



Introduction

Megatrends:

Climate change

Energy crisis

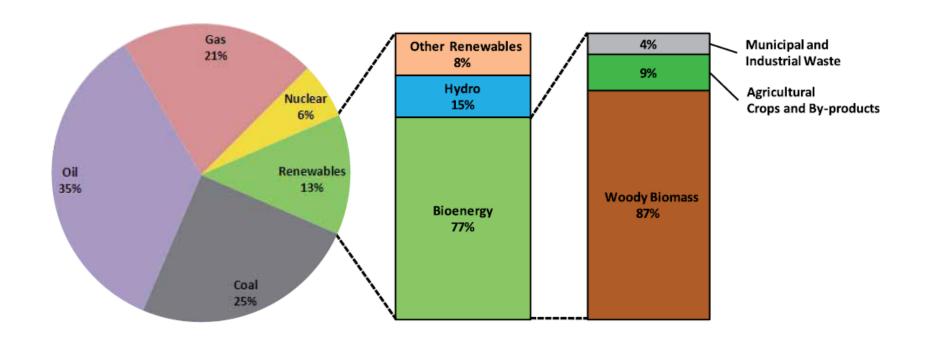
Urbanization

> Energy transition

Sustainable supply and consumption



Introduction



Share of bioenergy in the world primary energy mix



Introduction

> Two definitions

Biomass consists of any organic matter of vegetable or animal origin.

Biomass energy is solar energy stored in the chemical bonds of carbon and hydrogen chains as a result of photosynthesis or the metabolic activity of organisms.



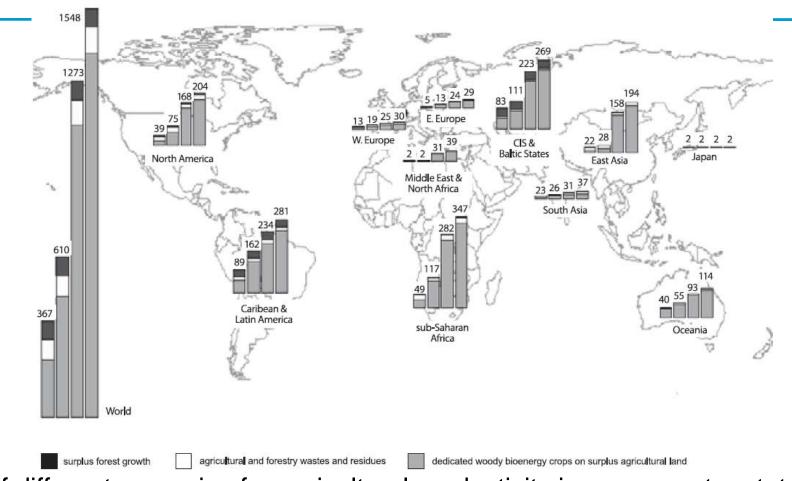
Biomass Yields of Food and Lignocellulosic Crops

Сгор	Crop yield (fresh tonne/ha/yr)	Net Energy yield in fuel (GJ/ha/ yr) [3]	By-products	
Conventional energy crops [1]				
Wheat	5.1	~ 15	Straw	
Corn	9.2	19- 37	Stover, straw, DDGS	
Sugar-beet	58.5	~ 111	Sugar-beet pulp	
Sugar-cane	73.1	84-152	Bagasse, tops and leaves	
Soy beans	2.7	12-13	Glycerine, seed cake	
Palm oil (fresh fruit bunches)	19.2	~ 140	Palm kernel shells, PFAD, glycerine	
Rape seed	2.9	28	Glycerine, seed cake	
Jatropha seeds	4-7	~ 40	Seed cake	
Lignocellulosic energy crops [2]				
Woody crops, e.g. poplar, willow, Eucalyptus	10 – 15	90-110		
Perennial herbaceous crops, e.g. <i>Miscanthus</i> , switchgrass, reed canary grass	10 – 30	140 – 230		
Prairie grasses (low-input system, degraded lands)	3 – 6	18-28		

Sources: 1. Yields based on Sims et. al. (2006), EEA (2007), Berndes (2001) Tilman et al., (2006) and Smeets (2008); 2. Sims et al., (2006) for wheat, corn, sugar-beet and rape seed, Smeets et al., (2008) for sugar-cane, Donato and Huerga (2007) for soy, Wicke et al., (2008) for oil, Berndes (2001) & Fischer et al., (2007) for lignocellulosic energy crops, Tilman et al., (2006) for corn and prairie grasses.



Biomass potential

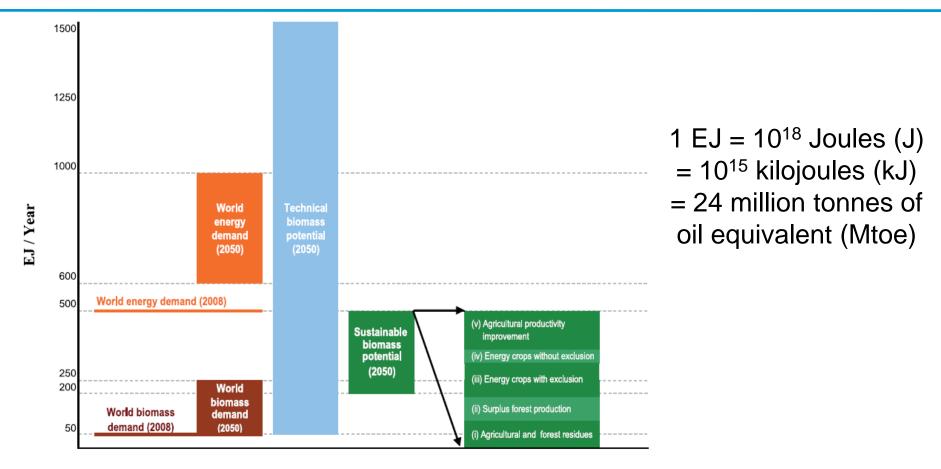


Impact of different scenarios for agricultural productivity improvement on total technical bioenergy production potential in 2050

cen



Biomass potential

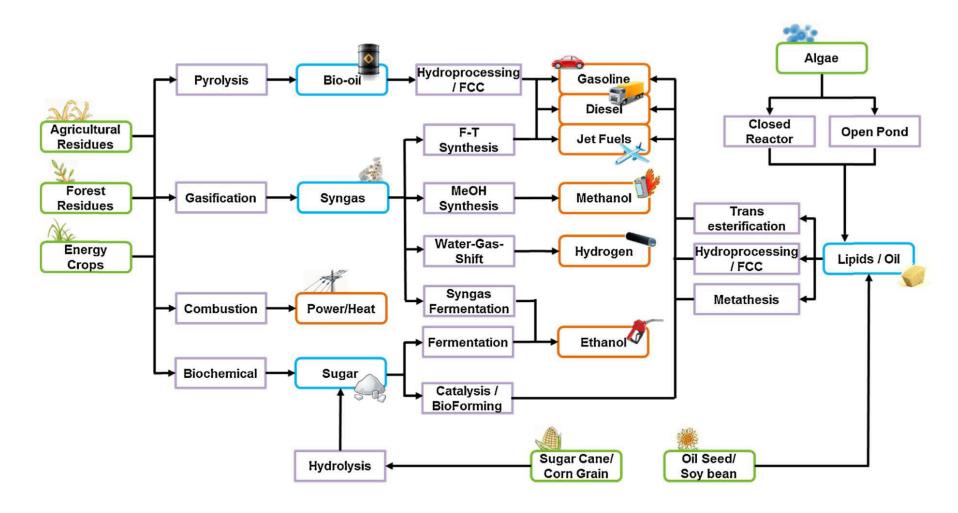


Technical and sustainable biomass supply potentials and expected demand for biomass



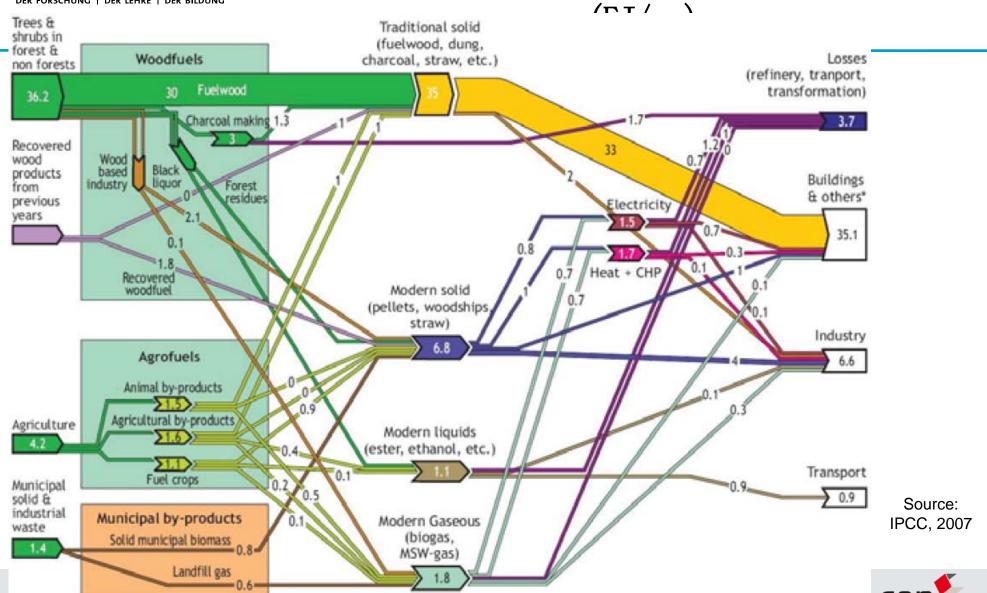


Biomass sources and conversion pathways



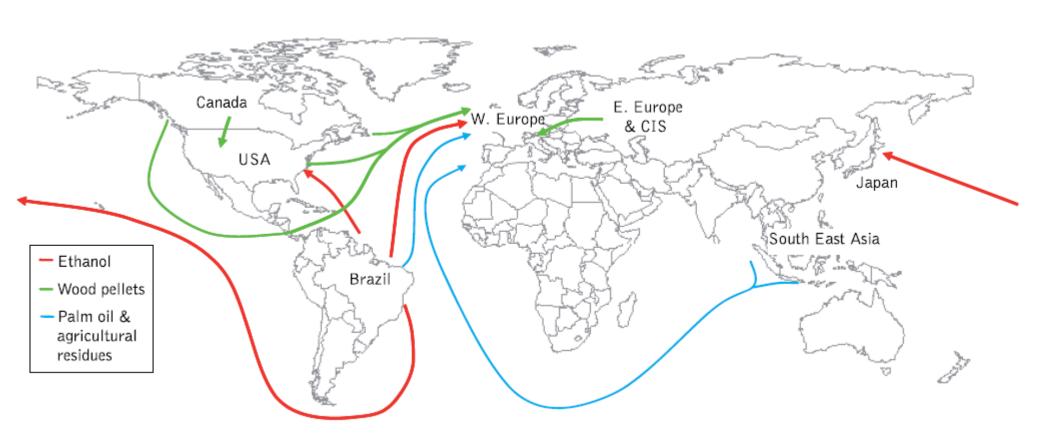


Bioenergy flows into final application





Cycle of Bioenergy industry



Main international biomass for energy trade routes

(Source: Junginger and Faaij, 2008)



Estimated scope of international biomass trade

	PJ	Million tonnes
Ethanol	160	6
Biodiesel	>90	>2.4
Fuelwood	40	3
Charcoal	20	0.9
Wood pellets	45	2.6
Palm oil	>60	>1.6
Direct trade	>380	>16.7
Industrial round wood	480	50
Wood chips and particles	150	16
Indirect trade	630	66
Total	>1000	>83

Source: adapted from Heinimö and Junginger, 2009





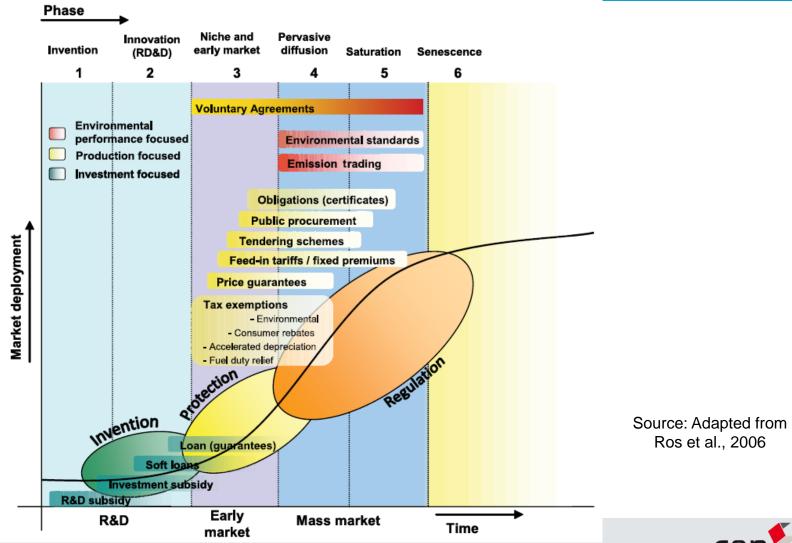
Key motivations for bioenergy policy

	Objectives								
Country	Climate change	Environment	Energy security	Rural development	Agricultural development	Technological progress	Cost		
Brazil	Χ	Χ	Χ	Χ	Χ	Χ			
China	Χ	Χ	Χ	Χ	Χ				
India			Χ	Χ		Χ	X		
Mexico	Χ	Χ	Χ	Χ		Χ			
South Africa	Χ		Χ	Χ					
Canada	Χ	Χ	Χ			Χ			
France	Χ		Χ	Χ	Χ				
Germany	Χ	Χ		Χ	Χ	Χ	X		
Italy	Χ		Χ		Χ				
Japan	X	X			X	X			
Russia	Χ	Χ	Χ	Χ	Χ	Χ			
UK	Χ	Χ	Χ	Χ			Χ		
US		Χ	Χ	X	Χ	Χ			
EU	X		Χ	X	X	X			

Source: GBEP, 2007



Policy instruments for each technology development stage





Policy mix

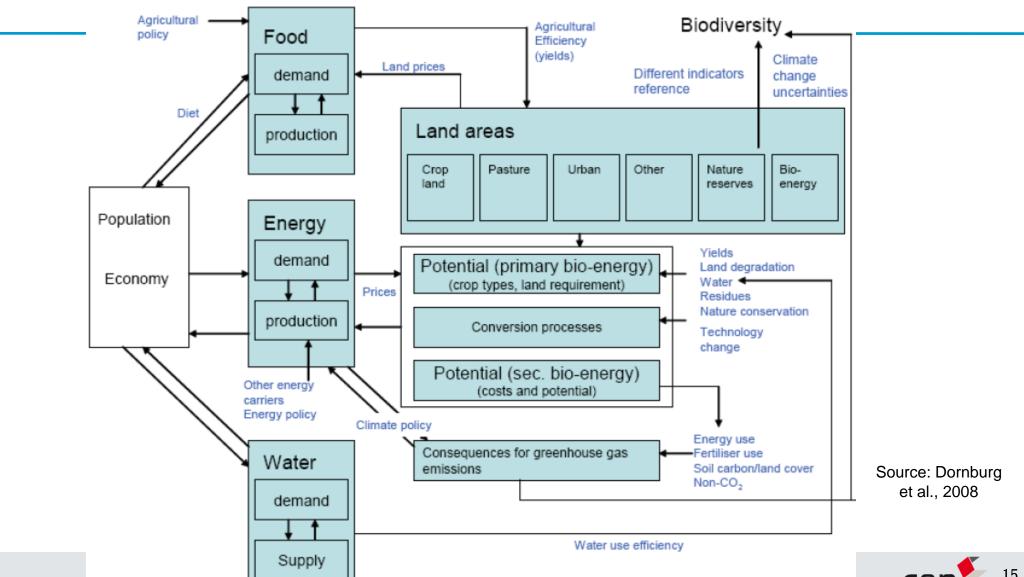
	Energy Policy								
Country	Binding targets/ Mandates ¹	Voluntary targets¹	Direct incentives ²	Grants	Feed-in tariffs	Compulsory grid connection	Sustainability criteria	Tariffs	
Brazil	E,T		T					Eth	
China		E,T	T	E,T	E,H	E,H		n/a	
India	T,(E*)		Е	E,H,T	Е			n/a	
Mexico	(E*)	(T)	(E)			(E)		Eth	
South Africa		E,(T)	(E),T					n/a	
Canada	E**	E**, T	Т	E,H,T				Eth	
France		E*,H*,T	E,H,T		Е			As EU below	
Germany	E*,T		Н	Н	Е	Е	(E,H,T)	As EU below	
Italy	E*	E*,T	T	E,H	Е	Е		As EU below	
Japan		E,H,T				Е		Eth, B-D	
Russia		(E,H,T)	(T)					n/a	
UK	E*,T*	E*,T	E,H,T	E,H	Е		T	As EU below	
USA	Т	E**	E,H,T	E,T	Е			Eth	
EU	E*,T	E*,H*,T	T	E,H,T		Е	(T)	Eth, B-D	

E: electricity, H: heat, T: transport, Eth: ethanol, B-D: biodiesel

Source: GBEP, 2007



Key relationships relevant to bioenergy projects implications





Debate:

Should we develop the bioenergy industry or not?



Bioenergy and policy objectives

Debate rules:

Role play: 6 persons in each group (chair speaker, farmer, bioenergy plant operator, food consumer, energy consumer, governor)

Topic: "SEE" analysis

Procedure:

- 1. State positions: chair speakers in both teams present the constructive arguments
- 2. Free debate: 5 following debaters play their roles
- 3. Conclusion: chair speakers restate their arguments



"SEE" benefits

"SEE" Supply chain actors Stakeholders **Benefits** Securing national energy security Government Improving quality of life in rural area High employment creation Rural area regeneration Farmers/ Increasing social participation Forest owners Ameliorating rural logistic system NGOs & **Research Institutes** Saving foreign reserve Balanced regional economic development Haulers Diversification of income opportunities Decrease energy expenditure in rural area Residents & Encourage investment in rural area Local communities Energy industry/ plant operators Reduced GHG emission Reduced indoor air pollution End-user & Resource conservation & ecosystem rehabilitation Public in general **Enhancing Waste utilization**



"SEE" challenges

"SEE" Supply chain actors Stakeholders Challenges Unclear and complex legislative issues Government Food security Stakeholders participation Absence of sustainability criteria for bioenergy Farmers/ Lorry/ traffic congestion Forest owners NGOs & Insufficient incentives for industry development Research Institutes Uncertain cost-efficiency Haulers Immature bioenergy market Uncertainty of relevant technology Residents & Local communities Land use conflict between food and energy Energy industry/ Biodiversity and landscape conservation plant operators Unsustainable use of water use resource Use of chemicals and soil health End-user & Odors, noise and pollutant emissions Public in general Adaptation capacity to climate change



Key Characteristics of Several Biomass Sustainability Certification Initiatives

Check list	Green Gold Label	Electrabel Label	Government (BE)	RTFO (UK)	NTA 8080 (NL)	RSP0	RED (EU)	RSB
Type of biomass		All biomass for heat and electricity	All biomass for heat and electricity	Biomass for biofuels	All biomass	Palm oil	Biomass for biofuels	Biomass for biofuels
Status	Certification in implementation, also in development	Certification in implementation, also in development	Green certificates linked to GHG / energy criteria	Implemented since 2008	Principles developed, testing phase C&I (pilot studies)	Principles developed, testing phase C&I (pilot studies)	Standards developed; detailed design through 2009.	In developmen
GHG and/or energy balance	+ (included in GGLS8)	+	+	+	+	+	+	+
Biodiversity	+	-	-	+	+	+	+	+
Competition with food	-	-	-	-	+	-	-	+
Leakage	-	-	-	-	_35	-	-	+
Economic well- being	_36	-	-	+	+	+	_37	+
Welfare / social criteria	-	-	-	+	+	+	_ 37	+
Environmental criteria	+	+	-	+	+	+	_ 37	+
Type of system ³⁸	Track-and-trace Sourcing	Track-and-trace Sourcing	Cooperation with e.g. Electrabel, SGS	Meta- standard	Track-and- trace, mass balance or book and claim, currently under consideration.	Track-and- trace, mass balance or book and claim	Mass balance	Not yet determined
Organisation	Established by company Essent, now open for 3 rd parties	Label is developed by company Electrabel	Government provides Green Certificate based on criteria compliance	Administered by Renewable Fuels Agency, a UK government body	Initiated by	Roundtable with stakeholders in palm oil production	Evolving – probably mixture of government and private schemes.	Roundtable with multi- stakeholder participation
Verifier	Control Union	SGS	Independent 3 rd party verification	Independent 3 rd party verification	Requirements not yet determined	Verifier working group (in progress)	Independent 3 rd party verification	Not yet determined
Relation to national policies	Stimulated by policy	Required by law	In regional policy (in development)	Embedded in national policy	NTA 8080 will be coupled to subsidy (only) for biomass for heating and electricity	On voluntary basis	Will be embedded in national policies	Not yet determined
(Plans to) make use of existing systems		Yes (e.g. FSC)	See Electrabel	Yes – meta- standard approach	Will apply e.g. FSC, and GGL	Makes use of existing systems	Will make use of existing systems	Yes – meta- standard approach

Source: van Dam et al., (2008) updated to July 2009







