

BioTrade2020plus

Supporting a Sustainable European Bioenergy Trade Strategy

Intelligent Energy Europe
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Deliverable 6.4

**Report of the final BioTrade2020plus
workshop, held in Brussels on 14 June 2016**

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The BioTrade2020plus Project

Objectives

The main aim of BioTrade2020plus is to provide guidelines for the development of a **European Bioenergy Trade Strategy for 2020 and beyond** ensuring that imported biomass feedstock is sustainably sourced and used in an efficient way, while avoiding distortion of other (non-energy) markets. This will be accomplished by analyzing the potentials (technical, economical and sustainable) and assessing key sustainability risks of current and future lignocellulosic biomass and bioenergy carriers. Focus will be placed on lignocellulosic biomass from current and potential future major sourcing regions of the world (US, Ukraine, Latin America, Asia and Sub-Saharan Africa).

BioTrade2020plus will thus provide support to the use of stable, sustainable, competitively priced and resource-efficient flows of imported biomass feedstock to the EU – a necessary pre-requisite for the development of the bio-based economy in Europe.

In order to achieve this objective close cooperation will be ensured with current international initiatives such as IEA Bioenergy Task 40 on “Sustainable International Bioenergy Trade - Securing Supply and Demand” and European projects such as Biomass Policies, S2BIOM, Biomass Trade Centers, DIA-CORE, and PELLCERT.

Activities

The following main activities are implemented in the framework of the BioTrade2020plus project:

- Assessment of **sustainable potentials of lignocellulosic biomass** in the main sourcing regions outside the EU
- Definition and application of sustainability criteria and indicators
- Analysis of the **main economic and market issues of biomass/bioenergy imports** to the EU from the target regions
- Development of a dedicated and **user friendly web-based GIS-tool** on lignocellulosic biomass resources from target regions
- **Information to European industries** to identify, quantify and mobilize sustainable lignocellulosic biomass resources from export regions
- **Policy advice on long-term strategies** to include sustainable biomass imports in European bioenergy markets
- **Involvement of stakeholders** through consultations and dedicated workshops

More information is available at the BioTrade2020plus website: www.biotrade2020plus.eu

About this document

This report corresponds to D6.4 – Workshop report of BioTrade2020+. It has been prepared by: CENER and WIP, with the contribution of VITO, IINAS, Utrecht University, DLO and Imperial.

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Work package	WP6
Task	Task 6.6
Lead contractor for this deliverable	CENER
Authors	Ines del Campo, David Sánchez, Dominik Rutz
Collaborations	Luc Pelkmans, Uwe Fritsche, Martin Junginger, Thuy Mai Moulin, Lotte Visser, Gert-Jan Nabuurs, Rocio Diaz-Chavez and the Advisory Board members

Dissemination Level		
PU	Public	x
PP	Restricted to other programme participants (including the Commission Services)	
RE	Restricted to a group specified by the consortium (including the Commission Services):	
CO	Confidential, only for members of the consortium (including the Commission Services)	

Version	Date	Reason for modification	Status
0.1	17/06/16	Preliminary version	Finished
0.2	14/07/16	Comments from WIP	Finished
0.3	23/08/2016	Comments from VITO and Advisory Board Members	Finished

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1. Introduction

BioTrade2020plus aims at strengthening links and information exchange between stakeholders involved in international sustainable biomass trade. For this reason among the several dissemination activities scheduled during the course of the project under task 6.6 of WP6, the following events were initially scheduled:

- Collection end-users tool requirements¹.
- Midterm and cooperation IEA Bioenergy workshop (M8- October 2014, Brussels).
- Final Dissemination workshop (M30, August 2016, Brussels).

The following report aims at describing the main issues (organization, celebration and outcomes) from the Final Dissemination Workshop, titled: “Towards a European Trade Strategy for Sustainable Solid Biomass Imports to the EU” held on June 14th 2016 in Brussels as a parallel event of the European Sustainable Energy Week (EUSEW).

¹ This action was considered as a workshop in the Annex 1- Description of the work. Finally, in order to get a higher impact was replaced by personal interviews in the 22th European Biomass Conference and Exhibition (for more details, see deliverable D4.2. of the project).

2. Final dissemination workshop

2.1. Workshop objective

One of the objectives of the BioTrade2020+ project is to propose appropriate long-term strategies and support frameworks which can form a basis for a balanced approach between promoting the use of domestic biomass, while also keeping markets open for sustainable imports of biomass.

In addition to the BioTrade2020plus project, the Biomass Policies project aims to develop integrated policies for the mobilization of “resource efficient” indigenous bioenergy “value chains” in order to contribute towards the 2020 bioenergy targets set within NREAPs & 2030, and other EU28/National policy measures.

2.2. Workshop organization

The workshop was held in the Permanent Representation of Spain with the support of the Delegation of Navarra in Brussels on Tuesday 14th June 2016, from 9:00 to 16:00. It was included as a parallel event in the European Sustainable Energy Week (EUSEW).

It was organized by the BioTrade2020plus consortium led by WIP and supported by CENER. The attendants list and a copy of the programme can be found in the Appendix 2. The total number of the attendees was 41 people from 14 countries: 9 European countries and 5 countries outside Europe (USA, Canada, Brazil, Gambia, and South Africa).

2.3. Session 1: Overview on Solid Biomass Developments

After a short introduction by **Dominik Rutz (WIP)**, the moderator of the first session, the workshop began with a welcome and introduction of the BioTrade2020+ project by the coordinator **David Sánchez (CENER)**. He explained the project approach which is based in the following pillars:

- Sustainability & availability
- Case Study regions
- Strategies and policies

The outcomes of these three pillars will be gathered in the development of an interactive online tool that will allow to determine for each case study region:

- Sustainable biomass potential
- Cost-supply curve
- SWOT analysis

Another relevant tool for the project is the stakeholder engagement strategy that allows to carry out teleconferences and workshops with key stakeholders related to international biomass trade.

More details about the project as well as all presentations from this workshop are available on the project website (www.biotrade2020plus.eu).

Heinz Kopetz (World Biomass Association) was invited as speaker, external to the project (*although being involved in the Advisory Board of the project*), to give his view on International developments on the production and use of solid biomass. Since 2014 the World Biomass Association (WBA) publishes an annual report on bioenergy statistics (Global Bioenergy Statistics Report). It includes data from all bioenergy sectors including biofuels, biogas, pellets, charcoal etc. The geographical distribution of data is divided in different levels: global, continental and regional. For the elaboration of this report, WBA collaborates with other agencies: IEA, FAO, REN21 and IRENA.

He showed some figures about bioenergy supply worldwide and who are the world leaders (Asia has the highest supply of biomass, followed by the Americas and Europe).

Regarding solid biomass it comprises different origins: forestry, agricultural and waste.

Most of the biomass supply is from the forestry sector (87%) followed by agriculture (10%) and wastes (3%). Fuelwood is the largest biomass resource globally.

Mr. Kopetz also pointed out that solid biomass is the most important form of biomass for energy, with more than 90%. Its biggest share comes from forests. The main applications are heat and electricity production, approximate 50 EJ goes to heat and 5 EJ to electricity. He also mentioned other special issues related to solid biomass: the global decrease in forest area; some figures of woodfuel production (since 2000, global woodfuel production increased by 5.25%); electricity generation from biomass.

To increase energy density and reduce transport costs, solid biomass can be processed into: charcoal, pellets, torrefied wood, pyrolysis oil, briquettes.

- Charcoal is a highly underestimated sector. More than 50 million tonnes of charcoal are produced annually, mostly in Africa.
- Pellets are one of the fastest growing bioenergy sectors. Current production exceeds 25 million tonnes, predominantly in the EU and USA.

He also highlighted some new developments in the use of solid biomass:

- New biomass gasification equipment, small scale, came to the market (50 – 200 kW el) allowing high efficient heat driven electricity generation
- Increased interest in torrefied wood and pyrolysis oil as energy carrier with a high energy density
- New big biomass plants for District Heating started operation (Fortum Stockholm 330 MW)

He also gave some key messages of the contribution of solid biomass to the fulfillment of the Paris Agreement after COP21:

- A new strategy is needed: carbon taxes instead of the ETS system
- All countries should phase out fossil fuels and developed countries should take the lead
- Developing countries should go directly to renewables, should not build up a fossil structure.
- It is necessary to help develop the infrastructure for the use of biomass, in the long run exports from those regions with a structural over supply of sustainable biomass

The main conclusions highlighted were:

- Bioenergy is the largest renewable energy source globally (14% out of 18% share of renewables in the energy system).
- Electricity production from biomass is the third largest among renewables – 3 times more than solar PV in 2013!
- Forestry sector is the largest contributor to the biomass supply (in the form of fuelwood and charcoal).
- Pellets is one of the fastest growing bioenergy sector – more than 25 million tonnes produced.
- Charcoal is highly underestimated sector – larger than pellets in terms of energy and fuel use.



Figure 1: Mr. Heinz Kopetz from World Biomass Association

Rocio Díaz-Chavez (Imperial College) presented the work carried out (in collaboration with IINAS) within BioTrade2020plus for the determination of biomass potentials and sustainability issues.

She presented the Project approach on Sustainability issues, which includes:

- Guidelines for assessing the sustainability risks per type of biomass resource in every focus region
- List of relevant indicators at project level for all biomass, processes and end-uses
- Social, economic, environmental as well as political and institutional considerations

For the determination of the technical potential of lignocellulosic biomass, the following issues have been considered:

- General data
 - Legislation related to bioenergy
 - Data on main feedstocks used or with potential for biomass trade
- Production volumes
- Planted areas
- Harvested areas
- Irrigated areas
- Yield
 - National average
 - Data on main biomass currently exported
- Production volume
- Quantity exported
- Price
- Biodiversity
 - Legal/policy/governance related data
 - Geographic/land use data
 - Biological/physical data
- Land use
 - Land area under specific classes
- Area of land under each specified class
- Definition used in each country for that type of land class
- Socio-economic
- working conditions
- land tenure/rights
- Food insecurity issues
- ILO conventions
- Standards and Certification

Ms. Diaz-Chavez also presented a summary table showing the technical potential of the 6 selected case studies. Brazil, Colombia and United States have the highest potential whereas Kenya has the lowest. Indonesia and Ukraine have medium to high values.

She also explained the guidelines that have been taken into account for the development of a SWOT analysis. It has been carried out according to the following six principles:

- 1) Biomass availability;
 - a) Sustainable availability
 - b) Exportable availability
- 2) Biomass mobilisation and security of supply
- 3) Biomass cost
 - a) Cost to road side
 - b) Collection & pre-treatment cost up to harbour

- c) Transport cost long distance
- 4) Environmental sustainability
- 5) Social sustainability
- 6) Governance

Regarding sustainability an initial review of the main sustainability schemes at regional, national and international level has been carried out. An umbrella approach based on what has been developed for the S2BIOM project has been carried out for BioTrade2020plus.



Figure 2: Ms. Rocio Diaz Chavez from Imperial College of London

Questions: *why other sectors are not obliged to certify their products (ie: pulp and paper; chemical industry; etc.).*

Luc Pelkmans (VITO) introduced the topic of Strategies and Policies in two projects: BioTrade2020plus and Biomass Policies.

He introduced Biomass Policies, which is another European project that has been supported by the Intelligent Energy for Europe (IEE) programme of the EC. This project, that has recently ended (March 2016), has dealt with developing integrated policies for the mobilization of resource efficient biomass value chains, focused on indigenous biomass potentials in the EU. He gave an overview of the main future policy recommendations from the Biomass Policies project in terms of biomass supply, logistics, heat, electricity and advanced biofuels.

A Biomass policy toolkit (“tailoring evidence to support policy recommendations and decision-making”) is available at: <http://www.biomasspolicies.eu/tool>.

After the overview of the main policy recommendations from the Biomass Policies project, Mr. Pelkmans gave an overview of the work in the BioTrade2020plus project on strategies and policies. Some highlights of a global survey carried out in 2015, with 127 participants from 35 countries were presented, in terms of key principles for sustainable biomass trade, barriers for trade and policy options. Based on these results, a number of suggestions were made for long term strategies in relation to biomass trade. The main issues are:

- Biomass production & harvest in the frame of long-term sustainability
- A serious reduction of fossil fuels is needed in the frame of climate change mitigation
- Support sustainable mobilization
- Efficient use of resources
- Monitor direct and indirect impacts on markets (EU and outside)
- Independent knowledge to inform the public debate

- Provide financing / investment models (access to finance)
- Biomass quality and commodities



Figure 3: Mr. Luc Pelkmans from VITO

2.4. Session 2: Potentials of Exporting Countries: Case Studies

After the coffee break, **Martin Junginger (Utrecht University)** introduced the second session dealing with the biomass potentials of exporting countries and introduced the Case Studies selected under BioTrade2020plus and the methodology adopted for the calculation of the sustainable biomass potentials. He also explained the scenario approach that has been taken into account for the studies:

- Business as usual (BAU): current situation, 2020 and 2030
- High export (HE): current situation, 2020 and 2030

Then, the leaders of the different case studies made a brief presentation of the main results achieved:

- **Gert-Jan Nabuurs (Alterra)** presented the United States case study
- **Wolter Elbersen (Wageningen University and Research)** introduced the case study about Colombia
- **Lotte Visser (Utrecht University)** presented the case studies about Brazil and Ukraine
- **Thuy Mai-Moulin (Utrecht University)** showed the results from Kenya and Indonesia case studies

After the case study presentations, Mr Junginger gave an overview and summarized the individual and combined results of the case studies and also the costs, and GHG emissions.

The main conclusions were:

- BioTrade2020plus does not aim to determine how much biomass is available in these regions but how much biomass can be exported from these regions to the EU which of course depends on the price.
- US South East shows highest export potentials; sustainability requirements are the main limit for the net sustainable export potential by 2030.

- In other sourcing regions, the speed of biomass mobilisation and building up infrastructure/logistics is the main constraint.
- GHG emission thresholds are not an issue, but at current price levels, exports would be limited to 200-600 PJ.
- Competing demand from South & East Asia may further limit export to the EU.
- US SE, Ukraine and Colombia could make significant contributions (200-600 PJ) to fill the EU supply gap.
- Not all feedstock types are included for all supply regions
- Other promising sourcing countries (e.g. Canada, Mozambique) not (yet) included.

Questions:

- What will be the most preferred industry to use the biomass, the energy sector or other industries (bioproducts/chemical)?
- In the GHG emissions calculations for sugar cane residues, has the mechanised labor been taken into account?

All workshop presentations are available at: <http://www.biotrade2020plus.eu/news-events.html>

2.5. Session 3: Perspectives of Exporting Countries

The subsequent panel discussion focused on the Opportunities and constraints for biomass export to the European Union. It was moderated by **Uwe Fritsche (IINAS)** who asked the panelist the following two central questions: (1) What would be the take home message after this workshop?, (2) What should be done next?.

The following people were part of the panel:

- Suani Coelho, Brazilian Reference Center on Biomass (CENBIO), Brazil.
- Bah Saho, ECOWASM Regional Centre for Renewable Energy and Energy Efficiency (ECREEE), Cape Verde.
- Helen K. Watson, University of Kwazulu-Natal, South Africa
- Maria Almeida Aranha, Brazilian Sugar Cane Industry Association, Brussels Office, Brazil
- Tapio Ranta, Lappeenranta University of Technology, Finland
- Jenny Walther-Thoss, WWF, Germany
- Peter-Paul Schouwenberg, RWE Essent, The Netherlands



Figure 4: Panel debate

We had a very lively debate. The main debated points are summarized below.

Summary of the main points discussed:

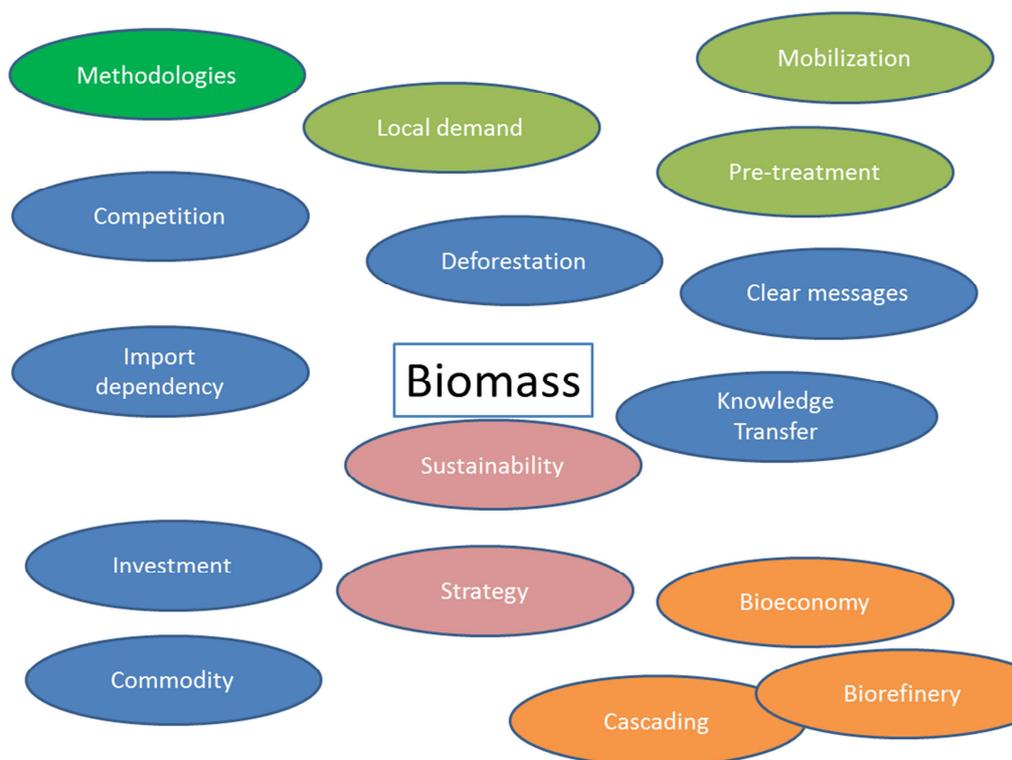
- **Importance of local use of biomass:** if possible is necessary to integrate the local and external demand.
- **Mobilisation is a very important issue** that can be promoted by trade
- **Sustainability is a key issue and therefore the criteria should take into account the real conditions existing in other countries**, thus in certain regions (ie: US and Brazil) is complicated to fulfil the criteria and indicators established at EU level.
- **The multiplication of sustainability criteria in the end work as barriers to trade. The EU should take into account existing criteria/environmental legislation in the exporting countries and work towards some form of equivalence/mutual recognition. Another possibility is to adopt criteria that are elaborated at international level (e.g. GBEP).**
-
- **Biomass cannot be the substitute for everything** (ie: chemicals, fuels for transport, etc.).We have to set the limits.
- **Biomass is not a commodity.** It has to be: affordable, sustainable and durable.
- The sustainable use of biomass is one little step in the way to a low carbon economy
- **A clear and stable regulatory & policy framework is required**

2.6. Session 4: Results of BioTrade2020plus

The last session was moderated by **Inés del Campo (CENER)** and focused on the presentation of the current version of the interactive online tool and the main conclusions extracted from the workshop.

Gert-Jan Nabuurs (Alterra/Wageningen University and Research) presented the interactive BioTrade2020plus tool for biomass imports to the EU.

Finally **David Sánchez (CENER)** closed the workshop presenting the most relevant keywords extracted from the presentations:



3. BioTrade2020plus Consortium

CENER – National Renewable Energy Centre, Biomass Department, Spain

Project Coordinator BioTrade2020plus

Contact persons: David Sánchez González & Inés del Campo Colmenar

Imperial – Imperial College London, Centre for Environmental Policy, United Kingdom

Contact persons: Dr Rocio Diaz-Chavez

DLO – Alterra, Wageningen University and Research, The Netherlands

Contact persons: Dr Gert-Jan Nabuurs & Dr Berien Elbersen & Dr Wolter Elbersen

IINAS – International Institute for Sustainability Analysis and Strategy GmbH, Germany

Contact person: Leire Iriarte & Uwe Fritsche

VITO - Flemish Institute for Technological Research, Belgium

Contact persons: Luc Pelkmans

UU - Utrecht University, Faculty of Geosciences, Energy & Resources, Copernicus Institute of Sustainable Development, The Netherlands

Contact persons: Dr Martin Junginger & Thuy Mai-Moulin

WIP- WIP Renewable Energies, Germany

Contact persons: Dr Rainer Janssen & Dominik Rutz



4. Appendix 1: Workshop programme

International Workshop

Towards a European Trade Strategy for Sustainable Solid Biomass Imports to the EU

14th June 2016

Permanent Representation of Spain & Delegation of Navarra
Boulevard du Régent 52/Regentlaan 52, Brussels, Belgium



Co-funded by the Intelligent Energy Europe Programme of the European Union



Workshop Description

We cordially invite you to join this workshop organised by the BioTrade2020plus project with the participation of the Biomass Policies project. The workshop takes place in the framework of the **European Sustainable Energy Week (EUSEW) 2016**.

Targets of the European Union on **solid biomass** (pellets, woodchips, torrefied biomass, pyrolysis oil) imply that the use of domestic and cost-competitive solid biomass potentials need to be promoted. However, Europe will also need sustainable and cheap imports of solid biomass from non EU countries. Some well-positioned regions of the world are already biomass suppliers for the European markets and therefore could become increasingly relevant in the near future.

One of the objectives of the **BioTrade2020plus** project has been to propose appropriate long-term strategies and support frameworks which can form a basis for a balanced approach between promoting the use of EU domestic solid biomass, while also keeping markets open for sustainable imports of solid biomass. In addition to the BioTrade2020plus project, the **Biomass Policies** project aims to develop integrated policies for the mobilization of “resource efficient” indigenous bioenergy ‘value chains’ in order to contribute towards the 2020 bioenergy targets set within NREAPs & 2030, and other EU27/ national policy measures.

Both projects address critical bottlenecks related to the use of solid biomass in order to promote renewable sources and achieve the Common European targets established for 2020 and 2030 and to move to a low carbon economy for 2050.

This workshop will inform you about the potentials of solid biomass in the EU and of sustainable imports from non EU countries to Europe. You will have the opportunity to directly discuss trade strategies with stakeholders from **Europe, Latin America, Africa, and Asia**.

Programme

08:30-09:00 Registration

Session 1: Overview on Solid Biomass Developments

Moderation: Dominik Rutz, WIP Renewable Energies, Germany

09:00-09:20 **Welcome and introduction to BioTrade2020plus project**

DAVID SANCHEZ, Centro Nacional de Energías Renovables (CENER), Spain

09:20-09:40 **Towards a EU bioenergy sustainability policy for the period after 2020**

European Commission, Belgium

09:40-10:00 **International developments on the production and use of solid biomass**

HEINZ KOPETZ, World Bioenergy Association (WBA), Austria

10:00-10:20 **Biomass potentials: Sustainability issues**

ROCIO DIAZ-CHAVEZ, Imperial College, UK

10:20-10:40 **Strategies and policies in two projects: BioTrade2020+ and Biomass Policies**

LUC PELKMANS, Flemish Institute for Technological Research (VITO), Belgium

10:40-11:00 *Coffee Break*

Session 2: Potentials of Exporting Countries: Case Studies

Moderation: Martin H. Junginger, Utrecht University, The Netherlands

- 11:00-11:10 **Overview on the BioTrade 2020plus Case Studies**
MARTIN H. JUNGINGER, Utrecht University, The Netherlands
- 11:10-11:20 **United States**
GERT-JAN NABUURS, Alterra / Wageningen University and Research, The Netherlands
- 11:20-11:30 **Colombia**
WOLTER ELBERSEN, Wageningen University and Research, The Netherlands
- 11:30-11:40 **Brazil**
LOTTE VISSER, Utrecht University, The Netherlands
- 11:40-11:50 **Ukraine**
LOTTE VISSER, Utrecht University, The Netherlands
- 11:50-12:00 **Kenya**
THUY MAI-MOULIN, Utrecht University, The Netherlands
- 12:00-12:10 **Indonesia**
THUY MAI-MOULIN, Utrecht University, The Netherlands
- 12:10-12:30 Discussion
- 12:30-13:30 *Lunch*

Session 3: Perspectives of Exporting Countries

Moderation: Uwe Fritsche, International Institute for Sustainability Analysis and Strategy (IINAS), Germany

13:30-14:45 Panel debate: Opportunities and constraints for biomass export to the European Union

Panelists:

- SUANI COELHO, Brazilian Reference Center on Biomass (CENBIO), Brazil
- HELEN K. WATSON, University of Kwazulu-Natal, South Africa
- BAH SAHO, ECOWAS Regional Centre for Renewable Energy and Energy Efficiency (ECREEE), Cape Verde
- GERALDINE KUTAS, Brazilian Sugar Cane Industry Association, Brussels Office, Brazil
- PETER-PAUL SCHOUWENBERG, RWE Essent, The Netherlands
- JENNY WALTHER-THOSS, WWF, Germany
- TAPIO RANTA, Lappeeranta University of Technology, Finland

Session 4: Results of BioTrade2020plus

Moderation: Ines del Campo Colmenar, Centro Nacional de Energías Renovables (CENER), Spain

14:45-15:30 Interactive BioTrade2020plus Tool for biomass imports to the EU

GERT-JAN NABUURS, Alterra / Wageningen University and Research, The Netherlands

15:30-15:45 Conclusion and Next Steps

DAVID SANCHEZ, Centro Nacional de Energías Renovables (CENER), Spain

15:45-16:00 *End of the workshop*

Practical information

Date & Venue:

14th June 2016; **Permanent Representation of Spain**; Boulevard du Régent 52/Regentlaan 52, Brussels, Belgium

Registration:

Participation is free of charge, but registration is required. Please register before 3rd of June through <http://eusew.eu/energy-days/towards-sustainable-european-bioenergy-trade-strategy-2020-and-beyond>

More information:

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BioTrade2020plus:

The main aim of the European project BioTrade2020plus is to provide guidelines for the development of a European Bioenergy Trade Strategy for 2020 and beyond. It shall ensure that imported biomass feedstock is sustainably sourced and used in an efficient way, while avoiding distortion of other markets. BioTrade2020plus is supported by the Intelligent Energy for Europe Programme of the European Commission. The project started in April 2014 and will continue until August 2016. www.biotrade2020plus.eu



5. Appendix 2: Participant List