#### Joe O'Carroll

#### Market opportunities for wood in renewable energy



Joe O'Carroll, a forestry graduate from UCD and a masters graduate from UCC, set up OC Consulting in 2005 following five years as operations manager with COFORD (National Council for Forest Research & Development). OC Consulting provides management services for Imperative Energy Ltd., in developing 70 biomass projects in the UK and Ireland. It has also been involved with the creation of international forestry funds.

The EPA confirmed last week that Ireland will not meet its greenhouse gas (GHG) emissions targets and this will ultimately lead to the State paying a financial penalty. This is despite the enduring levels of depressed economic activity. The nation's addiction to imported fossil fuels shows no sign of abating – Ireland relies heavily on fossil fuels (95% of total primary energy requirement) and has 88% import dependence for all fuels.

The old adage that the world economy couldn't sustain crude oil prices above \$50 per barrel has long since been scrapped. Brent Crude hasn't been below \$100 per barrel for more than a few weeks since mid-2010, despite global economic recession.

The main volume user of biomass for energy generation is the co-firing of Semi-State owned peat burning power stations. While this has obvious carbon reduction merits, this demand seems set to be predominantly satisfied with imported biomass. In ironic defiance of this appalling situation:

- this week also sees numerous schools across rural Ireland issue tenders for the provision of oil boilers
- Despite "Green Public Procurement" sound bites, too many Public bodies continue
  to avoid looking at low carbon alternatives and are fixated on driving down fuel
  costs rather than looking at longer term energy efficiency and renewable energy
  projects
- It is still possible to get capital grants for "high efficient oil and gas boilers" but not for biomass boilers

On the positive side, SEAI has outlined its primary objectives as being:

- Energy efficiency first implementing strong energy efficiency actions that radically reduce energy intensity and usage;
- Low carbon energy sources accelerating the development and adoption of technologies to exploit renewable energy sources;
- Innovation and integration supporting evidence-based responses that engage all sectors, supporting innovation and enterprise for our low-carbon future.

It is making really meaningful strides in pursuit of these objectives and this year has seen the launching of the Energy Efficiency Fund and the development of precedent Local Energy Supply Contracts, both of which will definitely support growth in the biomass to energy sector. New biomass projects at Pharma and Food companies over the past two years is a trend that will continue and these projects typically use locally sourced biomass from thinnings and sawmills.

The potential for this type of project is significant and with the right supporting environment could stimulate demand for over 1 million tonnes of biomass within the next few years. All of this would be sourced in the locality of these installations with a resulting lower transportation cost and higher price paying potential than the traditional outlets for such material.

The Irish forest resource is a wonderful asset with myriad end use options which are not entirely mutually exclusive. The resource is sustainable, but the number of processing facilities it can sustain is finite. Whether or not the forest resources can be all things to all men is doubtful. All end uses generate employment and economic activity.

The question for the State is: "Which end uses are really important in a national context to merit promotion and support?" Displacing imported fossil fuels and lowering GHG emissions would seem like a pretty good place to start.

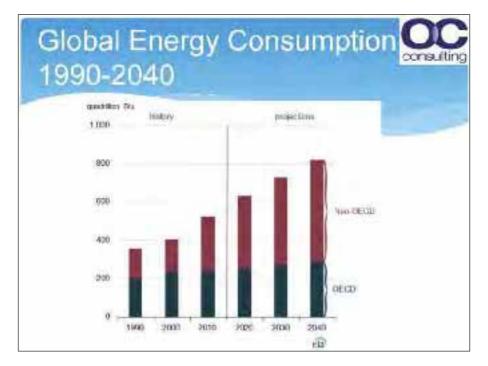


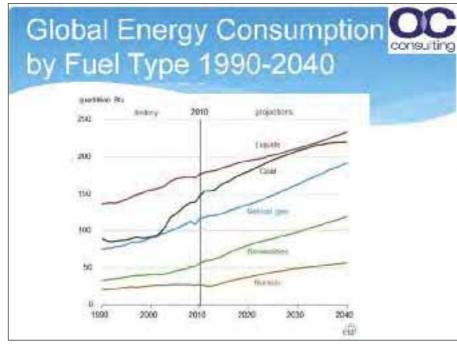
Market opportunities for wood in renewable energy

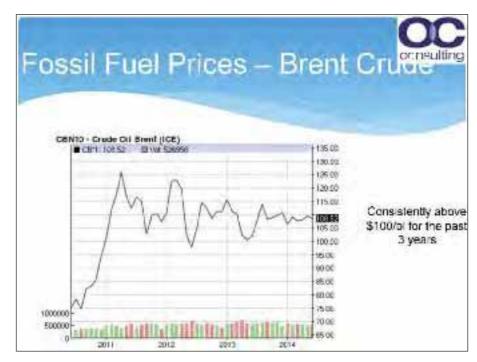
Ioe O'Carroll

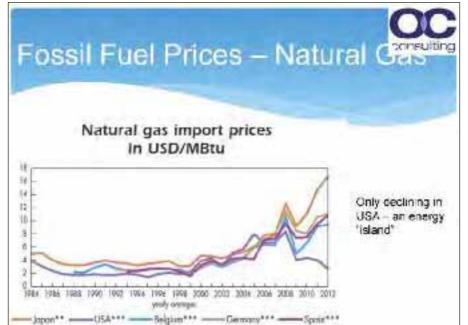






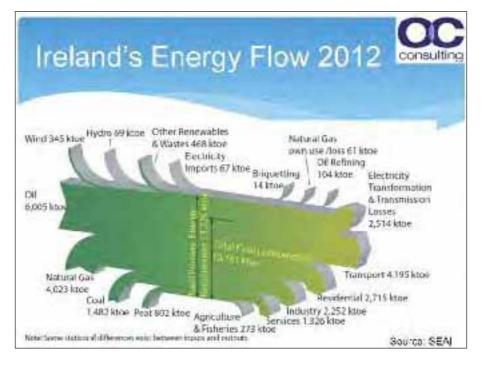


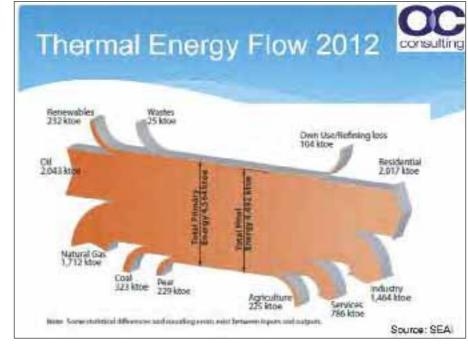


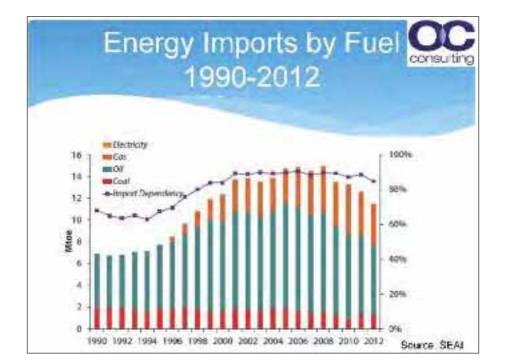


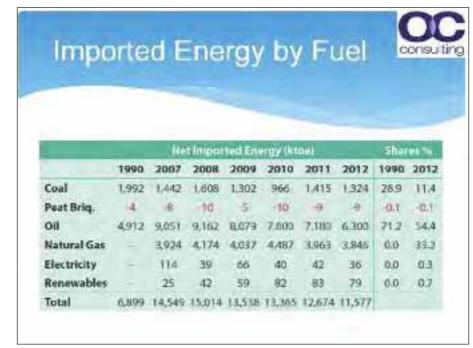
Market opportunities for wood in renewable energy

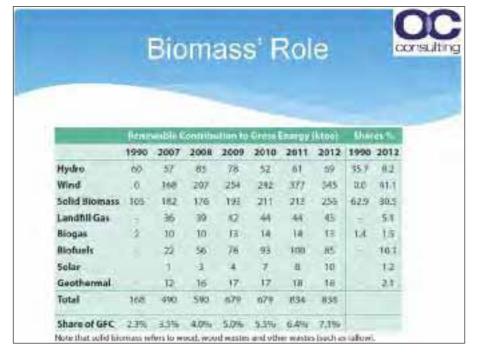
Joe O'Carroll













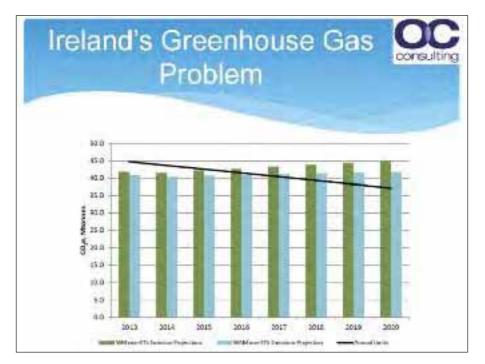
Market opportunities for wood in renewable energy

Joe O'Carroll





- \* Energy Imports up by 68% since 1990
- \* Imported Energy cost rising
- National Greenhouse Gas Emissions will exceed limits





# Fuel Cost for Heat Generation Fuel Cost for Heat Generation Strater Entricky rangery 2,000 20,000 MWN Nature Gas category 2,778-27 77 MWN AI VAT receive Fuel Type Fuel Type

Market opportunities for wood in renewable energy

Ioe O'Carroll

## Technology Proven

- Three years ago, biomass technology was seen as a major concern.
- Multiple reference sites across the country have removed this concern
- Biomass now used to heat Dail Eireann, Seanad Eireann, many Government Departments, universities, schools, leisure centres, hospital and country estates

# Market Opportunity



- \* Best used to displace LPG and Oil (8-12c/kWh)
- \* Off Natura Gas grid
- \* NW: Donegal-Sligo-Leitrim-Roscommon-Mayo
- SW: West Cark-Kerry-West Limerick
- Conservative market potential for 1m tonnes of woodchip in these areas (exclipower generation)
- Significantly higher price paying potential that panelboard sector, in these areas

## **Market Opportunity**



consulting

- Best use for biomass is still where there is a continuous demand for thermal energy – hot water, steam or thermal oil
- \* Target sectors:
- Wood processing
- Food & Drink manufacturing
- " Hospitality sector
- Healthcare
- District Heating Roscommon Town, Tralee, Killamey, Sigo, Letterkenny, etc.

Seizing the Opportunity

### Positive Momentum

- consulting
- \* Continuing number of high profile projects:
  - Monagnan Education Campus
- \* Connaught Gold
- Astellas
- \* GSK
- Development of Local Energy Supply Contracts by SEAI/DCENR
- Launch of Energy Efficiency Fund managed by SDCL

#### Additional Needs



- Clarity
  - \* Will an RHI be introduced or Not
- \* Will there be a Bioenergy Strategy or Not
- \* Dynamism
  - Bioenergy section of DCENR hopelessly under resourced – too much expected of too few

#### **Continuing Barriers**

#### Barriers



Market opportunities for wood in renewable energy

Joe O'Carroll

- Continuing, if misplaced, concern over the biomass supply chain
- Continuing preference for oil and gas boilers in State sector – eTenders
- Lack of clarity on air quality standards festering concern for each new large project.
- Lack of National Bioenergy Policy continuing delays in Bioenergy Strategy
- \* Rumours of RHI causing inertia

#### Barriers



- Confusion over NewERA role in Bioenergy sector
- Adding to already excessive State overhang in the energy sector
- REFIT Not FIT for purpose. Needs to be scrapped, start again
- Capital still difficult to access but improving
  - Need for asset finance options for small biomass.

Impact on Forestry Sector

#### Positive Impacts



- Employment is a given growing resource will create employment regardless of the end use
- Upward price pressure for sawmill and small diameter roundwood
- True market forces multiple suppliers/multiple buyers
- Myriad small business opportunities in:
- \* Harvesting
- Processing
- Transportation
- Biomass boiler sales and associated activity

#### **Policy Questions**



- Is maximising the contribution of biomass to the energy mix compatible with sustaining traditional uses for this material?
- Can the Industry be "all things to all men"?
- What forest derived products are strategically and factically more important for Ireland?
- Is the State willing to introduce the necessary policy changes to ensure that bioenergy plays a significant role in Ireland's energy supply?

## David Murray

# Opportunities for increasing international market share for Irish panel board products



David Murray is Innovation Manager with Coillte Panel Products, heading up the company's R&D drive. A UL graduate in Wood Science & Technology, David has 16 years' experience working in the timber industry in Ireland and the UK. His areas of expertise include Wood Panel Products, Off Site Construction and Engineered Wood Products. David is passionate about developing sustainable new value-added panel products that meet the needs of CPP's customers, specifiers and end users alike.

Coillte is playing a key role in the export led recovery and growth in the timber and forest products sector in Ireland. Since 2007, the company has focused increasingly on export markets for its timber panel products and, working with our sawmill customers, on developing export markets for Irish construction timber.

Coillte is an integrated forestry and forest products company, with businesses in land management and renewable energy, as well as the manufacture of market leading panel products, Medite MDF (Medium Density Fibreboard) and SmartPly OSB (Oriented Strand Board). Coillte Panel Products (CPP) is strongly dependent on export markets, selling more than 90% of what it manufactures outside of Ireland. Its focus is primarily on the UK and Europe, but in response to the Eurozone crisis, CPP has successfully developed new markets and now sells into 32 countries globally.

My presentation discusses how CPP adds real value to small diameter wood fibre – mainly sourced from first thinnings – and how panel products present the optimum use of valuable natural fibre resources.

CPP has a strong track record of developing new products and excels in collaboration with academia, key suppliers, industry experts and customers. Sustainability and Value for Money are the recurring customer requirements, and both are central to CPP's Innovation focus. This underpins Coillte's Strategy "Sustainable Value from Sustainable Living".

In the past two years alone, CPP has introduced several new innovative products in response to clearly identified market opportunities and these are gaining steady traction with our customers. These include SmartPly DryBacker which is designed to provide structural grounds for heavy fixtures and fittings on lightweight metal frame plaster-board partitions, with particular focus on hospitals and health care buildings due to its zero added formaldehyde resin technology. Medite Vent is a highly vapour permeable sheathing panel with high structural racking strength, for use in vapour diffusion open, low energy and passive buildings. SmartPly FR OSB sheathing and FR Build OSB flooring panels are flame retardant products developed in response to new fire safety guidance in the UK.

These brand new additions build on the success of other recent product launches by the company, most notably Medite Tricoya, lauded as the first major innovation in the wood composites industry in more than 30 years. Backed by a 50 year warranty, it is a modified wood panel with extreme durability and dimensional stability built in, that quite simply is in a league of its own.

With a strong pipeline of new ideas and current innovation projects, this is just the beginning. CPP is committed to meeting the requirements of its customers and end users, by solving industry 'problems' – or opportunities as I prefer to call them – created by various market drivers across Europe.

CPP's focus is to become the leading European supplier of innovative, market led MDF and OSB specialities, based on sustainable fibre and resin technology, thereby maximising the value from Irish small diameter fibre.



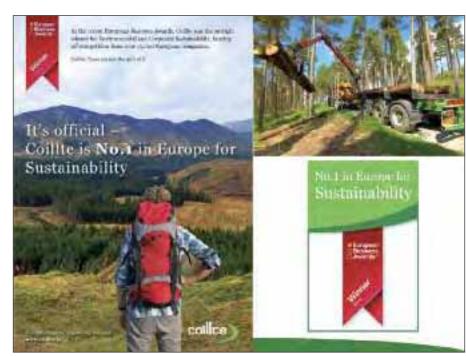






David Murray







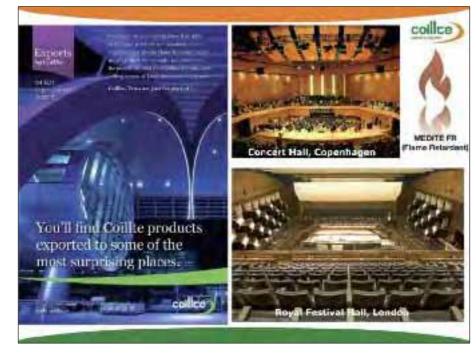






David Murray













David Murray

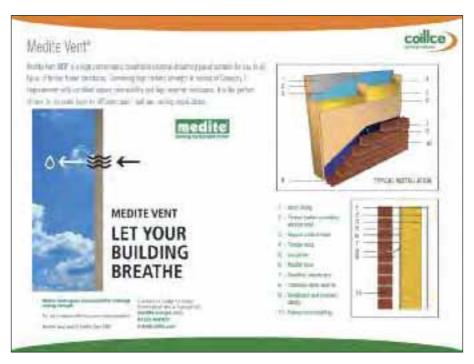












David Murray







#### Dr. Annette Harte

#### Exploring new products for Irish timber including engineered wood



Dr. Annette Harte is Senior Lecturer in Engineering at the College of Engineering and Informatics, NUI Galway. Her research includes the development of engineered wood products, numerical modelling, design and optimisation of timber structures and sustainable construction. She is leader of an EU COST network on the Reinforcement of Timber Structures, comprising international researchers.

The largest consumer of solid wood products globally is the construction industry. Wood is one of the oldest building materials known to man and many examples of ancient wooden structures exist today. In the last century, steel and concrete displaced wood as the material of choice, particularly in the non-domestic market. In recent times, however, there has been a re-evaluation by designers of the materials used.

This has been driven largely by issues of sustainability and enabled by the development of new engineered wood products that have excellent structural, thermal, economic and environmental properties.

Engineered wood products are manufactured by gluing together smaller pieces of wood to produce larger products with greater load-bearing capacity and less variability in properties than solid wood. These products include panel products, such as plywood and OSB, engineered I-joists, LVL, PSL, and glued laminated timber.

These products are well established in the market and are widely used. The most recent development in this field is the introduction of Cross Laminated Timber (CLT).

This is a massive wood panel product with high load bearing capacity that can rival steel and reinforced concrete, has a low weight and so reduces construction costs, has very predictable behaviour in fire and has the capacity to store significant quantities of carbon over the life of the building.

CLT has been used in a number building projects across the world. The Stadthaus in London is a nine-storey apartment building having a concrete ground floor and eight upper floors of CLT. When completed in 2008 it was the tallest timber building in the world. The success of this project has sparked considerable interest in this form of construction for multi-storey buildings. In Melbourne, a 10-storey apartment building has been completed. There have been preliminary designs prepared for other buildings of up to 30-storeys.

Recently, design codes for CLT have been approved in the US and Canada and the EU equivalent is nearing completion. This development should see an acceleration in the use of CLT in the construction sector.

The Timber Engineering Research Group at NUI, Galway is currently investigating the feasibility of producing CLT using Irish-grown Sitka spruce. This work is being carried out as part of the project 'Innovation in Irish Timber Usage' funded by the Department of Agriculture, Food and the Marine. Preliminary findings show excellent promise for the suitability of Irish timber for CLT production.

#### Exploring new products for Irish timber including engineered wood

Dr. Annette Harte, NUI Galway

National Forestry Conference 6th June 2014







#### Outline of presentation

- Timber in Building
- . Engineered Wood products
- Cross-laminated timber CLT
- CLT Buildings
- CLT using Irish Sitka spruce current research

#### Timber in buildings

- Timber is one of the oldest construction materials
- Competition from steel and concrete led to decline in use
- Resurgence in interest in timber for construction due to sustainability requirements and the emergence of new high-performance engineered wood products
- Research has led to greater understanding of behaviour leading to the development of new approaches to construction

# Historical timber structures Balling Bridge in Gansu Province, China Completed in 1398, rebuilt in 1919 and 1923. Total length 40.2m Five-storied pagoda at Horyu-ji Temple Built about 1,300 years ago Historical Ember roof Glastonbury

14th century medieval barn

#### Timber structures today



 Leonardo da Vinci bridge across E18. near Oslo



Credit Valley Hospital in Ontario.



- Stadhaus, Hackney, London 9-storey apartment building

#### Timber structures of the future

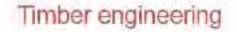


(Description, 2019)

Stockholm: Proposed 34-storey tower Proposed 30-stoney tower

Exploring new products for Irish timber including engineered wood

Dr. Annette Harte



- Traditional timber structures solid wood sections
   Section and length limited by size of tree.
- Requirement for large span, high structural capacity members
- Advances in timber engineering has led to the development of Engineered Wood Products (EWPs)
  - use of timber in more demanding applications
  - small size timber bonded rogether with adhesive to form composite

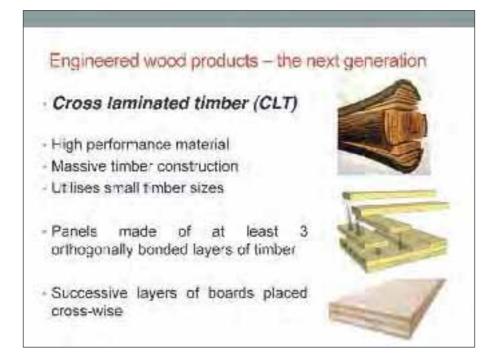


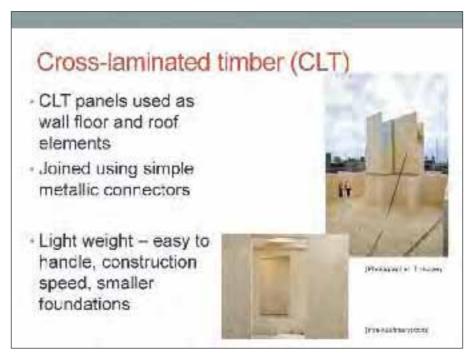




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Dr. Annette Harte







# **CLT Properties**

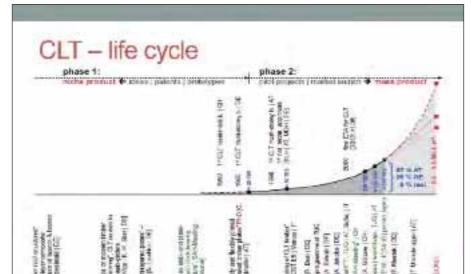
- High strength and stiffness in two directions
- . Lowers the energy used in construction
- Reduces operational heat loss by improving insulation
- and airtightness
- Very easy to demolish and recycle at end of life.

#### **CLT Fire Performance**

- Thick cross sections, when exposed to fire, char at a slow and predictable rate
- CLT construction has fewer concealed spaces within wall and floor that reduces risk of fire spread
- Adhesive type used in CLT panels has significant impact on charring rate
- 3-storey SOFIE building 2007 1 fir fire test maintained structural integrity



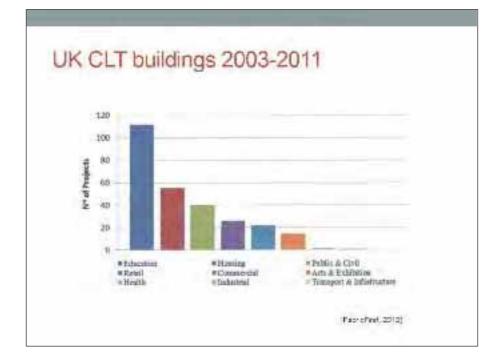
Frant 2008



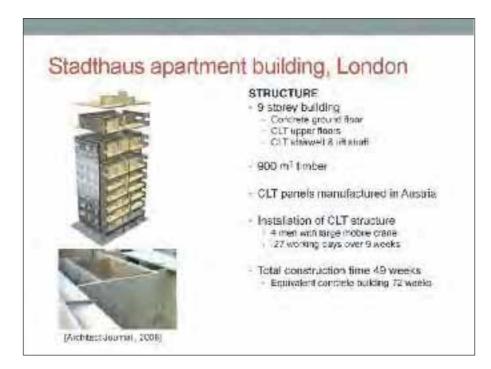
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(Scholholer, 2010)











# Forte building construction











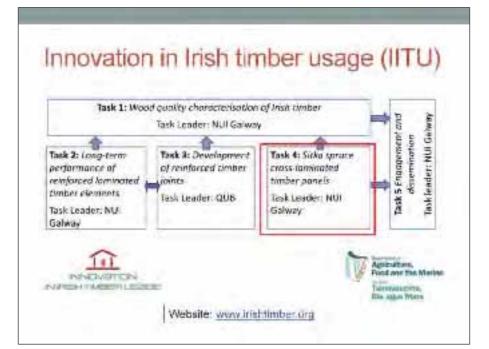
Construction of CLT structure 6 men in 38 days

Concrete structure 30 men and 15-18 weeks

### William Perkin High School London

- UK's largest timber building Opened Spring 2014
- £19m four-storey complex
- 3,800m² CLT (KLH Austria)
- Above-ground floors 230mm-thick and span 7.5m with a 2.5m cantilevering walkway.
- Structure assembled in 19 weeks

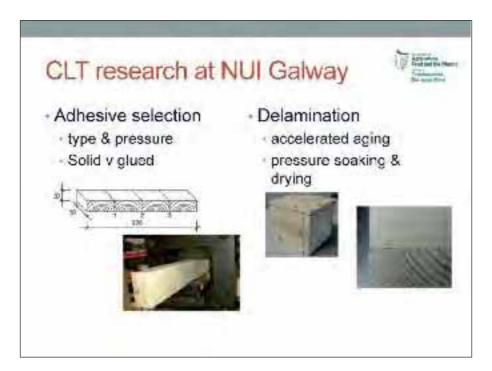


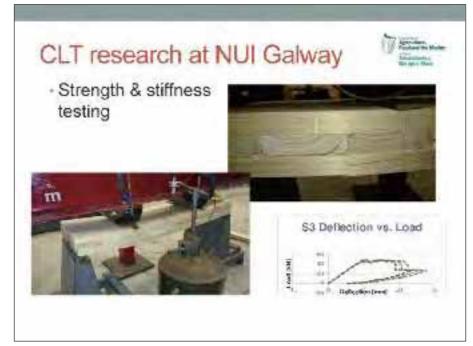


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Dr. Annette Harte

Exploring new products for Irish timber including engineered wood





#### CLT research at NUI Galway

#### Next steps

- Investigate rolling shear properties of Sitka spruce
- Manufacture and test large scale panels
- Investigate the technical requirements for upscaling to commercial manufacture in Ireland

Exploring new products for Irish timber including engineered wood

Dr. Annette Harte

#### Thank you

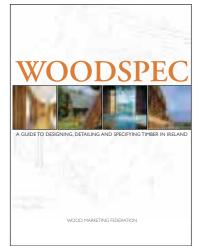


#### CLT constructions - videos

- Construction of a single family house with CLT http://www.youtube.com/walch?v=SC7ND\_dMnT4
- Bridport House timelapse of the construction http://www.youtube.com/walch?v=jDrfVYdhpGQ
- Forte Build time lapse video
   http://www.youtube.com/watch?v=cqXygHyU5ws

#### WOOD MARKETING FEDERATION





WMF published a 376-page hardback book Woodspec - A Guide to Designing, Detailing and Specifying Timber in Ireland in 2007.

The Wood Marketing Federation (WMF) was founded in 1989 to promote wood in all aspects including wood products, standards, design and usage. It recognised the need to promote wood especially to builders, architects, engineers, designers, specifiers, State agencies and educational bodies as there was a dearth of good information on wood usage and design in Ireland up until WMF was formed.

#### Mission and objectives

Our mission and objectives reflect these changes and also acknowledge the role wood will play in sustainable living and climate change. The WMF mission is:

To promote wood as a renewable, sustainable and versatile natural material

WMF members and other stakeholders support a range of projects, which meet with the Federation's objectives:

- Quality: to support the development of the highest standards.
- Education: to increase the knowledge and understanding of wood and wood
- Innovation: to promote and encourage new uses and applications for wood.
- Representation: to support member organisations in improving and developing their markets.

#### **Projects**

Most projects have a strong educational content because we recognise that there is a lack of information relating to wood usage and design specific to Ireland. Our programme is aimed at a number of audiences including wood users, designers and specifiers along with our future audience such as students currently studying engineering, architecture and design in third level colleges. Projects to date include:

- Wood Awards Ireland competition launched in association with RIAI for building and design projects using wood as the inherent medium.
- Publication of a 376-page hardback book *Woodspec A Guide to Designing, Detailing* and Specifying Timber in Ireland.
- 3rd level student wood awards which now has entrants from Irish universities and third level colleges – North and South.
- Wood promotional and educational literature including posters, website, Talking *Timber* series, *Pride in the Product* and newsletters.
- Wood promotion campaign to 3rd level colleges.
- Studies and seminars on wood usage, design in construction, fencing, leisure use, renewable energy, sustainable forestry and wood certification, aimed at architects, engineers, designers, wood specifiers, planners and other specialist groups.
- Shows and events including Plan Expo-Ecobuild in the RDS showcasing wood use and design and Timber Expo in England.
- Collaboration with other organisation such as the Tree Council of Ireland to promote wood to Primary and Secondary Schools
- Events such as Garden of Plenty Sustainable Living Silver Gilt Medal winner at Bloom (2013) and Meitheal-Wood Collaborative at Electric Picnic (2009-2013).
- Lobbying Government, State agencies, EU and other organisations.

E info@wood.ie W www.wood.ie

#### THE SOCIETY OF IRISH FORESTERS





Title page of facsimile edition of The Trees of Great Britain and Ireland published by the Society in 2012.

The Society of Irish Foresters is an all island body which represents the forestry profession in Ireland. It was founded in September 1942 'to advance and spread the knowledge of forestry in all its aspects'.

#### **Objectives**

The Society fulfils this objective by organising field days, study tours, workshops, public lectures, conferences and publications. It has more than 670 members who are predominantly professional foresters but includes, through its Associate and Student membership, a wide cross-section of people who are involved in, or share an interest in, Ireland's forest industry. Our objectives are:

- To promote a greater knowledge and understanding of forestry in all its aspects, and to advance the economic, social and public benefit values arising from forests;
- To support professionalism in forestry practice;
- To establish, secure and monitor standards in forestry education and professional
- To provide an appropriate range of services to members.

The Society is currently contributing to a number of government policy documents including the ongoing Forest Policy Review, the Forestry Bill 2013 and the Consultation Paper on the Forestry Programme 2014-2020.

Since 1943, the Society of Irish Foresters has published Irish Forestry, a peer-reviewed journal of current research work; a bi-annual newsletter The Irish Forester; and a range of Policy Position Papers. In 2012, to celebrate its 70th anniversary, the Society published a limited edition reprint of Elwes and Henry's masterpiece The Trees of Great Britain and Ireland. Our most recent publication is Glimpses of Irish Forestry, a concise yet comprehensive overview of Ireland's forests and forest products industry.

The Society of Irish Foresters is deeply committed to promoting and maintaining professional standards in Irish forestry and the regulation of the forestry profession in Ireland. More than a decade ago, we introduced a Programme of Continuous Professional Development for members as a means of confirming that professional foresters are up to date in current forestry practice. Members of the Society are also bound by the Society's Code of Ethics and Professional Conduct. The Society of Irish Foresters also assesses forestry education courses in Ireland to ensure the highest professional standards.

These are exciting times to be involved in Irish forestry. Times of change bring us challenges and opportunities. When the Society of Irish Foresters was founded in 1942 the major challenge was to establish and develop a forest industry in Ireland.

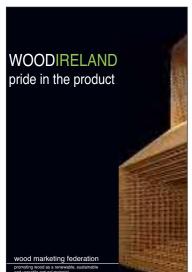
Our challenge today is to protect and consolidate the valuable resource that has been created and to develop markets for the wood from these forests. Today's conference is a step in that direction.

Society of Irish Foresters Glenealy Co. Wicklow

Glimpses of Irish Forestry published by the Society in 2014.

Glimpses of Irish Forestr

W www.societyofirishforesters.ie E sif@eircom.net



tional and educational literature including posters, website, Talking Timber series and Pride in the Product (above).

WMF publishes a range of wood prom





























www.agriculture.gov.ie