

# PELLET FUELS INSTITUTE

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PFI

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

Primary focus includes the wood pellet industry (both industrial and residential markets) as well as the newly emerging field of process engineered fuels for industrial use (sometimes referred to as refuse derived fuel or paper).

- **February Market Update, page 4**
- **Pellet Appliance Review 2007, page 7**
- **The View from Arlington, page, 13**
- **Standards Overview & Update, page 16**

## President's Letter- Bruce Lisle

**N**ow That That's Over. After over fifteen years in the industry, I thought I had seen almost every market dynamic possible. Last season's winter probably topped out the "Weird-O-Meter." There were shortages in the west, and surpluses in the east caused by a winter that almost didn't arrive and the guts of several players to haul and stockpile huge amounts of fuel from the west to the east. What happened last winter was purely free market driven. Shortages the year before spurred shipments to east this last season and western producers were happy to accommodate as pre-season orders from western retailers were slow. What happens this year is anyone's guess, but conventional wisdom would say that western retailers, historically used to just in time ordering, will be ordering early. Residual inventory will get the industry started in the East this year, and there is new capacity in the east. The wild card is oil prices. Gasoline is averaging over \$3 per gallon as I write this, and rumors have that hitting \$4 per gallon by fall. Without an election this year, gasoline and fuel oil prices might more closely track each other. So, consumer interest in pellet appliances might spike up again this season. There is another wildcard. There were record manufacturer shipments of pellet appliances last year, a large amount that is still sitting in retailer inventories that will be sold. And there will be more new stove shipments. So, depending upon the oil market and the timing and the amount of heating degree-days, we could be looking at another record setting year.

I regularly get asked what can PFI do about alleviating shortages or managing markets so that shortages do not occur. The answer is that PFI cannot "manage markets." All we can do is provide information to our members, consumers, and retailers about market conditions. After that it is a free and competitive market. We set up various meetings and forums each year, publish a newsletter, maintain a website, and answer lots of phone calls. In my opinion, good business planning and information alleviates a lot of supply concerns.

I usually take the Vesta Awards at the HPBA Expo with a grain of salt because Richard usually takes our industry to task when he has the microphone. He is getting better. But forgetting his editorial remarks, this event proves that an "unknown" can immediately be put in the industry spotlight. This year, Snoqualmie Stove Works won a Vesta for its SNQ-1 Radiant Heat Pellet Stove. It could have won Best-in-Show. Snoqualmie Stove Works, is a first time exhibitor. Walking the outdoor burn area, I did a major head twist going by their booth. From an idea, and I understand the spouse of the inventor had the idea, to taking home a piece of granite in front of the whole hearth industry. The Vesta Awards are a great incentive to develop new products, and the judges are tough, not making awards where the innovation is not substantial. Sherwood Industries won for its new multi fuel burn system. Last year, Quadra-Fire won Best-In-Show with its advanced technology Mt. Vernon Insert. This is all good news as appliance manufacturers have been listening to the fuel industry, that more fuel friendly appliances are going to be the trend into the future. Another trend I saw at Reno, was the reemergence or addition of pellet appliances into many more manufacturer's product lines. After the drop in number of pellet appliance

*Continued on page 3*

## **PFI BOARD OF DIRECTORS**

### **Executive Committee**

President - Bruce Lisle, Energex Pellet Fuel, Inc.

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Don Kaiser, Executive Director

John Crouch, Director of Public Affairs

Tom Stroud, Senior Manager of Codes & Standards

Denise McDonald, Administrative & Membership Coordinator

# TWIN PORTS TESTING

## **CALENDAR OF EVENTS**

**July 19, 2007**

**PFI Board of Directors Meeting  
Pinehurst Resort  
Pinehurst, NC**

**July 19-21, 2007**

**PFI Annual Conference  
Pinehurst Resort  
Pinehurst, NC**

**Feb. 28 -  
March 1, 2008**

**HPBExpo  
Georgia World Congress Center  
Atlanta, GA**

# L A I D I G A D

### **DISCLAIMER**

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### President's Message continued from page 1

manufacturers in the late nineties, now there is a substantial increase in players in the market. This is a major indicator of the health of this business.

The PFI membership luncheon at Reno broke another attendance record with 195 people joining us for lunch. The Honorable John Peterson, Congressman from the 5th District of Pennsylvania, spoke via telephone and did a Q&A session with attendees. One of the points that he stressed is that the major threat to this country is not terrorism, but this country's dependence on foreign sources of energy. The Honorable Max Sandlin, a former Congressman from Texas who is with Fleishman-Hillard, our government relations firm, also spoke to the group. Don Johnson, HPBA Director of Market Research, presented appliance shipment data for 2006. Pellet stove shipments grew again last year, but he analyzed quarterly data that reflected the major drop in the fourth quarter due to the unseasonably warm fall and early winter.

Our annual meeting is scheduled for July 19-21 in Pinehurst, North Carolina. The Standards Committee, with its various sub-committees, has been working very hard this year to bring to Board in July a major standards revision. This will be discussed in detail at the annual meeting. I encourage all members and potential industry members to attend and join this discussion. The revisions could be substantial and could include an industry wide quality assurance and control program. There has been substantial dissertation about whether we should publish a "super premium" standard, so this will be the place to discuss it. Another big event will be a presentation by Richard Wright, the editor of *Hearth and Home* magazine. Richard will be joining us for the first time. See you all in Pinehurst!

## Your PFI Homework Assignment for August!

By John Crouch, PFI Director of Public Affairs

Congress has just returned from their spring vacation and is back in session until Memorial Day. This means it's the right time to be planning a visit by your Representative or Senators to your plant in August. Not all pellet plants are major employers, but you employ people in some pretty rural areas, where there are not a lot of new jobs, and I'll bet your county commissioners will help you get your invitation through to your Senator. Besides, right now everyone in Congress is interested in alternative energy. It's a "hot" topic. Here are some steps to take, RIGHT NOW, if you want to get on their August calendar.

1. Contact either your local county commissioner or some other important local politician.
2. Ask their help in arranging a visit to your plant during the

August recess (start with your Senator's office, and then the Congressperson).

3. Send a written invitation and copy Don Kaiser at PFI (so that the PFI lobby team can help with their end).

4. Don't turn down anyone! Even if the person attending turns out to be a staff person -Go For It! (again, alert PFI to the visit)

5. Plan the visit carefully. You want to be sure to have a commercial quality photographer, and also –

- lunch, cooked on a pellet barbeque, of course,
- several units burning. Contact some of your nearby customers to help with the "Iron", it's good to get them involved,
- a mason jar of pellets, with a label indicating how many jobs--both direct and indirect-- your mill creates in that area,
- a press release to the local newspapers announcing the visit.

6. Following the visit, make sure you send another press release and a copy of the photo to all the papers in your area.

7. Send a thank-you, with a copy of the photo, (framed would be nice) to their office in D.C. and to their local district office.

8. Send a copy of everything to PFI.

Sounds like a lot of work, but it's not, and besides, how important is the Renewable Energy Security Act (RESA) to you!

If you're a PFI member who makes appliances, the same scenario applies. For example, Quadra-Fire has had 2 Congressional Reps to their plant.

Even if you're a pellet retailer, try for your local State Senator or State Assembly person. Point out to them that some states are beginning to exempt pellet stoves from

the state sales tax in order to encourage this "Home Grown" Energy source. If you sell pellet barbeques, then call the office of a local politician who you admire and volunteer to help cook at their next outdoor fund raiser! Even if you only cook a token amount of the food, you know the pellet grill will be an intriguing part of the mix.

The first step, in all of this, is to pick up the phone, and get started now, for an August event. Let PFI staff know how it's going and

maybe we'll publish a "score-card" in the next newsletter. If every PFI member took this seriously, we could impact almost 200 politicians this year.

Your homework assignment is due on September 1!



Charlie Page with Representative Welch

## FEBRUARY MARKET UPDATE

### Producer Comments:

“Until the housing market slump is over, raw material in the West is scarce and expensive.” - Southwest

“Warm spring weather has slowed sales, but early-buy pressure is very strong.” – Northwest

“Great 06/07 Season- 07/08 promises to be even better.” – Midwest

“Product is not moving with great consistency” – Southeast

“Wet fall and spring makes for a poor lumber market, could slow production.” - Northeast

### WOOD PELLETS

#### United States:

**Northeast:** \$130-\$185 range. Sales volume is reported by manufacturers to be between average and good with most manufacturers reporting sufficient access to raw material.

**Midwest:** \$125-\$189 range. Most manufacturers do not anticipate any price trends with adequate raw material availability.

**Southwest:** \$135-\$159 range. Reporting manufacturers state that their year-to-date sales volume is anywhere from poor to excellent.

**Southeast:** \$125-\$150 range. Most manufacturers anticipate an upward price trend and that sales are behind in comparison to last year.

**Northwest & Mountain:** \$135-\$159 range. With most plants running at 100%, most manufacturers report that there is sufficient raw material.

**Canada:** \$175-\$185 range. Manufacturers report sales are the same or ahead of last year with plants running between 75%- 90%.

# PREMIER TECH AD

# HAMER AD

## PFI 2007 Annual Conference

This years' PFI annual conference will be held in historic Pinehurst, North Carolina, at the Pinehurst Resort, July 19-21. Meetings and events will be held in the main building, the world renowned Carolina Hotel. The Carolina Hotel has 210 guest rooms and 12 suites featuring traditional, yet comfortable décor, with golf and historic memorabilia. It's a stately Southern icon situated at the end of the tree-lined Carolina Vista Drive. The iconic five-story building with a copper-top cupola and expansive green lawn has been called "The Queen of the South" and the "White House of Golf."



*A ClubResorts Destination*

## Program Info

The annual conference will bring you a combination of fantastic educational sessions, networking opportunities, and social events. It is the industry's once-a-year opportunity where manufacturers and suppliers can meet and learn about new developments in technology and discuss the variety of ways to grow the marketplace for renewable energy.

Highlights of the program include:

- European Conference Update

- Exporting Fuel to Europe
- Government Relations Update
- Carbon Credits
- Retailers & Pellets: The State of the Relationship Today
- Fuel Standards

## Golf Tournament & Hiking Tour

The annual PFI Golf Tournament will be held in the morning on Thursday, July 19, at the Pinehurst #5 course. As a world-renowned golf destination, Pinehurst has hosted more golf championships than any other place in America. Designed by Ellis Maples in 1961, No. 5 holds true to a key Ross feature - Mother Nature as the best guide in golf architecture. The course has more water hazards to negotiate than any other course at Pinehurst and has a lot of variety in the layout - uphill and downhill, left-to-right and right-to-left, long and short par fours. The playable Pinehurst No. 5 will be sure to continue the tradition of good times and friendly competition at this annual event. Golfers of all skill levels are encouraged to participate.

For non-golf enthusiasts we will be offering a guided hiking tour of the Uwharrie National Forest. Members and guests will be amazed by the variety of scenery which could include streams, rocky climbs, old home sites, cemeteries, and gold mines.

Please visit our website, [www.pelletheat.org](http://www.pelletheat.org) for more information or fill out and return the registration form included in this newsletter.

**PELLET FUELS INSTITUTE  
2007 Annual Conference  
July 19-21, 2007  
Pinehurst Resort  
Pinehurst, NC**

**REGISTRATION FORM**

**Meeting, Hotel and Golf Reservation Deadline: June 16**

**For hotel reservations (single/double rate \$198), please fill out the Pinehurst Resort hotel reservations form and return directly to Pinehurst at (910)235-8240.**

**MEETING REGISTRATION**

Company/Organization: \_\_\_\_\_

Attendee(s): \_\_\_\_\_  
\_\_\_\_\_

Address: \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ Email: \_\_\_\_\_

**GOLF TOURNAMENT REGISTRATION** (spouses and guests invited and encouraged to play)  
\$140 fee includes greens fees, cart and boxed lunch.

Rental clubs are available (for an additional, on-site payment). Please circle Y (yes) if you plan to rent clubs.

Name \_\_\_\_\_ Handicap/Avg. Score: \_\_\_\_\_ Club Rental (Y / N)

Name \_\_\_\_\_ Handicap/Avg. Score: \_\_\_\_\_ Club Rental (Y / N)

Name \_\_\_\_\_ Handicap/Avg. Score: \_\_\_\_\_ Club Rental (Y / N)

(On-site golf registrations cannot be accommodated. Please pre-register.)

REGISTRATION TYPE	Number	Fee per person	Subtotal
(Registration includes conference meetings, lunch, continental breakfast and Friday evening dinner)			

PFI Member	_____ x	\$290	\$ _____
Spouse/Guest Member	_____ x	\$215	\$ _____
Non-Member	_____ x	\$390	\$ _____
Spouse/Guest Non-Member	_____ x	\$265	\$ _____
*Golf Registrations	_____ x	\$120	\$ _____
*Golf Alternative -Hiking	_____ x	\$70	\$ _____
*Tours Includes Box Lunch		<b>TOTAL</b>	\$ _____

Enclosed is my check for \$ \_\_\_\_\_ made payable to: Pellet Fuels Institute (US funds/US bank only)

Please charge my credit card \_\_\_\_\_ MasterCard \_\_\_\_\_ Visa \_\_\_\_\_ American Express

Credit Card # \_\_\_\_\_ Exp. Date \_\_\_\_\_ (Please PRINT numbers clearly)

Billing Address and Zip Code \_\_\_\_\_

Card Holder Name \_\_\_\_\_ (PRINT NAME CLEARLY)

Signature \_\_\_\_\_

**Return to: Denise McDonald, Pellet Fuels Institute, 1901 N. Moore Street, Suite 600, Arlington, VA 22209  
Or via Fax: (703) 522-0548**

Cancellation/Refund Deadline: Refunds for meeting and golf will be made only if a written request is received by June 16, 2007. After that date, no refunds will be made. You are responsible for canceling your own hotel reservation.

*If you have special dietary or handicap needs, please contact a member of the PFI Staff*

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**DUPPS AD**

## Pellet Appliance Review 2007

By Mel Monk, Custom Hearth, Inc.

This year's HPBExpo made it evident that the majority of the pellet appliance manufacturers have seen the light and realized that the time for innovation and creativity has arrived. The days of a new model having a larger ash container, improved window air-wash, prettier paint or trim package, as the yearly major upgrade are gone. Anyone wishing to compete in the new market understands that a move into bio-mass, multi-combustion technology will be leading the way as the pelletized fuel market evolves, expands and encompasses new fuel sources.

The "phase one" period of development has set the stage for being part of the Green Energy, Alternative Energy excitement that is spreading across the country. "Phase two" will include the many new shapes, sizes and concepts, indoor and outdoor placed heaters, and artistic, sculptured units to compete with gas. HPBExpo introduced us to a group of outstanding designers with obvious engineering backgrounds and a creative eye. Thank you for pushing the envelope either as one of the majors or as one of the new start-up companies.

Yes, we had a pellet fuel shortage on the West Coast this season, but the winter was colder and longer than normal and the consumer has not stockpiled and prepared. It must be a wake-up call for next year. After twenty years of using pellet fuel and seeing the industry go through "fits and starts," I believe we can get it right.

Pellets were not the only fuel in short supply. After a huge wind storm, electricity was out for days in Washington and Oregon and the situation was even worse for some of the propane vendors. Transport drivers faced a number of major problems that included icy and often impassable roads, lack of access to driveways, tanks buried under snow several feet deep, customers running out of gas sooner than expected, customers in desperate need of gas, hurricane-force winds, and not enough time in a shift to stay on top of their schedule.

We can blame, or we can work together to sort out the logistics. All energy supplies aren't as cheap and secure as they used to be.

Now, let me review some of the new pellet appliances this season displayed at HPBExpo:

### 1. American Energy Systems, Inc.

They featured the new Winchester Pedestal design with their latent, innovative, multi-fuel technology. Step top design, auto-ignition, user friendly control (super-board) with early diagnostic functions, plus a food warming trivet. Watch for a new line called Orien, two new cast iron units and a new boiler. Lab tests have been taking place on switch and prairie grass pellets along with corn and hardwood mix. Could this mean a Vesta entry for Atlanta 2008?

### 2. Archgard Fireplace Products

7 Marketed as the "Environmentally Friendly" Optima

PS1 is a nicely styled, elegant unit. Smooth lines with, they say, the industry's largest ceramic glass, a no clean heat exchanger, low-noise components, 42,000 Btu max, with an impressive 95lb pellet, 110 lb corn hopper. A corn burning version is offered. A very nice unit that Archgard dealers should be proud to show.

### 3. Bixby Energy

A new commercial grade stove called the "Ugly Black Box" was shown. This is actually an impressive industrial styled heater. At 70,000 Btu, huge hopper capacity, self-cleaning burn pot, the "Max Fire" patent-pending burn technology with fully automatic start-up and controls bring to market a very intelligent bio-mass burner. Please read what this company has to say about being dedicated to developing a practical, sustainable solution to the world's energy needs.

### 4. Breckwell Hearth Products

A solid pellet appliance manufacturer showed their strong line-up but seemed to "rest on their laurels."

### 5. BOSCA CHILE S.A.

They are a Chilean company that was established in 1985. During 2006, in conjunction with American engineers, they began development on their first model, the Spirit 500. They market under the words "Good Taste." The cabinet is very European, graceful and refined, flowing in design like a glass of fine Washington wine. Please be aware of this company.

### 6. Central Boiler

They produce an outdoor wood pellet and Corn Furnace: We don't find many of these furnaces being installed in the West yet, but as electric and gas prices rise I know they will play more of a role. The Maxim is very sophisticated, with a Btu range up to 175,000, a new technology rotating aerator supplying oxygen to the fuel, achieving efficiencies up to 80%. Touch button operation, the furnace can be set up for forced air heating or with domestic hot water. Another very well designed unit from Central Boiler.

### 7. Fahrenheit Technologies, Inc.

The Endurance 50F, Next-Generation Bio-mass Furnace. This unit is unique in that it can be installed as a stand-alone stove using a warm air diffuser instead of direct heat exchanger air, or it works as a furnace with the heat piped through duct work. They claim extremely high efficiency, a cool touch cabinet, the patent-pending cycleclean, self-cleaning fire-pot that automatically discharges a light ash wafer while maintaining the flame. This is another new unit that is a must for your research.

### 8. Dansons Group, Inc. (DGI)

These folks are a major player in the pellet appliance, BBQ, and pellet fuel arena and they appear every year with one or more new products to tickle our fancy. And thanks for the snack off the Barbie, it was tasty.

*Continued on page 10*

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**BLISS AD**

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**KICE AD**

## **Pellet Appliance Review 2007 continued from page 7**

The multi-fuel Eagle Pellet Stove is a 1500 Square Foot home heater of compact design. With a distinctive, rounded arch windowed door, subtle nickel trim and a super grate technology that lets you burn low to premium quality pellets. My compliments to the designers. Their second model is marketed under the Pelpro name and it's a pellet furnace. At 80,000 Btu, a 275 lb hopper, massive 3-sided heat exchanger, 4' exhaust, fresh air kit included, at a competitive price, I'm sure they have another winner.

### **9. Englander/England's Stove Works, Inc.**

Marketing also under the name Summers Heat, the multi-fuel unit called creatively, the 49-SHCFM (Summers Heat Corn, Pellet/Multi), the stove is smart enough to burn the fuel that's available in your area. The bay design is fairly new for Englander. It's designed to heat over 2,000 Square Feet and has an excellent price in comparison.

Watch for another new multi-fuel stove that they are taking orders on pending approval.

### **10. Hearth Products Group**

From Portland, Oregon, returns the Austro Flamm to our shores. The exquisite and always beautiful Integra II freestanding and insert are joined by the more vertical, compact and equally well styled VISIO and Premio. Always considered one of the premium pellet appliances, the whisper quiet operation will continue to please. If you are looking to decorate your home with a refined and graceful piece of heating equipment, think Austro Flamm.

### **11. Harman Stove Company**

Having featured Harman's PB100 pellet boiler in last year's report, I was pleased to find that they have designed a Bio-Fuel Bulk Hopper that will add approximately 1,400lbs of pellets, corn or grain onto their bio-fuel central heaters. It has an automatic fuel level sensor that tells the hopper when to transfer fuel. It is also compatible with the freestanding pellet stoves: P68, P61 & P61A, P38 and PC45. Finally, bulk storage and hopefully delivery begin to find it's way into the U.S.

### **12. Lennox Hearth Products/Country Stoves**

As the marriage of the two companies works its way through the honeymoon stage, it was evident at the tradeshow that there is product from both lines that will interest dealers. The outdoor burn building was usually crowded showing a new small freestanding model which will replace the Profile 20, called the "Montage." The compact, clean style, single front glass door evolves out of the older bay window look. I like it better. Improved dependability, ease of service, no photo eye, and new control board and air wash is the report.

A new cast iron multi-fuel stove was being shown behind closed doors. Finally, after going through two armed guards, interrogation stations, giving blood and my finger prints, I mentioned I know Ken Tucker and Dan Henry and

BAM, I was inside. Nice Stove! They have a new tech team assigned and are paying attention to all the details. We'll let the stove do the talking. Hope to see it out there this fall, I believe with a country label.

### **13. Great Lakes Stoves**

The CH 150 is a fascinating up to 150,000 Btu portable heater on wheels. Uses dual augers, removable and replaceable heat exchanger tubes (now that's a good idea), high capacity heat exchanger blower, option 300 lb hopper. For contractors to reduce time, labor and the expense of other fuels. Great for drying sheet rock. Please, check out this idea.

### **14. Hearth & Home Technologies/ Quadra-Fire**

Get yourself back to Atlanta with those great Quads. You missed a good time, and most of us only get to see each other once or twice a year.

### **15. Napoleon**

Welcome to the world of pellet burning. They announced the Auburn (NPS40) pellet stove as both a freestanding and insert. A range from 8,00 to 43,000 is a good heat range. Fairly conservative approach for a first attempt, with standard features used on most pellet stoves. One impressive approach, they use a heavy duty 1/8" thick, seamless heat exchange tube. The insert is attractive with its cast iron surround. And check out the bars in the burn grate, as these work with higher ash pellets and on a lower burn setting. I think Napoleon dealers have a good stove company.

### **16. Regency Fireplace Products**

They introduced a new pellet insert with a bay window basic burn grate, style and features. It should be on the market by this fall and we will learn more. The Dell-Point was shown, re-introduced in a smaller bay window cabinet that may have been designed before the Europa. It should be priced lower than the Europa making the line more affordable to the public. It's a wonderful design, truly efficient, can burn almost anything, and operates for days with little attention. More dealers need to be aware of this technology.

### **17. Sherwood Industries**

They are back with their large, 60,000 Btu Omega freestanding pellet stove as a Multi-fuel burner. The burner allows different types of fuel without changing any burn parts. A rotating rod breaks up the clinkers. On high ash fuels, you can run at least 140 lbs before attending to the burner. Their bolt on Hearth pad is neat. It will cut total installation cost. Also, the beautiful colors, powerful convection blower, leveling legs and three heat-mode control settings make this unit a complete package. The Enviro line has really matured.

### **18. Thelin Company**

The always popular Parlour and Gnome battery backup pellet appliances have been joined by the traditional

**Pellet appliance review continued from page 10**

quality of cast iron in a stove named the Echo. They all offer the electronic ignition feature now and the Echo is available in six porcelain finishes. This company is a true pioneer in the pellet industry.

**19. Travis Industries, Inc.**

Both the Leyden Cast Iron by Lopi and the Arbor by Avalon are two of the finest examples of cast iron design and construction to bless their pellet combustion internals. Form comes before function with these designs. The multi-fueled burn characteristic is new for this company and needs to be put to the test, but it's a wonderful step forward in Travis's new commitment to the pellet option.

**20. United States Stove Company**

I see these folks at the trade show each year and because they are on the other side of the country I don't think about them until I'm in their booth again. Then I see that they are on to something and haven't been in hiding after all. They've come out strong this year with four new units. The freestanding and insert, multi-fuel heater named the Model 6039 offers a new digital control board with built-in diagnostics, new LED display, new powder coat paint and what really caught my attention was their stylish cast door with brushed stainless steel trim. The stove is rated up to 52,300 Btu, so it packs a punch but it's so attractive that it deserves a complimentary name. How about it marketing department?

Their other two nits are the 5500 and 5500 XL. At 48,000 Btu max, they hiked either 150 lbs of 320 lbs of fuel. Boxey but they use the same attractive door so they could be used in the home. Keep up the good work and don't forget the names.

**21. Snoqualmie Stove Works**

They introduced the SNQ-1 Radiant Heat Pellet Stove. Marketed as a remarkable new design in the pellet burning appliances by winning the Vesta award this was validated. The SNQ-1 uses 100% of it's surface area as a heat exchanger but offers a blower for those deciding they need it. The combustion capsule keeps the pellets in constant flux when burning with combustion air entering the capsule from above and below, creating turbulent air movement and increased oxygen. The pellets are kept in constant motion resulting in almost complete combustion. Pellets are dropped vertically into the capsule, which is also innovative.

The stove is extremely quiet, burns very clean, uses an ultra modern carbon fiber and brushed aluminum construction which stays cool or slightly warm to the touch, dramatically reducing the chance of burn. How wonderful to see the excitement generated around this design. How many of you are waiting for your burn models so that you can fully grasp the technology. Thank you for a new approach to pellet burning combustion and design.

And thanks to everyone for a truly break-through year!

**WELCOME NEW MEMBERS**

**Fabrication EcoFlamme Inc**

**Buhler Inc.**

**Armstrong World Industries**

**Corinth Wood Pellets LLC**

**Enchantment Biomass Products**

**Finger Lakes Pellet Co. Inc.**

**West Texas BioEnergy**

**Mollers North America**

**West Salem Machinery**

**Equipment Dynamics, Inc.**

**Introfex Packaging Inc.**

**Wabash Wood Products**

**Salerno Plastics**

**Patterson Wood Products, Inc.**

**Elkhorn Industries, Inc**

**Land O'Lakes Purina Feed**

**Michigan Wood Pellet, LLC**

**Cogent Biomass Group Inc.**

**Great Lakes Renewable Energy, Inc.**

**Becker Marketing Services, Inc.**

**Curran Renewable Energy, LLC**

**Ice Systems & Supplies, Inc.**

**PelletEX LLC**

# ONIX AD

## **The Pellet Industry – 2006**

*By Don Johnson, HPBA Director of Market Research*

According to data collected by the Hearth, Patio & Barbecue Association (HPBA), a record number of pellet fueled hearth appliances were shipped in the U.S. during 2006.

Specifically, HPBA reported that the industry shipped a total of 133,105 pellet fueled hearth appliances in the U.S. during 2006. This is 12% more than the 118,746 units shipped one year earlier. While this total only accounts for about 5% of all the hearth appliances shipped in the country during 2006, it represents about 41% of all the freestanding stoves shipped in the U.S. during the year. In addition, pellet stoves accounted for about 54% of freestanding stove net sales for the year. Since 1999, according to the data produced by HPBA, the number of pellet stove shipments increased a whopping 291%, from approximately 34,000 units shipped in 1999 to the 133,105 shipped in 2006. Overall, the industry increased in six out of the last seven years, including the last four years in a row, increasing 43%, 39%, 76% and 12% over the last four years, respectively

However, everything was not completely positive for the year. According to the association, pellet stove shipments took a significant drop during the fourth quarter of 2006 compared to the fourth quarter of 2005. Specifically, the number of pellet fueled hearth appliances declined 50% in the fourth quarter of 2006 versus the fourth quarter of 2005. Unfortunately, many in the industry feel that this downturn will continue into 2007, and possibly into 2008, before things begin to change.

The hearth industry as a whole – cordwood, gas, pellet, and electric hearth appliances – did not have one of its better years in 2006. Between 2005 and 2006, cordwood hearth appliance shipments declined 7% (from 561,696 to 525,097), gas appliance shipments declined 19%, (from 2,141,165 to 1,739,602), while electric hearth appliance shipments increased 20% (from 380,000 to 456,000). Overall, including pellet appliance shipments, total hearth appliance shipments declined 11%, from 3,201,607 in 2005 to 2,853,804 in 2006. However, it should be kept in mind that while 2006 was not the best of years for the hearth industry, it was still the third highest year on record, trailing only 2004 and 2005.

According to data collected by the Pellet Fuels Institute (PFI), a record 1,148,000 tons of pellet fuel were shipped during 2006 – 11% more than the record 1,030,000 tons shipped the year before. Over the past six years, the total tonnage of pellet fuel shipped in the U.S. increased 79%, from 641,000 tons shipped in 2000 to 1,148,000 tons shipped in 2006.

## THE VIEW FROM ARLINGTON

By Don Kaiser, PFI Executive Director

Hopefully you all made it to Reno for HPBExpo 2007. What a great event! I walked the show floor and the Outdoor Burn area, and the traffic at pellet appliance and pellet manufacturer booths seemed terrific. The PFI membership booth received tremendous traffic from retailers wanting to learn more about the industry in general and PFI activities specifically. Our theme at this year's HPBExpo was "Renewable Energy as the Home Heating Solution." PFI once again had the "blinking badges" with our logo that attendees wore to show their support for PFI and the pellet industry. PFI also gave away our signature PFI tote bags and, in keeping with the Reno gambling theme, PFI playing cards. In addition, as a service to our fuel members and HPBA appliance manufacturers, we distributed detailed maps of their booth positions, so that attendees could navigate their way to the pellet related exhibitors. New at the booth this year, was a letter writing campaign to promote pellets and the funding of the pellet portion of the Renewable Energy Security Act (RESA). With the help of our lobbying firm, Fleishman-Hillard, over 500 letters to members of Congress were signed and were delivered to the elected officials after we returned from Reno. Thanks to all who participated and please call the PFI offices at 703-522-6778 if you want more information on writing your politicians, inviting them to tour your plants, etc.

The annual HPBExpo Membership Luncheon was filled to capacity again this year with a new record of approximately 200 attendees. The attendees were a good mixture of the pellet industry including fuel manufacturers, retailers, appliance manufacturers, and even noticeable participation from international visitors. The program was a lively blend of topics. PFI President Bruce Lisle kicked off the program with a retrospective on PFI's workings in 2006. Lisle said that PFI had record levels of membership, revenues, and fund balances. He reiterated that PFI continued to expand its programs in 2006 and would look to do even more in 2007 especially in government relations and pellet fuel standards.

The keynote speaker was the Honorable John Peterson, Congressman from Pennsylvania. Congressman Peterson discussed the current state of energy affairs and the role that renewables and pellets could play going forward. He was very positive on his outlook for the industry and urged all those at the meeting to become more involved in the political process to let the voice of the pellet industry be heard. Peterson ended his presentation with a lively question and answer session with the audience. Steve Walker, Government Affairs Committee Co-Chair and the Honorable Max Sandlin, former U.S. Representative from Texas, currently with the firm of Fleishman-Hillard, PFI's government relations firm, updated the attendees on PFI's current plans and strategies in government relations. In addition, fuel standards were discussed and the latest

pellet appliance and fuel shipment numbers were shared with the audience.

Our next time together will be at our annual summer conference. This year, we will be at the beautiful and historic Pinehurst Resort in Pinehurst, North Carolina from July 19-21, 2007. Pinehurst is world renowned for its golf courses which has held numerous prestigious tournaments throughout the years including the U.S. Open. Pinehurst is not just golf, it is a world class family resort with tennis, swimming, full spa services, biking, hiking, and more. Make your plans to bring the family and stay a few extra days. We will have our annual PFI Golf Tournament and as an alternative, we will be having a hiking outing in the beautiful Uwharrie National Forest that promises to be fun for everyone. The conference committee has worked very hard to put together a great program this year. Registration, sponsorship, and hotel forms can be found at our website at [www.pelletheat.org](http://www.pelletheat.org). See you in Pinehurst!

### Membership Directory Update

The 2007-2008 *HPBA Membership Directory* will be released in late October, 2007. Each HPBA and PFI member company main contact receives a complimentary company listing and a complimentary directory. In addition, each member company receives a complimentary listing on [www.hpbamemberdirectory.org](http://www.hpbamemberdirectory.org).

The annual HPBA/PFI Membership Directory & Products Guide update process is currently underway. Changes to your company listing must be made by **June 11, 2007**. Details on how to update your listing were mailed on April 27th. If HPBA members have any questions regarding this process, they should contact Antonio Jackson at (703) 522-0086 ext. 117 or [jackson@hpba.org](mailto:jackson@hpba.org). PFI members with questions should contact Denise McDonald at [mcdonald@hpba.org](mailto:mcdonald@hpba.org) or at (703) 522-6778.

For advertising opportunities, rates and deadlines. Please contact Betteanne Leahy at (800) 404-5461 or [leahy@hpba.org](mailto:leahy@hpba.org) for more information.

# M-E-C AD

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**CPM AD**

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# WEST SALEM MACHINERY AD

## Standards Overview and Update:

*By Chris Wiberg, Twin Ports Testing*

During the PFI Membership Luncheon at the HPBA conference in Reno this past March, John Weaver of Fiber Resources provided an overview of the new residential pellet fuels standards that are being considered by the PFI Standards Committee. While the overview provided was quite brief due to time constraints of the membership luncheon program, the standards being developed for board review are quite complex. For this reason we have scheduled significant time during the 2007 PFI Annual Conference in Pinehurst, NC, this July to present and discuss these proposed new standards in detail.

If you currently operate a pellet mill or are planning on building a pellet mill, now is a very good time to become informed. For the benefit of our members who may not be fully informed, I am providing this brief synopsis of the reasoning behind the revision of the standards, the standards revision process, and the components of the standards being proposed.

The current PFI standards separate pellet fuels into two grades--premium grade and standard grade. Both grades list requirements for bulk density, pellet diameter, fines, length and inorganic ash content. The only difference between the two is that premium grade requires ash content to be below 1% and standard grade below 3%. The standards also recommend that pellet fuel manufacturer members label their product as meeting PFI standard or premium grade, disclose the type of materials used (e.g. wood, paper, agricultural residues), and that the manufacturer include on their bags the PFI membership logo and in a printed block the guaranteed analysis.

The current standards have been in place since 1995. However, within the past few years concerns have been raised regarding whether the scope of these standards cover the needs of the vastly growing pellet fuels market. Critical deficiencies noted included poor delineation on how the tests were to be conducted, resulting in inconsistency in the sampling and analysis methods being utilized by mills with in-house labs as well as by fixed based labs. In addition, the current standards provide no delineation of sampling and analysis frequencies, resulting in some mills conducting analysis on too infrequent of a basis to adequately assure that the guaranteed analysis values are truly representative of the fuel being produced. Finally, and most importantly, the current standards provide no program for enforcement. As a result, it is a common perception, especially among pellet fuel appliance manufacturers, that just because it says premium on the bag does not mean that the fuel qualifies as a premium grade of fuel.

Beginning immediately after the 2005 PFI Annual Conference in Reno and continuing on to this day, the PFI Standards Committee has been engaged in an effort to provide a new set of standards that addresses the deficiencies noted above. Components of this effort have

included discussions with appliance manufacturers to identify a comprehensive list of chemical and physical parameters that are critical in the proper functioning of pellet burning appliances, the development of a questionnaire that was submitted to all PFI pellet fuel manufacturer members to identify the sampling and analysis methods and equipment currently in use by mills and fixed based labs within North America, a comprehensive evaluation of published sampling and analysis methods, and an assessment of sampling frequency and statistical verification techniques. European standards such as the German DIN 51731/DIN Plus, Austrian Onorm M7135, Swedish SS 18 71 20, Italy CTI - R 04/5, British Biogen, and especially the work product of the European Committee for Standardization (CEN/TC 335) have been continuously consulted throughout the process. Every effort has been made to develop a program as similar as possible to the programs in place overseas, short of converting to metric.

While we will save the in-depth discussion of the proposed new program for the 2007 PFI Annual Conference in Pinehurst, I can tell you that the new standards being proposed incorporate a much broader list of chemical and physical properties that need to be evaluated, specify the methods to be used for all analyses, require each mill to set up a fairly basic in-house lab for assessing daily quality control, and require a regimented submittal of samples to an outside laboratory for routine quality assurance verification and statistical control chart tracking of the analyzed parameters. The standards being proposed also incorporate a system for initial quality verification and fuel grading, registration of the verified grade with the PFI, an Internet accessible list of all PFI registered products, and a system of enforcement.

This proposed program could generate much debate. It is very likely that some mills that currently market their fuel as premium grade may find that they either no longer qualify as a premium grade or they may find that they will need to make changes to their operations in order to continue marketing their fuel as premium. For new mills, it is essential that they be informed of the new standards so that they can properly plan their economic models as there is no doubt this program will increase operating costs and possibly change the type of product that a new mill would wish to produce.

In summary, I would highly encourage everyone to attend the 2007 PFI Annual Conference in Pinehurst. The conference will be your best opportunity to gain an understanding of the program and even help in its development by expressing your concerns and/or comments. If you have questions, concerns, or comments that can't wait until July, then I encourage you to send them to myself in an email so that they can be shared with the other members of the Standards Committee. My email address is [chris.wiberg@twinportstesting.com](mailto:chris.wiberg@twinportstesting.com)

See you in Pinehurst.



## **NFI Pellet Job Analysis Survey Support**

### **What is Needed**

A revised Pellet Job Analysis Survey to determine the content of future revisions to the NFI Pellet Specialist Certification Exam, required by national testing standards, will be conducted mid-June through mid-July, 2007. To help ensure that we receive a sufficient number of qualified survey responses, NFI is requesting strong support from pellet appliance and fuel manufacturers, distributors, reps, and retailers.

### **Why You Should Help**

Rapid growth calls for training and qualifications. NFI training and certification is one of the best routes to professionalism that results in correct installations and reduced error and liability.

### **How You Can Help**

Knowledgeable pellet system planners and installers need to know about the survey, understand its importance, and be encouraged to complete surveys. Ways you can help make this happen include:

- Inclusion of press releases provided by NFI in your mailings and newsletters
- Inclusion of surveys in your mailings to dealers
- Distribution of surveys at your dealer meetings
- Providing time for your dealers to fill out surveys at dealer meetings
- Making sure your pellet installation and planning knowledgeable staff completes surveys

If you are willing to help promote the NFI Pellet Job Analysis Survey, please contact Caleb Woodard by email [woodard@hpba.org](mailto:woodard@hpba.org) or by phone 703-524-8030 as soon as possible.

# RETHCIEF AD

## PFI Supplier Members

Company Name	City	State	Phone	Website
Amandus Kahl USA Corporation	Alpharetta	GA	(770)521-1021	www.akahl.us
Andritz Sprout	McMurray	PA	(724)941-1416	www.andritzsproutbauer.com
Becker Marketing Services, Inc.	Monroe	GA	(770)266-7659	www.bmsipackaging.com
Bliss Industries Inc.	Ponca City	OK	(580)765-7787	www.bliss-industries.com
Buhler Inc.	Plymouth	MN	(463)847-9900	www.buhlergroup.com
Bulldog Bag Ltd.	Richmond	BC	(604)273-8021	www.bulldogbag.com
California Pellet Mill	Waterloo	IA	(319)232-8444	www.cpmroskamp.com
Cogent Biomass Group Inc.	Toronto	ON	(416)963-8702	www.cogentbiomass.com
Condex (UK) Ltd.	Lancashire		(+44)015-2461601	www.pelletmills.com
Construction Management, LLC	Coeur d'Alene	ID	(208)765-6020	www.constructionmanagementllc.com
Continental Agra Equipment	Newton	KS	(316)283-9602	www.continentalagra.com
Creative Packaging Inc.	Lookout Mountain	TN	(423)825-5311	www.forestindustry.com/creativepackagin
Dorssers Inc.	Blenheim	ON	(519)676-8113	www.dorssers.com
Dupps Company	Germantown	OH	(937)855-6555	www.dupps.com
Equipment Dynamics, Inc.	Schnecksville	PA	(610)799-6637	www.equipment-dynamics.com
Ernst Conservation Seeds	Meadville	PA	(814)336-2404	www.ernstseed.com
FLAMEX Inc.	Greensboro	NC	(336)299-2933	www.flamexinc.com
Hamer LLC	Plymouth	MN	(763)231-0100	
Hood Packaging Corporation	Burlington	ON	(905)637-5611	www.hoodpkg.com
Ice Systems & Supplies, Inc.	Rock Hill	SC	(803)324-8791	issionline.com
Industrial Turnaround Corporation	Chester	VA	(804)414-1101	www.itnc-net.com
Introflex Packaging Inc.	St. Jerome	QC	(450)476-1881	www.introflex1983.com
Kesco, Inc.	Fort Mill	SC	(803)802-1718	www.kescosolutions.com
Kice Industries Inc.	Wichita	KS	(316)744-7151	www.kice.com
Laidig Systems, Inc.	Huntersville	NC	(704)947-0017	www.laidig.com
M-E-C Company	Neodesha	KS	(620)325-2673	www.m-e-c.com
Mollers North America	Grand Rapids	MI	(616)942-6504	mollersna.com
PASCO	St. Louis	MO	(800)489-3300	www.pascosystems.com
PelletEX LLC	Charlotte	VA	(704)815-1785	www.pelletex.com
PolyTran, Inc.	Jacksonville	FL	(904)306-0027	
Premier Tech Systems	Riviere-du-Loup	QC	(418)868-TECH (8324)	www.premiertechsystems.com
Primary Packaging Incorporated	Bolivar	OH	(330)874-3131	www.primarypackaging.com
Rethceif Enterprises LLC	Bluffton	IN	(260)565-4591	www.rethceif.com
Salerno Plastics	Platts Burh	NY	(518)563-3636 X19	salernobags.com
Shields Bag & Printing Company	Yakima	WA	(509)577-9526	www.shieldsbag.com
Trinity Packaging Corporation	Armonk	NY	(914)273-4111	www.trinitypackaging.com
Twin Ports Testing, Inc.	Superior	WI	(715)392-7114	www.twinportstesting.com
Wendling Bioenergy Consulting	Williamstown	MA	(413)458-5326	
West Salem Machinery	Salem	OR	(503)364-2213	www.westsalem.com

## PFI Fuel Manufacturer Members

Company Name	City	State	Phone	Website
Allegheny Pellet Corporation	Youngsville	PA	(814)563-4358	www.woodpelletfuels.com
American Wood Fibers	Columbia	MD	(410)290-8700	
Anderson Hardwood Pellets LLC	Louisville	KY	(502)778-5591	www.andersonwood.com
Armstrong Pellet, Inc.	Armstrong	BC	(250)546-8484	www.armstrongpellets.com
Armstrong World Industries	Lancaster	PA	(717)396-5687	www.armstrong.com
Associated Harvest Company	Lafargeville	NY	(315)658-2926	
Barefoot Pellet Company	Troy	PA	(570)297-4771	www.clc1.com
Barnes Brothers Hardwood Flooring	Hamburg	AR	(870)853-8288	
Bay Lakes Companies, LLC	Oconto Falls	WI	(920)846-3461	www.baylakes.com
Bear Mountain Forest Products Inc.	Cascade Locks	OR	(541)374-8844	www.bmfip.com
Bert & Wetta Sales, Inc.	Larned	KS	(620)285-7777	
Christopher Lumber Company, Inc.	Crockett	TX	(936)544-2028	
CKS Enerav. Inc.	Amorv	MS	(413)283-8010	www.caltechnologies.com

## PFI Fuel Manufacturer Members Cont.

Company Name	City	State	Phone	Website
CNZ Corporation	Sheridan	WY	(307)672-9797	
Corinth Wood Pellets LLC	Corinth	ME	(207)285-7700	www.corinthwoodpellets.com
Curran Renewable Energy, LLC	Massena	NY	(315)769-5970	
Dansons Group Inc.	Acheson	AB	(780)962-8509	www.dansons.com
Dejno's Inc.	Kenosha	WI	(262)657-1210	www.dejnos.com
Dry Creek Products, Inc.	Arcade	NY	(585)492-2990	www.drycreekproducts.com
Elkhorn Industries, Inc	Superior	WI	(218)348-6161	
Enchantment Biomass Products	Ruidoso Downs	NM	(505)378-5410	
Energex Pellet Fuel, Inc.	Mifflintown	PA	(717)436-2400	www.energex.com
Equustock, LLC	Loves Park	IL	(815)871-6000	
Eureka Pellet Mills Inc.	Missoula	MT	(406)543-0812	
Fabrication EcoFlamme Inc	Temiscaming	QC	(819)627-9633	www.ecoflamme.ca
Fiber By-Products, Corp.	Goshen	IN	(574)534-1820	www.fiberby-products.com
Fiber Resources Inc.	Pine Bluff	AR	(870)535-1759	www.heatresource.com
Finger Lakes Pellet Co. Inc.	Geneva	NY	(315)719-4435	
Forest Energy Corporation	Show Low	AZ	(928)537-1647	www.forestenergy.com
Fram Renewable Fuels, LLC	Savannah	GA	(912)233-8805	www.framfuels.com
Fulghum Fibrefuels, Ltd	Augusta	GA	(706)651-1000	www.fulghumfibrefuels.com
FutureFuel Chemical Company	Batesville	AR	(870)698-1811	www.futurefuelcorporation.com/ffcc/
Good Times Wood Products, Inc.	Rusk	TX	(903)683-2608	www.goodtimeswoodproducts.com
Great Lakes Renewable Energy, Inc.	Rice Lake	WI	(715)736-1950	
Greene Team Pellet Fuel Company	Garards Fort	PA	(724)966-2166	
Hamer Pellet Fuel Co.	Kenova	WV	(304)453-6381	www.hamerpellet.com
Hassell & Hughes Lumber Company	Collinwood	TN	(931)724-9191	www.hassellandhughes.com
Heartland Pellets / Pope & Talbot Inc.	Spearfish	SD	(605)642-2363	
Koetter and Smith, Inc.	Borden	IN	(812)923-5111	www.koetersmith.com
Lakewood Industries - Pellet Division	Ear Falls	ON	(807)222-3616	
Land O'Lakes Purina Feed	St. Louis	MO	(314)317-5200	www.bradfieldorganics.com
Langs Dehy Ltd.	Palmerston	ON	(519)343-3353	
Lignetics of West Virginia, Inc	Glenville	WV	(304)462-4848	www.lignetics.com
Lignetics, Inc.	Sandpoint	ID	(208)263-0564	www.lignetics.com
Maeder Brothers Quality Wood Pellets Inc.	Weidman	MI	(989)644-3500	www.maederwoodpellets.com
Marth Wood Shaving Supply Inc.	Marathon	WI	(715)842-9200	www.marthwood.com
Marwood Ltd.	Fredericton	NB	(506)444-7141	www.comfycozypellets.com
Michigan Wood Pellet Fuel, LLC	Holland	MI	(616)931-9939	www.michiganwoodpellets.com
Michigan Wood Pellet, LLC	Grayling	MI	(888)873-5538	www.michiganwoodpellet.com
MT Timber Wood Products	Mt. Iron	MN	(218)735-8600	
Narragansett Pellet Corporation	East Providence	RI	(401)434-4800	www.npc-ri.com
New England Wood Pellet, Inc.	Jaffrey	NH	(603)532-9400	www.pelletheat.com
NLI (Natural Living Innovations)	Overland Park	KS	(913)851-3500	
Orscheln Farm & Home	Moberly	MO	(660)269-4580	
Ozark Hardwood Products, LLC	Seymour	MO	(417)935-9663	www.ozarkhardwoodproducts.com
PA Pellets, LLC	Coudersport	PA	(814)274-3233	www.papellets.com
Patterson Wood Products, Inc.	Nacogdoches	TX	(936)569-1994	
Penn Wood Products, Inc.	East Berlin	PA	(717)259-9551	www.pennwoodproducts.com
Pennington Seed Inc.	Greenfield	MO	(417)637-5978	
Princeton Co-Generation	Princeton	BC	(250)295-6940	www.eaglevalleypellets.com
Shaw Resources	Shubenacadie	NS	(902)758-2095	www.shawresources.ca
Somerset Pellets	Somerset	KY	(606)678-2842	
Southern Kentucky Hardwood Flooring	Gamaliel	KY	(270)457-3618	
Southwest Forest Products, Inc.	Phoenix	AZ	(602)278-1009	www.southwestforestproducts.com
Sunizona Greenhouses Inc.	Willcox	AZ	(520)824-3160	
Tree Cycle, LLC	Glen Gardner	NJ	(908)642-7447	www.treecyclellc.com
Turman Hardwood Flooring	Galax	VA	(276)236-9963	
Wabash Wood Products	Harrison	AR	(870)741-1734	
West Oregon Wood Products, Inc.	Columbia City	OR	(503)397-6707	www.owpellets.com
West Texas BioEnergy	Frisco	TX	(214)536-4690	
Zeager Brothers, Inc.	Middletown	PA	(717)944-7481	www.zeager.com

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