

TASK 40

Sustainable International Bio Energy Trade: securing supply and demand

Progress Report

**ExCo 55
Copenhagen, Demark**

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**Prepared by
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Introduction

This is the third progress report of Task 40 under the Bio-energy Agreement of the IEA: “Sustainable international bioenergy trade; securing supply and demand”, prepared for ExCo meeting 55, 26-27 May 2005 held in Copenhagen, Denmark. The proposal for this task was prepared in 2003 and formally submitted and presented to ExCo 52, held in November 2003 in Campinas, Brazil, where it was accepted as a new task under the Bio-energy Agreement.

The kick-off meeting of this new task was held on 19-20 January in Deventer, the Netherlands, where the work programme was discussed with the new team and various activities started-up. During the first open event of Task 40 in October 2004 in Rome, a more final work programme was agreed upon with concrete deliverables a time schedule and allocated partners per deliverable. After that, the membership still expanded and in 2005 various new members are expected. This may still lead to additions to the activities and re-shuffling of the work among the various members.

At present, the participating countries in Task 40 are the Netherlands, Sweden, Norway, Brazil, Finland, and Canada. Canadian membership was secured end of 2004 and is funded by industry (Dynamotive). In addition two international institutions, FAO and the World Bank are affiliated to the task and participate in the activities as if they are members. At the moment of writing of this progress report, Belgium has requested observer status for 2005 aiming for formal membership in 2006. Italy and the UK are expected to formally apply for membership of task 40 before the ExCo meeting in Copenhagen end of May 2005. Both countries were represented in the various task events over the past year. In addition, when Germany signs up to the IEA Bio-energy Agreement, it is expected German membership of Task 40 can be secured.

With the positive developments in (formal) membership of Task 40 over 2004 and the expected expansion during 2005, it became feasible to appoint staff capacity at Utrecht University starting 1st of April 2005. André Faaij and Martijn Wagener will be structurally supported by Martin Junginger. He will be responsible for several deliverables (see under ‘deliverables’) and support task management and dissemination activities. This will be a major improvement compared to 2004 and 2005 a variety of written products of Task 40 should be finalized or prepared as final draft.

Objectives

The future vision on global bio energy trade is that it develops over time into a real “commodity market” which will secure supply and demand in a sustainable way; sustainability brings a key factor for long-term security.

Task 40 investigates what is needed to create a “commodity market” for bio-energy. By means of this platform in which industrial parties, governmental bodies and NGO’s participate, this task will contribute to the development of sustainable bio-energy markets on short and on long term and on different scale levels (from regional to global). In its intended activities, the task programme will take the several stages of development of biomass markets in different regions of the world into account.

Furthermore, the ambition is that this platform can set the agenda and initiate a host of new activities relevant for developing biomass potentials worldwide.

Below, the generic objectives of the task are given, divided in shorter and medium term objectives. Further prioritisation of activities is discussed under the header ‘deliverables for this triennium’.

Short term objectives

1. Agreement on the emphasis on specific objectives and deliverables to be fixed together with participating countries and their stakeholders (especially interested industrial parties).

2. Overview of available information, work, insights, modelling tools and their possibilities and limitations for evaluating biomass markets (resources and utilisation) on different scale levels (global, national, regional).
3. Improvement on insights in influencing factors on the supply and demand of biomass for the short, medium and long term
4. Overview of development of biomass markets in various parts of the world and generic lessons to be deducted
5. Synthesis of existing trade experiences (i.e. Sweden, Finland, Brazil, the Netherlands) and survey on the possible effects towards existing markets (e.g. pulp wood, forestry and agricultural products and residues) on bio energy trade
6. Synthesis of existing barriers, hampering development of a (global) commodity market (policy framework, ecology, economics)
7. Identification of strategies to overcome “barriers”
8. Identification of sustainability criteria and their local influence on the biomass market (e.g. development of best practice guidelines)
9. Increasing public awareness of international bio energy trade (i.e. within IEA and other international organisations)
10. Exchange of information on bio energy experiences between parties with a different stage of market development

Medium term objectives

1. International platform (representatives from all kind of relevant stakeholders) for bio energy trade (e.g. supply and demand, sustainability, financial products etc.), required for the necessary dialogue.
2. Dynamic demand and supply models of bio energy, that takes influencing factors (pricing, actual demand, stocks, energy use for long distance transport) into account
3. Identification and analysis of options for integrating the production of biomass for energy and subsequent export into agricultural and agro-forestry systems especially in developing countries and countries in transition.
4. Evaluation of the political, social, economic and ecological impact of biomass production and trade in these systems for the local people, for food production; also in relation to specific sustainability criteria.

All activities of the task aim at generating and disseminating information on technical and on barriers and solutions for developing biomass markets. Task 40 is closely related to other IEA Bioenergy activities, most notably Tasks 30 and 31 (on Short Rotation Crops for Bio-energy Systems and Biomass production for Energy from sustainable forestry), Task 38 (Greenhouse gas Balances of biomass and bioenergy systems) and Task 29 (Socio-economic drivers in implementing bio-energy projects).

Collaboration with those tasks is already discussed and partly planned for the coming years, e.g. by organizing joint activities and joint publications.

Operating Agent / Task Leader

The Operating Agent for the Task is the Ministry of Economic Affairs, represented by Erik Wissema. Alternate Operating Agent is the Netherlands agency for energy and the environment (NOVEM), represented by Kees Kwant. The Task Leadership is shared between Andre Faaij of the Copernicus Institute for Sustainable Development (Department of Science, Technology & Society) of the Utrecht University in the Netherlands and Martijn Wagener from the Dutch Utility Essent Sustainable Energy in the Netherlands.

Beginning of 2005, Rob Remmers from Essent had to withdraw from task leadership due to job changes within the company. His role is now fully taken over by Martijn Wagener and the joint task coordination of Utrecht University and Essent remains unchanged.

Participation

At present, the participating countries in Task 40 are the Netherlands, Sweden, Norway, Brazil, Finland, and Canada. Canadian membership was secured end of 2004 and is funded by industry (Dynamotive). In addition two international institutions, FAO and the World Bank are affiliated to the task and participate in the activities as if they are members.

At the moment of writing of this progress report, Belgium has requested observer status for 2005 aiming for formal membership in 2006. Italy and the UK are expected to formally apply for membership of task 40 before the ExCo meeting in Copenhagen end of May 2005. Both countries were represented in the various task events over the past year. In addition, when Germany signs up to the IEA Bio-energy Agreement, it is expected German membership of Task 40 can be secured. Germany was already represented during the last Task event in March 2005 during the Energy Week of the World Bank.

When all the above is successful, membership would add up to 10 countries and two affiliated international bodies.

Up-to-date information is given under 'contact information'.

BUDGET

Expenditures over 2004 were kept to a minimum given the uncertainties with the task membership (as well as the Euro/U\$ exchange rate). A surplus budget remained therefore over 2004.

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With the expected income over 2005, the task budget seems well in line with scheduled expenditures.

Funds received for 2005 only amount 30.000 U\$ so far. It is expected payments of contributions will proceed on short term.

Unchanged is the ambition to secure other funds to support task activities. EU funding, World Bank support to carry out relevant research in the context of the work programme of Task 40 and various national funds are considered. Various national activities (e.g. in Finland and Norway) highly relevant for the task were started and will have a positive impact on the output of Task 40.

Contributions from task participants (e.g. via national projects) are also under discussion. An important planned deliverable of Task 40 is to provide an overview of biomass trading experiences, covering both best practice examples as well as market assessments; this will be finalized over the summer of 2005.

ACTIVITY MEETINGS

Two major components of the task meetings are the discussion of the progress in task activities and developments in individual member countries. Meeting reports are (and will be) prepared and can be downloaded after each meeting from the Task's internet site: www.fairbiotrade.org.

An overview of task meetings/events organised and scheduled is provided below:

Date	Location	Status	Note
January 19-20, 2004	Deventer, the Netherlands	Implemented	Kick-off meeting; overview of expertise, discussion and finalisation of work programme and deliverables.
May 13, 2004	Rome, Italy	Implemented	Informal task meeting, discuss progress on planning and participation.
October 26-28, 2004	Rome, Italy (FAO)	Implemented	Business Forum on bio-energy trade; open meeting of two days hosted by FAO + internal T40 meeting
March 16-18, 2005	Washington DC (World Bank).	Implemented;	Socio-economic impacts and benefits of international bio-energy trade. Combined event with IEA task 29 and the Energy Unit of the World Bank. Organized as a side event during the Energy Week of the World Bank. + internal T40 meeting.
October 2005	Paris, France and Trondheim Norway	Under discussion	Contributions to both the 14 th European Biomass Conference (with ETA-Florence) and the Nordic biomass conference (with EUBIONETII) in sessions/workshops.
November 28-December 2, 2005	Campinas, Brazil	Scheduled, striven for combined effort with Tasks 30 and 31	Bussiness Forum on biotrade with Brazilian industry and covering sustainable biomass production systems for export and certification. 2 day internal task meeting to finalize several key deliverables of the work programme
mid 2006	Norway (suggestion)	Under preparation; principle agreement between Task 38 and Task 40	Joint event on bio-energy trade, GHG accounting and emission trading. Both Task 40 and task 38 agreed on this event.
End 2006	Finland (suggestion)	Suggested by Lappeenranta University.	End of task meeting possibly to be combined with a business forum on biotrade aimed for Eastern Europe and in particular Russia.

PROGRESS

After the Business Forum held at FAO in Rome, preparations started for the combined Task 40 and Task 29 event hosted by the World Bank during the energy week. Of both meetings reports are available via the task website.

The website is continuously developed further and will be expanded further over 2005. Clearly, visitor numbers are increasing.

The work programme is now well structured and a variety of reports is to become available over 2005 (see section deliverables below).

Dissimination activities in terms of newsletter contributions and publications of leaflets is somewhat behind the desired schedule. This aspect (deliverable no. 9 of the work programme) will receive special attention over the summer period of 2005.

Further networking activities are deployed with Belgium, Germany, Japan and South Africa. Formalized collaboration with EUBIONET-II is under discussion.

Also, UNECE (UN commission for Europe) is interested in collaboration and possibilities for formalizing this are currently explored.

The work of Task 40 has been presented for several audiences, such as the 2nd Ukrainian Biomass Conference, the 2nd World biomass Conference, the IEA Task 39 meeting in Kyoto-Japan, a VIEWLS workshop (DG-TREN funded accompanying measure) in Warsaw, Poland, the National IEA Bio-energy Agreement workshop in the Netherlands and IEA related workshops in New Zealand and Australia. Task 40 was also invited to present its' work for an event organized by the Heinrich Böll Stiftung for German Members of Parliament, car manufacturers, biofuels industry, etc. in April 2005.

Further invitations have been received for another workshop on international bio-energy trade and development in London end of April, in Bonn, Germany June 2005 and a Norwegian event on biotrade (...date).

Deliverables

Deliverables in terms of written reports and analyses are (logically) modest in this starting year of IEA Task 40. Many aspects of the work programme (see below) are currently worked on and several key reports are scheduled for 2005. Following deliverables were supplied:

- Website
- Conference paper for the 2nd World Biomass Conference, Rome May, 2004.
- Progress reports ExCo
- Bussiness Forum October 2004 in collaboration with FAO.
- Organisation Event during Energy Week World Bank
- Draft Country reports on biomass markets and international trade
- Report Bussiness Forum in collaboration with FAO (to be published as paper version in 2005).
- Joint paper and leaflet with IEA Task 38 on trade-offs between physical biomass trade and emission trading.
- Report workshop during Energy Week of the World Bank (to be published as paper version in 2005).

A Special Issue of the Journal Energy for Sustainable Development on international bio-energy trade and sustainable development, largely based on contributions made during the World Bank event will be published in 2005.

Reports from Task 40 in 2004 made available via the website:

- André Faaij, Rob Remmers, Martijn Wagener, Kees Kwant, Proposal for a new Task within the IEA Bioenergy Agreement on Sustainable International Bio Energy Trade: securing supply and demand. Working period 2004 – 2006, September 2003.
- Minutes of the kick-off Meeting of Task 40 under the Bio-energy Agreement of the International Energy Agency. Sustainable International Bio Energy Trade: securing supply and demand, Working period 2004 – 2006, Deventer, the Netherlands, 19 - 20 January 2004.
- Minutes of internal Task 40 meeting held at FAO Headquarters, Rome - Italy, the Netherlands, 27th October 2004.
- IEA Task 40 Website: www.fairbiotrade.org
- Work Programme task 40 2004-2006, October 2004.
- Andre Faaij & Rob Remmers Progress Report, TASK 40 - Sustainable International Bio Energy Trade: securing supply and demand, ExCo53b Doc 06.11, Prepared for ExCo 53 Luzern, Switzerland, 6-7 May 2004
- Andre Faaij, Rob Remmers & Martijn Wagener, Task Leaders, Progress Report, TASK 40 - Sustainable International Bio Energy Trade: securing supply and demand, 2nd Progress Report, ExCo 54, Ottawa, Canada, 6-7 October 2004
- H. Risnes, Bioenergy in Norway - status 2004 and measures to secure future fuel supply and demand, Country report for the IEA Bioenergy Task 40, Enova, October 2004
- Tapio Ranta, Jussi Heinimö, International Bioenergy Trade: Experience in Finland, Lappeenranta University of Technology, Finland, October 2004
- Faaij, G. Best, R. Remmers, etc. *Report on a Bussiness Forum on International Bio-energy Trade*. Organized by IEA Task 40 and the Food and Agriculture Organisation of the UN (FAO), Copernicus Institute - Utrecht University, December 2004

- G. Volpi, A. Faaij, *Energieexperten debattieren über den Handel Mit Bioenergie*. In: Rundbrief Forum Umwelt & Entwicklung von Deutscher Naturschutzring und Verband Entwicklungspolitik Deutscher Nichtregierungsorganisationen, 4/2004. Pp. 12-13.
- Faaij, A., *International Bio-energy Trade; background, opportunities and IEA Task 40*. In: Proceedings of the 2nd International Ukrainian Conference on Biomass for Energy. September 20-22, 2004, Kiev, Ukraine
- Faaij, A., *A Green OPEC: Large Scale International Bio-energy Trade*, In: Proceedings of the GHGT-7 - 7th International Conference on Greenhouse Gas Control Technologies, September 5-9, 2004, Vancouver, Canada.
- E. Smeets, A. Faaij, I. Lewandowski, *A quickscan of global bio-energy potentials to 2050 - an analysis of the regional availability of biomass resources for export in relation to underlying factors*, Report prepared in the context of the FairBioTrade Project for NOVEM and Essent, Copernicus Institute - Utrecht University, NWS-E-2004-109, March 2004. Pp. 67 + Appendices.
- Lewandowski, A. Faaij, *Steps towards the development of a certification system for sustainable biomass trade - analysis of existing approaches*. Report prepared in the context of the FairBioTrade Project for NOVEM and Essent, Copernicus Institute for Sustainable Development - Utrecht University, NWS-E-2004-31, July 2004. Pp. 56 + Appendices
- Faaij, A., A. Wieczorek, M. Minnesma, *International debate on international biotrade*. In: Proceedings of the Second World Biomass, May 10-14, 2004, Rome - Italy, W.P.M. van Swaaij, T. Fjällström, P. Helm, A. Grassi (eds.). Published by ETA-Florence, 2004. Vol. II Pp. 2239-2244.
- Faaij, A., R. Remmers, M. Wagener, K. Kwant, *Launching a new Task under the IEA Bio-Energy Agreement; Sustainable International Bio-energy Trade: Securing Supply and Demand*. In: Proceedings of the Second World Biomass, May 10-14, 2004, Rome - Italy, W.P.M. van Swaaij, T. Fjällström, P. Helm, A. Grassi (eds.). Published by ETA-Florence, 2004. Vol. II Pp. 2221-2224.
- B. Schlamadinger, A. Faaij, E. Daugherty. *Should we trade biomass, bio-electricity, CO2 credits of green certificates?* In: Proceedings of the Second World Biomass, May 10-14, 2004, Rome - Italy, W.P.M. van Swaaij, T. Fjällström, P. Helm, A. Grassi (eds.). Published by ETA-Florence, 2004. Vol. II Pp. 2217-2220.
- K. Damen, A. Faaij, *Greenhouse Gas Balances of biomass import chains for "green" electricity production in the Netherlands*. Leaflet published by IEA Task 38, December 2004. Pp.6

PROGRESS ACHIEVED

See other sections.

DELIVERABLES FOR THIS TRIENNIUM

The list below summarizes the deliverables/work packages covered by the Task. This list is based on both the discussions and written input from various parties. Each "deliverable leader" provided a (draft) work plan + proposal for contents, type of deliverable (report, case studies, etc.).

The list covers the key objective, the type of inputs required or available and the actual products and crude time planning.

As explained, if the membership grows in the first half of 2005 with possibly 4 member countries, contributions to various deliverables may be expanded.

1. Market experience

Obtain an overview of current trading experiences and markets as well as potential future markets.

Following issues should be covered:

- a. Monitor the development of biomass markets and trade over time.
- b. Market assessment of different biofuels forest products, intermediates, vegetal oils, other transport fuels over some 5-10 years influenced by current policies (like Kyoto), all within reason.

- c. Outline trading opportunities, including potential future markets and demand.
- d. Provide forecasts/projections of biomass trading, possibly with price projections and production costs.
- e. Use clear definitions of commodities.

Responsible partners: coordination by **Sweden**, support from all T40 members

Deliverables:

- f. Country reports (all members); various reports are available on the website www.fairbiotrade.org.
- g. Business Forum Rome (expanded with other business fora during this triennium).
- h. Edited final synthesis report based on the country reports; coordination and integration work is taken up by Sweden. Task management (Junginger and Faaij) will support drafting of a final report over the summer of 2005.

2. Strategic advice on barriers, opportunities and strategy

Compile a strategic document that covers:

- Inventory of barriers (technical, logistic, economic, organisation, regulatory) and opportunities for developing working biomass and bio-energy markets and (international) trade.
- A distinction should be made between direct biomass imports for energy and indirect imports (e.g. biomaterials)
- Linkages to (emerging) carbon markets should be incorporated (such as the European Emission Trading System).
- Formulate strategies to cope with those barriers.

Responsible partner: **Netherlands** (supported by all partners).

Deliverables:

- A Strategic review document, which also serves as input for strategic advice to IEA Bio-energy (and other bodies). A conference paper will be presented during the biomass conference in October 2005. This document will be transferred to an easy-to-read paper/leaflet before the end of 2005.
- Strategic advice on how to develop and support bio-energy trade, e.g. for the EC, IEA Exco, FAO, etc. Largely a compilation of the results from various deliverables; to be delivered over 2005 – 2006.

3: Modelling markets:

This activity should Provide insight in the development of biomass resources and supplies in relation to market demand; e.g. by applying various (modelling) tools. The analyses should evaluate the importance of different developments for international bio-energy trade.

The key of such an analysis could consist of a combination of modelling approaches and compile an integrated model that could do the job on different levels of detail.

Responsible partners: **Norway** (Risnes, Solberg a.o.), **Netherlands** (Faaij) and **Finland** (Ranta, Heinimo) pursue funding possibilities (national) for research activities.

Deliverables:

One or more project proposals (EU, combined national funds) coordinated by T40 members. For the EC, one of the coming calls will be considered.

4: Supply chain analysis (including forestry chains).

This work covers performance evaluations (techno-economic) and further development/optimization of long distance bio-energy supply chains, in particular sea transport. This could especially be approached by doing concrete case studies of chains and transport systems. Following suggestions and considerations are raised:

- It is to be recognized that more efficient transport chain designs will involve different actors with different viewpoints and priorities. Optimisation can therefore mean different things for each individual actor.
- A model from Utrecht University on techno-economic logistic chains is available for analyses.
- Canada has a key interest to explore the needs/possibilities for new transport and shipping concepts and optimising supply chains for such concepts.
- Finland has one ongoing project in this area that can deliver results to the task
- Sweden suggests that there should be room for ad hoc case studies the coming years.

Responsible partners: coordinating group by **Canada, Finland, Norway**; (supported by Sweden, Netherlands).

Deliverables:

- Case studies; being carried out in 2004-2005
- Various tools for chain analysis
- Report; final draft to be discussed during the T40 meeting end of 2005.

5: Certification systems:

Certification, standardization and terminology for sustainable bio-energy trade. Following remarks/additions are made to this field:

- The EC has ongoing efforts to formulate normalisation and standardisation procedures for biomass. This material should be made available to the task (via EC).
Sweden: make clear what rules of conduct are, the needs for providing information and monitoring activities needed for certification.
- The importance (and experience of WTO regulations for agriculture and other sectors should be addressed. The potential role of WTO for bio-energy trade should be included in this work. *[It is indeed the intention to keep close contact with WTO and invite representatives to T40 events. Only due to a busy schedule WTO was not represented at the business forum in Rome].*
- FAO has considerable experience with certification. An example is the Codex Alimentaris for food products and other experiences with food commodities. FAO is planning work on certification on project level for bio-energy projects (e.g. linked to CDM). It will be difficult for FAO to coordinate work in T40, but it will be strongly supported from their side.
- It is agreed that efficient use should be made of developed criteria and indicators from other bodies (like UNEP, OECD; the environmental indicator work). Different levels of certification and markets can be perceived.
- In the UK there are major concerns about the transaction costs of certification. It is recommended to make a distinction between coherent frameworks and communication to consumers. Some bilateral/multilateral efforts are already ongoing.
- For the Netherlands, certification is a key priority in the national debate. A review of certification systems is available and regional case studies on impacts and possible criteria for biomass production for export. Follow-up work is being scheduled.

This activity has strong links with deliverable 7.

Responsible partner: **Netherlands**, with FAO, UK (EC is expected to participate when membership would be secured).

Deliverables:

- Event in fall/winter 2005 on sustainable biomass production systems. Possibly in Brazil in combination with IEA task 30 and 31 (short rotation coppice and sustainable forestry)
- Synthesis report from Task 40 and input for strategic advice to IEA. Report will be drafted over the summer of 2005, coordinated by Utrecht University.

6: Pilot projects:

Identify possibilities for pilot- and demonstration projects and aim for supporting their development; especially in developing countries (e.g. Africa). Key output for the shorter term should be a work plan, which describes how pilot projects are set-up in an international setting and what is needed from organisational and financial point of view. The World Bank and FAO have prime experience in this field. Further comments:

- The World Bank has suggested that a first feasibility study could be supported by them in the context of Task 40.
- A report (supported by SIDA) on possibilities/modalities of biomass production for export (vs. local use) in developing countries can be made available.
- The concept of setting up pilot projects seems to receive support from the Dutch government in the coming years.
- Pilot/demonstration activities in OECD countries could be considered too (e.g. pyrolysis capacity in Canada for export markets and evaluation the replication potential for developing countries).
- FAO: Pilots in the agricultural sector are a prime interest for FAO. The potential impacts of growing export markets for developing countries should be evaluated, especially with a focus on employment and development potential for rural areas. This is closely linked to activity no.
- From the UK (Imperial College) work on sweet sorghum production in Central and Southern Africa with FAO could be fed into the Task 40 work.

Responsible partner: World Bank / FAO; Netherlands, UK, Canada

Deliverables:

- Plan of action/work programme on setting up pilot projects.
- Selection of potential projects.
- First feasibility studie(s) to be developed over 2005 by World Bank.
- Subject for March 2005 event hosted by Worldbank in Washington during the Energy Week in combination with IEA task 29 on socio-economic aspects of bio-energy trade and potential contribution to (rural) development

7: Case studies; impact analysis:

Provide insight (e.g. through case studies and best practice examples) in the socio-economic and ecological impacts of biomass production and trading schemes and demonstrate how bio-energy trade can contribute to general (sustainable) development targets.

Remarks:

- FAO: potential impacts of increasing international bio-energy trade on food security, soil quality, water resources, forest cover and socio-economic impacts should be investigated. The envisaged International Bio-Energy Programme of FAO would lead to several activities (case studies, development of analysis tools) in this field and FAO would like to play a leading role in this.
- Attention should be paid to the competition for biomass fuels for international and local/national markets.
- The long term perspective for biomass production and supplies is an important element for the analyses.
Elements of this work are covered by Task 29 (socio-economic effects of bio-energy systems; reports (e.g. by Reinhart Madlener) are available. Collaboration with Task 29 is desired.

Responsible partners: **FAO**, Netherlands, UK, World Bank

Deliverables:

- Concrete case studies, in particular in developing countries. More material is made available from studies in the Netherlands, the UK and Sweden.
- Event during the Energy Week of Worldbank in Washington in combination with IEA task 29 on socio-economic aspects of bio-energy trade and potential contribution to (rural) development.
- Subject for fall 2005 event possibly in Brazil in possible combination with IEA task 30 and 31 (forestry and short rotation coppice).

8: Evaluation of markets (Ethanol and other commodities):

This work should evaluate major emerging markets for bio-energy trade focusing on specific commodities. Focus will first lay on ethanol. When the approach is successful, the Task can continue with assessing other commodities like pellets, vegetal oils, bio-oil or electricity at a later stage.

Remarks:

- In the UK an evaluation has been made about the fuel ethanol mandates and possible impacts.
- In Brazil there is ongoing debate on expanding export markets for ethanol (largely driven by the producers). For biodiesel this is in the starting phase and largely a government initiative at this stage.
- Evaluations should include the potential markets of relevance, e.g. driven by the biofuels directive in Europe, the Pacific Rim area, etc. Further, trade barriers in place should be part of the evaluation.
- In the evaluation the production potentials should play a role. (on global scale; considering different biomass resources and technologies)

Responsible partners: **Brazil**; UK, Canada (others when other commodities are going to be addressed).

Deliverables:

Report; final draft on bio-ethanol to be discussed during the T40 meeting in Brazil end 2005.

9: Improved communication, raising awareness, networking and information exchange on the fields covered by the Task.

Responsible: **Netherlands** (task leader), supported by all T40 members

Deliverables: all of the above,

- Website distribution; the website www.fairbiotrade.org is developed further over the reporting period and visiting number are growing considerably.
- Via newsletters; this aspect will receive special attention in 2005.
- Active distribution of results to dedicated audiences, etc. Compact written reports/papers on appropriate level (non-technical, policy oriented character. Task 40 could determine who should receive such advice (with particular focus on industry as well as government level). Such documents should be actively distributed. Starting from autumn 2005 such reports could be released on an annual basis.

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Contact information of the Task members is given below.

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