

RED II: The future of EU Bioeconomy at stake



Cefic bioeconomy sector groups:

European Resins and Pine Chemicals Industry (HARRPA)

The Pine Chemicals Industry



- Since the early 1900s, the pine chemicals industry has upgraded **tall oil**, a by-product of the paper industry, into **bio-based products** with hundreds of application areas



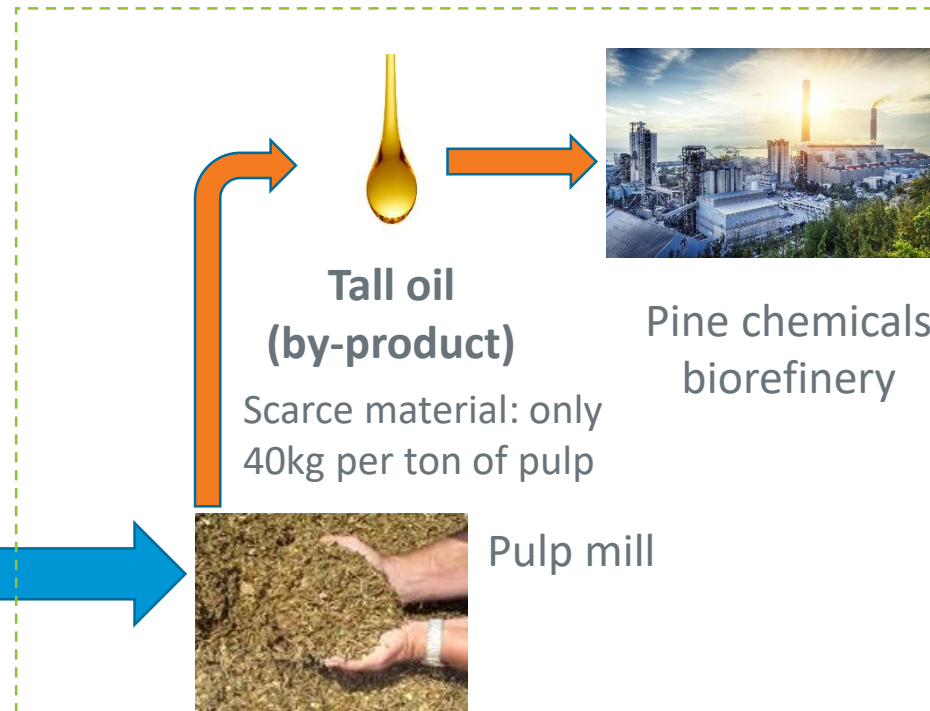
What's tall oil?



HARRPA



It is a by-product of the pulp industry which is upgraded into high value added bio-based chemicals industry (**industrial symbiosis**)



Pine trees

Pulp mill

Paper & box production

Pine chemicals
biorefinery

**Tall oil
(by-product)**
Scarce material: only
40kg per ton of pulp

Innovative uses of refined tall oil contributing to a circular bioeconomy



HARRPA



Anti-inflammatory agent for poultry tackling the issue of microbial resistance by **reducing use of antibiotics in poultry farming**



Additive enabling recycling of asphalt contributing to circular economy and waste minimisation



What's the issue with RED II?



HARRPA



Tall oil is a **scarce raw material** and, as a by-product, its production is limited by the production of pulp



Classifying **tall oil as advanced biofuel** (Annex IX part A – Commission proposal) will risk diverting tall oil from bio-based products towards biofuels



- Minimal impact on decarbonisation of transport sector even if all CTO in Europe would be used for biofuels
- Limit the innovation potential of the pine chemicals industry
- Hinder the circular economy by favoring single technology uses as energy over the production of bio-based products used in many different sectors

HARRPA recommendations



HARRPA



To ensure **coherence between circular economy and the Renewable Energy Directive (RED II)** HARRPA recommends to

1. **Remove tall oil** from the list of feedstock for advanced biofuels (Annex IX, part A).
2. Ensure that advanced biofuels are made from waste and residues with no significant alternative uses.



About HARRPA



HARRPA represents European based producers of hydrocarbon, rosin resins and tall oil

The 6 CTO refiners are world leading producers of bio-based chemicals used in hundreds of everyday products needed for construction, coatings, adhesives, tires, inks, soaps, rubber and other specialised industrial applications. The essential raw material for these refiners is CTO. The CTO refiners have operated for more than 80 years in Europe and are forerunners in the bio-economy through the strong focus on value creation, innovation and efficient use of resources

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