



Leading green gas
aggregator & shipper

Green terms for the long-term

The versatile uses of biomethane
in a sustainable economy

Rosanna Butters, Managing Director



Pivotal facilitator at the heart of GB green gas market



'A la Carte' Shipping Services
Producer needs are placed at the core of our service offering



- 1995**
Began actively trading in the GB gas market
- 2008**
Became licensed gas shipper in GB
- 2012**
Became first ever commercial biomethane shipper in GB and began trading in green gas certificate market
- 2013**
Became supplier for first bio-CNG station in GB
- 2017**
ISCC certified for sustainable practices & transparent supply chain management
- 2017**
Facilitated first sale of GB biomethane to mainland Europe
- 2021**
Became licensed gas shipper in ROI
- 2023**
Licensed gas shipper in NI

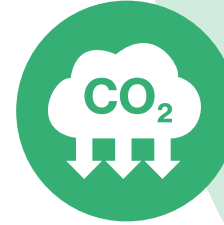
Biomethane: Long-term Market Potential and Benefits

Ready now and critical to achieving Net Zero

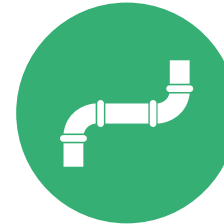


30-40 TWh

of biomethane production by 2050
would help the UK achieve net
zero cost-effectively



Can deliver carbon removal from the atmosphere for net-negative emissions



No changes required to existing grid or heating infrastructure



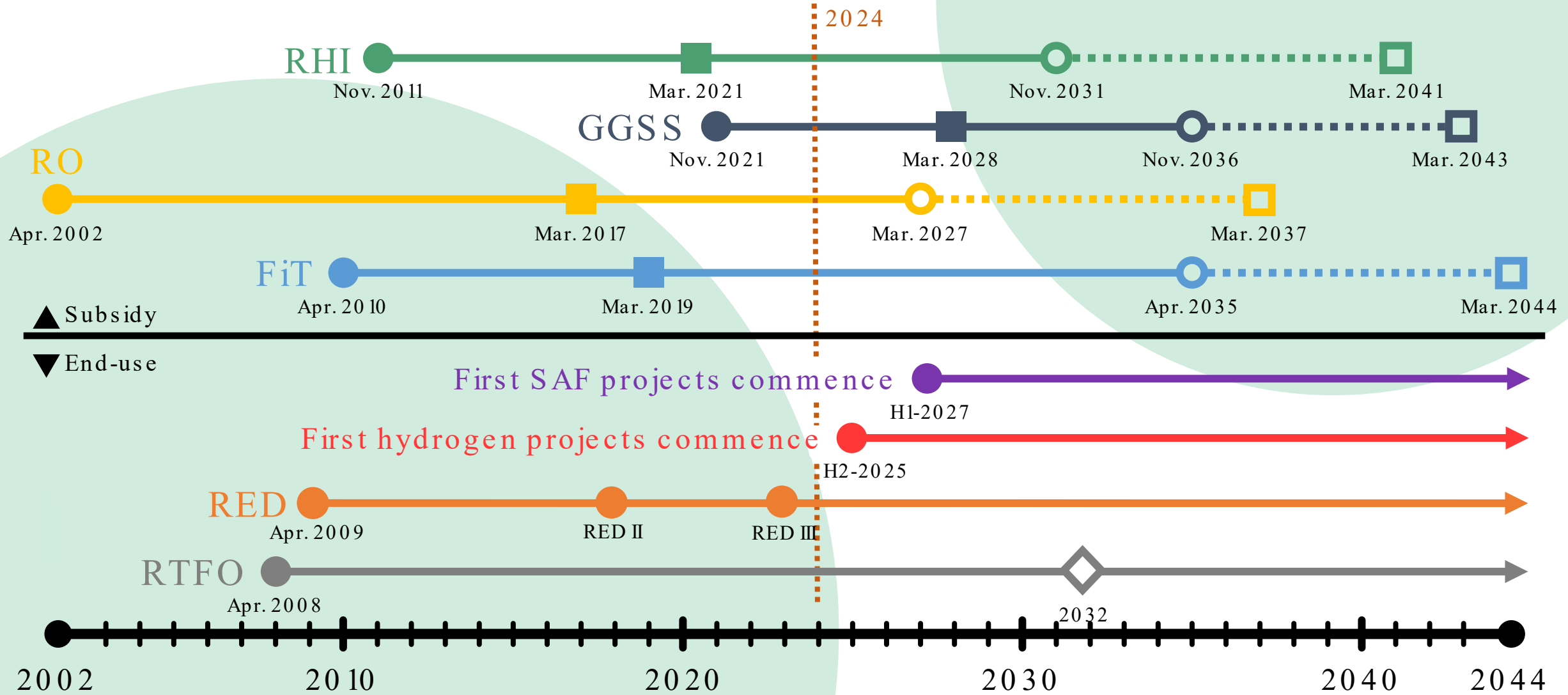
Long-term replacement for natural gas in hard-to-abate sectors



High-utility destination for unavoidable waste and residues

Subsidy Scheme and Project Timeline

Subsidies expire as end-user demand is set to grow



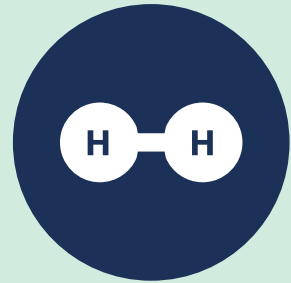
Key:

- Applications open
- Applications close
- First tariffs expire
- Scheme support ends
- ◇ RTFO increases defined

Long-term Uses for Biomethane



Transportation fuel



Hydrogen production

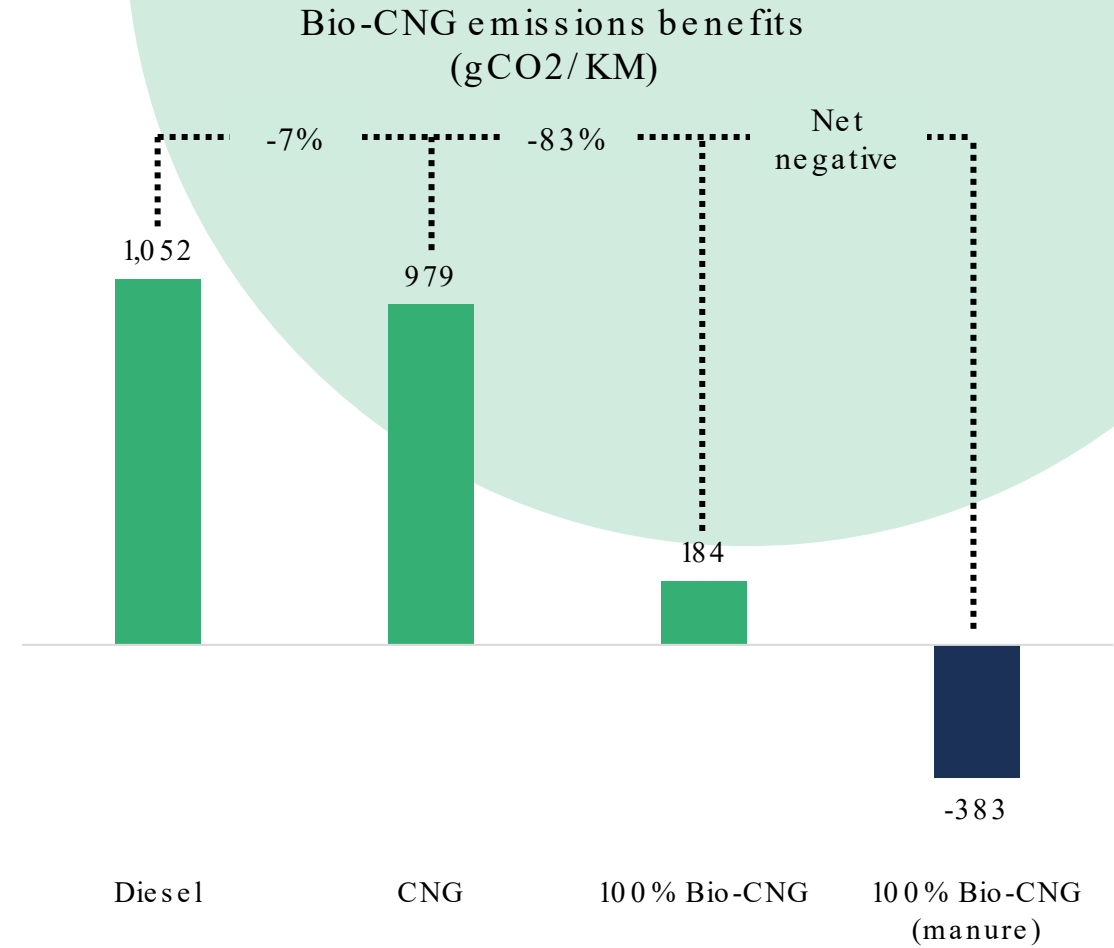
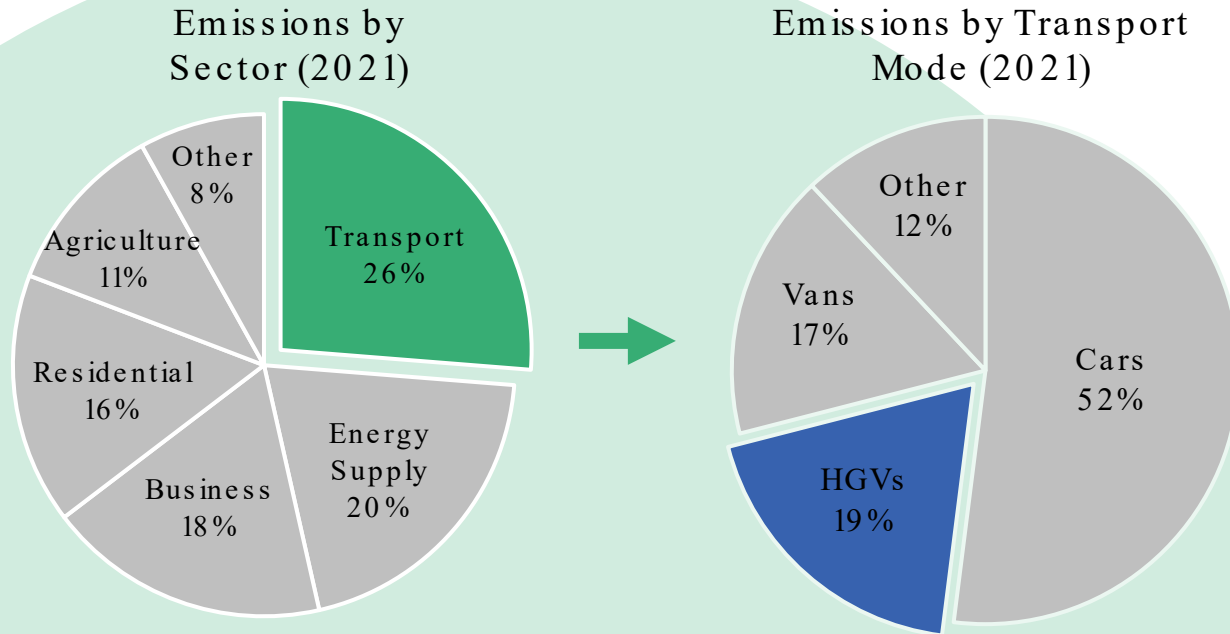


Delivery to end-users



Biomethane for Road Transport: Ready now, essential for net zero

Heavy Goods Vehicles (HGVs) account for 19% of total transport emissions

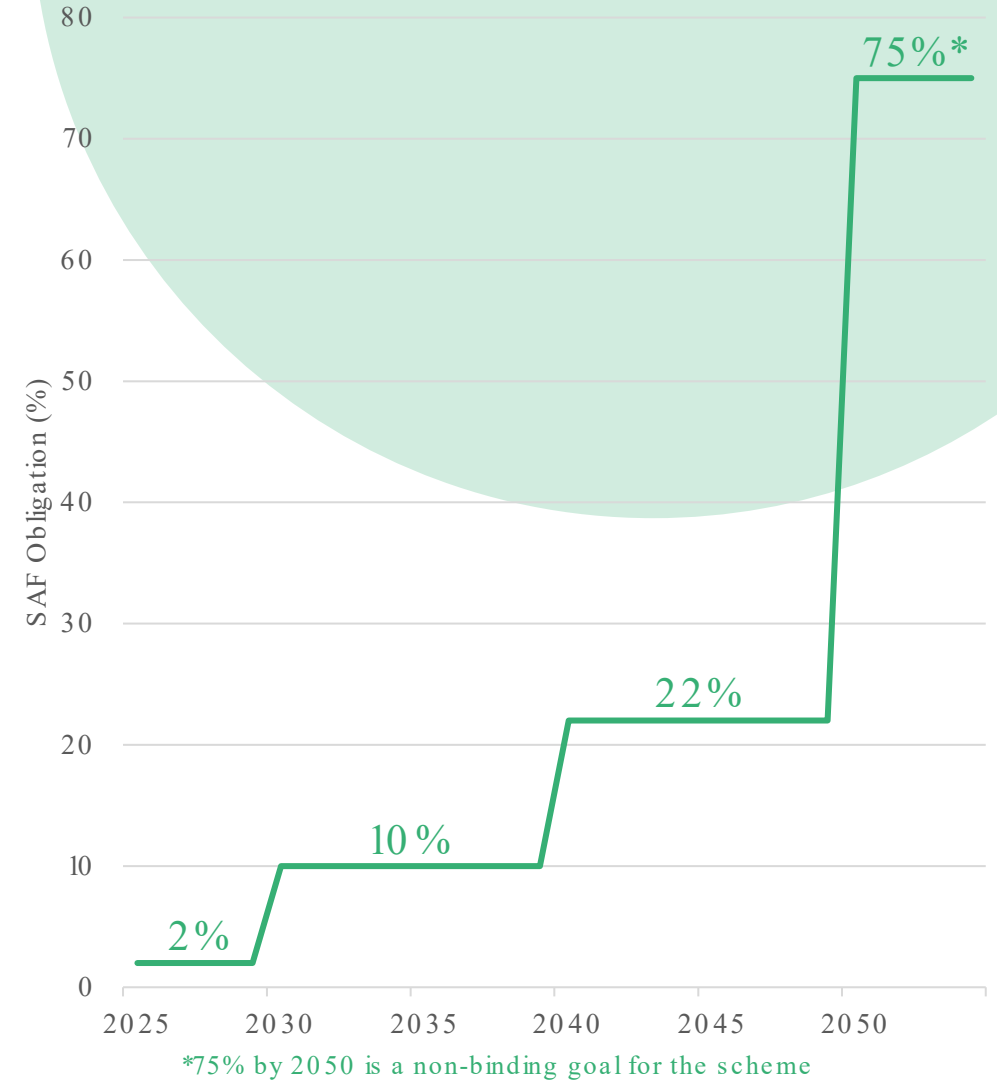
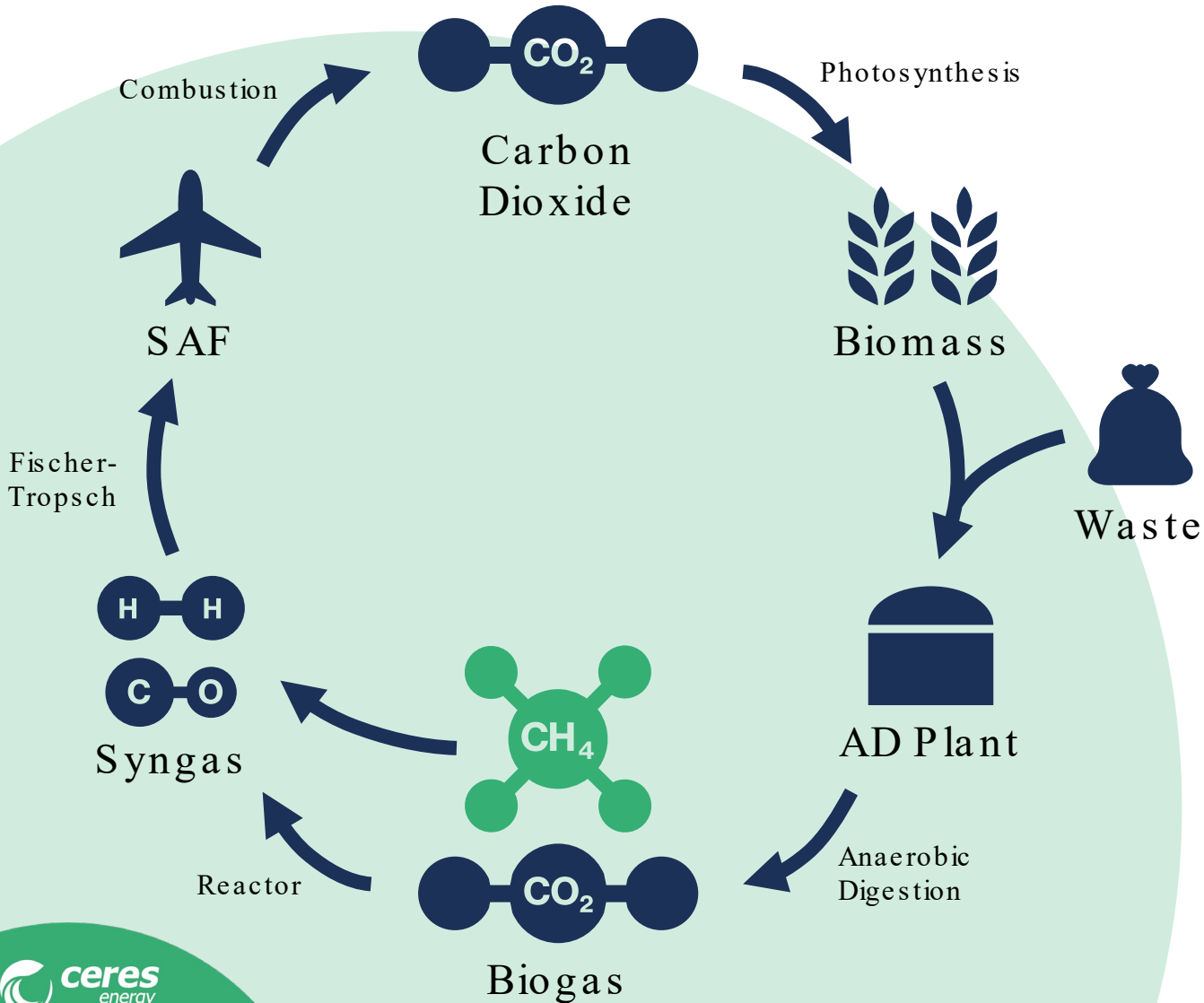


The number of CNG-fuelled HGV trucks on our roads is forecast to grow to ~2500 (+44% year-on-year growth)

Biomethane for Aviation: Production of Sustainable Aviation Fuel (SAF)



Large-scale SAF producers are looking for biomethane



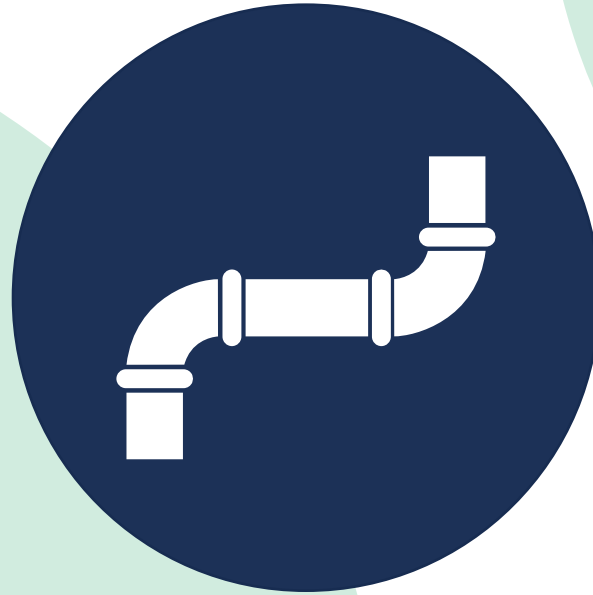
Biomethane for Green Hydrogen: Back-up Generation



During periods of low weather-dependent generation, biomethane can ensure security of supply



Green hydrogen plant experiences around 10% downtime



Plant could generate green kWh using biomethane delivered via the gas grid

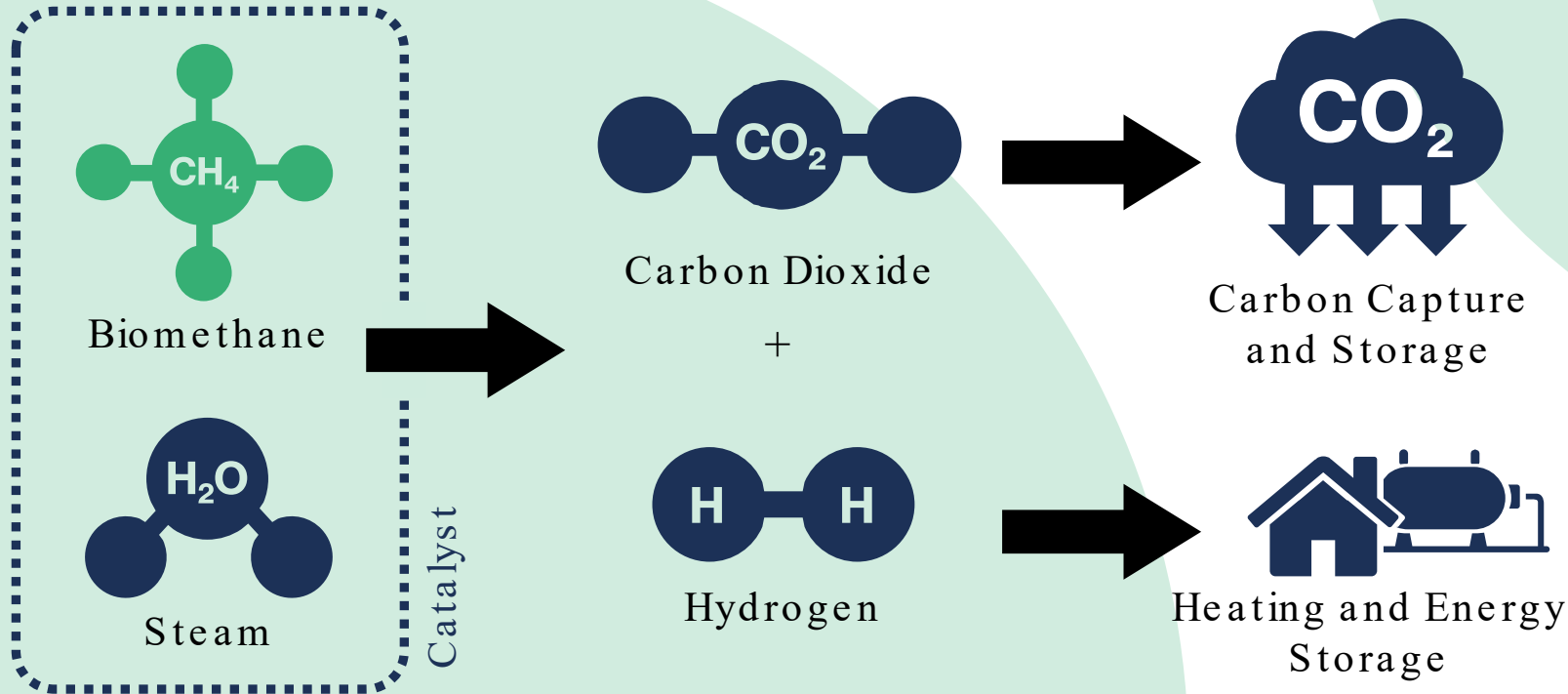


Gas can be withdrawn and delivered to green hydrogen plants via the NTS



Biomethane for Blue Hydrogen: SMR Feedstock

Biomethane delivers negative emissions when used as a feedstock in the production of hydrogen by Steam Methane Reformation (SMR)



National Grid ESO says at least 51 MtCO₂e will need to be removed from the atmosphere by 2050

Source: National Grid ESO, Future Energy Scenarios 2024

Biomethane: Market Participants

Producers' requirements often don't align with end-user needs

Biomethane production

- Private equity
- Farmers
- Developers
- Waste processing companies
- Factories and breweries
- Tech companies


Shippers link production with offtake via a licenced supplier

Biomethane offtake

- Large businesses
- Public sector bodies
- Data centres
- Road transport

Reliable long-term supply

RED II

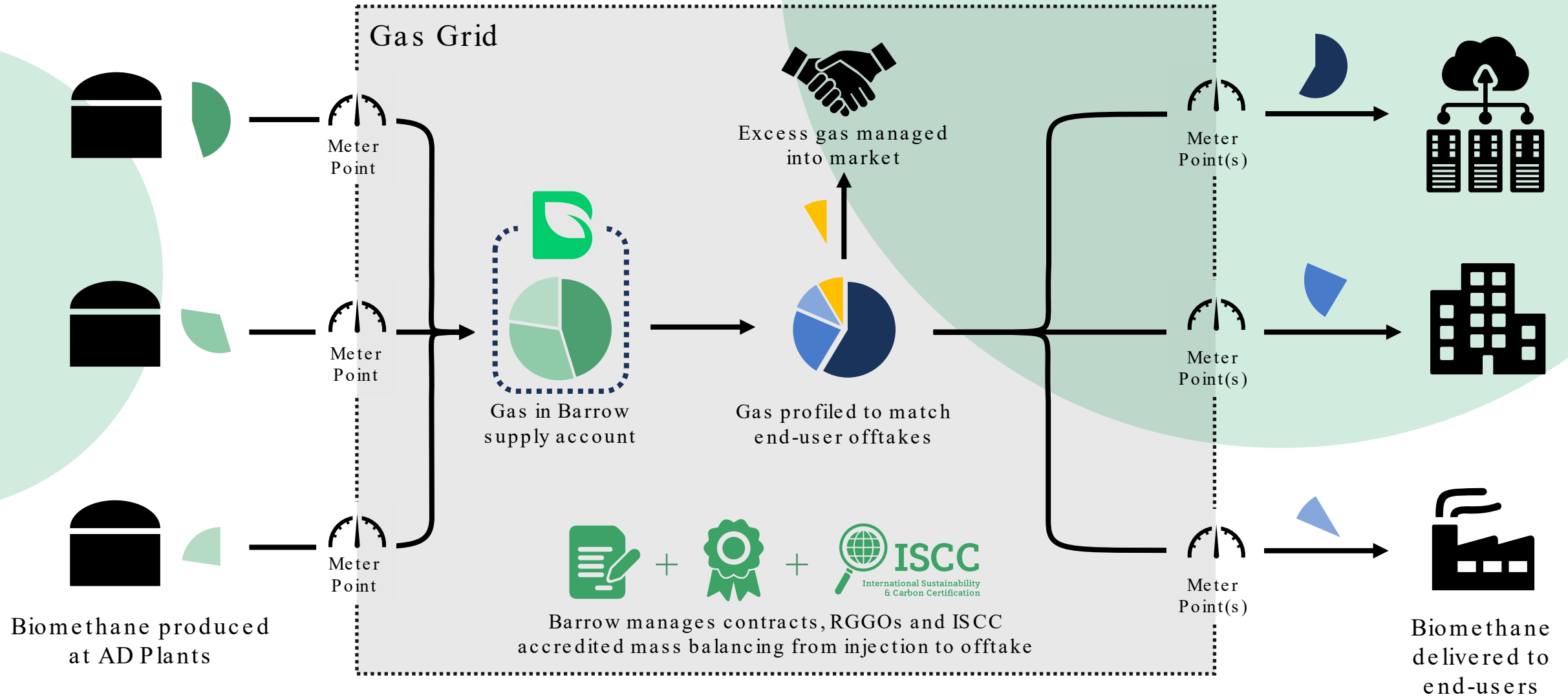
RHO

RTFO

Delivering Biomethane to End-users



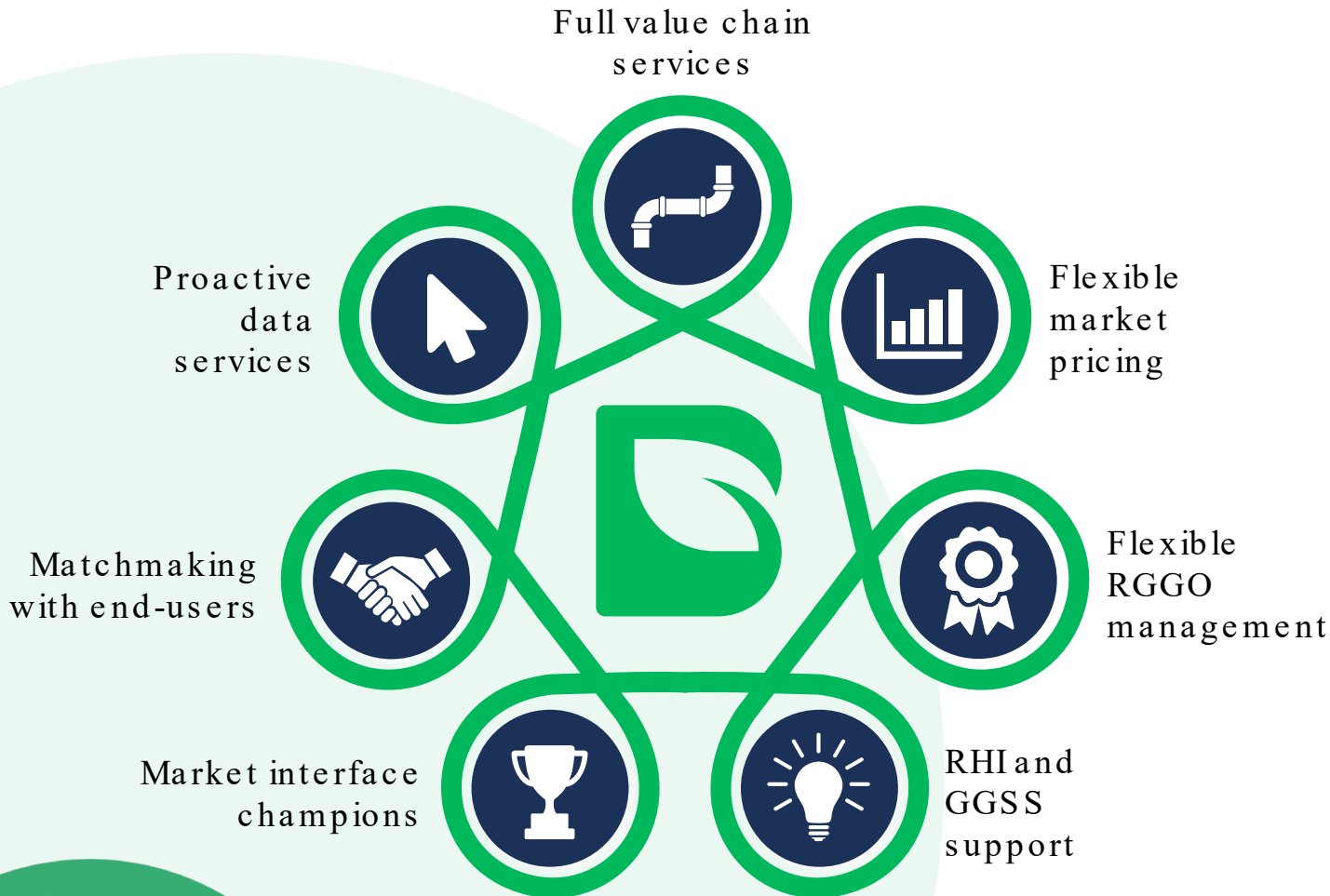
We are experts at matching supplies of biomethane with end-users, handling everything between entry and exit from the grid, smoothing out daily mismatches between supply and demand.



Green Therms for the Long-term: Critical to delivering Net Zero



Capitalising on the varied uses of Biomethane



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