

# BIOHEAT

## European update

22<sup>nd</sup> October 2020

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Bioenergy Europe

## About us



**Common voice** of European bioenergy for the past 29 years.



Unites **45 national associations** and **115 companies** from Europe.



**Umbrella organisation** for the European Pellet Council and the International Biomass Torrefaction Council.



Aims at a **sustainable bioenergy market** based on fair business conditions.

## Our activities



We carry **advocacy activities** in key policy areas & organise **dedicated working groups** to support the specific needs of our members.



We conceive and deploy **targeted publications & communication campaigns** to educate about bioenergy.



We **collect data** on the evolution of the **bioenergy market** and **produce tailored analyses** along the year.



We own and promote **international certification schemes** to guarantee high quality standard for fuels.

## Our members



## Companies



## Associations



## Academia & Research Centres





Hosted by:  
**Bioenergy**  
EUROPE

# 18 - 20 November

## Virtual Conference

Be the change. Lead the transition.

Sponsored by:



Be the change. **Lead the transition.**

**18-20 November 2020 | Virtual Conference**

2020 will see the conference showcase its **10<sup>th</sup> edition.**

**#EBF2020** provides a unique opportunity for those who want to be part of the main discussion on the future of the sector. Both industry and policy players gather to provide bioenergy professionals with long-term perspectives on the future of bioenergy.

**#EBF2020 #leadthetransition**

More info? Visit [www.conference.bioenergyeurope.org](http://www.conference.bioenergyeurope.org)



Publication on 23rd of October



BIOENERGY EUROPE  
**STATISTICAL  
REPORT**  
2020



## REPORT **PELLETS**



**BiOenergy**  
EUROPE

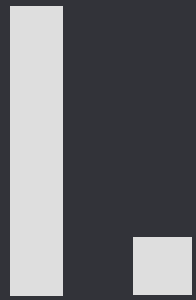
The **future**  
starts **today**.  
Join the debate.

BiOenergy  
EUROPE  
#bepartofbioenergy

**Pellet**  
Working Group

### PELLET WG (29<sup>TH</sup> OCTOBER)

- Industrial market update
- Residential market update
- Answer to air pollution criticism
- Future of densified biomass industry



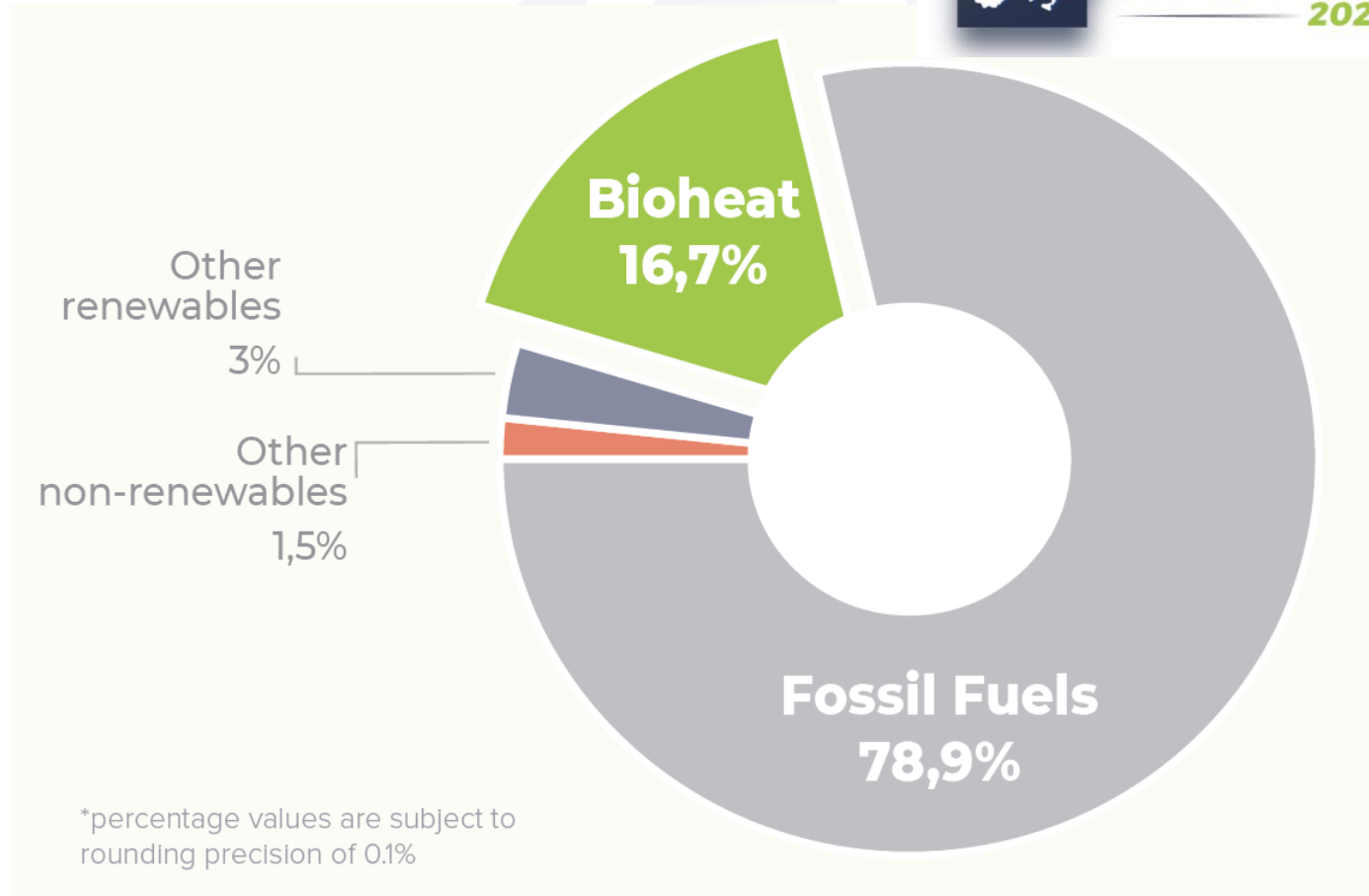
**Bioheat status in Europe**

# BIOHEAT - key contributor to Europe carbon neutrality

## Heating & Cooling in EU

- 50% of EU total energy consumption
- 40% of EU total GHG emission

Contribution of the different energy sources in heating and cooling in EU28 in 2018\* (in %)






**Green Deal is  
Europe's Man on  
the Moon Moment**

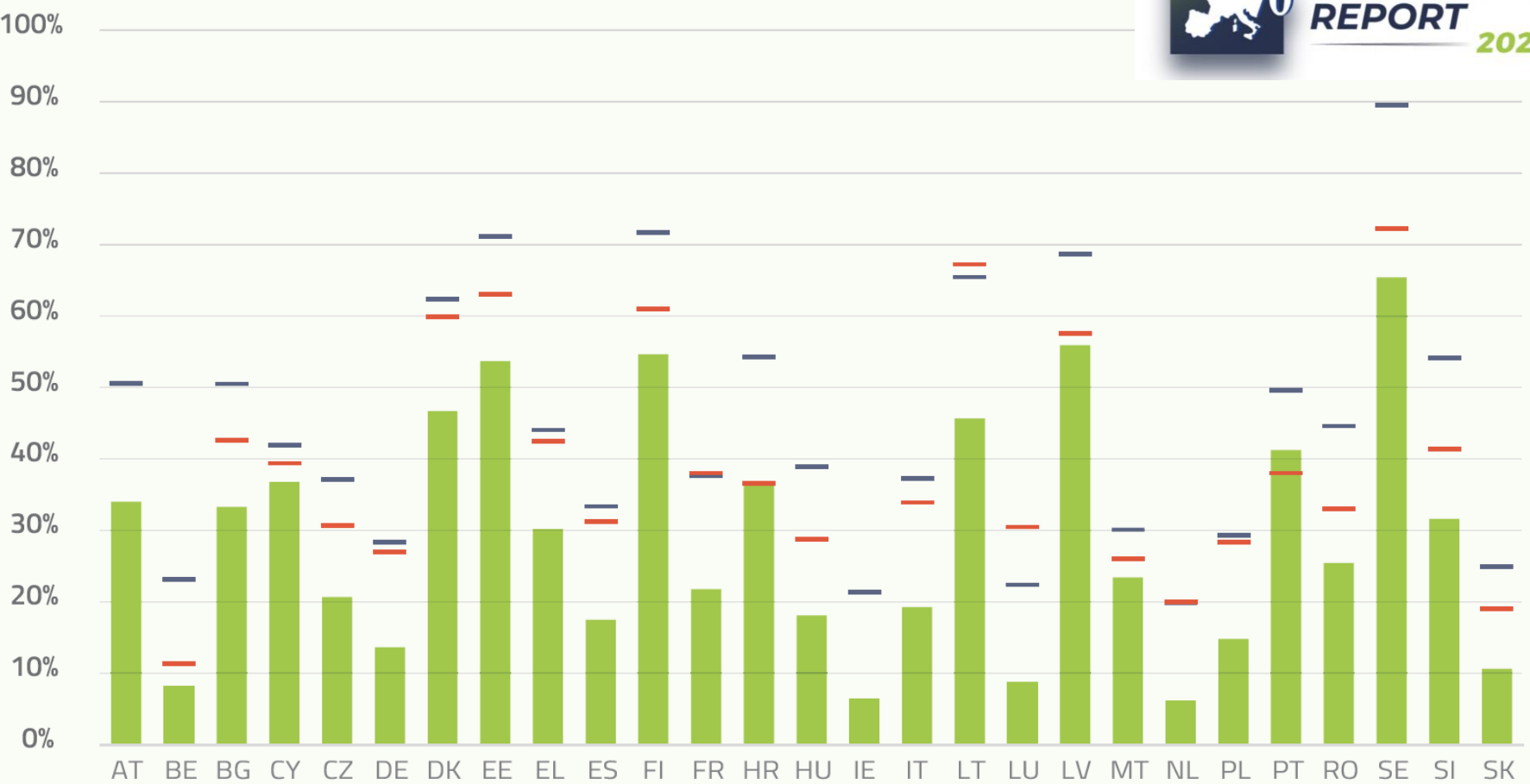


# BIOHEAT - key contributor to Europe carbon neutrality



Comparison of 2030 objectives for renewables energy in the H&C sector (NECPs) vs +1.3pp/year projections (in %)  
(Sources: SHARES 2018, NECPs)

-  % RES - HC in 2018
-  %RES - H&C in 2030 (+1,3pp/year)
-  %RES - H&C in 2030 (NECPs objectives)





# BIOHEAT - key contributor to Europe carbon neutrality

## RECOMMENDATIONS

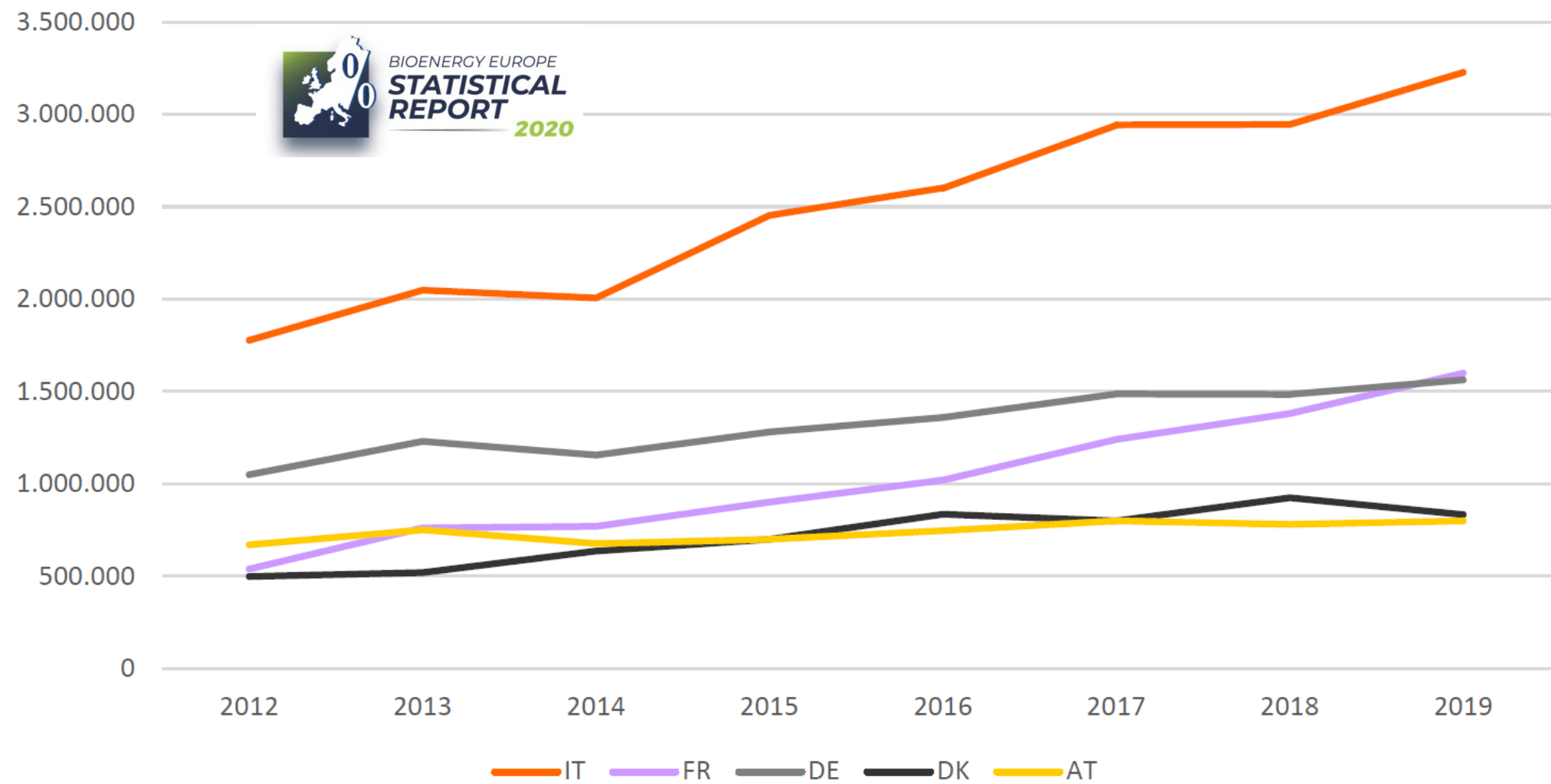
- 1. Decarbonisation of the H&C sector should be a priority for EU!** Bioheat represents a mature and effective solution for decarbonising the buildings and industrial sectors. A possible review of the Renewable Energy Directive should include higher ambitions for the heating and cooling sectors by 2030.
- 2. Fossil fuel subsidies should finally become history.** Member States should be supported in phasing out fossil fuels for heating (i.e. by a holistic carbon price covering also for non-ETS sectors).
- 3. Biomass district heating should be promoted, as well as a fuel switch in existing district heating.** Biomass district heating provide one of the best examples of sector integration.
- 4. The Renovation Wave should support and promote the replacement and modernisation of old and inefficient residential installations with modern, high-quality biomass appliances.** Not only does the switch increase energy efficiency, but it also improves air quality.



**Pellet for heat in Europe**

# Pellets for heat in Europe

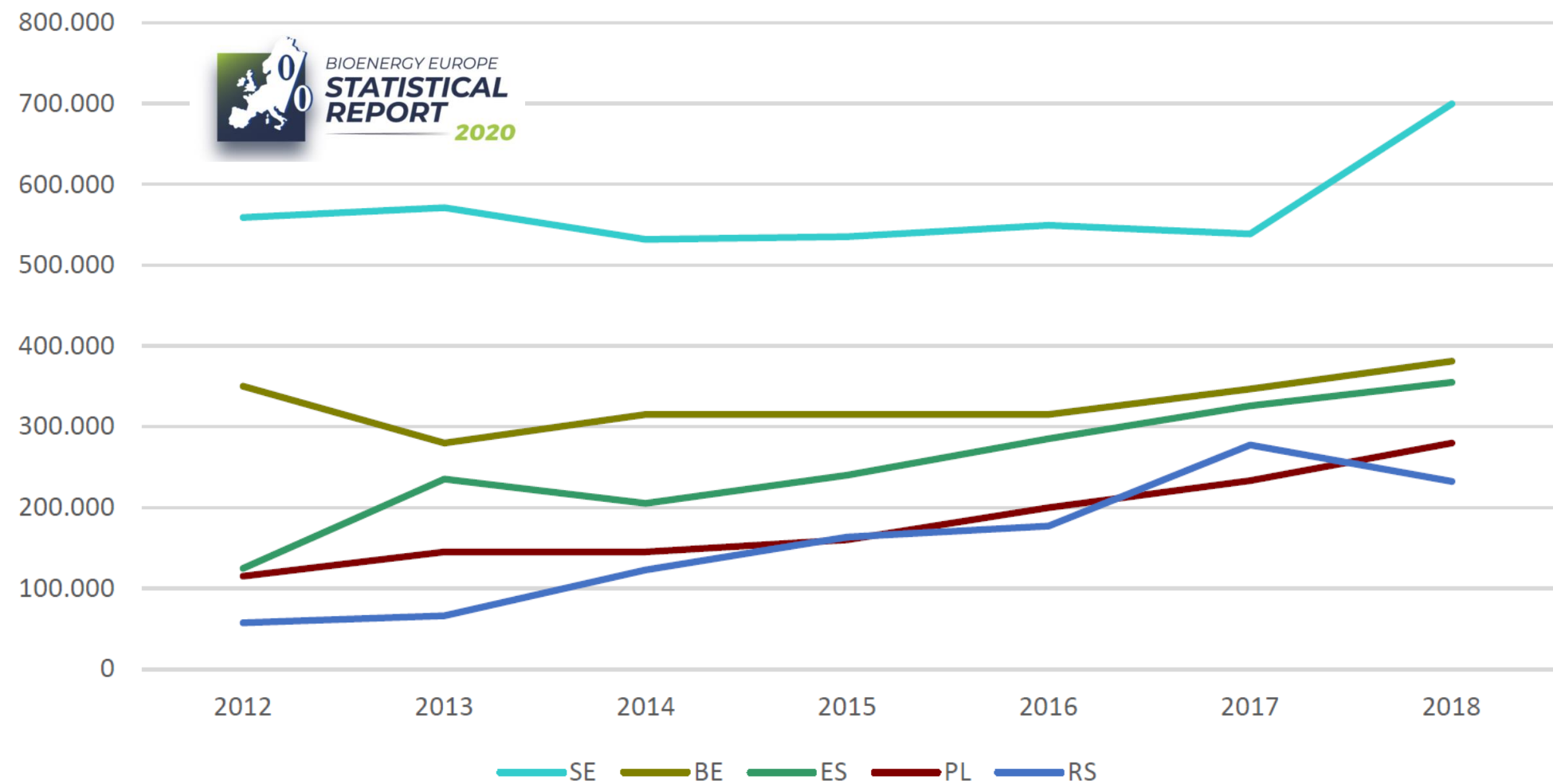
EVOLUTION OF WOOD PELLET CONSUMPTION FOR RESIDENTIAL HEATING IN EUROPE IN TOP 5 COUNTRIES OF EU (IN TONNES)



Source: EPC survey 2020

# Pellets for heat in Europe

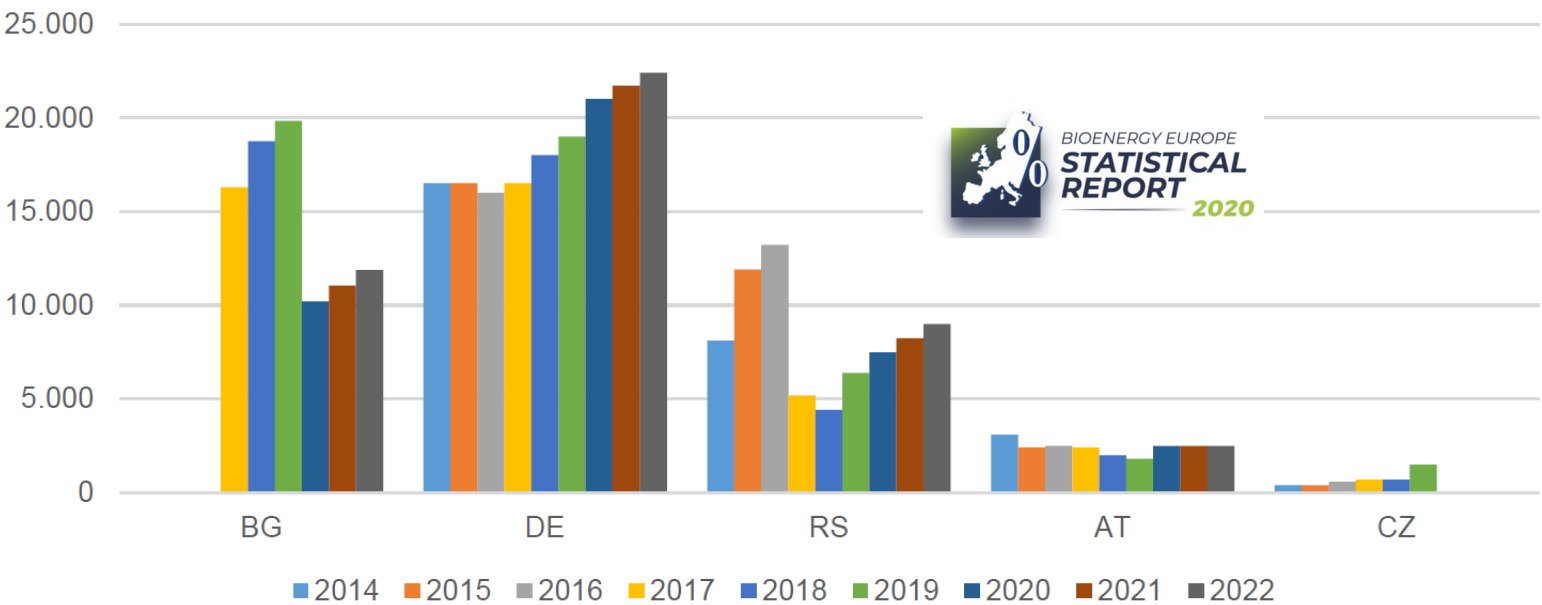
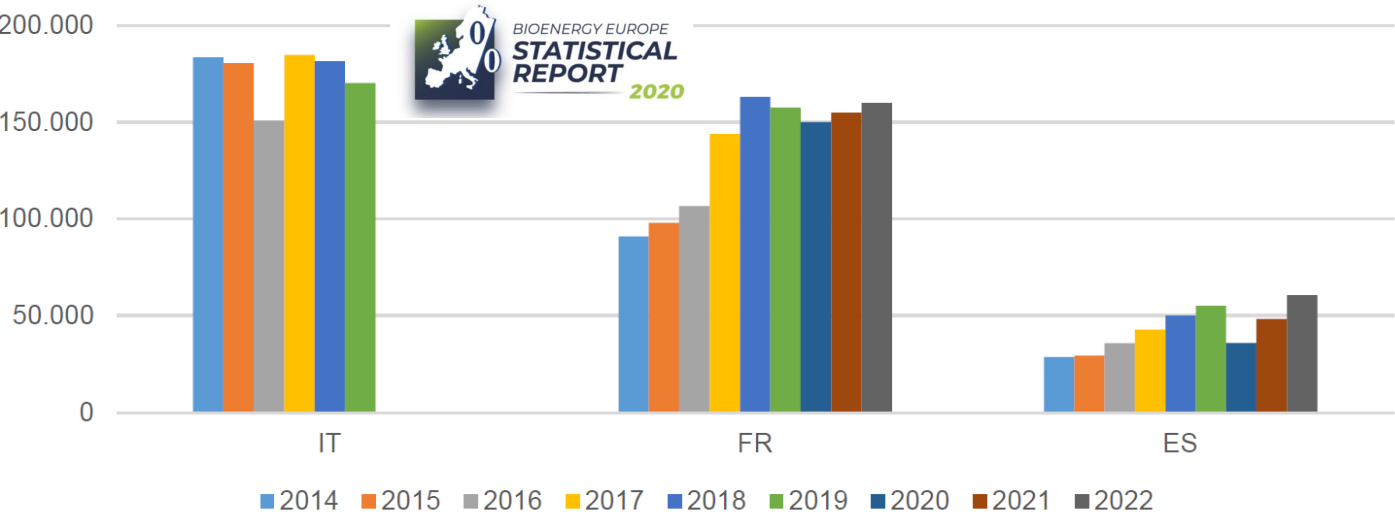
EVOLUTION OF WOOD PELLET CONSUMPTION FOR RESIDENTIAL HEATING IN EUROPE IN TOP 6-10 COUNTRIES OF EU (IN TONNES)



Source: EPC survey 2020

# Pellets for heat in Europe

EVOLUTION OF ANNUAL SALES OF PELLET STOVES IN SOME EUROPEAN COUNTRIES (N° OF UNITS)

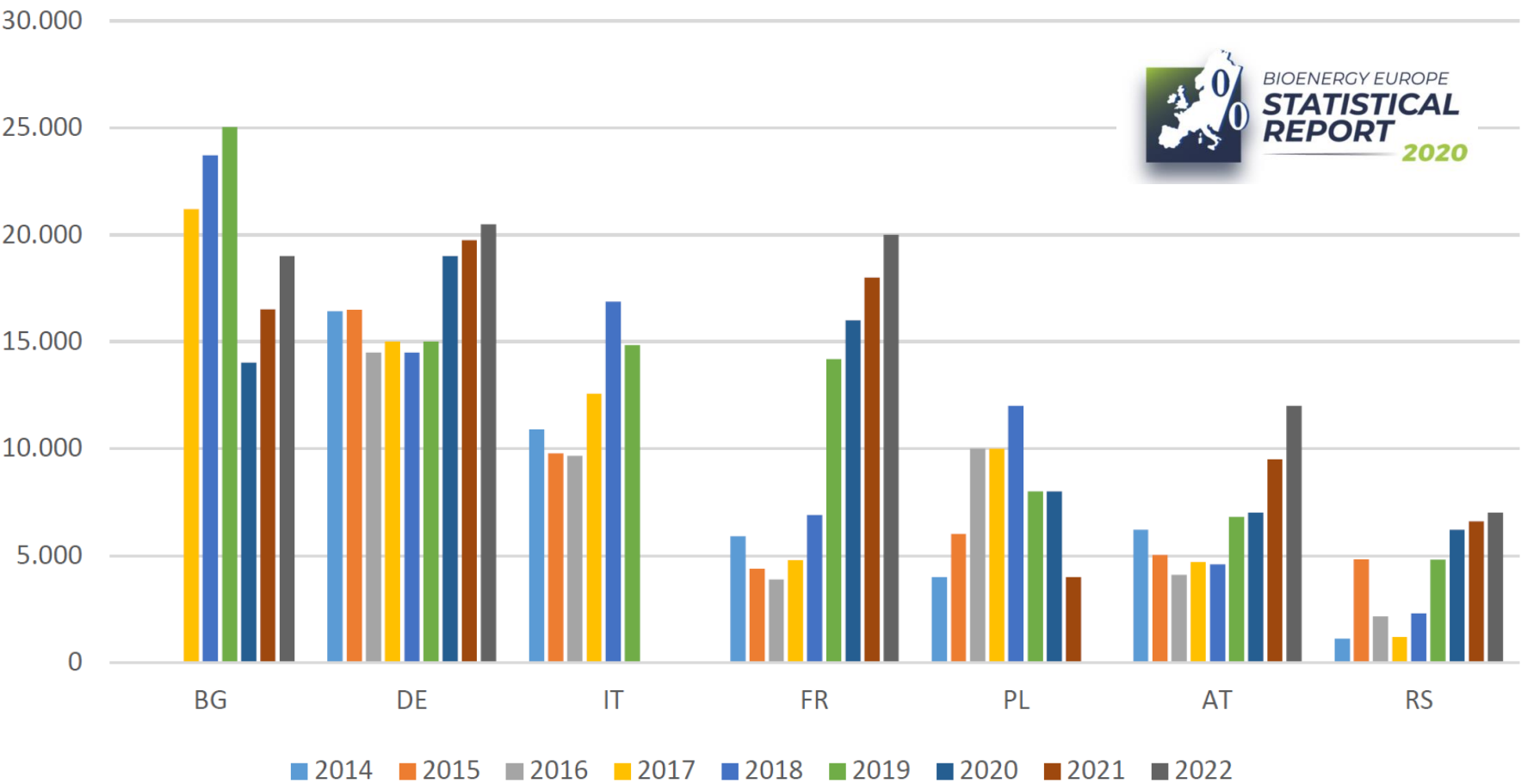


Source: EPC survey 2020



# Pellets for heat in Europe

EVOLUTION OF ANNUAL SALES OF RESIDENTIAL PELLET BOILERS (N° OF UNITS) IN TOP-7 EUROPEAN COUNTRIES



# Pellets for heat in Europe



Average percentage of household with pellet stoves in 2019 in some European countries (%)

IT	7,30%
BG	4,31%
FR	3,01%
ES	1,43%
AT	1,30%
SE	0,62%
DE	0,43%
EL	0,39%
HR	0,24%
LV	0,24%
CZ	0,10%
FI	0,09%
SK	0,03%



Average percentage of household with pellet boilers in 2019 in some European countries (%)

BG	5,11%
AT	3,28%
SE	1,46%
LV	1,33%
FI	0,96%
DE	0,67%
PL	0,67%
CZ	0,62%
IT	0,52%
SK	0,25%
FR	0,22%
EL	0,15%
ES	0,10%
HR	0,06%
UK	0,04%

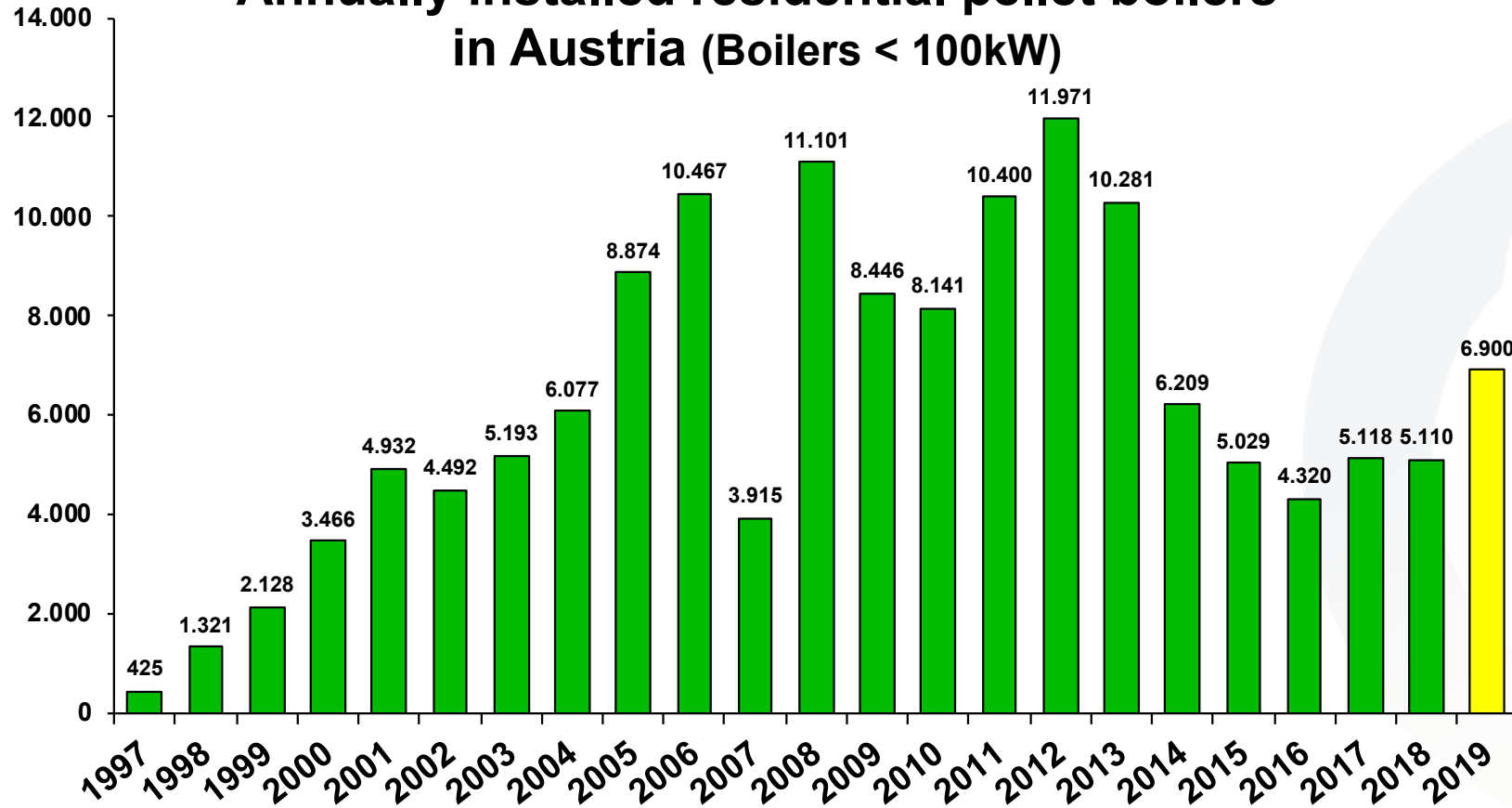


Nice stories in pellet heating

# Nice stories in pellet heating

## AUSTRIA

**Annually installed residential pellet boilers  
in Austria (Boilers < 100kW)**



Source: DI Herbert Haneder, Landwirtschaftskammer NÖ; estimation 2019 and graph proPellets; Jan 2020

- Commitment to carbon neutrality 2040
- 2020: no oil heating systems in new buildings
- 2021: no replacement of existing oilboilers by new oilboilers
- 2025: oil heating systems older than 25 years must be replaced, no new gas heating systems

# Nice stories in pellet heating

## AUSTRIA

### Storage obligation for pellets: proposed by proPellets Austria

- Producers and importers are obliged to store 10% of annual deliveries of last year from Dec. 1-15
- 5% by end of January
- Minister of energy should be entitled to change level of obligation if needed
- Idea: supply security is fundamental for future growth
- Costs should be evenly distributed

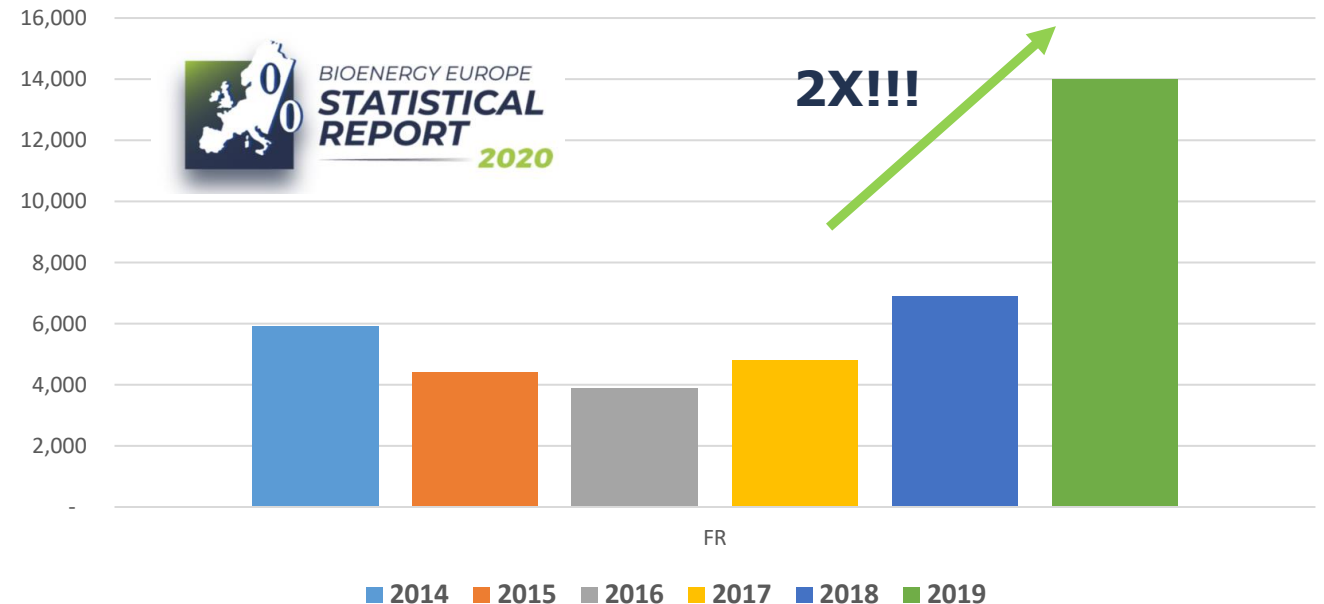


# Nice stories in pellet heating FRANCE

## Perfect market conditions

- Carbon tax (paused)
- Tax reduction + subsidy for heating appliance installation
- Heating oil boilers phasing out plan  
1.000.000 boilers to be replaced in 5 y

## Annual sales of residential pellet boilers in FRANCE

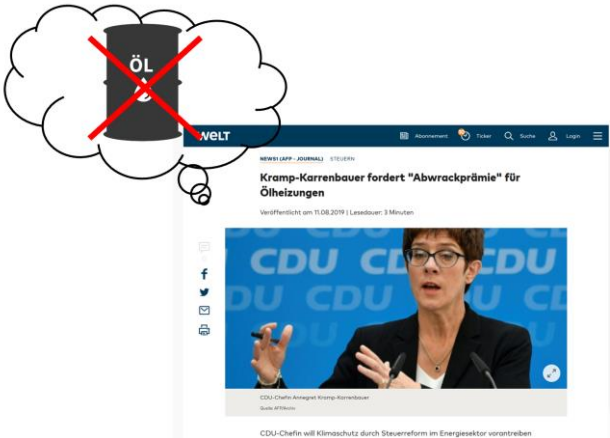


# Nice stories in pellet heating

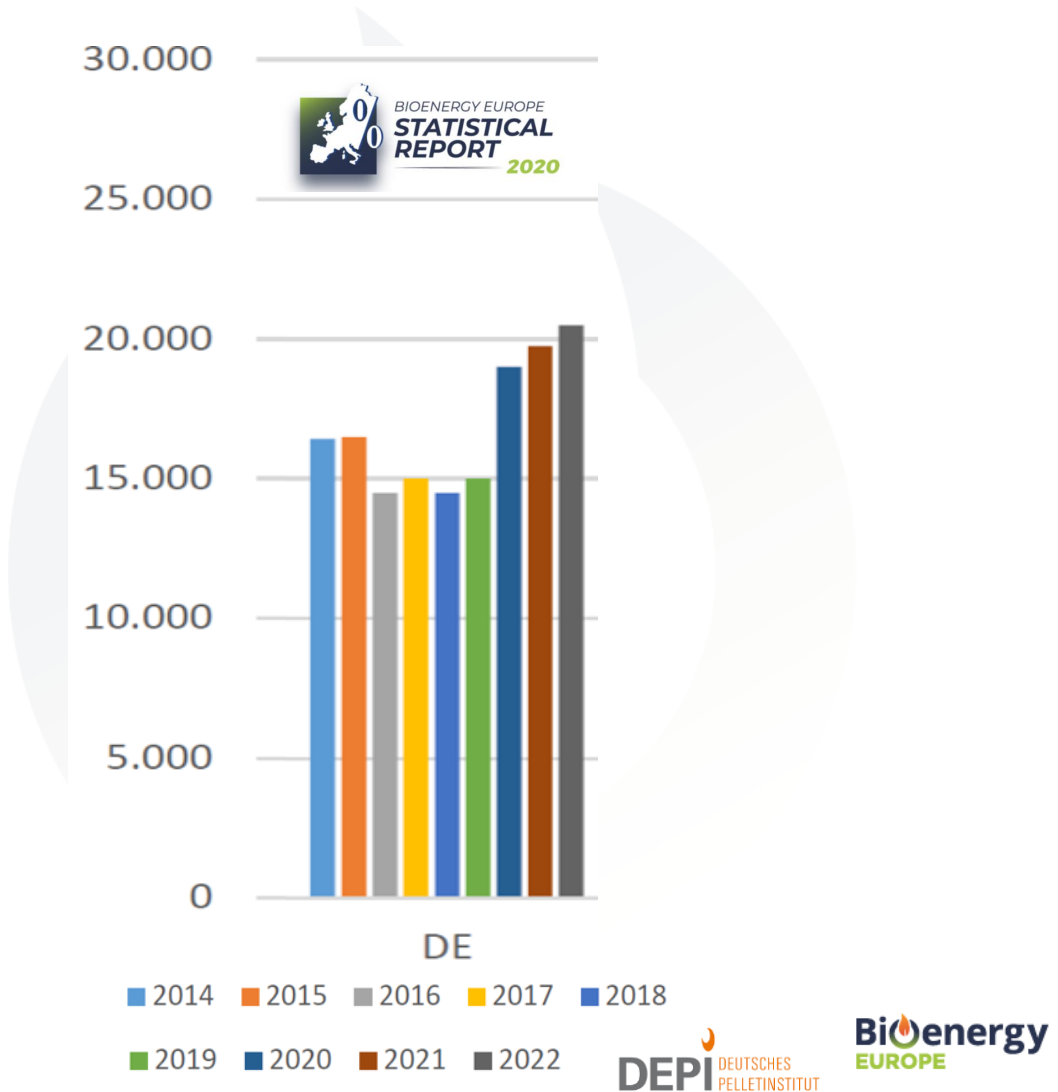
## GERMANY

Rates of support for wood furnaces (up to 5 kW)			
Type of system	Financial incentive		Minimum buffer tank
Pellet stove with water pocket	35 % basic support	45 % bonus for replacement of an oil heating system	-
Pellet boiler			-
Combi boiler for pellets/firewood or wood chips/firewood			55 l/kW*
Wood-fired boilers			30 l/kW*
Wood chips boiler			

\* The buffer storage must be available and proven, but not reinstalled.



## Annual sales of residential pellet boilers in GERMANY



# IV.

## Challenges of residential heating

# Challenge of residential heating



# AIR EMISSION

## Demonstrate performance of biomass heating appliances

### Context

Great concerns over air emissions.

### Pro-active reaction from industry

Demonstrate performances/emissions of domestic heating appliances.



### International certification scheme



Source: <https://www.contura.eu/english/news/blog-and-articles/ecodesign-ready-stoves-reduce-emissions-by-90/>



# AIR EMISSION

## Communicate on performance of biomass heating appliances



Bioheat in Europe  
**a necessity**

[Read More](#)

<https://www.switch4air.eu/>

# AIR EMISSION

## Communicate on performance of biomass heating appliances



### KEY MESSAGES

+

+

+

1



Replace old and inefficient appliances

+

+

+

2



Use high quality & certified fuel

+

+

+

3



Hire certified installers

+

+

+

4



Inform yourself about the best available solutions

# Thank you

Gilles Gauthier  
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