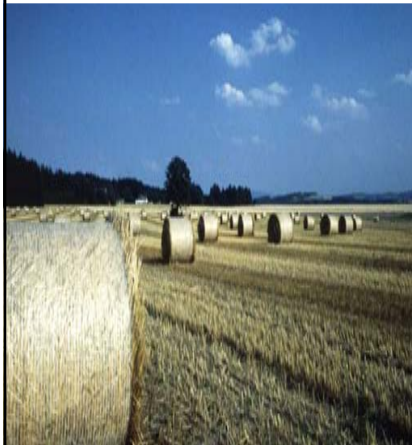




European Commission



Availability, Sustainability & Competition Challenges for Biomass



Kyriakos MANIATIS

*Biofuels & Industry
DG TREN*

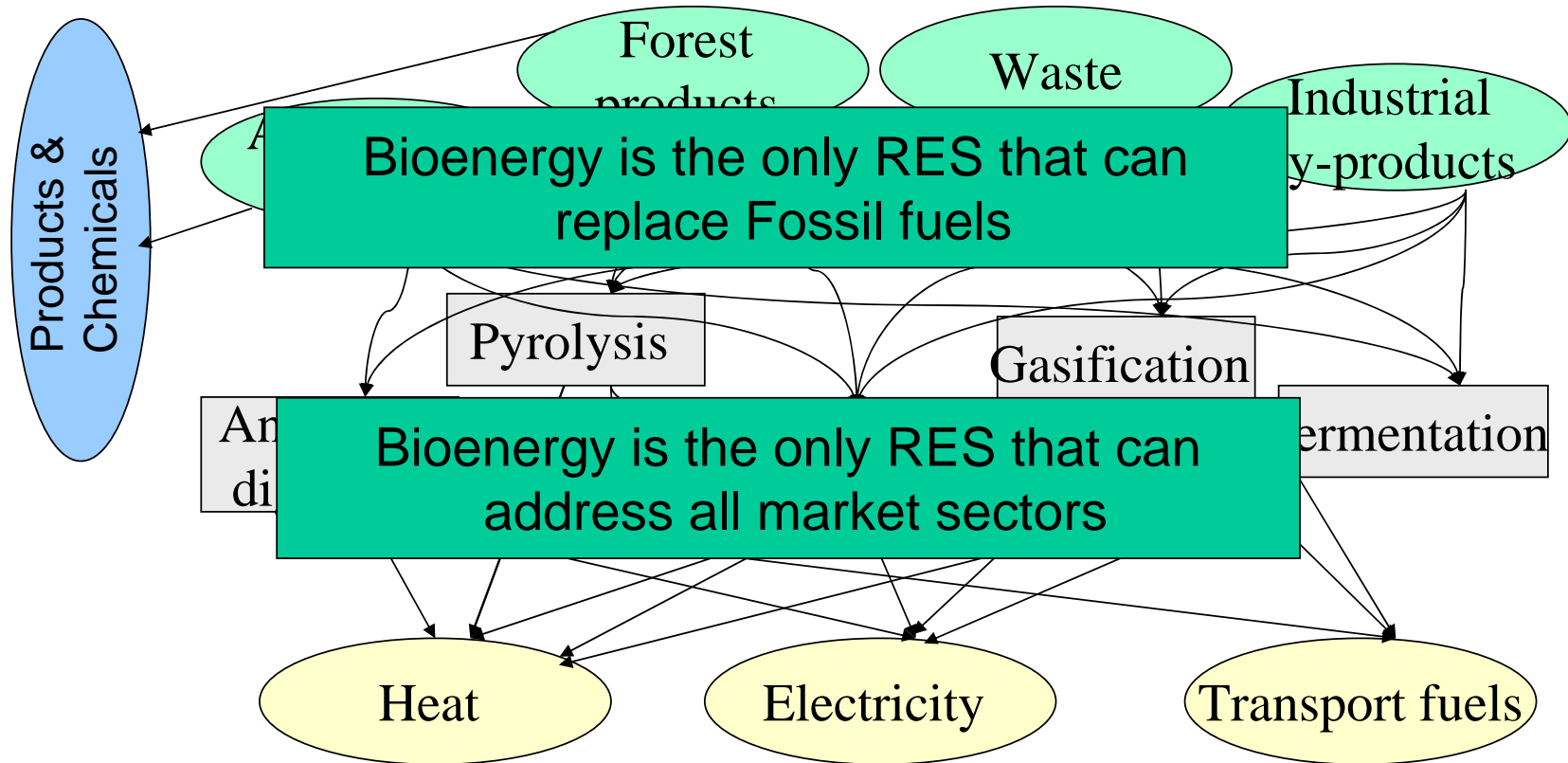


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The Bioenergy Matrix

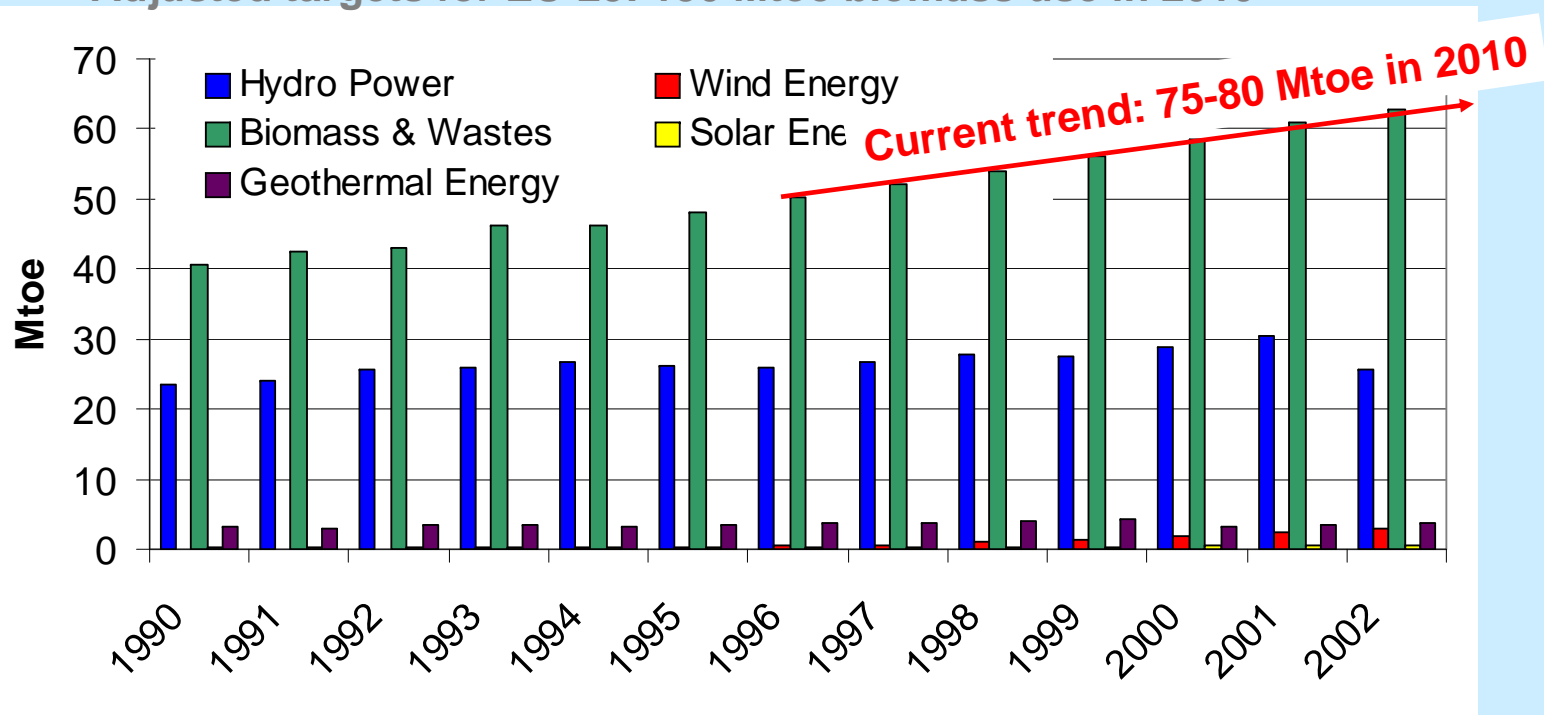




Danger of missing EU targets for 2010

White Paper target for EU-15: 135 Mtoe biomass use in 2010

Adjusted targets for EU-25: 150 Mtoe biomass use in 2010



Source: EUROSTAT

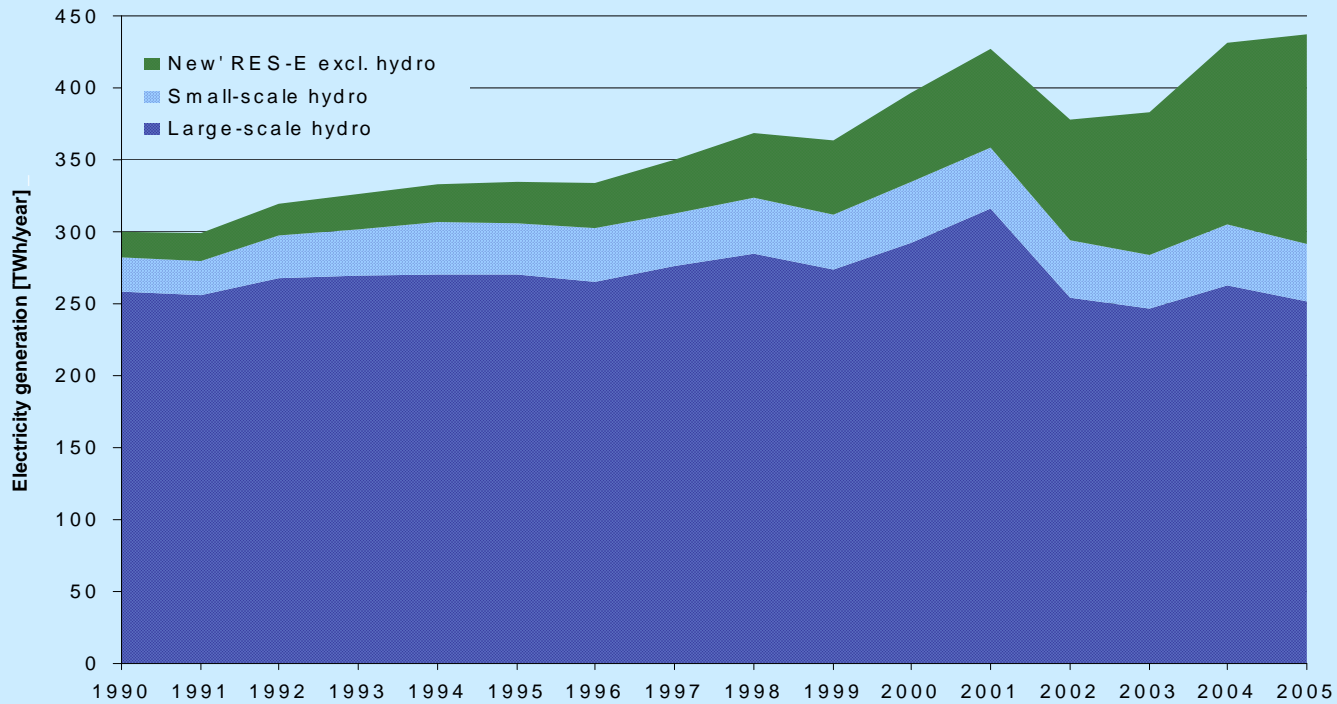


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Total RES-E production (including hydro) from 1990-2005 in EU-25

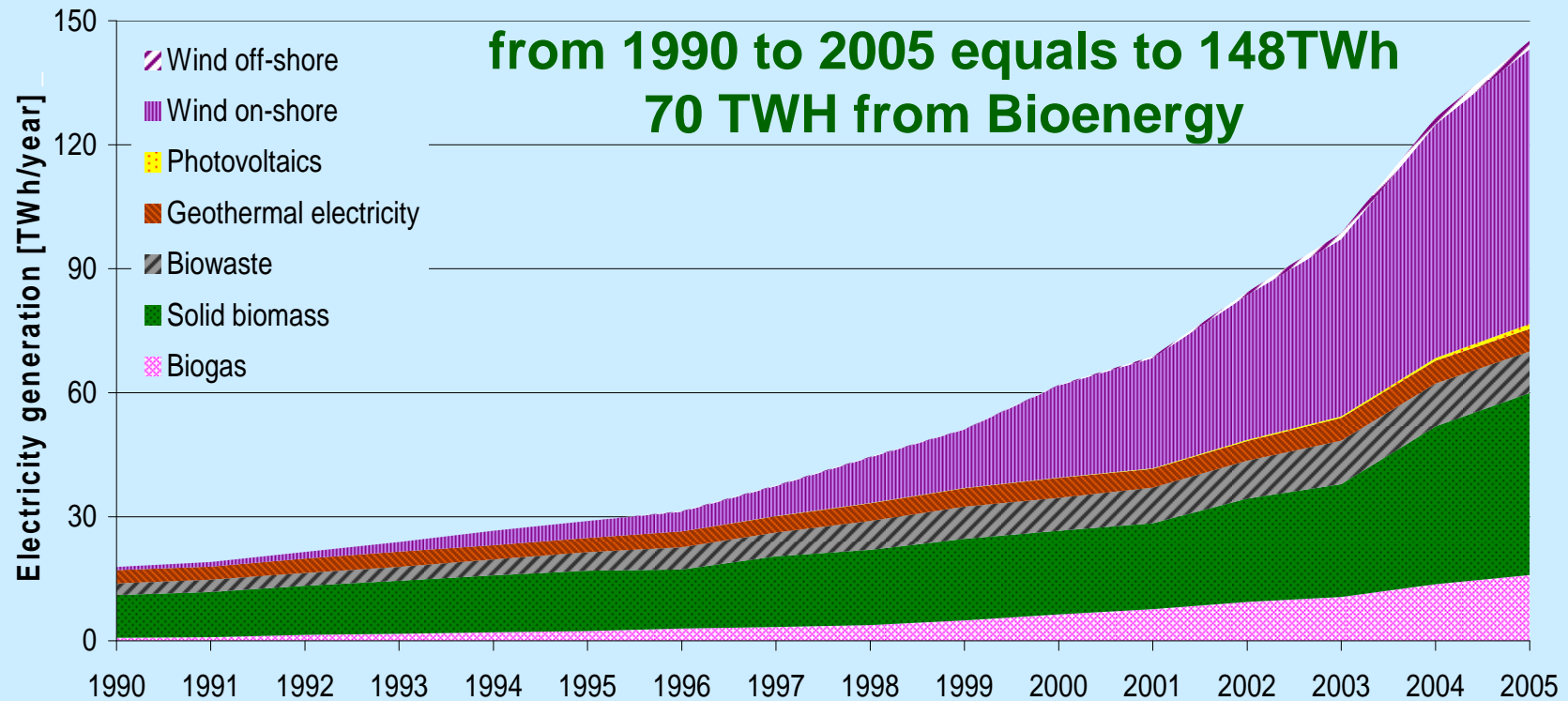


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Production of 'new' RES-E (without hydropower) (total electricity consumption of Ireland, Austria and Portugal)



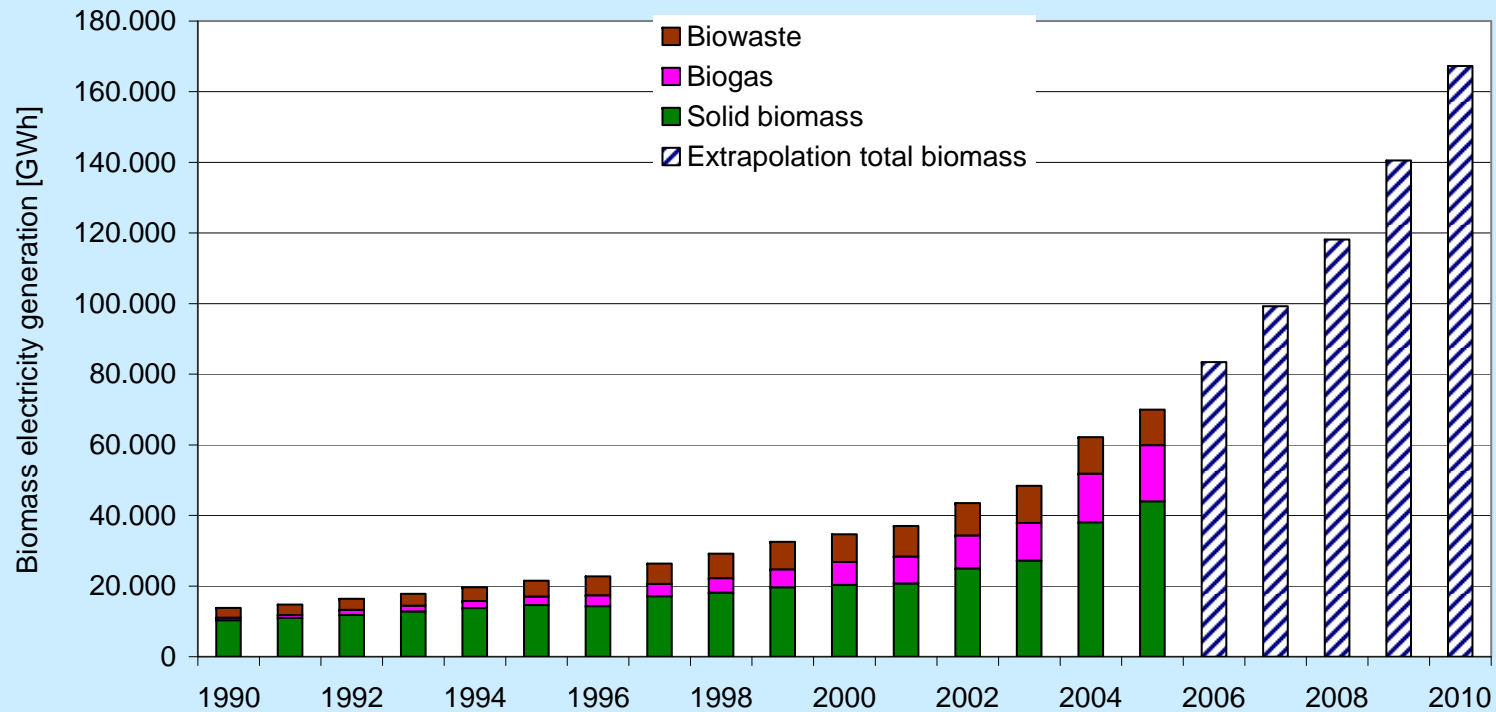
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Development of electricity generation from biomass in the period 1990-2004

Biomass: the sleeping giant waking up.



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Conclusion

Bioenergy will play a key role in all National energy policies of the Member States

Local production + Imports = Demand needs

The demand side will be addressed by the New RES Directive.

How will the supply side will be addressed??





Issues that need to be addressed

- 1. Competition of resources with other uses and sectors**
- 2. Sustainability criteria**
- 3. Strategies for mobilising the resources**
- 4. Do we need a mapping of biomass supply in the EU?**





Competition of resources with other uses and sectors

Land use: Food

Forest products industries

Recreation

Carbon sinks

Biodiversity

Energy





Sustainability Criteria

Certification systems

Only for biofuels??

WTO Compatibility

Consider other parameters than GHG??





Strategies for mobilising the resources

**How effectively do Member States use the:
Rural Development Programme?
Energy crop premium?
Are there national strategies?**

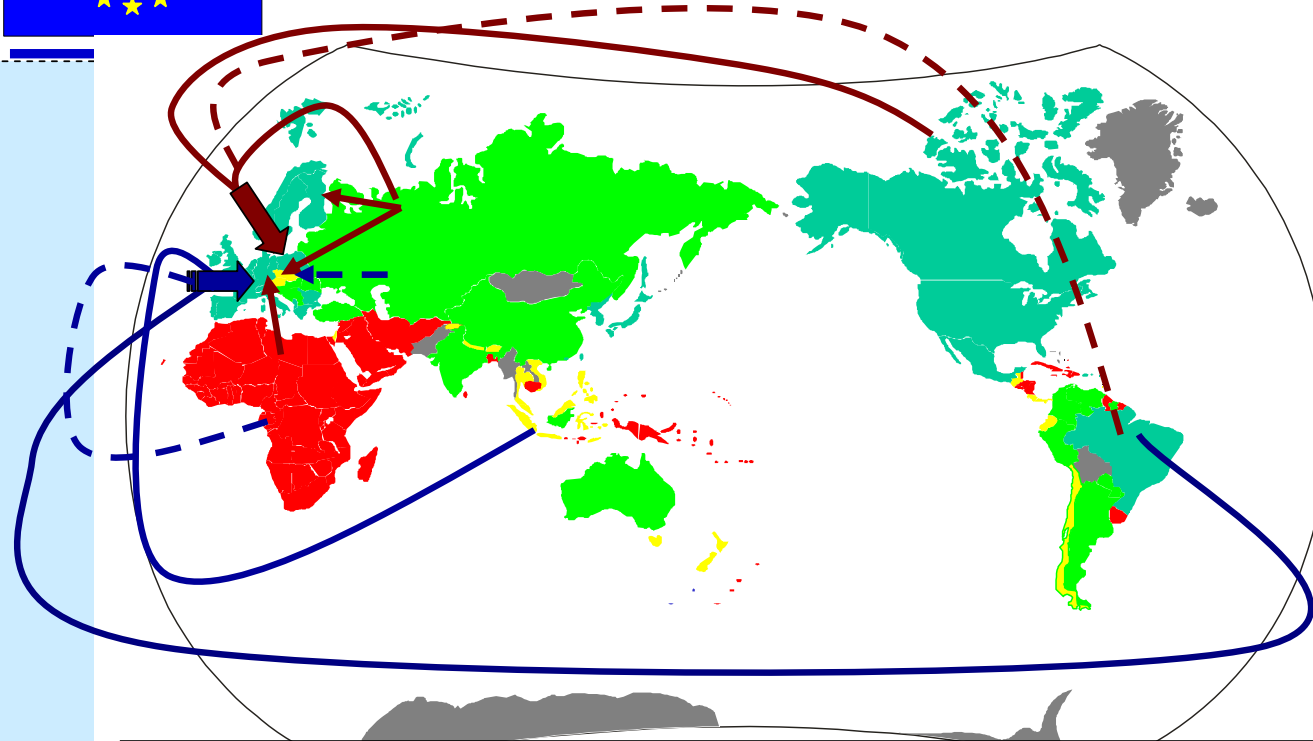
**Can we develop management strategies to extract more
wood from the forest??**

**Do we need imports and how much?
Import raw material, or
Import finished product?**





Mapping of biomass flows in the EU



Wood flows ———
Biofuel flows ———



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