



## PFI

A quarterly newsletter for those wanting to keep abreast of the latest pellet fuels industry news.

The Pellet Fuels Institute (PFI) is a North American trade association promoting energy independence through the efficient use of clean, renewable, densified biomass fuel.



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## President's Message

**T**his past year was one of the most difficult our industry has seen. I was very happy to turn the calendar over to a new year and I am optimistic that we will see improvements over the next several months. During hardship it is crucial to remain committed to your industry's trade association. PFI is continuing to work for you to improve opportunities for members and the greater industry.



Scott Jacobs, PFI President

We again have a full government affairs agenda in the year ahead. We continue to utilize Holland and Knight as our contract lobbyist and will work with them to further our presence on Capitol Hill and with the Administration. With the new session of Congress underway and a host of new members serving, it is key for us to cultivate new relationships, particularly with those who sit on committees that focus on issues relevant to our industry. Thanks to the efforts of our Government Affairs Committee, we have assembled a strong legislative program for 2011.

In 2010, PFI made a concerted effort to increase PFI's national presence through representation at industry events and will continue to seek out these opportunities in 2011. In January, John Crouch, PFI Director of Public Affairs, again served as a panelist at the Pacific West Biomass Conference, speaking on PFI's standards program. PFI will be participating in several conferences in 2011 and we're hopeful to have similar speaking opportunities at these and other events in the year ahead.

As your company prepares to participate in tradeshow and other events this year, consider promoting the association by displaying PFI materials in your booth. It's an easy way to showcase the work that we do as a trade association. Contact PFI staff for more information.

Planning for our own annual conference is underway. We'll return to the Sawgrass Marriott Resort and Spa July 26-28, 2011. The

*continued on page 3*

## PFI BOARD OF DIRECTORS

### Executive Committee


President - Scott Jacobs, Ozark Hardwood Products.  
Vice President - Jeff Thiessen, Dansons Inc.  
Sec./Treasurer - Stephen Faehner, American Wood Fibers

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### CALENDAR OF EVENTS

Do you have an item for the Calendar of Events? Email it to [berthiaume@pelletheat.org](mailto:berthiaume@pelletheat.org)

March 2, 2011	PFI Membership Luncheon Salt Lake City, UT
March 2, 2011	Biomass Central Heating Symposium Salt Lake City, UT
March 3-5, 2011	HPBExpo Salt Lake City, UT
May 2-5, 2011	International BIOMASS Conference & Expo St. Louis, MO
July 24-26, 2011	PFI Annual Conference Ponte Vedra Beach, FL

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**President's Letter, continued from page 1**

Conference Committee and staff have begun soliciting speakers based on the feedback from last year's conference and input you have given us on what topics you'd like to see addressed. If you have not been to the conference, make plans to do so this summer. It's truly the best opportunity of the year to connect with members of our industry. Registration will open this spring, but conference information is already posted on the PFI website.

We've reached a key stage with our standards program and have many volunteer members developing an outreach initiative geared toward the education of all of industry-- manufacturers, retailers and consumers. This program will not work without the support of our fuel manufacturers. In order to keep it in our industry's hands we have to support it by signing up. The alternative, very likely a stronger more narrowly defined standard promulgated by the EPA, is simply not an

option. PFI staff and the Standards Committee will provide information on program registration when all program details have been implemented. Expect registration to begin in the spring.

Finally, PFI staff is reaching out to you weekly via email with the *PFI Update*. If you are not receiving these messages, please contact Jason Berthiaume at [berthiaume@pelletheat.org](mailto:berthiaume@pelletheat.org) to be added to the recipient list. These emails provide general association news as well as timely updates on issues impacting our industry.

Scott Jacobs  
[pfipresident@pelletheat.org](mailto:pfipresident@pelletheat.org)



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## January 2011 MARKET UPDATE

### Producer Comments:

"Demand has been good due to the weather, but still too much supply compared to demand." –Northeast

"Terrible market conditions." –Canada

"Markets are not where they should be. Some plants will not survive due to the high cost of raw materials." –Midwest

"Sales have been good. Moving most of 2010 inventory." –Southeast

"This year has been the most positive surprise we have had. Not producing as much, but shipping everything that we can produce." -Northeast

### WOOD PELLETS

(average price per ton, medium to large wholesale customer, FOB plant)

#### United States:

**Northeast:** \$150-200 range. A majority of manufacturers report good to excellent sales volumes and do not anticipate any price trend changes.

**Midwest:** \$135-164 range. Most manufacturers report sufficient access to raw materials and do not anticipate any price trend changes.

**Southeast:** \$120-169 range. Most manufacturers report being equal to or ahead of the previous year, in terms of tons sold. Most report sufficient access to raw materials.

**Northwest & Mountain:** \$125-164 range. Sales volumes range from average to good, with no price trend changes anticipated.

**Canada:** \$185-210 range. Most manufacturers report poor year-to-date sales volumes and being behind the previous year, in terms of tons sold.

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## The View From Arlington - 2010 In Review & A Look Ahead to 2011

By: Don Kaiser, PFI Executive Director

2010 was another very eventful year for both the pellet fuels industry and PFI as both groups continued to grow and mature. Thanks to the work of our members, the dedication of the board and committees, PFI and our industry continued to reach new and exciting heights. Let's take a closer look:

### Government Affairs

PFI's Government Affairs Committee worked diligently to promote and protect the interests of our members and the industry. PFI continued its significant investment in the future of the industry through its government relations program. PFI staff and volunteer leaders worked extremely hard to promote the industry to lawmakers on Capitol Hill and the Administration. We were delighted that many of our member companies reached out to their local and national legislators and hosted plant tours and similar events. In addition, PFI coordinated a series of "Fly-Ins" whereby our members came to Washington, D.C. and met with legislators, members of regulatory bodies, and staff. In 2011, PFI will continue to push for our legislative initiatives, protect and promote our members and the industry, and continue to build on our past successes.

### Membership

Membership continued to be very strong in 2010. PFI membership now stands at 120, including 18 brand new members. We have seen significant increases in both fuel manufacturer and supplier members over the past few years. Our retention rate remains strong and we continue to add members. In light of the economic conditions, we are very pleased that our members see the value of membership in PFI. We say "thank you" to all of our members for their dedication and unwavering support of PFI. In addition, it has been very gratifying to see many of our new members

becoming involved in PFI and taking leadership roles within committees. The participation of our member companies within PFI is engine that drives the organization. There are powers in numbers, so if you know a company that should belong to PFI, tell them to join.

### Finances

Revenues were strong in 2010, fueled in part by a very successful annual conference. The strong revenue allowed PFI to continue to expand its programs and services. Staff continued to manage expenses very closely. The 2011 budgeting process was thorough and complete. The PFI Board of Directors has set a conservative and prudent financial course for PFI for 2011. In short, PFI continues to remain financially strong as we enter 2011.

### Standards

Following notification from EPA that it would require the standardization of pellets through its New Source Performance Standard (NSPS) for Residential Wood Heaters, PFI determined that it would modify its current standards program to fulfill the requirements outlined by EPA. The Standards Committee went to work

*continued on page 7*

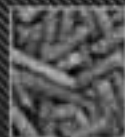
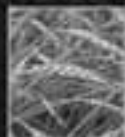
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**View from Arlington, continued from page 5**

on editing the program that was released to the industry in 2008. The Committee reached out to industry for feedback and revamped the program to include a third party certification process. EPA is pleased with this new program and hopes to see it gain traction within the industry so that it can insert it in its NSPS, rather than create its own standards program. Program documents continue to be edited and it is expected that the program will be launched soon.

**EXPO 2010**

Hopefully, you all were in Orlando last March for the PFI Annual Membership Luncheon held in conjunction with HPBA's Expo. PFI had a tremendous turnout for the luncheon and drew participants from all spectrums of the pellet industry. At Expo, we promoted the pellet industry and spread the word about PFI. Pellet supporters showed their allegiance by wearing PFI blinking pins. PFI bags, pens, and other giveaways were extremely popular and heightened PFI's profile. Expect more great things in Salt Lake City in March.

**Annual Meeting**

The PFI Annual Conference was held July 18th-20th at the historic Grove Park Inn in Asheville, North Carolina. We were delighted that 270 attendees and 55 exhibitors from 150 companies came together for a great blend of education, networking and, of course, golf. In addition, many attendees took advantage of the location by spending a few extra days in the beautiful mountains of western North Carolina for site-seeing, hiking, golfing and relaxing at the spa and pool.

The Conference Committee put together an educational program that was truly impressive. The attendees rated the entire conference very high. In these economic times, many conferences are seeing significant declines in both attendees and exhibitors. The dedication of our members and supplier exhibitors to continue to support PFI and attend its annual confer-

ence is inspiring. We will continue to make the conference even better in 2011. We look forward to seeing you at the Sawgrass Marriott in Ponte Vedra Beach, Florida July 24th-26th.

**Website**

PFI's website was totally redesigned in 2010 to make it more user-friendly and to be more interactive with our members, consumers, and the press. Thanks for all of the positive feedback. You can also follow PFI on Twitter and Facebook.

2010 was an extremely challenging and exciting year for PFI and the pellet industry. We look forward to the opportunity to continue to serve you in 2011.

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## Standards Committee Update

Since our last Standards Committee update we have received word through informal conversations with Gil Wood of the U.S. EPA that the EPA is pleased with the standards program that PFI has produced and intends to include it as the preferred option for regulating pellet fuel quality as part of EPA's NSPS for residential wood heaters. With this vote of confidence, the Committee has been actively engaged in solidifying an agreement with an accreditation body to implement and enforce the program. Our primary option is the American Lumber Standards Committee (ALSC). ALSC is currently the accreditation body for four other industry quality programs including white lumber, treated lumber, pallets, and packaging for export. ALSC is very experienced in managing similar systems.

In December 2010, PFI staff, as well as Standards Committee co-chairs Scott Smith and Chris Wiberg, met with ALSC representatives to discuss the details of a relationship between PFI and ALSC. While it is apparent that some wording modifications will be necessary to merge PFI's program with ALSC's processes, these modifications are largely semantics and do not fundamentally change the program. It is, therefore, our hope that PFI and ALSC will soon solidify an agreement in which ALSC will serve as the accreditation body for PFI's standards program.

On a different note, the Standards Committee is interfacing with PFI's Promotions Committee through the development of a standards/promotions subcommittee. The intent of this subcommittee is to bring members of both committees together to spread the word about PFI's standards program. In addition, the Committee is actively engaged in identifying speaking opportunities as well as write-ups in publications to get the word out.

Finally, there is one missing element that EPA and the industry as a whole needs to see regarding this program - a demonstrated commitment by fuel producers to adopt this program. The Standards Committee is working on the development of a non-binding letter of intent that producers can sign to indicate that they intend to sign up once the program is open for enrollment. More information about this effort will be available in the weeks ahead.

Chris Wiberg  
*chris.wiberg@twinportstesting.com*

Scott Smith  
*ssmith@shawresources.ca*

Standards Committee Co-Chairmen

## Fuel Availability

**Retailers:** For the most up-to-date listing of manufacturers with uncommitted inventory, visit the "**Fuel Availability**" link on [www.pelletheat.org](http://www.pelletheat.org).

**Pellet Manufacturers:** To update your fuel availability status between surveys, please email [pfimail@pelletheat.org](mailto:pfimail@pelletheat.org) with company name, location, contact name, and phone number.

## Conference Committee Update

The Conference Committee has met regularly over the last few months and has focused on the planning of two events: the annual PFI Membership Luncheon and the PFI Annual Conference.

The Conference Committee has assembled a strong agenda for the luncheon, highlighting areas that remain essential to the growth of our industry: industry data reporting, government affairs and standards. More information on the luncheon, including the program presentations, can be found under the Events section of the PFI website.

This summer, the PFI Annual Conference will return to the Sawgrass Golf Resort and Spa. Many of you joined us during our first visit to Sawgrass in 2009, at what proved to be a dynamic conference. It's a beautiful location with a long list of amenities that the entire family will enjoy. Sawgrass has assembled a comparable package for our 2011 conference and we look forward to providing you with more details in the months ahead.

In the past few months, the Committee has reached out to PFI membership to learn what topics members would like to see covered at the 2011 conference. It continues to be the goal of the Committee to assemble a timely conference program driven by the needs of the industry. To that end, the Committee will release a call for abstracts related to specific topic areas and will welcome input on new concepts as well. We appreciate your feedback and encourage you to submit an abstract.

Registration for the conference will begin soon, but save the dates of July 24-26th and plan to join us.

Stephen Faehner  
[sfaehner@awf.com](mailto:sfaehner@awf.com)

Scott Smith  
[ssmith@shawresources.ca](mailto:ssmith@shawresources.ca)

Conference Committee Co-Chairmen



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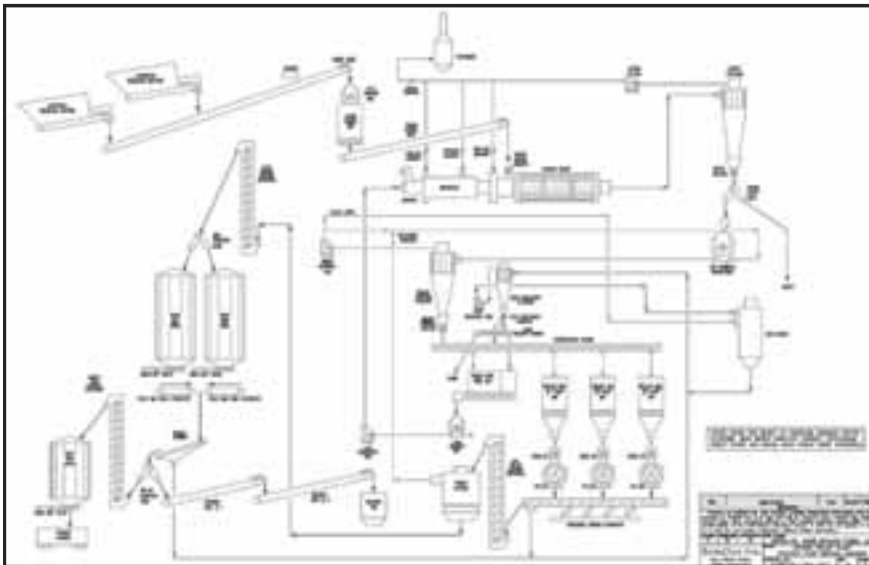
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With a combined circulation of approximately 2,800, the newsletter reaches members of the pellet industry, the larger biomass fuel industry, and the hearth industry. Ads are on a space-available basis, with PFI members receiving priority. Ad sizes include full page, half page, and quarter page. Advertisers can place their ad on an issue-by-issue basis, or can sign up for a full year at an average savings of 15-20%.

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## Image of the Issue

In November, 2010, PFI staffers Jennifer Hedrick and Jason Berthiaume visited O'Malley Timber Products, a PFI member, located in Tappahannock, VA. They met with Todd O'Malley and toured the facilities with plant Manager George Winder (center).

If you have an image for an upcoming issue, share it with the PFI staff.



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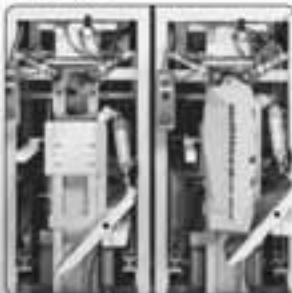
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## Harvesting Forest Renewables Sustainably

By: Mike Schmidt, Manager of Forestry Renewables,  
John Deere Construction & Forestry Division

### *Reprinted with permission from the February 2011 Issue of Biomass Power & Thermal*

*Harvesting woody biomass is 'preventive medicine' for our forests and just what the doctor ordered for timber-dependent communities.*

The solution to some of America's most pressing environmental, energy and economic challenges can quite literally be found at our feet.

Sustainable harvesting of forest renewables (woody biomass) is "preventive medicine" for our forests, helping limit the number and severity of forest fires, reducing the habitat of destructive insects to help ensure that the healthiest trees thrive, and promoting the growth of healthier, stronger trees. In addition, it offers struggling communities a much-needed, new revenue stream and other social benefits.

As an energy source, forest renewables may still be relatively new, but they have unlimited potential. Forest renewables come from several sources, including:

- Residues and byproducts from wood processing mills and pulp and paper mills.
- Residues from logging and site-clearing operations.
- Biomass from fuel treatment operations to reduce forest fires.

The USDA and the U.S. DOE estimate 368 million dry tons of sustainably removable biomass can be produced from U.S. forestlands per year.<sup>1</sup> Harvesting it represents substantial environmental, social and economic opportunities, particularly for rural forestry communities.

### **Fewer and Less Catastrophic Forest Fires**

Excessive dead, dry material that has accumulated in our forests poses significant wild land fire risks. Over the past 10 years, these fires have consumed more than 49 million acres of forest in the United States alone, and federal agencies have spent more than \$8.2 billion fighting them. Removing forest renewables could help save

millions of acres of forest and billions of taxpayer dollars spent battling forest fires.

According to Danny Dructor, executive director of the 10,000-member American Loggers Council, harvesting forest renewables can go a long way toward reducing that destruction and expense.

"The impact of forest fires is greatest in the Western states," he points out. "If we could take that biomass off the forest floor, the understory and small-diameter trees that really have no market value as timber, we could reduce the fuel that feeds those fires. And I'm convinced we could reduce the number and the severity of the catastrophic wildfires that we're seeing."

### **Reduced Insect Infestation**

In addition to decreasing fuel for potential fires, harvesting forest renewables also reduces habitat and food for destructive insects such as the mountain pine beetle, which thrives in overstocked areas and kills healthy trees.

According to the U.S. Forest Service, 2.5 million acres of pine trees in Colorado and Wyoming were affected by the mountain pine beetle epidemic between 1996 and 2008.<sup>2</sup> The Natural Resources Defense Council also released a report in July on the dead and dying high-elevation forests in Idaho, Montana and Wyoming. Within these regions, aerial photographs have documented 1 million acres of whitebark pine forest dead or dying from the mountain pine beetle and, to a lesser extent, an invasive fungus. One of the report's authors, Wally Macfarlane, has stated that another million acres of whitebark pine forest are at risk.<sup>3</sup>

Harvesting forest renewables can not only reduce insect food and habitat, but it can also thin forests to promote the growth of healthier trees, which are better able to resist infestation, grow to their full potential and contribute to a healthier environment.

### **Compatible With Forest Service**

Recognizing the value of sustainable harvesting of forest renewables, the U.S. Forest Service began implementing its Woody Biomass Utilization Strategy<sup>4</sup> in 2008. The program

*continued on page 16*

### *Harvesting Forest Renewables, continued from page 15*

includes harvesting dead trees in 19,000 acres of forests to help reduce the threat and impact of wildfires and prevent further spread of beetle infestation.

Cody Neff, owner of West Range Reclamation of Crawford, Colo., is happy to be part of that strategy. Neff has been involved in ecosystem management for more than 10 years, working with a wide variety of federal, state and environmental agencies such as the National Park Service, the Bureau of Land Management, Colorado's Division of Wildlife and State Forest Service and the Nature Conservancy. In 2009, the Forest Service awarded his company a 10-year forest stewardship contract that includes reducing hazardous biofuels in Colorado's Arapaho, Roosevelt and Pike-San Isabel National Forests.

"Most of our forests are dangerously loaded with hazardous fuels, including understory and beetle-infested trees," Neff says. "Wildfire has historically played an essential role in the natural development of our Western ecosystems, but today's wildfires are not those of the past. They are much more dangerous and devastating. Unhealthy forests are also much more susceptible to disease and insect epidemics, which in turn create even more fuel for wildfires. Sound forest management, including sustainable harvesting of renewables, can help conserve the Western landscape that we all value so much.

Neff has personally witnessed the positive effect this harvesting can have in limiting a forest fire. "A fire broke out near Boulder, Colo., just two weeks after we had removed diseased trees and understory from what had been a particularly dangerous area," he says. "The fire had escalated into the canopy, but when it reached our treatment area, the limited understory enabled firefighters to put it out. It was more than gratifying to see the good that had resulted from our work—the forest that was saved because of it."

### **Economic and Social Benefits**

Harvesting and converting forest renewables to energy can provide a solution to some of the country's most pressing economic and energy challenges. These benefits start by making use

of logging slash, which is typically left to waste on the forest floor or simply collected and burned. An associate professor of forest operations at Auburn University's School of Forestry and Wildlife Sciences, Tom Gallagher has studied the issue and understands its short- and long-term potential.

"The 'low-hanging fruit' right now is logging slash," Gallagher explains. "Millions of tons of this material are available every year without impacting other markets, and it only makes sense to capitalize on this opportunity. Is woody biomass really something we can use to produce energy in a sustainable way? Absolutely. Further research is needed to make biomass harvesting and processing more efficient. But I have all the confidence in the world that with collaborative efforts by all the stakeholders—government, landowners, loggers and markets—we can make world-changing use of this sustainable material."

The ALC's Dructor sums up the problem and the opportunity this way: "Most timber-dependent small communities are facing upwards of 20 percent unemployment. By developing energy from woody biomass, we can create new markets, new opportunities and new jobs. We can revitalize rural economies and help kids who are growing up in small communities remain in those communities by providing high-paying jobs."

Healthy forests rely on sustainable forest management, which includes the removal of excess biomass. Sustainable harvesting of forest renewables represents an important new step in the overall strategy of sustainable forest management.

### **Notes:**

<sup>1</sup>*Biomass as Feedstock for a Bioenergy and Bioproducts Industry: The Technical Feasibility of a Billion-Ton Annual Supply, U.S. DOE and USDA, 2005.*

<sup>2, 4</sup>*U.S. Forest Service Woody Biomass Utilization website, [www.fs.fed.us/woodybiomass](http://www.fs.fed.us/woodybiomass)*

<sup>3</sup>*Macfarlane/Logan/Kern. Using the Landscape Assessment System (LAS) to Assess Mountain Pine Beetle-Caused Mortality of Whitebark Pine, Greater Yellowstone Ecosystem, 2009: Project Report, 2010.*



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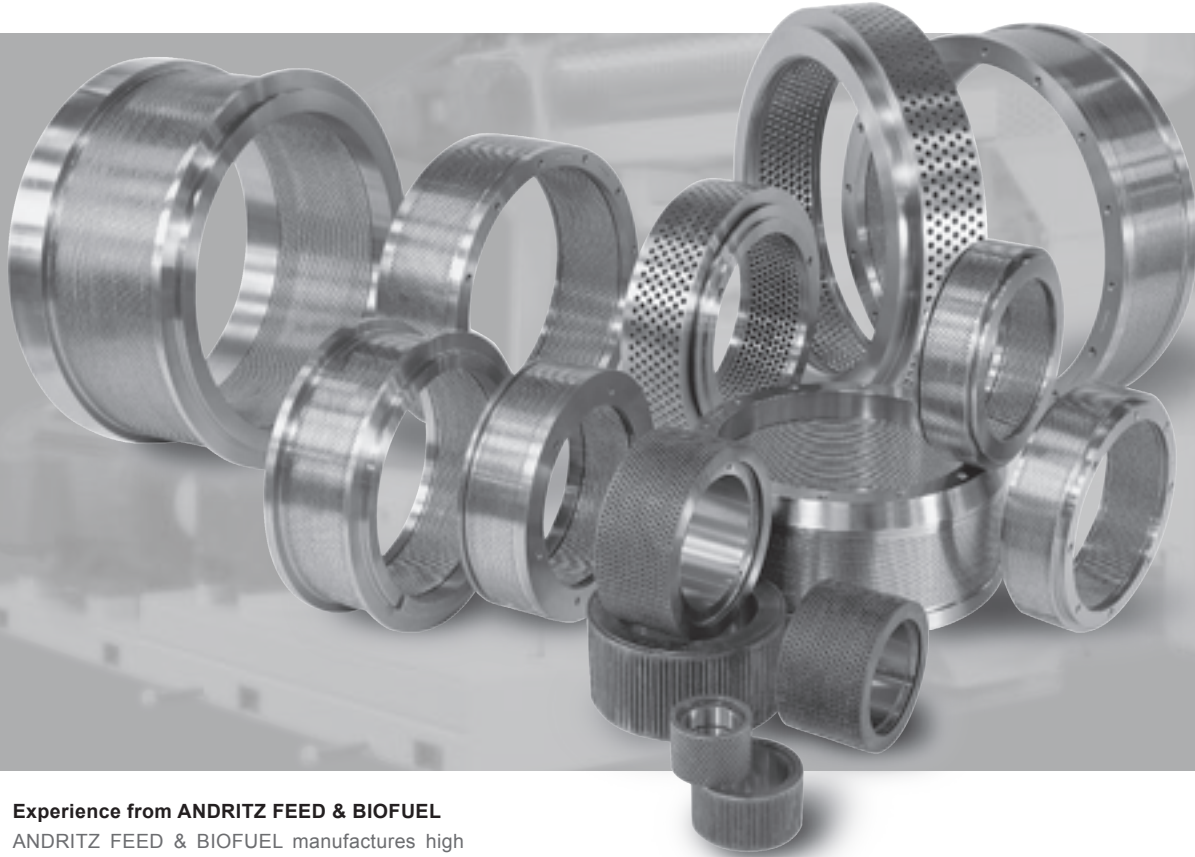
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