

EU GREEN DEAL: Challenges + Opportunities for the Bioenergy Sector

BIO4ECO FINAL CONFERENCE – 17 September 2020

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Bioenergy Europe

About us



The common voice of the European bioenergy sector for the past 26 years.



Our aim is to develop a sustainable bioenergy market based on fair business conditions.



We bring together around 30 national associations and 90 companies from all across Europe.



We are an umbrella organisation for the European Pellet Council and the International Biomass Torrefaction Council.

Our members

Membership Spread

1 to 5
5 to 10
10 to 15
15+



Our members

Companies



Associations



Academia & Research Centres



1

EU
BIOENERGY
TODAY

2

RACE TO
CARBON
NEUTRALITY

3

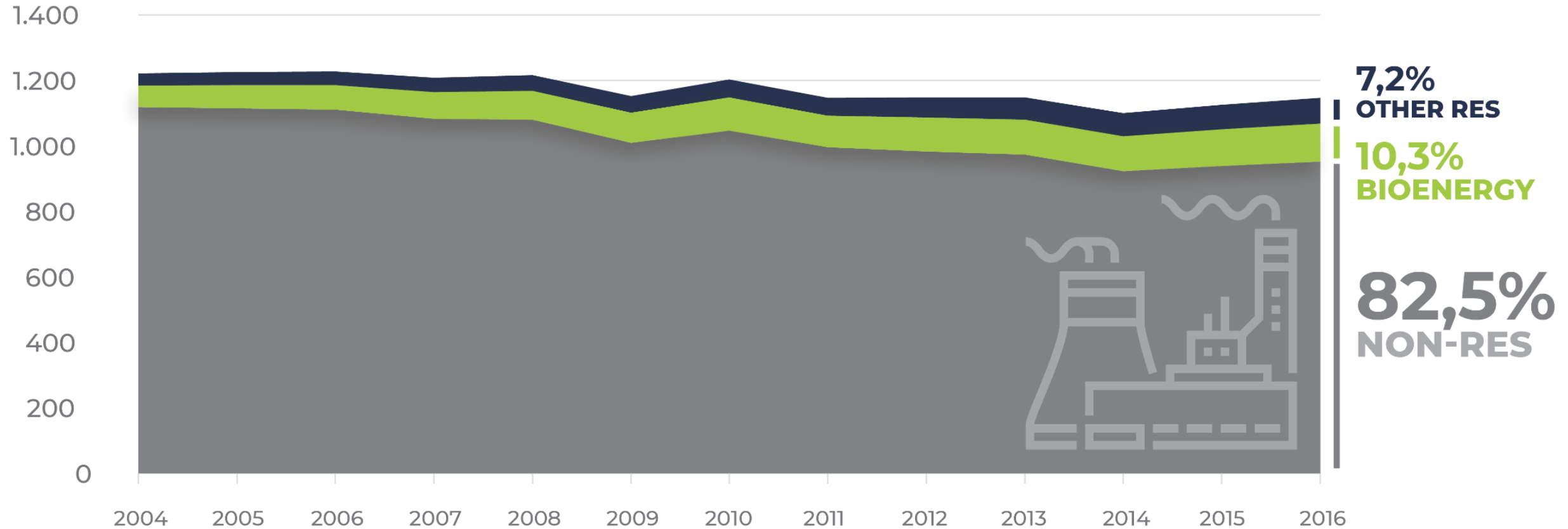
CHALLENGES +
OPPORTUNITIES

1

EU
BIOENERGY
TODAY



SO MANY THINGS TO DO SO LITTLE TIME!



EVOLUTION OF EU-28 GROSS FINAL ENERGY CONSUMPTION

(Mtoe, %) SOURCE: EUROSTAT, BIOENERGY EUROPE'S CALCULATIONS

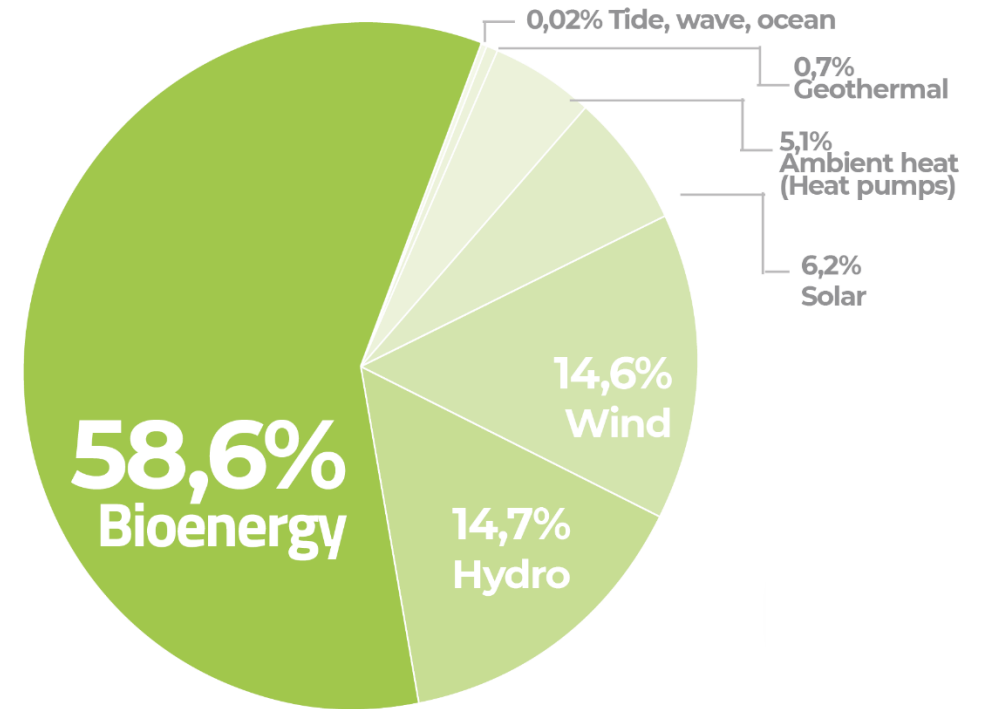
LARGEST RES IN THE EU28

10.3% of all final energy

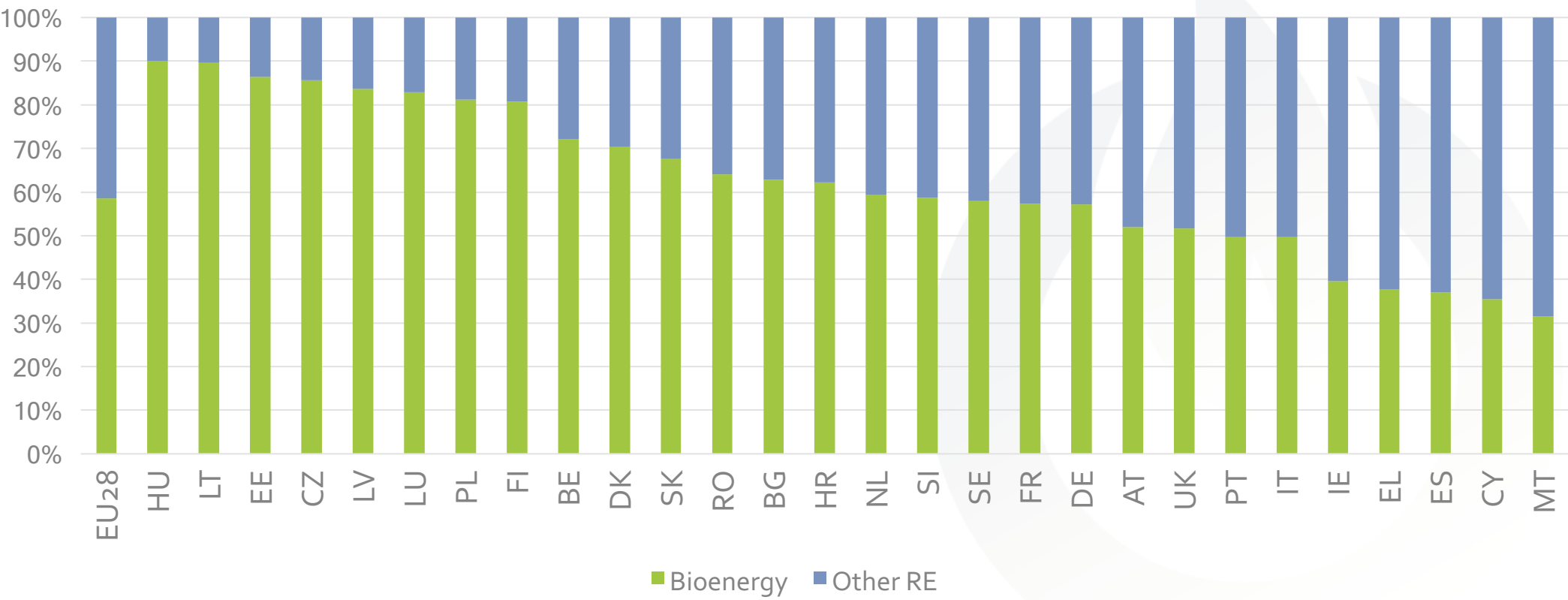
58.6% Of all renewables

DISTRIBUTION OF RENEWABLE GROSS FINAL ENERGY CONSUMPTION IN THE EU28 IN 2017

(%) Source: EUROSTAT, SHARES 2017

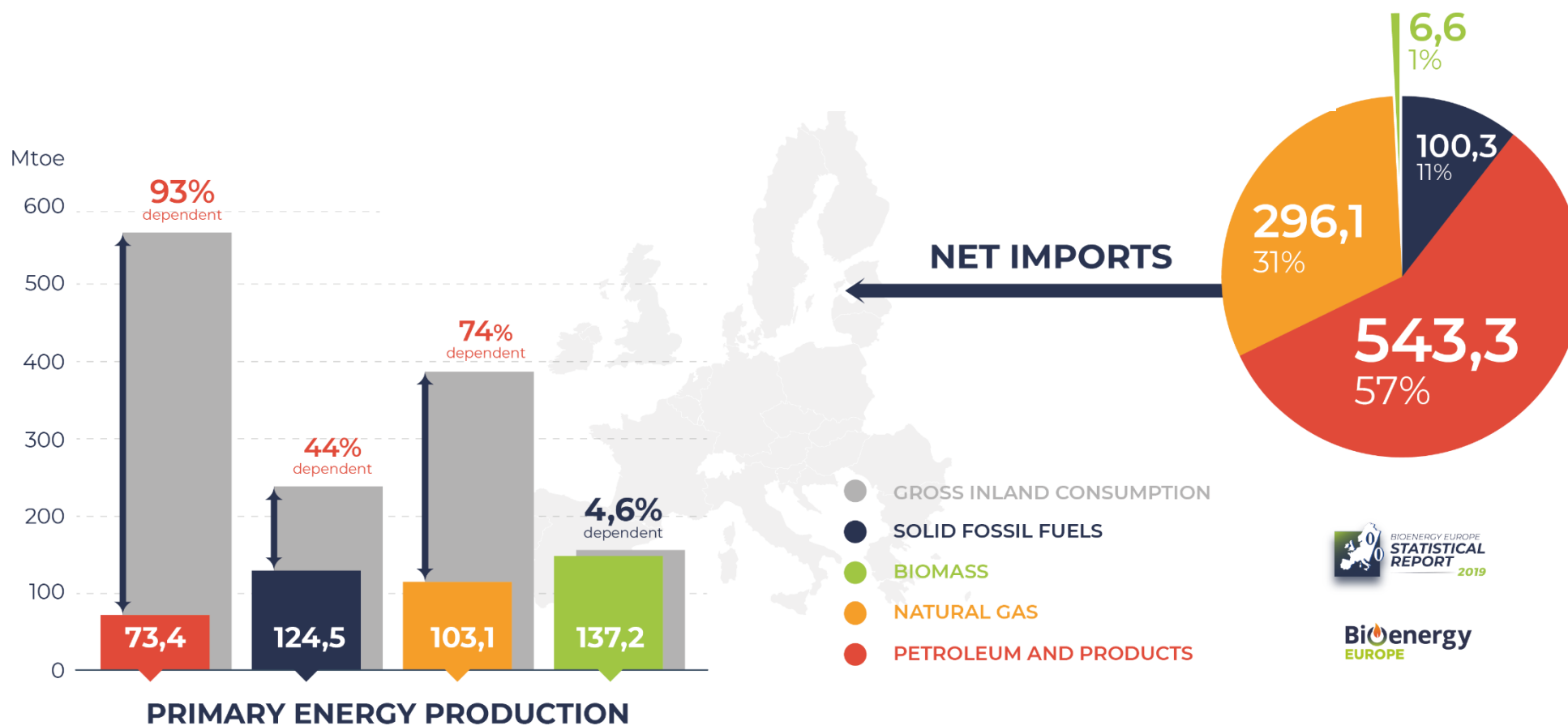


ESSENTIAL CONTRIBUTION IN ALL MS TO ACHIEVE THE EU CLIMATE AND ENERGY TARGETS



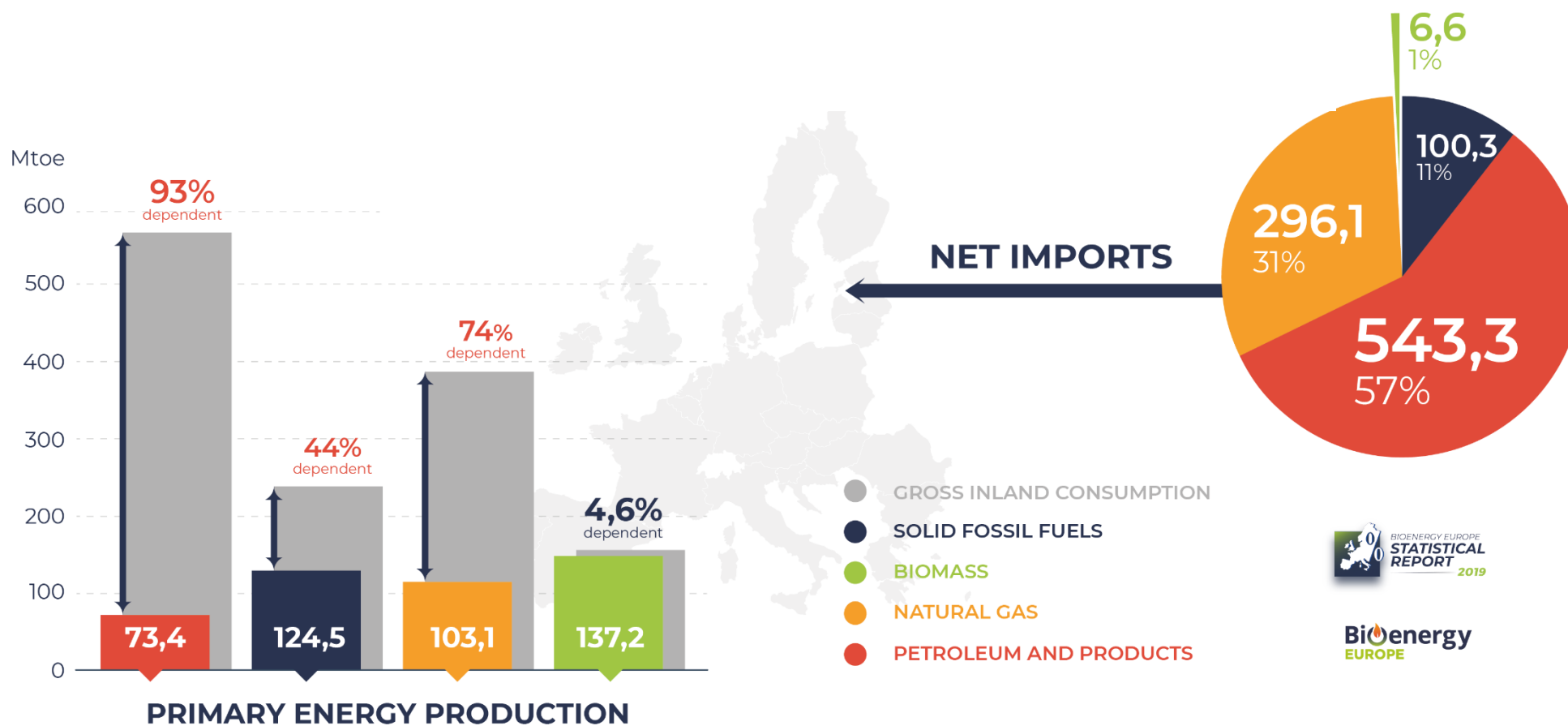
Contribution of biomass to the final renewable energy consumption in 2017 in EU28 Member States (%)

INDIGENEOUS ENERGY SOURCES FIRST!



EU-28 ENERGY DEPENDENCY AND NET IMPORTS
(IN 2017, Mtoe, %) SOURCE: EUROSTAT, BIOENERGY EUROPE'S CALCULATIONS

INDIGENEOUS ENERGY SOURCES FIRST!



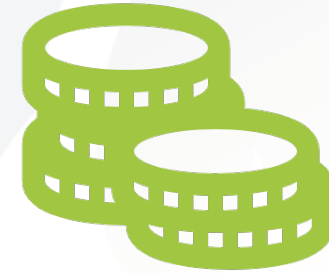
EU-28 ENERGY DEPENDENCY AND NET IMPORTS
(IN 2017, Mtoe, %) SOURCE: EUROSTAT, BIOENERGY EUROPE'S CALCULATIONS

CONTRIBUTING TO SUSTAINABLE GROWTH AND GREEN JOBS



703.200

INDIRECT JOBS

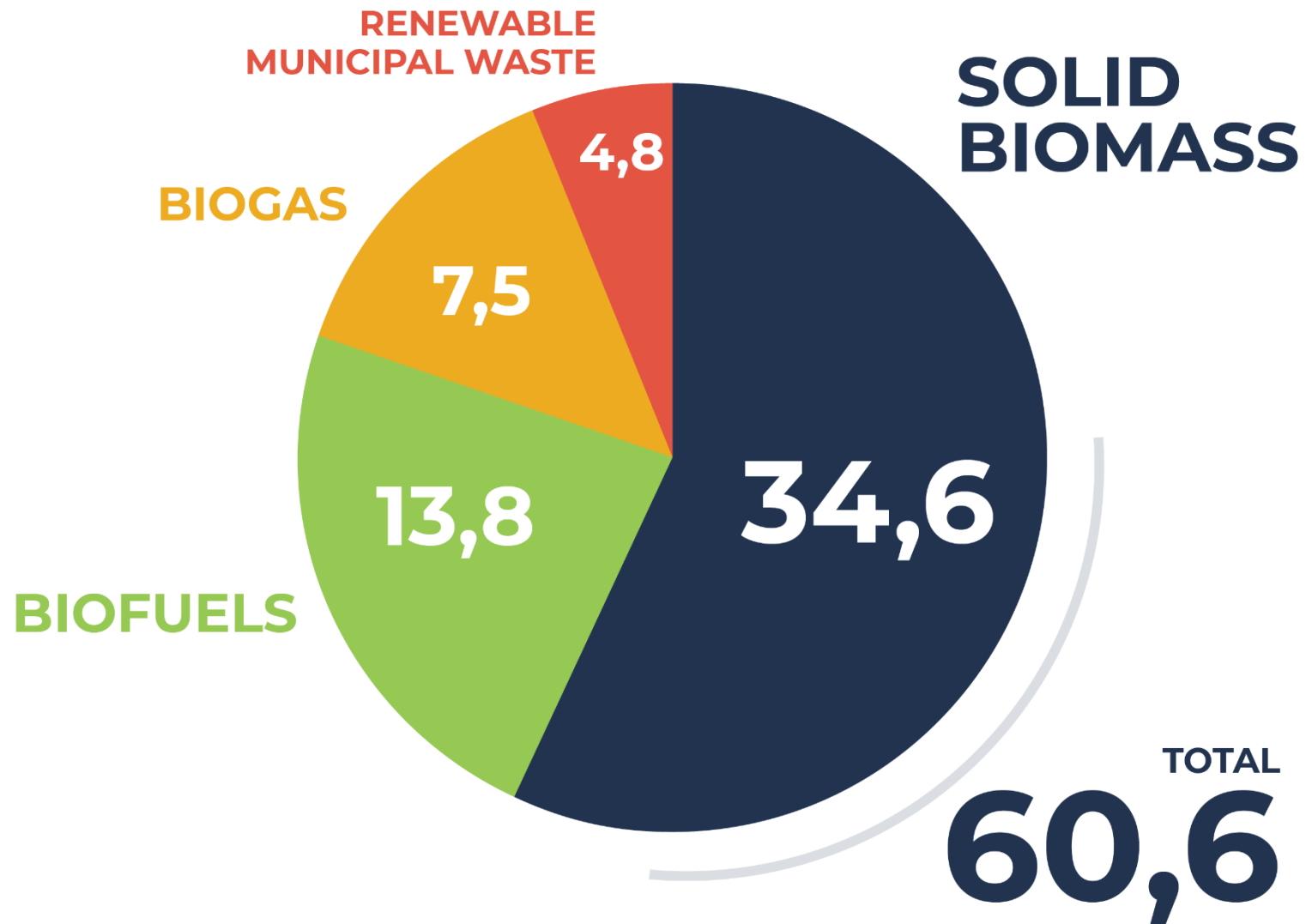


€60.6 bn

TURNOVER

TURNOVER OF THE BIOENERGY SECTOR

(IN 2017, BILLION €) SOURCE: EUROBSERV'ER



Bioenergy
EUROPE



Bioenergy
EUROPE

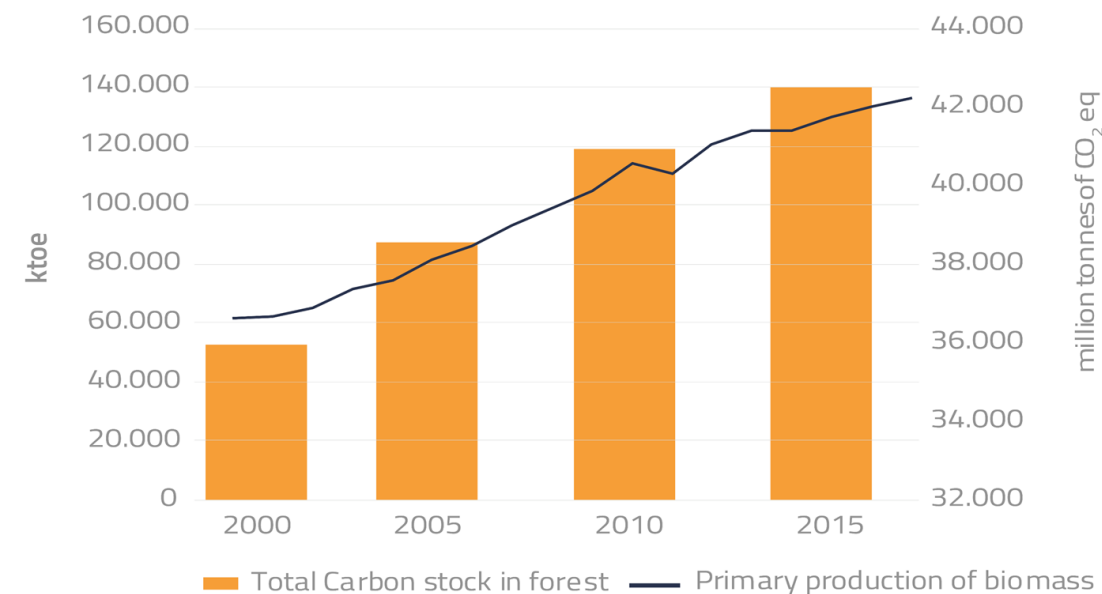
EU forest are growing hand in hand with the increase of Bioenergy

SHARE OF EU-28 WOOD REMOVALS ACCORDING TO END USE

Source: EUROSTAT, BIOENERGY EUROPE'S ESTIMATES



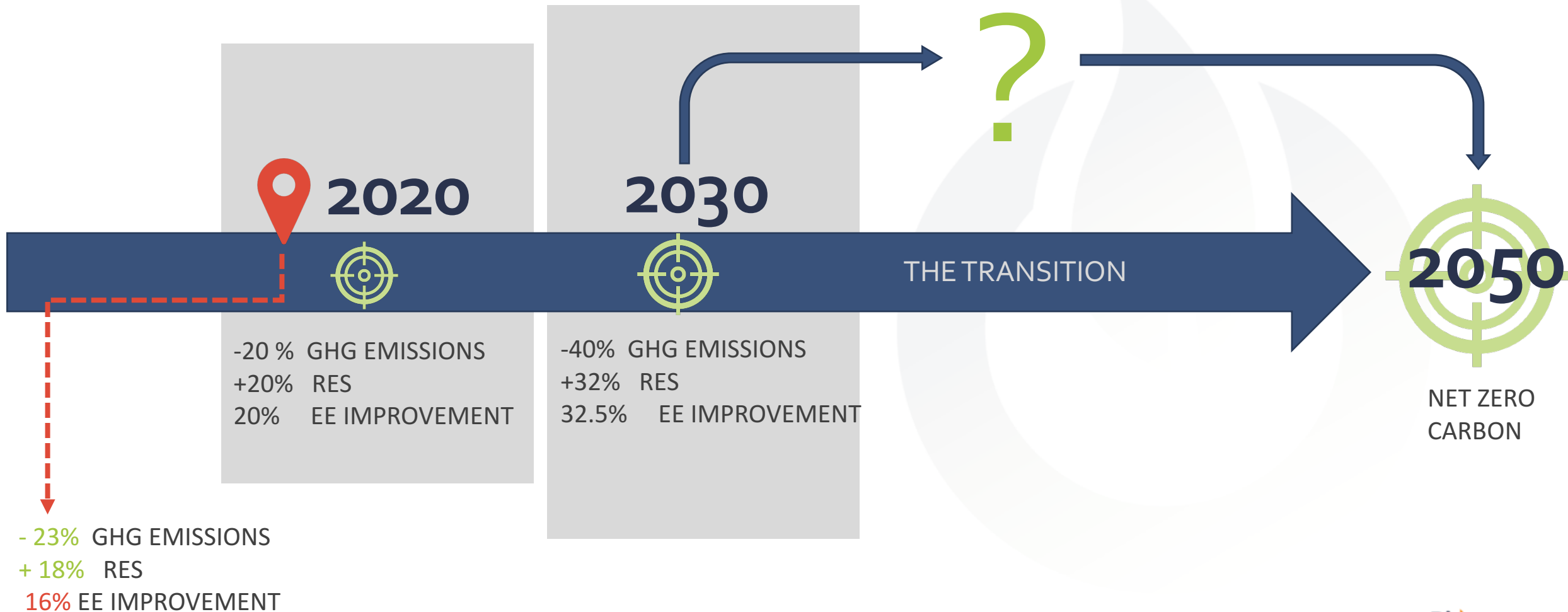
EVOLUTION OF PRIMARY PRODUCTION OF BIOMASS FOR BIOENERGY AND CARBON STOCK IN EUROPEAN FORESTS (KTOE AND MILLION TONNES OF CO₂eq) SOURCE: UNECE AND EUROSTAT



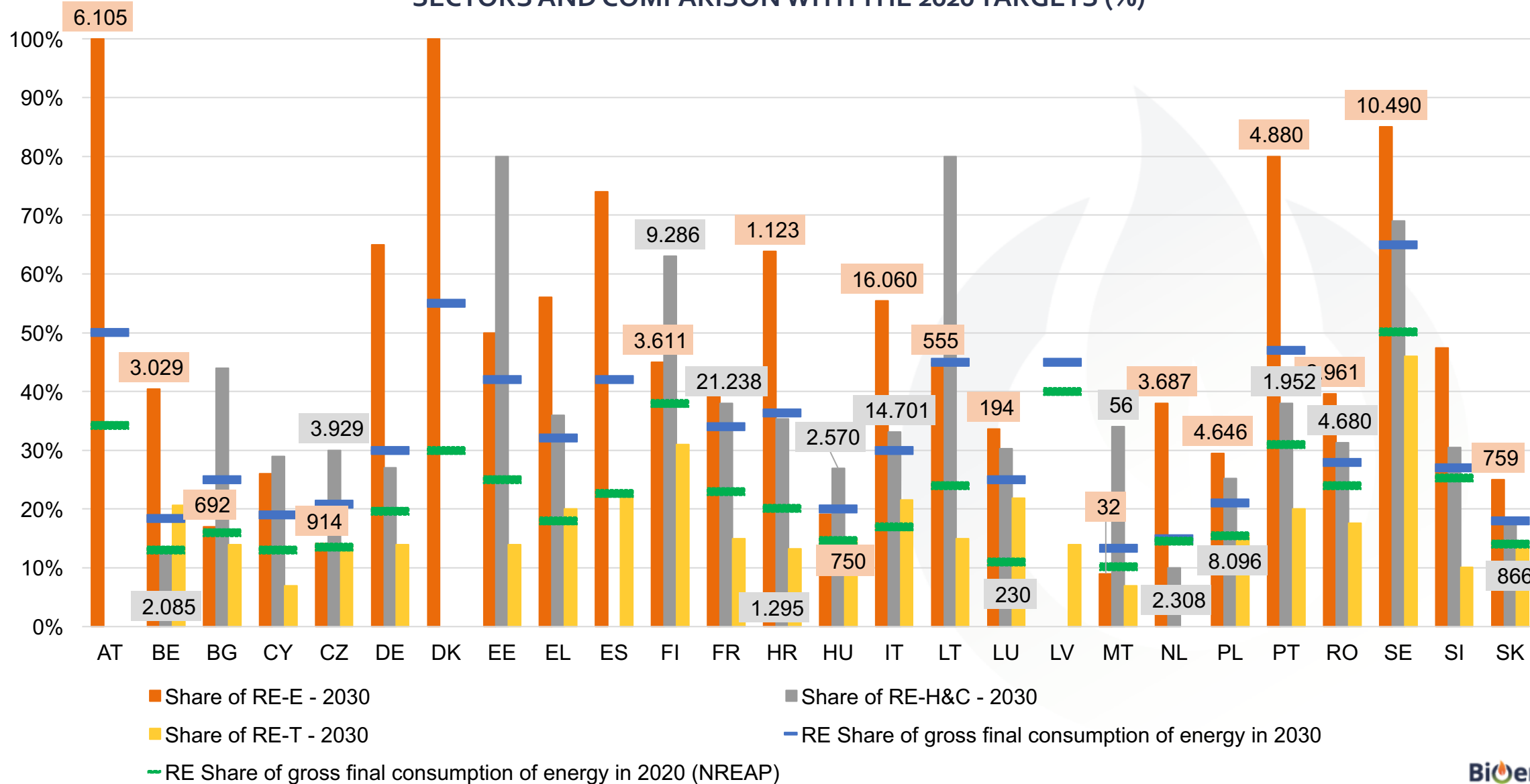
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RACE TO
CARBON
NEUTRALITY

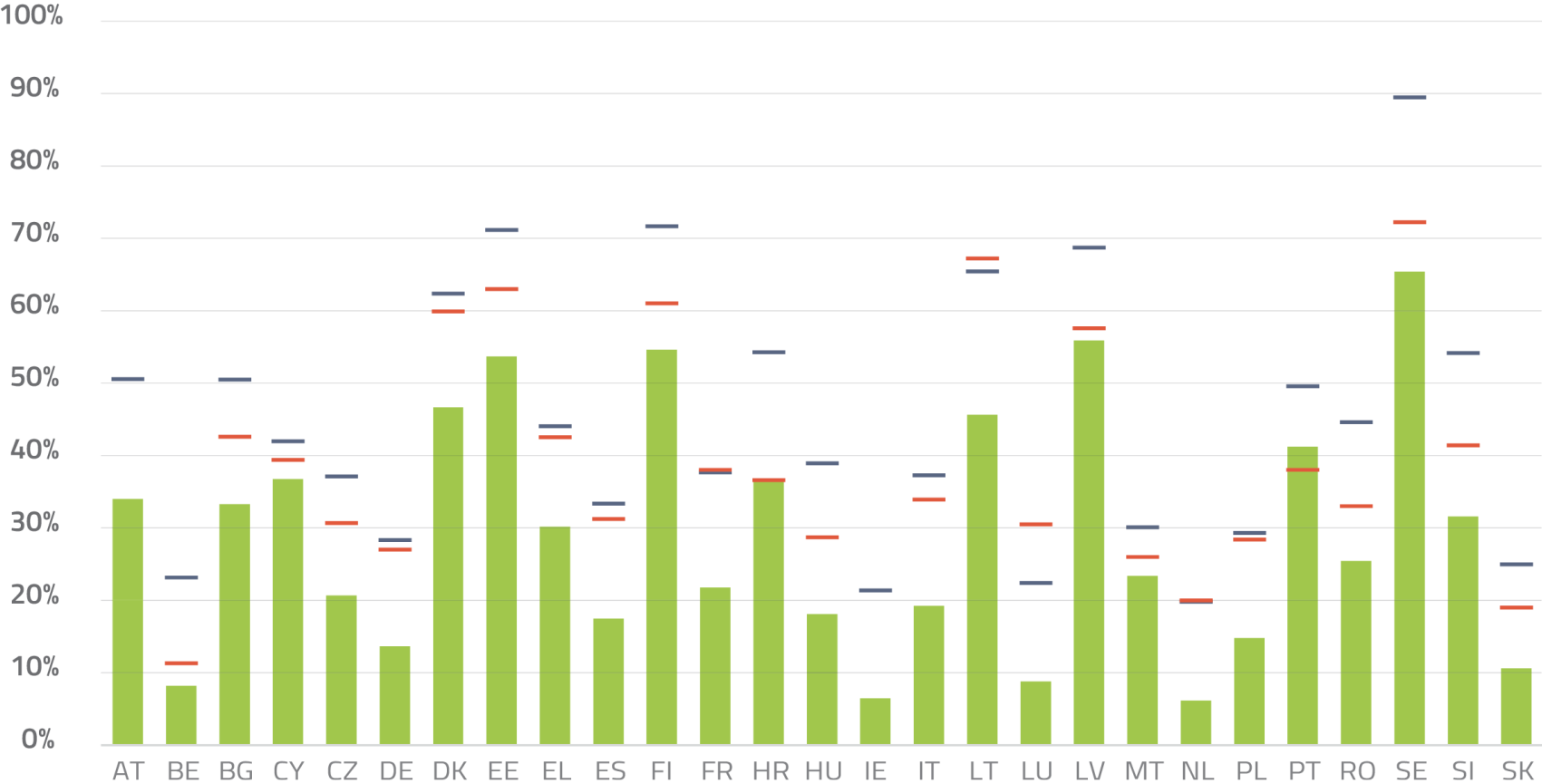
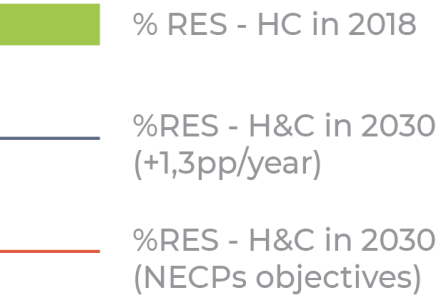
2020 TURNING POINT



2030 RENEWABLE ENERGY OBJECTIVES – SHARE OF RENEWABLE ENERGY IN THE DIFFERENT SECTORS AND COMPARISON WITH THE 2020 TARGETS (%)



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



ANALYSIS – 2030 OBJECTIVES FOR BIOENERGY

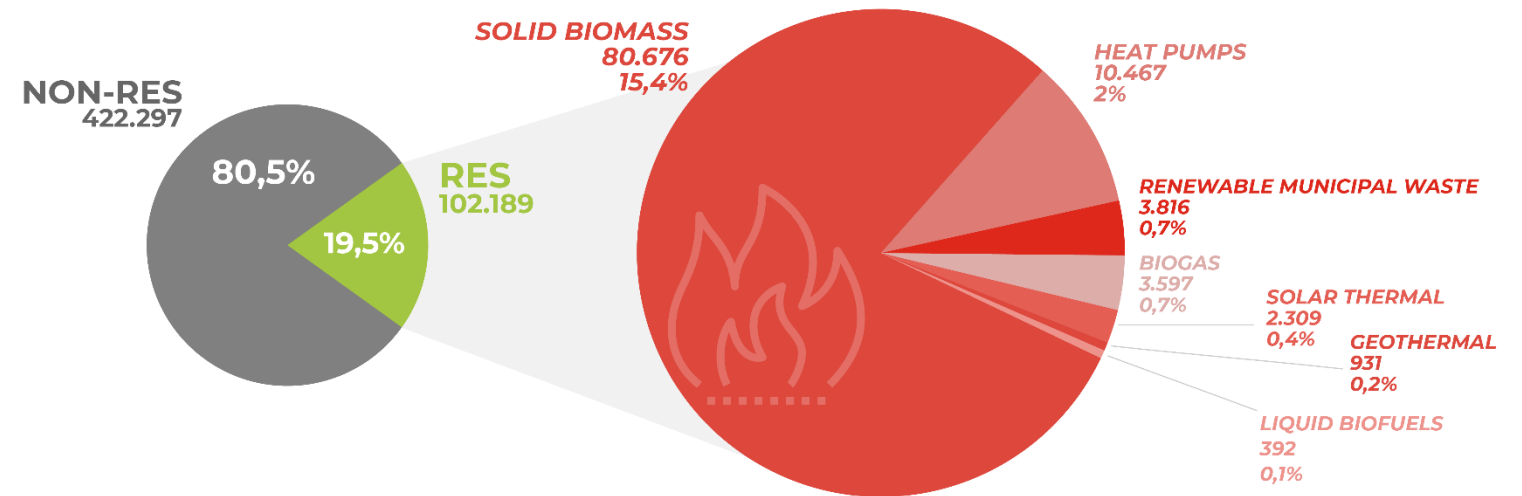
Bioenergy remains the **largest RES** source for H&C in most Member States

SHARE OF RENEWABLE ENERGY IN GROSS FINAL ENERGY CONSUMPTION FOR HEATING & COOLING IN EU28

(2017, %, KTOE) SOURCE: EUROSTAT, BIOENERGY EUROPE'S CALCULATIONS

Bioenergy
EUROPE

BIOENERGY EUROPE
STATISTICAL
REPORT
2019



2030: bioenergy remains the **main overall RES source**
(near or above 50%)

Bioenergy
EUROPE

3

EGD
CHALLENGES
+ OPPORTUNITIES

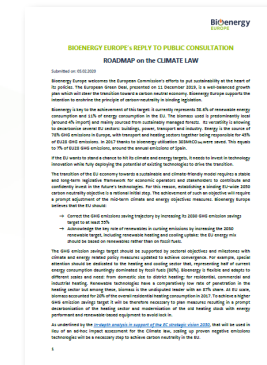


OUR TAKE ON CARBON NEUTRALITY BY 2050

Delivering the transition



- At least **-55%** by 2030
- Increased RES target by 2030
- Tackling low RES penetration in heating sector
- Increase specific RE H&C target (from 1.3 pp to 3.1)



BIOENERGY EUROPE HAS WELCOMED THE RENEWABLE ENERGY DIRECTIVE (2018/2001) SUSTAINABILITY CRITERIA INCLUDING BIODIVERSITY CONSIDERATIONS



The bioenergy sector is looking forward to the implementation of the sustainability criteria **starting 2021**.



Compliance will be key to ensure the sustainable growth of the sector. Yet, **calling for a review of such criteria before their implementation would be a premature move that would throw an important economic sector in the uncertainty.**

5. Biofuels, bioliquids and biomass fuels produced from agricultural biomass taken into account for the purposes referred to in points (a), (b) and (c) of the first subparagraph of paragraph 1 shall not be made from raw material obtained from land that was peatland in January 2008, unless evidence is provided that the cultivation and harvesting of that raw material does not involve drainage of previously undrained soil.

6. Biofuels, bioliquids and biomass fuels produced from forest biomass taken into account for the purposes referred to in points (a), (b) and (c) of the first subparagraph of paragraph 1 shall meet the following criteria to minimise the risk of using forest biomass derived from unsustainable production:

(a) the country in which forest biomass was harvested has national or sub-national laws applicable in the area of harvest as well as monitoring and enforcement systems in place ensuring:

(i) the legality of harvesting operations;

(ii) forest regeneration of harvested areas;

(iii) that areas designated by international or national law or by the relevant competent authority for nature protection purposes, including in wetlands and peatlands, are protected;

(iv) that harvesting is carried out considering maintenance of soil quality and **biodiversity** with the aim of minimising negative impacts; and

(v) that harvesting maintains or improves the long-term production capacity of the forest;

PRIVATE FINANCE WILL BE KEY TO SCALE UP BIOENERGY PROJECTS AND R&D



THREATS:

- Sustainability screening not consistent with REDII in certain cases unrealistic
- No existing certification able to guarantee compliance
- Requirements on forestry de facto excluding small forest holders



SIMPLIFIED COMPLIANCE AND COHERENCE WITH EXISTING SUSTAINABILITY CRITERIA



THANK YOU!

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