

PELLET FUELS INSTITUTE

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2012 Issue #1 Newsletter



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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- PFI Annual Conference 2012: Heading North, page 8
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President's Message

Summer has begun and the PFI Annual Conference, to be held July 29-31, at the MGM Grand at Foxwoods, in Mashantucket, CT, is quickly approaching. I hope that all PFI

members, potential members, and anyone with a strong interest in the biomass industry will consider attending. This year, we are sure to see some old faces, along with a lot of new ones, as we encourage hearth retailers to attend. In addition to an excellent conference program, great location, and fun activities, there will be a special breakout session on the PFI standards, geared towards retailers. A conference registration form



Scott Jacobs, PFI President

is included later in this newsletter and is available on <u>pelletheat.org</u>. Given the proximity of the conference, completed registrations should be e-mailed or faxed to PFI immediately.

Amongst the other new faces at this year's conference will be many of the thirteen new members who have joined PFI since the first of the year. These companies are: AgriRecycle, Inc., Chantland MHS, Choctaw County Economic Development Foundation, CSX Transportation, Fiber Energy Products AR, LLC, Forest Business Network LLC, Grandeg Bio Pellet Boiler Manufacturing, Jacobs Corporation, JF Rohrbaugh, Co., Inc., Larson Engineering, Inc., Package Research Laboratory, Price LogPro, LLC, and Prodesa North America Corporation. These thirteen companies represent a 117% increase in new members so far this year, versus all of 2011. While this is surely a good sign for our trade association, we hope that it is a small sign of an improving economy, and, in particular, the dynamics of our industry.

Having welcomed these new members into PFI's fold, now is a good time to remind everyone how they can get involved and get the most out of their association membership. The above-mentioned PFI Annual Conference is a can't miss, both for fuel manufacturer (PFM) and industry supplier (PFS) members. There, you will have a continued on page 3

PFI BOARD OF DIRECTORS

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John Crouch, Director of Public Affairs Email: hedrick@pelletheat.org

Do you have an item for the Calendar of Events? Email it to berthiaume@pelletheat.org July 29-31, 2012 **PFI Annual Conference** Foxwoods Resort & Casino Mashantucket, CT www.pelletheat.org 3rd Annual Southern Utah September 18-20, 2012 **Biomass Field Day** Beaver, UT www.utahbiomass.com **RISI North American Forest** October 3-4, 2012 **Products Conference** Park Plaza Hotel Boston, MA www.risiinfo.com/events/na_conf October 15-17, 2012 **RETECH 2012 Omni Shoreham Hotel** Washington, DC www.retech2012.com

CALENDAR OF EVENTS



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President's Message, continued from page 1

chance to sign up for one of PFI's committees: Commercial Fuel, Conference, Government Affairs, Grants, Membership, Promotions & Communications, and Standards. Volunteering to serve on a committee is a great way to get more involved with the association, while working hand-in-hand with your fellow members on issues of importance to the industry.

All members, new and old, should be aware of some of the features that are available, or in the works, for <u>pelletheat.org</u>. For fuel manufacturers, the fuel availability page is something that should be updated frequently. It is a resource that retailers, or other pellet distributors can use to find out which fuel manufacturers have inventory available at a given time. PFI mails and faxes a survey periodically to its members, asking them to update their listing, though the information can be updated at any

time by sending an e-mail to pfimail@pellethe-at.org.

In addition to helping members move their fuel inventory, the PFI website is also a good resource for upcoming events in the biomass industry. The event calendar lists future conferences and meetings, many of which offer registration discounts to PFI members. If you are involved with any organizations that are holding biomass-related meetings or conferences, you can e-mail a listing to PFI for consideration for the event calendar.

Lastly, there are plans underway to develop a members-only section of the website. These password-protected pages will host information available exclusively to PFI members. While it is important that PFI remains a vocal, public advocate for the densified biomass industry, it

continued on page 4

KICE Industries

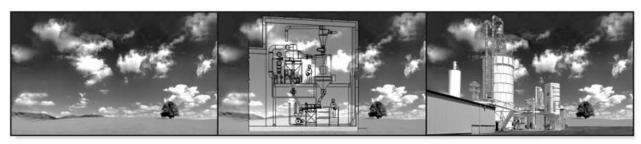


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President's Message, continued from page 3

is also important that members have a convenient place to access the products that their involvement and financial support of the association help to create. Look for more information about the members-only section, including content and how to login, as the summer progresses.

I'm looking forward to seeing many of you at the PFI Annual Conference in a few short weeks, and the start of another heating season a few months down the road. Let's hope that we're blessed with some mild New England temperatures in July, and some nice, cool pellet-burning weather when the leaves start to turn.

Scott Jacobs pfipresident@pelletheat.org

Image of the Issue

PFI Executive Director Jennifer Hedrick snapped this picture of Forest Energy Corporations's Gary Moore (left) and Mike Lundy during a visit to their plant in April.

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





















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June 2012 MARKET UPDATE

Producer Comments:

"Once again the market is flooded with pellets. Supply has exceeded demand. The warm winter didn't help either." –Northeast

"Way behind YTD compared to last year, but staying positive, as we had no winter last year, and we are still competitive with propane, corn, electric, and oil." –Midwest

"Too many pellets, too few customers. \$80 oil isn't going to help" -Northwest & Mountain

"More raw material than pellet demand." -Northwest & Mountain

WOOD PELLETS

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

United States:

Northeast: \$165-190 range. Operating capacities range from 50-100%. Manufacturers report being behind last year in terms of tons sold.

Midwest: \$145-165 range. Most manufacturers report sufficient raw material availability and poor to average year-to-date sales volumes.

Southeast: \$135-190 range. The majority of manufacturers anticipate an upward price trend.

Northwest & Mountain: \$145-148 range. Manufacturers report average to good sales volumes and being equal to or ahead of last year, in terms of tons sold.



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PFI Annual Conference 2012: Heading North By: Jennifer Hedrick, PFI Executive Director hedrick@pelletheat.org

We're counting down the days to the PFI Annual Conference, which will be taking place July 29-31. Many of you are planning to join us in Mashantucket, Connecticut, at Foxwoods Resort Casino a new destination for our conference and one that takes us out of the southeast for the first time in eight years. The Conference Committee has considered Foxwoods for a number of years as its conference facilities are first class and the list of the resort's amenities is extensive—a variety of entertainment options, top-rated restaurants, shops, spas, golf, you name it.

As I write, the committee members are putting the finishing touches on the program. The committee reviews the answers you give to previous years' conference surveys and builds an agenda based on your feedback as well as its canvas of the issues that are most relevant to the industry at the present time.

A few topics the program will cover include:

- Marketing strategies for the promotion of the industry
- · Raw material standardization
- Barriers to industry development
- Developments in the export market

There are two additional program panels that I'd like to mention. We're pleased that Fauske and Exponent will be joining us at our conference this year. They are collaborating on a presentation that will focus on risk assessment and accident prevention, highlighting NFPA and OSHA standards and providing specific steps for compliance. They'll also look at some common mistakes made in the pelleting process and the proper steps necessary for their mitigation.

Exponent will be offering an additional presentation which promises to be quite compelling. One of our member mills has volunteered to host Exponent at its mill to conduct a risk assessment. Exponent will present those findings at the conference along with recommendations for risk mitigation.

Secondly, we're pleased to have leaders from various regions of the country joining us to discuss the impact state and local grassroots initiatives have been having on our industry. States such as New Hampshire, Maine and Maryland have developed programs that have incorporated heating with biomass into their energy portfolios. Activity at the state level is key to furthering our industry's message, particularly since federal policy has been slow to move due to political logjams.

Finally, we're thrilled to have Christiane Egger and Christian Rakos joining us from Austria. Both have been tireless advocates on behalf of the industry in Austria, one of the leaders in Europe in developing renewable energy mandates. Christian will be offering his perspective on broad developments happening across Europe and Christiane will highlight initiatives in Upper Austria, one of nine Austrian federal states. Upper Austria's state government has a targeted goal of using renewable energy to meet 100% of its thermal and electricity needs by 2030.

I encourage you to check out the conference page on the PFI website for more information about the education program as well as other conference activities. Many of you who exhibit at the conference will note the increased opportunities for attendees to interact with exhibitors. We've added an additional break this year as well as an evening reception that precedes Monday evening's festivities.

We're looking forward to seeing each of you at Foxwoods. If you have any questions between now and the conference, call or email us at any time.



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PFI Committee Updates

Government Affairs Committee

The Government Affairs (GA) Committee has been active over the past few months. While much of Washington has already shifted into campaign mode, there is still an opportunity to get things done, and to lay the groundwork for the future.

In May, PFI submitted comments for the record in support of the 25(c) tax credit for residential energy-efficient property. This tax credit, which provided a 10% credit, up to \$300, for the installation of a qualifying biomass-burning stove, expired at the end of 2011. PFI's comments focused on the efficiency of pellet appliances, their offset of fossil fuels, including heating oil and propane, and the importance of the rural jobs created by the biomass fuel industry. We hope to see the credit extended retroactively for 2012, and beyond, and eventually restored to the 2009-10 levels of 30%, up to \$1,500.

In addition, the GA Committee has planned a legislative and administrative fly-in for June 20-21. While the fly-in will occur after the newsletter goes to press, our objectives are clear. We will be holding several meetings with Members of Congress, their staffs, and executive agency officials, to advocate for specific legislation and rules favorable to biomass thermal energy, and mandatory funding and application changes for the renewable energy titles in the 2012 Farm Bill. Another goal of the committee is to grow the membership of the Congressional Biomass Caucus, a group of some 25 legislators, with whom we will be organizing a biomass briefing on June 21st.

In the past few weeks, a Joint Committee on Government Affairs was convened between PFI and the Biomass Thermal Energy Council (BTEC). The two organizations, who share many similar objectives, and who both retain Orion Advocates as their lobbying firm, are looking to maximize their cooperation on government affairs matters. The joint committee, made up of three members of each organization, will determine an agenda, while making sure that the unique interests of each group's membership are protected. PFI's Government Affairs Committee co-chairs Bruce Lisle and Derek Nelson, along with PFI President, Scott Jacobs, will provide representation on the joint committee.

Lastly, the PFI Annual Conference is coming up from July 29-31. Our lobbyist, Pat Rita, will be in attendance and will be providing a legislative and regulatory update during Monday's lunch. You are encouraged to speak to Pat during the conference and let him know of any government affairs-related questions that you may have. The conference is also the time of year when PFI's committees are formed. Any PFI members interested in serving on the GA committee, or any other committee, can sign up to be considered when the committee rosters are put together.

The Committee also recommends you take advantage of this election cycle and invite your state legislators, and your congressman and senator to your plant for visit. It's great one on one time with your elected officials.

Bruce Lisle and Derek Nelson, Government Affairs Committee Co-chairs

Conference Committee Update

The Conference Committee continues its work on planning the PFI Annual Conference. PFI's conference has not been in the northeast for some time, and we're excited about returning to the region.

We received a hearty response to our call for

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Committee Updates, continued from page 11

speakers. The committee has spent considerable time forming an agenda that addresses the needs and concerns of our industry. Sessions will focus on such topics as: pellet mill safety, marketing the industry, barriers to industry development and growth, export market developments, regulatory and policy activity at the state and national level and much more.

The committee has listened to your feedback: we've added more time to the agenda for interaction with exhibitors, including a Monday night reception in advance of the evening's dinner festivities. Back by popular demand is the special Tuesday afternoon session devoted to the PFI Standards Program. The Standards Committee is preparing an agenda that will outline how to achieve program compliance.

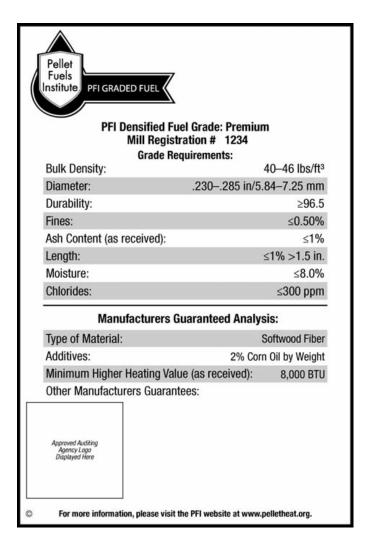
Registration for the conference is underway. The registration form is available in this newsletter or on the PFI website, where you can find more detailed information about the conference hotel, exhibiting, and sponsorship opportunities. Registration deadlines are approaching and we encourage you to reserve your spot today!

Stephen Faehner and Troy Jamieson, Conference Committee Co-chairs

Standards Committee

Since the last PFI newsletter there are a number of updates to note. First, you will notice that there is a new insignia on the PFI Quality Mark. This was deemed necessary by ALSC and PFI's Board of Directors to prevent confusion regarding the use of the PFI logo in conjunction with the quality mark. PFI's insignia has been used historically for several purposes including promotional materials and to denote membership within PFI. Since it is used for purposes other than to signify enrollment in PFI's standards program it was deemed necessary to develop an insignia specific to that purpose. Below, you will see a

sample of what the quality mark will look like for premium grade pellets.



ALSC has continued to add to its list of accredited auditors and laboratories. There are currently 12 auditors and 4 laboratories listed on the ALSC website. For a full list please visit the PFI website at www.pelletheat.org/pfi-standards/how-to-enroll/.

The Standards Committee has begun to receive feedback regarding program components that could result in future modifications. While modifications are not planned in the near future, it has been determined that the next focus of the Standards Committee needs to be developing the mechanism by which modifications will be made. It is currently too early to speculate how modifications will be handled, however if you do identify program components that can be

improved please forward your ideas to Jennifer Hedrick.

At last year's conference the Standards Committee put on a four hour symposium after the conclusion of the conference to educate industry members on the PFI Standards Program. This year there will be two opportunities to learn more about PFI's standards. The first opportunity will be during the conference in a special retailer breakout session. This will be geared towards public understanding of the program and will help attendees understand how the program works, what it aims to accomplish, and how it can be supported. The second opportunity will be a two hour symposium immediately following the PFI conference, which will focus on implementation at the production site. Please consider attending both of these educational sessions.

Chris Wiberg and Bob Sourek, Standards Committee Co-chairs



PFI Members Can Join Young Guns!

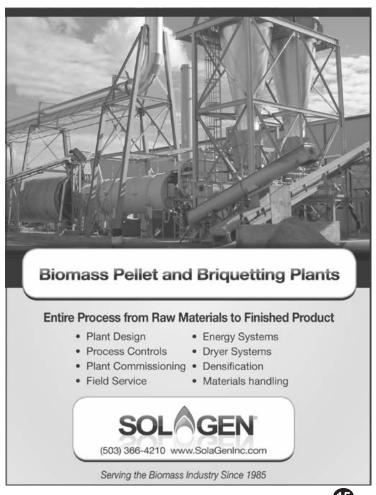
The HPBA Young Guns are mobilized and ready for action and we're looking for you to participate. If you are a member of PFI who is under 40 OR has been in the industry for less than five years, then you should get involved.

The Young Guns have these specific goals:

- 1. To raise awareness of our industries
- 2. To support education & networking regionally
- 3. To grow future leaders
- 4. To encourage new professionals to join the hearth and outdoor living industries
- 5. To meet like-minded people & have some fun

We believe this group has limitless possibilities and look forward, with your ideas, to many years of Young Guns success. If you fit the bill, get on board! Send a note to youngguns@hpba.org to get involved and receive our monthly newsletter.

Jamie Beaulieu, Director of Membership & Affiliates, HPBA





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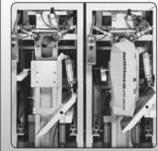


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Pellet Stove Efficiency – the "Other" NSPS Issue

By: John Crouch, PFI Director of Public Affairs

By now, all PFI members understand

that key drivers in the adoption of our new third-party fuel certification program was the U.S.

Environmental
Protection Agency's
(EPA) plan to certify
all pellet burning
stoves, furnaces and



John Crouch, PFI Director of Public Affairs

boilers, as part of their revision of the New Source Performance Standard (NSPS) for Residential Wood Heaters and their desire to require the use of certified fuel. On the other hand, only a few members understand the other potential issue for pellet stoves in this NSPS revision: efficiency.

The original concept for appliance efficiency floated by EPA staff was that, in addition to uniform emission testing and certification, all pellet appliances would receive uniform efficiency testing, which would then be disclosed to the public. This approach would acknowledge that there has never been any standard third-party-verified approach to appliance efficiency. The data would then establish a public database which might allow EPA, during the next NSPS revision, to pick an efficiency target.

Then, last year, EPA staff began talking about an efficiency target, in addition to an emissions target, for all wood burning appliances. Although everyone agrees that efficiency is important, there are three issues that pose potential difficulties for pellet fueled stoves, boilers and furnaces.

1) The New Test

ASTM Test method E-2779 is a new test method designed specifically for pellet stoves. It has three distinct burn settings, and, like the woodstove method, averages the results of those three power outputs using a weighting scene designed to reflect usage patterns in the real world. The committee that developed this method, which reflected manufacturers, testing laboratories, and government interests, worked hard to select a weighting scheme that would result in a solid and representative emission value. Unfortunately, there was little focus on this weighting scheme and efficiency, since, at that time, no one contemplated that efficiency would be mandatory.

2) The Air Wash

North American pellet stoves tend to have larger glass than European units. To keep this glass clean, the North American industry has adopted a strategy first used in early glass fronted woodstoves: an air wash. Some air is sucked into the unit from the top area of the glass, and serves as an air curtain to keep smoke away from the glass. This keeps the glass clean without requiring complicated air channels to direct air to the top of the door, as is now done in woodstoves. Efficiency calculations tend to exact a penalty for "excess air", since that typically reflects inadequate combustion. In a pellet stove, the air wash air enters after the combustion process, so it is not truly excess air from a traditional standpoint. It probably does tend to penalize heat exchange, since the system has to carry all the additional air up the flue.

3) Higher Heating Values (HHV) vs. Lower Heating Values (LHV)

When the IRS issued guidance for the biomass

Pellet Stove Efficiency – the "Other" NSPS Issue, continued from page 17

appliance tax credit in 2009, they did not take a position on which process for determining efficiency in wood burning appliances should be used. As a result, most manufacturers used the LHV and certified that they could achieve the 75% efficiency target during steady state operation. Lower Heating Value is traditionally used for solid fuel efficiency measurement in Europe. It does not count the energy used by the fire to drive out the water from the fuel.

While that is not a major issue for wood pellets, which have considerably less moisture than unprocessed biomass (firewood), it can be important at the margins.

Since the EPA is considering requiring 70% HHV, all of these issues together may mean that many of the North American pellet stoves

will have to be redesigned. While improvements were anticipated over time, as the market began responding to the inclusion of consistent efficiency results as part of the EPA label, the mandatory use of an efficiency target will force dramatic changes over night.

Pellet stoves will still be around, but the appliance industry will have to drop everything and redesign a part of their product line that was previously expected to evolve slowly, as consumers considered efficiency as just one of several product attributes. This change is far from a done deal but HPBA is working hard to show that the original plan-- consistently measured and publicly revealed efficiency numbers-is still the best path forward.



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GISTRATION TYPE (Registration includes con	ference meetings	s, receptions, lu	nch, breakfasts, Monday eveni	ng dii
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Fiber Resources / BBQr's Delight	Steve Holland	Pine B	luff, AR	(870)535-1759	www.heatresource.com				
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Hassell & Hughes Lumber Company	Jonathan Littlejohi	n Colliny	ood, TN	(931)724-9191	www.greenwaypellets.com				
Henry County Hardwoods	John Neese	Paris,	TN	(731)642-4181					
Indeck Energy Services, Inc.	Nunzio Maniaci	Buffalo	Grove, IL	(847)520-3212	www.indeck-energy.com				
Inferno Wood Pellet Inc.	Gilbert Lopes	Taunto	n, MA	(508)824-4834	www.infernowoodpellet.com				
JF Rohrbaugh Co., Inc.	Michael Smith	Hanov	er, PA	(717)632-4353	www.jfrohrbaugh.com				
Kirtland Products	Tom Monley	Hollan	d, MI	(231)582-7505	www.kirtlandproducts.com				
Koetter and Smith, Inc.	Nathan Smith	Border	n, IN	(812)923-5111	www.koettersmith.com				
Lee Energy Solutions	Davis Lee, Sr.	Crossy	rille, AL	(256)528-7290	http://leeenergysolutions.com/				
Lignetics of West Virginia, Inc	John Utter	Glenvi	le, WV	(304)462-4848	www.lignetics.com				
Lignetics, Inc.	Kenneth Tucker	Sandp	oint, ID	(208)263-0564	www.lignetics.com				
Maine Woods Pellet Co LLC	Bob Linkletter	Athens	, ME	(207)654-2237	www.mainewoodspelletco.com				
Nature's Earth Pellet Energy LLC	Jana Simard	West F	alm Bch,FL	(561)688-7393	www.freedomfuelusa.net				
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O'Malley Timber Products, LLC	Matt O'Malley	Tappal	nannock, VA	(804)445-1118	www.omalleywoodpellets.com				
Ozark Hardwood Products, LLC	Scott Jacobs	Seymo	our, MO	(417)935-9663	www.ozarkhardwoodproducts.com				
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Somerset Pellet Fuel	Troy Jamieson	Somer	set, KY	(606)678-2842	www.somersetpelletfuel.com				
Southern Indiana Hardwoods, Inc.	Gene Merkley	Huntin	gburg, IN	(812)326-2053	www.sihlumb.com				
Southern Kentucky Hardwood Flooring	Blake Gerughty	Gamal	iel, KY	(270)457-3618					
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Turman Hardwood Pellets	Ruth Elliott	Freder	icksburg, VA	(540)287-2976					
Varn Wood Products	George Varn	Hobok	en, GA	(912)458-2187					
Westervelt Renewable Energy	Mike Williams		oosa, AL	(205)562-5670	www.westerveltenergy.com				
West Oregon Wood Products, Inc.	Christopher Sharr		-	(503)397-6707	www.wowpellets.com				
Wood Fuel Developers, LLC	Steven Gordon	Cheste	er, VA	(804)414-1101	www.woodfueldevelopers.com				

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Company	Contact	Location	Phone	Website)
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Bliss Industries, LLC	Chad Cook	Р	onca City, OK	(580)765-7787	www.bliss-industries.com
BM & M Screening Solutions	Collin Jackson	S	Surrey, BC	(800)663-0323	www.bmandm.com
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FLAMEX Inc.	Allen Wagoner	G	Greensboro, NC	(336)299-2933	www.flamexinc.com
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