

Argus Biomass 2018

17-19 April | Landmark hotel, London, UK
CONFERENCE | EXHIBITION | NETWORKING



PREMIUM PELLETS FOCUS DAY | 17 April

0830 Morning registration and coffee

0900 Chairperson's opening remarks

Christian Rakos, Chief Executive Officer, **proPellets Austria**

CREATING MORE CERTAINTY IN POLICY

0910 **Keynote speech: Assessing incentives in the EU to encourage market growth in the residential sector**

- Understanding the EU's ambitions for the premium pellet industry
- How to work closely with the EU to increase transparency
- What incentives are there in the heating and domestic market?
- Helping SMEs evaluate markets in Europe for new opportunities

Christian Rakos, Chief Executive Officer, **proPellets Austria**

0940 **Exploring the domestic renewable heat incentive (RHI) by 2021**

- Current and future policies and regulation in the UK premium pellet market
- How the UK vote to leave the EU will impact production, consumption and trade in the UK
- Setting legally binding carbon budgets that determine maximum emissions
- Working closely with Europe and keeping business open

Nina Skorupska, Chief Executive, **REA**

1010 Morning coffee and networking

GLOBAL SUPPLY AND DEMAND DYNAMICS OF THE PREMIUM PELLET MARKET

1040 **Panel discussion: Exploring the current supply and demand market for premium pellets**

- Where do we see growing demand for premium pellets across Europe?
- How are new regulations incentivising the domestic and commercial markets?
- Understanding the current market and expectations of new boiler installations
- What's the export potential of pellets from the US?
- How much premium pellets will be exported from the Baltics and where will they go?
- Understanding the availability of storage and shipments to support supply
- Exploring the shift from truck transport to new shipping routes and cost benefits
- How can we overcome the main logistical challenges?

Moderator:

Hugues de Cherisey, General Secretary, **SNCB**

Panellists:

Harold Arnold, President, **Fram Renewable Fuels**

John Brick, Director, **Premium Pellets**

Gilles Gauthier, General Manager, **AEBIOM**

Michael Dalton, International Commercial Manager, **Georgia Biomass**

Tiago Andrade, Director, **Wood Pellet Services**

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Gordon Murray, Executive Director, **Wood Pellet Association of Canada**

1120 **Assessing the role and competitiveness of Russia in the premium pellets market**

- Understanding raw material availability and Russia's role in the premium pellets industry
- How much new capacity is coming on stream in Russia and what are project timelines?
- Exploring the trading and supply market in Russia and Eastern Europe
- What logistical challenges do traders face and how can these be overcome?

Michael Christensen, Chief Operating Officer, **CM Biomass**

1150 **Case study: Optimising the premium pellet supply chain in Italy and improving logistics**

- Exploring the current demand for premium pellets in Italy
- Importing in bulk: what are the hurdles faced?
- Understanding the benefits of different transportation modes including train versus truck
- Assessing what infrastructure is needed to improve the efficiency of the supply chain

Filippo Valdata, Trader, **Pellet MyFire**

1220 Networking lunch

1400 **Increasing demand for boiler installations in Italy**

- Understanding the politics surrounding the premium pellets market
- Exploring new demand trends for boiler installations
- Encouraging sustainable market growth with incentives from governments

Annalisa Paniz, Director, **The Italian Association of Biomass (AIEL)**

IDENTIFYING CARBON TAX AS A DRIVER FOR PELLETS

1430 **Exploring carbon tax as a major driver for development of RES and pellets**

- Overview of the carbon market in Europe including ETS and carbon tax
- Sweden and France cases : history, way it works, effects on RES development, specificities
- Understanding how carbon tax incentives are currently driving the development of biomass

Eric Vial, President, **EPC**, General Manager, **ProPellet France**

1500 Afternoon coffee and networking

1530 **Focused roundtable discussions**

Join a table of 10-15 attendees and discuss in small groups the solutions to your number one challenge. Led by a thought-leader in the industry.

Roundtable 1: Premium pellets versus industrial pellets: How the premium pellets market works in conjunction with industrial in light industry pressures and

Led by: **Filippo Valdata**, Trader, **Pellet MyFire**

Roundtable 2: Increasing premium pellet demand: Where will it come from?

Led by: **Arnold Dale**, Vice-President, Bio-Energy, **Ekman & Co**

Roundtable 3: New boiler installations: Investing in boilers for increased efficiency

1700 Roundtable leader's conclusions

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1710 Chairperson's closing remarks

Christian Rakos, Chief Executive Officer, **proPellets Austria**

1720 Close of Premium Pellets Focus Day

1720 **Ice-breaker drinks reception:** shared with attendees of the Wood Chip, Baltics and Introductory Workshop

BALTICS FOCUS DAY | 17 April

0800 Morning registration and coffee

0930 Chairperson's opening remarks

EXPLORING BALTICS AS THE NEW GROWTH MARKET WITHIN THE GLOBAL BIOMASS INDUSTRY

0940 **Keynote panel discussion: Exploring new policies and standards to drive the biomass market**

- Exploring the benefits of biomass to stable energy prices and regional development
- Creating new energy legislation and policies in Estonia, Latvia and Lithuania
- Meeting renewable energy targets by 2030
- What local government initiatives are available including investment support?
- What support programmes are helping to establish "bio-plants"?

Panellists:

Gustav Melin, Chief Executive Officer, **SVEBIO (Swedish Bioenergy Association)**

Remigijus Lapinskas, President, **World Bioenergy Association**

1010 **Reviewing Lithuania's development in the biomass energy sector**

- Assessing Lithuania's role in creating a greener economy
- Understanding the role of biomass within the renewable industry in Lithuania
- Exploring the use of biomass in the district heating sector
- Comparing natural gas and biomass pricing

Vilma Gaubyte, Director, **LITBIOMA**

1040 Speed networking

1100 Morning refreshments and networking

ASSESSING RAW MATERIAL AVAILABILITY AND TRADING OPPORTUNITIES

1120 **Examining the availability and competitiveness of raw materials in the Baltics**

- What is the current availability of raw materials and fibres in Latvia?
- Understanding different industries competing for fibre
- Assessing the potential availability going forward
- Exploring the pellet market: what are positives and negatives?

Raul Kirjanen, Chief Executive Officer, **Graanul Invest**

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1150 LIVE POLLING:

Utilities and producer panel discussion: Exploring new trading opportunities across Europe

- What are the current levels of pellet and chip production in the Baltics?
- How much of the current and future volumes will be used domestically?
- How much of the supply will go to Scandinavia and what are the current volumes for the rest of Europe?
- Where is the growing demand for Baltics wood chips and pellets in Europe?
- What current trade flows are opening up between Russia and the Baltics?
- What consumption is coming on stream in Russia and how will this impact supply to Western Europe?

Panellists:

Arnold Dale, Vice-President, Bio-Energy, **Ekman & Co**

Morten Nielsen, Biomass Procurement Officer, **Hofor**

Michael Christensen, Chief Operating Officer, **CM Biomass**

Alexander Afanasyev, Managing Director, **PelTrade**

1220 Networking lunch

IMPROVING EFFICIENCY OF THE SUPPLY CHAIN

1350 **Panel discussion: Managing logistics and improving transport options from the Baltics**

- What should the logistics chain look like to be capable of securing new volumes?
- How can we improve sourcing reliability?
- Exploring the current infrastructure to support biomass exports from the Baltics
- What storage is available and is there a need for more investments?
- Where are new terminals being built to support infrastructure and trade?
- Understanding plans to transport biomass in larger vessels
- How should pellets be delivered, including containers?
- How economical is it to export from the Baltics?
- What could the role of inland terminals look like to improve the supply chain?

Didzis Palejs, President, **AEBIOM**, President, **LATbio**

1430 **Case study: Sourcing biomass from the Baltics and improving the supply chain**

- Exploring the current advantages of sourcing from the Baltics
- Increased consumption of biomass at plants and understanding demand
- How to improve the efficiency of the supply chain – what operations are needed?
- Understanding the infrastructure needed to improve the efficiency of the supply chain

1500 Afternoon coffee and networking

1530 **Focused roundtable discussions**

Join a table of 10-15 attendees and discuss in small groups the solutions to your number one challenge. Led by a thought leader in the industry.

Roundtable 1: Biomass demand in Scandinavia: Exploring the Scandinavian biomass market and demand for wood pellets and wood chips

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Led by: Tom Searle, Manager, Argus Consulting Services

Roundtable 2: The future of wood chip specifications: Harmonising specifications in the region

Roundtable 3: Exploring the Russian market: Trade between Russia and the Baltics

Led by: Alexander Afanasyev, Managing Director, PelTrade

1630 Roundtable leader's conclusions

1640 Chairperson's closing remarks

1650 Close of Baltics Focus Day

1700 **Ice-breaker drinks reception:** shared with attendees of the Premium Pellets, Wood Chip and Introductory Workshop

WOOD CHIP FOCUS DAY | 17 April

Exploring the economics and new consumption in the wood chip market

0730 Morning registration and coffee

Wood Chip Breakfast Briefing

0800 – 0900 **Exploring the global wood chip market**

Led by: Phyto-Charter

0900 Morning coffee and networking

0930 Chairman's opening remarks

UNDERSTANDING THE CURRENT MARKET STRUCTURE OF WOOD CHIPS

0940 **Keynote speech: Understanding the current market drivers and demand dynamics in the European wood chip market**

- Exploring the current demand drivers in the wood chip industry
- Where do we see new consumption of wood chips in Europe?
- Understanding the key challenges facing wood chip consumers
- Assessing various wood chip specifications and variations
- Where do we see new shipping routes emerging and what are the key logistical challenges?

Patrick Madigan, Head of the Board, **Móna BioEnergy**

1010 **Reviewing the changing landscape of competitive energy: the shift from pulp and paper**

- What are the current dynamics and shifts from pulp and paper?

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- Understanding the new market for timber
- How is the decrease of pulp and paper impacting pellet production?
- How will timber companies fit in the biomass and energy landscape?
- Increasing the need of transparency in the market

Seth Walker, Senior Economist, Director of Business Development, **FutureMetrics**

1040 Morning coffee and networking

1110 **Keynote panel discussion: Exploring the trading landscape of buyers and sellers**

- Understanding the main challenges from a buyer's and seller's perspective
- What does the current European wood chip trading landscape look like?
- What are the new emerging export markets?
- Market liquidity: what are the main challenges and how can these be overcome?
- Is wood chip trading done bilaterally or through an exchange?
- Understanding the position of milling plants for the wood chip market?

Moderator:

Laura Tovey-Fall, Editor, Biomass, **Argus**

Panellists:

Juan Prados Edwards, Managing Director, **Generandi**

Søren Sripathy, Senior Biomass Originator, Power Fuel Purchase, **Ørsted**

Patrick Madigan, Head of the Board, **Móna BioEnergy**

Michael Corten, Chief Executive Officer, **Bee (Belgian Eco Energy)**

1200 Networking lunch

1330 **A utilities perspective: Exploring the wood chip market, demand and pricing drivers**

- Assessing the current demand for wood chips
- Procurement decisions to source wood chips from Europe and globally
- What are the main drivers for pricing in the future?
- Looking at the supply chain and improving efficiencies

Søren Sripathy, Senior Biomass Originator, Power Fuel Purchase, **Ørsted**

ENSURING A STABLE AND SMOOTH SUPPLY CHAIN

1400 **Case study: Creating a secure supply chain for sustainable invader bush wood chips**

- Exploring how to enhance the logistics for a smooth supply chain
- Assessing storage facilities available for wood chips
- Improving the handling of biomass at Ports for increased efficiencies
- Arranging shipments into European Ports and handling

Michael Corten, Chief Executive Officer, **Bee (Belgian Eco Energy)**

1430 Afternoon coffee and networking

1500 **Focused roundtable discussions**

Join a table of 15-20 attendees and discuss in small groups the solutions to your number one challenge. Led by a thought-leader in the industry.

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Roundtable 1: Exploring wood chip technologies for co-generation: Generating electricity, whilst producing heat for the system and for pellet production and other loads

Enrico Meneghetti, Chief Executive Officer, **Espe**

Roundtable 2: How to deal with project financing: Complying and meeting bank demands

Roundtable 3: Wood chip quality in the Baltics: Exploring competition for certain quality of wood chips

Led by: **Didzis Palejs**, President, **AEBIOM**, President, **LATbio**

Roundtable 4: Exploring the timber industry: Assessing competitiveness and market trends

1600 Roundtable leader's conclusions

1620 Chairperson's closing remarks

1650 Close of Wood Chip Focus Day

1700 **Ice-breaker drinks reception:** shared with attendees of the Premium Pellets, Baltics and Introductory Workshop

Introductory Workshop

0900 – 16.30

An introduction to the wood pellet business

The areas of the sector covered by the interactive workshop:

- Solid biomass, the very basics
- The fundamentals and economics of biomass trade
- Logistics and supply chain economics

Michael Wild, Managing Partner, **Wild & Partner**

- Typical customer expectation

Yves Ryckmans, Chief Technology Officer, Biomass, **ENGIE Lab Laborelec**

- The regulatory landscape and commercial implications on industry
- Sustainability: Key criteria and certification schemes

Gordon Murray, Executive Director, **Wood Pellet Association of Canada**

Yves Ryckmans, Chief Technology Officer, Biomass, **ENGIE Lab Laborelec**

- Quality assurance and quality issues

Martin Englisch, Managing Director, **BEA Institut fur Bioenergie**

- Overview of how the industrial and residential markets interact and new trends
- New technical developments and the economics of biomass processing

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Gernot Stadlober, Managing Director, **Stadlober GmbH**

- Exploring forecasts, price volatility and consumer purchasing behaviours

Jean-Michel Sylvestre, Chief Executive Officer, **Charmont Investments**

There will be ample room to discuss your individual questions and projects or initiatives.

Who is this workshop for:

This workshop is designed for new industry professionals in the biomass market, looking to advance their knowledge on the fundamentals and economics of the biomass industry. Those in attendance will gain a thorough understanding of the current trading landscape, new policies, risk management techniques, efficiencies across the supply chain and examination of sustainability requirements.

Led by:

Michael Wild, Managing Partner, **Wild & Partner**

With contributions by:

Jean-Michel Sylvestre, Chief Executive Officer, **Charmont Investments**

Yves Ryckmans, Chief Technology Officer, Biomass, **ENGIE Lab Laborelec**

Martin Englisch, Managing Director, **BEA Institut für Bioenergie**

Gernot Stadlober, Managing Director, **Stadlober GmbH**

Gordon Murray, Executive Director, **Wood Pellet Association of Canada**

MAIN CONFERENCE | 18 April **Conference Day One**

0800 Morning registration and coffee

0930 Chairman's opening remarks
Freddie Staermose, Business Development, **Argus**

REVIEWING THE CURRENT PELLET BALANCE GLOBALLY

0940 **Exploring the changing global supply and demand dynamics of industrial pellets**

- Assessing the key drivers of pellet consumption in Europe – what's driving demand?
- Understanding the supply landscape from the US and its future role as the main exporter
- Exploring changing logistics and opening up new trading routes
- When do we expect Asia's industrial pellet capacity to come on stream?
- The future: what opportunities lie ahead for alternative renewable commodities from biomass?

Laura Tovey-Fall, Editor, Biomass, **Argus**

1010 Morning coffee and networking

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1040 LIVE POLLING:

Utility panel discussion: Exploring new consumption and capacity and key market challenges for utilities

- How is current and future policy driving new consumption?
- Where do we see current investments?
- How will biomass compete with falling renewable costs and subsidies?
- What new consumption do we see from mid to large biomass companies in Japan?
- Will companies with reduced capacity increase it in the coming months?
- What is the effect of a lack of demand on liquidity on utility companies?
- What is the demand for imports of palm kernel shells (PKS) and wood chips?
- What are the procurement decisions for new sourcing and supply?
- How will SBP implementation affect timelines for demand growth?
- What quality checks need to be in place to meet requirements?

Moderator:

Seth Ginther, Executive Director, **USIPA**

Panellists:

Henry Pease, Biomass Trader, **RWE Supply & Trading**

Deborah Keedy, Head of Biomass, **Drax**

Fabien Mehu, Head of Biomass Trading, **Engie**

Søren Alsing, Head of Fuel, **Ørsted**

Christian Joore, Lead Trader, **Vattenfall**

Marco Kim, General Manager, Bio Power Business Division, **Hanyang Corporation**

PELLET PRICING AND TRADING

1130 **Panel discussion: Overcoming market price risk in an uncertain biomass market**

- Why can companies access the market tomorrow?
- Improving transparency in pricing to help mitigate price risk
- Harmonisation of contracts for trading biomass cargoes: to what extent will this work?
- How can the industry move towards a central contract for trading?
- What can companies do if prices remain at the spot price?
- Understanding the concept of financial swap contracts and the market

Moderator:

Freddie Staermose, Business Development, **Argus**

Panellists:

Robert Seehawer, Business Development, **EEX**

Francois Megret, Biomass Broker, **Tradition Green**

Bertrand Meyer, Prime Solutions and Financing Derivatives Execution and Clearing Deputy
Global Head Corporate Sales, **BNP Paribas**

Ralf Dickgreber, Head of Bulk and Freight Trading, **Engie**

1200 **How the physical market is connected to the financially settled futures which EEX is offering**

- How does futures work – how is price determined at the exchange?
- Understanding how futures work in terms of hedging
- Assessing how physical trading is linked to the financially settled futures

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- How to set up a benchmark with price transparency
Robert Seehawer, Business Development, **EEX**

1230 Networking lunch

IMPROVING THE SUPPLY CHAIN AND MANAGING SHIPPING AND LOGISTICS

1400 Assessing the outlook on freight rates and the shipping landscape

- Understanding current and future costs for transportation of biomass
- Where are freight rates going?
- Exploring global freight rate and chartering trends to de-risk global activity
- Looking at different routes to customers

Marc Pauchet, Lead Dry Analyst, **Maersk Broker**

NATIONAL POLICIES AND SUSTAINABILITY

1430 Reviewing the winter package and EU strategy to reach targets

- An update on current proposals and draft for the EU renewables directive
- Exploring the role of wood pellets in renewable energy
- Assessing targets to 2030 and the industry's contribution to cleaner energy
- How will the EU directive impact the UK due to Brexit?
- Identifying biomass development across Europe, current use and forecasts of future perspectives

Giulio Volpi, DG Energy, Unit Renewables and Carbon Capture and Storage Policy,
European Commission

1520 Afternoon coffee and networking

1550 Creating a sustainable long term future in Asia and trend towards renewables

- Identifying the availability of biomass feedstock and future competition of biomass
- Creating a new business model using a combination of solar, wind and biomass
- How are companies revamping their businesses to invest in co-generation
- Understanding new government incentives to drive renewable energy across Asia
- Exploring the new rise in demand from China: what are the new opportunities?
- Reviewing updates on the Feed-in-Tariff (FIT) scheme in Japan

Timothy Ong, Senior Vice President-Strategic Impact Projects, **Agensi Inovasi Malaysia (AIM)**, Presidents Department

1610 Exploring the SBP certification system

- How many certificates have been issued to date?
- Where are the current and future geo markets?
- What are the volumes of SBP certified material?
- Establishing an IT platform: The SBP data transfer system 1.0
- Working collaboratively with stakeholders: SBP's Governance Transition Process

Carsten Huljus, Chief Executive Officer, **SBP**

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1640 **Keynote government panel discussion: Assessing national strategies to boost biomass development**

- How will the EU directive or proposal impact the UK trading market?
- What options are there for countries to align market specifications?
- How will new sustainability standards in the Netherlands move the biomass industry forward?
- What is the future of co-generation and utilisation of waste for heat energy?
- Integration between regions: how will this work?
- What are the updates on the Feed-in-Tariff (FIT) scheme?
- What are the next steps for South Korea's renewable portfolio standard (RPS)?

Panellists:

Giulio Volpi, DG Energy, Unit Renewables and Carbon Capture and Storage Policy, **European Commission**

Pharoah Le Feuvre, Renewable Energy Division, **International Energy Agency (IEA)**

Mark Elless, Technology Manager, Bioenergy Technologies Office, **Department of Energy, USA**

1720 Chairman's closing remarks

1730 Close of conference Day One

1730 Networking drinks reception

MAIN CONFERENCE | 19 April Conference Day Two

0830 Morning refreshments and networking

0930 Chairman's opening speech

Freddie Staermose, Business Development, **Argus**

GAINING COMPETITIVENESS IN THE BIOMASS MARKET

0940 **Keynote address: Biomass conversion and a competitive wood pellet market in the energy mix**

- Our new Name and vision - transformation from DONG Energy to Ørsted
- Identifying key EU trends in renewables and bioenergy
- Ørsted's strategy for biomass conversions and future bio-energy activities (alternative biomass, biogas, REnescience)
- SBP – the market standard for ensuring sustainable biomass
- How will the wood pellet market mature further with regards to supply and demand, quality, liquidity, certification and sustainability?

Thomas Dalsgaard, Executive Vice President, **Ørsted**

BIOMASS DEVELOPMENTS IN ASIA

1010 **Building sustainable partnerships in the Asia market**

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- Navigating the current industrial pellet global market and opportunities in Asia
- How new demand will require new production capacity
- Delivering quality pellets and working closely to explore specifications and criteria to meet **Thomas Meth**, Co-Founder and Executive Vice President of Sales & Marketing, **Enviva**

1040 **Examining the effect of subsidy standards in Japan and South Korea on biomass demand**

- Exploring supports schemes in Asia and growing consumption of pellets, PKS and wood chips
- What is the expected demand for biomass based on new support schemes?
- Understanding any potential risks or shortfalls with subsidy schemes
- How is Japan evolving in terms of sustainability criteria?

Bill Strauss, President, **FutureMetrics**

1110 Morning coffee and networking

1140 **Panel discussion: Exploring new developments in the Asia market and trade opportunities**

This panel will assess current demand in Malaysia, South Korea, Japan, China, India, Vietnam and Indonesia

- Meeting Japan's demand for wood pellets: exploring new trade flows
- What is the demand for imports of palm kernel shells (PKS) and woodchips?
- Understanding the current trends and where the market is heading
- Assessing mid-scale heat demand to identify supply changes
- Identifying growth in waste treatment processes
- Looking at the current export market in Asia-Pacific

Moderator:

Evgeniy Son, Fuel Trader, **Apeiron Agrocommodities**

Panellists:

Ted Kim, Vice President, **Samsung**

Gordon Murray, Executive Director, **Wood Pellet Association of Canada**

Brodie Govan, Biomass Broker, **Voyage Power**

1210 **Japan case study: Increasing renewable energy supply with plant upgrades**

- Updates on the conversion of biomass plants in South Korea and timelines
- Exploring fuel handling upgrades to convert a combination of pellets, wood chips and PKS
- Reducing overall costs and improving operational efficiency
- Converting to a power plant fuelled entirely by biomass

Yoshinobu Kusano, Senior Advisor, **Renova**

1240 Networking lunch

EXPLORING THE RENEWABLE HEAT INCENTIVE FOR BOILERS

1340 **Incentives for commercial and domestic boilers and regulatory changes**

- Current policies and regulation in the UK biomass market
- Understanding new policy updates on the RHI scheme
- Assessing various biomass feedstock: how are companies fuelling their boilers?
- Exploring the different requirements for waste wood, emission certificates and sustainability

Luke Bailey, Senior Policy Manager, Non-Domestic RHI, **Ofgem**

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NEW TECHNOLOGICAL ADVANCEMENTS

1410 **Torrefaction's contribution to a more sustainable biomass industry: Homogenisation, bio-coal and bio-char**

- Torrefaction technologies
- Its' applications and role in the contribution to a more sustainable biomass industry
- Current status and future recommendations regarding further R&D

Erik Huis, CEO, **CEG B.V.**

1440 **Producing high energy black pellets from waste feedstock**

- Understanding the current feedstock landscape in Russia
- Creating high energy products that are cost effective and stable
- Exploring the benefits of black pellet technology
- Adding sustainability to the entire biomass supply chain

Andrew Belousov, Head of Sales and Marketing Department, **Bionet**

1510 **Processing advanced black pellets based on new technological developments** **Reserved for Arbaflame**

1550 **Chairman's closing remarks**

Freddie Staermose, Business Development, **Argus**

1600 **Afternoon coffee and networking**

1630 **Close of conference**