



POLISH
PELLET
COUNCIL

POLISH PELLET COUNCIL

WHOLE PELLET INDUSTRY TOGETHER

Adam Sarnaszek

Polish Pellet Council

organiza

Valladolid • 25 de septiembre • 2019

colaboran



Conferencia internacional
Mercado del Pellet doméstico



EUROPEAN PELLET
COUNCIL
A NETWORK OF
BIENERGY EUROPE

Bienergy
EUROPE



POLSKA
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HOME WŁADZE STATUT ZOSTAŃ CZŁONKIEM O PELLECCIE ZAKRES DZIAŁALNOŚCI WSPÓŁPRACA

CAŁA BRANŻA PELETU RAZEM




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November 14, 2017

New Members



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The **Polish Pellet Council** is an association of the Polish pellet industry which was founded on 2 June 2017. Members of the Polish Pellet Council are companies that produce, trade and distribute wood pellets, producers of pellet heating equipment, fireplace furnace manufacturers, installers, manufacturers of pelletizing technologies, but also other businesses, institutions, certification bodies, and organizations active in the industry pellet and engaged in the development of this industry sector.

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Officially from 12 September 2019
the Polish Pellet Council has obtained the
ENplus[®] National Promoting Association (NPA) statute.

This means that we have become the main national
representative of the ENplus[®] quality certificate in
Poland.



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Till September 2019 we recorded an increase in the numbers of certified entities to:

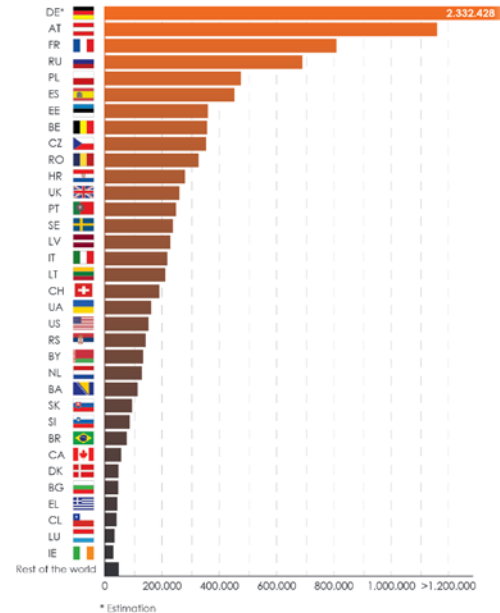
- 45 producers
- 13 traders

5th position worldwide in certified pellet production

And we are still working hard to enhance this result!!



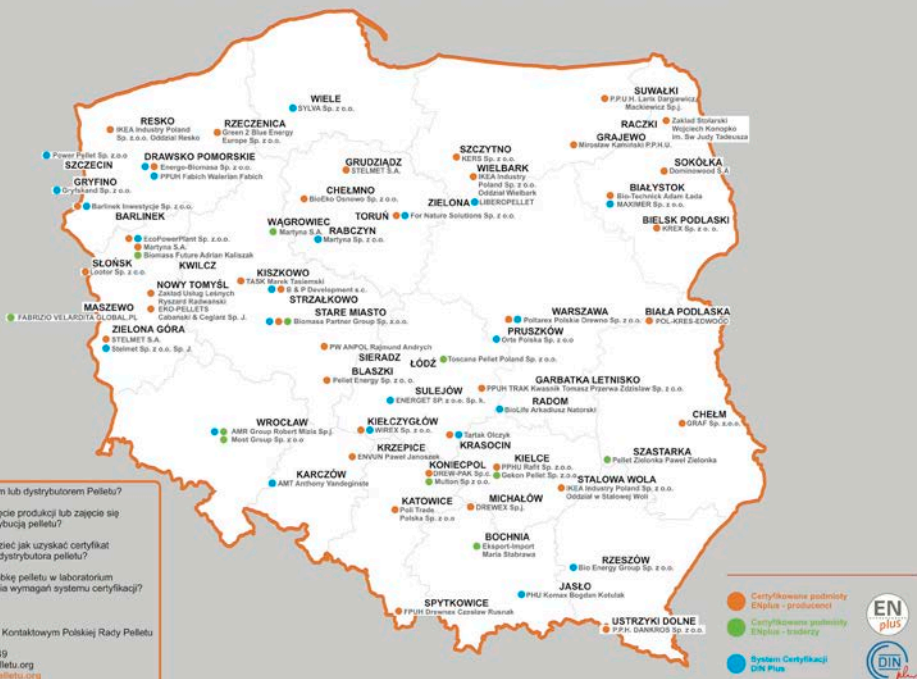
Volumes of ENplus® certified pellets produced per country (2018, tonnes)
Source: ENplus®





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MAPA CERTYFIKOWANEGO PELLETU DRZEWNEGO



Mapa opracowana na podstawie danych z dnia 31.07.2015. Wszelkie aktualizacje będą niedostępne dla subskrybentów naszej strony www.polskaradapelletu.org

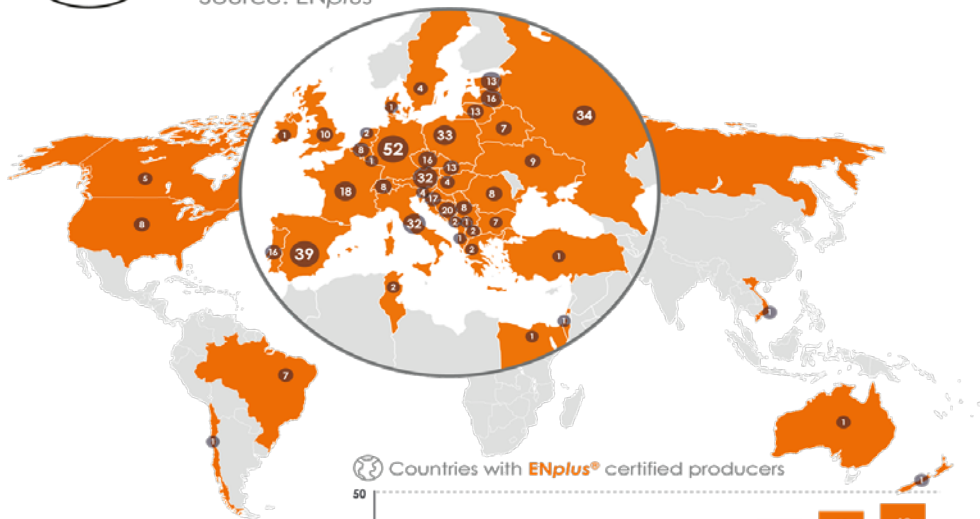
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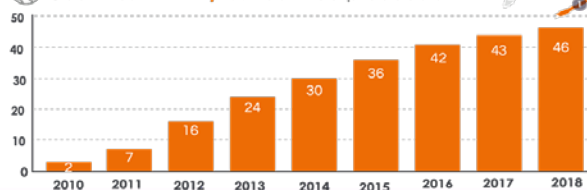
Worldwide ENplus® certified pellet production plants

(In 2018)

Source: ENplus®



Countries with ENplus® certified producers



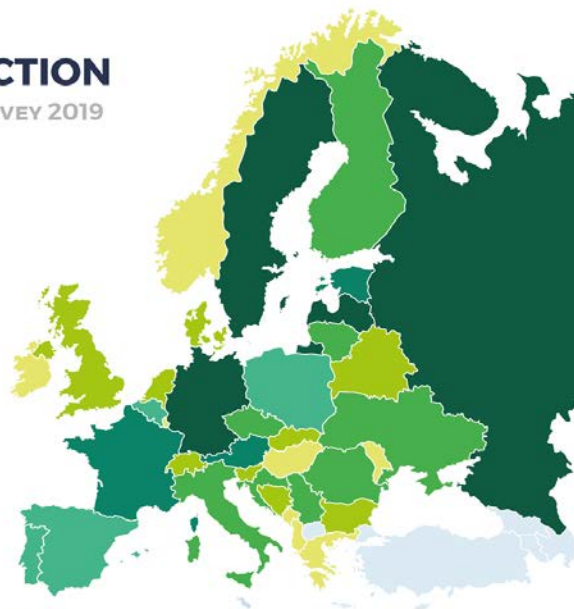
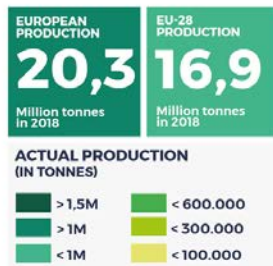
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EUROPEAN/EU-28 WOOD PELLET PRODUCTION

(IN 2018, TONNES, %) SOURCE: EPC SURVEY 2019



PRODUCTION IN TOP 5 EUROPEAN COUNTRIES IN 2018



BIOENERGY EUROPE
STATISTICAL
REPORT



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- Overall pellet production **1,2 Mio** (2018)
- Certified pellet production (A1 class mostly) **0,6 Mio** (2018)

Forecast for 2019

- Overall pellet production **1,5 Mio** (2019)
- Certified pellet production **0,8 Mio** (2019)

- Aprox. 10 new producers where certification is in progress

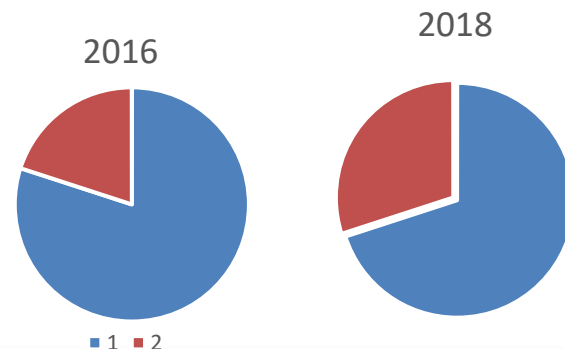


Main markets 2018:

- 30 % - internal market
 - mainly domestic heating - boilers
 - some midle size instalations - growing market
 - power plants – only 2 PP using wood pellet (aprox. 300 k Mg/year)
 - 7 power plants using sunflower husk pellet – aprox 1 Mio Mg (import from Ukraine)

70 % - export to UE main countries:

- Italy
- Germany
- Austria
- Denmark





- Country production is growing – two digit grow
- Pellet prices in PL are still cheaper compare to DE, DK, IT, AT aprox. 170 EUR netto (FCA)
 - Export is still stable
- Comercial pellet price – 230 EUR gross (23 % VAT incudet)
- Expected growing internal market due to GOV programmes – replaicing old boilers

- Country "SMOG STOP" Programme
- TARGET → replacing 3 Mio old coal boilers till 2025
- Current realization (Sept 2019) 0,2 Mio
- Ecological Organizations claiming very poor performance of target

- **Main 3 technologies recomended in GV Stop Smog Programme:**
Heat pumps, PV for heating, solid fuels – wood pellet

1

2

The purposes of the Association are:

- **Permanent communication between wood pellet manufacturers - and heating devices producers**, so that they meet each others legal requirements, quality requirements and meet the expectations and needs of consumers.
- **Participation in the creation of legal acts** regarding the quality of solid fuels and the use of class 5 boilers.
- **Communication with the public and the media** about the benefits of wood pellets, promoting pellet boilers and low-emmission fuels.
- **Educating and raising awareness and knowledge the local authorities and legislators** aware of the use of pellet boilers, the use of wood pellets, the quality of solid fuels and problems related to air pollution.



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