Sustainable Biomass Program

Strategy 2026–2030

Contents

Foreword

As nations and industries intensify their climate commitments, the role of sustainable biomass has never been more critical, or more scrutinised. Over the past decade, the Sustainable Biomass Program (SBP) has grown into a globally recognised certification scheme, providing the assurance, accountability, and insight needed to support responsible biomass sourcing.

Our Strategy for the five-year period 2026–2030 marks a pivotal moment in our journey. It builds on a strong foundation of progress and positions SBP to lead with integrity, innovation, and impact. Our Purpose remains clear: to expand the contribution of good biomass to the global bioeconomy.

This includes applying the cascading use principle across all biomass applications, not just energy, to ensure biological resources are used efficiently and in alignment with circular bioeconomy goals.

We do this by defining sustainability criteria, verifying responsible sourcing practices, supporting our Certificate Holders, and enabling markets to grow sustainably.

The next five years will see us deepen our impact across four Strategic Aims:

- Defining good biomass through sustainability criteria.
- Growing recognition and acceptance of SBP Standards.
- Supporting Certificate Holders to meet their climate, biodiversity and social goals.
- Diversifying the sources and uses of SBP-certified material.

These aims are underpinned by five Focus Areas that guide our work, from standards development and regulatory compliance, through certification and assurance to data capture, traceability and impact to engagement and collaboration with interested and impacted parties, and market development.

Our **Theory of Change** provides the strategic logic that connects our actions to long-term outcomes. It reflects our belief that sustainability must be more than an ambition, it must be a verified reality. Through robust certification, transparent data systems, and inclusive governance, we aim to be a catalyst for positive change.

Our Strategy is not just a roadmap, it is a reaffirmation of our commitment to continuous improvement, engagement and collaboration, and evidence-based decision-making. Together with our wider community, we are ready to shape a more sustainable, inclusive, and resilient bioeconomy. Through this Strategy, we will deliver tangible goals that drive meaningful progress and measurable impact.

Francis Sullivan
Chair

Carsten Huljus
Chief Executive Officer

Executive summary

Executive summary

As the world accelerates towards net zero by 2050, the Intergovernmental Panel on Climate Change (IPCC) has made clear that bioenergy from sustainably sourced biomass is a necessary component of the future energy mix.

This is not a peripheral view, it reflects global scientific consensus. SBP exists to ensure that this biomass is not only sustainable, but also aligned with the cascading use principle, prioritising material uses before energy recovery.

Certification plays a critical role in ensuring that biomass sourcing is legal, sustainable, and aligned with climate and biodiversity goals. SBP provides a robust, science-based framework that goes beyond regulatory compliance, offering assurance, traceability, and credibility across diverse markets. As the biomass sector evolves, we are uniquely positioned to serve as the certification scheme of choice: trusted by regulators, recognised by markets, and responsive to the needs of civil society.

Our Strategy for the five-year period 2026–2030 sets out a bold and forward-looking roadmap to expand the contribution of good biomass to the global bioeconomy. *Good biomass*, as defined by SBP Standard 1 (v2.0), reflects our specific sustainability criteria and certification requirements. Whilst *sustainable biomass* is used more broadly in policy and market contexts, *good biomass* represents the verified, high-integrity material certified under the SBP scheme; biomass that supports climate goals without compromising ecological integrity or public trust.

Building on over a decade of progress, this Strategy reinforces our role as a trusted, science-based certification scheme that enables responsible biomass sourcing and supports the transition to a circular bioeconomy.

Strategic context

The global landscape for biomass is evolving. As governments, industries, and civil society intensify efforts to decarbonise, the demand for traceable, sustainable biomass is growing, across energy, transport, construction, industrial applications, and carbon removal sectors. At the same time, expectations for environmental integrity, social responsibility, and data transparency are rising.

We are uniquely positioned to meet these challenges. With a robust certification scheme that serves as a sourcing standard for good biomass, advanced digital infrastructure, and a multi-stakeholder governance model, SBP provides the assurance, accountability, and insight needed to support sustainable market growth.

Purpose and Strategic Aims

- At the heart of the Strategy is our enduring **Purpose.**
- This is supported by four **Strategic Aims.**
- To operationalise these aims, we will prioritise five cross-cutting **Focus Areas.** Each Focus Area is underpinned by a clear set of Key Activities, Performance Indicators, and a commitment to continuous improvement.

Theory of Change

Our Theory of Change provides the logic linking our activities to long-term impact. It outlines how our certification scheme, engagement and collaboration, and data systems contribute to responsible sourcing, climate action, biodiversity protection, and social well-being, whilst supporting the UN Sustainable Development Goals (SDGs).

Governance and resilience

We will continue to operate as a lean, transparent, and financially resilient organisation. Our governance model ensures balanced representation, robust oversight, and inclusive decision-making. Strategic investments in people, systems, and partnerships will support our leadership in addressing emerging global sustainability demands.

Our commitment

We remain committed to:

- Upholding the integrity of our certification scheme.
- Supporting the responsible growth of the bioeconomy.
- Delivering value to Certificate Holders, regulators, civil society, and the wider public.

Through our Strategy, we reaffirm our role as a catalyst for sustainable biomass sourcing and a trusted partner in the global transition to a circular bioeconomy.

In a landscape of multiple certification schemes, our unique value lies in our science-based Standards, independent assurance, and commitment to the cascading use principle, ensuring that biological resources are used efficiently, responsibly, and in alignment with the highest sustainability criteria.

SBP today: Over a decade of progress

Section 1

SBP today: Over a decade of progress

Overview of SBP's evolution and achievements

Since its establishment in 2013, SBP has grown into a globally recognised voluntary certification scheme for the sourcing of sustainable biomass. Over the past decade, SBP has achieved several key milestones:

- Launched a robust set of Standards for legal and sustainable biomass sourcing.
- Successfully introduced a risk-based approach and strengthened that with the development of Regional Risk Assessments (RRAs).
- Transitioned to a multi-stakeholder governance model, marking a significant shift towards greater inclusivity, transparency, and independence.
- Achieved full financial independence through a self-financing model, ensuring long-term sustainability and autonomy.
- Implemented full digitalisation with the Data Transfer System (DTS) and Audit Portal.
- Gained recognition under EU RED and became an ISEAL Community Member.
- Expanded its global footprint with Certificate Holders in over 30 countries.

Current positioning and capabilities

Today, SBP stands as a trusted, science-based, and data-driven standards-setting body. Its core capabilities include:

- Rigorous, consensus-driven Standards aligned with international regulations and formally recognised by competent authorities.
- Independent third-party accreditation and certification decision-making, in compliance with ISO standards.
- Advanced digital infrastructure enabling traceability.
- Established a global network of Certificate Holders.
- Secured a significant share of certified biomass in Europe.
- A trusted and recognised role in the biomass sector.

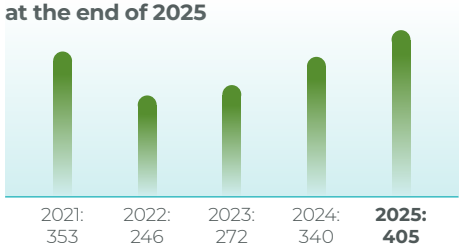
Strategic readiness

As SBP looks ahead to the 2026–2030 period, it is strategically positioned to lead the next phase of sustainable biomass sourcing certification, including:

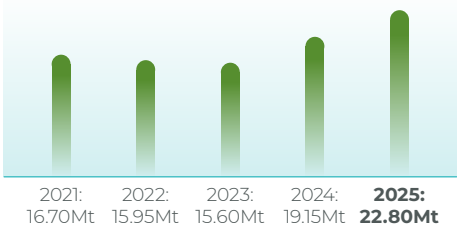
- Supporting the transition to a circular bioeconomy.
- Expanding into new geographies, feedstocks and end-uses.
- Demonstrating impact through transparent, evidence-based performance reporting.
- Providing credible, data-backed insights to inform policy and investment.
- Enhancing engagement and collaboration with interested and informed parties.

5
accredited Certification Bodies

405
Number of Certificate Holders at the end of 2025

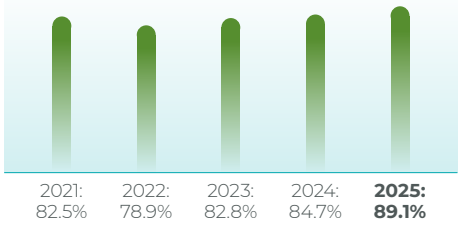


22.80Mt
Total SBP-certified biomass produced and sold in 2025
of which 15.90Mt pellets and 6.90Mt chips



21.70Mt
Total SBP-certified biomass consumed in Europe in 2025[1,2]
of which 15.00Mt pellets and 6.70Mt chips

89.1%
Share of industrial pellet consumption in Europe[2,3]



35 **countries making up the geographic spread of Certificate Holders**

- Australia
- Belgium
- Brazil
- Canada
- Chile
- China
- Colombia
- Denmark
- Estonia
- France
- Germany
- Guadeloupe
- Indonesia
- Ireland
- Italy
- Japan
- Latvia
- Liberia
- Lithuania
- Luxembourg
- Malaysia
- Martinique
- Netherlands
- Norway
- Portugal
- Réunion
- Singapore
- South Africa
- Spain
- Sweden
- Switzerland
- Thailand
- UK
- USA
- Vietnam

Notes:
Figures are derived from Data Transfer System (DTS) data. Tonnages are rounded to the nearest 0.05Mt . [1] Purchased by European End-users, including non SBP-certified.
[2] Europe refers to Belgium, Denmark, Finland, France (and French territories), Netherlands, Poland, Sweden, United Kingdom and Other EU27. [3] Hawkins Wright, 2025 industrial pellet demand estimates for combined heat and power, and dedicated power.

Introduction

Section
2

Introduction

Over the past decade, SBP has evolved into a globally recognised certification scheme for the sustainable sourcing of biomass.

As a voluntary, multi-stakeholder initiative, we have consistently defined and verified what constitutes good biomass through our Standards, helping to build confidence across markets and strengthen environmental and social safeguards throughout the supply chain.

In parallel, the strategic importance of biomass is increasingly recognised in global climate and energy frameworks. Our Standards reflect this by embedding the cascading use principle and aligning with internationally recognised sustainability goals. This ensures that certified biomass contributes meaningfully to climate mitigation, biodiversity protection, and social responsibility.

SBP complements sustainable forest management certification schemes by focusing specifically on the responsible sourcing of feedstock used in biomass production. Whilst forest management schemes, such as FSC® and PEFC, certify forest practices directly, our certification scheme builds on these where applicable and extends assurance through a risk-based approach that addresses sustainability risks in regions without forest certification.

This ensures that biomass sourcing meets high standards of environmental and social responsibility, even where forest certification is not present.

Our Strategy covering the period 2023–2025 successfully guided our work through a time of substantial regulatory change, increased market scrutiny, and internal transformation. Importantly, the Strategy was purposefully designed to be adaptive, allowing us to remain responsive to an evolving landscape without the need for wholesale change. That strategic approach has served us well.

The external landscape continues to evolve, not only in terms of policy and market dynamics, but also in public expectations and the maturity of biomass value chains. As we look ahead to the next phase of SBP's development, the coming five-year period 2026–2030 will be pivotal in consolidating our role as the certification scheme of choice for sustainable sourcing of biomass and positioning SBP to contribute even more meaningfully to the circular bioeconomy.

Reflecting on 2023–2025

A review of our performance during the 2023–2025 strategy period shows strong progress against our Strategic Aims. Successes include:

- The successful launch of SBP Standards (v2.0), incorporating updated sustainability criteria and improved system design.
- Continued growth in the volume of certified biomass, with an expanding footprint in both OECD and non-OECD markets.
- Ongoing expansion of our Certificate Holder base, supported by a strong pipeline of new applicants.
- Formal recognition by the Government of Japan, confirming the credibility of the SBP certification scheme in a priority geography.
- Development and rollout of additional Regional Risk Assessments (RRAs), helping to improve consistency, efficiency and risk identification across sourcing regions.

These successes confirm the value of the strategic framework for 2023–2025, whilst also highlighting opportunities for future growth and diversification. In particular, we have seen the importance of investing in data infrastructure, improving our engagement with civil society, and supporting Certificate Holders to meet more ambitious environmental, social, and governance expectations. That is why we will continue to build on the 2023–2025 strategic approach, refining and refreshing it, rather than replacing it, so that it remains fit-for-purpose in an evolving context.

Introduction (continued)

Building on a strong foundation

The Strategy for the period 2026–2030 does not mark a departure from the previous Strategy, but an evolution. Our approach builds on a strong foundation, enabling us to respond to emerging opportunities and challenges whilst maintaining a clear and consistent direction grounded in the Purpose, Strategic Aims and Focus Areas set out for the period 2023–2025.

An evolutionary path brings stability and confidence to supply chain actors and business partners, and at the same time demonstrates to regulators and civil society that SBP continues to be a credible, reliable, and forward-looking certification scheme.

Based on lessons learned and informed by feedback from interested and impacted parties, we have refined key elements, including a clearer alignment between Strategic Aims and Focus Areas, and a stronger articulation of how our work contributes to wider outcomes.

Importantly, we continue to broaden the scope of our work, carefully extending from woody biomass to include agricultural residues and energy crops, and from energy use alone to encompass emerging applications in materials and transport fuels. This expansion reflects real-world shifts in policy and market demand and allows us to make a wider contribution to the circular bioeconomy, in line with our Purpose.

Aligning strategy and standards revision cycles

The decision to adopt a three-year Strategy in 2023 was shaped by the need for agility amid regulatory flux, particularly in the EU and UK. That approach allowed us to remain responsive and build strategic momentum. With that foundation now in place, and with SBP entering a new phase of maturity, we are ready to extend the horizon and adopt a five-year cycle.

This new five-year Strategy is aligned with the frequency of our standards review cycles. Whilst the two cycles are not fully synchronised, the alignment marks an important step. Interested and impacted parties have emphasised the importance of having a clearly articulated strategic direction in place at the outset of any standards review process.

Having a clear and broadly communicated strategy-led approach will provide clarity on scope, ambition and priorities, and help ensure that any revision is aligned with our objectives and strengthens the overall integrity of the SBP scheme. Each standards review, and if necessary, revision, will be initiated by the Board, with a formal instruction to the Standards Committee setting out the Board's aims, goals and ambitions for the review. This instruction will be informed by, and aligned with, the Strategy, but not limited by it, ensuring that the Board retains full oversight and flexibility to respond to emerging priorities.

Looking ahead

Our Strategy sets a clear course for 2026–2030. Grounded in our Purpose and Theory of Change, and structured around a coherent set of Strategic Aims, Focus Areas, and Key Activities, it ensures that our actions remain targeted, transparent, and outcome-driven.

At the heart of this Strategy is our role as a provider of assurance, accountability, and integrity, enabling markets to grow responsibly and in alignment with credible sustainability outcomes.

Introduction (continued)

The following table presents the set of Indicators aligned with each of our Strategic Aims for the 2023–2025 Strategy period, along with the corresponding results and metrics used to measure progress.

Strategic Aim	Indicators	2022 Baseline	2023	2023 Year-on-year	2023 vs Baseline	2024	2024 Year-on-year	2024 vs Baseline	2025	2025 Year-on-year	2025 vs Baseline
Define and certify good biomass	**Volume of SBP-certified biomass produced and sold[1]/Mt**	**15.95**	15.60	↓	↓	19.15	↑	↑	22.80	↑	↑
	Volume of SBP-certified biomass consumed[1]/Mt	**14.80**	14.80	↓	↓	18.70	↑	↑	22.50	↑	↑
Grow recognition and acceptance of the SBP Standards	**# Certificate Holders**	**246**	272	↑	↑	340	↑	↑	405	↑	↑
	# Regulatory authorities recognising SBP Standards	**5**	6	↑	↑	6	–	↑	6	–	↑
	ISEAL Code Compliant membership	**–**	–	–	–	–	–	–	–	–	–
	% Share of European industrial pellet consumption market	**78.9**	82.8	↑	↑	84.7	↑	↑	89.1	↑	↑
Support Certificate Holders to meet their climate, biodiversity and social goals	**Certificate Holders satisfaction with SBP support**	**High[5]**	High	–	–	High	–	–	High	–	–
	# Non-OECD countries with SBP certification[2]	**8**	7	↓	↓	9	↑	↑	9	–	↑
	# Countries/regions covered by RRAs[3]	**6**	6	–	–	6	–	–	8	↑	↑
	% Certificate Holder dataset included in global greenhouse gas emissions analysis	**–**	–	–	–	–	–	–	–	–	–
Diversify the sources and uses of SBP-certified material	**# Countries with SBP-certified End-users**	**12**	7	↓	↓	12	↑	–	15	↑	↑
	# Feedstock sources[4]	**1**	1	–	–	1	–	–	1	–	–

Notes:

[1] Wood pellets and chips with SBP claim. [2] Historically, we have been very active in Europe, North America and other Organisation for Economic Cooperation and Development (OECD) countries. Our Strategy aims to extend our reach to organisations in non-OECD countries and to support them meeting their climate, biodiversity and social goals. [3] Regional Risk Assessments (RRAs) identify, assess and manage risks associated with feedstock sourcing across an entire country or region, avoiding the need for individual Biomass Producers to conduct risk assessments. RRAs cover all the Indicators in Standard 1 [4] Feedstock sources could include forest, trees outside the forest, and/or non-woody biomass.
[5] Added value question not asked in 2022, but 95% of respondents were at least satisfied with the 'service', so have deemed that as 'high' for the baseline; high=>75%, medium=50-74%, low<50%.

The external landscape: Outlook to 2040

Section
3

The external landscape: Outlook to 2040

As the global economy accelerates its shift towards decarbonisation, circularity, and sustainable resource use, biomass is emerging as a critical enabler of this transformation. Whether sourced from forests, agriculture, or post-consumer residues, biomass underpins governments' low-carbon strategies across multiple sectors, from energy and transport to chemicals and materials. At the same time, pressures on land, climate resilience, and biodiversity are shaping the contours of future supply.

This outlook to 2040 offers a comprehensive view of both the demand- and supply-side dynamics influencing the role of biomass in the global bioeconomy.

It places SBP's 2026–2030 strategic planning in the wider context of shifting policies, market developments, interested and impacted parties' expectations, and sustainability imperatives.

Demand-side dynamics to 2040: evolving markets, policies and pathways

Biomass demand is being driven by the transition to a low-carbon, circular economy, supported by governments' policy targets, corporate net-zero commitments, and technological innovation. At the same time, shifting end-use applications, from power generation to bio-based materials and other fuels, are introducing new dynamics and uncertainties around scale, timing, and feedstock suitability.

The section examines structural demand drivers across key sectors, the influence of climate and energy policy, and the implications for biomass sourcing and market development out to 2040.

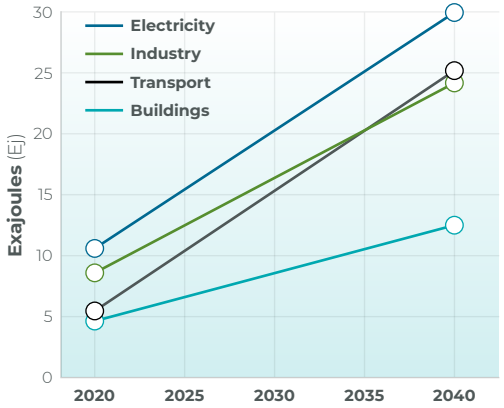
Established and emerging end-uses

In energy, solid biomass remains a dominant renewable resource for dispatchable electricity generation and thermal energy, particularly in Europe and parts of Asia. Combined heat and power (CHP) remains important, especially in colder climates with high seasonal heat demand.

Biomass continues to play a critical role in many national governments' plans to decarbonise hard-to-abate sectors, such as steel, cement, aluminium, and chemicals, where it can be used, to an extent, to replace fossil carbon sources. In the transport sector, biofuels, including advanced bioethanol, biodiesel, and sustainable aviation fuel (SAF), are increasingly mandated through transport regulations and are seen as essential to reducing emissions from long-haul aviation, maritime and heavy-duty vehicles.

The use of biomass as a renewable carbon source is also advancing in sectors such as packaging, textiles, and bioplastics, supporting the transition to a circular bioeconomy.

Projected biomass demand by sector from 2020 to 2040



Source: Derived from IRENA World Energy Transitions Outlook 2023 and 2024.

Policy drivers and regulatory signals

Public policy remains a decisive driver of biomass demand. Forward-looking regulatory frameworks, such as the EU's Renewable Energy Directive (REDIII), Emissions Trading System (EU ETS), Carbon Removals and Carbon Farming (CRCF) Regulation, and the EU Bioeconomy Strategy, incentivise sustainable biomass use across energy, materials, and carbon removal sectors.

In the UK, the Renewable Transport Fuel Obligation (RTFO), which includes the Sustainable Aviation Fuel (SAF) Mandate, alongside the Emissions Trading Scheme (UK ETS), the Contracts for Difference (CfD) scheme, and the UK Biomass Strategy, provide long-term signals for investment in bioenergy and carbon removals.

In the US, the Inflation Reduction Act (IRA) and state-level Low Carbon Fuel Standards (LCFS) drive demand through tax credits, subsidies, and carbon intensity targets.

In Canada, the Clean Fuels Regulations and complementary provincial programmes, such as British Columbia's LCFS, shape market conditions for biomass deployment.

Japan's Strategic Energy Plan for 2040, incorporating the Basic Hydrogen Strategy and the Feed-in Tariff (FIT) and Feed-in Premium (FIP) systems, supports the integration of biomass into a diversified low-carbon energy mix.

Together, these frameworks not only incentivise the use of biomass through subsidies, tax incentives blending mandates, carbon pricing, and carbon removals, but also provide the long-term policy certainty and market signals organisations need to invest confidently, scale operations, and commit to rigorous certification schemes.

Increasingly, these frameworks favour feedstocks with higher environmental integrity, that is, feedstocks that are sourced and produced in ways that minimise ecological harm, protect biodiversity, maintain soil and water quality, and contribute to climate mitigation goals. For example, REDIII prioritises the use of wastes and residues, and includes strengthened sustainability criteria. The UK Biomass Strategy (2023) sets out a hierarchy of biomass use, aligned with net zero goals. The EU Deforestation Regulation (EUDR) further tightens requirements by mandating detailed geolocation data and due diligence for biomass sourced from deforestation and sustainability-risk-prone countries. These developments create a clearer, but more selective, demand signal for certified, traceable and sustainable biomass.

The external landscape: Outlook to 2040 (continued)

Decentralisation, digitalisation and geopolitical realignment

Biomass trade is increasingly shaped by energy security concerns, domestic resource strategies, and digital innovation. As countries reduce fossil fuel imports, some are investing in local biomass production and valorising domestic residues. At the same time, cross-border trade in wood pellets and other biomass commodities remains robust, especially in Asia, where Japan and South Korea continue to import significant volumes from North America and Southeast Asia.

The use of geospatial data, remote sensing, and traceability tools is beginning to influence biomass supply chains. These technologies offer new ways to ensure legal and sustainable sourcing, support regulatory compliance (for example, EUDR), and enhance transparency across global markets.

Decarbonising heavy industry and scaling removals

Heavy industry, including cement, steel, chemicals, food processing and textiles, is emerging as a new area of demand. Industrial users are exploring biomass for process heat and low-carbon production pathways. Bioenergy with carbon capture and storage (BECCS) is attracting interest as a negative emissions technology, particularly in Denmark, Sweden, the UK, and the US. However, its long-term uptake depends on carbon pricing signals, project financing, lifecycle accounting rules, and sustainable feedstock availability.

In addition to growing interest in carbon-rich biomass products such as biocoal, biochar, and biocarbon, biomass is also gaining traction in both voluntary and compliance carbon markets.

Standards for engineered removals, such as those supported by Puro.Earth and other carbon certification frameworks, are beginning to recognise biomass-based pathways, creating new market incentives and risks.

Electrification and AI

Global electricity demand is entering a new phase of rapid expansion, driven by the widespread push to electrify everything, from transport and heating to industrial processes, and by the surging energy needs of AI and data centres. According to the International Energy Agency (IEA), electricity demand from data centres alone is expected to more than double by 2030, with AI-optimised centres accounting for nearly half of this growth. In advanced economies, data centres are projected to drive over 20% of electricity demand growth between now and 2030.

This trend is part of a broader shift: electricity demand grew by 4.3% globally in 2024, nearly double the pace of the previous decade.

The IEA forecasts that electricity will account for more than 30% of final energy consumption by 2040, up from 19% today.

As the world electrifies, the need for low-carbon, dispatchable baseload power becomes increasingly urgent. Whilst solar and wind dominate capacity additions, their variability creates a growing need for firm renewable sources. Biomass, particularly in the form of BECCS and CHP systems, is well-positioned to meet this need. In the IEA's Net Zero Emissions scenario, bioenergy provides 5% of global electricity generation by 2050, with a significant share coming from solid biomass.

This reinforces the strategic importance of biomass in the energy transition, as a flexible and reliable complement to intermittent renewables. As electricity demand accelerates, especially in AI-intensive sectors, biomass may play a larger role in ensuring grid stability and supporting decarbonisation goals.

Competing uses and demand tensions

Whilst overall demand is expected to rise, biomass faces growing competition across its various applications. Policymakers increasingly prioritise uses that deliver the greatest carbon benefit and resource efficiency. The cascading use principle, which favours long-lived material applications before energy recovery, is being embedded in national and regional bioeconomy strategies.

Meanwhile, demand for biomass as a carbon sink, via BECCS or long-lived materials, is creating new trade-offs between short-term energy use and long-term carbon storage.

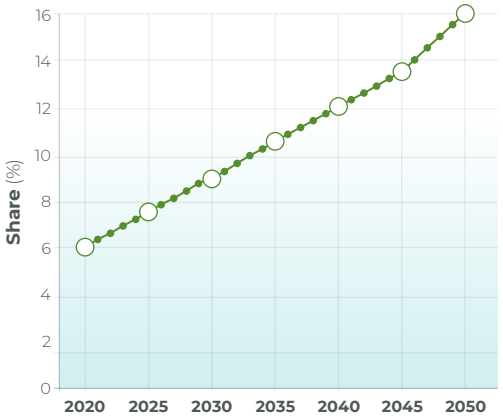
This intensifies the need for transparent, robust lifecycle emissions data and accounting, and sustainability assurance across sectors.

Market outlook and demand uncertainty

Outlooks for biomass demand vary widely based on decarbonisation ambition, policy convergence, technological adoption and societal acceptance. The IEA's Net Zero by 2050 scenario suggests biomass (including woody and non-woody sources) could account for 15-20% of total primary energy demand by 2040, with strong roles in transport, industry, and carbon removals.

IRENA's 1.5°C scenario, forecasts the share of biomass to rise from approximately 6% in 2020 to 16% by 2050, reflecting the increasing role of sustainable bioenergy in decarbonising global fossil-fuelled energy systems. However, uncertainties around feedstock constraints, public perception and regulatory alignment remain.

Projected share of biomass in total global energy demand from 2020 to 2050



Source: Derived from IRENA World Energy Transitions Outlook 2023 and 2024.

The external landscape: Outlook to 2040 (continued)

Traditional wood fuel, primarily firewood and cooking fuel, accounted for approximately 42.5% of total wood use, reflecting its continued importance in rural regions across Africa, Asia, and Latin America. Industrial roundwood, used in pulp, paper, and construction, is estimated to represent 26.0%, whilst modern biomass used in energy production (wood pellets and chips) represented a modest 5.4%. The remaining 26.1% falls under other uses, including furniture, packaging, and miscellaneous wood products.

By 2040, the overall volume of wood use is expected to grow significantly to six billion cubic metres, driven by industrial decarbonisation, bioenergy expansion, and material substitution. Traditional wood fuel is projected to decline in relative terms to 31.2%. Industrial roundwood is expected to grow to 35.0%, whilst modern biomass increases to 15.0%, reflecting technological uptake and policy support. Other uses are projected to account for 18.8%, underscoring the continued relevance of wood-based materials in the circular bioeconomy.

These figures highlight both the scale and diversity of wood-based energy use globally, reinforcing the importance of sustainable sourcing and certification in meeting future demand, whilst avoiding lasting negative impacts. A consistent trend across scenarios is the growing emphasis on traceable, certified, and high-integrity biomass. Schemes such as SBP, through risk-based approaches, lifecycle GHG tools, and in time, geospatial assurance, are becoming essential enablers of market access and policy compliance.

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Global wood production breakdown by use: estimated 2024 and projected 2040

1 Traditional wood fuel	42.5%
2 Industrial roundwood	26.0%
3 Modern biomass	5.4%
4 Other uses	26.1%

1 Traditional wood fuel	31.2%
2 Industrial roundwood	35.0%
3 Modern biomass	15.0%
4 Other uses	18.8%

Source: Derived from FAO Forestry Production and Trade 2024 and IEA World Energy Outlook 2024.

Supply-side dynamics to 2040: balancing availability, constraints and risks

Biomass supply is shaped by multiple pressures, including land-use competition, climate variability, human rights, and requirements for biodiversity protection and social acceptance. Whilst established supply chains mobilise significant volumes today, future growth depends on enabling mechanisms such as standard-setting, certification, traceability, and investment in sustainable production systems.

This section explores the availability, management and mobilisation of suitable feedstocks, land and resource constraints, climate-related risks, and evolving expectations for environmental and social safeguards. All of which will influence the capacity of global biomass supply to meet growing demand sustainably and reliably out to 2040.

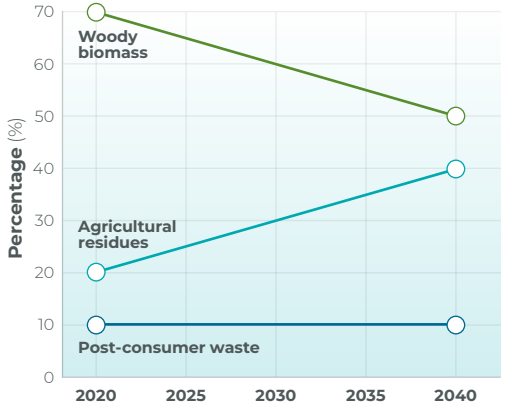
Feedstock availability and composition

Global biomass supply is primarily drawn from forestry and processing operations (harvest and processing residues), post-consumer material (from construction and demolition, pallets, etc), agricultural residues (straw, husks, etc), and to a lesser extent purpose-grown energy crops.

Forestry and sawmill residues remain the dominant feedstock in mature markets such as Europe and North America. These are generally considered sustainable when collected under comprehensive forest management guidelines, as they represent residues that would in many cases be burned without energy recovery.

However, agricultural residues, particularly in Latin America, South Asia and sub-Saharan Africa, could represent an underutilised opportunity. Improved infrastructure, market development and safeguards could unlock untapped value for producers and substantial new supply from these sources, especially in regions with strong cereal production and low current biomass recovery.

Changing composition of biomass feedstocks over time



Source: Derived from IRENA World Energy Transitions Outlook 2023 and 2024.

Timber trends and feedstock implications

A notable trend shaping the external landscape is the projected increase in global timber consumption, which has direct implications for biomass feedstock availability. According to Food and Agriculture Organization of the United Nations (FAO), consumption of primary processed wood products is expected to grow by 37% by 2050, driven by rising demand across construction, packaging, and industrial sectors.

The external landscape: Outlook to 2040 (continued)

This growth is particularly relevant to biomass supply, as increased timber harvesting and processing generate more primary and secondary residues, which can be mobilised as biomass feedstock.

These residues, such as sawdust, offcuts, and bark, are essential inputs for pellet production and other bioenergy applications.

An especially important development is the rapid deployment of engineered wood products, commonly referred to as mass timber. Used increasingly as a substitute for reinforced concrete in multi-storey construction, mass timber offers both carbon storage benefits and a new source of high-quality residues. Whilst long-term projections extend to 2100, the trend is already accelerating and is expected to influence feedstock dynamics well before 2040.

Together, these shifts reinforce the need to monitor timber market developments and ensure that certification frameworks remain responsive to evolving residue streams and sustainability risks.

Land use competition and biodiversity pressures

A core constraint on future supply expansion is land, where biomass production may compete with food production, biodiversity protection, and urbanisation. Increasingly, policies are incorporating spatial safeguards to minimise land-use change and environmental harm.

REDIII prohibits sourcing from areas with high carbon stocks or high biodiversity value. The EUDR mandates full traceability for forest-based commodities and tightens requirements around legality and deforestation.

The Kunming-Montreal Global Biodiversity Framework (2022) reinforces these priorities, influencing national land-use strategies and certification standards. These factors limit the expansion of biomass harvesting in sensitive areas and raise the bar for transparency and sustainability in all sourcing practices.

Regional supply dynamics

North America continues to lead in biomass exports, due to its large forest base, logistics infrastructure and established certification frameworks. However, wildfires, pest outbreaks, and land-use pressures are creating volatility in some regions, particularly western Canada and the southern US.

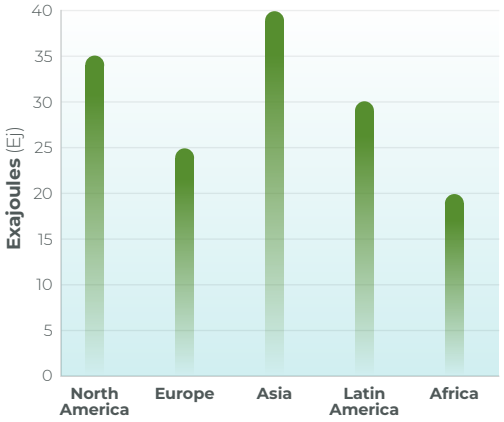
A potential tariff war could significantly disrupt future transatlantic wood pellet trade flows, increasing costs for EU importers and potentially diverting US supply to alternative markets. This may impact price stability and long-term supply security for EU-based biomass users.

Europe has limited potential for additional biomass supply. Forests are already intensively managed, and new constraints under EU Taxonomy and REDIII further restrict harvest volumes, especially in Scandinavia and the Baltics.

Asia, Latin America and sub-Saharan Africa hold significant technical potential, particularly from agricultural residues, plantation sources, and control of invasive species.

However, governance challenges, weak infrastructure and sustainability concerns remain barriers to full supply chain mobilisation.

Estimated regional biomass supply potential by 2040



Source: Derived from IRENA World Energy Transitions Outlook 2023 and 2024.

IRENA projections suggest that global biomass demand across modern applications (electricity, transport, industry and buildings) will reach approximately 89EJ by 2040, driven by increasing use across those sectors. At the same time, global biomass supply potential is estimated to be around 150EJ, distributed across five major regions.

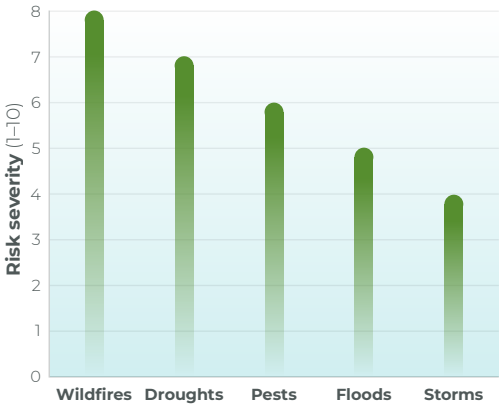
This apparent surplus indicates that, in theory, biomass availability should be sufficient to meet projected demand. However, the critical issue is not just quantity, but responsible sourcing, without compromising biodiversity, land use, or climate goals. To put this in perspective, SBP currently certifies under 20 million tonnes per year, less than 1% of current global demand.

Climate-related risks to biomass availability

The effects of climate change are already evident in biomass supply systems. More intense and frequent wildfires, prolonged droughts, and pest outbreaks are affecting forest health and harvest stability. Climate models project changes in precipitation and growing seasons that will influence forest productivity and biomass yields.

These risks introduce strategic uncertainty and underline the need for adaptive forest management, supply diversification, and improved monitoring and forecasting systems.

Key climate-related risks to biomass availability ranked by severity



Source: Derived from IRENA World Energy Transitions Outlook 2023 and 2024.

The external landscape: Outlook to 2040 (continued)

Unlocking efficiency and innovation

Despite these constraints, significant opportunities exist to improve the efficiency and resilience of biomass supply.

Precision forestry, remote sensing and satellite-based monitoring can optimise harvests and improve forest health. Digital monitoring, reporting and verification tools and risk mapping can support compliance with regulatory regimes such as EUDR. And innovative logistics and processing technologies can help reduce costs and improve the viability of harvesting lower-grade residues.

Investments in these areas will be critical to scaling sustainable biomass supply whilst maintaining public trust and environmental integrity.

Certification as an enabler of sustainable supply

As expectations rise for legal (regulatory and legislatively compliant), sustainable and transparent biomass sourcing, voluntary certification schemes will continue to play a central role in de-risking supply chains, making them resilient and building market confidence. Schemes developed and maintained by organisations such as SBP provide the tools and frameworks needed to assess and effectively mitigate feedstock sourcing risks, demonstrate compliance, and enable traceability from origin to end-use.

By aligning with international policies, supporting geospatial traceability, and embedding continuous improvement, SBP and similar schemes will remain vital to unlocking sustainable biomass potential, across both existing and emerging markets.

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Disclaimer:

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The external landscape: Outlook to 2040 (continued)

Spotlight on the European Union

A global bellwether for sustainable biomass

As the world's largest energy importer and a global leader in climate policy, the European Union (EU) continues to shape the international regulatory environment for sustainable biomass. The EU's evolving legislative framework is not only central to the future of biomass within its borders but also serves as a benchmark for other jurisdictions.

For SBP, understanding and aligning with this framework is essential to maintaining relevance and credibility in an evolving policy landscape.

The 2024–2029 European Commission mandate is marked by a strong emphasis on implementation, competitiveness, and simplification, with a clear focus on security, strategic autonomy, and climate ambition.

Central to this is the amendment of the EU Climate Law, which sets out a 2040 target of a 90% net reduction in greenhouse gas emissions compared to 1990 levels. This target positions bioenergy and carbon removals (including BECCS) as critical components of the EU's Decarbonisation Strategy, albeit within a constrained growth envelope, with impact assessments indicating that the sector cannot expand beyond 9 EJ, up from a current level of 6 EJ.

The revised Renewable Energy Directive (REDIII), alongside the Land Use, Land Use Change and Forestry (LULUCF) Regulation, Deforestation Regulation, and Nature Restoration Law, forms the backbone of the EU's sustainability criteria for biomass. The 2027 review of REDIII will be a pivotal moment, potentially introducing a 2040 renewable energy target and refining the cascading use principle.

These developments will directly influence subsidy eligibility and market access for biomass, reinforcing the need for robust certification schemes such as SBP.

In parallel, the EU is advancing sector-specific initiatives such as the Clean Industrial Deal and the Industrial Decarbonisation Accelerator Act, which aim to create lead markets for low-carbon products, including bio-based chemicals and fuels. These initiatives are expected to introduce sustainability labelling and blending mandates, further embedding sustainability criteria into industrial policy. The EU Bioeconomy Strategy, which was subject to major revision during 2025, will also play a key role in shaping the non-energy uses of biomass, particularly in the chemicals and materials sectors.

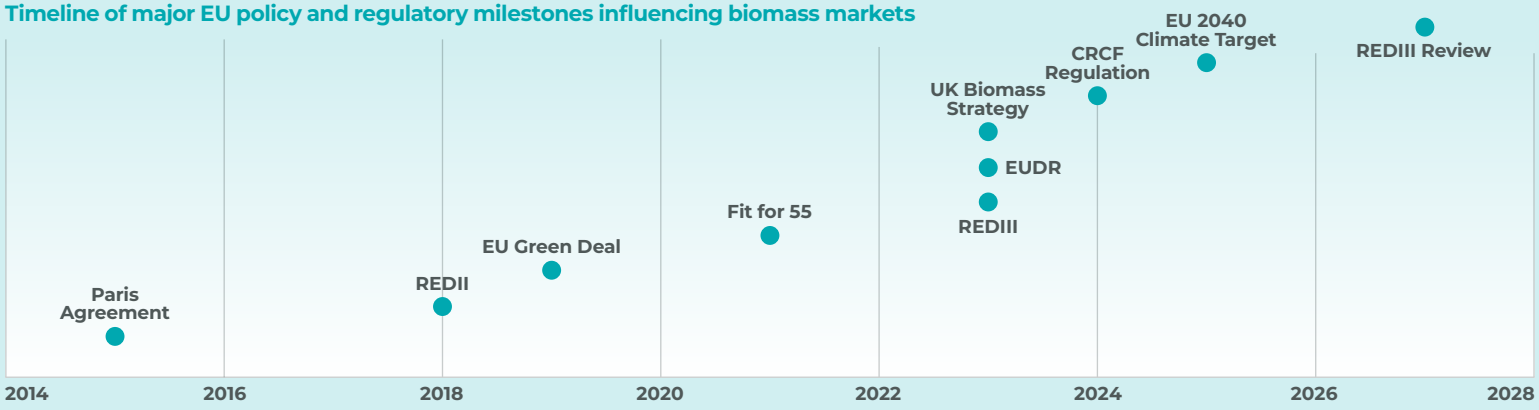
The EU's leadership extends to carbon markets, with proposals to integrate carbon removals into the EU Emissions Trading System (ETS) and the Carbon Removals and Carbon Farming (CRCF) Regulation.

These mechanisms will rely heavily on verifiable sustainability and GHG-related data, positioning SBP to support compliance through its certification infrastructure and data capabilities.

Finally, the EU's regulatory influence is amplified by its role as a global standard-setter. As other countries seek to align with EU sustainability norms, either to access its markets or to replicate its climate leadership, our alignment with EU policy will enhance our global applicability and strategic value.

In this context, we must continue to monitor, engage, and adapt. The EU's legislative agenda is dense and dynamic, but it offers a clear signal: sustainability is no longer optional, it is foundational. Our ability to support Certificate Holders in navigating this landscape, whilst also contributing to evidence-based policymaking, will be key to our positioning as the certification scheme of choice for sourcing sustainable biomass.

Timeline of major EU policy and regulatory milestones influencing biomass markets



Source: Derived from IRENA World Energy Transitions Outlook 2023 and 2024.

The external landscape: Outlook to 2040 (continued)

Strategic opportunities for SBP

As the global bioeconomy accelerates towards decarbonisation, circularity, and sustainability, SBP is uniquely positioned to play a catalytic role in enabling responsible biomass sourcing. The 2026–2030 period presents a pivotal window for us to consolidate our leadership, expand our influence, and deliver measurable impact across climate, biodiversity, and social dimensions.

Together with our interested and impacted parties, we are ready to seize these opportunities and shape a more sustainable, inclusive, and resilient bioeconomy.

Sustainability leadership

Our updated Standards (v2.0) and assurance systems set a high bar for sustainability. With increasing regulatory scrutiny and wider expectations, we can lead by example and demonstrate how voluntary certification can go beyond regulatory compliance to drive real-world outcomes.

Policy alignment and influence

As governments refine their climate and energy policies, we have the opportunity to shape and support implementation through credible data, risk-based tools, and policy engagement. The EU's evolving regulatory framework, in particular, offers a platform for us to reinforce our relevance and contribute to global standard-setting.

Addressing knowledge gaps

We recognise the importance of advancing understanding in key sustainability themes to strengthen assurance and support continuous improvement. We will contribute to addressing knowledge gaps, for example, in regenerative forest capacity, carbon source/sink dynamics, sustainable harvest levels, and ecosystem resilience metrics. Through collaboration with academic networks, civil society, and peer schemes, we aim to support the development of science-based criteria and practical tools that enhance sustainability performance across the biomass value chain.

Market diversification

Emerging markets in Asia, Latin America, and Africa are seeking robust certification frameworks. We can expand our reach into these geographies, share our knowledge and technical support, whilst adapting to regional contexts. Simultaneously, diversification into new feedstocks (for example, agricultural residues) and end-uses (for example, carbon removals, industrial applications, transport fuels, construction, and chemicals) opens new pathways for growth.

Beyond certification

Beyond certification, the data we collect and collate offers significant value to Certificate Holders and interested and impacted parties. Through tailored tools, analytics, and reporting capabilities, we can support due diligence, facilitate compliance with evolving regulatory requirements, and enable alignment with broader sustainability frameworks. As interest in biomass-based carbon removals grows, particularly through BECCS, our systems are well-positioned to provide the assurance and data integrity needed to underpin credible claims and market access.

Engagement and trust

Credibility depends on inclusive governance and meaningful engagement. Our commitment to civil society dialogue, Indigenous rights, and regional representation will strengthen our legitimacy and foster shared ownership of sustainability outcomes.

Data-driven impact

Our digital infrastructure, including the Data Transfer System (DTS) and Audit Portal, provides a foundation for traceability, transparency, and performance reporting. Through developing and implementing our Monitoring, Evaluation and Learning (MEL) system, we will demonstrate our contribution to climate goals and support evidence-based decision-making.

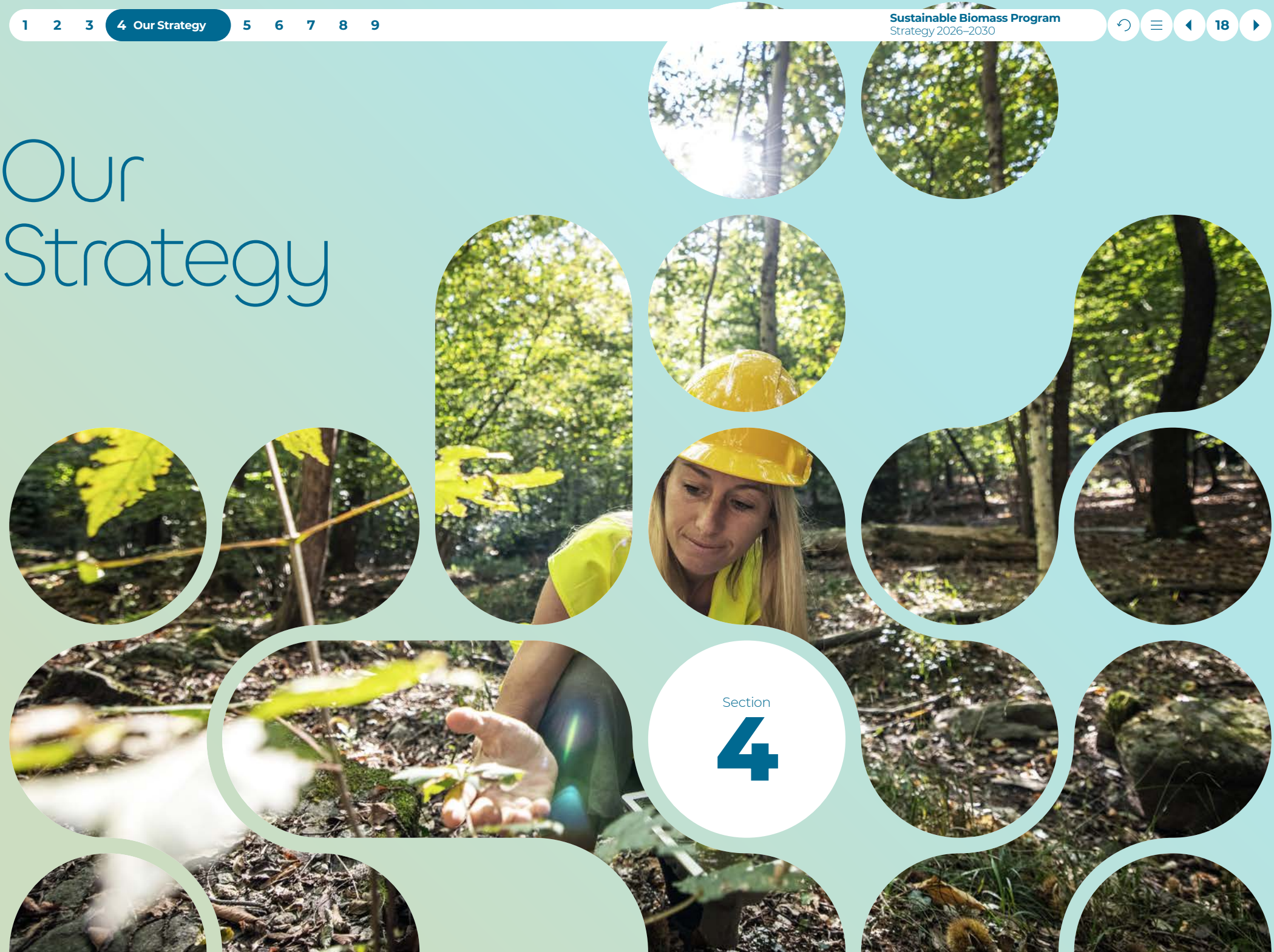
Innovation and collaboration

The next five years offer opportunities to collaborate with peer certification schemes, research institutions, and market actors to co-develop solutions for emerging challenges, such as more responsive and adaptive assurance systems, geospatial monitoring, enhanced biodiversity metrics, and AI-driven risk assessment.

Strategic positioning in the bioeconomy

As biomass becomes integral to the circular bioeconomy, we will strengthen our position as the certification scheme of choice for sustainable biomass sourcing, offering assurance, accountability, and insight across the value chain. We will actively cultivate thought leadership in key subject areas, such as cascading use, carbon removals, and biodiversity metrics, by contributing to research, convening expert dialogue, and sharing insights that shape best practice and policy. We will foster collaboration with peer schemes to promote more integrated and interactive supply chains, enhancing synergies and operational efficiencies.

Our Strategy



Section

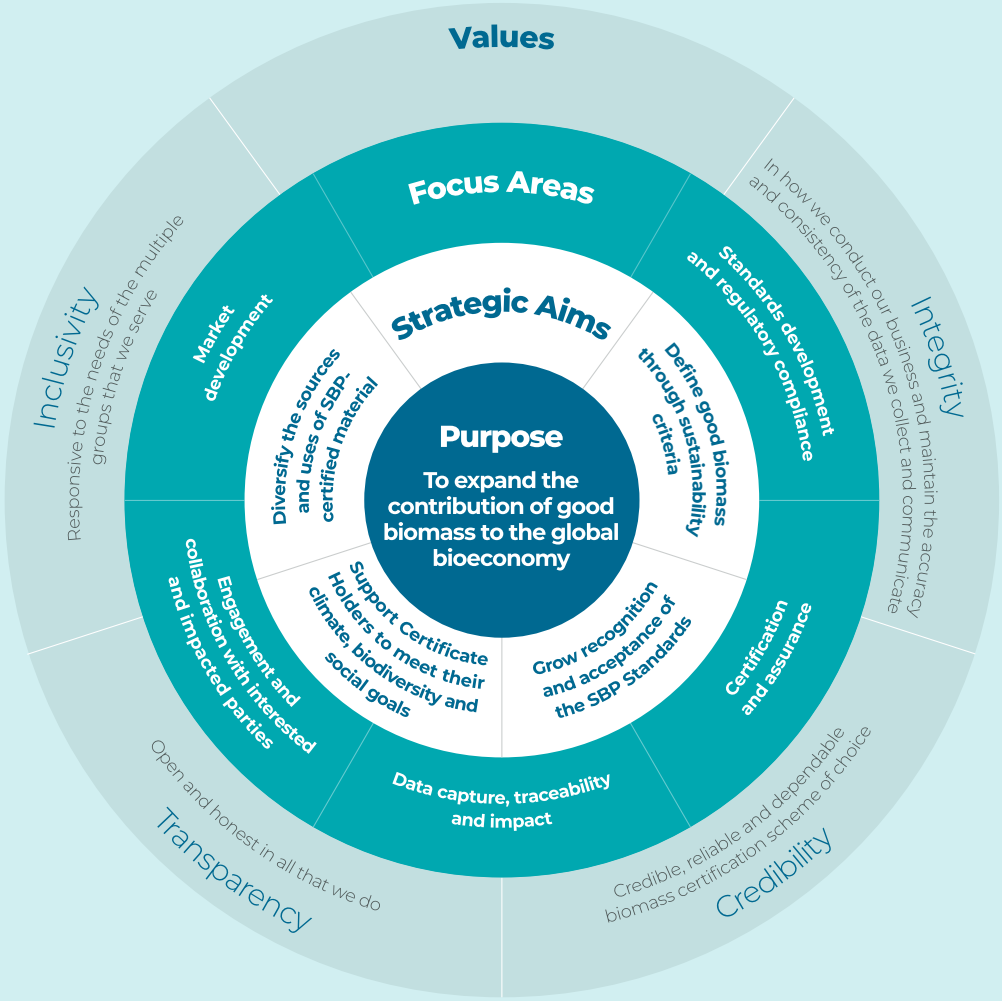
4

Our Strategy

As sustainable biomass continues to play a vital role in the global transition away from fossil fuels and towards to a circular bioeconomy, SBP is committed to leading with integrity, innovation, and impact.

We aim to be the trusted standard for responsible biomass sourcing, supporting the cascading use principle and fostering a sustainable, regenerative system that uses biological resources efficiently and responsibly.

Our Strategy is anchored in our Purpose, supported by four Strategic Aims and five Focus Areas that drive delivery and measurable progress. Our Strategic Aims are guided by a set of core Principles and underpinned by enduring Values, which together shape how SBP operates and delivers impact.



Strategic principles: Foundations of the SBP approach

Our strategic approach is guided by eight core principles. These reflect our commitment to credibility, responsiveness, and leadership in sustainability assurance. Together, they provide a consistent framework for decision-making, engagement, and strategic delivery across the 2026-2030 period.

1 A proactive voice for good biomass

SBP is an independent, knowledge-based voice promoting good biomass. Whilst not a lobbyist or industry advocate, we play a vital role in shaping the conversation around sustainable biomass. We will be assertive and clear in our communications, particularly with regulators, governments, and key interested and impacted parties, to ensure our message is understood and to help influence the development of policy and regulation. This proactive stance reinforces our credibility and supports the broader recognition of good biomass in the global bioeconomy.

2 Beyond regulatory compliance (consensus-led and conditional)

SBP Standards go beyond regulatory requirements, but this is a conditional approach applied where there is consensus and strategic alignment. Our commitment to leadership in sustainability assurance is guided by credibility, feasibility, and broad support, rather than pursued unilaterally. We will identify and communicate where and how SBP currently exceeds compliance, ensuring this added value is clearly understood. Future standards reviews and revisions will balance ambition with commercial viability, maintaining implementability and trust across the sector.

Our Strategy (continued)

3 Global applicability and fungibility

SBP aims to maintain a globally applicable certification scheme, enabling certified biomass to be traded and used across jurisdictions under a single standard. However, we recognise that regional regulatory divergence may challenge full fungibility. Our Strategy will remain adaptive, seeking alignment where possible whilst acknowledging that satisfying all regulatory requirements simultaneously may not always be feasible. We will monitor developments closely and maintain a pragmatic approach to global applicability.

4 Diversification with strategic agility

SBP will respond to emerging demand for certification of new feedstocks, products, and geographies. We do not seek to create markets, but to support responsible growth where there is demonstrable need and alignment with our sustainability criteria. Strategic agility will be key, allowing us to respond to credible opportunities whilst maintaining the integrity and rigour of our certification scheme. Diversification will be guided by external input, risk assessment, and sustainability thresholds.

5 Engagement and inclusivity

Inclusive, transparent engagement with interested and impacted parties is central to SBP's credibility and effectiveness. We will continue to strengthen our engagement model, ensuring diverse voices are heard and reflected in our systems and decisions. This includes civil society, Indigenous Peoples, local communities, regulators, and commercial actors. Our commitment to openness, responsiveness, and respectful dialogue will underpin all interactions and help build shared ownership of sustainability outcomes.

6 Collaboration with other certification schemes

Strategic collaboration with complementary certification schemes will be pursued to enhance credibility, mutual recognition, and operational efficiency. We will actively seek opportunities for joint initiatives, knowledge exchange, and platform sharing. These relationships can amplify our impact, strengthen our reputation, and support the development of more integrated sustainability frameworks across sectors and geographies.

7 Sustainable finance and ESG alignment

SBP recognises the growing role of sustainable finance and ESG-linked investment in shaping market behaviour. Whilst not a developer of financial products, SBP will remain alert to opportunities to support verification and assurance needs in this space. Our certification outputs and data systems can help Certificate Holders demonstrate alignment with ESG criteria, access responsible investment, and meet disclosure obligations. Strategic responsiveness will be key to supporting this evolving landscape.

8 Monitoring, Evaluation and Learning (MEL)

A robust MEL system is essential to track progress, assess impact, and inform continuous improvement. We will develop and implement a MEL system that supports evidence-based decision-making, accountability, and strategic learning. MEL will also underpin our alignment with ISEAL requirements and help demonstrate the value of SBP certification. By identifying knowledge gaps and generating field-based evidence, MEL will strengthen our contribution to sustainability outcomes and support long-term strategic goals.

Our Strategy is anchored in our Purpose, supported by four Strategic Aims and five Focus Areas that drive delivery and measurable progress. Our Strategic Aims are guided by a set of core Principles and underpinned by enduring Values, which together shape how SBP operates and delivers impact.

Our Values shape how SBP operates and delivers impact.

- **Integrity** is reflected in how we conduct our business and maintain the accuracy and consistency of the data we collect and communicate. It underpins our independent assurance system and our commitment to impartiality.
- **Credibility** is earned through rigorous, science-based Standards, ISO-compliant certification, and our reputation as a reliable and dependable biomass certification scheme of choice.
- **Transparency** means being open and honest in all that we do, from publishing our Standards and Regional Risk Assessments (RRAs) to sharing consultation outcomes and supply chain data.
- **Inclusivity** ensures we remain responsive to the needs of the multiple groups we serve, including Certificate Holders, regulators, civil society, Indigenous Peoples, and local communities. Our multi-stakeholder governance model and engagement platforms reflect this commitment.

Throughout the strategy period, we will continue to embed these Values in our systems, communications, and decision-making processes, ensuring they are visible not only in what we say, but in what we do.

We are committed to:

- Driving continuous improvement in sustainability performance across the biomass supply chain.
- Engaging interested and impacted parties to ensure our Standards remain relevant, credible, and responsive to long-term needs.
- Expanding our reach and influence as a globally recognised certification scheme.
- Supporting innovation in data, assurance, and transparency to build trust and accountability.

Our refreshed Strategy for the period 2026–2030 reflects our ambition to be a catalyst for positive change in the global bioeconomy, ensuring that biomass contributes meaningfully to climate goals, biodiversity protection, and social well-being.

Our Theory of Change provides the strategic logic that connects our Purpose, Strategic Aims, Focus Areas, and Key Activities to long-term outcomes and impact. It reflects our commitment to evidence-based decision-making and continuous improvement. The Theory of Change will be updated to align with this Strategy, ensuring that our delivery framework remains coherent, transparent, and outcome-driven. In doing so, it will continue to support SBP's contribution to internationally recognised sustainability frameworks, including the UN Sustainable Development Goals (SDGs), particularly those related to climate action, biodiversity, responsible production, and partnerships.

Our Purpose

Our Purpose in an evolving bioeconomy

SBP supports the transition to a circular bioeconomy by providing a robust framework for the responsible sourcing of biomass. Our Standards uphold the cascading use principle, ensuring that biomass is sourced in a way that prioritises highest-value applications and avoids displacing more efficient or beneficial uses.

At the heart of this ambition is our enduring Purpose:

To expand the contribution of good biomass to the global bioeconomy

Our Purpose reflects both a practical and aspirational role. SBP exists to define, verify, and promote good biomass as set out in SBP Standard 1 (v2.0). This definition, established and accepted as part of the 2023–25 Strategy, remains central to our approach. Good biomass is biomass that is legally and sustainably sourced, and traceable; that respects labour rights, land use and harvesting laws, and upholds traditional and customary rights; that is deforestation-free, safeguards biodiversity by protecting key species, habitats and ecosystems; and that ensures water and soil quality are maintained or enhanced, and carbon stocks are stable or increasing.

In simple terms, good biomass protects forests, ecosystems and communities; bad biomass results in deforestation, biodiversity loss and ecosystem degradation, and falls outside the scope of SBP certification. As a sourcing standard, SBP stands behind good biomass by providing assurance that only feedstock meeting our rigorous sustainability criteria is certified.

SBP's role is threefold:

We set standards that go beyond regulatory compliance, defining a high bar for the sustainable and responsible sourcing of feedstock used in the production of biomass.

We provide the tools and systems that enable auditors to access information and verify compliance with those standards through best practice and ISO-compliant third-party certification and assurance.

We support continuous improvement and transparency through data, engagement with interested and impacted parties, and independent oversight.

Whilst the first point of certification is the pellet mill, our responsibility begins earlier, in the forest or landscape where biomass is sourced. Our risk-based approach addresses both climate-related risks, such as forest carbon stocks and GHG emissions, and nature-related risks, such as biodiversity loss and land conversion. This reflects our commitment to sustainability that is holistic, forward-looking, and responsive to public concerns. We recognise the interdependence of climate and ecological integrity, and our Standards are designed to uphold both.

As markets evolve, so too do expectations of what constitutes sustainability. Through our Standards, assurance system, and data platforms, SBP helps ensure that sustainability is not just a stated ambition but a verified reality.

SBP Standard 1: Defining good biomass

SBP's definition of good biomass is grounded in Standard 1, which sets out four core principles that all certified feedstock must meet:

1. **Principle 1:**
   Legal sourcing
   Biomass must be sourced in full compliance with applicable laws, respecting land rights and trade regulations.

2. **Principle 2:**
   Environmental safeguards
   Sourcing must protect biodiversity, ecosystems, soil, water, and air quality, and avoid conversion of high-value natural areas.

3. **Principle 3:**
   Forest carbon integrity
   Biomass must come from supply bases where forest carbon stocks are stable or increasing, and sourcing must align with international climate commitments.

4. **Principle 4:**
   Social responsibility
   Sourcing must uphold labour rights, benefit local communities, and respect Indigenous and customary land rights.

These principles form the backbone of SBP's sustainability assurance and are central to our Purpose and Strategic Aims.

Our Purpose (continued)

Strategic direction informed by our Purpose

The five-year period 2026–2030 is expected to bring continued evolution in how biomass is understood and governed in the context of sustainability.

Policymakers, supply chain actors, and scientific advisory bodies are increasingly focused on ensuring that biomass used in the bioeconomy meets robust sustainability and traceability requirements. In this context, SBP's Purpose remains highly relevant, offering a trusted framework for defining and demonstrating responsible sourcing.

Our Purpose shapes key aspects of this refreshed Strategy:

A strategic bridge to 2040

Our Strategy does more than chart a five-year work plan. It positions SBP to deliver value and impact into the next decade and beyond.

Our outlook to 2040 shows that the contribution of biomass is expected to rise sharply across multiple sectors, including power, industry, aviation, and construction, and that societal expectations of sustainability will only grow. As biomass markets expand and diversify, the strategic challenge is to ensure this growth is underpinned by robust safeguards, including the protection of environmental integrity and the respect of social justice.

SBP contributes to meeting that challenge by defining and verifying responsible sourcing practices, and by providing the systems, including governance and assurance, that make responsible growth possible. In this context, we see 2026–2030 as a bridge from the consolidation of our revised Standards to the credible diversification of biomass sources and end uses.

This Strategy is not only guided by our Purpose, it is grounded in a clear set of Strategic Aims, operationalised through focused investment priorities, and measured through outcomes that reflect our contribution to the global public good. It also sets the foundation for pursuing the strategic opportunities identified in **Section 3**, ensuring SBP remains responsive to emerging trends and positioned for long-term relevance and impact.

Strategic Aims

Our strategic focus spans climate action, biodiversity protection, and social wellbeing. These dimensions underpin our Strategic Aims and reflect the outcomes we seek to deliver over the next five years. Their integration reinforces the coherence and credibility of our approach.

These aims are a continuation of those set out for the 2023–2025 period, reaffirming their relevance and importance to our Purpose. Together, they express the outcomes we intend to deliver and the contribution we seek to make to the circular bioeconomy. They are aligned with our Theory of Change, and set the direction for our Focus Areas and work programme.

Our four Strategic Aims are:

Define good biomass through sustainability criteria

SBP's first responsibility is to define what constitutes good biomass, and to provide a robust framework for demonstrating compliance with that definition.

Good biomass must be clearly and consistently defined if it is to be recognised, valued, and prioritised over biomass that fails to meet credible sustainability requirements. Our Standards are designed to serve as a reference point for the sector, enabling organisations to identify and manage feedstock sourcing risks and drive continuous improvement across the supply chain.

Our six Standards, together forming the foundation of the SBP certification scheme, set out clear requirements for legal compliance, social responsibility, environmental protection, and the safeguarding of carbon stocks. These requirements were strengthened with the implementation of SBP Standards (v2.0), incorporating up-to-date and material sustainability criteria.

SBP recognises that forest carbon is not an isolated metric, but a core component of healthy, functioning landscapes. Our Standards are designed to safeguard ecosystem integrity, ensuring that forest carbon and biodiversity are considered together as part of a holistic sustainability framework.

Over the 2026–2030 period, we will continue to uphold and promote this definition of good biomass. We will strive to maintain a certification scheme that is robust, credible, and consistently applied, whilst also challenging ourselves to reach higher levels of excellence in collaboration with all interested and impacted parties.

SBP's certification scheme is designed to differentiate good biomass, that is, legally sourced, environmentally responsible, and socially beneficial, from biomass that fails to meet credible sustainability standards. Our growth is guided by this distinction, ensuring that volume is never prioritised over integrity.

Sustainable sourcing of feedstock maintains healthy, functioning ecosystems and supports critical services such as biodiversity, water regulation, soil fertility, and carbon storage. Our certification scheme contributes to these outcomes by ensuring that only biomass meeting robust sustainability criteria is certified. This approach aligns with the latest IPCC and IEA assessments and reinforces our ambition to increase the share of responsibly sourced biomass within the forecast limits of sustainable global availability.

In 2028, we will initiate the next formal standards review cycle. Leading up to and throughout that process, we will ensure that our understanding of good biomass remains informed by the latest scientific evidence, evolving policy frameworks, and the views of our diverse community. This will allow us to refine and strengthen the criteria as appropriate, maintaining SBP's position as a trusted and forward-looking standard-setter.

Our ambition is to keep the SBP Standards aligned with best practice whilst remaining applicable in the real-world contexts where feedstock is sourced.

This includes supporting new feedstocks, such as agricultural residues, energy crops, and agricultural processing residues, without compromising the rigour that underpins our credibility.

As regulation continues to evolve in the EU, UK, Japan and elsewhere, we will ensure our Standards remain relevant, exceed regulatory minimums, and continue to serve as a benchmark for responsible sourcing. Our approach to going beyond regulatory compliance is both aspirational and consensus-led. It reflects our role in setting the benchmark for sustainability assurance, while ensuring that enhancements to our Standards are credible, feasible, and aligned with the expectations of interested and impacted parties. This framing will guide the next standards revision process in 2028, helping to balance leadership with implementability and trust.

The SBP Standards set a high bar for sustainability, and Certificate Holders must demonstrate full compliance to be certified. This includes legal sourcing, environmental protection, social responsibility, and traceability. SBP also plays a strategic role in shaping market behaviour through promoting the uptake of good biomass by setting a high bar, enabling access to responsible markets, and reinforcing best practice across the value chain.

Strategic Aims (continued)

As we expand into new materials and markets, we will not compromise on these principles. SBP certification will remain a mark of credibility, and all Certificate Holders, regardless of feedstock type or geography, must meet the same rigorous requirements. Our commitment to integrity ensures that growth strengthens, rather than dilutes, the SBP brand.

Grow recognition and acceptance of the SBP Standards

This Strategic Aim reflects our ongoing commitment to broadening the recognition, relevance and uptake of the SBP Standards. Certification only creates value if it is recognised and accepted by those who rely on it, for example, regulators, markets, civil society, and End-users. A key priority for SBP is to expand and consolidate this recognition across geographies and end-use sectors.

We will seek to drive further adoption of our Standards by increasing the number and diversity of Certificate Holders, whilst also building understanding and support among other key groups, including policymakers, non-governmental organisations, Indigenous rights representatives, local communities, and financial institutions.

The engagement of both interested and impacted parties is critical to ensuring that the SBP certification scheme remains credible, informed and inclusive.

We will continue to work closely with government authorities, contribute to technical platforms, and engage transparently with Civil Society Organisations. Recognition is an ongoing process of dialogue, demonstration, and responsiveness. By maintaining openness and integrity in our Standards development and assurance processes, we will build the confidence and trust needed for broad-based recognition.

Our role in the biomass sector provides us with valuable insights into how the market functions. The data we collect, including information on feedstock origin and type, as well as energy usage and emissions throughout the supply chain, offers visibility on key topics of public and policy interest. We will use these insights to provide evidence-based support for the responsible sourcing of biomass, helping to inform public debate, regulatory decisions, and sustainability claims.

By strengthening our engagement, contributing constructively to policymaking processes, and continuing to uphold high standards of transparency and rigour, we aim to enhance the value and visibility of our certification scheme and support greater alignment across the bioeconomy.

Support Certificate Holders to meet their climate, biodiversity and social goals

This Strategic Aim reflects a central pillar of our value proposition. Our Certificate Holders operate in a world of increasing scrutiny and expectation around environmental, social and governance (ESG) performance.

They are under growing pressure to demonstrate their contributions to climate mitigation, biodiversity protection, and social responsibility, not just to regulators, but to investors/shareholders, customers, and the public. SBP has a clear and growing role to play in helping them meet these expectations.

We will continue to offer our Certificate Holders a high level of assurance for their operations, through independent scrutiny against our sustainability Standards. Our voluntary certification scheme operates within an internationally recognised framework, aligned with global sustainability standards and best practices, such as the ISEAL Code of Practice for Sustainability Systems (the ISEAL Code). Compliance with our Standards provides third-party validation of actions taken to address climate, biodiversity, and social outcomes.

Just as importantly, our systems enable access to verified, traceable data through tools such as the Data Transfer System (DTS). Certificate Holders can use this data to support both internal management and external reporting, including compliance with evolving regulatory requirements. By ensuring that data is credible and auditable, SBP enhances the transparency and reliability of sustainability claims.

Through instruments such as the SBP Greenhouse Gas (GHG) Calculator, which is under development, and enhanced biodiversity indicators, alongside improved guidance and consistent assurance, we aim to make certification not just a formal requirement but a strategic asset. These tools help organisations monitor performance, demonstrate progress, and support informed decision-making.

We are also investing time and resources to support Certificate Holders in taking concrete and positive actions to enhance the role of biomass in increasing forest carbon stocks and in implementing the cascading use principle. This includes providing practical guidance, data insights, and assurance mechanisms that promote responsible sourcing and efficient biomass use. At the same time, we recognise the importance of ecosystem resilience, and our approach will be guided by the need to balance carbon and resource efficiency with long-term ecological integrity.

We also recognise that certification must evolve to stay relevant. In this strategy period, we will look for opportunities to go beyond certification, by maximising the value of what we already have at our disposal. The data collected through our systems, for example, can provide powerful support for due diligence processes, enabling Certificate Holders to respond to emerging regulatory and market expectations with confidence and credibility.

Our aim is to ensure that the outputs of certification are not only reliable, but also practical and strategically useful, helping Certificate Holders to operate more effectively, communicate more transparently, and plan more sustainably.

In doing so, we aim to ensure that SBP certification is not merely a compliance mechanism, but a platform for practical action and leadership on sustainability.

Strategic Aims (continued)

Diversify the sources and uses of SBP-certified material

This Strategic Aim reflects our commitment to adapt to a changing bioeconomy whilst maintaining the integrity of its certification framework. Over time, we will expand beyond our current focus on woody biomass for energy and the established feedstock source geographies where SBP certification has historically operated.

There are three broad areas of opportunity for diversification. First, new feedstocks, including agricultural residues and other non-woody feedstocks, which offer the potential to optimise the use of renewable bioresources as substitutes for fossil fuels and other carbon-intensive materials. Second, new geographies, both for sourcing feedstock and for the use of biomass, which represent a natural progression for a certification scheme that is globally applicable and sensitive to regional contexts.

Third, new end-use markets, including sectors such as heavy industry, transport, bio-based materials, and carbon removals, where voluntary certification can add value through credible attestation of sustainability performance.

As the bioeconomy evolves, so too must the scope of certification. Whilst SBP's origins lie in woody biomass for large-scale energy production, new biomass products, such as biocarbon, black pellets, biochar, and lignin-derived products, are emerging, alongside a growing range of applications across sectors. These include industrial uses, carbon removals, sustainable construction materials, and the residential heating market. Over the next five years, we will support this diversification in a managed and credible way, ensuring that all new pathways are underpinned by robust sustainability assurance.

Our diversification strategy is not about expanding volume indiscriminately, but about extending sustainability assurance to new feedstocks and markets where there is demonstrable need and clear alignment with our sustainability criteria. Unsustainable biomass will never be within the scope of SBP certification.

All diversification will be guided by robust safeguards, including risk assessments that consider ecological impacts, land use change, and food security. Our Standards uphold the cascading use principle, ensuring that biomass is used efficiently and in alignment with circular bioeconomy goals.

A key priority will be the finalisation and implementation of the non-woody biomass scope extension within our existing certification scheme, ensuring it is ready for both regulatory approval and practical uptake.

At the same time, we will engage with emerging End-users and supply chain actors to understand where else we can offer relevant and credible sustainability assurance. Our focus will remain firmly on responsible sourcing, whilst maintaining the agility to evolve our assurance offerings in response to changes in feedstocks, technologies, and market needs.

This diversification will help ensure that SBP remains relevant, resilient, and responsive to the evolving needs of the global bioeconomy.

SBP is committed to supporting the responsible diversification of certified materials and markets. Whilst we recognise the potential of non-woody biomass, including agricultural residues and energy crops, we acknowledge that demand for certification in these areas is still emerging.

Our priority remains consolidating and strengthening our leadership in woody biomass, where SBP certification is well-established and widely recognised. Any expansion into new feedstocks, uses, or geographies will be pursued selectively, guided by clear sustainability thresholds, risk-based assessments, input from interested and impacted parties, and demonstrable market need. This approach ensures that growth remains aligned with our Purpose, upholds environmental and social safeguards, and contributes meaningfully to climate and biodiversity goals.






Focus Areas

To deliver on our Strategic Aims, we have identified five Focus Areas that define where and how we will prioritise our activity over the strategy period. The Focus Areas are the operational expression of our strategic direction, through which our work programme is structured, our resources aligned, and our performance measured.

Each Focus Area is cross-cutting in nature, contributing to multiple Strategic Aims. Together, they provide the framework for organising our Key Activities and investments in a way that is transparent, coherent, and impact-driven.

The Focus Areas for 2026–2030 have been refined from those set out in our previous Strategy, to better reflect the evolving landscape in which we operate and the lessons learned from the past strategy period. Whilst the overall architecture remains familiar, key adjustments include:

- A clearer separation of standards development from certification and assurance delivery.
- A stronger commitment to impact and learning through data.
- A broader framing of engagement to include interested and impacted parties, whilst continuing to support Certificate Holders and business partners.

Our five Focus Areas are:

Standards development and regulatory compliance

This Focus Area reflects our core role as a standards-setting body, which is central to our contribution to a circular bioeconomy. It defines what responsible sourcing of biomass looks like in practice and ensures our Standards remain clear, credible, and trusted. It also includes the ongoing maintenance and review of our Standards, the development of new scope extensions (such as non-woody biomass), and alignment with evolving regulatory frameworks.

The transition to Standards (v2.0), completed in early November 2025, marked a major milestone in the evolution of our certification scheme. It integrates the latest sustainability criteria into the SBP framework, informed by input from a range of interested and impacted parties, current science, and regulatory developments. In parallel, Regional Risk Assessment (RRAs) were both updated and newly developed throughout 2025, developing clearer guidance on risk and stronger foundations for due diligence and mitigation measures. A total of 16 RRAs were established, covering regions and forest types across nine countries.

As we move through the strategy period, the focus will shift from transition to consolidation, ensuring consistent implementation, resolving interpretation issues, and responding to real-world feedback.

Our Standards must continue to develop alongside the operating context. Our sustainability criteria reflect the interdependence of forest carbon, biodiversity, and ecosystem resilience. By taking a landscape-level view, SBP ensures that sourcing decisions support long-term environmental integrity, not just carbon outcomes. We will actively monitor policy developments, the expectations of interested and impacted parties, and emerging risks and opportunities across geographies and sectors.

As regulatory landscapes evolve and expectations around sustainability deepen, we will ensure that our Standards remain robust, credible, and aligned with best practices. A key part of this commitment involves strengthening the integration of risk-based approaches within our scheme. We will work closely with other certification schemes and sustainability initiatives to harmonise risk assessment methodologies and promote the exchange of risk-related insights. This collaborative approach will help improve the coherence and dependability of risk information used across different schemes and jurisdictions.

As part of our commitment to continuous improvement and global best practice, we will pursue full compliance with the ISEAL Code and aim to become an ISEAL Code Compliant Member by the end of 2026. This milestone will reinforce the credibility of our certification scheme, strengthen our alignment with internationally recognised sustainability frameworks, and support broader recognition in both regulatory and voluntary markets.

This Focus Area also looks ahead to the next full standards review cycle, scheduled to begin in 2028. That process will be aligned with the ISEAL Code, and we will strive to implement the ISEAL Credibility Principles in practice and ensure our Standards remain fit-for-purpose and legally compliant at both national and regional levels.

We are committed to developing our Standards through a transparent and inclusive process. We will actively seek input from interested and impacted parties and carefully consider the experiences of Certificate Holders, shifting expectations on issues such as forest carbon and biodiversity, and advances in science and best practice.

Overall, the review process will be guided by a commitment to continuous improvement, ensuring that changes reflect an evolution rather than a revolution in our approach.

We will ensure our Standards continue to meet the regulatory and legislative requirements of existing markets. Where there is consensus, we will go further, setting standards that go beyond regulatory compliance in meaningful and measurable ways. This commitment is embedded in our approach to governance, environmental integrity, social responsibility, and procedural rigour, driving leadership in sustainability assurance.

This includes ensuring that our Standards continue to uphold social safeguards, such as labour rights, community wellbeing, and Indigenous land rights, alongside environmental and climate criteria.

Focus Areas (continued)

For example, our Standards already incorporate criteria that exceed regulatory requirements and legal minimums on biodiversity protection, land conversion, forest carbon stocks, cascading use, training, grievance handling, and free, prior and informed consent (FPIC).

SBP applies a single, globally consistent certification scheme that sets a high bar for sustainability, regardless of geography or regulatory context. Whilst our Standards are aligned with frameworks such as REDIII, they are not limited to jurisdictions where such regulations apply. This means that SBP-certified material sourced in regions such as Southeast Asia and destined for markets such as Japan is held to the same rigorous sustainability criteria. In doing so, SBP certification helps raise the bar globally, ensuring that responsible sourcing is not defined by local minimums but by internationally credible benchmarks.

Our assurance system is independently managed and ISO-compliant, ensuring impartiality and robustness. Our governance model includes multi-stakeholder representation, promoting transparency and inclusivity.

Over the 2026–2030 strategy period, we will place greater emphasis on this leadership role, articulating where and how SBP goes beyond regulatory compliance, and demonstrating the added value this brings to Certificate Holders, regulators, and civil society. This includes developing new guidance on social justice and enhancing biodiversity metrics to track and report on outcomes that extend beyond regulatory mandates.

A key priority during this strategy period will be maintaining regulatory recognition in key jurisdictions and securing approval for new scope extensions under relevant frameworks.

Our legislative monitoring will cover not only bioenergy and carbon policies but also cross-cutting measures such as the European Deforestation Regulation (EUDR), Corporate Sustainability Due Diligence Directive (CSDDD) and evolving rules on carbon accounting and disclosure. Our approach will be proactive, constructive, and responsive to the needs of regulators, markets, and civil society.

We also recognise the growing demand for credible certification in new geographies where biomass supports national and regional climate goals. We will ensure our Standards are robust and adaptable to new contexts whilst prioritising and continuing to serve established markets.

Ultimately, the credibility and utility of our Standards depend not only on their technical quality but also on their relevance and usability. Our goal is to ensure they are legally robust, contextually appropriate, and adaptable to future needs. Through this Focus Area, we will maintain our position as a respected and practical sustainability reference, supporting implementation, enabling compliance, and driving continuous improvement in responsible biomass sourcing.

Certification and assurance

Independent certification and assurance are fundamental to the rigour and credibility of the SBP certification scheme. This Focus Area covers the design, delivery, and oversight of the mechanisms through which compliance with our Standards is assessed, verified, and trusted.

At the heart of certification lies the assurance that claims of sustainable sourcing are backed by independent, robust, and verifiable evidence. Our credibility depends not only on what our Standards say, but on how they are implemented and verified in practice. For that reason, it is important that our certification and assurance processes are consistently applied across all Certificate Holder types, regardless of geography, scale, or business model. We are committed to maintaining, and where necessary, strengthening, these processes to meet the high expectations of interested and impacted parties.

Our approach is grounded in internationally recognised ISO standards for accreditation and conformity assessment. Independent service providers are responsible for both accreditation and certification. An independent Accreditation Body manages the SBP assurance system in line with ISO 17011, under which Certification Bodies are accredited according to ISO 17065.

Once accredited, these Certification Bodies conduct audits, in line with ISO 19011 and make certification decisions.

SBP is a standard-setter and, following best practice, has no direct involvement in certification decisions, enhancing both the impartiality and robustness of the scheme.

Verification of compliance is essential to the credibility of SBP. To support consistency and rigour in implementation, we will continue to strengthen the infrastructure around assurance, including performance monitoring of Certification Bodies. Regional Risk Assessments (RRAs) are a key part of this infrastructure.

Their primary output is to facilitate implementation of the Standards and access to certification by identifying and clarifying region-specific risks. A secondary output is internal learning, helping us to identify challenges in applying the Standards. Our oversight programme will remain central to this effort, providing mechanisms to identify systemic and temporary issues, target interventions, address non-conformities, and support continuous improvement.

We will also invest in training and capacity building to ensure that auditors, assessors, and Certification Bodies have the knowledge and tools needed to assess conformance reliably. By improving clarity, building skills, and sharing good practices, we aim to reduce the likelihood of error or inconsistency. Additional guidance and tools will be developed to further support integrity, efficiency, and responsiveness.

Certification also plays an enabling role for Certificate Holders. Verified sustainability credentials enhance transparency and accountability across the biomass supply chain.

They help organisations meet due diligence obligations, manage risk, and demonstrate progress toward environmental and social goals. In an increasingly demanding policy and market landscape, certified organisations gain a competitive edge by demonstrating their commitment to responsible sourcing and continuous improvement.

We recognise that the expectations of interested and impacted parties and the assurance landscape are evolving. We will continue to challenge ourselves to improve the accessibility, reliability, and quality of our certification scheme, whilst striving to implement the ISEAL Credibility Principles in practical and meaningful ways.

Focus Areas (continued)

Through this Focus Area, we aim to foster a culture of excellence in certification practice, protecting the integrity of our scheme and supporting better outcomes for people, nature, and the economy. This includes ensuring that our Standards continue to uphold social safeguards, such as labour rights, community wellbeing, and Indigenous land rights, alongside environmental and climate criteria.

In the long term, we believe that high-quality assurance contributes to stronger markets, improved environmental stewardship, and enhanced social responsibility, outcomes that directly support the Sustainable Development Goals and the broader promise of a circular bioeconomy.

Data capture, traceability and impact

Data is fundamental to the credibility, functionality, and value of the SBP certification scheme. Through this Focus Area, we ensure that certified material is traceable, verified, and accompanied by the information needed to assess its sustainability performance.

Over the coming years, we will continue our digital transformation, expanding the capabilities of our systems not only to meet regulatory expectations, but also to improve user experience, strengthen internal assurance and data integrity, and unlock new levels of transparency, and increase the value derived from the information we collect.

Our ambition extends beyond traceability with the aim of building a system where data supports learning, accountability, and measurable impact.

Our core systems, including the Data Transfer System (DTS) and the Audit Portal, form the backbone of our data infrastructure. These tools enable the tracking of certified biomass throughout the supply chain, from supply base to end-use, capturing key attributes such as feedstock type and origin, volumes, energy inputs, and transportation details.

This data underpins all SBP claims, supporting informed and responsible decisions by Biomass Producers, Traders, and End-users. It also helps End-users demonstrate compliance with regulatory and sustainability reporting requirements.

Planned developments include the rollout of the SBP GHG Calculator and the integration of tools to capture new indicators, such as biodiversity, water use, and social performance metrics. These enhancements will support both compliance and value creation, helping Certificate Holders meet reporting obligations whilst showcasing their contributions to climate action, biodiversity protection, and social responsibility.

Emerging technologies will also play an increasingly important role in strengthening system performance and oversight. We recognise the potential of geospatial analysis and artificial intelligence to enhance data use, improve assurance, and reduce administrative burden. Whilst specific applications will be explored and implemented through our Key Activities, our strategic focus is on ensuring that innovation supports robust, evidence-based decision-making and continuous improvement across the SBP scheme.

We recognise the growing importance of ESG frameworks such as the Corporate Sustainability Reporting Directive (CSRD), the Taskforce on Nature-related Financial Disclosures (TNFD), and the Science Based Targets initiative for Forest, Land and Agriculture (SBTi FLAG). Over the strategy period, we will explore alignment opportunities with these frameworks, ensuring that our data systems and certification outputs support credible, science-based disclosures and nature-related risk assessments. This will enhance the strategic value of SBP certification and reinforce our role in enabling responsible biomass sourcing across the ESG landscape.

Our data infrastructure offers significant potential to support Certificate Holders in accessing green finance and sustainability-linked financial instruments. By leveraging verified data, including field-based evidence and traceable supply chain metrics, we can help Certificate Holders demonstrate climate- and nature-positive practices to investors, lenders, and ESG rating agencies.

Over the strategy period, we will explore opportunities to integrate our certification outputs with financial disclosure frameworks and green finance mechanisms. This will reinforce our role as a trusted data provider and enabler of responsible investment, supporting our Strategic Aim to help Certificate Holders meet their climate, biodiversity and social goals.

Our 'beyond certification' agenda leverages verified data to support ESG reporting, green finance, and sustainability-linked disclosures. These services add value for Certificate Holders by enabling alignment with broader sustainability frameworks and facilitating access to responsible investment.

As risk assessment and risk mitigation are central to our value proposition, we are committed to strengthening the quality, consistency, and usability of risk-related data across our systems. A key focus will be on enhancing collaboration with peer sustainability schemes to streamline risk assessment processes and enable the cross-communication of risk data.

This will help improve the reliability and consistency of risk information available to users, supporting more informed and aligned decision-making across a variety of sectors.

Our participation in the Risk Information Alliance[1] marks an important step in this direction. It reflects our commitment to continuous improvement and to building a more integrated and transparent risk landscape. By contributing to shared frameworks and data exchange mechanisms, we aim to ensure that our risk tools are not only robust and credible, but also strategically valuable for Certificate Holders and our wider community.

Supporting licence fees, IT infrastructure, and the development of smart digital tools will entail considerable investment. These investments are designed not only to ensure system integrity and regulatory alignment, but also to support efficient compliance management and improve usability for Certificate Holders.

By continuously enhancing our digital systems, we aim to deliver practical value, reduce administrative burden, and enable more effective data-driven decision-making across the biomass supply chain.

An Important component of this Focus Area is the development of a comprehensive Monitoring, Evaluation, and Learning (MEL) system.

[1] The Risk Information Alliance benefits from the award of a grant under the ISEAL Innovations Fund, which receives generous support from principal donor, the Swiss State Secretariat for Economic Affairs (SECO).

Focus Areas (continued)

MEL will serve as the mechanism through which we assess our own effectiveness, identify areas for improvement, and adapt our approach based on evidence. It will allow us to track the performance of our scheme over time, evaluate progress toward strategic outcomes, and generate insights to inform future standard-setting and assurance practices. Through MEL, we will create feedback loops that connect data to decision-making, both within SBP and across the wider system.

This includes generating field-based evidence to assess the robustness of SBP Standards and Regional Risk Assessments (RRAs), helping to validate our risk-based approach and demonstrate the effectiveness of our certification scheme in diverse sourcing contexts.

We aim to publicly report annually on key metrics, including greenhouse gas data, and to build a consistent time series of credible information that can be used to assess progress against climate goals. Achieving this will require iterative improvements to our Standards and consistent application across multiple review cycles.

The impact of this work is far-reaching. Verified data enables transparency and builds trust among policymakers, regulators, and civil society. Over time, it will allow us to quantify our contribution to climate goals, biodiversity outcomes, and responsible sourcing. Through regular performance reporting, we will provide interested and impacted parties with a clearer picture of how SBP-certified biomass is sourced, what risks are being managed, and where improvements are being made.

By making evidence-based insights more visible and accessible, we will support more informed debate and better decision-making about the role of sustainably sourced biomass in the global bioeconomy. Through our data systems and partnerships, we aim to generate insights that position us as a thought leader in emerging areas of sustainability performance, including cascading use, lifecycle carbon accounting, and biodiversity impact measurement.

By unlocking the full potential of our information systems, we will not only demonstrate impact but we will enable it, empowering interested and impacted parties, supporting compliance, and driving more sustainable choices throughout the biomass supply chain.

Our 'beyond certification' agenda builds on the value of our data systems to deliver broader sustainability benefits. Over the strategy period, we will develop tailored tools and insights that support due diligence, regulatory compliance, and sustainability reporting.

This includes risk-screening dashboards, voluntary reporting modules aligned with frameworks such as EUDR and others as relevant, and sector-level insights on biodiversity and carbon stocks. These services will benefit Certificate Holders, regulators, and civil society by enhancing transparency, reducing compliance burdens, and enabling more informed decision-making. Our role will be to convene, translate, and deliver insights that extend the value of certification into wider sustainability systems.

Engagement and collaboration with interested and impacted parties

As a non-membership organisation, we are committed to fostering inclusive and transparent engagement and collaboration with all interested and impacted parties. Credible certification depends on open dialogue and inclusive governance.

Our engagement is multi-layered, operating at local, national, and global levels, and integrated into routine activities such as Regional Risk Assessments (RRAs), Standards reviews, and assurance processes. This ensures that diverse perspectives are reflected not only in our governance and decision-making, but also in the day-to-day implementation of our certification scheme.

This Focus Area outlines our approach to engaging and collaborating with the full range of individuals, communities, and organisations who shape, or are affected by, the SBP certification scheme.

We use the term interested and impacted parties to reflect this diversity. It includes rights holders, such as Indigenous Peoples and First Nations, landowners, and local communities with legal, traditional, or customary rights, and stakeholders with a professional or institutional interest, including Certificate Holders, regulators, policymakers, researchers, and Civil Society Organisations.

Our strength lies not only in what we do, but in how we do it, with transparency, inclusivity, and shared responsibility.

Through more meaningful engagement that supports consensus building, we aim to enhance the relevance, credibility, and impact of SBP across the biomass supply chain.

Our multi-stakeholder model brings together diverse perspectives, from Biomass Producers and End-users to Civil Society Organisations and technical experts. Whilst commercial stakeholders remain essential, we are equally committed to engaging those who bring independent scrutiny, local knowledge, and rights-based perspectives.

As we enter the 2026–2030 strategy period, we will place continued emphasis on:

- Regional engagement, recognising the diversity of local contexts.
- Strengthening dialogue with Civil Society Organisations.
- Expanding our presence in emerging markets.
- Creating new pathways for participation and feedback.

We will continue to seek input from Certificate Holders, trusted partners, our Accreditation Body, and Certification Bodies. We will invest more time and resources into proactive, respectful, and constructive engagement with rights holders and non-commercial stakeholders across geographies.

Our engagement with initiatives such as the Risk Information Alliance reflects our proactive stance on aligning with emerging regulatory requirements and enhancing the effectiveness of our Standards. By contributing to shared platforms, we aim to ensure that our risk framework supports both compliance and continuous improvement, whilst remaining responsive to the needs of Certificate Holders and regulators alike.

Focus Areas (continued)

As part of this commitment, we recognise the need to respond constructively to external scrutiny, including criticism from civil society actors. To ensure our engagement remains effective and principled, the stakeholder engagement plan will be revisited and strengthened. This will include protocols for correcting misinformation when SBP is named and ensuring our engagement reflects inclusivity and openness, welcoming diverse perspectives and fostering respectful dialogue with all interested and impacted parties. It will also include examples of successful outreach that have improved civil society relationships.

We will also define and communicate clear parameters for engagement, recognising that meaningful dialogue requires mutual willingness to participate. These refinements reflect our commitment to transparency, realism, and continuous improvement, and will help reinforce the credibility of the SBP certification scheme in a dynamic and sometimes contested landscape.

By expanding our partnerships and networks, we aim to foster shared ownership of sustainability challenges and unlock opportunities for joint action, from research and regeneration projects to targeted capacity building.

We will also strengthen our value proposition for civil society actors by:

- Creating clearer opportunities for input and influence.
- Providing more accessible information about our certification scheme and impacts.
- Launching a dedicated programme of relationship-building that respects different ways of working, mandates, and resource constraints.

Introduced as part of our Strategy for 2023–2025, our Regional Forums have been a key platform for discussion, allowing all parties to share insights, raise concerns, and collaborate on emerging issues. We will continue to evolve our approach to facilitate meaningful and constructive dialogue. In parallel, we will launch a Stakeholder Hub, a digital space for knowledge exchange, co-creation, and peer learning. Our approach will be grounded in respect, responsiveness, and transparency, ensuring that different voices are heard and decisions are well-informed.

SBP also plays an important role in supporting policy dialogue. We will increase our engagement with policymakers and regulators, offering the perspective of an independent certification scheme, sharing insights and data, and contributing to the development of effective sustainability frameworks.

During our Standards review cycle, we will implement a broad and inclusive engagement model. We are committed to consensus building, which will mean enhancing consultation and participation mechanisms, and ensuring that the voices of affected communities, Indigenous Peoples, and other marginalised groups are reflected in our systems and decisions. These principles will continue to shape our governance, engagement protocols, and communications.

We will also pursue collaborations in applied research, knowledge exchange, and capacity building, guided by openness, clarity of purpose, and a shared commitment to impact.

For example, through collaboration with peer certification schemes, we aim to build appropriate recognition pathways, such as benchmarking, that enhance interoperability, reduce duplication, and strengthen sustainability assurance across sectors.

This reflects our strategic commitment to innovation and collaboration, and our ambition to contribute to a more integrated and effective sustainability landscape.

These efforts include opportunities to revisit earlier commitments, such as research on sustainable harvesting levels across geographies and regeneration projects to improve forest quality. These initiatives reflect our ambition to evolve into a more proactive certification scheme, contributing to landscape-level sustainability outcomes and reinforcing the credibility of SBP-certified biomass.

We will strengthen our role as a thought leader by contributing to the development of subject matter expertise in areas such as cascading use, biodiversity metrics, and carbon accounting, helping to shape the broader sustainability discourse.

To support this, we will implement a clear, consistent, multi-channel communications strategy, one that builds trust, raises awareness, and encourages wider participation in certification and sustainability efforts.

The outcome of this work is not just broader engagement, but deeper collaboration. Through inclusive dialogue and mutual respect, we aim to build a culture of collective responsibility, where all parties feel empowered, informed, and invested in the outcomes. This approach will enhance the credibility and relevance of our work. Input from interested and impacted parties improves decision-making, reflects lived experience, and helps us adapt to a dynamic global landscape.

In the long term, this Focus Area contributes to social equity, community empowerment, environmental stewardship, and the development of inclusive, participatory processes that strengthen both our certification scheme and the broader sustainability goals we support.

Market development

This Focus Area reflects our commitment to maintaining and expanding the relevance of SBP certification in a rapidly evolving bioeconomy. Our role is not only to uphold high standards of sustainability, but also to support the responsible growth of markets where those standards matter.

We will continue to enable market access for SBP-certified material by strengthening recognition in established markets and exploring opportunities in new geographies, feedstocks, and end-uses.

In the period 2026–2030, we will implement a targeted programme of market research and engagement to identify and assess opportunities for diversification. This includes analysing demand trends, supply chain preferences, regulatory developments, and emerging sustainability priorities. Our approach will be informed by the needs of Certificate Holders, policymakers, and other interested and impacted parties.

Whilst we support international consistency and fungibility of certified biomass, we recognise the importance of regional realities and commercial viability.

Focus Areas (continued)

Our approach to diversification will remain adaptive, ensuring that new feedstocks, geographies, and end-uses are pursued selectively and responsibly, in alignment with local contexts and sustainability thresholds.

In the woody biomass for energy sector, we will continue to pursue geographic expansion. Asia remains a priority, particularly Japan, South Korea, and Vietnam. Demand in Japan and South Korea is expected to grow significantly as coal is phased out and sustainability requirements tighten. We will support uptake in these jurisdictions, ensuring our scheme remains globally applicable and regionally relevant.

At the same time, we will explore the potential of new feedstocks, such as agricultural residues and energy crops. These may become increasingly important as regulation evolves, domestic sourcing is prioritised, and demand for sustainable materials grows. We will complete and implement our non-woody biomass scope extension and consider further adaptations, where justified by risk and market need.

We also recognise the growing importance of carbon removals, including BECCS. As these technologies scale, robust certification of feedstock sustainability and carbon data will be essential. SBP is well positioned to contribute to the integrity of these systems, using our frameworks to provide credible assurance and verified supply chain data.

Beyond energy, we see potential in emerging end-use markets such as:

- Industrial applications and hard-to-abate sectors (for example, biocarbon, black pellets, etc).
- Transport fuels (for example, SAF and marine fuels).
- Bio-based construction materials and chemicals.

These markets require assurance that biomass is sustainably sourced and traceable. We will assess where certification can unlock value whilst maintaining rigour.

This includes ensuring that certification supports biodiversity conservation and equitable outcomes for communities involved in biomass production and use.

As biomass becomes more attractive to energy-intensive industries seeking to decarbonise through reducing their fossil fuel dependency, we will explore how our tools can support informed decision-making. Our systems offer a practical, scalable solution that can adapt to new regulatory and market demands.

A key part of our market development strategy is helping organisations navigate complex regulatory environments. Our data infrastructure and assurance systems can support compliance and due diligence, whilst our neutrality and experience position us to contribute meaningfully to policy discussions and standard-setting.

We will support these efforts with strategic communications that build understanding of SBP certification, its environmental and social benefits, and the trust it offers to market actors. Differentiating certified from non-certified biomass can strengthen brand value and incentivise broader adoption of sustainability practices.

As new markets emerge, driven by Biomass Producers, End-users, or investors, they will need to embed responsible sourcing from the outset. We will evolve in step with these developments, ensuring our certification scheme remains robust, responsive, and relevant.

As we explore new markets and feedstocks, we will apply the same rigorous sustainability thresholds that underpin our existing scheme.

This includes assessing potential impacts on ecosystems, food systems, and resource efficiency, and ensuring alignment with the cascading use principle.

The outcomes we seek are clear:

- Increased availability, visibility, and uptake of SBP-certified biomass.
- New pathways for certification where sustainability assurance is needed.
- Broader relevance of our scheme across the global bioeconomy.

Over time, this contributes to systemic impact: more resilient and diversified supply chains, expanded economic opportunity, and greater climate and biodiversity benefits. Certification becomes not just a passport to market access, but a strategic asset, supporting social equity, rural development, and the long-term success of the biomass transition. For Certificate Holders, particularly those operating in core geographies, this means continued recognition of their role in driving responsible sourcing and access to evolving markets that value sustainability and credibility.

How our Focus Areas support our Strategic Aims

The relationship between Focus Areas and Strategic Aims is not one-to-one. Each Focus Area contributes to multiple Aims, and each Aim is supported by several Focus Areas. The matrix below illustrates this alignment:

Focus Area	Strategic Aim: Define good biomass through sustainability criteria	Grow recognition and acceptance of the SBP Standards	Support Certificate Holders to meet their climate, biodiversity and social goals	Diversify the sources and uses of SBP-certified material
Standards development and regulatory compliance	●	●	●	●
Certification and assurance	●	●	●	
Data capture, traceability and impact		●	●	
Engagement and collaboration with interested and impacted parties		●	●	●
Market development		●		●

Key Activities

Delivering our Strategy requires focused and coordinated effort. To turn Strategic Aims into tangible outcomes, we will implement this Strategy through a rolling work programme, reviewed and updated annually.

This approach allows us to remain responsive to new developments whilst maintaining a strong sense of direction and accountability.

The work programme translates our Focus Areas into practical action, defining what we will do each year to maintain relevance, build value for interested and impacted parties, and contribute to a circular bioeconomy. Each activity will be prioritised and resourced based on strategic need, opportunity, and capacity.

Activities are not ends in themselves. Each one contributes to an impact pathway, grounded in our Theory of Change: Inputs (for example, resources, partnerships, systems) enable Outputs (for example, guidance, tools, updated systems), which deliver Outcomes (for example, improved practice, compliance, transparency), contributing ultimately to Impact (for example, responsible sourcing, policy alignment, climate and biodiversity goals).

In practice, this means that every Key Activity will be connected to at least one Strategic Aim and linked to a measurable benefit, whether for our Certificate Holders, regulators, the biomass sector more broadly, or society at large.

This structure provides the discipline to deliver our Strategy whilst leaving room for flexibility and innovation. By combining annual planning with long-term outcomes, we can focus effort where it matters most, measure progress meaningfully, and demonstrate our contribution to the broader goals of responsible sourcing, climate ambition, and social equity.

The table on page 33 outlines indicative Key Activities under each Focus Area. These are not exhaustive but reflect the scale and ambition of our delivery plan.

Operationalising the Strategy

To ensure our Strategic Aims are translated into meaningful progress, we will operationalise this Strategy through a structured annual cycle of planning, delivery, and review. Each year, we will:

- Develop an annual work plan: This plan will define specific activities under each Focus Area, aligned with Strategic Aims and informed by external input, emerging trends, and internal priorities.
- Allocate resources: Activities will be prioritised based on strategic relevance, potential impact, and organisational capacity, ensuring efficient use of resources.
- Define outputs and outcomes: For each activity, we will identify expected outputs (for example, guidance, system updates, etc) and intended outcomes (for example, improved practice, increased transparency, etc), linked to our Theory of Change.
- Monitor and evaluate progress: We will track delivery against milestones and indicators, adjusting course as needed to remain responsive and effective.
- Report and communicate: Progress and learnings will be shared transparently with all interested and impacted parties through annual reporting and engagement, demonstrating our contribution to responsible sourcing, climate ambition, and social equity.

Key Activities (continued)

Key Activities by Focus Area

Focus Area	Key Activities	
1 **Standards development and regulatory compliance** Ensuring our Standards remain robust, credible, and aligned with evolving regulatory frameworks.	– Identify and communicate where SBP Standards go beyond regulatory requirements, and promote through targeted messaging – Maintain compliance with key jurisdictions (for example, EU, DK, NL, UK, JP, VN) – Monitor implementation of SBP Standards (v2.0) – Strengthen thought leadership on enhancing forest carbon stocks and ecosystem resilience – Launch non-woody biomass scope extension	– Develop new guidance to support social justice – Monitor emerging legislation/regulations (for example, EUDR, CRCF, CSDDD/CSRD, GCD, etc) – Achieve ISEAL Code Compliance Member status – Initiate standards review process, achieve Board endorsement and launch of Standards (v3.0)
2 **Certification and assurance** Enhancing the credibility and consistency of our systems to build trust and ensure robust, high-quality certification outcomes.	– Expand availability of Regional Risk Assessments to new regions – Onboard new Certification Bodies and support global availability of auditors – Expand auditor training and calibration	– Improve performance monitoring of Certification Bodies and Peer Reviewers – Strengthen auditor guidance and decision-making tools – Strengthen risk-based approach in assurance monitoring
3 **Data capture, traceability and impact** Leveraging technology and data to improve transparency, demonstrate impact, and support informed decision-making across the biomass value chain.	– Enhance IT tools to support data integrity and transparency – Develop and rollout the SBP GHG Calculator – Develop biodiversity and social performance metrics – Implement Monitoring, Evaluation and Learning system – Expand the use of the Audit Portal to automate additional processes	– Explore voluntary modules to enable data reporting for broader regulatory frameworks (for example, CRCF, CSDDD/CSRD, GCD, etc) – Explore alignment with ESG frameworks (for example, CSRD, TNFD, SBTi FLAG, etc) to support Certificate Holders' reporting and disclosure obligations
4 **Engagement and collaboration with interested and impacted parties** Strengthening relationships to ensure our scheme remains inclusive, responsive, and aligned with shared sustainability goals.	– Develop and implement a strategic communications plan to articulate our value proposition, and promote our role as the scheme of choice for biomass certification – Update stakeholder engagement plan to address misinformation and define engagement boundaries – Convene Regional Forums (Asia, Americas, Europe) – Strengthen engagement with civil society and rights holders – Strengthen our role as a thought leader by identifying and addressing emerging sustainability topics – Improve feedback mechanisms	– Develop targeted outreach with policymakers and regulators – Participate in industry platforms and key global conferences (for example, Argus, CMT, USIPA, WPAC, etc) – Strengthen collaboration with other voluntary certification schemes, civil society, and academic networks – Participation in Risk Information Alliance
5 **Market development** Expanding our relevance and recognition across new geographies, biomass types, and end-use markets to support a growing circular bioeconomy.	– Continue to support SBP uptake in new geographies – Expand SBP's relevance to new biomass products (for example, non-woody biomass) – Expand SBP's relevance to new end-use markets (for example, heavy industry, industrial applications, transport fuels, construction, and chemicals) – Engage with downstream market leaders (for example, apparel retailers, FMCGs, cement and steel operators)	– Our Theory of Change will be updated to align with this Strategy, ensuring that our delivery framework remains coherent, transparent, and outcome-driven – Utilise residues streams (from palm oil, soy, sugar, etc production) and voluntary certification scheme collaboration – Support recognition and uptake in new markets and sectors (for example, BECCS, CRCF, etc)

Performance Indicators

Section
5

Performance Indicators

To ensure transparency, accountability, and continuous improvement, we will track progress against our Strategy through a structured set of Performance Indicators. These Indicators will help us assess whether our activities are delivering the intended outcomes and contributing to our long-term goals.

The 2026–2030 Indicators reflect a strategic shift from foundational growth to system maturity and impact. Whilst the 2023 to 2025 Indicators focused on scale, such as certified volumes and market reach, the new Indicators prioritise assurance quality, regulatory influence, and credibility.

We have moved from tracking outputs to measuring outcomes, with Indicators that assess system performance, engagement effectiveness, and innovation. This includes new metrics on IT system uptime, complaint resolution, and adoption of voluntary modules.

The updated Indicators also reflect our growing role in informing the biomass debate, expanding into new sectors, and ensuring inclusive engagement. This evolution ensures our performance framework remains aligned with our Purpose and responsive to a dynamic bioeconomy.

Our performance framework is built around the following principles:

- **Alignment with Strategic Aims:** Each Indicator is linked to one or more of the Strategic Aims and Focus Areas, ensuring that measurement supports delivery.
- **Outcome-oriented:** We focus not only on activity completion but also on the quality, effectiveness, and impact of our work.
- **Relevance:** Indicators are designed to reflect the interests and expectations of interested and impacted parties, including Certificate Holders, regulators, civil society, and the broader biomass sector.
- **Adaptability:** The Indicator set will evolve over time to reflect new priorities, data availability, and learning from implementation.

We will monitor performance across four levels:

1. **Inputs:** Resources, partnerships, and systems mobilised to support delivery.
2. **Outputs:** Tangible products and services delivered (for example, revised Standards, tools, guidance, etc).
3. **Outcomes:** Changes in behaviour, practice, or system performance (for example, improved compliance, engagement, etc).
4. **Impact:** Long-term contributions to responsible sourcing, climate goals, and social equity.

Progress will be reported through:

- Annual Reviews.
- Monitoring, Evaluation and Learning (MEL) system dashboards.
- Regional Forums.

This approach enables us to demonstrate value, learn from experience, and adapt our Strategy to remain effective and relevant in an evolving bioeconomy.

The table on page 36 presents a set of Performance Indicators aligned with each of our five Focus Areas. Each Focus Area supports one or more Strategic Aims, and the Indicators are selected to reflect that alignment, ensuring that performance measurement is directly tied to strategic delivery.

The Indicators are designed to track progress across inputs, outputs, and outcomes, providing a clear line of sight from activity to impact. Each Indicator is paired with a realistic target, either annual or by the end of a given year, to support accountability, learning, and continuous improvement.

Whilst the Indicators presented here are strategic in nature, they will be complemented by a more detailed Monitoring, Evaluation and Learning (MEL) system currently under development. The MEL system will include additional Indicators that support operational learning, adaptive management, and continuous improvement. Together, the Strategy and MEL frameworks form a coherent performance architecture, ensuring that both high-level outcomes and day-to-day effectiveness are measured, understood, and improved over time.

Performance Indicators (continued)

Performance Indicators for 2026-2030

Focus Area		Indicator	Type	Target
Focus Area	Standards development and regulatory compliance	**Recognition of SBP Standards going beyond regulatory compliance** (% via survey)	Output	≥70% by 2030
		Key jurisdictions where SBP maintains regulatory recognition (%)	Outcome	100% annually
		Timeliness of standards review and Standards (v3.0) delivery milestones (%)	Output	100% met on schedule
		Achieve ISEAL Code Compliant Member status and maintain full alignment with the ISEAL Code	Outcome	Achieve by end 2026 and maintain
		Priority regulatory frameworks actively tracked and addressed through integration in work plans (#)	Input	Within 12 months of a decision
	Certification and assurance	**Auditor training sessions delivered** (#)	Output	≥4 per year
		Certification Bodies meeting performance benchmarks (%)	Outcome	≥90% annually
		Stakeholder confidence in assurance and certification systems (% via survey)	Outcome	≥85% positive response by 2027 and maintained
		Average time to resolve incidents or complaints (#)	Outcome	≤60 days on average
	Data capture, traceability and impact	**Certificate Holders using SBP GHG Calculator** (%)	Output	≥25% of eligible Certificate Holders by 2027 and maintained
		Monitoring, Evaluation and Learning system framework developed, approved, and operationalised	Output	Fully operational by end of 2026
		Functionality uptime of IT systems (for example, DTS and Audit Portal) (%)	Input	≥99% uptime annually
		Adoption of voluntary modules (for example, EUDR) **by Certificate Holders** (%)	Outcome	≥50% of eligible Certificate Holders by 2028
	Engagement and collaboration with interested and impacted parties	**Recognition of SBP as the preferred certification scheme for biomass sourcing** (% via survey)	Output	≥75% by 2030
		Regional Forums held (#)	Output	≥2 per year
		Stakeholder satisfaction with engagement processes (% via survey)	Outcome	≥85% satisfaction by 2027 and maintained
		Balance of representation in engagement activities (ratio commercial:non-commercial)	Output	50:50 by 2030
		Thought leadership outputs published (for example, working papers, technical briefs, case studies, etc)	Output	≥2 per year
		Policy/regulatory consultations responded to (#)	Output	≥10 per year
	Market development	**Share of SBP-certified biomass used in priority markets** (%)	Outcome	Maintain at ≥75% in established markets (Europe) 2026–2030; grow to ≥20% in emerging/new markets (Asia) by 2030
		Growth in active Certificate Holders in Asia (%)	Outcome	≥20% growth by 2030
		New feedstock types included in SBP scope (for example, non-woody biomass) (#)	Output	≥3 new types by 2028
		Uptake of SBP in new end-use sectors (for example, BECCS, transport fuels, etc) (#)	Outcome	≥3 sectors by 2030
		Formal collaboration initiatives launched or maintained with voluntary certification schemes or market actors (#)	Output	≥5 active initiatives by 2030

Organisation

We recognise the critical role of sound governance in driving sustainable success. Our governance, oversight, and advisory arrangements provide clear strategic direction, effective supervision, and strong control mechanisms, ensuring responsible management, balanced decision-making, and long-term resilience. These structures are robust and well-positioned to support SBP's strategic development and growth over the next five years.

More information on our governance arrangements is available here

We are committed to the continuous improvement of our oversight processes, recognising this as essential to maintaining and strengthening the trust that underpins our credibility and long-term success. We remain attentive to the capabilities, skills, and expertise required across our management and operational structure and actively seek enthusiastic and experienced individuals who can make a positive impact and play a vital role in shaping the future of SBP. We will continue to invest the time and resources needed to ensure the highest quality of participation is sustained.

This includes ensuring that our committees, working groups, and processes where specialist input is necessary reflect a balanced mix of expertise.

By embedding diverse and relevant expertise in these structures, we aim to support high-quality insights, strengthen the credibility of our decision-making, and reinforce our commitment to inclusive and evidence-based governance.

Looking ahead, and in line with the strategic needs of SBP as an organisation, we will ensure that our governance and operational capacity evolve to support delivery of our Strategic Aims and Focus Areas. This includes maintaining a high-performing team, strengthening leadership, and ensuring our systems and structures remain fit-for-purpose in an expanding bioeconomy.

Out to 2030, we plan to expand our core team by bringing in new capabilities, particularly in policy, agricultural standards, monitoring, evaluation and learning, and regional representation.

And supplement existing expertise in IT, training, risk assessments, and communications. We will continue to use external providers where beneficial and cost-effective, especially in areas such as finance, legal, and specialist technical services.

In addition, we recognise the importance of building specialist capacities to ensure SBP remains equipped to deliver on its Strategic Aims and uphold the credibility expected of a sustainability certification scheme. As a small organisation, we address capacity gaps through a combination of approaches: recruiting qualified staff, engaging retainer consultants, and contracting expert consultants for specific assignments. This flexible model allows us to respond effectively to evolving strategic needs without committing to permanent in-house roles where not appropriate.

Section
6

Finance and funding

Section **7**

SBP is a not-for-profit organisation. All income is reinvested to deliver value for Certificate Holders and the wider community. The Strategy will be implemented within the constraints of our financial model, which is currently based on certification fees. We aim to ensure continuity of operations and delivery of strategic projects, whilst maintaining flexibility to respond to market changes.

We begin the 2026–2030 period from a sound financial position, with stable income, appropriate reserves, and no external debt. Our cost structure allows us to manage volatility and adapt expenditure as needed.

To prepare for the next standards review cycle commencing in 2028, we have established a designated fund. Given our not-for-profit status, this ringfenced reserve will be built up gradually through the allocation of excess income above annual expenditure to ensure we can deliver SBP Standards (v3.0) and associated frameworks without placing pressure on annual budgets.

We will continue to monitor economic conditions and explore opportunities to diversify income in support of strategic priorities.

Risk management

Delivering our Strategy requires navigating a range of external and internal risks. We maintain a proactive approach to risk management, ensuring that strategic delivery remains resilient and adaptive.

The Board, supported by the Risk and Assurance Committee, plays a key oversight role through regularly assessing and stress-testing risks and opportunities. Under the Board's strategic guidance, the Secretariat continues to actively manage risks and implement effective mitigation measures to support the achievement of our strategic objectives.

We monitor risks through regular reviews and integrate mitigation measures into our planning and budgeting processes. Our financial reserves and designated fund provide a buffer against volatility, whilst our flexible cost structure supports adaptive responses.

Section
8

Our commitment

SBP's 2026–2030 Strategy builds on over a decade of progress and positions us to deliver greater impact across a broader landscape. As we enter this next phase, our commitment remains clear: to uphold the integrity of our certification scheme, support the responsible growth of the bioeconomy, and deliver value to all those we serve.

We will:

- Define good biomass and responsible sourcing through inclusive, evidence-based standards.
- Maintain a rigorous, independent assurance system that builds trust and credibility.
- Support Certificate Holders in achieving climate, biodiversity, and social goals.
- Provide verified data and insights to inform policy, investment, and sustainability reporting.
- Operate as a lean, transparent, and financially resilient organisation.

We will strengthen:

- The scope and relevance of our Standards where there is demand, including new feedstocks, geographies, and end-uses.
- Our digital infrastructure to enhance traceability, data integrity, and user experience.
- Our ability to measure impact, learn from evidence, and continuously improve our practices through developing and implementing our Monitoring, Evaluation and Learning system.
- Our engagement with civil society, policymakers, and rights holders.
- Our beyond certification agenda, using data, partnerships, and thought leadership to support due diligence, inform policy, and enable broader sustainability outcomes across the biomass value chain.
- Our strategic positioning in emerging markets and sectors, including carbon removals and bio-based materials.

Through this Strategy, we reaffirm our role as a catalyst for responsible biomass sourcing and a trusted partner in the global transition to a circular bioeconomy.

Section
9

Contact us

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