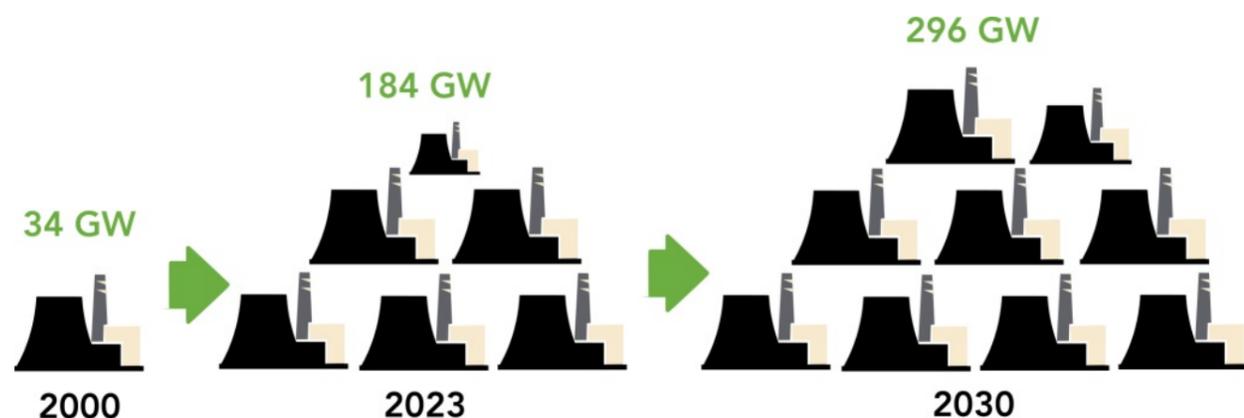


The global threat from biomass energy development

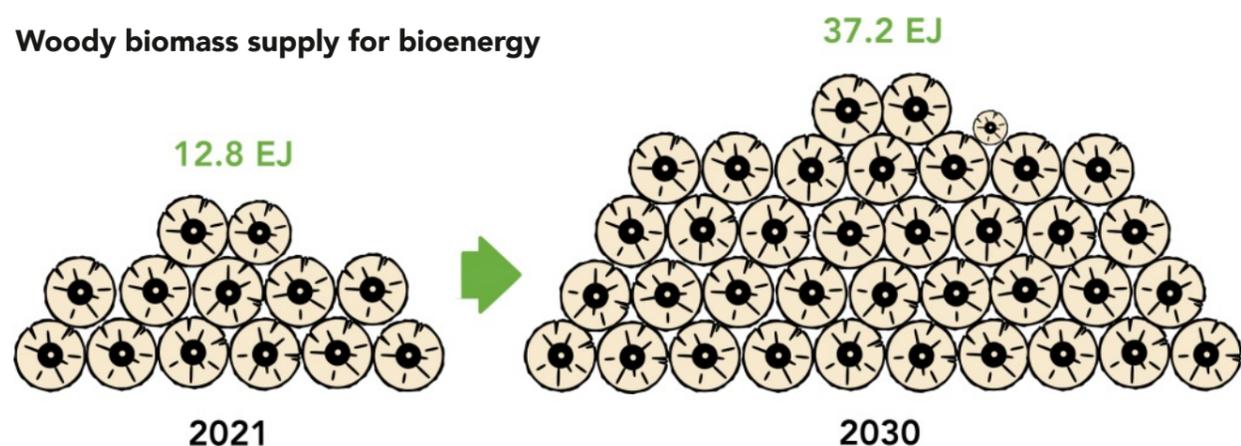
Since 2000, the electricity capacity of bioenergy facilities has increased more than fivefold. The International Energy Agency (IEA) Net Zero Scenario forecasts further growth by 90% by 2030.

Global electricity capacity of bioenergy facilities in IEA Net Zero Scenario

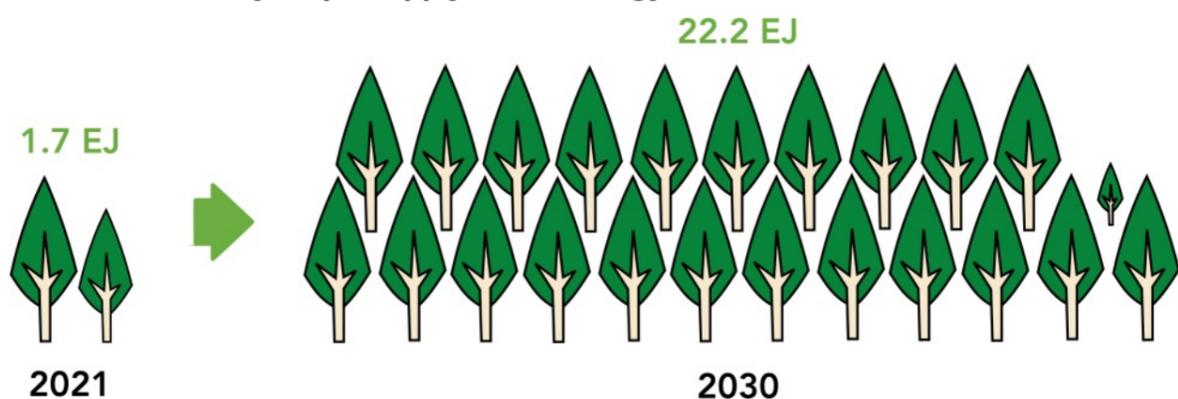


To fuel this growth, the IEA in its Net Zero Scenario provides for tripling the woody biomass supply for bioenergy between 2021 and 2030, including an up to thirteenfold increase in supply of wood from short rotation woody crops.

Woody biomass supply for bioenergy

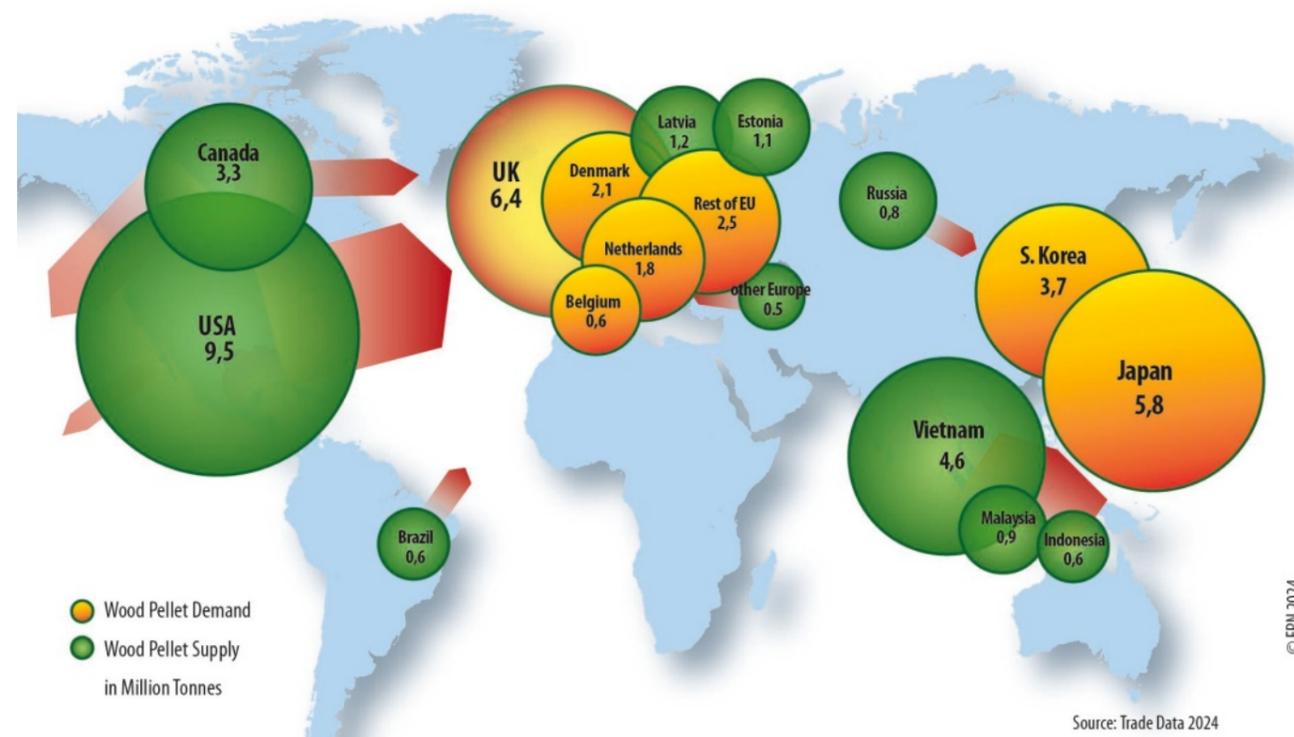


Short rotation woody crops* supply for bioenergy



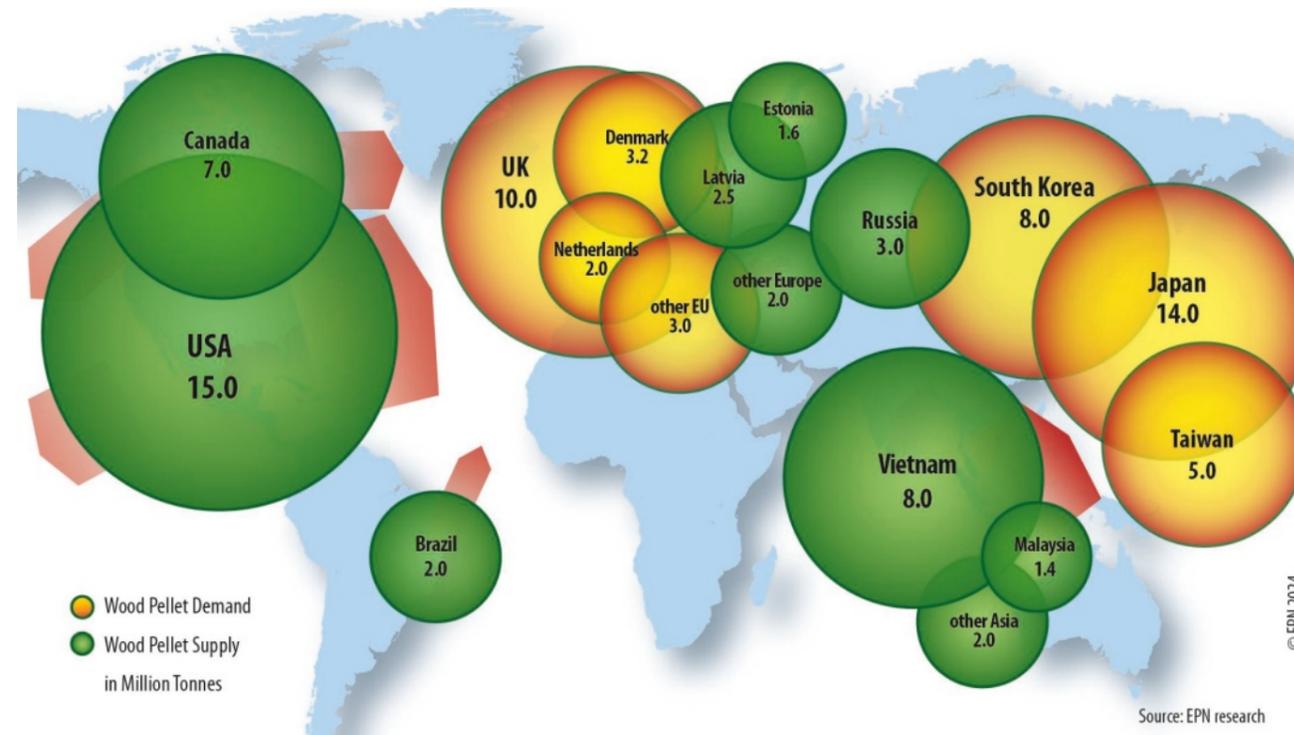
* This includes supplying woody biomass from monoculture plantations of fast-growing trees such as eucalyptus, willow and poplar and other woody species such as miscanthus.

Import and export of wood pellets in 2023



Source: Trade Data 2024

Import and export of wood pellets in 2030



Source: EPN research

Figures 2a & 2b: Import and export of wood pellets reached nearly 23 million tonnes in 2023, an increase of over 60% compared to 2017. By the end of this decade, international trade of wood pellets is expected to double to over 45 million tonnes. The most significant increases are expected in East Asia, while demand in Europe will increase at a lower rate.ⁱⁱ

ⁱⁱ The maps show the major imports and exports of wood pellets. This does not include pellets produced and consumed in the same country. 2023 data was based on available trade statistics, whereas 2030 projections are based on information about planned pellet mills and co-firing facilities as well as assumptions about the development of national policies regarding bioenergy, taking into account National Energy and Climate Plans (NECPs).