

Austrian Pelletmarket February 2026 Göteborg, Sweden

Doris Stiksl proPellets Austria

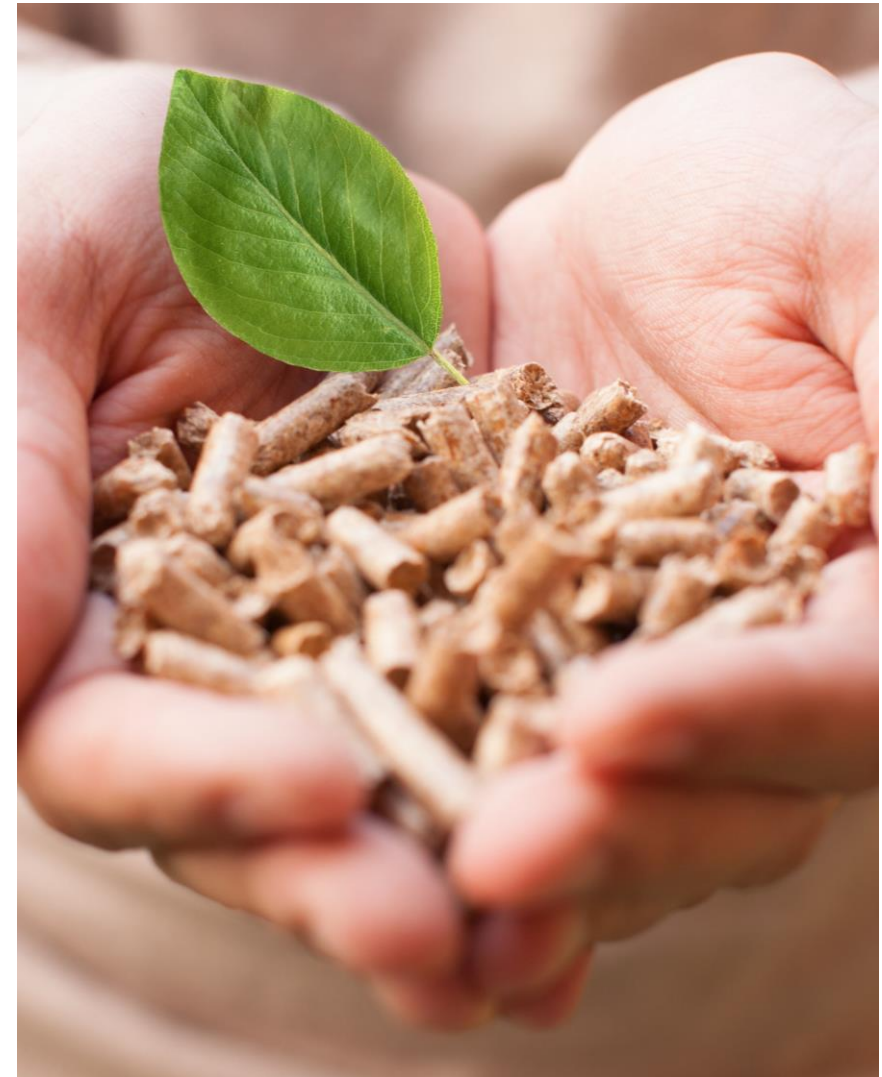


Mature Pelletmarket Austria?!

Facts, figures and perspectives
..of the Austrian Market

Definition of an mature market

- » Supported by good **frame conditions**
- » Many suppliers and **real competition**
- » Stable quality and clear **standards**
- » **Enough production** and **secure supply**
- » **Transparent prices**
- » “**mainstream Customers**” (not early adopters)
- » Service, installers, logistics, and trust
- » Rules and policy are part of the market
 - » Subsidies and rules support the market
 - » The market stays stable even if programs end

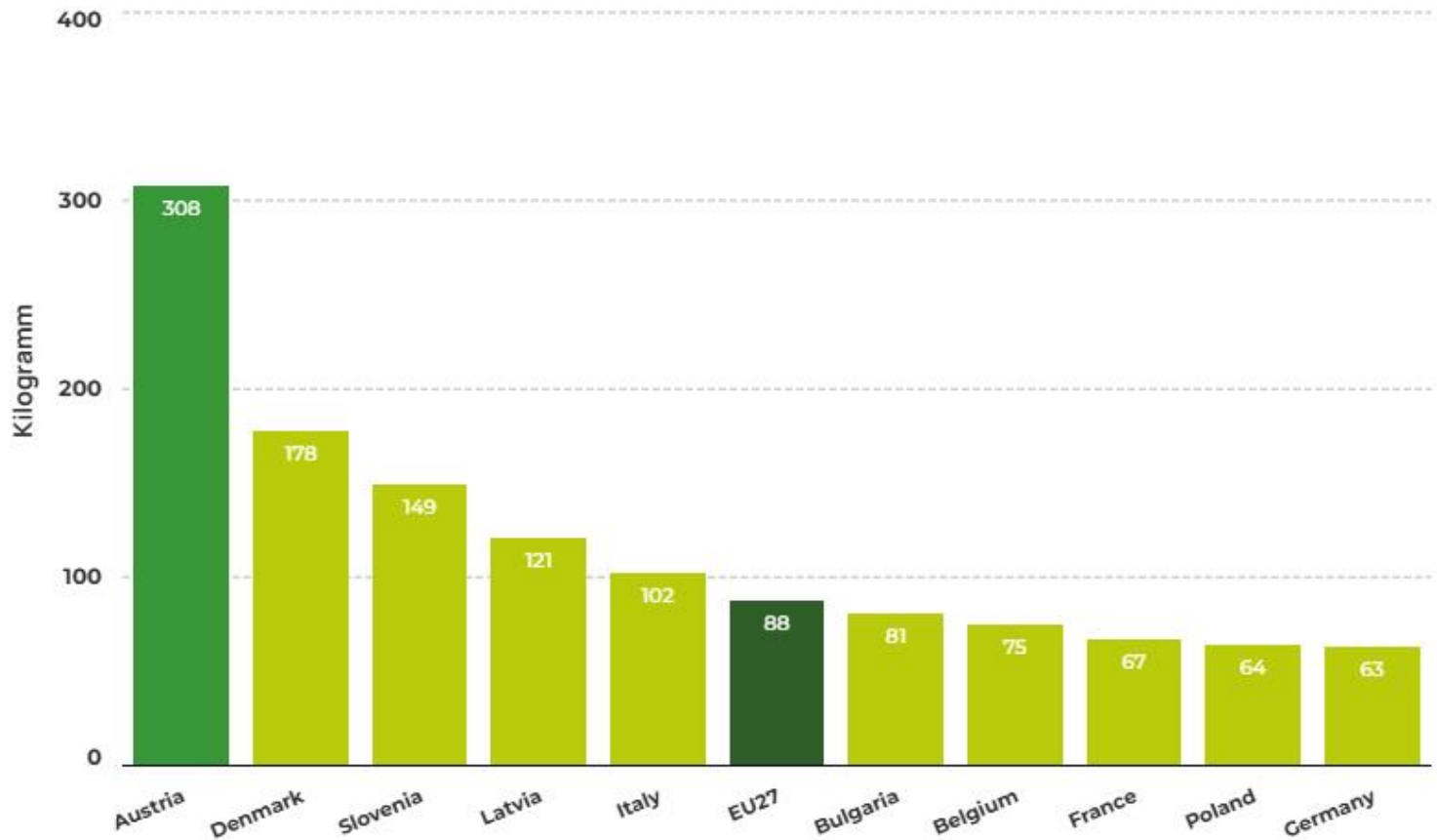


Mainstream Use – Austria is a

- » Austria has **the highest pellet consumption per household** in Europe
- » **More than 5% of households** use pellet boilers
- » Biomass covers 43% for heating at home demand in Austria
- » ~18 million GJ of bioenergy from pellets in Austria

Pellet consumption of the european residential sector

per household in kilogramm | 2024



Source: Bioenergy Europe, Statistical Report 2025 | Chart: proPellets Austria



Mature market?

Yes.

The pellet market in Austria is **largely mature** today.

However, there is room for improvement!



Austria's good framework conditions

Austria is a forest-rich country

- More than 47 % of forests
- Good raw material supply
- Strong sawmill industry
- Generally **positive image of wood utilization and forest management**



Austria's good framework conditions

Woodland Austria

- » Major investments and efforts to anchor **knowledge** regarding forestry/wood/timber construction in education
- » New professorships in timber architecture to strengthen expertise in timber construction
- » ...and Pellets are part of the circular economy



Austria's favourable framework conditions

Europe's „Boiler Silicon Valley“

- » **Pelletstandards**
supported the
development of boiler
production
- » High expertise and know-
how
- » 80% export share
- » **Today: global excellence**



Austria`s good framework conditions:



- Pellet Producer
- Trader
- Boiler & Stove manufacturer
- Certification bodies
- Plant engineering

20 Years : Uniting **many Views** into **one Voice**

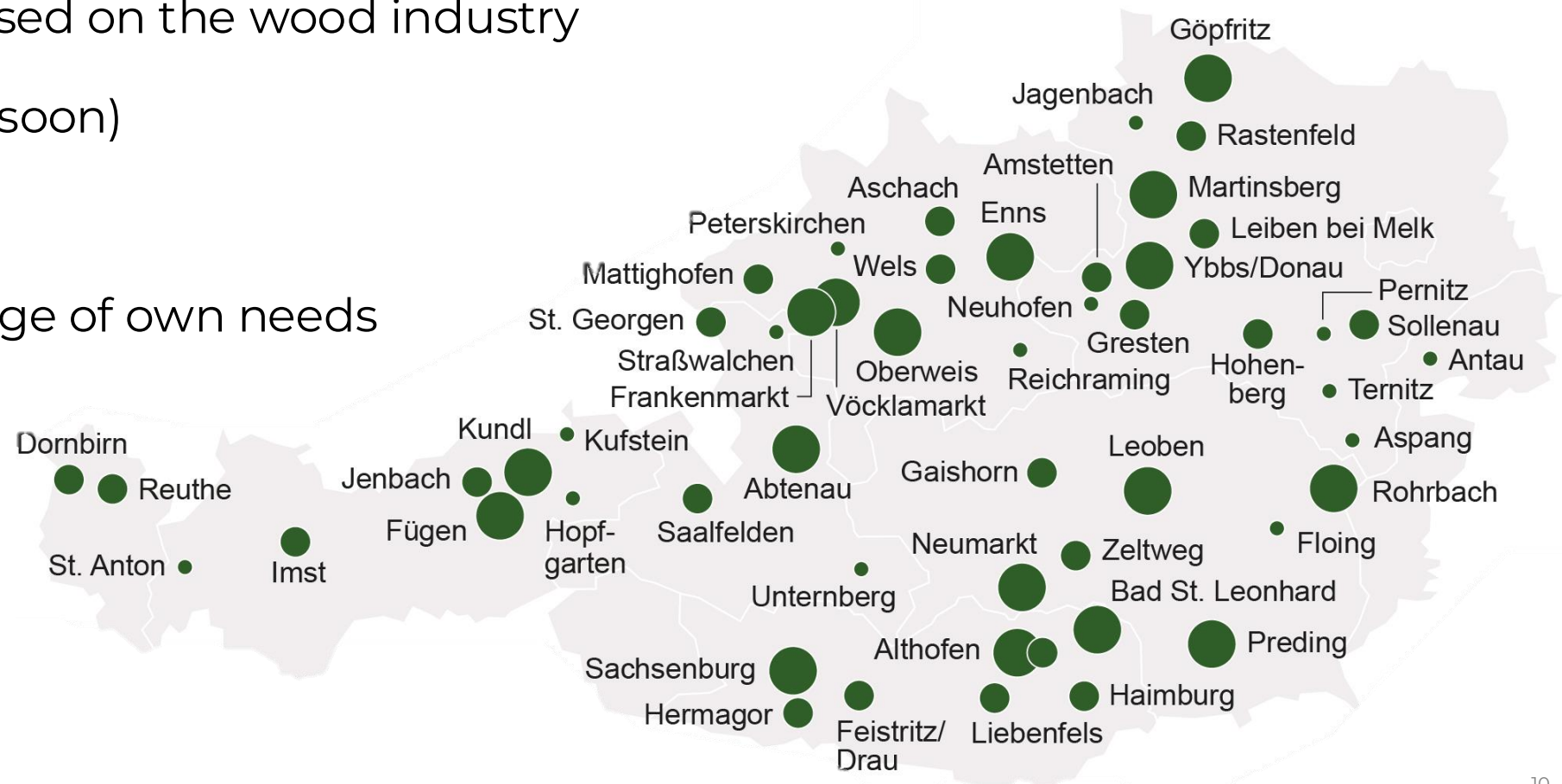
Work for sound framework conditions

Subsidies, building regulations, emission limits,...

Austria's good framework conditions

Many providers, strong competition

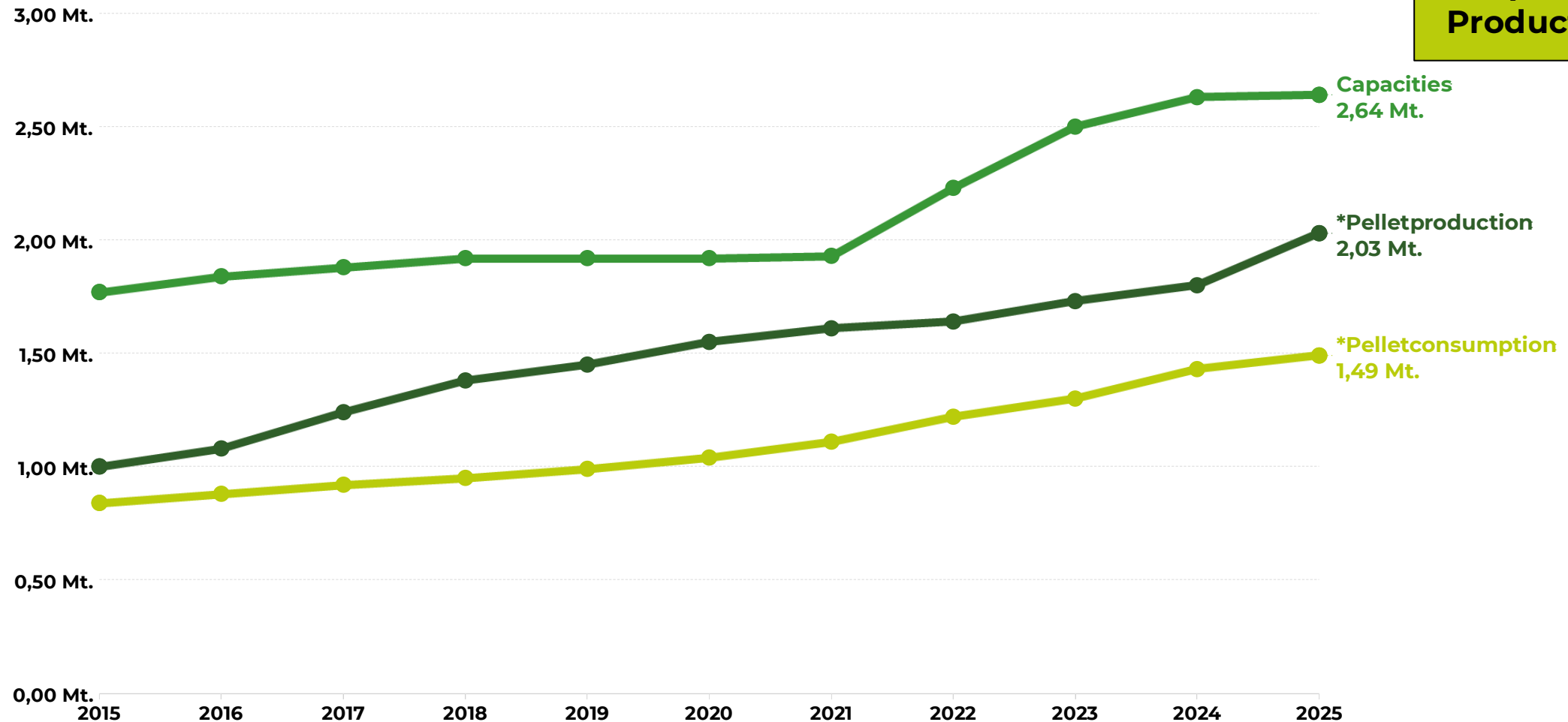
- » Stable supply based on the wood industry
- » 55 locations (+ 1 soon)
- » Local availability
- » Sufficient coverage of own needs



Increasing production and demand

Consumption | Production | Capacities

in Million Tons per Year | January 2026



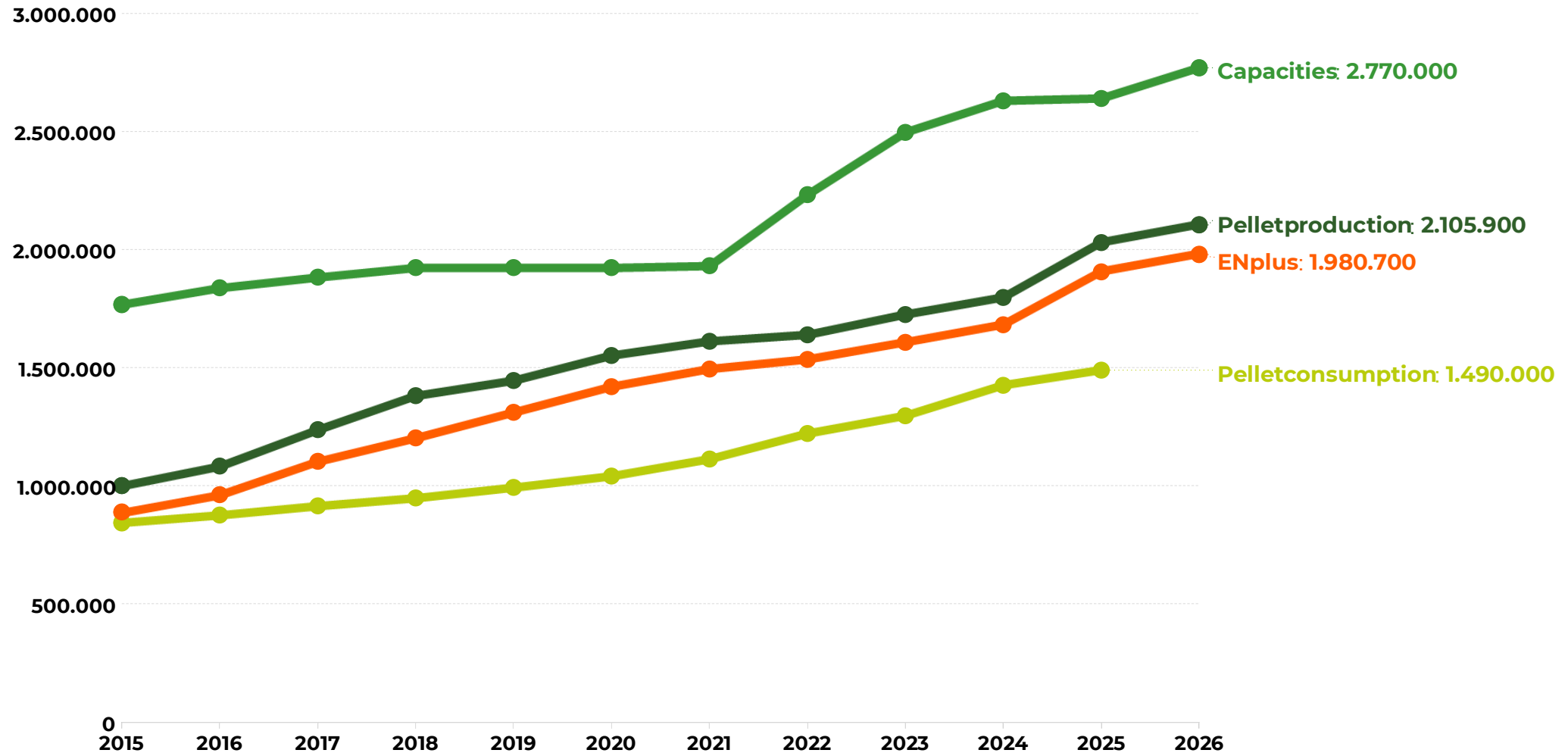
Expectations 2026:
Capacities +4,9%
Production + 3,7%

Source: proPellets Austria | Last Update: January 2026.
Production and Capacity Values relate to Sectorinformation
*The latest values are our current prognosis

Sufficient production and secure supply

Consumption | Production | Capacities

in Tons per Year | January 2026

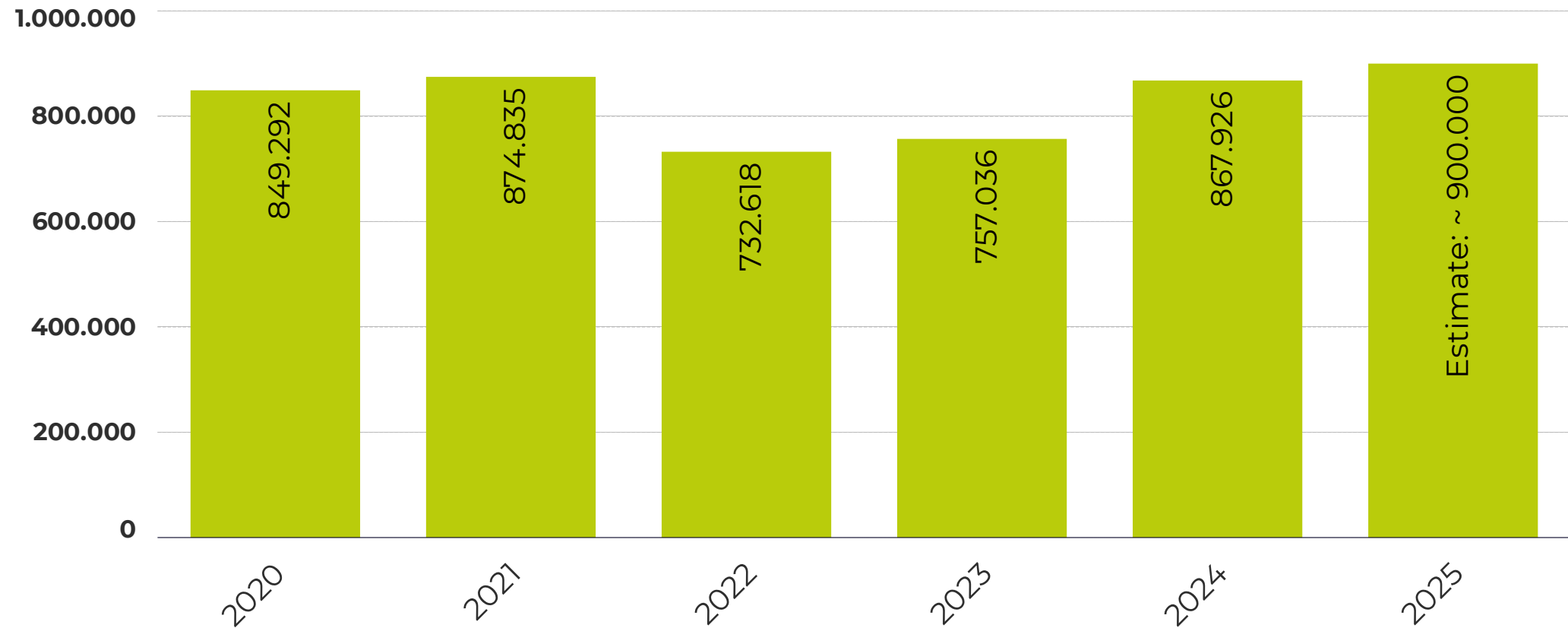


Source: proPellets Austria | Last Update: January 2026.
Production and Capacity Values relate to Sectorinformation
Capacity and production based on manufacturer reporting; consumption calculated via market modeling.

Powering Europe: Exporting the Energy Transition

Annual Pellet Export Trends Austria

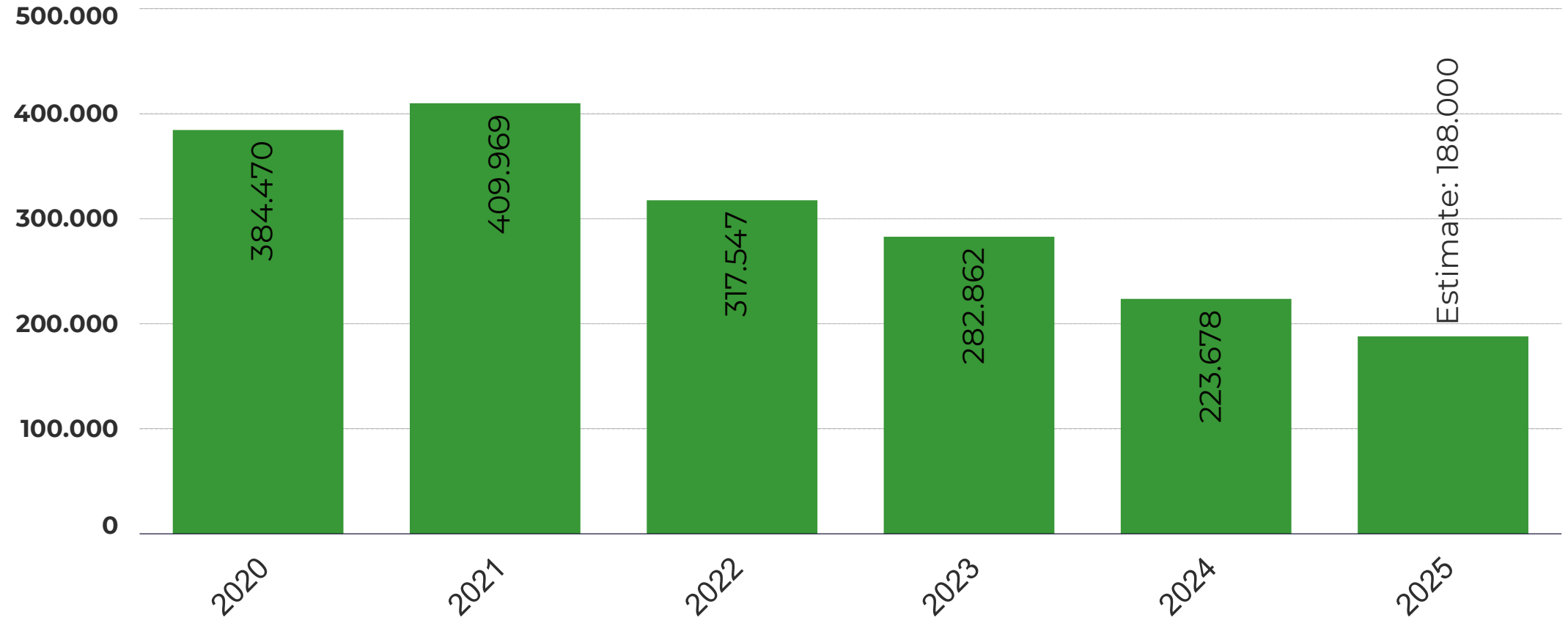
Year-over-Year Comparison in metric tons



Shifting Toward Self-Reliance

Annual Pellet Import Trends Austria

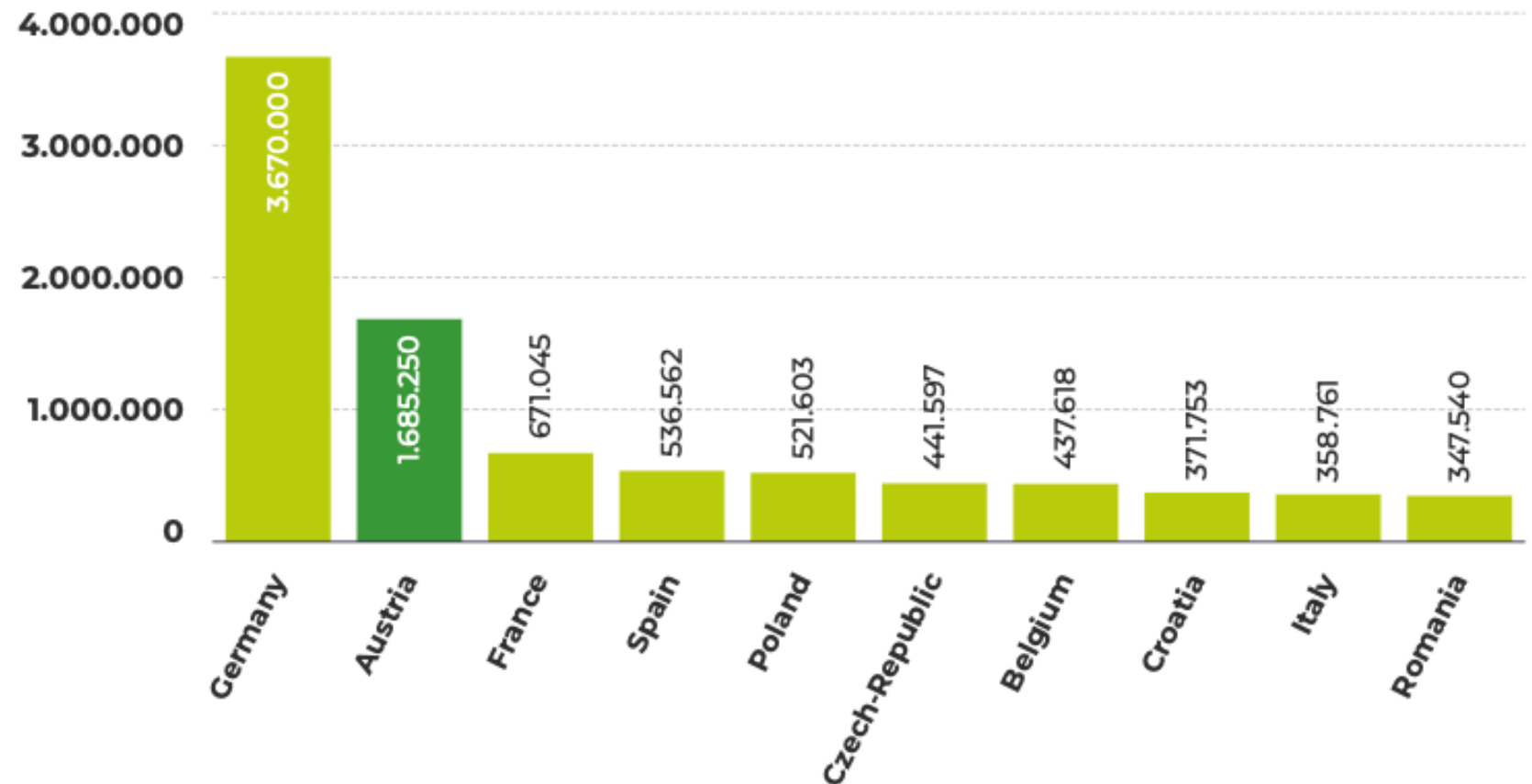
Year-over-Year Comparison in metric tons



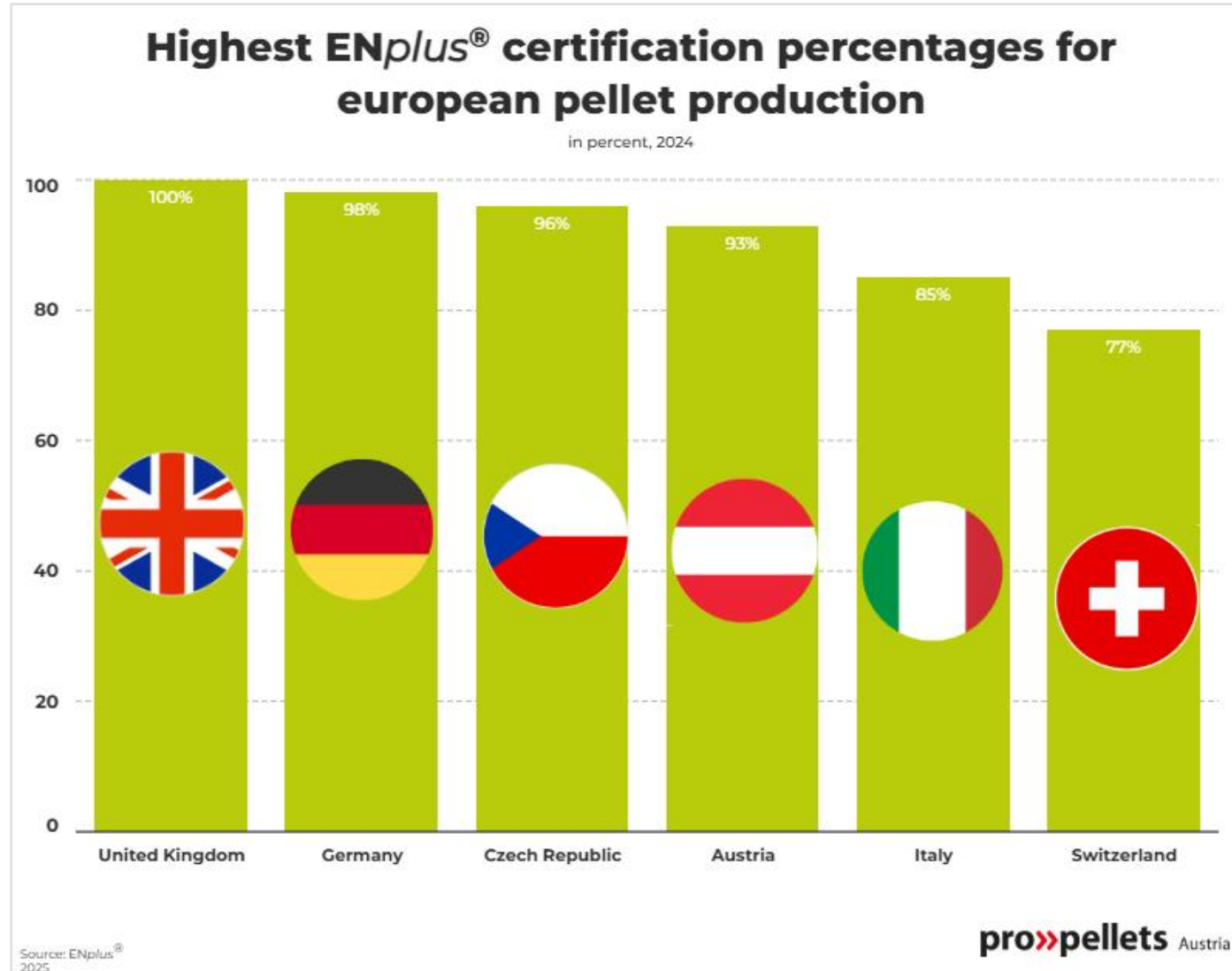
ENplus® certified production

ENplus® Production in Europe

in Tons | 2024

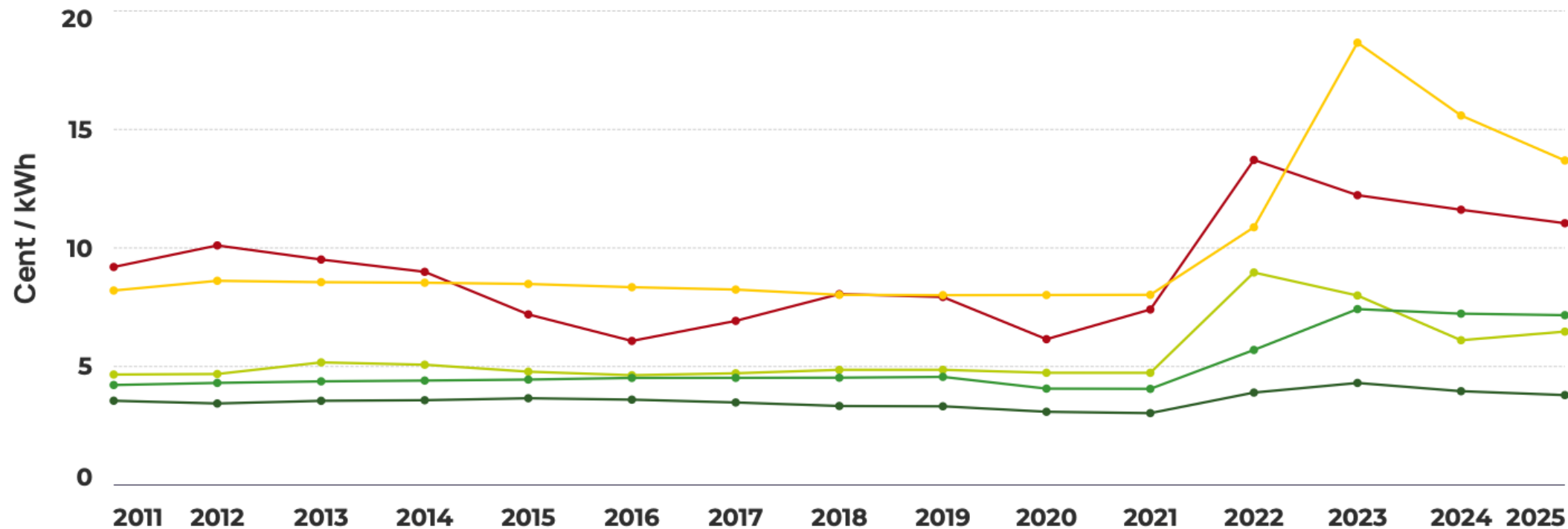


Clear quality standards and certification



Annual Average Prices of Energy Sources

in Cent/kWh | Last updated: 01/2026



■ Fuel oil ■ Natural Gas ■ Pellets ■ Firewood ■ Wood Chips

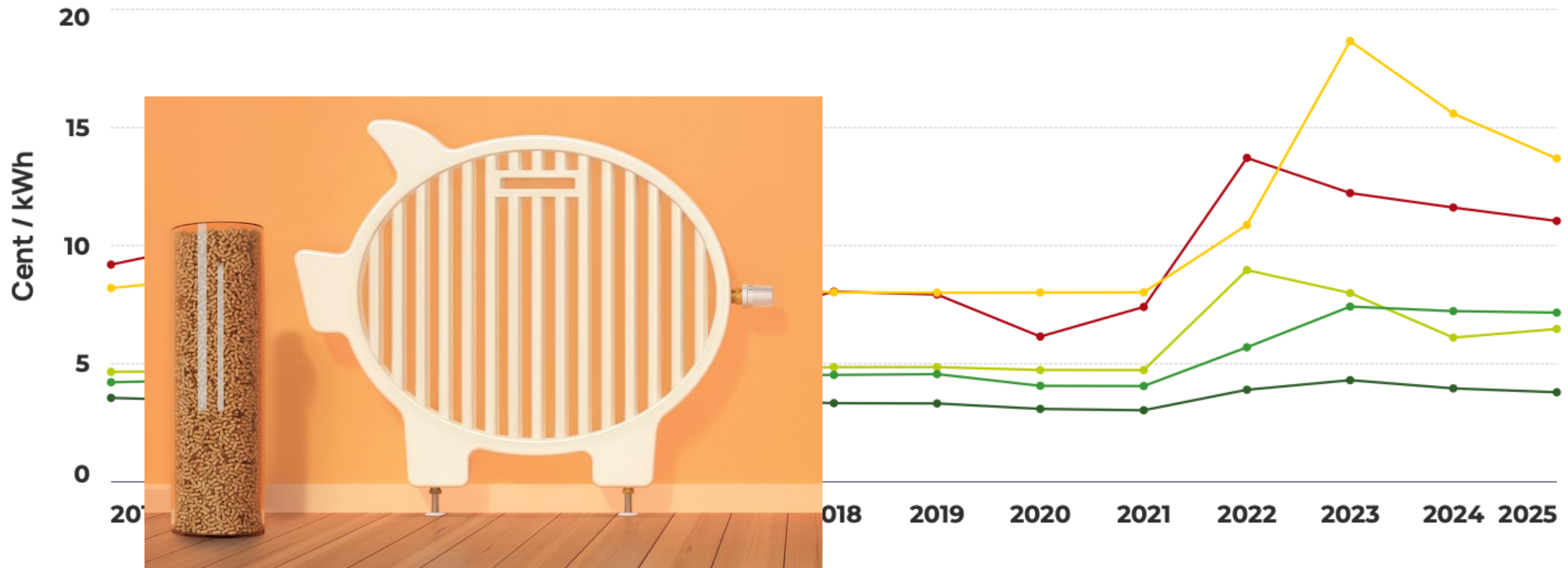
Assumptions: heating oil requirement 3,000l, gas requirement 15.000 kWh, pellet requirement 6t.

Source: proPellets Austria, IWO, BMK and LK. The reference value is the calorific value. This cost comparison does not take into account the efficiency, conversion or investment costs and any maintenance costs of the heating system.

pro»pellets Austria

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Rules & Policy are part of the market

2024 : **Subsidies** for boiler replacement

- » 75% federal funding (up to 100% for low-income households)
- » Additional state funding
- » **24.000** new pellet boilers installed

Goal: Get out of oil and gas – to climate friendly solutions

Whatever it takes - > no matter the cost



- ~~» Subsidies and rules support the market~~
- » The market stays stable even if programs end

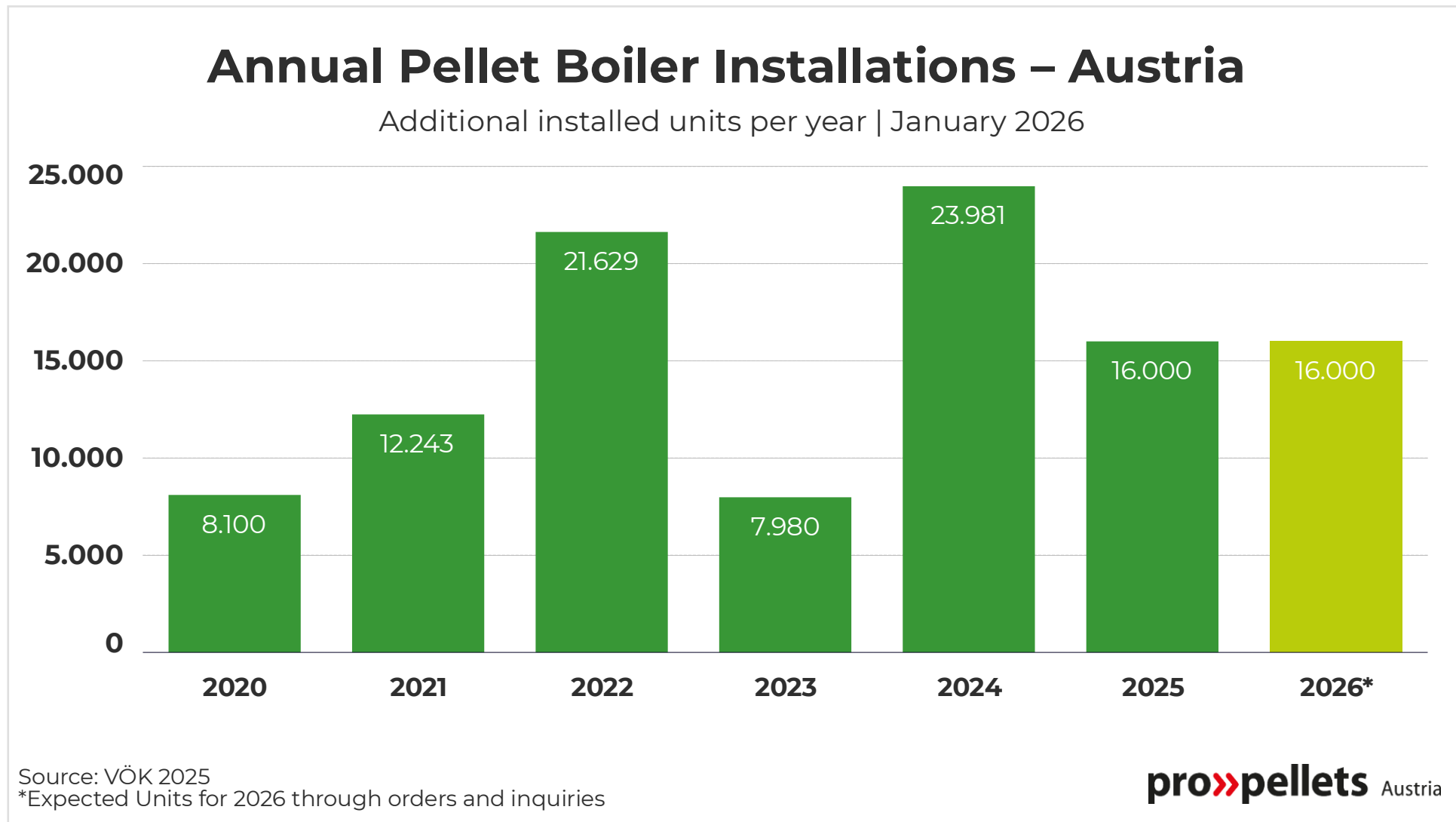


Rules & Policy are part of the market

***“Stop-and-go policies destroy trust –
and trust is the backbone of a mature market.”***



Subsidies work:



***Forecast for 2025 & 2026 based on sales figures, manufacturer feedback and orders**

Rules & Policy are part of the market

“Stop-and-go” policies harm the economy

- **2025: No fundings at all**
- **2026 Small Funding Program:**
 - » € 8.500 subsidy available for boiler replacement
 - » High demand expected in early 2026
 - » Risk that funds will be fully allocated by February
 - » Potential consequence: abrupt halt in boiler replacement projects



Perception? No Visibility !



Pellets – new positioning

A New Geopolitical Reality

- **The Challenge:** Volatile global markets and shifting alliances.
- **The Opportunity:** Repositioning pellets as the **secure, local alternative**.

Pellets are peacekeepers !



Bild: www.zeit.de

Agenda setting & framing

Oil & gas:

- » **Money leaves Austria** – the problems remain
- » Climate damage and job losses instead of domestic value creation

Independence from fossil fuels is a matter of **national security**

- » **Economic growth** and domestic value creation
- » **Reduces grid load** and improves stability in winter

Agenda setting has to be changed

From :

- » Climate protection
- » CO₂ reduction
- » Environmental benefits
- » Efficiency & costsavings



To :

- » Energy independence
- » Secure domestic supply
- » Reliable, crisis-proof and controllable heat
- » Jobs and regional value creation
- » Not supporting wars with oil

Pellets are peacekeepers !

Shift in Communication and Lobbying

Let someone else praise your product

- Trust is built through independent, respected voices
 - Plumber
 - Chimney sweeper
 - Economics
 - Security experts
 - **strong arguments reduce the focus on price**





Sustainable Market need:

- **Quality Assurance:** strict standards (ENplus®) to build trust.
- **Innovative Technology:** modern and efficient heating systems.
- **United Communication:** speak with "one voice"
- **Strong European support / Lobbying**



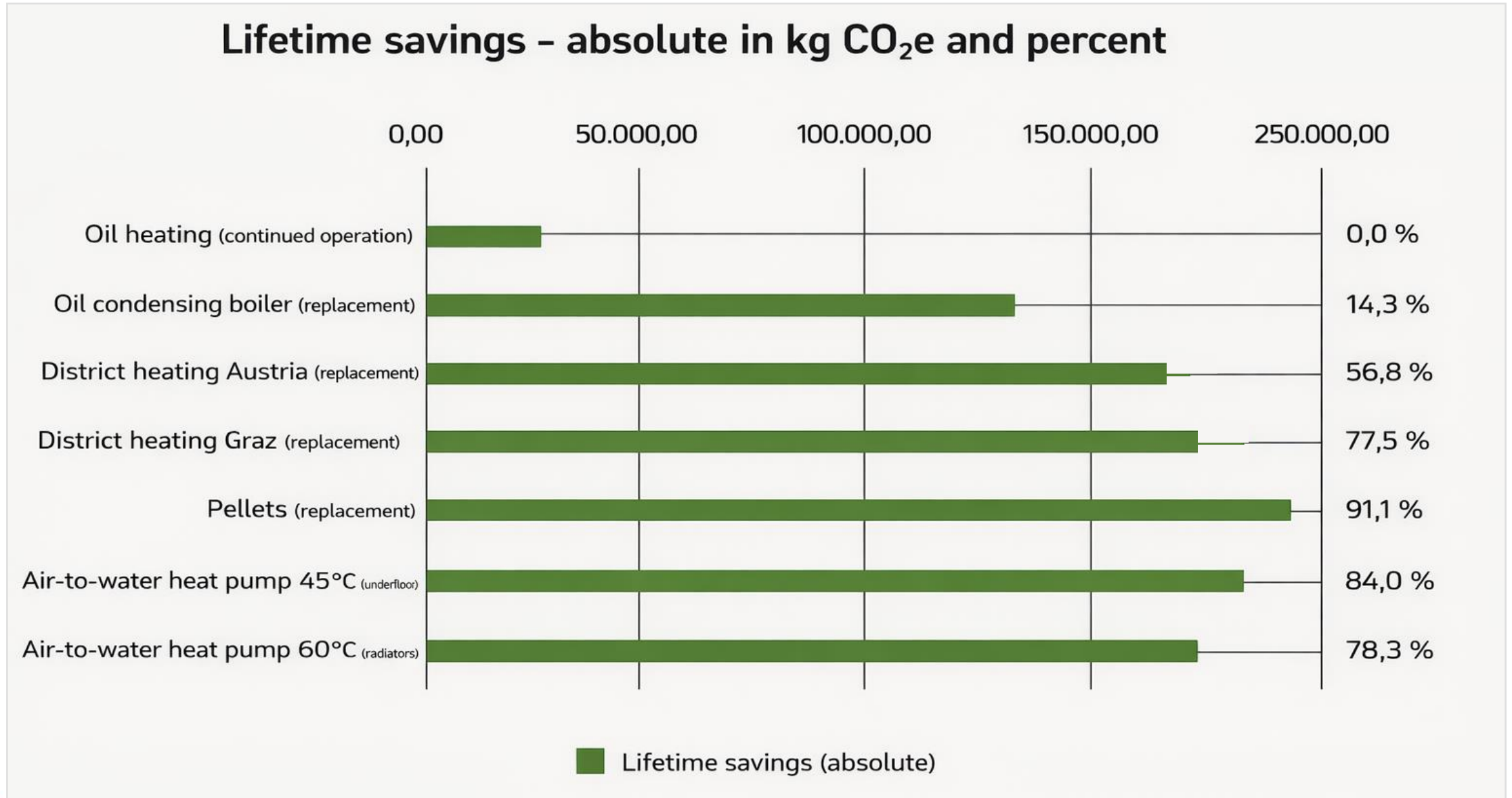
"We do not just sell energy.

We deliver **comfort, independence, and future** "

Brand new study: CO₂ lifespan comparison, Pellets are No. 1

- » The analysis covers the entire life cycle (“cradle to grave”): production, operation, and disposal, based on a typical single-family house (150 m², built 1980).
- » **Pellet heating is clearly the most climate-friendly solution when replacing an old oil boiler**
- » the additional emissions caused by producing and installing a new pellet boiler are offset within a very short period

CO₂ comparison of heating systems – at a glance





Thank you

www.propellets.at

proPellets Austria

Mag. Doris Stiksl MSc

Franz-Josefs-Kai 13/5 | 1010 Wien

Tel.: +43 1 25 32 114

stiksl@propellets.at

