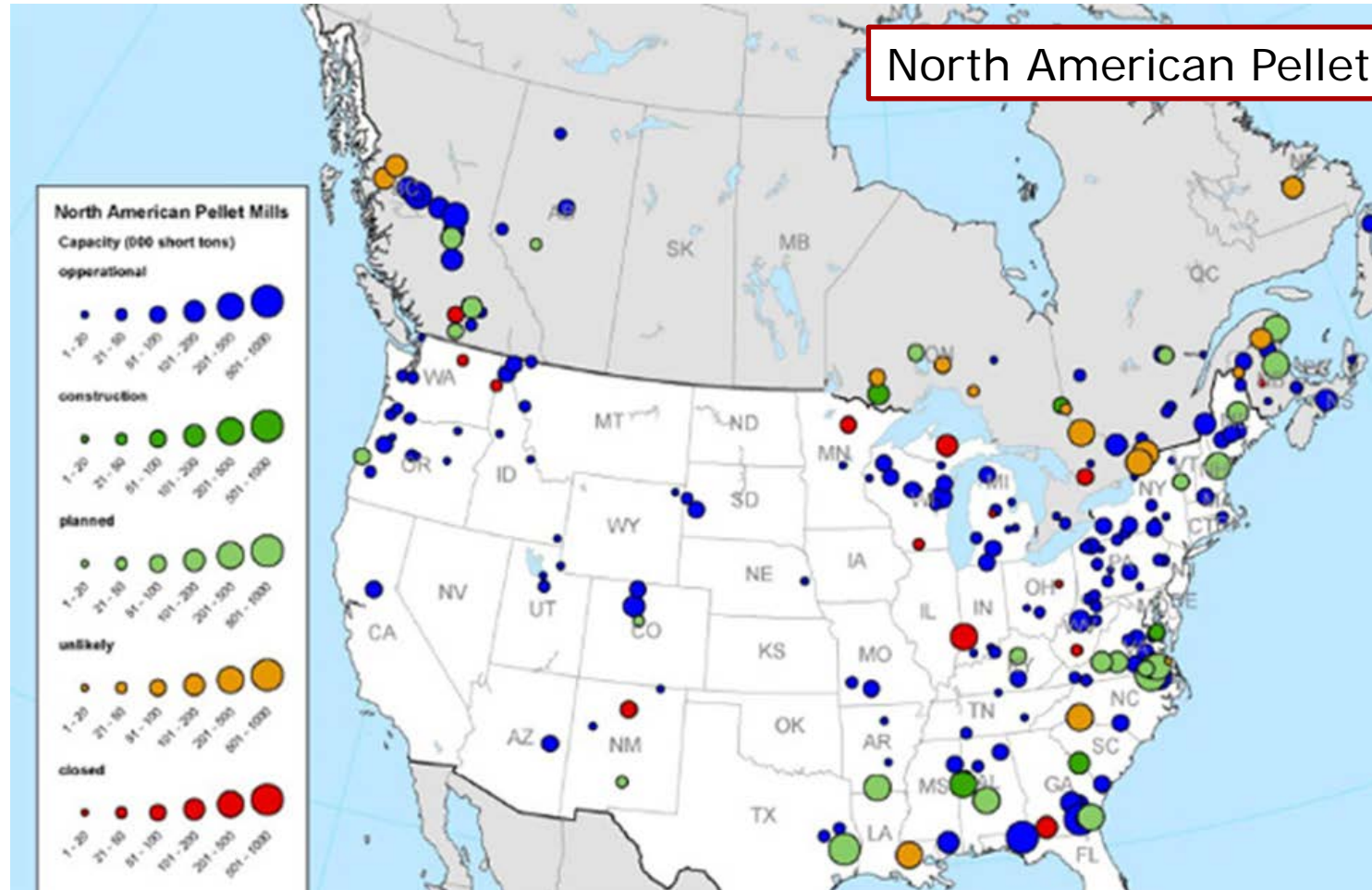
Country Reports

- Numerous experienced task members from academics and industry collaborated intensively and combined pellet market data of 30 countries
- These contain updated information about:
 - Regulatory framework, market drivers and barriers
 - Production capacity, production and feedstock
 - Consumption
 - Price trends
 - Trade and logistic aspects
 - Pellet quality standard

Production capacity, production and feedstock USA



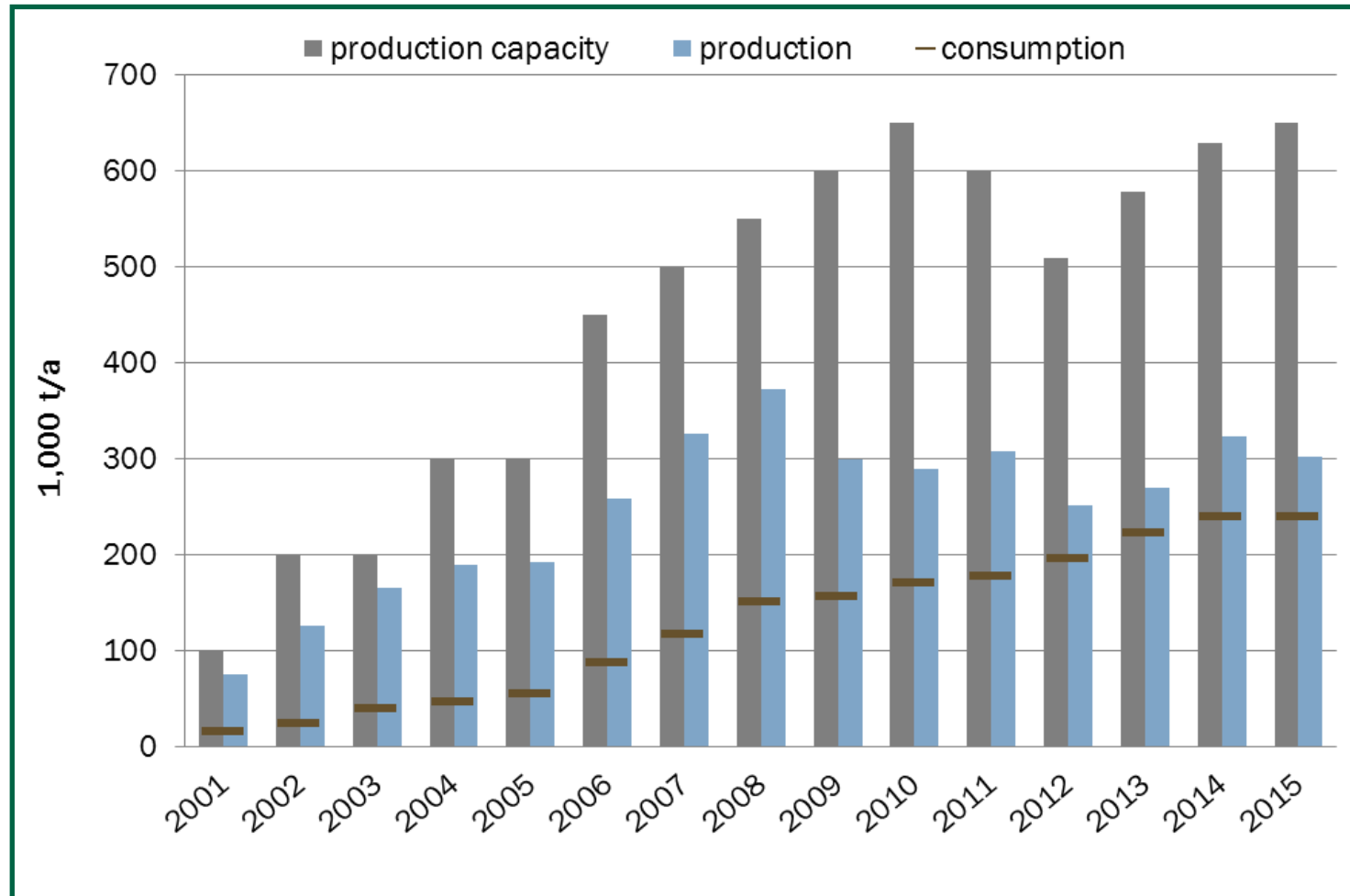
Production capacity, production and feedstock USA



Source: <http://i.bnet.com/blogs/north-american-pellet-mills.jpg>

<http://task40.ieabioenergy.com/>

Production capacity, production and feedstock Finland

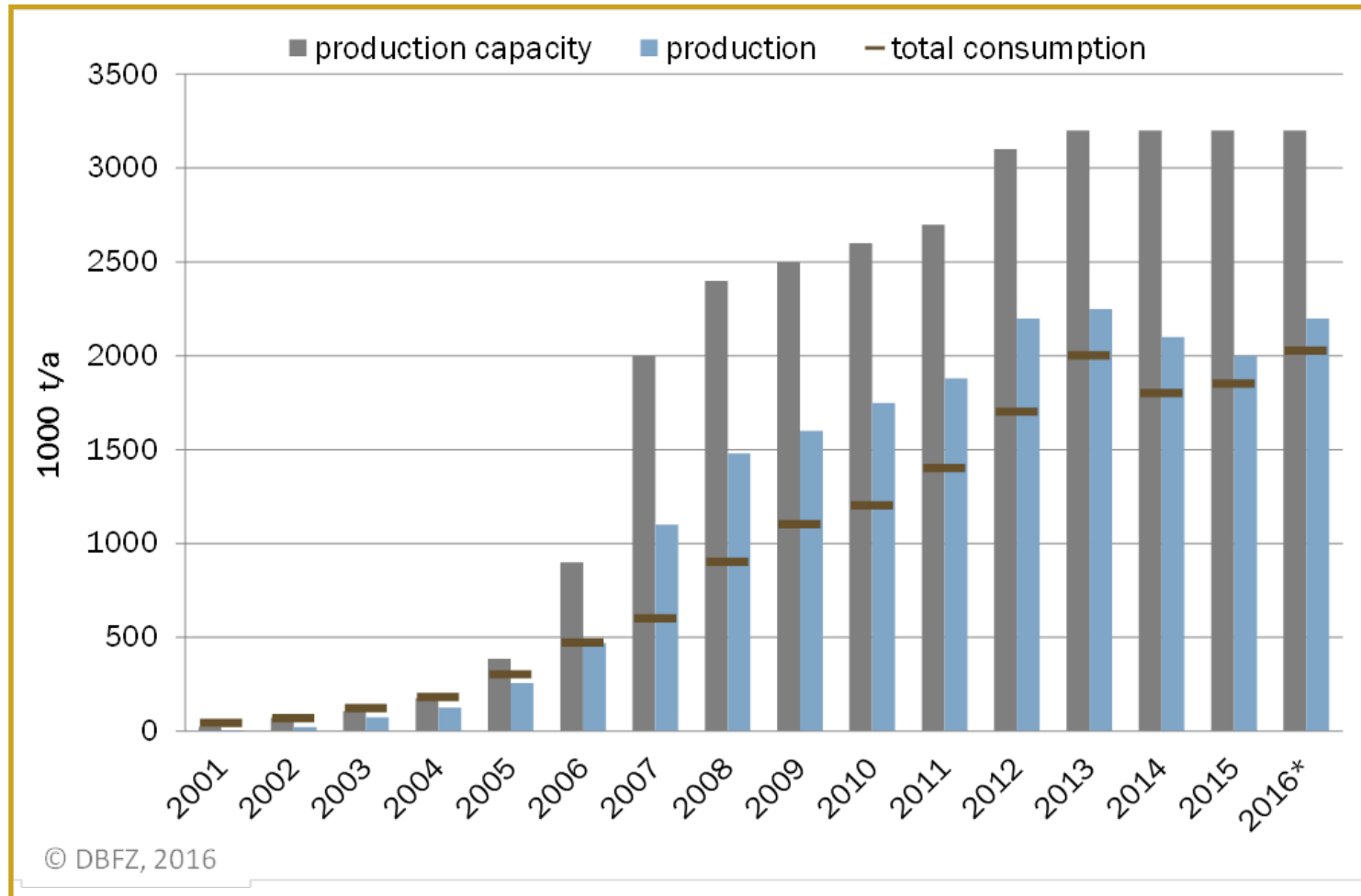


Production capacity, production and feedstock Finland

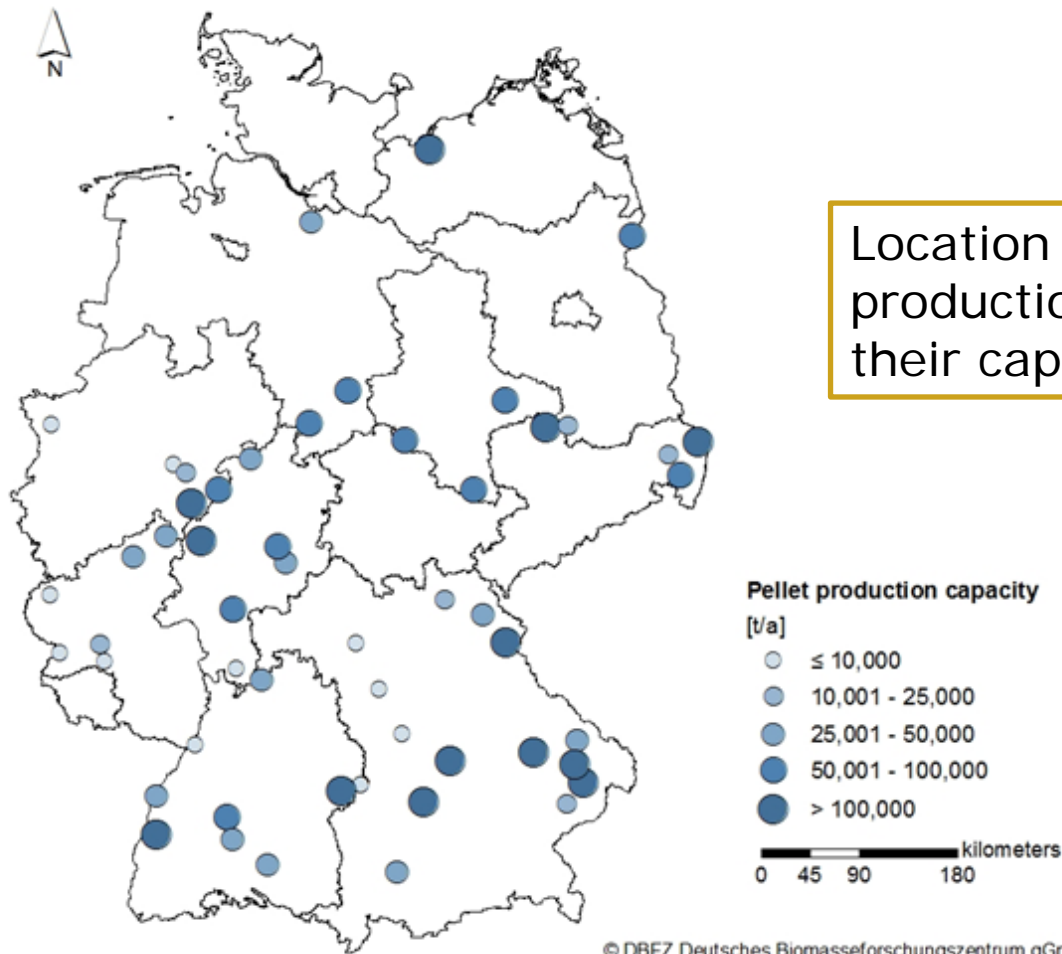


Location of wood pellet production plants and their capacities

Production capacity, production and feedstock Germany



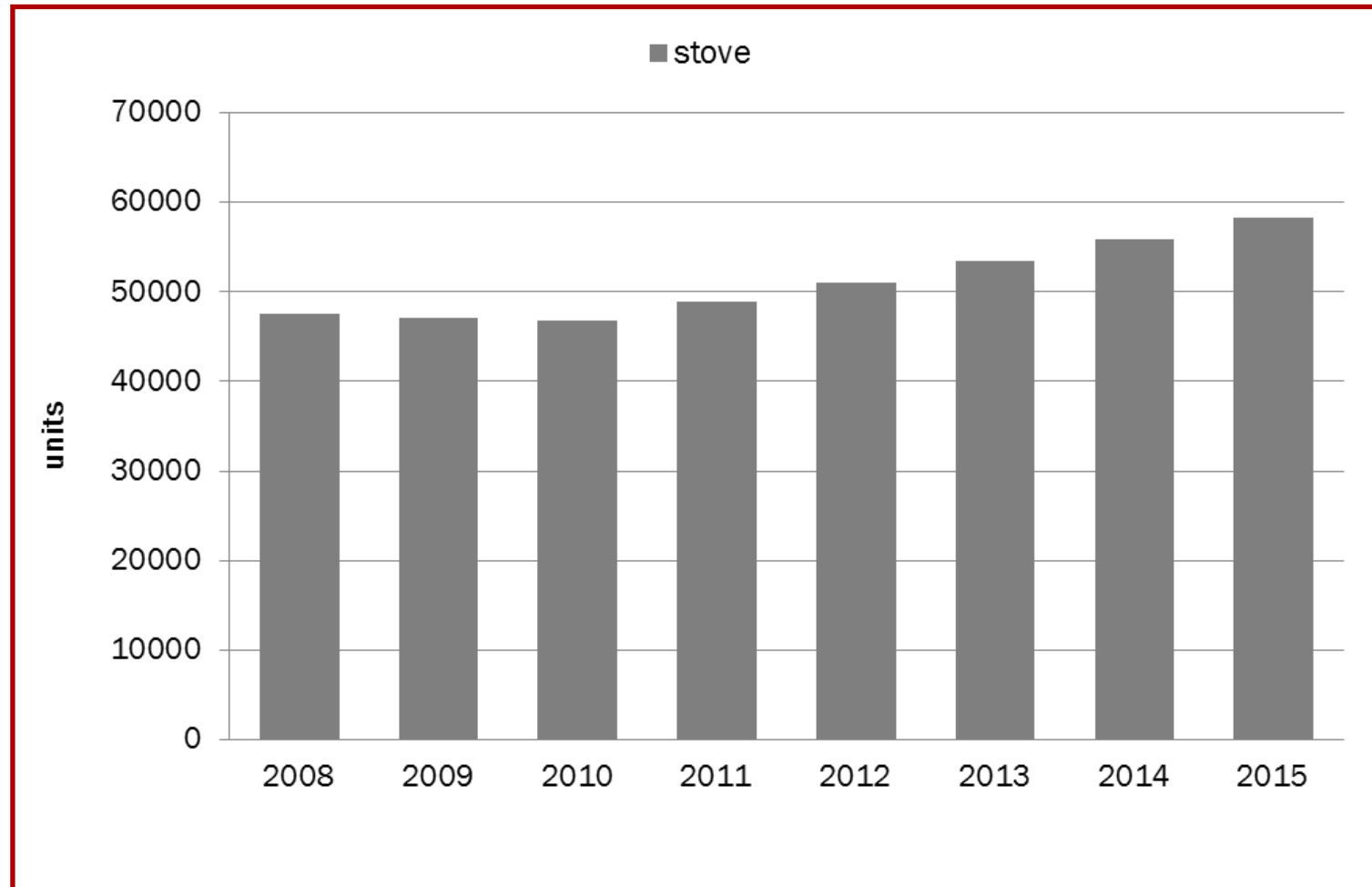
Production capacity, production and feedstock Germany



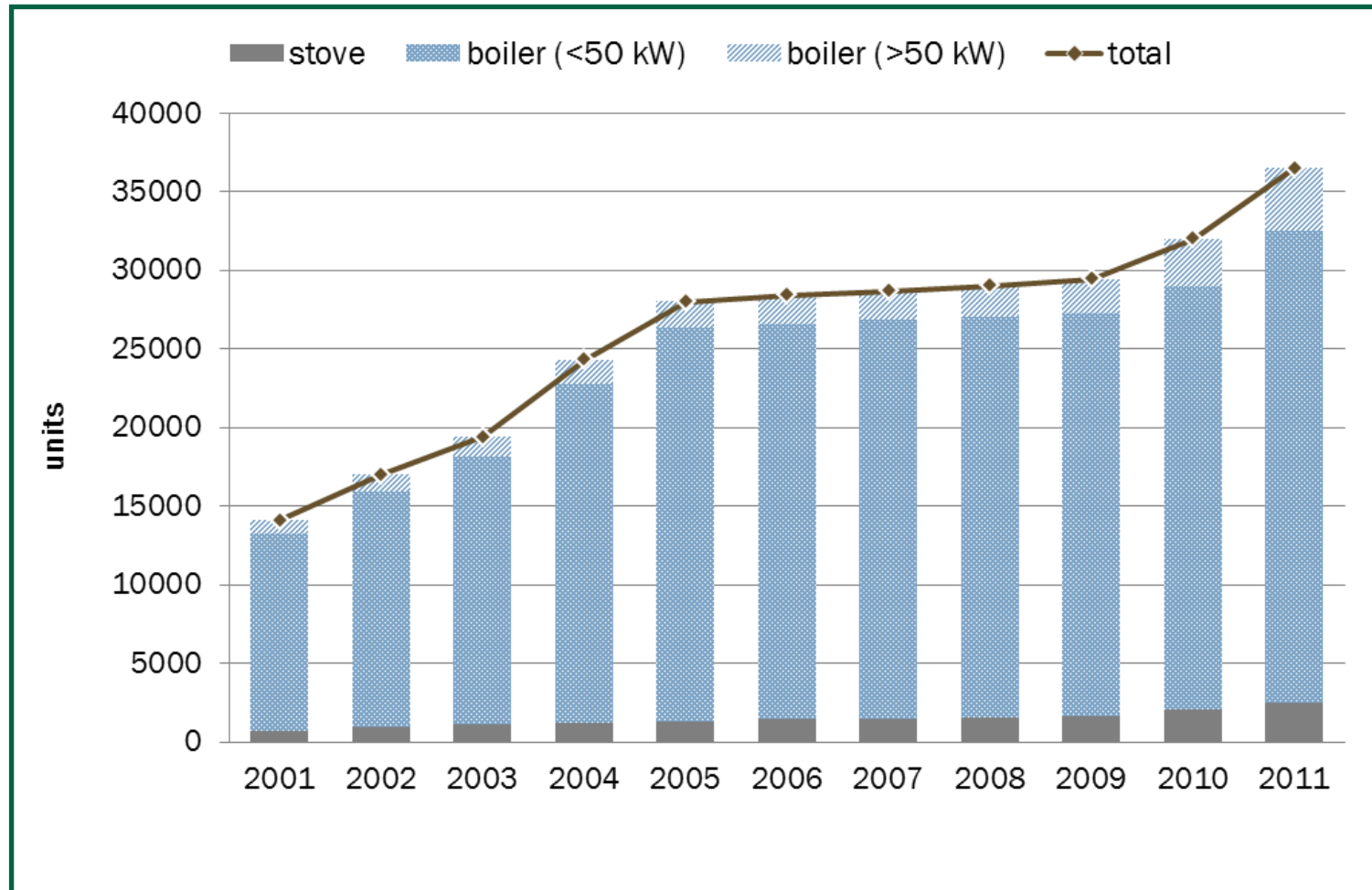
Location of wood pellet production plants and their capacities

Examples for Consumption, Trade and Standardisation

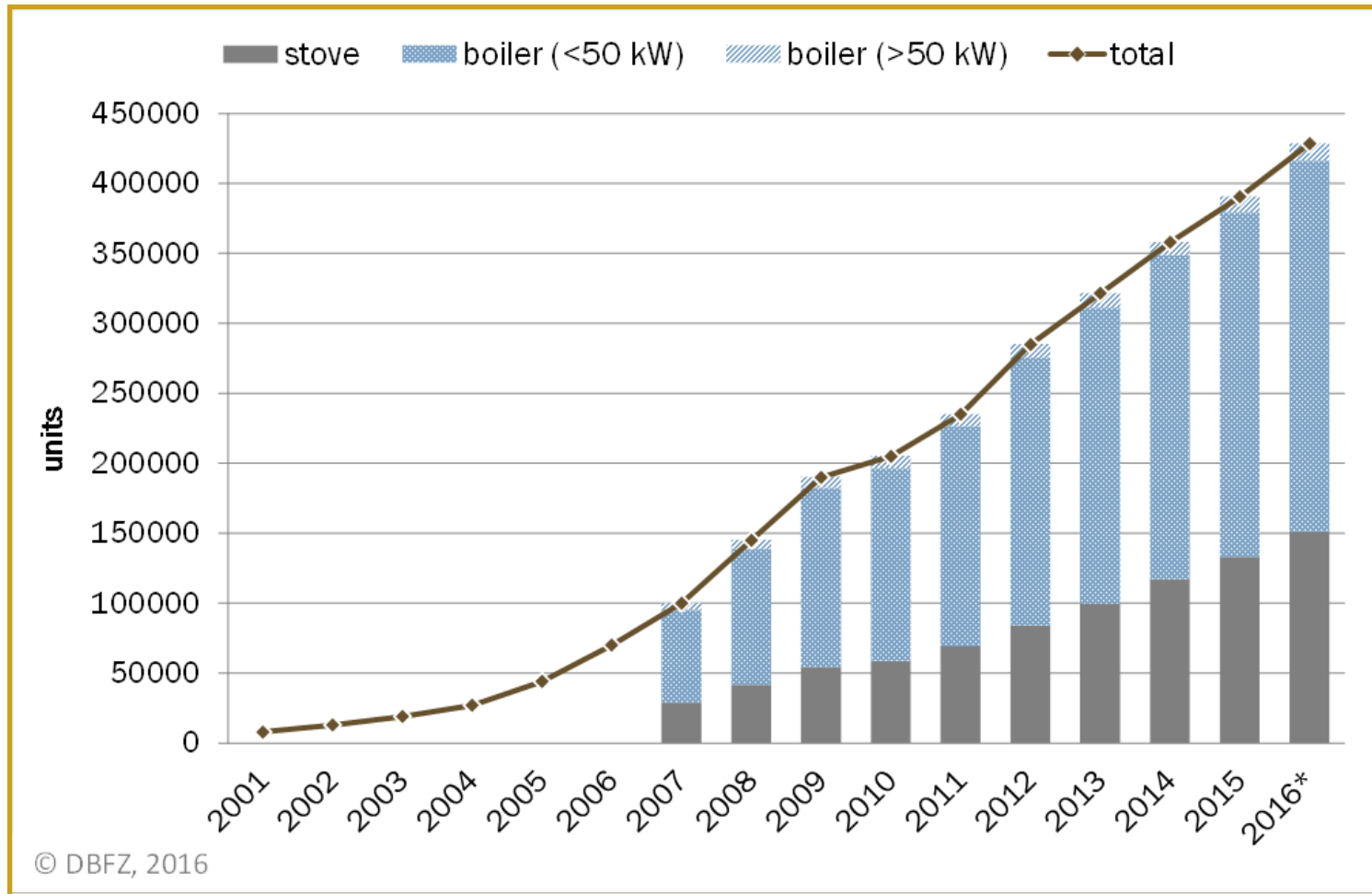
Consumption USA



Consumption Finland

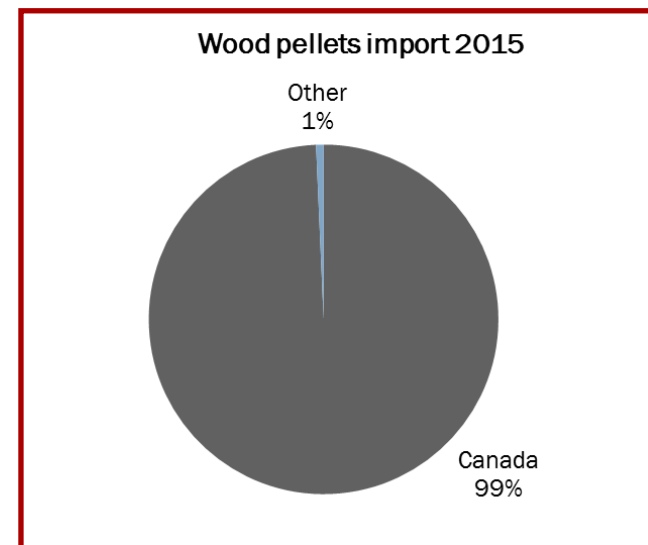
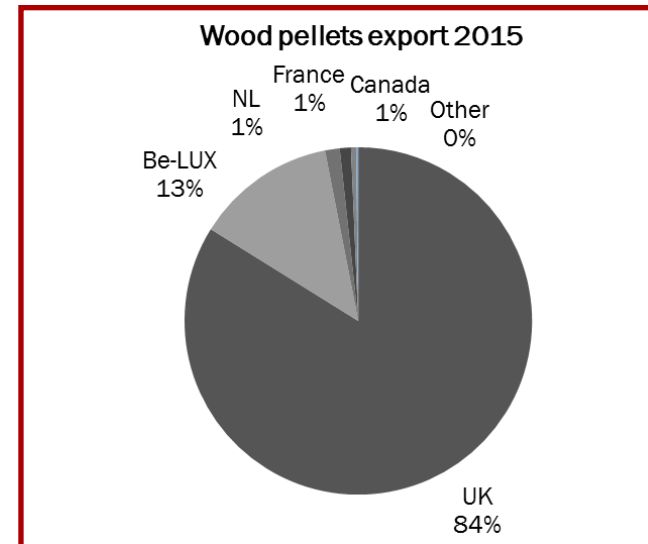
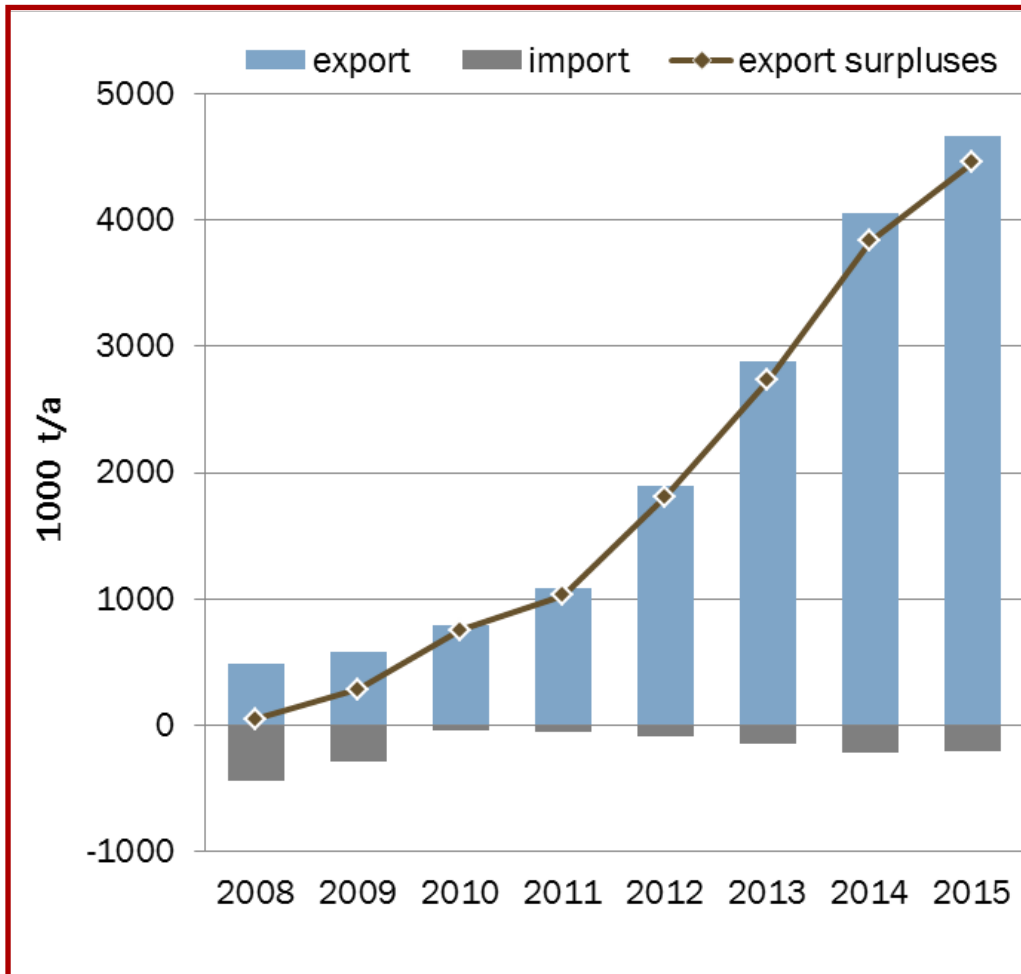


Consumption Germany

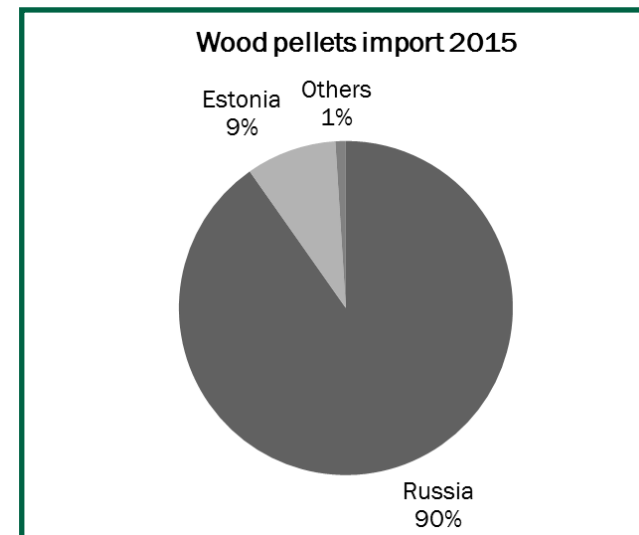
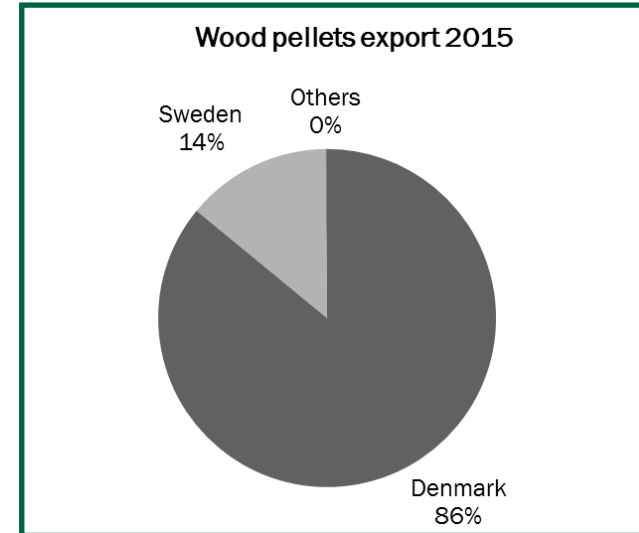
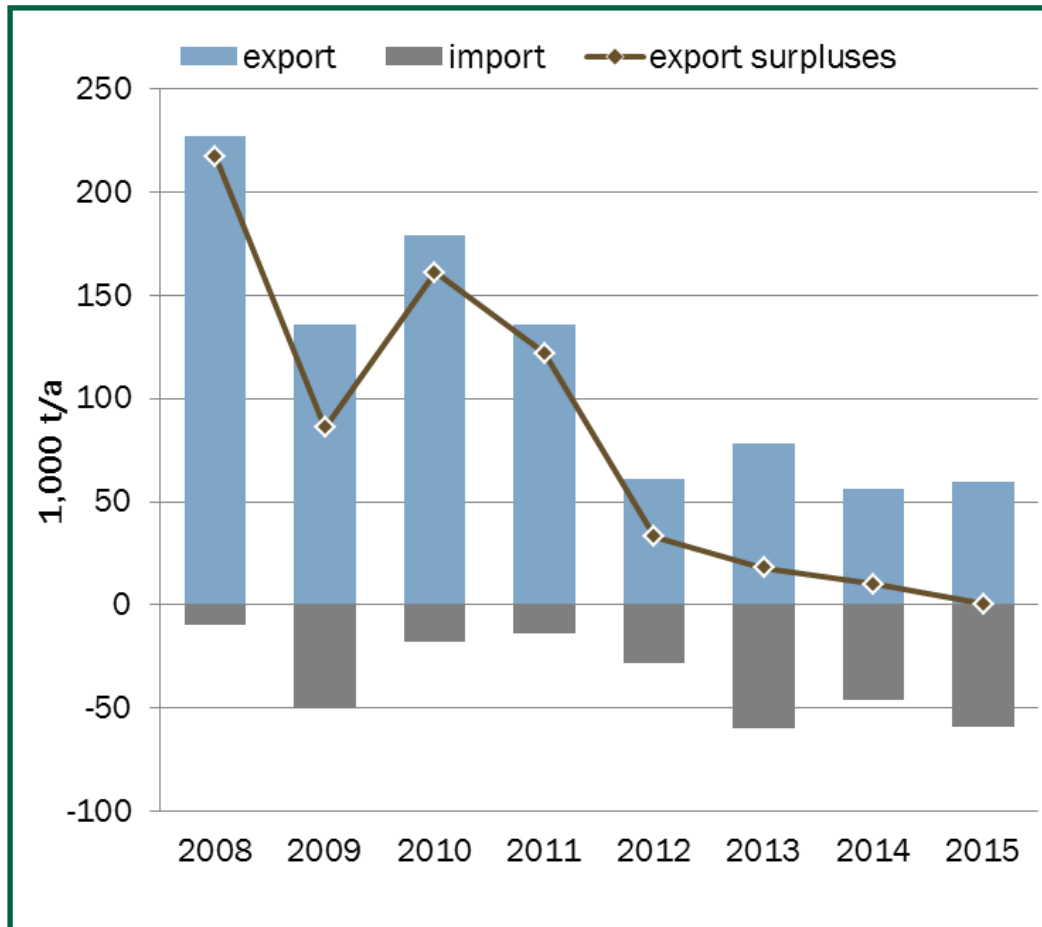


Trade and logistic aspects

USA

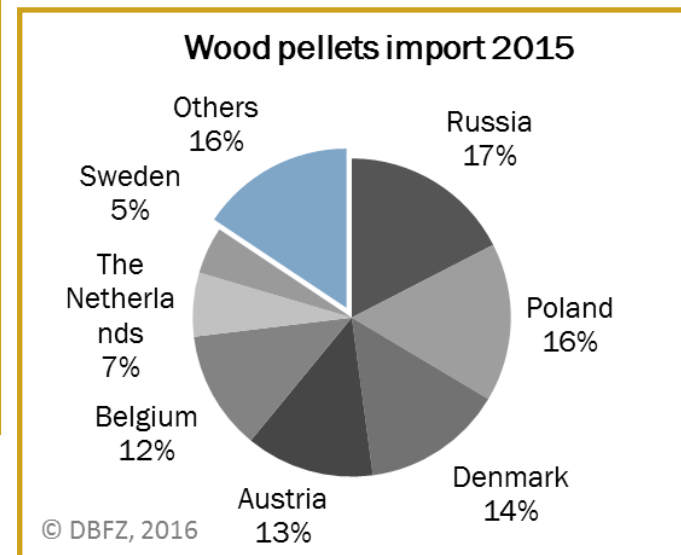
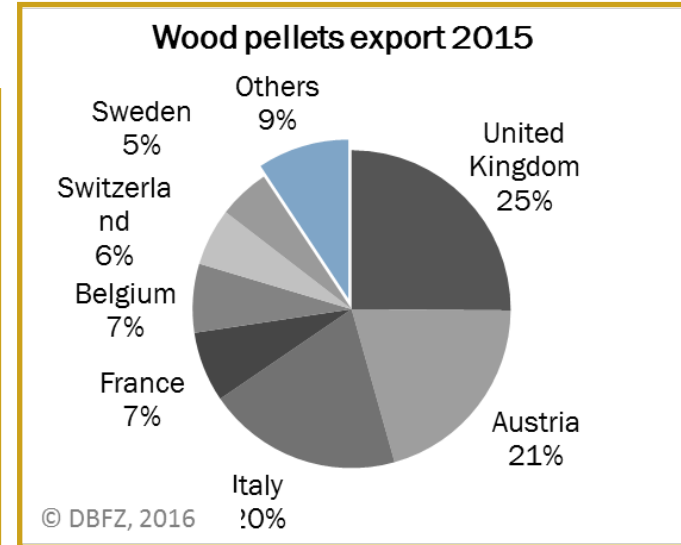
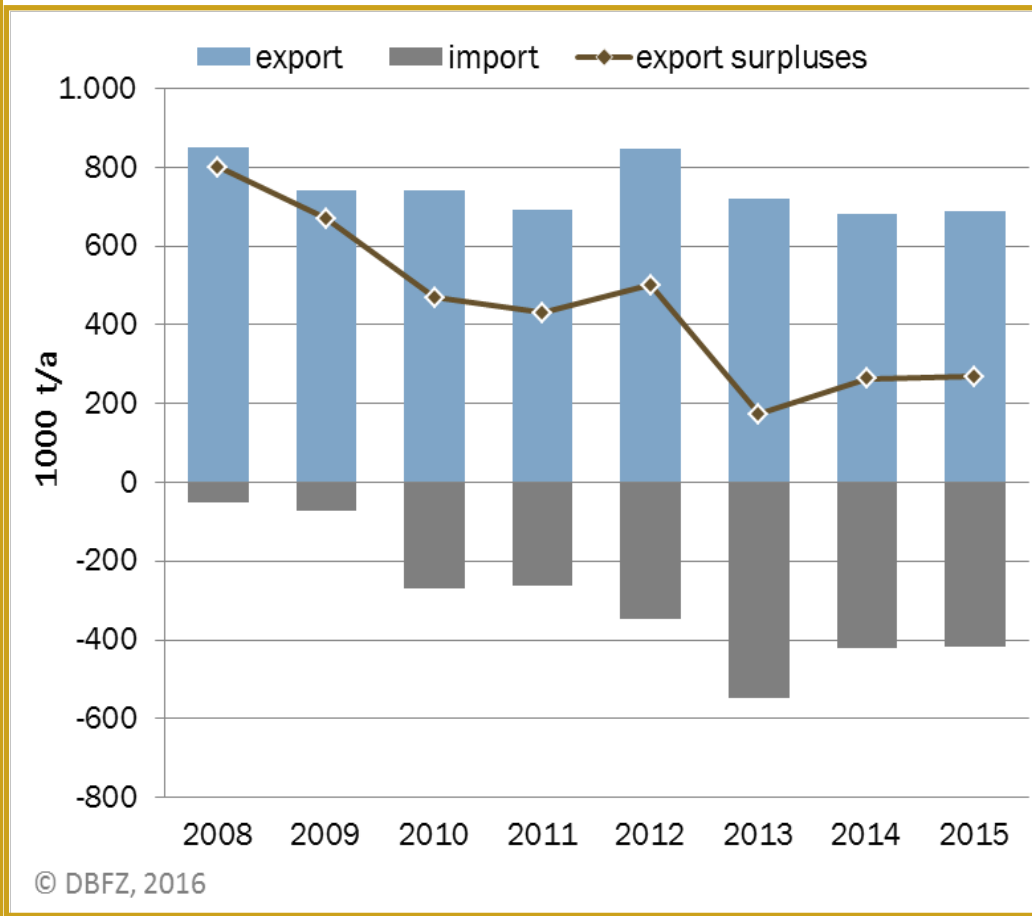


Trade and logistic aspects Finland



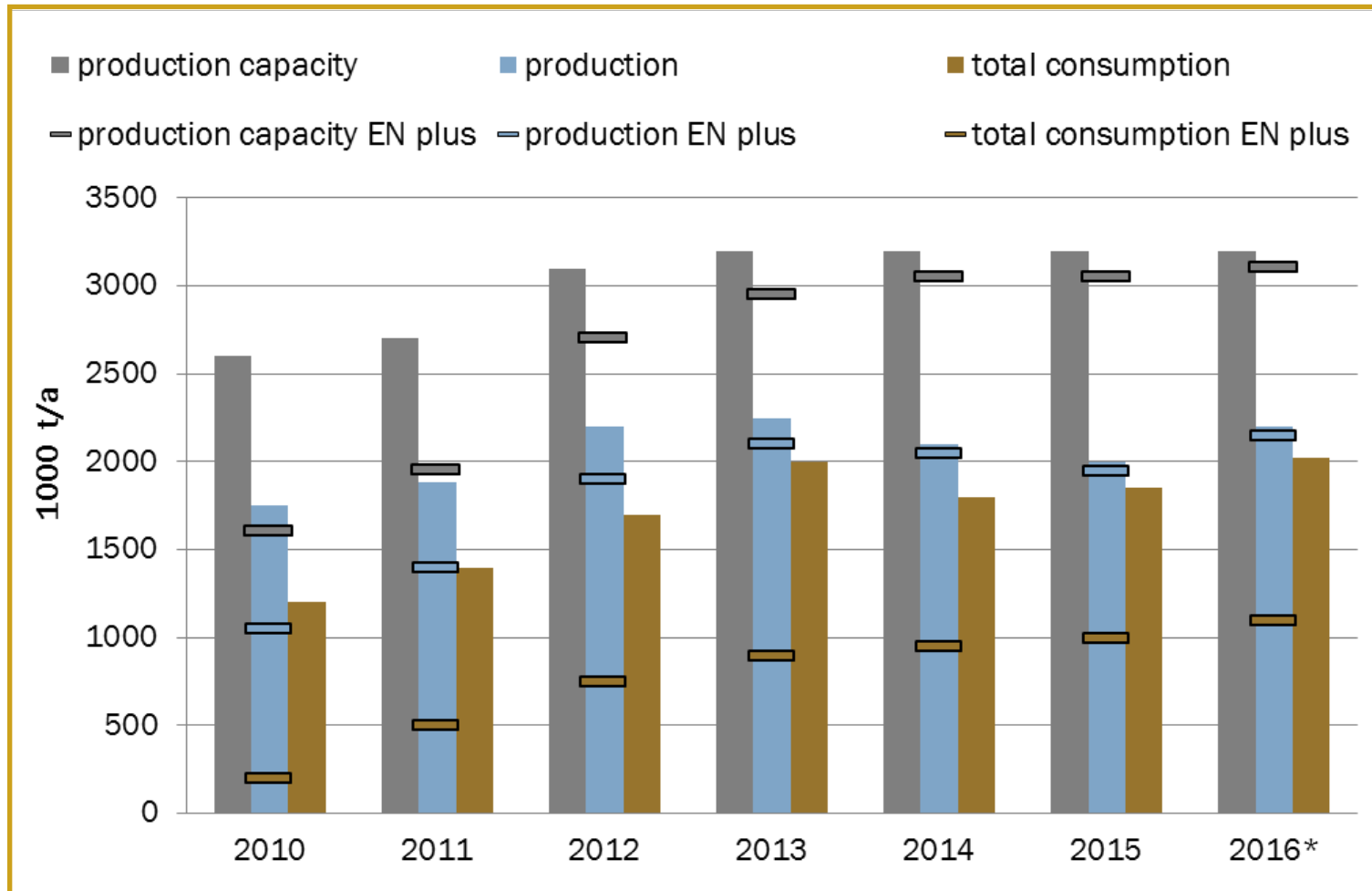
Trade and logistic aspects

Germany

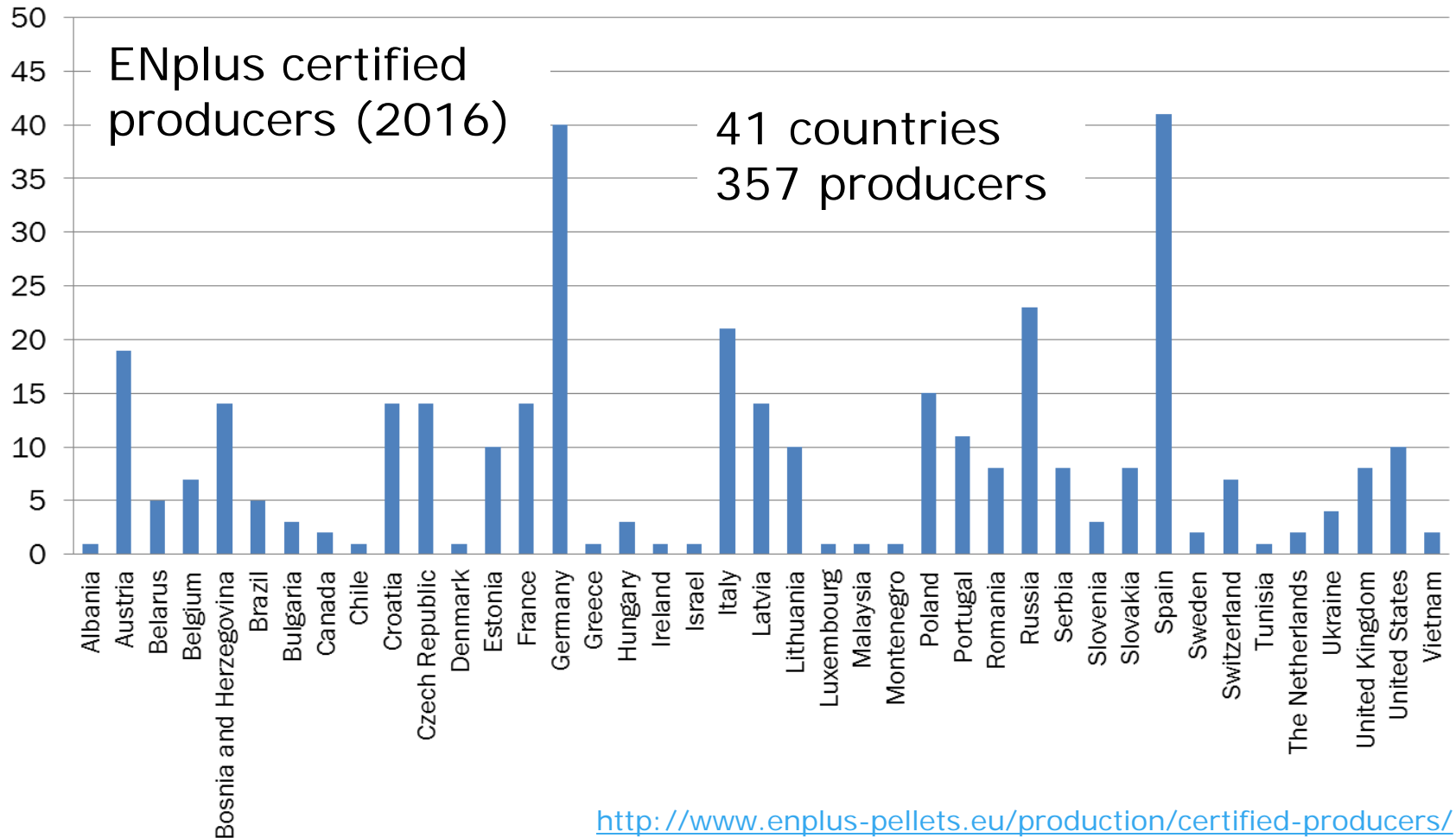


Pellet quality standard

Germany



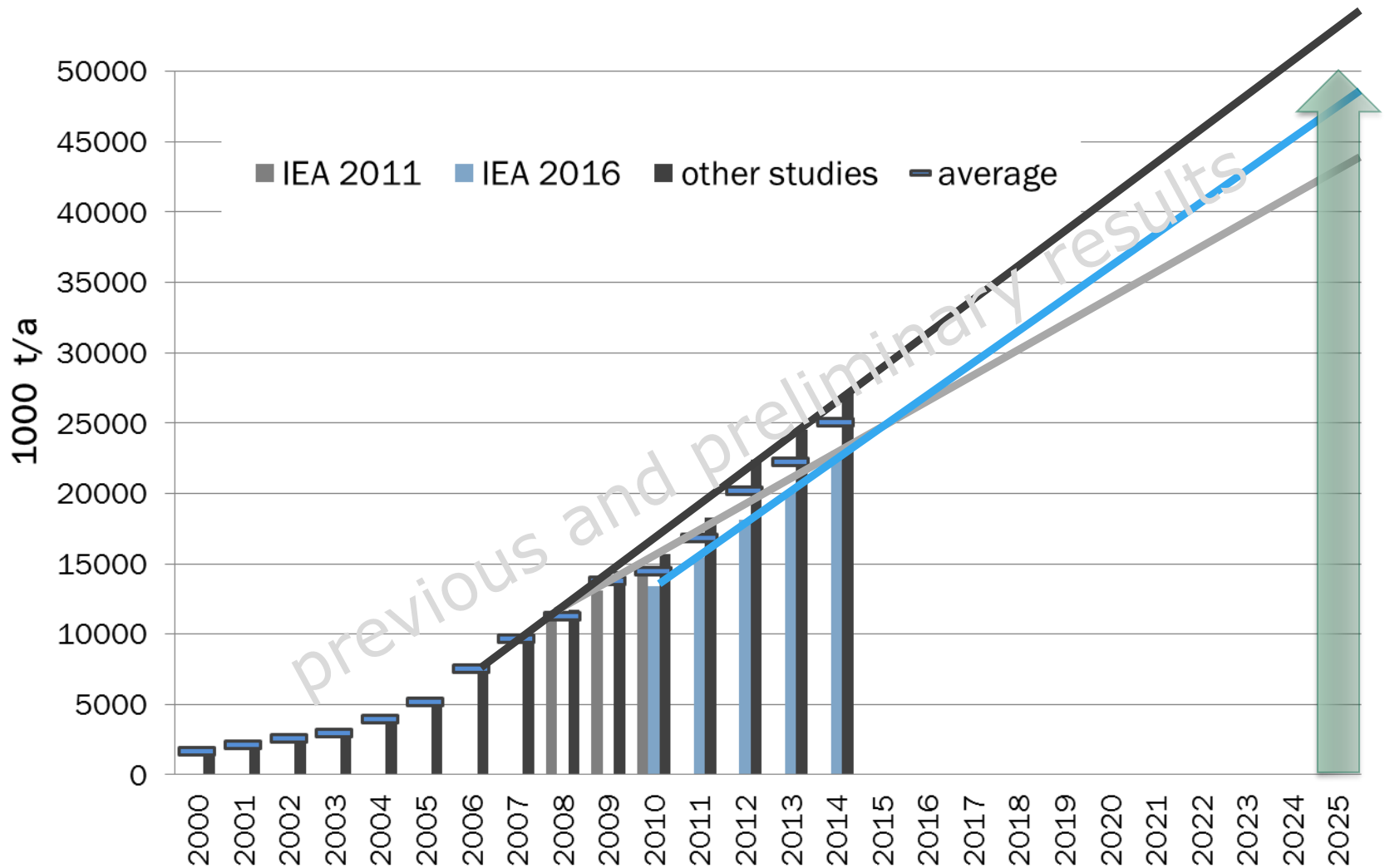
Pellet quality standard - overview



Summary

- Market has increased by factor 10 during the last 15 years – with even higher effects on international trade
- Beside two dominant wood pellet qualities also torrefied pellets are getting traction
- Further market development also depends on the regulatory frame conditions, especially the sustainability requirements for the feedstock
- Final study will be available in spring 2017

Outlook global wood pellet Production until 2025



Thank you very much for your attention

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