



Wood-using industries and woody biomass

The case of the European Pulp and Paper Industries

October 2003



RES is not a fad



- **EU White Paper on renewable energy sources**
- **RES-Electricity Directive**
- **« Intelligent Energy for Europe » Programme**
- **EU policy options on RES-Heat**
- **Communication on RES**
- **Johannesburg Renewable Energy Coalition (JREC)**

« We express our strong commitment to the promotion of renewable energy and to the increase of the share of renewable energy sources in the global total primary energy supply. »



Wood at the intersection



Raw material

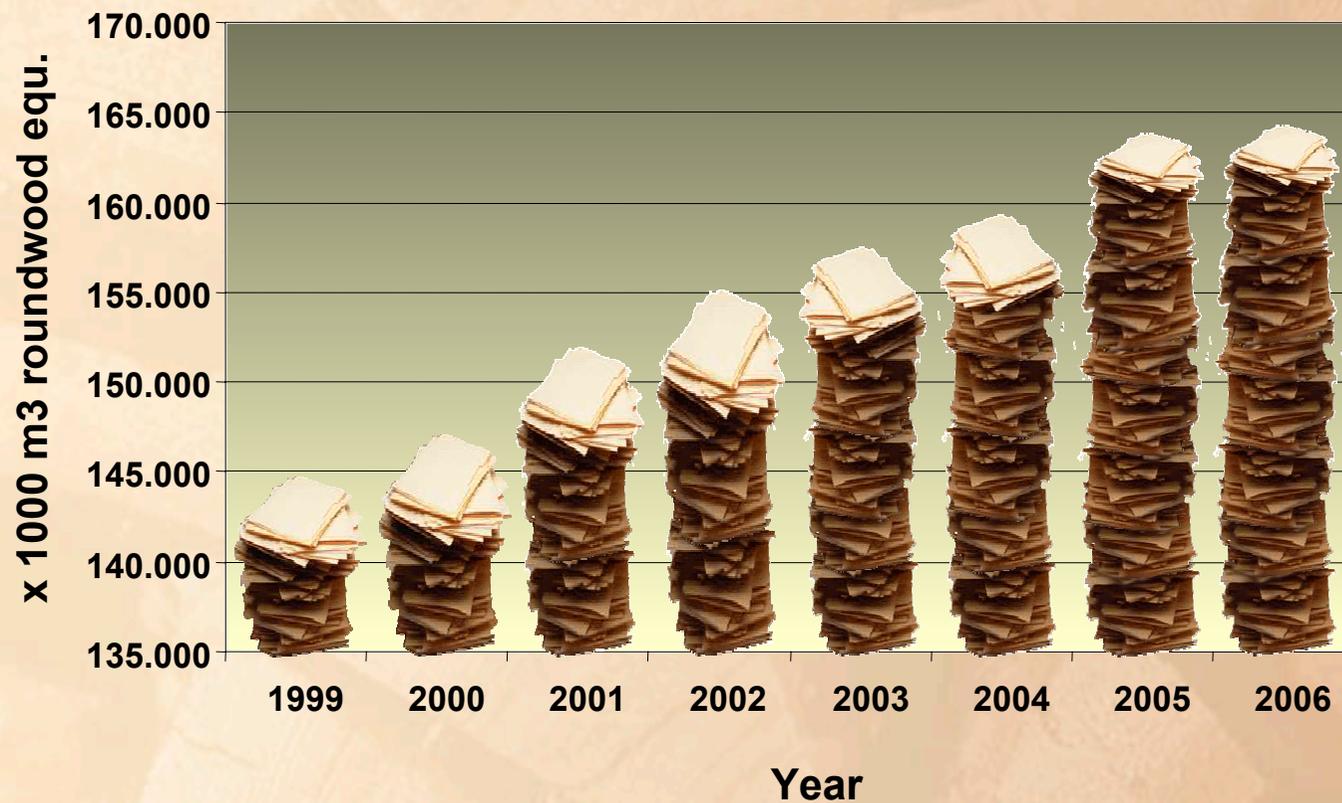
Energy



Nature



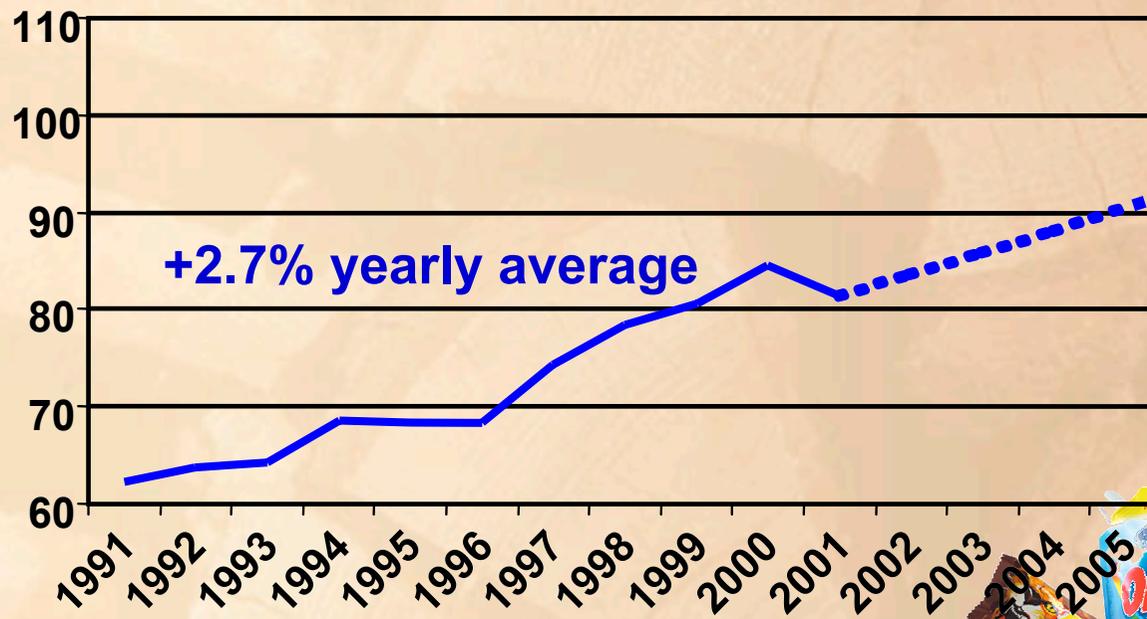
Industry's increasing capacity



Forecasts of paper and board consumption



Million tonnes

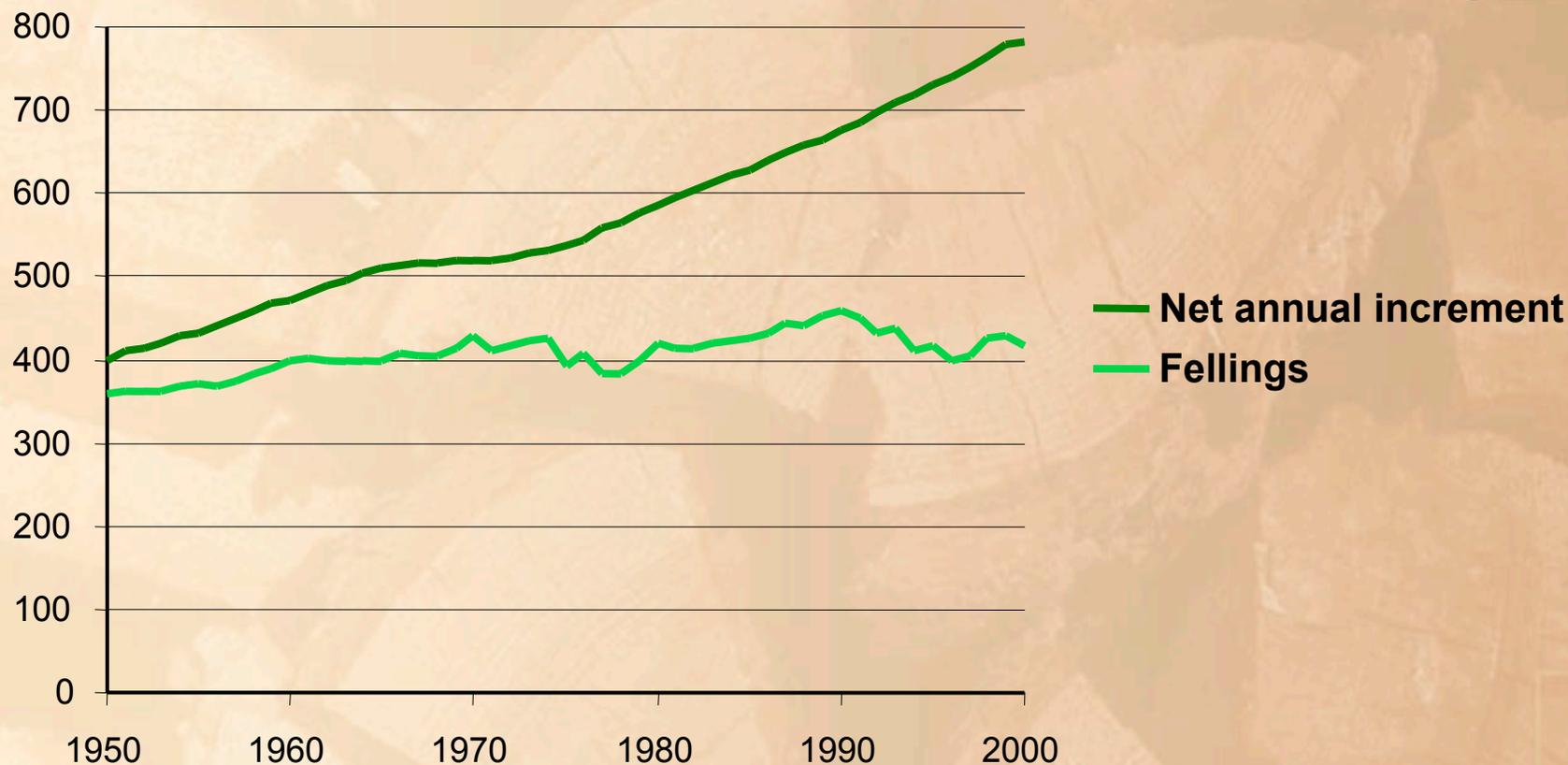


Extrapolation for the period 2002-2005



Forest – a growing resource

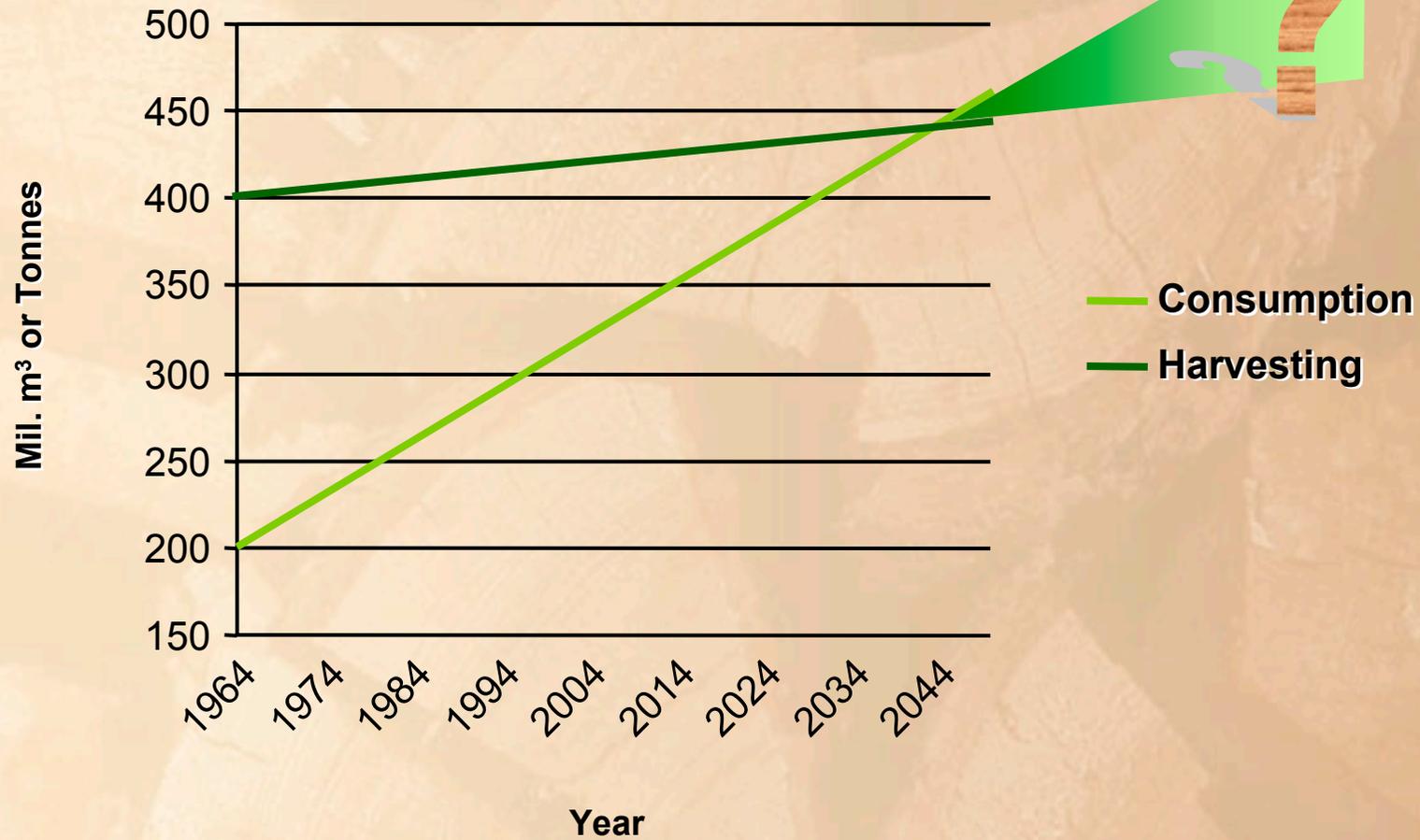
Mil. m³ over bark



25 m³/sec. of which 12 are not used



Looking into the future ...



Nature-oriented management



Enhance nature conservation values in the forests



Reduced harvesting

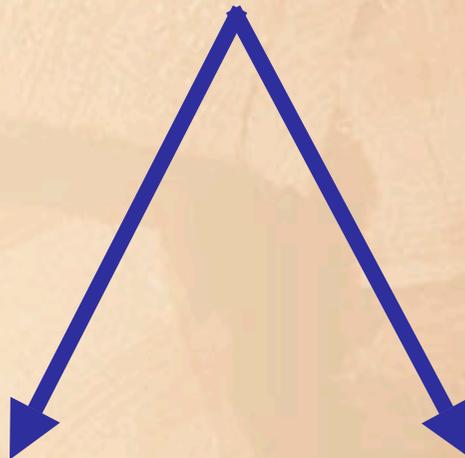
**Changed wood quality
and type**



Climate change



Enhance forest potential to sequester carbon



Postponed harvesting

Changing management practices



Renewable energy



Promote the use of wood as a source of renewable energy



Competing use of wood



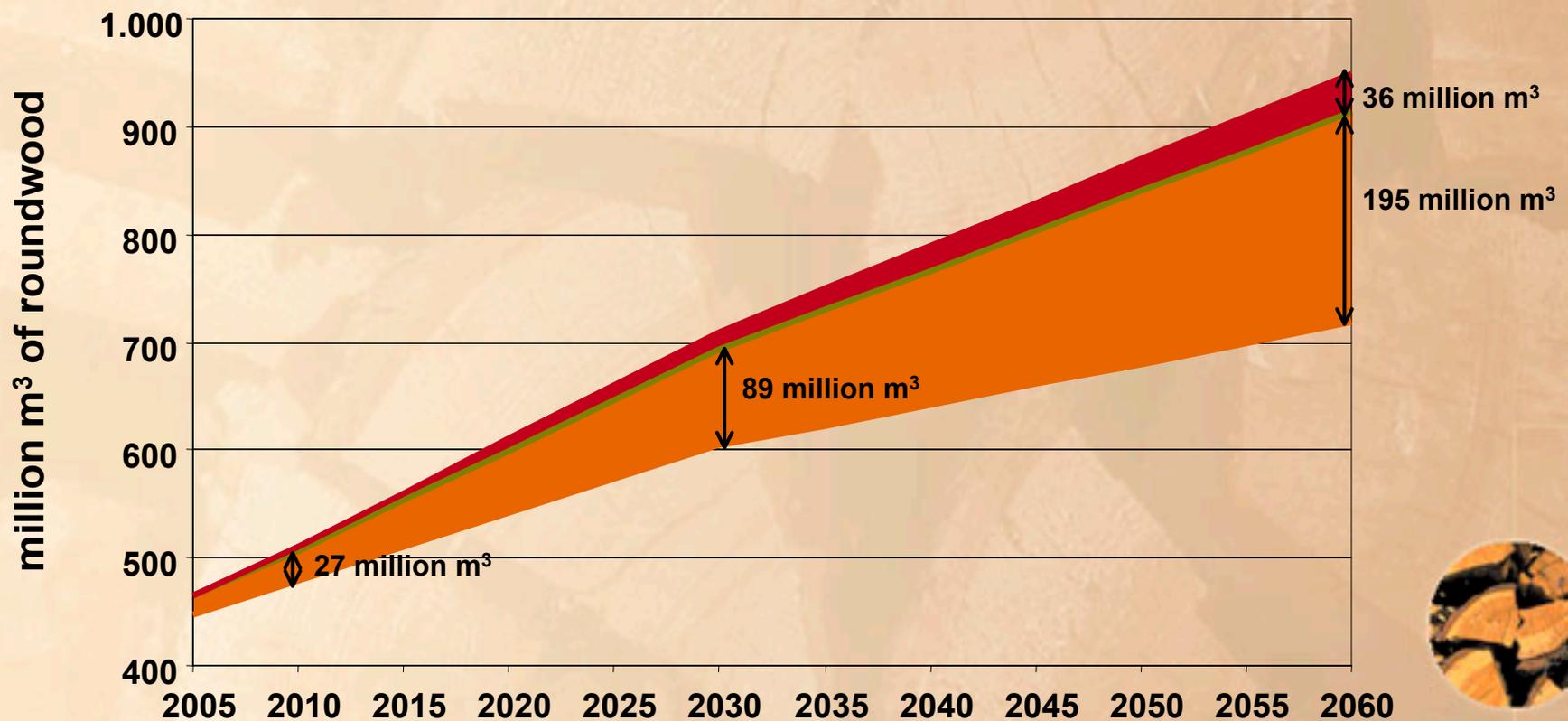
Distorted wood market



Theoretical shortfall



- Forecasted industry demand
- Shortfall under historical management
- Supply of wood under historical management
- Shortfall under new management
- Supply of wood under new management



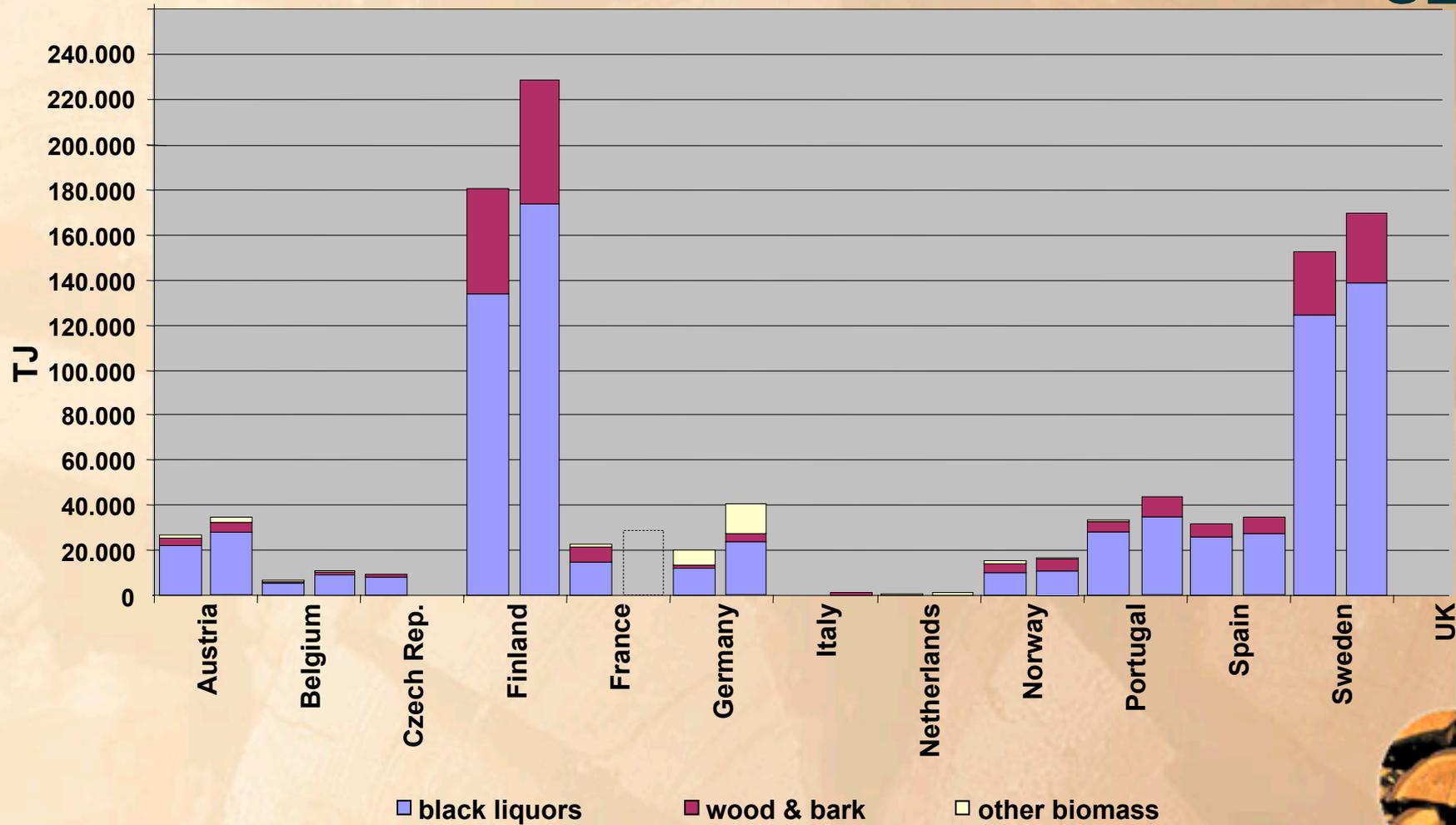
Pulp and paper industries' general objective



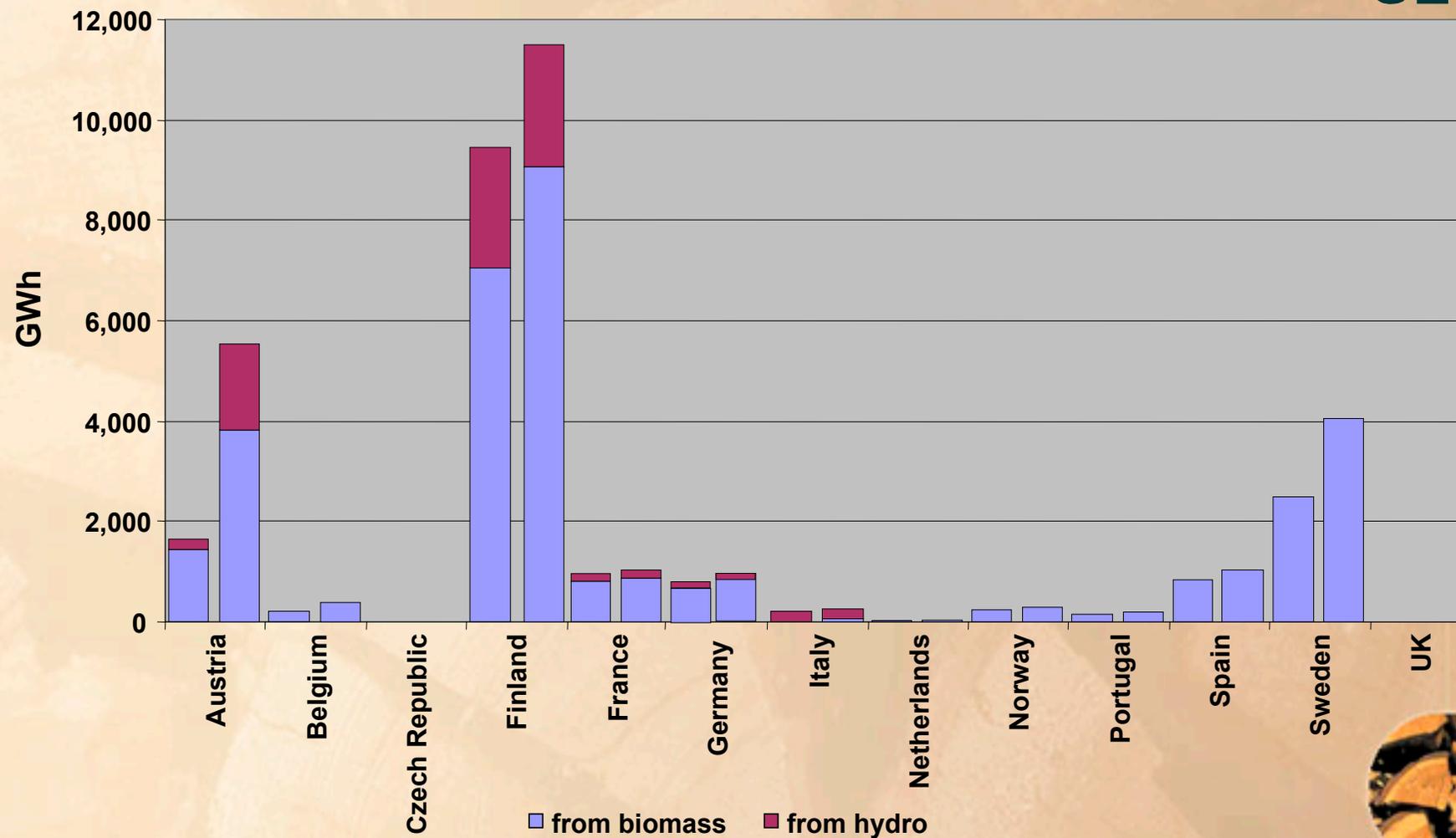
- **To maintain the sustainability of the forest ecosystem**
- **To further contribute to the RES and RES-E targets put forward by the Community**
- **Aiming for a free energy market**
- **To secure the future wood availability both in terms of quantity and quality for the EU PPI**



Energy production from biomass in the EU PPI in 2001 - 2010 (estim.)



Electricity production from RES in the EU PPI in 2001 - 2010 (Estim.)



Candidate measures leading to increasing the available biomass for energy production



- **SRF and bio-fuels from agricultural origin (CAP)**
- **increased harvesting potential (via research, mechanisation, new methods)**
- **increase felling rate**
- **extract larger quantities of forest residues (e.g. stumps, branches and tops)**
- **collect larger volumes of industry and post-consumer residues via contracts subscribed with municipal waste management organisations**
- **rely on the international trade of wood fibres**

EU should act as a facilitator

