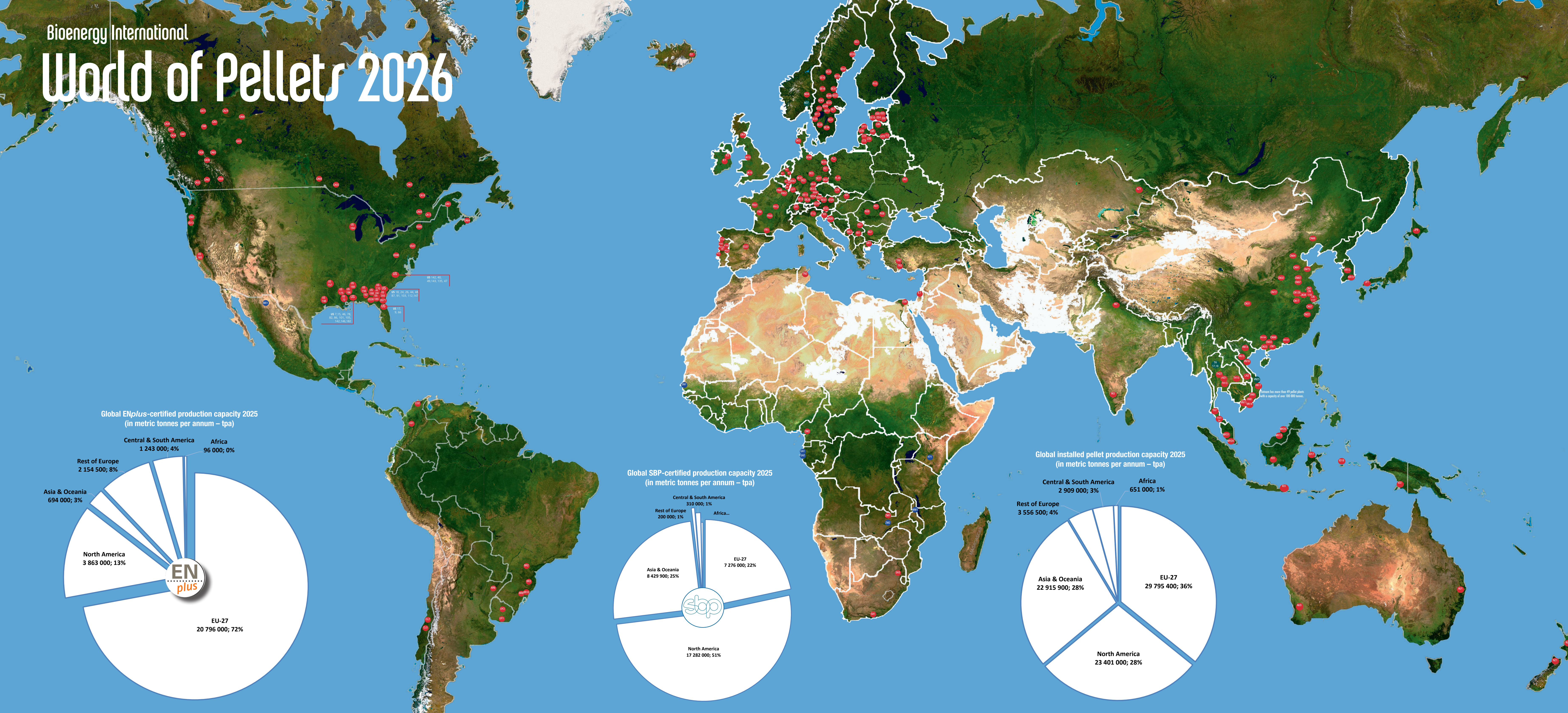




World of Pellets 2026



ABOUT WORLD OF PELLETS 2026

The data is for 2025, collected and collated in collaboration with Bioenergy Europe, Sustainable Biomass Programme (SBP), and World Bioenergy Association (WBA), during April-June 2026. "P" denotes planned, and "C" denotes under construction. "T" denotes advanced pellets with coal-like properties (aka torrefied, steam treated or hydrothermal carbonisation) primarily used for energy purposes. Plants with an installed capacity of 10 000 metric tonnes per annum (tpa) or more, and that were in operation at some point during 2025/2026 are listed.

Plants with an annual installed capacity of 100 000 tonnes or more are also "marked" on the map itself, space permitting. One or two have been marked as "closed", the plant was idled or closed during 2025/2026 with little or no production but not permanently closed. The listing is by country and in alphabetical order, except Belarus (BY) and Russia (RU) which have been excluded from the map and overall statistics.

Note that the term "installed capacity" does not necessarily reflect actual production of any given plant. Instead, it is the given nameplate capacity, permitting capacity, or approximate capacity. The latter is based on the pellet press (es) nominal tonnes-per-hour (tpa) capacity rating x 7 500 hours. Note also that some plants may co-produce other densified products such as animal bedding, sorbent pellets, briquettes, or wood powder at the same location.

ALBANIA (AL)	CAPACITY
ENplus-certified plants (1), 47% of total capacity	16 000
SBP-certified plants (2)	-
Total number of plants (3)	34 000

ARGENTINA (AR)	CAPACITY
ENplus-certified plants (2), 40% of total capacity	150 000
SBP-certified plants (7)	-
Total number of plants (3)	329 000

AUSTRALIA (AU)	CAPACITY
ENplus-certified plants (2), 0% of total capacity	0
SBP-certified plants (2)	-
Total number of plants (3)	377 800

BELGIUM (BE)	CAPACITY
ENplus-certified plants (4), 94% of total capacity	2 590 000
SBP-certified plants (8)	-
Total number of plants (12)	2 753 800

BELARUS (BY)	CAPACITY
ENplus-certified plants (1), 100% of total capacity	10 000
SBP-certified plants (1)	-
Total number of plants (2)	10 000

Plants marked in green denote an **ENplus-certified** facility, in blue, an **SBP-certified** facility, and blue-green denotes a facility holding both **ENplus** and **SBP** certifications. **ENplus** is a quality standard and assurance scheme covering the technical performance of pellets in (European) residential and commercial heating installations (stoves and boilers). **SBP** is an assurance scheme to ensure that woody biomass is sourced both legally and sustainably.

While the map lists **538 ENplus-certified** facilities in 45 countries, and **179 SBP-certified** facilities in 21 countries above the 10 000 tpa threshold, this does not necessarily reflect actual **ENplus-certified** or **SBP-certified** output, neither does the list include all **ENplus-certified** plants – many are below the 10 000 tpa capacity threshold. For instance, Italy has numerous **ENplus-certified** pellet plants, but many are under the 10 000 tpa threshold. There are other technical standards; for instance, the Pellet Fuels Institute (PFI) pellet standard for US domestic heating appliances, and other international industry standards which cover utility-grade pellets typically used by power plants.

More importantly, the certification status can change for any given company, facility, and/or country/jurisdiction. As of April, 2022, **ENplus** certification was suspended for all producers, traders, and service providers based in Belarus and Russia due

to the invasion of Ukraine. In July 2022, following FSC's withdrawal from both countries, **SBP** terminated all **SBP** certifications. This means that neither these countries sell **ENplus**- or **SBP-certified** pellets as long as the suspension remains, nor new applications for certification from these two countries will be accepted. For current certification status, always check with www.enplus-pellets.eu and www.sbp-cert.org/certificate-holders/.

EU-27
With 29.8 million tpa installed capacity in 2025, the European Union (EU-27) grew by around 1.8 million tpa, representing a 36 percent share of global installed capacity, down 2 percent on 2024. With over 5.7 million tpa capacity, Germany is the world's fourth-largest producer, and maintains its lead in the EU-27. Sweden and Austria tie at second, both at just over 2.7 million tpa, followed by France (2.4 million tpa), and Latvia (2.1 million tpa). Cyprus and Malta remain the only two EU Member States without pellet production capacity, at least not above 10 000 tpa.

As can be expected, the EU-27 has both the largest volume and share of **ENplus-certified** production capacity – 20.8 million tonnes on 2024. In global terms, the EU-27 accounted for 72 percent of global **ENplus-certified** capacity. Over a fifth, 22 percent, of EU-27 installed capacity, or close to 7.3 million tpa was **SBP-certified**, placing the EU-27 in third position.

REST OF EUROPE (excl. BELARUS & RUSSIA)
Excluding Belarus and Russia, the region had the fourth-largest installed capacity share in 2025, just over 3.5 million tpa or

4 percent of the global share. In **ENplus** terms, the third-largest with 9 percent of certified capacity or 2.5 million tonnes, a decrease of 0.4 million tonnes. **SBP-certified** capacity was a modest 200 000 tpa or 1 percent of global **SBP-certified** capacity. Note that if production (2022) from Belarus and Russia were included, another 4.4 million tpa of installed capacity would be added to the region. Much of the installed capacity in both Belarus and Russia had been **ENplus-certified** with production destined for European premium pellet markets, and several plants had **SBP certification**.

However, following Russia's invasion of Ukraine in February 2022, trade embargoes, economic sanctions, and the suspension of ENplus and SBP certifications in both countries have locked these volumes out of the EU pellet markets. While some of these volumes have found their way into countries/jurisdictions that have not imposed trade sanctions, the current unverified understanding is that many of these pellet plants have been idled or closed given that the domestic markets for pellets in Belarus and Russia are, at best, very limited.

NORTH AMERICA
With a 1.4 million tpa increase to 23.4 million tpa in 2025, North America is the second-largest region in terms of installed pellet production capacity, accounting for 28 percent of global capacity. At 15 percent, the region continues to have the second-largest share of global **ENplus-certified** capacity, just shy of 3.9 million tpa, a decrease of 0.4 million tpa on 2024. When it comes to **SBP-certified** capacity, North America dominates with a 51 percent share of global **SBP-certified** capacity or almost 17.3 million tpa. This is to be expected given the volumes and number of plants supplying the European and Asian energy utility markets with regulatory requirements for sustainability certification.

As a country, the United States (US) continues to dominate as having the largest volume of known installed production capacity over 10 000 tpa – almost 18.9 million tpa in 2025. It is also home to the world's largest pellet plants with several in the 750 000 tpa and beyond range. It is also home to the world's largest pellet producers, while the largest volume of known planned/proposed new capacity is also in the US. With over 4.5 million tpa, Canada is the world's fifth largest producer. Despite both closures and curtailments, British Columbia (BC) is the largest pellet-producing province; Alberta (AB), Québec (QC) and New Brunswick (NB) are emerging.

ASIA PACIFIC & OCEANIA
The region had the third-largest installed capacity share in 2025, 22.9 million tpa or 28 percent, a significant increase from 2024. Passing 9 million tpa capacity, Vietnam emerges as the world's second-largest producer, closely followed by China, the world's third-largest producer at 7.6 million tpa. China is also currently home to the region's largest pellet plant at 600 000 tpa. It is also **ENplus-certified**, accounting for the lion's share of **ENplus** volumes from the region. By contrast, **SBP-certified** volumes top 8.4 million tpa, or a 25 percent share of global **SBP-certified** capacity, second to North America.

A caveat for China is that there is a high degree of uncertainty even within the country – industry experts suggest that there may be as many as 2 000 plants and 20 million tpa. Little of China's pellet production is exported; production is driven by domestic national and regional policies to replace coal in residential and local heating with densified biomass fuels made from local forest industry and agricultural residues. In addition, current policy remains restrictive on wood pellet imports.

Thailand, Malaysia, and Indonesia have all surpassed the 1 million tpa milestone (1.7, 1.3, and 1.1 million, respectively). There are, however, additional plants and projects in various stages of development, perhaps already operating, in the region, meaning there is more production and capacity in some of these countries than accounted for on this map. Public details remain sketchy, and several are under NDAs (which this publication respects). In India, the biomass co-firing mandate seems to be generating investment interest, as evidenced by new pellet plants. However, the development of micro-scale biomass pellet production for cooking on a village-scale self-production for self-consumption model could prove to be a successful and replicable model across tens of thousands of villages, not just in India.

CENTRAL & SOUTH AMERICA
The five countries had a combined installed capacity of just over 2.9 million tpa in 2025, up 300 000 tpa from 2024, representing about 3 percent of global capacity. Brazil is the largest producer in the region with over 1.8 million tpa, and is developing capacity primarily for export, including pellets made from sugarcane bagasse. Countries like Argentina, Chile, Colombia, and Uruguay are primarily developing small to medium-sized domestic pellet production for local residential heating markets. Over 1.2 million tpa of the region's installed capacity was **ENplus-certified**, or four percent of global **ENplus** capacity, whereas 310 000 tonnes or 1 percent was **SBP-certified**.

AFRICA & REST OF THE WORLD
In terms of potential growth, the region is showing signs of positive development with over 0.6 million tpa of production, some of which is **ENplus-certified** and **SBP-certified**. South Africa leads with over 200 000 tpa, followed by Egypt with over 100 000 tpa installed capacity. With several projects in the 10 000 – 100 000 tpa size range in sub-Saharan Africa (SSA), installed capacity could reach the 1 million tpa milestone by 2030.

It should also be pointed out that, like India, several countries have small-scale production (less than 10 000 tpa) using a multitude of biomass feedstock serving local markets, in particular, cooking. It is also this sector that local small-scale production of densified biomass fuels has enormous potential to address several social and environmental issues such as deforestation, illegal logging, indoor air pollution, invasive species, and bush encroachment.

In 2026, there were 1388 operational biomass pellet plants in 73 countries (excl. Belarus & Russia) that combined had a total installed capacity of 83 228 600* metric tonnes per annum (tpa).

* incl. 730 000 tpa that consisted of "black pellet" (T) capacity (13 plants).
* incl. 28 686 500 tpa that was **ENplus-certified** capacity in 536 plants located in 45 countries.
A total of 179 plants in 21 countries incl. a few under construction, were **SBP-certified**.

ENplus is a leading international technical pellet quality standards and assurance scheme primarily for the residential heating sector. The **Sustainable Biomass Program (SBP)** is a leading international certification scheme that champions the responsible sourcing of biomass, providing robust assurance that biomass, whether used for energy, industry, or new bio-based products, is sourced both legally and sustainably.

