

Survey and Analysis of the US Biochar Industry



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Overview

- ▶ Survey, Analysis, and Preliminary Conclusions
 - ▶ Observations, Context, Next Steps (Tom Miles)
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About Dovetail Partners, Inc.:

Dovetail's Mission Statement:

To provide authoritative information about the impacts and trade-offs of environmental decisions, including consumption choices, land use, and policy alternatives.

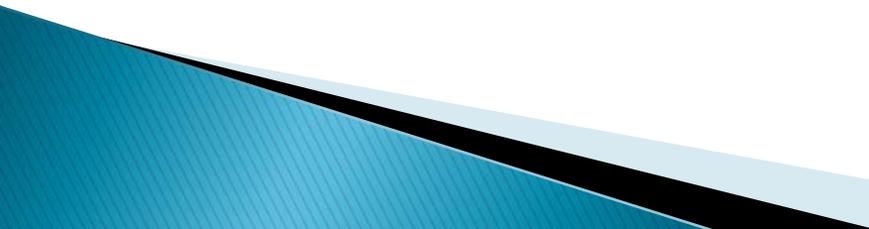
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Project Team

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 - ▶ Martin Twer, Biomass Program Director, The Watershed Research & Training Center; CA
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Producer Survey Design

- ▶ Production Information
 - ▶ Product Information
 - ▶ Supply Information
 - ▶ Location
 - ▶ Historically Effective Support
 - ▶ Growth and Pricing Expectations
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User Survey

- ▶ End-Products Profile
 - ▶ Additional Processing
 - ▶ Market Growth Potential
 - ▶ Cost Information
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Analysis

- ▶ 61 responses from 135 domestic biochar producers; a 45% response rate.
 - ▶ 58 User responses.
 - ▶ Prior to this survey, the US biochar industry's production was estimated to be between 15,000–20,000 tons per year (TPY). This survey provides data to support an estimate of 45,000 TPY.
 - ▶ At that rate, the industry is using an estimated 200,000 bone dry tons of biomass.
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Conclusions

- ▶ Two trends stand out:
 - Both producers and users anticipate growth in sales based on their general optimism about the strength of the marketplace.
 - Both producers and users desire more information and support from all classes of resource providers. (IBI, USBI, Extension, Researchers, Suppliers, and Governments.)

Sidebars

- ▶ Both users and producers see the need for much higher profile education to the public and farmers, specifically.
 - ▶ Biochar as an animal feed supplement was mentioned by both survey groups repeatedly.
 - ▶ Biochar as a *proven* carbon sequestering product was expected to have the greatest potential to enhance its appeal.
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For More Information

- ▶ USBI website: <http://biochar-us.org/news/us-biochar-market-survey-0>
- ▶ Dovetail Partners website: <http://www.dovetailinc.org/reports>

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