

Global Biomass Pellets Market: Analysis By Production, By Consumption, By Source (Wood Sawdust, Agricultural Residue, Industrial Waste, and Others), By Application (Power Generation, Commercial & Domestic Heating, Industrial Heating, and Others), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2029

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Abstracts

The global biomass pellets market was valued at US\$11.50 billion in 2023. The market value is expected to reach US\$16.07 billion by 2029. On the other hand, the global biomass pellets market production is expected to reach 66.20 million tonnes by 2029. Biomass pellets are a type of renewable fuel made from organic materials, primarily consisting of compressed plant and wood waste. They provide a cleaner alternative to fossil fuels, emitting lower levels of greenhouse gases when burned.

The market value of biomass pellets is expected to grow in the forthcoming years due to several reinforcing trends. The global commitment to decarbonization, as highlighted by international agreements such as the Paris Accord, is likely to intensify, leading to more aggressive national policies promoting renewable energy. Additionally, rising environmental awareness among consumers and businesses is expected to drive demand for cleaner energy solutions, including biomass pellets. Economic factors, such as the increasing cost competitiveness of biomass pellets due to economies of scale and continued technological improvements, will also play a crucial role. Furthermore, the expansion of the biomass pellet market into emerging economies, which are seeking sustainable and affordable energy solutions to support their growing energy needs, is likely to contribute significantly to market growth. The market is expected to grow at a CAGR of approx. 6% during the forecasted period of 2024-2029.

Market Segmentation Analysis:

By Production: The report provides an analysis of the biomass pellets market based on production. Economic considerations play a critical role in driving biomass pellet production. The rising cost of fossil fuels, coupled with their price volatility, has led many industries and consumers to seek more stable and cost-effective energy alternatives. Biomass pellets provide a relatively stable pricing structure due to their renewable nature and diverse sources of raw materials. Additionally, advancements in pellet production technology have significantly reduced production costs. Innovations in biomass processing, pelletization, and combustion technologies have improved the efficiency and quality of pellets, making them more competitive with traditional fuels. The scalability of pellet production has also improved, allowing producers to benefit from economies of scale, further driving down costs, and making biomass pellets an economically viable energy source. The global biomass pellets market production has also been analyzed based on eleven countries namely, The US, Canada, Denmark, Vietnam, France, Poland, Sweden, Russia, Lithuania, Austria, and the Rest of the World.

By Consumption: The report further provides an analysis of the biomass pellets market based on consumption. The consumption of biomass pellets is increasing globally due to a combination of environmental, economic, and regulatory factors. A primary driver is the growing recognition of the need to transition to sustainable energy sources to mitigate climate change. Biomass pellets offer a renewable, low-carbon alternative to fossil fuels, making them an attractive option for reducing greenhouse gas emissions. Governments worldwide are implementing policies and incentives to promote renewable energy use, which has spurred the adoption of biomass pellets in power generation, heating, and industrial applications. The global biomass pellets market consumption has also been analyzed based on eleven countries namely, UK, South Korea, Japan, Germany, Denmark, Italy, France, Netherlands, Sweden, The US, and the Rest of the World.

By Source: The report provides the bifurcation of the biomass pellets market into four segments based on the source: Wood Sawdust, Agricultural Residue, Industrial Waste, and Others. Wood sawdust has become the highest source of biomass pellets due to its abundance and favorable properties. The wood processing industry generates vast quantities of sawdust as a by-product, making it an economically viable raw material. Sawdust is relatively easy to collect, transport, and process into pellets, and it possesses a high energy density and low moisture content, which enhance its

combustion efficiency. On the other hand, agricultural residue is expected to be the fastest-growing segment in the biomass pellet market, owing to the increasing focus on sustainable farming practices and waste management. It has driven interest in utilizing agricultural by-products for energy production. As agriculture produces significant amounts of residues, converting these materials into biomass pellets provides an efficient way to manage waste while generating renewable energy.

By Application: The report further provides the segmentation of the biomass pellets market based on the following applications: Power Generation, Commercial & Domestic Heating, Industrial Heating, and Others. The power generation segment held the highest share of the market and is expected to be the fastest-growing segment in the forecasted period. The biomass pellet market for power generation has been growing significantly due to the increasing global commitment to reducing carbon emissions and transitioning to renewable energy sources. Biomass pellets offer a viable alternative to coal in power plants, as they can be co-fired with coal or used in dedicated biomass power plants to produce electricity. The high energy density and relatively low moisture content of biomass pellets make them an efficient fuel for power generation.

By Region: The report provides insight into the biomass pellets market based on the regions: Europe, North America, Asia Pacific, and the Rest of the World. Both in terms of value and production, Europe held the highest share of the market. In terms of value, Asia Pacific region is expected to be the fast-growing region. In the UK, the biomass pellet market is flourishing due to a robust policy framework aimed at reducing carbon emissions and promoting renewable energy. The UK government has implemented various initiatives such as the Renewable Heat Incentive (RHI) and Contracts for Difference (CfD) scheme, which provide financial support for renewable energy projects, including biomass. These policies have incentivized the conversion of coal-fired power plants to biomass and the adoption of biomass heating systems in both residential and commercial sectors. Moreover, the UK's commitment to phasing out coal by 2024 has accelerated the shift towards biomass.

China faces challenges with energy security, being heavily reliant on imported fossil fuels. Growing its domestic biomass pellet industry lessens dependence on foreign resources and provides a more sustainable energy solution. As an example, the government has implemented policies encouraging the planting of energy crops specifically for biomass production, showcasing their commitment to this alternative fuel source.

The US boasts a robust biomass pellet production industry, driven by several key

factors. Firstly, the nation possesses vast natural resources. Immense forests across the Southeast and Pacific Northwest provide a steady supply of wood residues like sawdust and shavings, perfect raw materials for pellet production. Secondly, supportive government policies have played a significant role. Incentives like tax credits for renewable energy production have encouraged companies to invest in biomass pellet facilities.

Market Dynamics:

Growth Drivers: The global biomass pellets market has been growing over the past few years, due to factors such as increasing installed pellet production capacity and number of plants, growing greenhouse gas emissions, growing electricity generation through renewable energy sources, growing number of ENplus and PFI certified plants, increasing shift from conventional source of energy to eco-friendly sources, expansion in emerging markets, favorable government initiatives and regulations, and many other factors. Increasing installed pellet production capacity significantly bolsters the biomass pellet market by enhancing supply chain reliability, meeting rising demand, and fostering market stability. As the global demand for renewable energy sources intensifies, biomass pellets, known for their carbon neutrality and sustainability, are becoming a crucial component in the energy mix. Expanded production capacity allows manufacturers to meet this burgeoning demand more effectively, reducing the likelihood of supply shortages and price volatility.

Challenges: However, the market growth would be negatively impacted by various challenges such as feedstock unavailability and quality issue, uses of fertilizer and pesticides, etc. Feedstock unavailability and quality pose significant hurdles for the growth of the biomass pellet industry due to their direct impact on production costs, reliability, and sustainability. Inconsistent availability of biomass feedstock, influenced by factors such as weather patterns, seasonality, and competition with other industries, can disrupt production schedules and hinder the scalability of pellet plants.

Trends: The market is projected to grow at a fast pace during the forecast period, due to various latest trends like integration with circular economy, diversification of feedstock, inclusion in carbon trading and offset markets, increasing use in industrial applications, technological innovations, etc. Inclusion in carbon trading and offset schemes provides a significant incentive for industries and power producers to adopt biomass pellets to meet their carbon reduction targets. As companies strive for carbon neutrality, the demand for certified low-carbon energy sources like biomass pellets will increase. This heightened demand can drive investment in biomass pellet production infrastructure,

research, and development, leading to technological advancements and cost reductions.

Impact Analysis of COVID-19 and Way Forward:

While the COVID-19 pandemic initially disrupted the global biomass pellets market by affecting production and supply chains, the increased residential demand for heating and a strategic pivot towards more resilient and sustainable practices helped the market to stabilize and adapt. The post-COVID-19 period saw the global biomass pellets market not only recover but also transition towards a more sustainable and resilient growth path. The pandemic-induced disruptions led to a strategic re-evaluation of production and supply chain practices, fostering innovation and investment in renewable energy solutions.

Competitive Landscape:

The global biomass pellets industry is fragmented. The key players in the global biomass pellets market are:

Drax Group Plc.
Highland Pellets
Graanul Invest
Enviva Inc.
JP Green Fuels
Lignetics Inc.
An Viet Phat Group (AVP Group)
Valfei Products Inc.
Wismar Pellets GmbH
Premium Pellets Ltd.
REDAL Ltd.

In the competitive landscape of the biomass pellets market, players are adopting various strategies to expand their market share and gain a competitive edge. For instance, in 2023, Enviva Inc. broke ground on the company's forthcoming Epes plant under construction in Sumter County, AL. In 2020, Enviva acquired over 300 acres in the Epes Industrial Park to build the company's largest wood pellet production plant. In July 2022, the company began construction of its fully contracted Epes plant, which would have a nameplate capacity of 1.1 million metric tons per year and is expected to be in service by mid-2024, with production fully ramped by 2025. On the other hand, in

February 02, 2024, Graanul Invest announced the launch of the company's latest premium pellet brand, g Graanul, tailored specifically for Baltic customers. The Naturkraft-branded wood pellets and 15 kg pellet bags would continue to be sold in all European countries outside Baltics.

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