



PELLET FUELS INSTITUTE

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www.pelletheat.org

2012-2013 Issue #4

Newsletter

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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- **The PFI Year in Review and Look Ahead,** page 9
- **Conference Committee Update,** page 14
- **HPBExpo Preview,** page 16

President's Message

The oft-asked question in the pellet industry is "how do I sell more fuel?" Ours is an industry that is dependent on a number of factors, many of which we have little control over: the weather, the price of other fuels, the overall health of the economy. In the end, it boils down to supply and demand, Economics 101. We, as an industry, have done a much better job on the supply side in recent years. The regional "short-ages" (really more of a case of enough fuel, just not located where it was needed) of 5-7 years ago seem like a distant memory. Indeed, a lot of new production has come online to serve the domestic market, as well as the growing export market.



Scott Jacobs, PFI President

Our industry has matured in many ways, including the adoption of more meaningful fuel standards, open to all wood pellet manufacturers, and mobilizing a more robust government affairs effort, leading to such milestones as the Section 25c biomass appliance tax credit and the increased collection of data on wood-use by the Energy Information Administration (EIA). Often, the gears of government turn very slowly and legislative and regulatory victories such as those mentioned above seem rare or are less tangible. This is especially true for those of us who are more concerned with making sure that our plant can move enough product to continue running two shifts, or who wonder where we can find a customer for a hammer mill or dryer as the economic recovery slogs along.

I can't promise that writing your congressman, attending one of PFI's Washington, DC fly-ins, or inviting your local elected official for a site visit will mean that you sell out of product for the year. What I can tell you is that these, and all of PFI's government affairs efforts, are an important part of setting the stage for a healthy and growing industry. First off, we must consistently defend the pellet industry's right to do business free from onerous regulation. There is a small segment out there that assails the burning of biomass as "worse

continued on page 6

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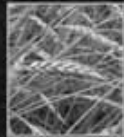
CALENDAR OF EVENTS

Do you have an item for the Calendar of Events? Email it to berthiaume@pelletheat.org

March 14, 2013	PFI Membership Breakfast Orange County Convention Center Orlando, FL www.pelletheat.org
March 14-16, 2013	HPBExpo 2013 Orange County Convention Center Orlando, FL www.hpbexpo.com
April 3-5, 2013	Northeast Biomass Heating Expo Saratoga Springs, NY www.nebiomassheat.com
April 8-10, 2013	International Biomass Conference Minneapolis, MN www.biomassconference.com
April 24-26, 2013	Heating the Midwest Conference and Expo Carlton, MN www.heatingthemidwest.org
July 28-30, 2013	PFI Annual Conference The Grove Park Inn Asheville, NC www.pelletheat.org

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January 2013 MARKET UPDATE

Producer Comments:

“Prices need to increase and stronger markets need to develop.” –Northeast

“Busy! We are making up for the slow start to this heating season. Raw material has been sufficient all year, but I fear a slowdown in the wood industry this coming year.” –Midwest

“January is getting colder so maybe it will help things get started again.” -Northwest & Mountain

“Need cold weather to boost sales.” -Southeast

“Need winter to last another couple of months.” –Northwest & Mountain

WOOD PELLETS

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


United States:

Northeast: \$151-175 range. Manufacturers do not anticipate any price trend changes. Operating capacities range from 60-100%.

Midwest: \$130-169 range. Manufacturers report sufficient raw material availability and do not anticipate any price trend changes.

Southwest: \$150-169 range. Manufacturers report sufficient raw material availability. Operating capacities range from 30-100%.

Northwest & Mountain: \$150-169 range. Manufacturers report sufficient raw material availability. Most manufacturers do not anticipate any price trend changes.



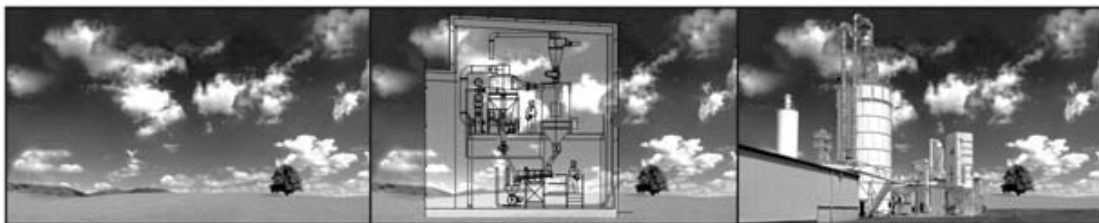
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President's Message, continued from page 1

than coal.” To them, there is no difference between pellets and other types of biomass, no difference between thermal, combined heat and power, and electrical production, and no difference between feedstock that results from residuals, responsible forest management or clear-cutting. They either don't know the economic and practical realities of our industry, or they choose to ignore them in order to seemingly strengthen their position. If we allow these fringe groups to go unchallenged, or allow them to paint biomass with an impossibly large brush, than we have already lost, without even showing up to the game.

Fortunately, we know what our industry has to offer in terms of renewability, sustainability, job creation and affordability. PFI members and staff have very effectively communicated that message to state and federal elected leaders and officials with agencies such as the Department of Energy, Department of Agriculture, Council on Environmental Quality, and so many more. But this dialogue must continue if we want new markets to open up, and existing markets to grow. The extension of the Section 25c biomass appliance tax credit, which provides a 10% credit, up to \$300, for the purchase of a 75% efficient heating stove is a good starting-point for stimulating residential demand. What about demand in other sectors?

Did you know that the Department of Defense is the nation's single largest energy user? The DOD will be required to source or procure 25% of its total facility energy use from renewable sources by 2025. There are plenty of military facilities that can go a long way to meeting this goal by switching from fossil fuel heat to wood pellets. That being said, DOD is not going to seek us out. We must continue to bring the story to them and not only tell them about the benefits of heating with wood pellets, but *show* them that it can be done, right here, right now!

Beyond the DOD, the federal government as a whole has outlined renewable energy and energy efficiency goals, embodied in the Energy Independence and Security Act of 2007 and Executive Order 13423. According to the *New York Times*, “the [federal] government owns or manages 900,000 buildings...making it the nation's largest landlord.” Many of these buildings are located in rural areas, without access to natural gas lines. Could you imagine if just 1% of federal buildings were converted over to pellet heat? That would be a lot of pellets sold, and a lot of savings for the government and you, the taxpayer.

These are just a few examples why our dialogue with federal agencies and officials is so important. Equally as important is reaching out to officials at the state and local level. This is an area where PFI and its members must also work together very closely. As our membership is spread throughout the country, it gives us an opportunity to affect policy in many different states. PFI must educate its members not only on the value of grassroots involvement, but also the best practices for doing so. Federal policy is often shaped from successful policy at the state level, so the work done locally can payoff exponentially. I would encourage you to reach out to me or the PFI staff if you are interested in becoming more involved in advocacy for the pellet fuel industry. Perhaps you can join the Government Affairs Committee, or sign up for one of PFI's Washington, DC fly-ins. If there is enough interest, we might be able to organize a government affairs boot camp of sorts, to train our next generation of advocates.

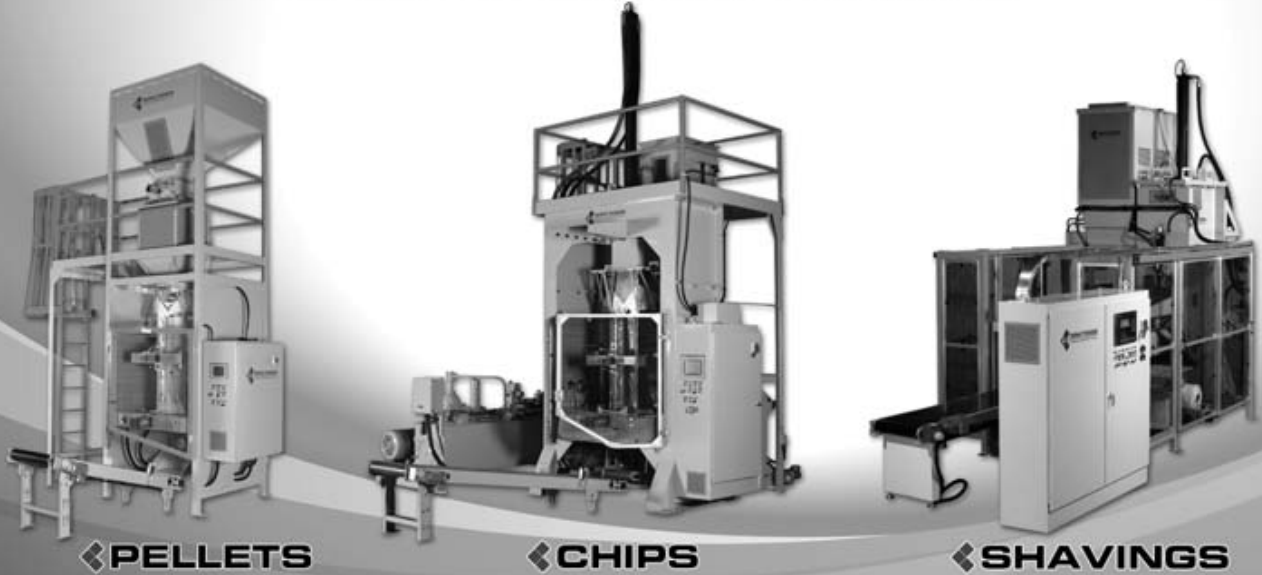
Thanks for allowing me to stand on my soap-box for a bit. I welcome any feedback that you have and hope that the recent round of cold weather has everyone fired up.

president@pelletheat.org



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Image of the Issue

PFI members met with Rep. Cathy McMorris Rodgers (R-WA) during the PFI Fly-in in December. McMorris Rodgers is a member of the House Energy and Commerce Committee and was recently elected Chair of the House Republican Conference, the fourth-ranking position in the House Republican leadership.



Pictured (from l-r): John Utter, Kenny Lisle, McMorris Rodgers, and Dan Henry

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

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The PFI Year in Review and Look Ahead

By: Jennifer Hedrick, Executive Director

As we enter our 29th year as an organization it is important to pause and reflect on the past year while pressing forward with the association's agenda and goals for 2013.

I wrote previously of PFI's plan in 2012 to increase the reach of the association while growing awareness of the industry and the benefits of utilizing densified biomass. This has been an underlying goal of your leadership throughout the past year and will continue to be in 2013.

We received invitations to participate in conferences throughout North America, and sat on panels at the Pacific West Biomass Conference, Washington State University's Wood Composite Symposium, the Small Wood Conference, the International Biomass Conference, ACORE's renewable energy technology conference, RETECH, and the Pennsylvania Biomass Energy Association's inaugural conference. For the first time we had a speaking opportunity at the Italian Pellet Forum, where there was much interest in the U.S. pellet market and the activities of PFI. We attended a host of other events including the Northeast Biomass Heating Expo, and the U.S. Industrial Pellet Association's annual conference.

The point is not simply to attend these conferences—as you well know there is no shortage of conferences—rather, to glean information about new technologies, interact with PFI members and potential members and look for opportunities to grow businesses through expanding markets or public policy.

We have a full conference plate in 2013, beginning with a trip to the World Sustainable Energy Days in Wels, Austria, where I will be representing the U.S. on a panel discussion on

the world pellet market. I look forward to seeing so many of you there.

Our own conference continues to be a significant deliverable for the association and the main occasion to draw industry together during the year. In 2012 we returned to the northeast after an eight-year absence and held the conference at Foxwoods Resort & Casino for the first time. The Conference Committee assembled a strong program, with sessions focusing on mill safety, developing markets, state and local advocacy, the export market and standards.

We were honored to have Christiane Egger of Austria's O.O. Energiesparverband provide the keynote during which she highlighted the innovation in Austria's pellet market and the country's commitment to a stronger renewable energy portfolio, of which pellets are a significant contributor.

One of our goals as an association in the year ahead is to build a stronger conference encompassing broader industry involvement and pursue opportunities to expand and attract broader industry representation, branch out to new markets, and provide a richer networking experience for all attendees.

Development of the 2013 conference has been in the works for several months. As you'll note in the committee report found on page 14 of this newsletter, the committee is seeking speakers to fill our 1.5 day conference program. Consider speaking, inviting a colleague to speak or suggesting speakers that the committee may want to consider. Please email or call staff with your recommendations. More information on conference registration, exhibiting and sponsorship opportunities will be available this spring.

I hope you read Scott Jacobs' thoughtful article

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Year in Review, continued from page 9

about PFI's government affairs initiatives in 2012. The association continues to prioritize the protection and growth of your businesses. Though the political climate is contentious and will remain so in 2013, we capitalized on opportunities to reinstate the biomass appliance tax credit that expired in 2011 and worked with others—HPBA, BTEC, the Alliance for Green Heat, Hearth & Home Technologies—to secure more emphasis on residential wood heating in the Energy Information Administration's (EIA) Short-Term Energy Outlook.

The PFI Standards Program remains a significant focus of the association, industry and the U.S. EPA. In 2012, three companies announced formally that they were preparing their mills for enrollment in the PFI Standards Program and are expected to enroll in the program in the months ahead. Other mills are following suit. As expected, election year politics has delayed the release of the draft New Source Performance Standard for Residential Wood Heaters (NSPS), in which the PFI standard is expected to be referenced. We have been told by the EPA to expect a mid-2014 release of the draft, which we will share with you as soon as it becomes public and available for comment.


We encourage you to read more about the standards program and how to enroll. Currently, it remains a voluntary program; however, with the implementation of the NSPS it is expected to require that stove owners burn only pellets that are accredited through the PFI Standards Program. More information on standards can be found on the PFI website: www.pelletheat.org/pfi-standards/.

Finally, we will continue our push to collect data on the pellet market through our monthly industry survey conducted with RISI. Thanks to many of you who are responding to this survey

regularly. For those of you who aren't, please make participation a goal for 2013. You will not only receive the survey summary from RISI but help us build a representative data set that we can use to gain more support from policy makers.

As we look to the year ahead, we seek to build on the accomplishments of 2012 and further advance this industry. The development of new markets and the pursuit of a level playing field in the policy arena is key to this growth. We encourage you to make the most of your membership and get involved in the variety of opportunities available—through volunteering, attending events or providing comment to staff or volunteer leadership on areas of potential improvement or collaboration. We look forward to working with you in 2013!

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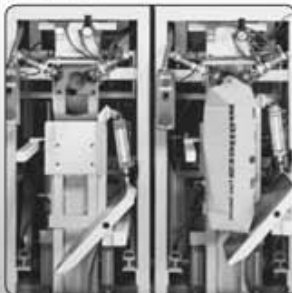
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Conference Committee Update

Have you made plans to attend Breakfast and Biomass: A Briefing on the Pellet Market? For the first time, PFI will hold a breakfast at HPBExpo. The breakfast will highlight the information you've received in past years at the PFI Membership Luncheon—policy updates from Washington, DC and the latest numbers on the stove market from HPBA's Director of Market Research, Don Johnson, along with an appliance manufacturer's perspective from John Shimek of Hearth & Home Technologies. PFI President, Scott Jacobs, will kick off the breakfast with a report on PFI and upcoming activities.

You may register by using the form found on page 13 or through the HPBExpo website: HPBExpo.com/register. Sponsorship opportunities are still available! Contact PFI staff for more information or visit the event page on the PFI website: <http://pelletheat.org/events/>. The event is open to anyone attending the expo, taking place March 14-16 in Orlando, FL. We hope to see you there!

We're counting down to the opening of registration for the PFI Annual Conference. If you've never attended a PFI Annual Conference before, I'd encourage you to try us out this year. We will be returning to The Grove Park Inn in Asheville, NC, an outstanding conference venue and host of our very successful 2010 Annual Conference. More information on the conference, as well as activities for you and your family in Asheville, can be found on the PFI website: <http://pelletheat.org/events/pfi-annual-conference/>.

The Conference Committee is at work on the conference program and has put out a broad call for topics and will soon be issuing a call for speakers. Thanks to each of you for your recommendations for conference topics. If you have an interest in participating in the conference program or would like to recommend a speaker, please be in touch with PFI staff at pfimail@pelletheat.org.

Stephen Faehner and Troy Jamieson,
Conference Committee Co-chairs



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HPBExpo 2013 Preview

By: HPBA Expo Department

HPBExpo Registration Brochure and Program

The complete HPBExpo registration brochure was mailed in mid-December and is now available at:

<http://www.hpbexpo.com/attendees/registration-brochure/>.

If you have already registered, please be reminded that you can make changes or additions to your current registration, including signing up for Education and NFI Certification, using your email confirmation log in. The Education program is generously sponsored by long-time Expo supporter and exhibitor, ICC-RSF. The complete course schedule is available at:

<http://www.hpbexpo.com/attendees/registration-brochure/>.

For registration questions and information, please contact Rachel Pratt, pratt@hpba.org.

HPBExpo Hotel Accommodations

HPBExpo hotel reservations, airline flights and car rentals can be completed quickly and easily on line at:

<http://www.hpbexpo.com/housing-reservations/>.

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Entertainment and Fun at HPBExpo 2013

The second annual Outdoor Burn Tailgate & Big Green Egg Cook-off Competition will be held on Thursday, March 14th. Be sure to wear your team jersey, enjoy a beer at the sports bar and sample the savory offerings from participating exhibitors. The sports bar, a new feature in the

outdoor burn area, will broadcast the college basketball championship games throughout the three-day show. Local celebrity chefs will vie for the top honors in the EGGstravaganza cook-off sponsored by Big Green Egg. And, you can check out the latest tailgating gear in the Tailgate Pavilion sponsored by Tailgater Monthly. During this outdoor event, the second Donna H. Meyers Barbecue Leadership Award, sponsored by HPBA and Casual Living magazine, will also be presented.

The All-Industry Party

Don't miss the all-industry party being held at the House of Blues on Friday, March 15th, beginning at 7:30pm, following the Vesta Awards (transportation will be provided after Vesta from the convention center and from the hotels). The party will have musical entertainment by the Blues Brothers and Stir Crazy, as well as dueling piano performers. The entire venue will be ours for the evening! This event is an opportunity to let your hair down and have some fun with old and new friends while enjoying great food and spirits. Food stations will be set up throughout the venue that include barbecue ribs, pulled pork sandwiches, shrimp and grits, barbecue chicken and more (food tickets will be sold in advance on www.hpbexpo.com/show-info/parties-events/). The party is generously sponsored by Kozy Heat, M&G DuraVent, Napoleon Fireplaces & Grills, SBI, Travis Industries, Weber and the Salt Lake Convention & Visitors Bureau.



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Inferno Wood Pellet Inc.	Gilbert Lopes	Taunton, MA	(508)824-4834	www.infernowoodpellet.com
JF Rohrbaugh Co., Inc.	Michael Smith	Hanover, PA	(717)632-4353	www.jfrohrbaugh.com
Kirtland Products	Tom Monley	Holland, MI	(231)582-7505	www.kirtlandproducts.com
Koetter and Smith, Inc.	Nathan Smith	Borden, IN	(812)923-5111	www.koettersmith.com
Lee Energy Solutions	Davis Lee, Sr.	Crossville, AL	(256)528-7290	http://leeenergysolutions.com/
Lignetics of West Virginia, Inc	John Utter	Glenville, WV	(304)462-4848	www.lignetics.com
Lignetics, Inc.	Kenneth Tucker	Sandpoint, ID	(208)263-0564	www.lignetics.com
Maine Woods Pellet Co LLC	Bob Linkletter	Athens, ME	(207)654-2237	www.mainewoodspelletco.com
Michigan Wood Fuels LLC	Robert Oswald	Holland, MI	(616)355-4955	www.mipellets.com
Nature's Earth Pellet Energy LLC	Jana Simard	West Palm Bch, FL	(561)688-7393	www.freedomfuelusa.net
North Idaho Energy Logs	Clark Fairchild	Moyie Springs, ID	(877)564-4897	www.northidahoenergylogs.com
O'Malley Timber Products, LLC	Matt O'Malley	Tappahannock, VA	(804)445-1118	www.omalleywoodpellets.com
Ozark Hardwood Products, LLC	Scott Jacobs	Seymour, MO	(417)935-9663	www.ozarkhardwoodproducts.com
Pellheat Inc.	Peter Skrgic	Greensburg, PA	(724)850-8169	
Pennington Seed Inc.	Keith Hankins	Greenfield, MO	(417)637-5978	www.penningtonseed.com
Shaw Resources	Darrell Robinson	Shubenacadie, NS	(902)758-2095	www.shawresources.ca
Somerset Pellet Fuel	Troy Jamieson	Somerset, KY	(606)678-2842	www.somersetpelletfuel.com
Southern Indiana Hardwoods, Inc.	Gene Merkle	Huntingburg, IN	(812)326-2053	www.sihlumb.com
Southern Kentucky Hardwood Flooring	Blake Gerughty	Gamaliel, KY	(270)457-3618	
Spearfish Pellet Company	Everett Follette	Spearfish, SD	(605)642-2363	
Turman Hardwood Pellets	Ruth Elliott	Fredericksburg, VA	(540)287-2976	
Varn Wood Products	George Varn	Hoboken, GA	(912)458-2187	
Westervelt Renewable Energy	Mike Williams	Tuscaloosa, AL	(205)562-5670	www.westerveltenergy.com
West Oregon Wood Products, Inc.	Christopher Sharron	Columbia City, OR	(503)397-6707	www.wowpellets.com
Wood Fuel Developers, LLC	Steven Gordon	Chester, VA	(804)414-1101	www.woodfueldevelopers.com

PFI Associate & Supplier Members

Company	Contact	Location	Phone	Website
AgriRecycle, Inc.	Mike Ferguson	Bolivar, MO	(417)872-9175	www.agrirecycle.com
Amandus Kahl USA Corporation	Martin Johnson	Alpharetta, GA	(770)521-1021	www.akahl.us
Andritz, Inc.	Scott Shuman	Muncy, PA	(724)941-1416	www.andritzsproutbauer.com
Biomass Thermal Energy Ltd.	Bruce Lisle	Mifflintown, PA	(717)436-9300	www.thebiomassboiler.com
Biomass Thermal Energy Council	Joe Seymour	Washington, DC	(202)596-3974	www.biomassthermal.org
Bliss Industries, LLC	Chad Cook	Ponca City, OK	(580)765-7787	www.bliss-industries.com
BM & M Screening Solutions	Collin Jackson	Surrey, BC	(800)663-0323	www.bmandm.com
Bruks Rockwood Inc.	Steve Bennett	Alpharetta, GA	(678)994-0024	www.bruks.com
Buhler Inc.	Sven Lessmann	Plymouth, MN	(763)847-9900	www.buhlergroup.com
Bulldog Bag Ltd.	Neil Davies	Richmond, BC	(604)273-8021	www.bulldogbag.com
California Pellet Mill	Ron Fuller	Waterloo, IA	(319)232-8444	www.cpmroskamp.com
Certified Laboratories	Jim Rodgers	Irving, TX	(800)527-7850	www.certifiedlabs.com
Chantland MHS	Steve Hartmann	Humboldt, IA	(515)332-4045	www.chantland.com
Choctaw Cty Econ. Dev. Foundation	Nick Walters	Ackerman, MS	(662)285-3778	www.choctawcountymys.com
Coastal Equipment Sales	Bill Moran	Fleming Island, FL	(904)213-8019	www.coastalequipmentsales.com
Continental Biomass Industries	Ed Donovan	Newton, NH	(603)382-0556	www.cbi-inc.com
Conveying Industries	Bill Friday	Denver, CO	(877)600-4874	www.conveyind.com
CSX Transportation	John Murray	Jacksonville, FL	(904)366-4396	www.csx.com
Dorssers Inc.	Peter Timmermans	Blenheim, ON	(519)676-8113	www.dorssers.com
Evergreen Engineering	Aaron Edwards	Eugene, OR	(541)484-4771	www.evergreenengineering.com
Firefly AB	Ryan Morrow	Stockholm, SE	(468)449-2500	www.firefly.se
FLAMEX Inc.	Allen Wagoner	Greensboro, NC	(336)299-2933	www.flamexinc.com
Forest Business Network LLC	Craig Rawlings	Missoula, MT	(406)240-0300	www.forestbusinessnetwork.com
Hershey Equipment Co., Inc.	Richard Hyde	Lancaster, PA	(314)378-2693	http://hequip.com/
Jacobs Corporation	Charles Hoffnagle	Harlan, IA	(712)755-3131	www.jacobscorp.com
Kesco, Inc.	Jason Kessler	Fort Mill, SC	(803)802-1718	www.kescosolutions.com
Kice Industries, Inc.	Jeff Kice	Wichita, KS	(316)744-7151	www.kice.com
Laidig Systems, Inc.	Mike Schuster	Mishawaka, IN	(574)256-0204	www.laidig.com
Larson Engineering, Inc.	Paul Douglas	Norcross, GA	(770)279-6010	www.larsonengr.com
LM Machinery and Equipment LLC	Wladimir Labeikovskiy	Pittsburgh, PA	(412)608-8528	http://www.lm-machinery.net
M-E-C Company	Gary Follmer	Neodesha, KS	(620)325-2673	www.m-e-c.com
MoistTech	Adrian Fordham	Moorpark, CA	(805)378-1160	www.moisttech.com
Mollers North America	Tom Wagner	Grand Rapids, MI	(616)942-6504	www.mollersna.com
MVTL Laboratories	Jeff Reiser	Bismarck, ND	(701)258-9720	www.mvtl.com
Northeast Lumber Manufacturers Assoc.	Jeff Easterling	Cumberland, ME	(207)829-6901	
Pacific Lumber Inspection Bureau	Jeff Fantozzi	Federal Way, WA	(253)835-3344	www.plib.org
Package Research Laboratory	David Dixon	Rockaway, NJ	(973)627-4405	www.package-testing.com
Premier Tech Chronos	Francois Kirouac	Riviere-du-Loup, QC	(418) 868-8324	www.ptchronos.com
Price LogPro, LLC	Josh Krauss	Hot Springs, AR	(800)286-7803	www.logprollc.com
Primary Packaging Inc.	Duff Long	Bolivar, OH	(800)774-2247	www.primarypackaging.com
Process and Storage Solutions	Donald Land	Rainsville, AL	(256)638-1838	www.processandstorage.com
Prodesa North America Corporation	Jose Ignacio Pedrajas	Alpharetta, GA	(770)-849-0100	www.prodesa.net
Rethceif Packaging	Tim Fiechter	Ossian, IN	(260)622-7200	www.rethceif.com
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Solagen Incorporated	Francis Sharron	Deer Island, OR	(503)366-4210	www.solageninc.com
Thomas Enterprises Inc.	Tom Weihe	Dublin, OH	(614)793-9432	
Timber Products Inspection	Chris Wiberg	Conyers, GA	(770)922-8000	www.tpinspection.com
Trinity Packaging Corporation	John Ericson	Armonk, NY	(800)999-3970	www.trinitypackaging.com
TS Manufacturing	Riley Smith	Lindsay, ON	(705)324-3762	www.tsman.com
Twin Ports Testing, Inc.	Gregg Patterson	Superior, WI	(715)392-7114	www.twinportstesting.com
University of New Brunswick	Michael Albright	Fredericton, NB	(506)453-4507	www.wstc.unbf.ca
Wood Pellet Association of Canada	Gordon Murray	Revelstoke, BC	(250) 837-8821	www.pellet.org

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