

COLLABORATION WITHIN THE WOOD FUEL SUPPLY CHAIN

READY FOR TAKE OFF?

Tomintoul, 17/11/06

The delegates split into 4 groups and discussed the issues and challenges currently faced by the woodfuel industry in Scotland. The facilitator of each group then reported the factors they had identified and these were summarised as follows:

Factors inhibiting the growth of the biomass industry in Scotland

- Low prices of oil and gas
- Reliability of current systems
- Moisture content of raw material (need for drying time causing delay in profit)
- Long-term reliability of fuel supply
- Right boiler – right place
- Efficient methods for drying
- Mismatch of scale of forest operations and fuel need
- Haulage
- Lack of professionals (whole supply chain)
- Lack of cooperation between estates
- Economics not yet clearly demonstrated
- Lack of access to information (boilers and wood resource)
- Government strategy not fully reflected at local level
- Local authorities tied to competitive tendering
- Scale required for financial feasibility
- Cost of installations
- Public perception is that supply is complex
- Risk management
- Technology transfer
- Logistics
- Specialisation and training
- Government responsibility for training
- Seasonal variation in demand

The 4 groups then discussed possible solutions and requirements under 4 different headings:

1. Information (including training)

- Dissemination – need for an independent first port-of-call for information (poss. web-based)? This should be for all renewables.

- Training – industry recognised quality assurance accreditation
 - need for more available accredited installers (these two points need to be integrated into colleges etc)
 - need to increase awareness in services industry (training for employers and businesses). Manufacturers should be obliged to fund this
- Education – local authorities, public sector, architects and developers need to be shown examples of good practice. A map should be produced showing working examples. Scottish Executive should lead on this (all renewables)

2. Costs and government support

- Single policy source – consistent signals etc.
- Local authorities should lead the way
- Long-term contracts leading to reliability
- Wider opening of the market to more boiler manufacturers
- Government support – fiscal measures to regulate carbon usage etc.

3. Quality (moisture content, supply security etc.)

- On-time, in-full service
- Checklist based system for supply chain
- Coordinated, joined-up thinking
- Improve information sourcing
- Promotion of existing standards (CEN TS 961 etc.)
- Matching of available fuel to boiler systems
- Appropriate review and amendment of standards

4. Lack of cooperation

- Confidence building is required in several areas:
 - information flow throughout industry
 - need for risk management (sharing risk will build confidence and cooperation)
 - look at individual needs of big users and small users