

European wood pellets

Fueling Europe's energy transition

November 2023



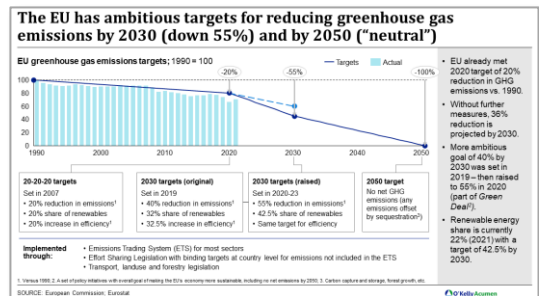
European wood pellet markets are experiencing renewed growth with gas shortages, rising carbon prices, and EU energy policy. This study looks ahead to 2030 and considers how these market forces will drive tighter competition for raw materials and increased pellet imports. It also considers challenges and opportunities for players throughout the value chain, from developing new feedstocks and adapting manufacturing processes, to global pellet supply strategies.

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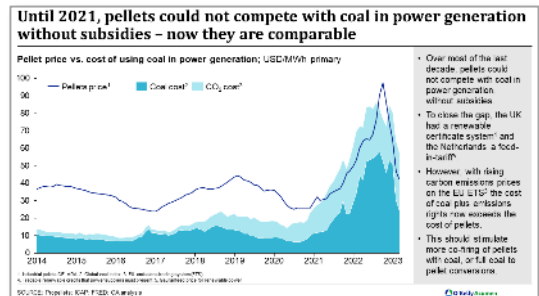
1. **Context: The importance of European pellets**
 - Global pellet demand and imports by region
 - Leading pellet producers globally by region
 - Recent price trends in pellets and raw materials
2. **Forces driving pellet demand growth**
 - EU renewable energy targets and role of biomass
 - Comparative advantages of pellets in key applications
 - Pellet cost position in residential heating and power
3. **Demand outlook**
 - European pellet demand 2012-22 by segment, region
 - Analysis of key demand drivers by market segment
 - Demand forecasts to 2030 by market segment
4. **Price dynamics**
 - European vs. global pellet prices
 - European pellet price trends by grade and region
 - Impact of natural gas prices
5. **Supply potential and role of imports**
 - Local vs. import supply by market segment and region
 - Pellet production costs by country (Europe and imports)
 - Outlook for European vs. import supply to 2030
6. **Raw materials and sourcing**
 - European pellet raw material mix, by region, over time
 - Feedstock prices and competition with pulp and panels
 - Costs and supply potential by raw material
7. **Future scenarios and implications**
 - 2030 market scenarios including key market drivers
 - Implications for players throughout the supply chain

Example exhibits

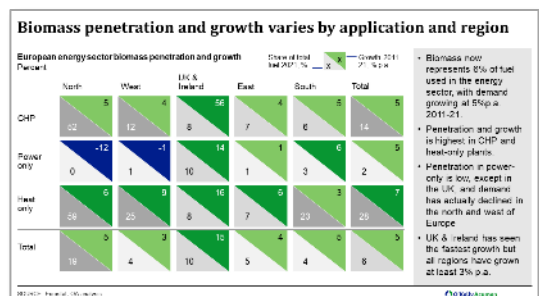
EU carbon emissions and renewable energy targets to 2030 and 2050



Pellets vs. coal plus carbon costs in power generation, 2014-23



Biomass penetration and demand growth by region and energy plant type



Questions the report helps answer

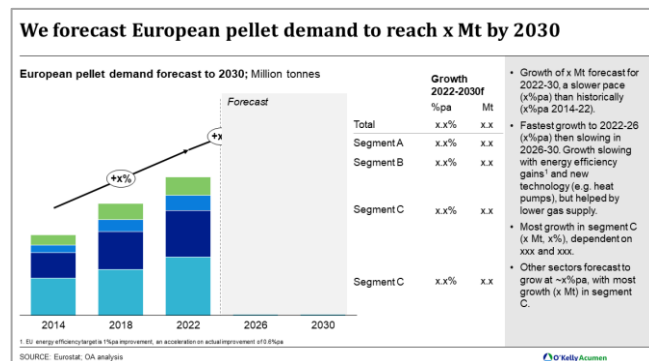
- How will European wood pellet demand grow in 2023-2030?
- How will demand develop by market segment, and where will supply come from?
- What drives wood pellet prices?
- How much wood pellets will Europe need to import from other world regions?
- What is the raw material mix for European pellet production? How could that evolve?
- What is the cost and availability of alternative raw materials for pellets?
- How is the European pellet market likely to evolve to 2030?
- What implications will tighter raw material markets have for suppliers and buyers?

Who the report is most relevant for

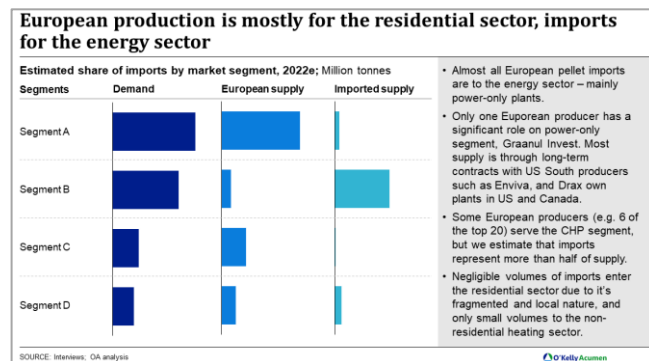
- Suppliers of raw materials; sawmills, forest owners, recyclers, energy plantations
- Pellet producers in Europe, North America
- Pulp and wood-based panel manufactures, other competing raw material consumers
- Pellet buyers in Europe and globally, e.g. power, CHP, heat generators
- Pellet distributors and logistics companies
- Investors in forestry, pellets, and bioenergy
- Analysts, consultants, financial institutions and industry associations

Example exhibits

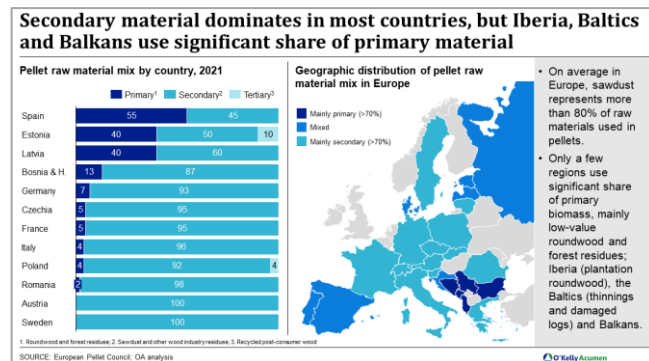
Demand forecast to 2030 by segment



Demand, domestic and import supply by segment



Pellets raw material mix in Europe by region



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- 100-page report in easy-to read slide format
- Author available for 45 min interview
- Access to some ppt slides can be discussed

Contact us for more information

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