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The German Business Portal

Bioenergy

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- Industry Overview
- Our Industry in Numbers
- Market Potential
- Market Access
- Distribution Channels and Supporting Institutions

Industry Overview

Biomass has grown to one of the most important renewable energy sources in Germany after growing steadily since the nineties. As a result, the country is Europe's largest consumer of bioenergy and is setting benchmarks especially in innovative technologies.Cellulosic ethanol, gasification, cogeneration and gas processing technologies for the feed-in of biogas into the natural gas grid are being developed in Germany.

Our Industry in Numbers

- Industry turnover 2012: EUR 12.85 billion
- Industry export share in 2011: 17 %
- Approx. 128,000 employees in the bioenergy-related sector

- Biomass share in total energy consumption in 2012: 8.3 %

Market Potential

Since the 1990s, consumption of biomass in Germany has grown steadily. In 2012, bioenergy accounted for 7.0 percent of total final electricity consumption, 9.4 percent of total final heat consumption (91% of total renewable heat) and 5.7 percent of total fuel consumption. The industry has set itself a number of concrete goals for the future: 18 percent of electricity, 15 percent of heat and 13 percent of fuel consumption should be generated from bioenergy sources by 2030.

Market Access

The increases in oil and gas prices over the past years have led to a higher use of bioenergies, like wood pellets, firewood and briquettes in the German home heating sector as well as in applications that combine heat and power, such as biogas, gasification and biomass combustion plants.

The expanding demand for wood has left German companies

increasingly dependent on pellets imported from overseas. A foreign company planning to enter the wood pellet market in Germany, however, must make sure that it offers wood products that fulfil the quality standards based on DIN plus standard (DIN 51731). In the area of biofuels, imports of biodiesel, vegetable oil and ethanol must fulfill the minimum quality criteria defined by DIN EN 14214 and E DIN 51605 standards. In addition, biofuels need a certificate as "proof of sustainability" from an approved sustainability authority in order to be eligible for tax deductions or contracts in Germany. This certificate ensures that biofuels fulfill the sustainability criteria laid down in the German sustainability Ordinance for Biofuel and Biomasse electricity (Biokraftstoff- und Biostrom-Nachhaltigkeitsverordnung). The **German Federal Agency for Agriculture and Nutrition** (BLE) provides information on the certification process and an updated list of the certification bodies in Germany.

Distribution Channels and Supporting Institutions

Commitment and long-term market presence are of utmost importance for German companies in choosing their suppliers. Foreign companies interested in selling wood pellets and briquettes in Germany can look for potential business markets in sector specific b2b markets. The Ministry for Economic Affairs and Energy supports this sector with several instruments and has established a website that contains sectoral information and a list of companies active in the solid biomass and biofuels area.

The **Agency for Renewable Resources** (FNR) is the central advising agency in renewable resources in Germany. Its main function is to support research and development projects and provide information and advice in the field of renewable resources. It also supports the market introduction of products made from renewable resources. Associations like the **Bioenergy Association** (BBE), the **Association of the German Biofuel Industry** (VDB) and the Union for the Promotion of Oil and Protein Plants (UFOP) can also be of great help in finding German

companies looking for
bioenergy suppliers.