



**Day 1 - 12 Feb 2019, Tuesday**

- 12:00 Conference Registration
- 13:30 Opening Chairman's Welcome & Remarks  
*Mr. Brodie Govan, Biomass Broker  
 Voyage Power Ltd*
- 13:40 **Overview of the European Wood Pellet Market**
- Market pricing has reached record levels on the spot market, what are the drivers behind this?
  - Is enough new supply set to come online to satisfy European demand?
  - How will the pending UK exit from the EU impact the market?
  - Is Russia becoming more than just a supply hub for spot volumes?
- April Poole, Editor  
 Argus Biomass Markets*
- 14:10 **Utility and Trader Panel**
- Expert projections on supply and demand for the year ahead
  - Insight into the key price drivers in the European and Asian pellet market
  - A discussion on how to make the wood pellet market more standardized.
  - Where is future demand and new markets likely to emerge?
- Panel:**  
*Mr. Thomas Meth, Co-Founder & Executive VP, Sales & Marketing  
 Enviva LP (Moderator)*

- Mr. Fabien Mehu  
 Head of Biomass Trading  
 Engie Energy Management Scrl  
 Senior Representative  
 Orsted*
- Mr. Michael Hjorth Christensen, COO  
 CM Biomass Partners A/S*
- Mr. Christian Joore, Lead Trader  
 Vattenfall Energy Trading GmbH  
 Senior Representative  
 RWE Supply and Trading*

- 15:00 Discussion followed by Networking Tea
- 15:45 **The Next Frontier for the Wood Pellet Market: A Look at Future Markets for the Wood Pellet Industry**
- What does the future hold for the European market post subsidies?
  - Is Germany a realistic future market?
  - An insight into alternative markets for wood pellets?
  - How can the market evolve and develop to avoid structural shorts in the market?
- Mr. Thomas Meth, Co-Founder & Executive VP, Sales & Marketing  
 Enviva LP*
- 16:30 **Russia's emerging role in the Industrial Pellet Market**
- How much is Russia producing today and what is its potential?
  - What are the challenges and obstacles associated with sourcing

- from Russia?
- Can it be a supplier of pellets in long-term contracts?
- Mr. Michael Hjorth Christensen, COO  
 CM Biomass Partners A/S*

17:00 - 18:30 hrs.  
 Discussion & **Networking Cocktail Reception**  
 for ALL Speakers & Participants

18:30 End of Day One

**Day 2 - 13 Feb 2019, Wednesday**

- 09:00 Opening Chairman's Welcome & Remarks  
*Mr. Brodie Govan, Biomass Broker  
 Voyage Power Ltd*
- 09:10 **Overview of the International Wood Chip Market**
- An insight into projected supply & demand
  - Analysis of the key supply regions & new projects
  - Overview of wood chip pricing delivered into Europe
  - A look at Scandinavian demand
- Ms. Rachael Levinson  
 Biomass Research Manager  
 Hawkins Wright Ltd.*
- 09:40 **Panel: The growth of the wood chip market**
- Are wood chips becoming a recognized and standardized commodity?
  - Is there enough supply to meet demand?
- 10:30 Discussion followed by Networking Coffee
- 11:15 **The Challenges of a Dual Fuel Buyer: HOFOR's Sourcing of Wood Pellets and Wood Chips**
- Overview of HOFOR's biomass operations and demand
  - Insight into the procurement structure of each fuel
  - The current and future role of both feedstocks in Orsted's plants
- Mr. Morten Algreen Nielsen  
 Biomass Procurement Officer  
 Fuel & Logistics  
 HOFOR A/S*
- 11:45 **Return of Eastern Canada as a Global Pellet Producer**
- What has happened to the East coast in recent years?
  - An insight into the new projects
- Mr. Morten Algreen Nielsen  
 Biomass Procurement Officer  
 Fuel & Logistics  
 HOFOR A/S*

- Can wood chips be purchased on long term contracts?
- Panel:**  
*Ms. Rachael Levinson  
 Biomass Research Manager  
 Hawkins Wright Ltd. (Moderator)*
- Mr. Morten Algreen Nielsen,  
 Biomass Procurement Officer,  
 Fuel & Logistics  
 HOFOR A/S*

*Senior Representative  
 Orsted*

*Mr. Jan Groeneveld  
 Biomass Sourcing Manager  
 Uniper*



- and existing assets coming online
- What is the potential of this region as a global producer?

*Dr. William "Bill" Strauss  
 President & Founder  
 FutureMetrics, LLC*

**12:15 Impact of the New Sulphur Regulations on Biomass Freight Markets**

- Insight into what the new regulations mean and what impact it will have
- A look at additional potential regulations that could impact the market
- An overview of dry bulk markets and rates

*Mr. Derek Langston, Senior Director  
 SSY Consultancy & Research*

12:45 Discussion followed by Networking Luncheon

**14:15 European Heating Markets: Overview on Supply & Demand Fundamentals**

- An insight into the key trading routes and flows across Europe
- Where is the supply emerging from and who are the key consumers?
- How does the lack of industrial volume affect the heating markets?

*Arnold Dale, Vice President Bioenergy  
 Ekman & Co AB*

14:45 Topic to be confirmed

**15:15 Future of Portugal as an Industrial Producer of Wood Pellets**

- Overview of the current

- Portuguese supply
- What is next for Portugal after a challenging year for producers?
- Will Portugal focus on heating markets?

*Alexandra Pedro  
 Overseas Sales Director  
 Pinewells, S.A.*

**15:45 Global Producer Panel**

- A review of the past twelve months from a producer perspective.
- Analysis and discussion on pellet specifications and sustainability challenges
- Is there enough supply capacity to meet rising demand in Europe and Asia?
- Is it beneficial for producers to supply to both the industrial and industrial markets and how easy is it to operate between both markets?

**Panel:**

*Mr. Henry Pease, Biomass Trader  
 RWE Supply & Trading GmbH  
 (Moderator)*

*Mr. Thomas Meth, Co-Founder & Executive VP, Sales & Marketing  
 Enviva LP*

*Mr. Michael Dalton  
 International Commercial Manager  
 Georgia Biomass, LLC*

*Tomas Isaksson, Director  
 Pellet Operations  
 Stora Enso Skog AB*

16:30 Final Discussion followed by End of Conference.

**“European wood pellet & chip pricing on the rise as growing demand outstrips supply”**

New European demand from Denmark, the UK and the Netherlands has propelled wood pellet prices to record highs this year. Additional coal conversions by existing biomass consumers Orsted and UK generator Drax has boosted EU imports. While new demand is emerging from conversions by EPH in the UK and German utilities RWE and Uniper in the Netherlands.

During the first half of 2018, availability of spot wood pellet supply from Europe, Russia and North American has been extremely tight and in short supply. Production from the Baltic countries and Russia was lower as flooding led to difficulty sourcing material from forests. Portuguese production faced difficulty as forest fires impacted output and led to a lack of spot offers. While additional supply from North America failed to materialize with a shortage in new supply capacity and production failing to match growth in Europe.

Wood pellet prices are being boosted by growing competition between Asia and Europe for North American wood pellets as demand grows in both regions. Looking ahead the outlook for producers in Europe and North America looks positive with demand and consumption in Europe, Japan and Korea on the rise.

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**Key Highlights & What to Expect**

- Key overview of wood pellet & chip supply & demand fundamentals
- Panel discussions from industry experts covering latest developments
- Key presentations from utilities, producers & traders
- Insight on supply landscape amid growing demand
- Analysis of global wood chip supply & key players
- Discussion on competition between Europe & Asia for wood pellet supply
- Overview of European heating markets & pricing

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