



Advanced Woody  
Biomass Alliance

# Advanced Woody Biomass Alliance

Sustainability & Policy Working Group  
Meeting

April 16, 2026



# Agenda

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1. Welcome and Anti-trust
2. EU updates
3. Market updates:
  - Netherlands
4. Guest Presentation: Christian Rakos, President, World Bioenergy Association
5. AOB

## AWBA Anti-trust Policy

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We will conduct today's meeting in compliance with AWBA's Anti-trust Policy. According to this policy, we will not discuss pricing or price-fixing of pellets or any underlying wood pellet fiber. We will also not discuss anything that could be construed as a boycott.

If we hear the conversation move in this direction, we will quickly bring it back to the agenda. If anyone has any questions about AWBA's Anti-trust Compliance Policy, please do not hesitate to ask. Thank you.

## AI Note Takers

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We kindly ask all participants to refrain from using AI-powered note-taking tools (such as Otter.ai, Fireflies, and similar services)

Thank you!



# EU Update

## RED revision: biomass rules back in focus

### Commission consulting on post-2030 renewables framework

- Adjusting renewable targets, incl. potential electrification target
- Scope includes **biomass rules (Articles 3 & 29)**
- Two-stage process: freeform (April) + detailed questionnaire (June)

### Commission testing reopening of biomass rules:

- Strengthen, streamline or maintain current criteria
- Extend rules to materials and chemicals
- Concerns on biomass availability and decline in EU carbon sink

## RED revision: AWBA initial position

### Article 29 (sustainability & GHG): do not reopen

- No evidence base (RED III still in implementation)
- Successive revisions, further would undermine investment certainty
- Increasing relevance: ETS, aviation, maritime, CRCF
- Poor timing given geopolitical energy pressures

### Article 3: targeted changes

- **Remove industrial-grade roundwood** as a simplification measure (overlaps with cascading)
- **Cascading to remain flexible**, no prescriptive EU-wide rules

**European industry split:** full reopening vs targeted

Wider AWBA discussion with membership ahead of June



# EU Update

## Key concerns: Leaked Regulation for certification schemes

### Partial draft leaked for new rules governing audit and mass balance rules

- **Text incomplete, further analysis required**
- Early indication of significant tightening in rules

### Proposed increase in audit frequency

- Recertification/surveillance audits to be undertaken every six months, on-site
- Traders can only be certified for six months; must change auditors every 3 years

### Proposed shorter mass balance window:

- Producer window consistent at 12 months, but operator window reduce to 1 month (from 3)

## Further concerns: Leaked Regulation for certification schemes

### Feedstock definitions

- VS required to define exhaustive feedstock lists
- Must include detailed qualitative description and clear criteria for auditors to identify feedstocks

### Mill audit enhancements

- Inclusion of technical specification in audit guidance
- Audit to include “technology capability check”

### Union Database requirements

- References to Union database on Biofuels, implying scope may be extended to cover solid biomass
- Key sections on this missing from draft



# EU Update

## Limited EU-ETS reforms agreed

### Considerable member state pressure to lower EU carbon prices

- Aim to ease costs for power sector and industry
- Wide range of options discussed, incl. market intervention and system suspension
- Commission steered outcome to technical changes

### No structural reform to EU-ETS at this stage

- Enabling use of reserves to moderate price levels
- Planned tightening of industry emissions paused

### Downward pressure on carbon prices expected

- Changes likely to keep carbon prices lower than previously expected
- Ongoing pressure to act means further intervention likely

## CRCF: BECCS Methodology becomes law

### Legislative steps completed

- All Parliamentary motions to block methodologies defeated
- CRCF methodologies now formally passed into law

### Alignment with RED III secured

- Sustainability criteria remains consistent with RED Article 29 and Article 3 as implemented in member states

### BECCS policy to move to demand creation phase

- Integration into EU ETS
- Development of EU demand-side mechanisms (e.g. buyers club)
- Likely to shape voluntary carbon removal markets



# Netherlands

## Dutch Govt. to consider biomass in capacity market

- During formation of Dutch Government commitment was made to establish a capacity market
- Capacity markets pay power plants to be available for generation, required to be technology neutral and could create opportunities for biomass
- Comments from D66 (largest coalition party, biomass-sceptic) indicate an openness to biomass:
  - Prime Minister Rob Jetten “...*the use of coal is prohibited by law at a certain point. But that does not mean you have to close coal fired power plants. These plants can also be used for power generation with other fuels, such as biomass or other sources.*”
- But there is still clearly a division within the Government and the D66:
  - Climate Minister Van Veldhoven “...*on MP Bontenbal’s request I will also involve coal and biomass plants into our [capacity market] calculations. I however doubt whether these options emerge as cost effective, but we do not rule it out...*”