



Mapping of EU industry and biorefineries

Market acceptance – results of an industry survey

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Biorefinery workshop
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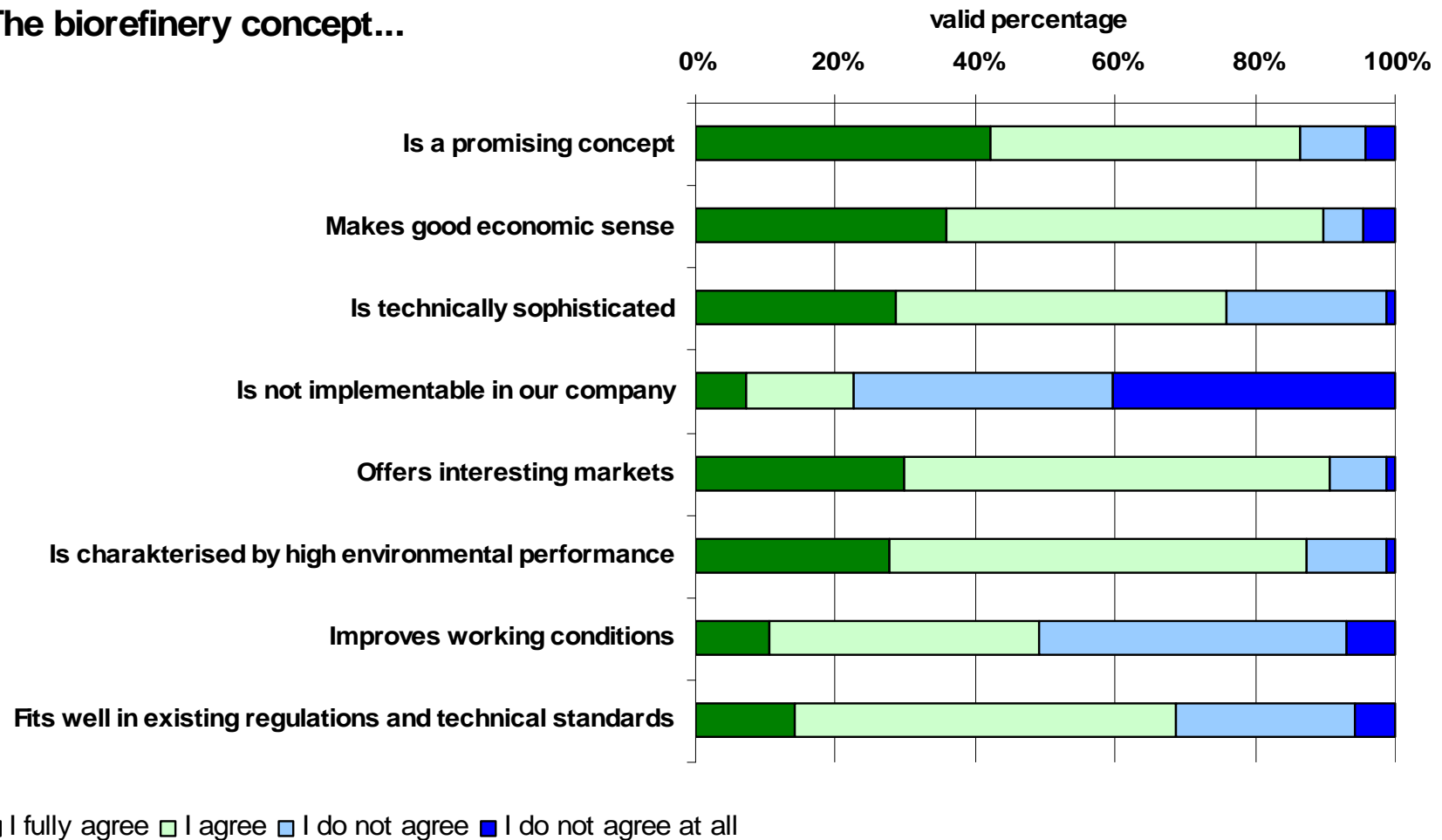
Outline

1. Introduction
2. Market acceptance of biorefinery concepts – results of a survey amongst industrial actors
 - 2.1 Evaluation of biorefinery concepts
 - 2.2 Benefits, challenges and barriers of biorefinery concepts
 - 2.3 Necessities for accelerating the adoption of biorefinery concepts
3. Summary/ conclusions

Results of the industry survey

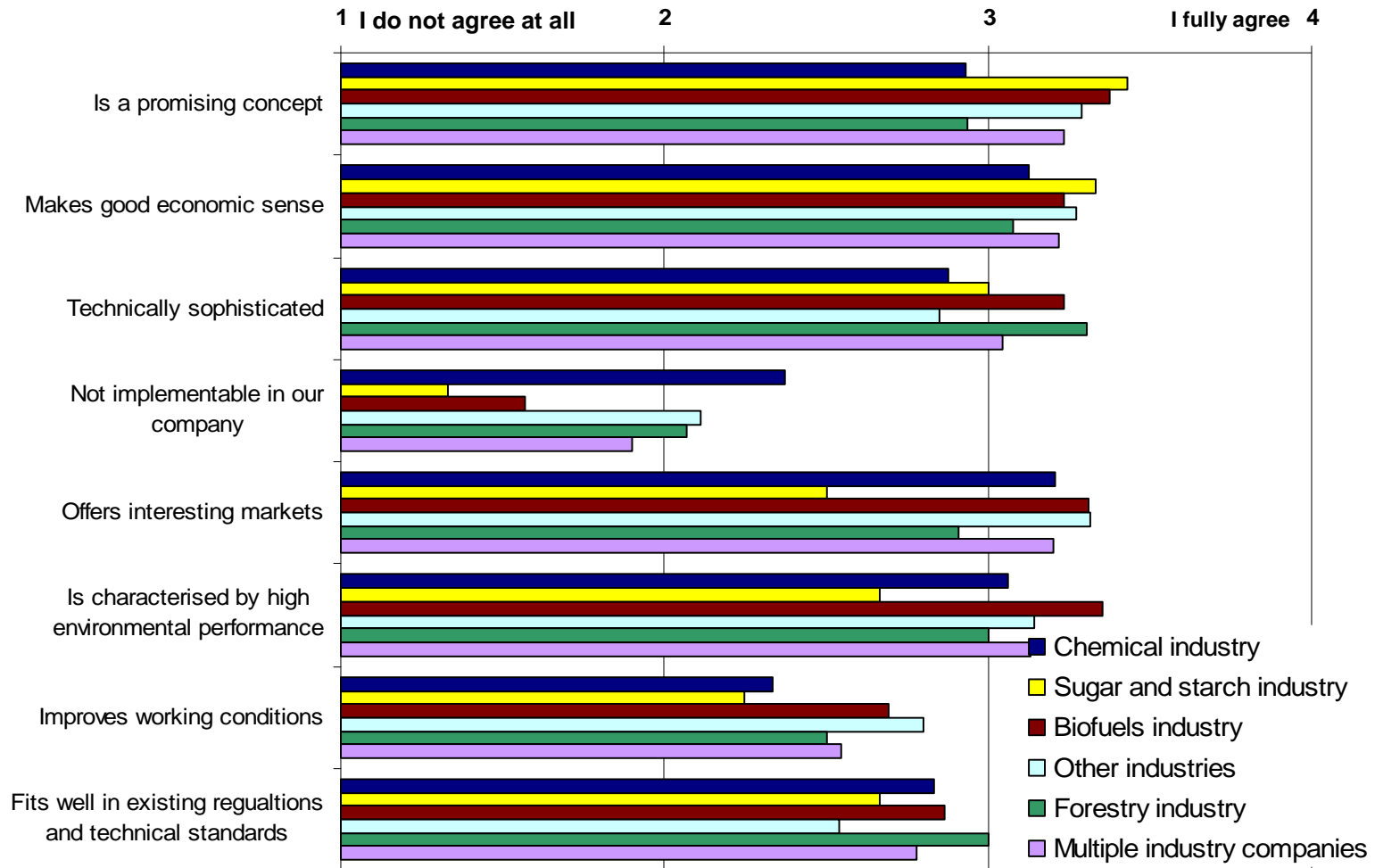
- Evaluation of biorefinery concepts

The biorefinery concept...



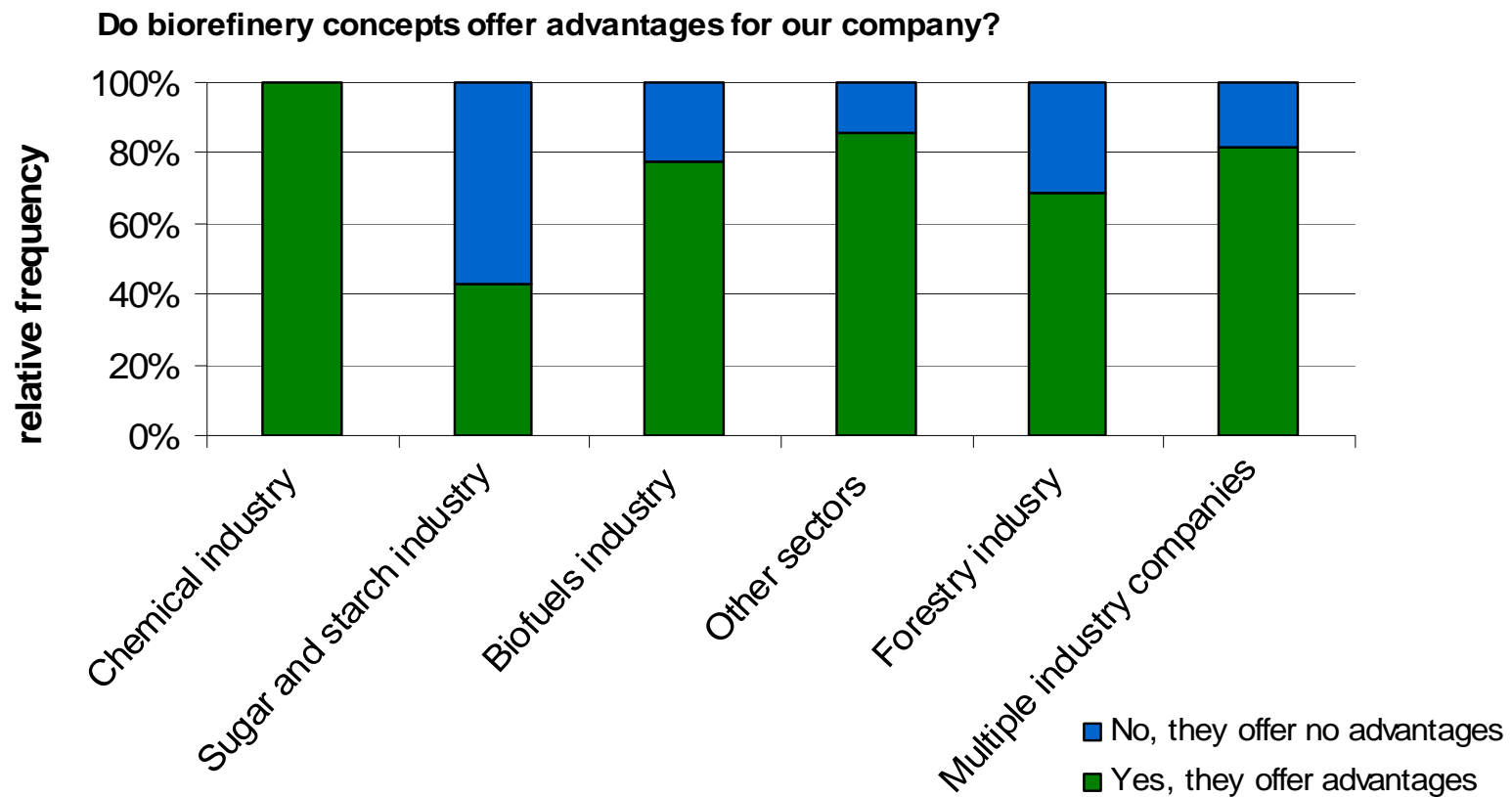
► Evaluation of biorefinery concepts by industrial sector

The biorefinery concept...



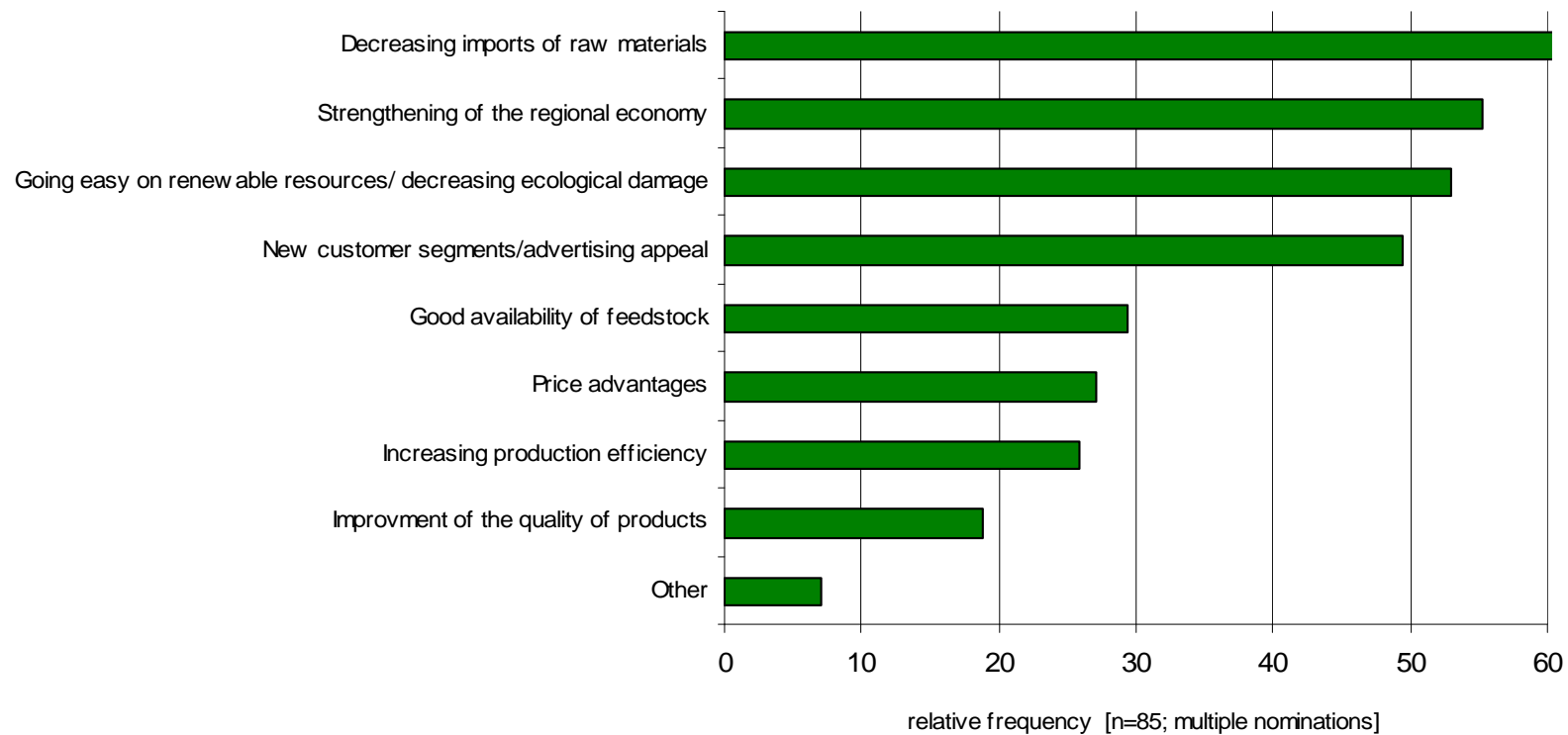
► Benefits, challenges and barriers

- Benefits of biorefinery concepts by industrial sector



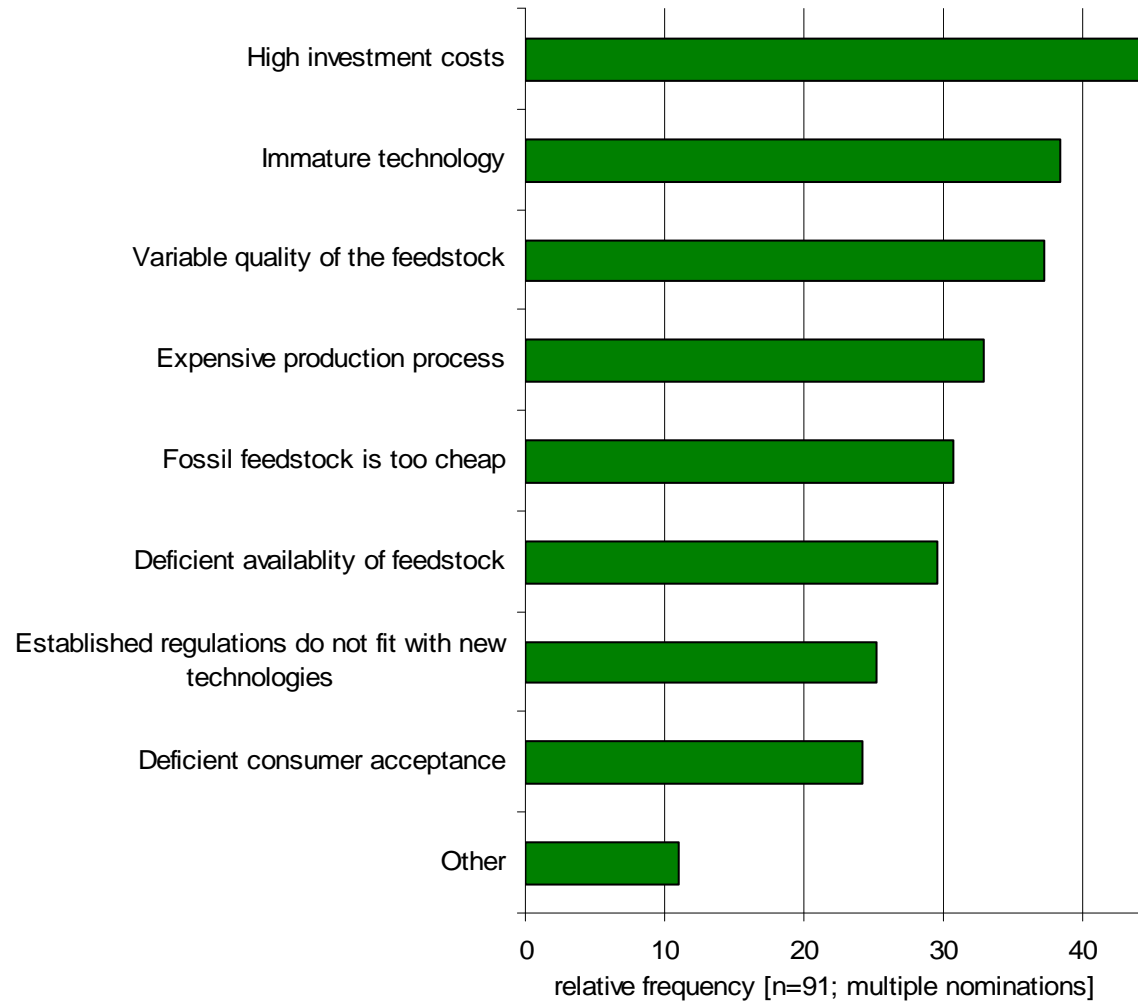
► Benefits, challenges and barriers

- Benefits of biorefinery concepts



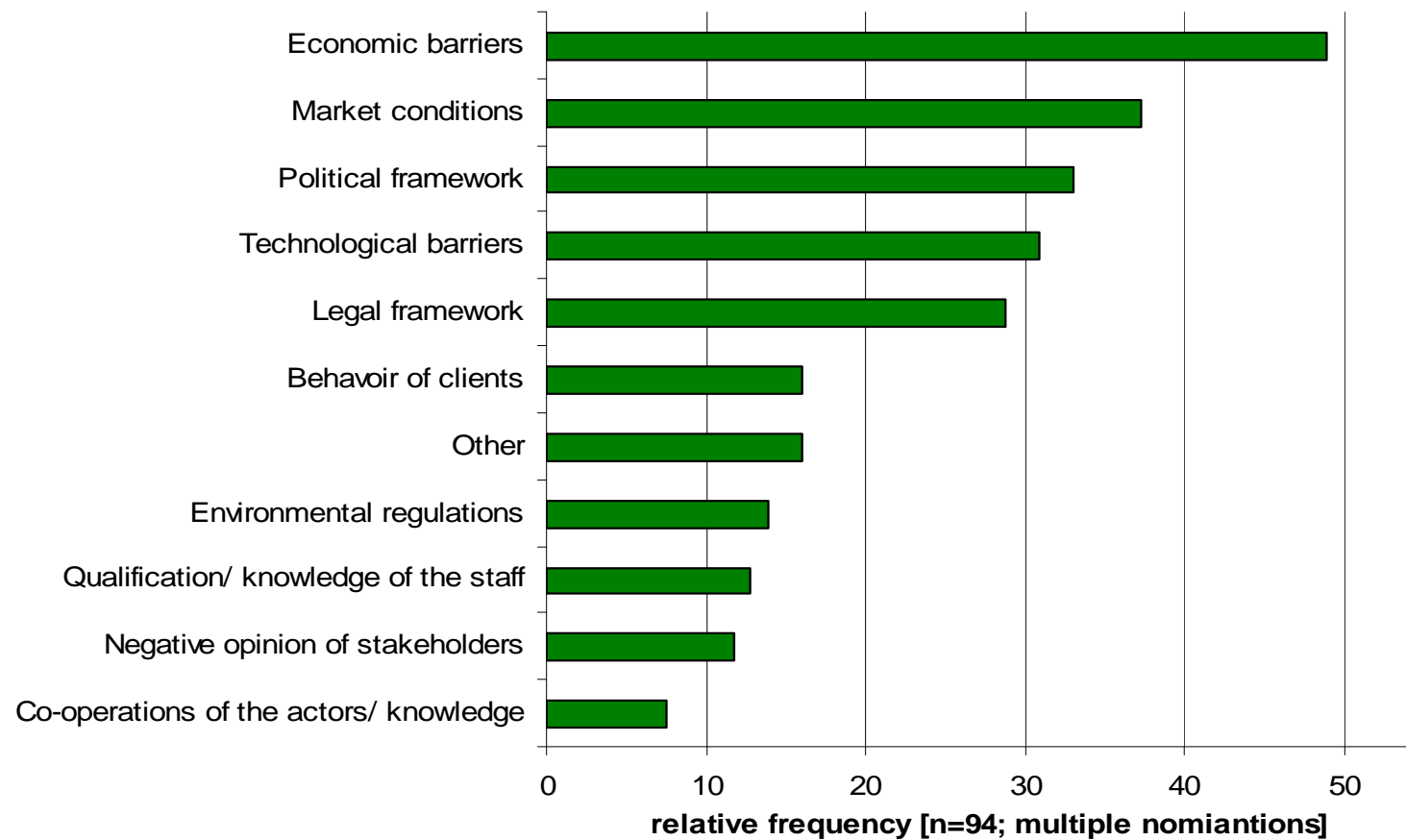
► Benefits, challenges and barriers

- Problems of biorefinery concepts



► Benefits, challenges and barriers

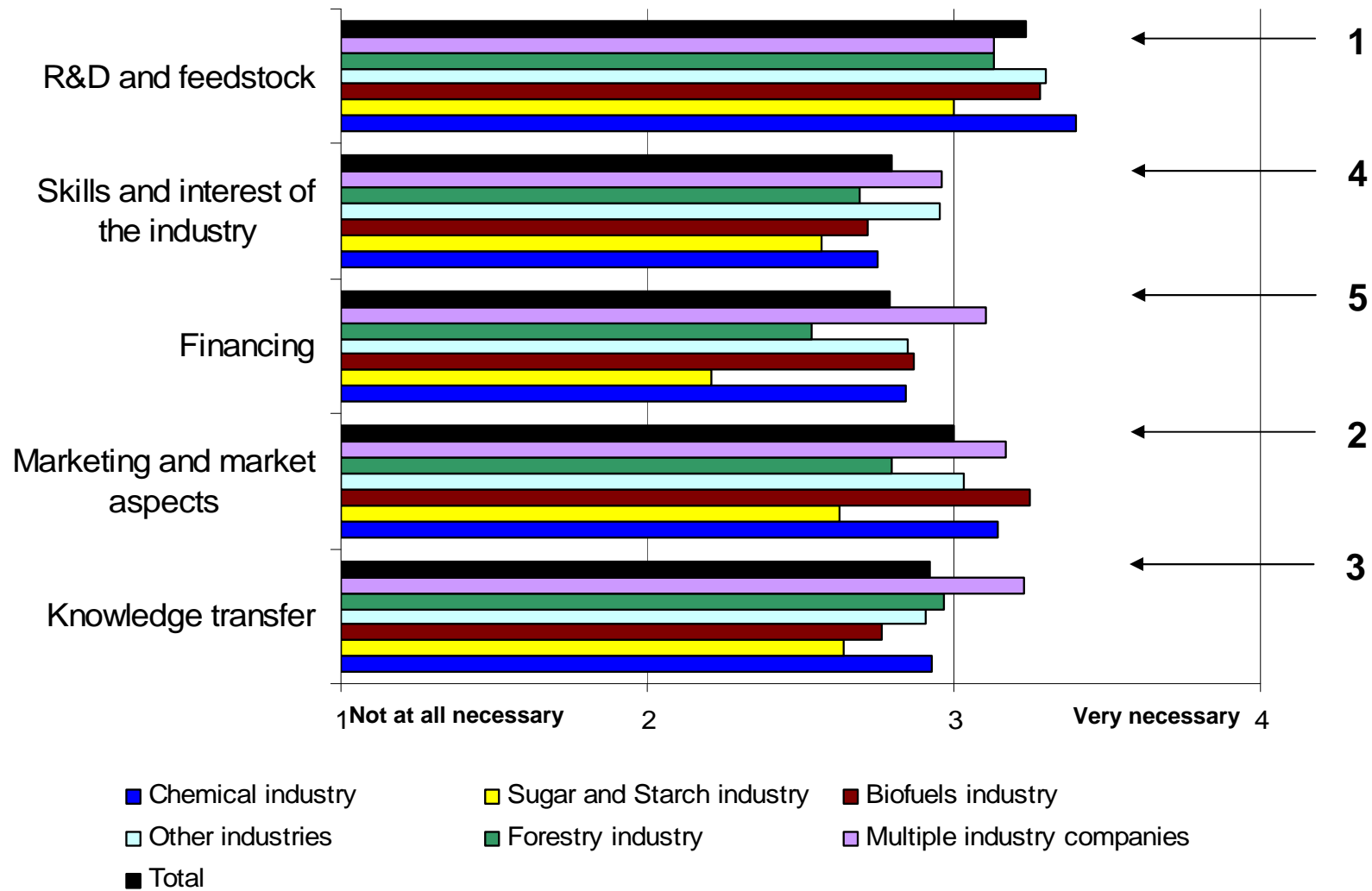
Barriers for the development of biorefinery concepts:



▷ Necessities for accelerating biorefineries

- Factor analysis on the basis of 13 rated statements
- Identified factors, which are necessary for accelerating the adoption of biorefinery concepts:
 - R&D and feedstock
 - Marketing and market aspects
 - Knowledge transfer
 - Skills and interest of the industry
 - Financing

► Necessities for accelerating biorefineries



▷ Summary / Conclusions

Survey

- Small number of companies in sample (110)
- Overrepresentation of answers from German companies, but results show interesting tendencies

Assessment of the surveyed companies

- Evaluation of the biorefinery concepts
 - Overall positive evaluation
 - Consistency of the answers
 - Probably mainly interested companies or companies with a positive attitude answered (small sample number)

▷ Summary / Conclusions

- Benefits: decreasing imports, regional economies, ecology, new markets
- Challenges: costs, technology and feedstock quality
→ Typical „early stage“ problems
- Barriers: mainly economic and market issues
- Necessities for accelerating the adoption of biorefinery concepts show: „a lot of work“ is necessary in almost all identified fields

▷ Summary / Conclusions

➔ Many issues have to be discussed further

Afternoon session C: „Key issues for industry acceptance“