

## 2026 SBP Asia Forum

The 2026 SBP Asia Forum took place in Tokyo, Japan on 24 March 2026. The event was attended by 37 participants representing 24 organisations from three countries (Japan, UK, Vietnam). The attendees represented 24 individual organisations, of which 54% were Certificate Holders (CHs) or prospective CHs.

The organisations that attended the 2026 SBP Asia Forum are listed below:

<b>SBP Certificate Holders (CHs) and Prospective CHs</b>	<b>NON SBP Certificate Holders</b>
CM Biomass	Biomass Industrial Society Network
Enviva	EBG Science and Technology Company Limited
erex Co., Ltd	Earthworm Foundation
Hanwa Co., Ltd.	Institute for Global Environmental Strategies
Iwatani corporation	Japan Woody Biomass Energy Association
Japan Petroleum Exploration Co., Ltd.	Mitsubishi Research Institute Inc.
Marubeni Corporation	Preferred by Nature
Mitsui & Co., LTD.	PwC Consulting LLC
Nippon Paper Industries	SGS Japan
RENOVA	Vietnamese Academy of Forest Sciences
Sumitomo Forestry	YK Partners, Inc.
Sumitomo Corporation	
SOJITZ Corporation	

Note: This Forum was held under the Chatham House Rule.

## Key Takeaways

The Forum opened with a reminder that the event was held under the Chatham House Rule, enabling open discussion while preventing attribution of remarks to individuals or organisations.

A keynote session framed solid biomass as an immediately deployable decarbonisation option, particularly as a drop-in fuel for coal infrastructure. The discussion emphasised that longer-term solutions such as hydrogen and ammonia remain important, but require further time and infrastructure development, while biomass can contribute today provided sustainability and legality expectations are met.

The next set of sessions focused on SBP's certification scheme and priorities. These covered SBP's role as a risk-based sourcing standard, how certification and assurance is structured, and how supply chain data is exchanged through SBP's Data Transfer System (DTS) to support regulatory reporting and greenhouse gas calculations. This dedicated segment discussed SBP's work to embed and align with Japanese regulatory expectations, including ongoing engagement and guidance to support consistent implementation across supply chains. Regional Forums and stakeholder engagement were presented as a core part of SBP's multi-stakeholder model, with transparency and continuous improvement highlighted as key principles.

After a networking break, the agenda shifted to more regional perspectives and the relationship between Vietnam and Japan. A session on the Vietnam Regional Risk Assessment (RRA) outlined how risk-based approaches can identify and manage legality, environmental, and social risks in complex supply chains, including issues such as land tenure verification, traceability, and protection of High Conservation Value areas.

Next up was a presentation that provided an overview of biomass pellet supply chains in the USA and Vietnam and highlighted key environmental, legality and social risk themes that can arise in complex, multi-actor sourcing contexts. It then presented a collaboration model combining responsible sourcing policy support with practical implementation, including supplier engagement in Vietnam (field visits, training, due diligence and action plans), a pilot traceability approach using digital sourcing-area mapping and Safe Operating Procedures (SOPs), and grievance-process support activities in the USA. An example of a Vietnamese supplier was shared as best practice of how collaboration between an international NGO and a buyer could get policy-to-practice gaps closed, in addition to SBP Standards, but also through sustained engagement at the producer level. The session concluded by outlining opportunities for broader collaboration – gap assessments, capacity-building support and ongoing monitoring and verification, including satellite-based monitoring described as enabling time-series traceability and detection of conversion risks.

The next speaker outlined the expected trajectory and key constraints for biomass power in Japan, drawing on the country's latest energy planning assumptions. It noted that electricity demand is projected to rise by 10–20% by 2040, while biomass is expected to increase from around 4% to 5–6% of generation, positioning it as a dispatchable renewable with a steady role in the power mix. The presentation summarised current deployment at around 290 wood-fuel FIT/FIP plants, with 7,325MW of FIT/FIP-certified capacity (September 2024) and 4,963MW operating volume, projected to grow towards ~6,000MW by 2030. It also highlighted rising import volumes of Palm Kernel Shell (PKS) and wood pellets (record levels reported for 2025) and pointed to evolving sustainability expectations, including third-party certification requirements for certain fuel categories after April 2024.

In the afternoon, participants took part in structured breakout discussions. In one breakout group the participants discussed how the sector could more effectively articulate the rationale for biomass power in Japan and identified four priority audiences: policymakers, utilities, civil society, and the media. Discussion emphasised that policy audiences are central and that biomass can be positioned as a near-term, practical decarbonisation option because the technology is already available, retrofits can be implemented quickly, and costs may compare favourably with other emerging options such as hydrogen and ammonia. Participants also noted that wider public understanding of energy choices is limited and that clearer communication – potentially supported by assurance actors could help address misconceptions, including by explaining feedstock realities (e.g., use of residues).

In the other breakout group the participants explored how collaboration between Japan and supplying countries could support both sustainability and practical implementation of Japan's requirements. Themes included the need for greater transparency and data availability across supply chains, recognising that gathering and tracing information can be complex – particularly for Greenhouse Gas (GHG) objectives. The group discussed using tools such as risk assessments to identify and mitigate risks and highlighted the value of Forums and similar events for shared learning between supply-chain actors. Participants also suggested more direct engagement between End-users and sourcing regions (e.g., site visits) and closer cooperation among suppliers, traders, and End-users under common schemes, while noting practical constraints such as frequent document updates and limited human resources.

The day last session of the day was a panel discussion on lifecycle GHG accounting for biomass, focusing on what data are needed for robust calculations and how assurance strengthens confidence in reported results. The panel clarified that emissions reporting follows the standard regulatory framework (Japan-aligned and comparable to EU approaches) across feedstock,

transport, processing and generation, and that SBP certification supports this by providing the necessary supply chain and activity data rather than calculating emissions itself.

Discussion also highlighted practical implementation issues, including the use of default vs actual values (and the need to verify calculations), the value of measuring inputs to processing/combustion where records are strongest, and the growing importance of lifecycle GHG assessment as a licence-to-operate issue in Japan. Finally, third-party verification was emphasised as central to credibility – particularly where calculations are complex and public confidence matters.

The Forum concluded with appreciation for participants' strong engagement and the constructive spirit of dialogue throughout the day. Discussions were characterised by open exchange and mutual respect, underscoring the value of collaboration and shared understanding in advancing sustainability across the biomass supply chain. SBP thanked all contributors and local partners for their support and reiterated its commitment to continued regional dialogue and practical, credible solutions going forward.

### **SBP reflections**

From SBP's perspective, the 2026 Asia Forum highlighted ongoing demand for clear, accessible explanations of SBP's certification scheme alongside more in-depth technical discussion tailored to the Japanese context, including practical implications for supply chain data, lifecycle GHG reporting and emerging regulatory expectations. SBP will use the feedback received to refine future agendas and communications, balancing strategic updates with operational detail.

The Forum also confirmed the value of SBP Regional Forums as a practical mechanism for two-way dialogue and continuous improvement. Participant feedback was strongly positive, with 13 of 14 respondents indicating that the event met their expectations while also highlighting clear opportunities to strengthen future Forums. SBP welcomes the feedback and will use it to refine future engagement in Asia, strengthen collaboration across the region, and ensure SBP's tools, guidance and support remain fit-for-purpose in a changing policy and market environment.

Finally, the event reinforced the importance of continued engagement in Asia and in Japan in particular, including regular opportunities for stakeholders to connect and provide input as markets and policy expectations evolve.