



News Review

Issue Sixty

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Each month we review the latest news and select key announcements and commentary from across the bioenergy sector.



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Foreword

A warm welcome to March's Bioenergy News review.

As spring is in the air, here in the UK that means it is Budget time. Unfortunately, the government's Budget has been a non-event as far as Bioenergy is concerned, leaving many members of the industry worried at the lack of certainty surrounding their sector. Despite the Budget pledging unreserved support for fossil fuels including North Sea oil and shale gas, no such support was pledged to renewables of any kind over the same time period, with subsidies being slashed for solar energy. A decision was due on the future of the Levy Control Framework, which has previously provided funding to low-carbon energy projects, but this has now been delayed, preventing developers from planning for future developments. With the Brexit process set to begin by the end of the month, uncertain times lie ahead for all, and for those of us in Bioenergy it is no different.

But that uncertainty, it seems, has not deterred the sector from continuing to develop in the UK. Widnes in the North-West is set to be the site of one of the biggest Anaerobic Digestion plants in Europe, with expansion plans afoot as part of ReFood's continuing efforts to find solutions to deal with food waste. This, coupled with an announcement by Rika that they may well have cracked the main problem with using straw as AD feedstock – bypassing the cellulose cell wall, shows that AD's torch is burning just as brightly in the UK as ever. In addition, 2016 was a successful year for Drax as they continued to spearhead biomass power in the UK, and they are looking forward to another successful year in 2017. The celebration of this success is short-lived as the recent Chatham House report, entitled '*Woody biomass for power and heat impacts on the global climate*' continues to face an increasing backlash from industry, and now over 125 academics from the International Energy Agency Bioenergy Technology Collaboration Programme have joined the campaign to address the 'misleading' content of the report.

Perhaps the take-home message from this month's news is: despite all the uncertainty and miscommunication, there is still great success to be had, something we all hope continues into the post-Brexit era.

Read on for the latest bioenergy news.

Policy

Hike in landfill tax



Geograph

The Treasury has announced that from 1 April 2018 Landfill Tax will be set at £88.95 per tonne for standard rate material and £2.80 per tonne for lower rate material.

The rate of Landfill Tax will this year rise from £84.40 to £86.10 per tonne for the standard rate and £2.65 to £2.70 per tonne for the lower rate from April 1.

The announcement comes as this months' Budget revealed that the Government intends to consult on "extending the scope of Landfill Tax to illegal disposals of waste made without the required permit or licence".

The Environmental Services Association says this will help punish the criminals who "undermine legitimate operators in our industry and restrict the option of illegal dumping as a means of avoiding landfill tax".

Click here for more information.

RHI reforms receive cold response from Wood Heat Association

WHA members have expressed concerns regarding the proposals put forward by BEIS to reform the support for biomass CHP. It will negatively impact the development of small and medium-scale biomass CHP plants and that the proposals will make them economically unviable to build. The 20% efficiency originates from the CHPQA, whose remit has traditionally been conventional and very large scale CHP where 20% would indeed be an achievable level of power efficiency. This level is unachievable in practice on small to medium scale Biomass CHP because advancing the power generation efficiency towards this level will render the heat derived from the CHP to be of such a low quality that it is not usable, thereby not being sufficient quality CHP.

Although outside of the scope of this consultation, it is worth keeping in mind the current proposals on grid charging for electricity generators connected to the distribution grid network, which would see a 95% reduction in the benefits they receive for not using the transmission network. This, together with the biomass CHP proposals, may well push many such schemes outside of profitability.

Defining efficiencies against NCV fairly measures the quality of an installation, whereas GCV penalises good quality installations for the moisture content of their fuels. Therefore, NCV must be used to measure the power efficiency of projects against the proposed threshold if this is kept.

Click here for more information.

UK's spring budget ignores bioenergy sector

The Chancellor's Spring Budget will keep the renewable and smart technology industries in a state of limbo. Key decisions regarding the future of the Levy Control Framework (LCF) and the Carbon Price Floor have been delayed, despite support being extended to the North Sea oil and gas sector around decommissioning

At present, there is no clarification around the future of the LCF, a pot of funding and policies that have in the past supported low-carbon innovation and deployment, beyond 2020/201. This budget also contained no new information about the Government's intentions regarding the future of the Carbon Price Floor.

Both these policies underpin low-carbon power deployment. The continued lack of clarity around their future is making it difficult for developers to plan for new low-carbon energy infrastructure into the 2020's as the country decommissions its ageing coal and nuclear fleet.

Furthermore, the industry is frustrated at a disproportionate rise in business rates for rooftop solar developers, which will punitively harm those businesses actively trying to reduce bills and decarbonise their power supply.

Click here for more information.

UK Government to reduce embedded benefit for small-scale renewables by 95%



REA

The Government has proposed an up to 95% reduction in payments that are made from energy suppliers to smaller, decentralised, and often renewable electricity generators. The REA sees the proposed "embedded benefit" cuts from around \pm 45/kW to around \pm 2/kW (for the main element of the benefit) as a detrimental, piecemeal step that turns a blind eye to the wider historic changes taking place in the energy market at present.

Despite a parallel Government call for evidence on creating a more smart, flexible energy system, the proposed actions would penalise smaller-scale projects and in turn support larger, conventional power stations. As the proposed changes would not be "grandfathered" in they would adversely impact existing projects in addition to future ones, a move which signals to investors that the UK is comfortable with penalising innovators and those that would seek to develop badly needed energy infrastructure.

The REA also believes that the move represents a step backwards for cutting-edge energy storage and demand-side response technologies, which stand to save the energy system billions of pounds.

While the REA agrees that regulatory change is needed to account for the significant uptake in decentralised generation, renewable power deployment, and the growth of associated clean technologies (such as storage and flexibility), such a narrow focus on one issue ignores the wider issues at play and could lead to greater complexity and further market distortion.

Click here for more information.

Ofgem announces "Regulatory Sandbox" enquiry

Ofgem's Innovation Link is a 'one stop shop' offering support on energy regulation to businesses looking to introduce innovative or significantly different propositions to the energy sector.

Ofgem want to support innovative ideas that bring benefits to consumers. This also helps to understand emerging trends in the sector and identify areas in which regulation may need to adapt to sustain innovation.

If you have a new business proposition, Ofgem offer a dedicated service to provide fast, frank feedback on the regulatory framework and what it might mean for you. They are also developing a programme of general support to help innovators get started in understanding the regulatory framework.

Ofgem are now inviting expressions of interest for a potential regulatory sandbox. The regulatory sandbox will allow innovators to trial business propositions that will benefit consumers without incurring all of the usual regulatory requirements.

In order to be eligible, the concept must either be ground breaking or significantly different to existing offerings, or must offer a good prospect of benefits to consumers. The innovator must also be able to demonstrate why it needs a sandbox arrangement – i.e. what regulatory barrier currently exists that impedes the business trialling the new proposition, and that barrier must arise from requirements or provisions enforced by Ofgem.

Click here for more information.

Markets

Shanks Group changes name to Renewi



Renewi

Following the completion of the merger with Van Gansewinkel Groep B.V. ("Van Gansewinkel") announced on 28th February 2017, Shanks is delighted to announce that it will be re-launching the combined business under a new brand, which will include re-naming the Company from Shanks Group plc to Renewi plc. The change was reflected on the London Stock Exchange and trading commenced under the new ticker "RWI" from 1 March 2017.

Renewi is a leading waste-to-product company ideally positioned to be part of the solution to some of the main environmental problems facing society today: reducing waste, avoiding pollution, and preventing the unnecessary use of finite natural resources. Their combined recycling capabilities contribute to preserving the environment by transforming waste into valuable new products and raw materials. The circular economy aims to eradicate waste and this is fully aligned with Renewi's vision to "waste no more". The new name, Renewi, reflects the heritage of the legacy companies, their complementary businesses and expertise, and their combined position at the centre of the circular economy. The name also highlights that innovation to develop new products and high-quality secondary raw materials is very much part of Renewi's future.

Following extensive planning that has been underway prior to completion, a new senior management team has been put in place to help ensure the integration of the businesses progresses seamlessly and at pace.

Click here for more information.

Research & Development

Rika Bioextruder process straw for AD feedstock



Pixabay

Rika Biofuels is bringing the Bioextruder to the UK market through sister company Rika Biogas Technologies (RBT). The Bioextruder is a simple, cost-effective and commercially proven technology that processes straw and other lignocellulosic materials, such as low-quality grass or cereal husks, for use as an AD feedstock. There are around 200 Bioextruders operating on biogas plants throughout the Continent. The equipment destroys the cell wall structure of the material through a thermo-mechanical process akin to steam explosion (but without the needed for added heat), allowing bacteria access to organic matter which would otherwise be locked away.

Long-running tests carried out by Rika on a smallscale pilot digester are showing results of over 400m³/fresh tonne of extruded dry straw, allowing substantial volumes of energy crop to be substituted for straw, thus creating significant cost savings to AD plants. Tests have also shown that bioextrusion can increase biogas yields from maize by up to 15%.

The equipment can easily be retrofitted to operational AD plants and can achieve a typical payback of 2-3 years, depending on scale and application. The Bioextruder presents an exciting opportunity for AD operators to optimise the financial performance of their plants, whilst also allowing plants to meet new sustainability criteria that demand 50% of a plant's feedstock must be waste or crop residues.

RBT has partnered with Birch Energy who bring engineering and design skills to the team as well as a service capability from their existing team of service engineers.

Click here for more information.

Puregas solutions offer reduced Methane Slip

As the world's environmental agencies seek to crack down on avoidable GHG emissions in future, sustainability criteria are key to securing incentives such as the Renewable Heat Incentive.

For example, a biogas upgrading plant with 98% methane recovery will 'slip' 2% of the methane in

the raw biogas to atmosphere. A plant operating 8,500 hours per year, processing 2,000Nm³/h of biogas with 55% methane content, will slip $22Nm^3$ /h of that methane to the atmosphere.

That is 187,000 Nm³ of methane per year. The equivalent of over 179,000 tons of CO2 emissions. Never mind the significant loss of revenue from the renewable natural gas sales!

Technologies are available with a methane slip of only 0.1%. It's extremely important therefore to carefully consider the technology choice when factoring in the revenues, Sustainability Criteria and environmental impact of a given biomethane project.

With over 20 years of experience Puregas Solutions manufactures and supplies Biogas Upgrading Plants. The unique CApure upgrading process recovers over 99.9% of the available methane from the raw biogas, maximising biomethane yields and revenues with exceptionally low operational costs. Puregas provides fully integrated solutions for biogas upgrading and have over 30 plants already operating.

Our process recovers over 99.9% of the biomethane present in the raw biogas by separating the CO2 from the biogas through a process of chemical adsorption. The selective organic solvents used in this process are so efficient that the end product can contain more than 99% methane and is suitable for vehicle fuel or to be injected into the natural gas grid.

Click here for more information.

Online tool to aid with Food Waste collection

WRAP trials have proven that low cost intervention measures, such as using bin stickers

and caddy liners, can increase the amount of household food waste collected for recycling.

Designed especially for food waste collectors and processors working jointly, WRAP's new Cost Benefit Analysis tool can help you weigh up the costs and associated benefits of implementing those proven intervention measures, based on the specifics of your local arrangements.

This easy to use tool applies locally generated information about the collection and treatment of food waste, in order to generate a fully bespoke assessment of what the costs and benefits might look like for implementing a range of measures.

It has been developed as part of the Food Waste Recycling Action Plan (FWRAP), a cross-industry initiative to increase both the supply and quality of household and commercial food waste available for recycling.

Click <u>here</u> for more information.

Biomass Heat & Power

2016 a good year for Drax



Drax

Biomass Magazine reports that Drax Group has released its preliminary results for 2016. Drax's

power generation business has had a good operational year, highlighting the granting of its state aid approval for a contract for difference (CfD) in December after a lengthy delay, and completion of the conversion of Drax's third power unit to wood pellets.

In 2016, 75 percent of Drax's power generation was derived from biomass, granting it the title of the largest single-source of renewable energy in the United Kingdom, having produced 1.27 terawatt-hours (TWh) of renewable power. Drax generates 16 percent of the renewable electricity in the U.K., but in terms of support costs, Drax reports that it only represents around 10 percent. Currently, two of Drax's units are supported by grandfathered renewable obligation credits (ROCs), and the other by the CfD.

Click here for more information.

Gateshead District Energy Centre opens



Wikimedia Commons

A ground-breaking energy scheme that will cut energy bills and carbon emissions for homes and businesses in Gateshead was opened on 1st March 2017.

The newly-completed Gateshead District Energy Centre is the first of its kind and scale in the North East and will generate and supply low-carbon, low cost energy for up to 350 local homes and businesses in the area. Unlike conventional power stations, Gateshead's District Energy Centre is capable of capturing waste heat created during the energy generation process and recycling it to keep buildings nearby warm. In addition, the network has been designed to ensure the Energy Centre will be able to meet all the energy needs of future developments planned for Gateshead town centre, underpinning the redevelopment of the Baltic Business Quarter, plus the Gateshead Quays area and major housing developments.

The energy centre uses a pair of 2MW gaspowered combined heat and power (CHP) plants to generate enough electricity to power 5,000 homes, with the waste heat from the engines being recovered to provide hot water for heating.

Affordable energy and clean growth is a key pillar of the government's Industrial Strategy green paper, with a clear commitment to ensure the supply of secure, affordable and clean energy for businesses and households across the UK.

Click here for more information.

Electricity connection between UK and France set for development



Wikimedia Commons

The new ElecLink electricity connection between Britain and France will provide greater access to the continental electricity market, and help to reduce consumer bills as electricity can be flexibly imported and exported to take advantage of cheaper prices.

The project will run through the Channel Tunnel between Sellindge in the UK and Les Mandarins in France. It will have the capacity to power up to 2 million homes and provide further resilience for Britain's electricity supply.

A combination of domestic electricity generation including new nuclear power, gas and renewables, as well as increased access for importing and exporting electricity supplies from Europe, means homes and businesses will have reliable power at the lowest possible price all year round.

Thanks to the Government's supportive regulatory framework, including allowing interconnectors to participate in the Capacity Market, and innovative solutions from the developer, this major new piece of infrastructure will be financed on a purely commercial basis, with no risk to British tax and bill payers.

Click here for more information.

Biogas

Powerhouse Energy to build gasification plant in North-West England

PowerHouse Energy PLC said it will site its gasification unit in the north-west when it arrives here in the UK this month (March). The University of Chester's Thornton Science Park will be host to the breakthrough technology.

Working with Waste2tricity and Peel

Environmental, PowerHouse hopes to connect the G3-UHt system to the micro-grid supplying power to the park.

At the heart of the ultra-high temperature gasification unit is a reactor that works oxygenfree at ultra-high temperatures to atomise virtually all household or industrial waste. What's created is a synthesis gas, or syngas for short, that can be used to generate electricity.

With a little more processing hydrogen can be produced which could then be used to replenish fuel cells. The by-product of all this is an inert substance that can be moulded into bricks or used as ground covering.

Don't confuse this sophisticated recycling system with incineration, which works at far lower temperatures and leaves behind all sorts of toxins - not to mention significant amounts of ash.

The G3 system's de-molecularisation capabilities allow for complete detoxification of wastestreams. There are all manner of applications for a technology that is able to recover up to 90% of the energy value of a material put through the reactor.

On the siting of the unit chairman Keith Allaun said: "We couldn't have envisaged a more ideal location for the siting of the G3-UHt, or a better relationship with University of Chester.

Click here for more information.

Veolia to run CHP plant for recycling plant

Veolia has increased its capacity for generating renewable energy from food waste with a contract to design and manage a 520kWe biogas-fired CHP energy plant for Rose Hill Recycling in Gloucestershire. The CHP plant is fuelled by the biogas derived from mixed food waste collected from across the Cotswolds and will save around 1750 tonnes of CO2 emissions each year. With a focus on sustainability the new CHP will increase the use of resources and make the site energy self-sufficient using renewable energy.

Based in Dymock, Rose Hill Recycling is a composting and recycling facility which processes 35,000 tonnes of food and farm waste per annum. Already playing a key role in Gloucestershire County Council's food waste recycling strategy the new CHP site is now be able to generate 4.56GWh of renewable electricity each year – enough energy to supply around 1400 homes.

The site's anaerobic digestion facility will use the heat from the CHP to help turn the food-waste, animal waste and energy crops into biogas. This is then fed back to the cogeneration unit to provide renewable electricity and heat forming a closed loop energy solution, taking the power demand off the local Grid, and contribute to the Government's target for 20% of the UK's power to come from renewables by 2020. The CHP plant is now delivering renewable energy, and will add to Veolia's existing 40MWe UK biogas electricity generating capacity.

Click here for more information.

ReFood to add one of Europe's largest AD plants



The UK's leading food waste recycler, ReFood, has revealed what the expansion of its Widnes plant will mean for the region's recycling capability. The site, which was inaugurated in 2014, will be expanding by 33% with the construction of a new Anaerobic Digester (AD) tank. Once complete, the site, which accepts food waste from across the North West, will be capable of processing 160,000tonnes of food waste a year – making it one of the highest capacity AD plants in Europe.

Every year, the UK produces around 15m tonnes of food waste according to official figures, with around half of that coming from households and the remainder, businesses and other organisations. Unavoidable food waste should be treated as a resource, as it can be recycled into energy and biofertiliser, helping to close the loop on the food supply-chain.

Construction of a new 3,500m³ digester tank at Widnes will substantially increase food waste recycling capability in the area, with the major towns and cities of the North-West set to reap the benefits. Sending food-waste to landfill can cost businesses and councils substantially more than having it recycled into energy. Typically, costs can be 46% higher.

The Widnes plant is conveniently situated between the major cities of Liverpool and Manchester, just 15 miles away from the iconic Royal Liver Building. The site will be able to accept food waste from both council collections, and businesses, and ReFood's advanced technology allows for the removal of packaging prior to recycling. The by-product from the process is turned into a high-quality fertiliser, for use by local farmers, thus completing the loop on the food supply-chain. The expansion works commenced in September and it is on a 22 week build program. The expansion will not affect the site's current capacity during the construction process.

Click here for more information.

BP buys Clean Energy Fuels Corp

BP plc has acquired the upstream portion of renewable natural gas producer Clean Energy Fuels Corp.'s business, and signed a long-term supply contract with Clean Energy to support its continuing downstream renewable natural gas business.

The companies said the transaction, announced March 1, would enable both companies to accelerate growth in renewable natural gas (RNG) supply and meet the growing demand for natural gas vehicle fuel.

Clean Energy, which launched its first stations in California in 2013, said it sold 60 million gallon equivalents of its RNG, dubbed Redeem, in 2016. Clean Energy Fuels produce, cleaned gas for transport from AD and landfill gas.

Click here for more information.

Energy from

Waste

North London receives consent for energy recovery facility



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The Secretary of State for Business, Energy and Industrial Strategy granted a development consent order (DCO) on 24 February for North London Waste Authority (NLWA) to build a replacement energy recovery facility, and associated development at the Edmonton EcoPark.

Now that North London Waste Authority has been granted a DCO, the Authority (which is made up of 14 councillors from each of the seven north London boroughs) will consider the consent, and any conditions included, at a meeting in April. The Authority will also need to develop the strategy for delivering the scheme over the forthcoming months.

The North London Heat and Power Project is NLWA's proposal to build a new energy recovery facility and associated buildings and works. The new energy recovery facility will replace the existing energy from waste plant at the EcoPark in Edmonton.

The replacement facility will take waste that cannot be recycled from north London households and local businesses and turn it into energy – both heat and power.

Following two rounds of public consultation, the application for a DCO to build the new facility, and associated development, was accepted for examination by the Planning Inspectorate (PINS) on 11 November 2015.

The Secretary of State then appointed an Examining Authority who was responsible for examining the application on their behalf.

Following the development of the delivery strategy construction preparation work could start in 2019. The existing plant would be decommissioned and demolished once the new facility is up and running by 2028.

Click here for more information.

Post-Brexit waste management plan proposed

In a major new report, Going Round in Circles, Policy Exchange says that Brexit presents a huge opportunity for the UK Government to develop a new approach to waste and resources policy. The report highlights significant shortcomings in the EU's approach to waste and recycling: the objectives are increasingly unclear, the targets are badly designed, and the policies are not in the UK's interest.

Rather than adopting the EU's proposed 'Circular Economy Package', which would cost British businesses an extra £2 billion over the next twenty years, the British government should use Brexit to define our own approach to waste and resource policy.

This should focus on maximising the resource productivity of the UK economy, in line with the Government's emerging Industrial Strategy. It should also seek to minimise the carbon emissions and wider environmental impacts of waste management and resource use.

The report makes the following key recommendations:

Household Waste Recycling Centres should also be collection points for reusable items, which can then be sold or redistributed to local charities. This approach is, bizarrely, illegal under current waste rules.

Local Authorities should use one of three standardised systems for collecting waste and recycling – simplifying the more than 400 systems which currently operate across England.

Government should encourage innovation in the recycling and reuse of materials, and help to develop markets for scrap materials.

Government should also promote efficient forms of energy from waste – for example using black bag waste to create 'green gas'.

Click here for more information.

Allerton Waste Recovery Park a year from completion

With more than 1.3m hours worked, construction at Allerton Waste Recovery Park is now in its final phase and is around a year away from being fully operational.

Construction began in January 2015 with the excavation of more than 55,000 tonnes of earth to create the waste bunkers. During 2015 most of the work was focused on construction of the 22m deep waste bunkers and laying the foundations for the rest of the plant.

When operational, Allerton Waste Recovery Park will use three proven technologies to make the most of North Yorkshire's and the city of York's waste.

Incoming waste will first go through a mechanical treatment process which will extract materials such as plastics and metals which can be recycled; organic waste will also be separated and sent to an anaerobic digester which will transform the waste into renewable energy.

The remaining waste will be sent to the energy from waste plant which will use it as a fuel to create energy – the facility will export 24MW of energy to the National Grid every hour – enough to power the equivalent of 40,000 homes.

2016 saw the facility taking shape as the building which will house the mechanical treatment part of the facility was constructed; the anaerobic digestion unit was installed and the energy from waste plant was constructed.

During the early months of 2017, attention is focused on completing the building around the energy from waste plant and installation of the mechanical treatment equipment.

The facility will treat more than 320,000 tonnes of waste every year and divert at least 90% of this away from landfill.

Click here for more information.

Events

ADBA R&I Forum 28-29 March 2017 London, United Kingdom



AD has the potential to support four of the five UK Government Global Challenges and nine of the 17 UN Sustainability Development Goals (SDGs) that the countries of the United Nations have agreed must be achieved by 2030.

This is the must attend event to help your business stay ahead of the curve and take advantage of the market opportunities in this \$1trn global industry.

Click here for more information.

All-Energy 10 – 11th May 2017 **Glasgow, Scotland**



Since its launch in 2001, All-Energy has provided the industry suppliers, experts and thoughtleaders from the renewable energy supply chain the opportunity to connect with new customers, increase their sales opportunities and expand business networks in this fast-changing marketplace.

The free-to-attend annual conference and exhibition brings together the UK's largest group of buyers from the bioenergy, solar, offshore and onshore wind, hydropower and wave & tidal sectors, as well as those involved in energy storage, heat, low carbon transport and sustainable cities solutions.

Click here for more information.

World Waste to Energy 23-24 May 2017 London, United Kingdom



The World Waste to Energy & Resources Summit returns to London this May 23-24, 2017, and is shaping up to be the most international and highprofile event to date.

From the impact of Brexit and the upcoming CfD auction, to identifying ACT opportunities for growth and deriving high-value fuels and chemicals from waste, the summit welcomes waste management CEOs, project developers,

technology companies and financiers to discuss the greatest challenges and opportunities facing the industry.

Click here for more information.

EUBCE 12-15 June 2017 Stockholm, Sweden



The European Biomass Conference and Exhibition (EUBCE) is a world class annual event which, since

1980, is held at different venues throughout Europe.

The EUBCE covers the entire value chain of biomass to conduct business, network, and to present and discuss the latest developments and innovations, the vision is to educate the biomass community and to accelerate growth.

The EUBCE will host a dynamic international Exhibition for companies and research labs to showcase their latest products and bringing scientists, technologists and key players together with leading Biomass industries and organizations.

Click here for more information.

Prices

Historical auctioned prices of ROCs in sterling pounds, and total amounts of ROCs historically sold.



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