

A sustainable bioenergy policy for the period after 2020

Fields marked with * are mandatory.

Introduction

EU Member States have agreed on a new policy framework for climate and energy, including EU-wide targets for the period between 2020 and 2030. The targets include reducing the Union's greenhouse gas (GHG) emissions by 40 % relative to emissions in 2005 and ensuring that at least 27 % of the EU's energy comes from renewable sources. They should help to make the EU's energy system more competitive, secure and sustainable, and help it meet its long-term (2050) GHG reductions target.

In January 2014, in its Communication on A policy framework for climate and energy in the period from 2020 to 2030,[1] the Commission stated that '[a]n improved biomass policy will also be necessary to maximise the resource-efficient use of biomass in order to deliver robust and verifiable greenhouse gas savings and to allow for fair competition between the various uses of biomass resources in the construction sector, paper and pulp industries and biochemical and energy production. This should also encompass the sustainable use of land, the sustainable management of forests in line with the EU's forest strategy and address indirect land-use effects as with biofuels'.

In 2015, in its Energy Union strategy,[2] the Commission announced that it would come forward with an updated bioenergy sustainability policy, as part of a renewable energy package for the period after 2020.

Bioenergy is the form of renewable energy used most in the EU and it is expected to continue to make up a significant part of the overall energy mix in the future. On the other hand, concerns have been raised about the sustainability impacts and competition for resources stemming from the increasing reliance on bioenergy production and use.

Currently, the Renewable Energy Directive[3] and the Fuel Quality Directive[4] provide an EU-level sustainability framework for biofuels[5] and bioliquids.[6] This includes harmonised sustainability criteria for biofuels and provisions aimed at limiting indirect land-use change,[7] which were introduced in 2015.[8]

In 2010, the Commission issued a Recommendation[9] that included non-binding sustainability criteria for solid and gaseous biomass used for electricity, heating and cooling (applicable to installations with a capacity of over 1 MW). Sustainability schemes have also been developed in a number of Member States.

The Commission is now reviewing the sustainability of all bioenergy sources and final uses for the period after 2020. Identified sustainability risks under examination include lifecycle greenhouse gas emissions from bioenergy production and use; impacts on the carbon stock of forests and other ecosystems; impacts on biodiversity, soil and water, and emissions to the air; indirect land use change impacts; as well as impacts on the competition for the use of biomass between different sectors (energy, industrial uses, food). The Commission has carried out a number of studies to examine these issues more in detail.

The development of bioenergy also needs to be seen in the wider context of a number of priorities for the Energy Union, including the ambition for the Union to become the world leader in renewable energy, to lead the fight against global warming, to ensure security of supply and integrated and efficient energy markets, as well as broader EU objectives such as reinforcing Europe's industrial base, stimulating research and innovation and promoting competitiveness and job creation, including in rural areas. The Commission also stated in its 2015 Communication on the circular economy^[10] that it will 'promote synergies with the circular economy when examining the sustainability of bioenergy under the Energy Union'. Finally, the EU and its Member States have committed themselves to meeting the 2030 Sustainable Development Goals.

[1] COM(2014) 15.

[2] COM/2015/080 final.

[3] Directive 2009/28/EC of the European Parliament and of the Council of 23 April 2009 on the promotion of the use of energy from renewable sources and amending and subsequently repealing Directives 2001/77/EC and 2003/30/EC (OJ L 140, 5.6.2009, p. 16).

[4] Directive 98/70/EC of the European Parliament and of the Council of 13 October 1998 relating to the quality of petrol and diesel fuels and amending Council Directive 93/12/EEC (OJ L 350, 28.12.1998, p. 58).

[5] Used for transport.

[6] Used for electricity, heating and cooling.

[7] Biomass production can take place on land that was previously used for other forms of agricultural production, such as growing food or feed. Since such production is still necessary, it may be (partly) displaced to land not previously used for crops, e.g. grassland and forests. This process is known as indirect land use change (ILUC); see <http://ec.europa.eu/energy/en/topics/renewable-energy/biofuels/land-use-change>.

[8] See more details on the existing sustainability framework for biofuels and bioliquids in section 5.

[9] COM/2010/0011 final.

[10] Closing the loop – an EU action plan for the circular economy (COM(2015) 614/2).

1. General information about respondents

* 1.1. In what capacity are you completing this questionnaire?

- academic/research institution
- as an individual / private person
- civil society organisation
-

- international organisation
- other
- private enterprise
- professional organisation
- public authority
- public enterprise

* 1.4. If you are a professional organisation, which sector(s) does your organisation represent?

- Agriculture
- Automotive
- Biotechnology
- Chemicals
- Energy
- Food
- Forestry
- Furniture
- Mechanical Engineering
- Other
- Printing
- Pulp and Paper
- Woodworking

1.5. If you are a professional organisation, where are your member companies located?

- Austria
- Belgium
- Bulgaria
- Croatia
- Cyprus
- Czech Republic
- Denmark
- Estonia
- Finland
- France
- Germany
- Greece
- Hungary
- Ireland
- Italy
- Latvia
- Lithuania
- Luxembourg
- Malta
- Netherlands
- Poland
- Portugal

- Romania
- Slovakia
- Slovenia
- Spain
- Sweden
- United Kingdom
- non-EU country(ies)

1.8. If replying as an individual/private person, please give your name; otherwise give the name of your organisation

200 character(s) maximum

Composite Panel Association

1.9. If your organisation is registered in the Transparency Register, please give your Register ID number.

(If your organisation/institution responds without being registered, the Commission will consider its input as that of an individual and will publish it as such.)

200 character(s) maximum

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1.10. Please give your country of residence/establishment

- Austria
- Belgium
- Bulgaria
- Croatia
- Cyprus
- Czech Republic
- Denmark
- Estonia
- Finland
- France
- Germany
- Greece
- Hungary
- Ireland
- Italy
- Latvia
- Lithuania
- Luxembourg
- Malta
- Netherlands
- Poland

- Portugal
- Romania
- Slovakia
- Slovenia
- Spain
- Sweden
- United Kingdom
- Other non-EU European country
- Other non-EU Asian country
- Other non-EU African country
- Other non-EU American country

* 1.11. Please indicate your preference for the publication of your response on the Commission's website:

(Please note that regardless the option chosen, your contribution may be subject to a request for access to documents under [Regulation 1049/2001](#) on public access to European Parliament, Council and Commission documents. In this case the request will be assessed against the conditions set out in the Regulation and in accordance with applicable [data protection rules](#).)

- Under the name given: I consent to publication of all information in my contribution and I declare that none of it is subject to copyright restrictions that prevent publication.
- Anonymously: I consent to publication of all information in my contribution and I declare that none of it is subject to copyright restrictions that prevent publication.
- Please keep my contribution confidential. (it will not be published, but will be used internally within the Commission)

Perceptions of bioenergy

2.1. Role of bioenergy in the achievement of EU 2030 climate and energy objectives

Please indicate which of the statements below best corresponds to your perception of the role of bioenergy in the renewable energy mix, in particular in view of the EU's 2030 climate and energy objectives:

- Bioenergy should continue to play a dominant role in the renewable energy mix.
- Bioenergy should continue to play an important role in the renewable energy mix, but the share of other renewable energy sources (such as solar, wind, hydro and geothermal) should increase significantly.
- Bioenergy should not play an important role in the renewable energy mix: other renewable energy sources should become dominant.

2.2. Perception of different types of bioenergy

Please indicate, for each type of bioenergy described below, which statement best corresponds to your perception of the need for public (EU, national, regional) policy intervention (tick one option in each line):

| | Should be further promoted | Should be further promoted, but within limits | Should be neither promoted nor discouraged | Should be discouraged | No opinion |
|--|----------------------------|---|--|-----------------------|----------------------------------|
| Biofuels from food crops | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Biofuels from energy crops (grass, short rotation coppice, etc.) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Biofuels from waste (municipal solid waste, wood waste) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Biofuels from agricultural and forest residues | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Biofuels from algae | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Biogas from manure | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Biogas from food crops (e.g. maize) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Biogas from waste, sewage sludge, etc. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Heat and power from forest biomass (except forest residues) | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Heat and power from forest residues (tree tops, branches, etc.) | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| | | | | | |

| | | | | | |
|---|-----------------------|-----------------------|----------------------------------|----------------------------------|----------------------------------|
| Heat and power from agricultural biomass (energy crops, short rotation coppice) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Heat and power from industrial residues (such as sawdust or black liquor) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> |
| Heat and power from waste | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Large-scale electricity generation (50 MW or more) from solid biomass | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Commercial heat generation from solid biomass | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Large-scale combined heat and power generation from solid biomass | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Small-scale combined heat and power generation from solid biomass | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Heat generation from biomass in domestic (household) installations | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Bioenergy based on locally sourced feedstocks | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |

| | | | | | |
|--|-----------------------|-----------------------|----------------------------------|-----------------------|-----------------------|
| Bioenergy based on feedstocks sourced in the EU | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Bioenergy based on feedstocks imported from non-EU countries | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Other | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

3. Benefits and opportunities from bioenergy

3.1. Benefits and opportunities from bioenergy

Bioenergy (biofuel for transport, biomass and biogas for heat and power) is currently promoted as it is considered to be contributing to the EU's renewable energy and climate objectives, and also having other potential benefits to the EU economy and society.

Please rate the contribution of bioenergy, as you see it, to the benefits listed below (one answer per line):

| | of critical importance | important | neutral | negative | No opinion |
|---|------------------------|----------------------------------|-----------------------|-----------------------|----------------------------------|
| Europe's energy security: safe, secure and affordable energy for European citizens | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Grid balancing including through storage of biomass (in an electricity system with a high proportion of electricity from intermittent renewables) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Reduction of GHG emissions | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Environmental benefits (including biodiversity) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Resource efficiency and waste management | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Boosting research and innovation in bio-based industries | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| | | | | | |

| | | | | | |
|---|-----------------------|-----------------------|-----------------------|-----------------------|----------------------------------|
| Competitiveness of European industry | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Growth and jobs, including in rural areas | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Sustainable development in developing countries | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Other | <input type="radio"/> |

3.2. Any additional views on the benefits and opportunities from bioenergy? Please explain

2500 character(s) maximum

4. Risks from bioenergy production and use

4.1. Identification of risks

A number of risks have been identified (e.g. by certain scientists, stakeholders and studies) in relation to bioenergy production and use. These may concern specific biomass resources (agriculture, forest, waste), their origin (sourced in the EU or imported) or their end-uses (heat, electricity, transport).

Please rate the relevance of each of these risks as you see it (one answer per line):

| | critical | significant | not very significant | non-existent | No opinion |
|--|-----------------------|-----------------------|-----------------------|-----------------------|----------------------------------|
| Change in carbon stock due to deforestation and other direct land-use change in the EU | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Change in carbon stock due to deforestation and other direct land-use change in non-EU countries | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Indirect land-use change impacts | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| GHG emissions from the supply chain (e.g. cultivation, processing and transport) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |

| | | | | | |
|---|----------------------------------|-----------------------|-----------------------|-----------------------|----------------------------------|
| GHG emissions from combustion of biomass ('biogenic emissions') | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Impacts on air quality | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Impacts on water and soil | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Impacts on biodiversity | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Varying degrees of efficiency of biomass conversion to energy | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Competition between different uses of biomass (energy, food, industrial uses) due to limited availability of land and feedstocks and/or subsidies for specific uses | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Internal market impact of divergent national sustainability schemes | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Other | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

4.2. Any additional views on the risks from bioenergy production and use? Please explain

2500 character(s) maximum

Mandates and subsidies that support biomass energy in the EU will drive demand for limited wood product manufacturer residual materials (e.g., sawdust, shavings, secondary woodchips) in the U.S. and Canada away from the production of composite wood products to production of pellets for energy use, which poses a number of negative consequences discussed in this survey.

A recent study by the U.S. Forest Service that assessed the potential market impacts of European pellet demand on wood baskets in the U.S. Coastal South made several links between EU Member State subsidies and dramatic increases in U.S. wood pellet exports. (See Effect of Policies on Pellet Production and Forests in the U.S. South," U.S. Forest Service, December 2014.) In another study by consulting firm RISI, subsidized coal-to-biomass conversions have grown the UK wood pellet market alone from 200,000 metric tons (mt) in 2010 to 4.2 million mt in 2014, with 60% of total volume coming from the United States. Demand was projected to increase in 2015 to 6.0 million metric tons, with the trend expected to accelerate as EU Member States seek to meet their 20% renewable energy mandate by 2020.

The UK biomass subsidies have fundamentally changed the ability of pellet producers in the southern U.S. to pay higher prices for biomass feedstocks. Under the new UK Contracts for different subsidy scheme, pellet producers can pay about 5 times the market price for pulpwood stumpage alone. Without a subsidy, UK utilities would lose money if they used pellets as a fuel source to generate electricity, to the tune of about \$26 per short ton of stumpage even before the cost of the wood is factored in. (See “An Analysis of UK Biomass Power Policy, US South Pellet Production and Impacts on Wood Fiber Markets,” RISI, 2015.)

Although the RISI study does not directly address impacts on residuals from lumber, plywood and other wood products, it is highly likely that EU Member State subsidies pose a high risk of distorting these fiber markets in the U.S. South and Eastern Canada. These market distortions will no doubt exacerbate the challenges posed to the composite panel industry by increased competition between pellet manufacturers and our members for limited and finite wood product manufacturer residual materials and by the increased demand for our products as natural demand for housing increases from “Great Recession” lows.

5. Effectiveness of existing EU sustainability scheme for biofuels and bioliquids

In 2009, the EU established a set of sustainability criteria for biofuels (used in transport) and bioliquids (used for electricity and heating). Only biofuels and bioliquids that comply with the criteria can receive government support or count towards national renewable energy targets. The main criteria are as follows:

- Biofuels produced in new installations must achieve GHG savings of at least 60 % in comparison with fossil fuels. In the case of installations that were in operation before 5 October 2015, biofuels must achieve a GHG emissions saving of at least 35 % until 31 December 2017 and at least 50 % from 1 January 2018. Lifecycle emissions taken into account when calculating GHG savings from biofuels include emissions from cultivation, processing, transport and direct land-use change;
- Biofuels cannot be grown in areas converted from land with previously (before 2008) high carbon stock, such as wetlands or forests;
- Biofuels cannot be produced from raw materials obtained from land with high biodiversity, such as primary forests or highly biodiverse grasslands.

In 2015, new rules^[1] came into force that amend the EU legislation on biofuel sustainability (i.e. the Renewable Energy Directive and the Fuel Quality Directive) with a view to reducing the risk of indirect land-use change, preparing the transition to advanced biofuels and supporting renewable electricity in transport. The amendments:

- limit to 7 % the proportion of biofuels from food crops that can be counted towards the 2020 renewable energy targets;
- set an indicative 0.5 % target for advanced biofuels as a reference for national targets to be set by EU countries in 2017;

- maintain the double-counting of advanced biofuels towards the 2020 target of 10 % renewable energy in transport and lay down a harmonised EU list of eligible feedstocks; and
- introduce stronger incentives for the use of renewable electricity in transport (by counting it more towards the 2020 target of 10 % renewable energy use in transport).

[1] Directive (EU) 2015/1513 of the European Parliament and of the Council of 9 September 2015 amending Directive 98/70/EC relating to the quality of petrol and diesel fuels and amending Directive 2009/28/EC on the promotion of the use of energy from renewable sources (OJ L 239, 15.9.2015, p. 1).

5.1. Effectiveness in addressing sustainability risks of biofuels and bioliquids

In your view, how effective has the existing EU sustainability scheme for biofuels and bioliquids been in addressing the risks listed below? (one answer per line)

| | effective | partly effective | neutral | counter-productive | No opinion |
|--|-----------------------|-----------------------|-----------------------|-----------------------|----------------------------------|
| GHG emissions from cultivation, processing and transport | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| GHG emissions from direct land-use change | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Indirect land-use change | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Impacts on biodiversity | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Impact on soil, air and water | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |

Any additional comments?

2500 character(s) maximum

5.2. Effectiveness in promoting advanced biofuels

In your view, how effective has the sustainability framework for biofuels, including its provisions on indirect land-use change, been in driving the development of 'advanced' biofuels, in particular biofuels produced from ligno-cellulosic material (e.g. grass or straw) or from waste material (e.g. waste vegetable oils)?

- very effective

- effective
- neutral
- counter-productive
- no opinion

What additional measures could be taken to further improve the effectiveness in promoting advanced biofuels?

2500 character(s) maximum

5.3. Effectiveness in minimising the administrative burden on operators

In your view, how effective has the EU biofuel sustainability policy been in reducing the administrative burden on operators placing biofuels on the internal market by harmonising sustainability requirements in the Member States (as compared with a situation where these matter would be regulated by national schemes for biofuel sustainability)?

- very effective
- effective
- not effective
- no opinion

What are the lessons to be learned from implementation of the EU sustainability criteria for biofuels? What additional measures could be taken to reduce the administrative burden further?

2500 character(s) maximum

5.4. Deployment of innovative technologies

In your view, what is needed to facilitate faster development and deployment of innovative technologies in the area of bioenergy? What are the lessons to be learned from the existing support mechanisms for innovative low-carbon technologies relating to bioenergy?

2500 character(s) maximum

6. Effectiveness of existing EU policies in addressing solid and gaseous biomass sustainability issues

6.1. In addition to the non-binding criteria proposed by the Commission in 2010, a number of other EU policies can contribute to the sustainability of solid and gaseous bioenergy in the EU. These include measures in the areas of energy, climate, environment and agriculture.

In your view, how effective are current EU policies in addressing the following risks of negative environmental impacts associated with solid and gaseous biomass used for heat and power? (one answer per line)

| | effective | partly effective | neutral | counter-productive | No opinion |
|--|-----------------------|-----------------------|-----------------------|----------------------------------|----------------------------------|
| Change in carbon stock due to deforestation, forest degradation and other direct land-use change in the EU | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Change in carbon stock due to deforestation, forest degradation and other direct land-use change in non-EU countries | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Indirect land-use change impacts | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| GHG emissions from supply chain, e.g. cultivation, processing and transport | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| GHG emissions from combustion of biomass ('biogenic emissions') | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Air quality | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Water and soil quality | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Biodiversity impacts | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Varying degrees of efficiency of biomass conversion to energy | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| Competition between different uses of biomass (energy, food, industrial uses) due to limited availability of land and feedstocks | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> |
| Other | | | | | |

6.2. Any additional views on the effectiveness of existing EU policies on solid and gaseous biomass?
Please explain

2500 character(s) maximum

CPA strongly believes that market forces should determine all uses of wood and wood residuals for renewable energy. Policies that have the direct impact of diverting biomass supply to subsidize energy should be avoided.

One of the major consequences of subsidies and mandates, which distorts the U.S. and Canadian wood market and harms production of North American composite wood-based products, is that the carbon sequestering benefits provided by these products will be lost. Using wood product manufacturer residual materials for the production of composite wood panels, rather than using them as feedstock for energy production, results in long-term storage of large quantities of carbon, while retaining the energy content of the wood for possible future use in energy production. We have calculated that, when carbon emissions linked to product manufacturing are considered, the delayed carbon emissions in the first year amount to 2.4-2.7 million tons in the U.S. alone as compared to the use of an equivalent volume of biomass for production of bioenergy (assuming 7-8 million tons of composite wood panels produced annually). Once these products reach their end-of-life, then they can be diverted to energy production, representing a more efficient management of carbon. This is what makes our use of what this questionnaire calls "industrial residuals" totally unique as compared to, for example, black liquor, where there is no alternative, beneficial use to burning for energy.

Moreover, from a broader sustainability perspective, North American composite wood manufacturers take great care to responsibly source wood fiber. By taking away the ability for North American producers to competitively source wood fiber to make their products, other, wood products manufacturers from potentially less-responsible countries will step into that void. The potential negative sustainability impacts therefore would go beyond simply carbon to encompass a broader range of environmental concerns.

7. Policy objectives for a post-2020 bioenergy sustainability policy

7.1. In your view, what should be the key objectives of an improved EU bioenergy sustainability policy post-2020? Please rank the following objectives in order of importance: most important first; least important 9th/10th (you can rank fewer than 9/10 objectives):

| | 1st | 2nd | 3rd | 4th | 5th | 6th | 7th | 8th | 9th | 10th |
|--|-----------------------|----------------------------------|-----------------------|----------------------------------|-----------------------|----------------------------------|----------------------------------|-----------------------|-----------------------|-----------------------|
| Contribute to climate change objectives | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Avoid environmental impacts (biodiversity, air and water quality) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Mitigate the impacts of indirect land-use change | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Promote efficient use of the biomass resource, including efficient energy conversion | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Promote free trade and competition in | | | | | | | | | | |

| | | | | | | | | | | |
|--|----------------------------------|-----------------------|----------------------------------|-----------------------|----------------------------------|-----------------------|-----------------------|----------------------------------|----------------------------------|-----------------------|
| the EU among all end-users of the biomass resource | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Ensure long-term legal certainty for operators | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> |
| Minimise administrative burden for operators | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Promote energy security | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Promote EU industrial competitiveness, growth and jobs | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Other | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

7.2. Any other views? Please specify

2500 character(s) maximum

The European Commission (EC) as a matter of course should avoid any policies that have the direct impact of diverting biomass supply to subsidize energy. Market forces should determine all uses of wood and wood residuals for renewable energy.

The EC should also support the principle of highest value use under the waste hierarchy, which would prioritize our use of recycled raw materials to make value-added products, such as composite wood panels, over burning these residuals for energy production. The principle of “higher value use” is embodied in the widely accepted “waste hierarchy” found in the waste framework directive and commonly used in lifecycle assessments. The principle places reuse and recycling above energy recovery when prioritizing waste management solutions. We believe this concept aligns well with the EU’s recent focus on a “Circular Economy Strategy,” and it should be integrated into the final post-2020 bioenergy sustainability policy.

In addition, as the EC evaluates opportunities for reducing carbon dioxide emissions under the post-2020 bioenergy sustainability policy, we request that it factor in the benefits of carbon sequestration associated with finished wood products, such as composite wood. The use of biomass in creating long-lived products that serve as carbon sinks should be formally recognized in any carbon calculations that might be referenced in a future carbon economy. Once these products reach their end-of-life, then following the waste hierarchy, they can be burned to capture the embedded energy.

8. EU action on sustainability of bioenergy

8.1. In your view, is there a need for additional EU policy on bioenergy sustainability?

- No: the current policy framework (including the sustainability scheme for biofuels and bioliquids, and other EU and national policies covering solid and gaseous biomass) is sufficient.
- Yes: additional policy is needed for solid and gaseous biomass, but for biofuels and bioliquids the existing scheme is sufficient.
- Yes: additional policy is needed on biofuels and bioliquids, but for solid and gaseous biomass existing EU and national policies are sufficient.
- Yes: a new policy is needed covering all types of bioenergy.

8.2. In your view, and given your answers to the previous questions, what should the EU policy framework on the sustainability of bioenergy include? Please be specific

5000 character(s) maximum

The Composite Panel Association (CPA) appreciates the opportunity to submit this questionnaire on the EC’s “A sustainable bioenergy policy for the period after 2020.” CPA is a trade association based in Leesburg, VA in the US that

represents more than 95% of the North American manufacturing capacity of the composite wood industry - particleboard, medium density fiberboard ("MDF"), hardboard and engineered wood siding and trim - as well as many suppliers, distributors and major users of the industry's products. From its start in 1960, the North American composite wood industry has produced wood panels that are used in hundreds of applications, including home and office furniture, residential and commercial cabinetry, store fixtures, millwork and molding, electronics, toys and musical instruments. Particleboard, MDF, hardboard and engineered wood siding and trim are primarily constructed utilizing wood residuals (e.g., sawdust, shavings, secondary wood chips) from other wood product manufacturers, such as sawmills, planer mills and plywood plants. Historically, these residuals were either landfilled or burned on site; now they are recycled to make long-lived, carbon-sequestering composite wood products. Some of the North American manufacturers also have co-generation bioenergy facilities on site, but these operations are not government subsidized and therefore operate within an open and competitive market for wood residuals. Because of our industry's significant reliance on these residuals to make composite wood, we are concerned with how the EC will address wood residuals in the bioenergy policy for post-2020.

While we recognize that the EC is seeking to attain a higher percentage of overall energy production from renewable energy sources, we believe that market forces should determine all uses of wood and wood residuals for renewable energy. Mandates and subsidies have a number of unintended negative consequences, and we have provided several examples in our responses to this questionnaire. Therefore, we strongly encourage the post-2020 policy framework to exclude subsidies or mandates for wood and wood residuals that distort the market.

In the event that the EC determines that it still wishes to implement policies that are intended to increase demand for biomass energy production, these should be coupled with policies that increase the long-term supply of domestic wood resources to meet future demand for composite wood panels as well as new and growing markets for energy and other uses.

As noted above, we would also strongly encourage the EC to support in the post-2020 bioenergy policy framework the principle of highest value use under the waste hierarchy, which would prioritize our use of recycled raw materials to make value-added products, such as composite wood panels, over burning these residuals for energy production. Once composite wood-based products (e.g., furniture, kitchen cabinets, flooring) reach their end-of-life, then following the waste hierarchy, they can be burned to capture the embedded energy.

Finally, the use of biomass in creating long-lived products that serve as carbon sinks should be formally recognized in any carbon calculations that might be referenced in a future carbon economy.

9. Additional contribution

Do you have other specific views that could not be expressed in the context of your replies to the above questions?

5000 character(s) maximum

Finally, you may upload here any relevant documents, e.g. position papers, that you would like the European Commission to be aware of.

Thank you for participation to the consultation!

Contact

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