

European Market Update

UK Green Gas Day, 5 September 2024 – Birmingham

Harmen Dekker, CEO of the European Biogas Association (EBA)

What's in this presentation for you?

- EBA in a nutshell
- Key figures on the biomethane market in Europe
- Future potential of the biomethane market
- Regulatory support for full valorisation of biomethane

EBA in a nutshell



EBA – representing the full value chain



≥ 300 MEMBERS

250 COMPANIES

50 NATIONAL ASSOCIATIONS


35 COUNTRIES

MEMBERHOLDERS




Socio-economic impact of biogases value-chain


2022:
220,000 jobs



2030:
460,000 jobs



2050:
1 Million jobs



20,000
Companies



+20,000
Plants



5.75 bn €
Turnover



A solid **European** value chain



Leadership in
Manufacturing tech



Contributing to EU
economic **growth**, **rural**
development and **climate**
change mitigation efforts

@EBA 2023

Key figures on the biomethane market in Europe



18% more biomethane in Europe in 2022



4.2 bcm 4.5 bcm installed capacity

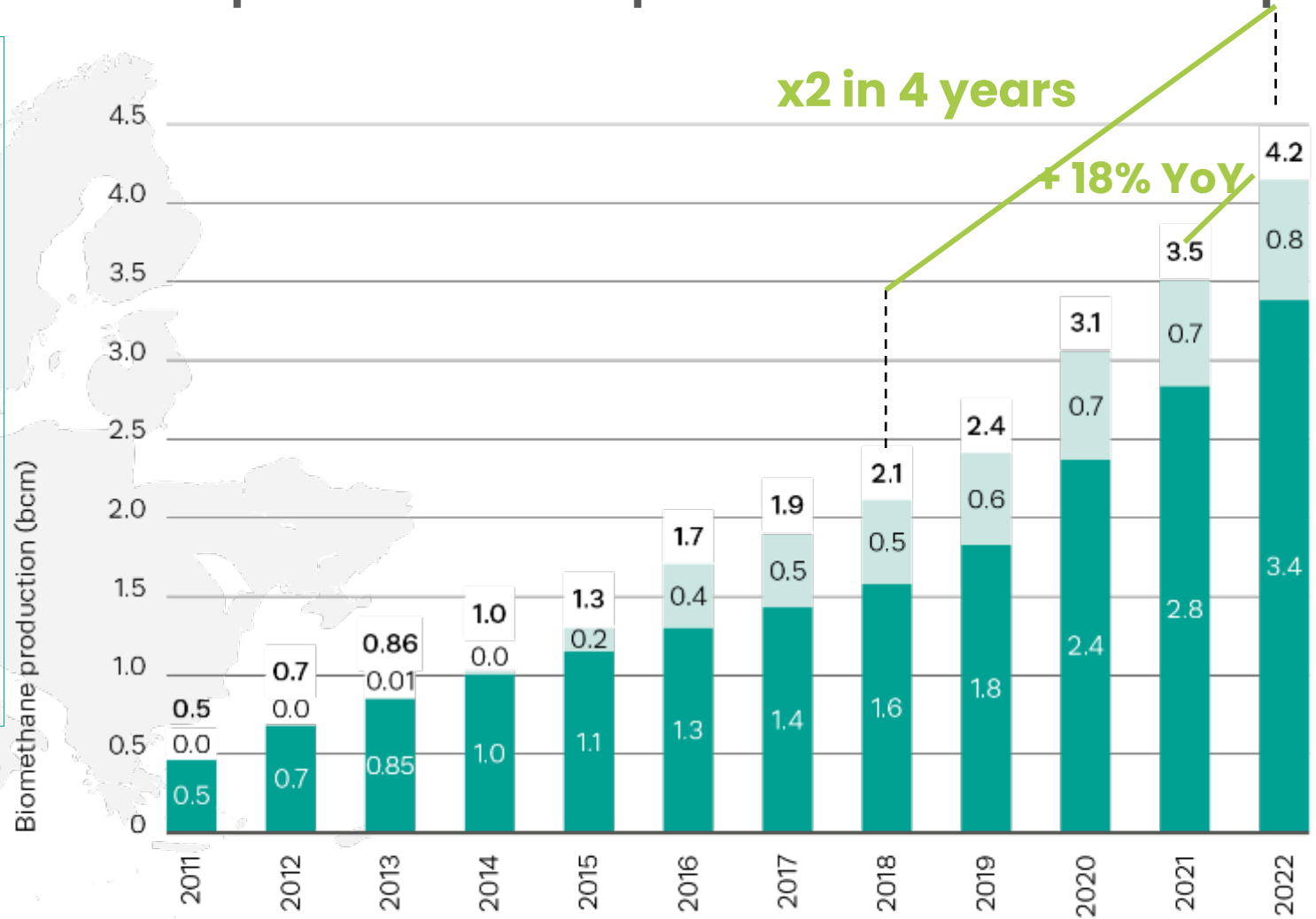
x2 production since 2018

24 countries producing biomethane.

UK, France, Italy, Denmark: fastest growing countries

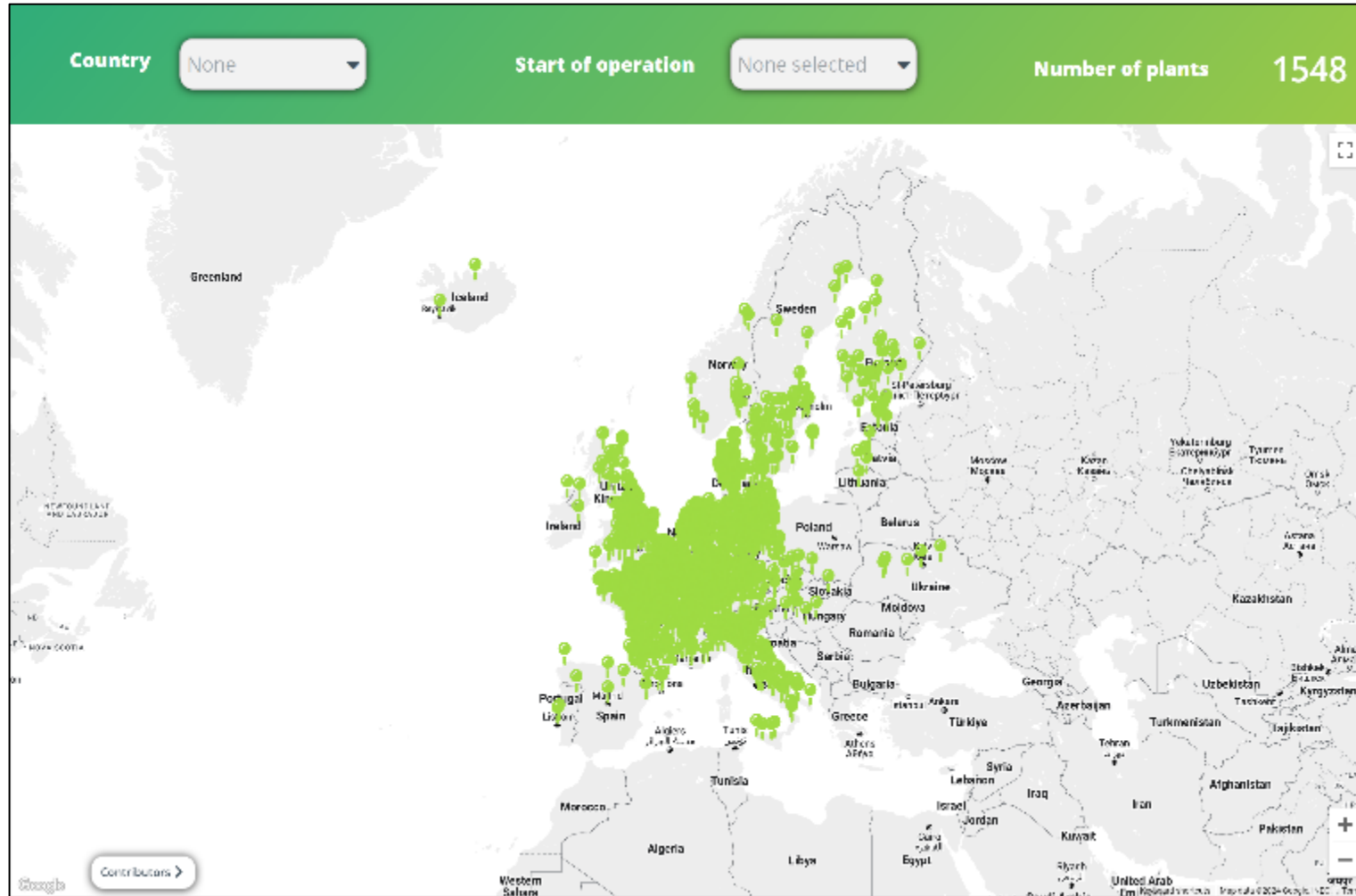


European biomethane production in EU-27 and Europe



■ EU-27
■ Europe

European Biomethane Map 2024: 1,548 plants in operation



[CHECK INTERACTIVE MAP](#)

6.4 bcm/year

Total installed capacity of biomethane plants in Europe

+80% grid-connected

32%

Growth from EBA Biomethane Map 2022 data

UK

119 plants

114,358 Nm³/h installed capacity

* 2024 biomethane map includes data up to Q1 of 2024

€27 billion earmarked to be invested in biomethane

6.3

bcm/year

of added biomethane
capacity in Europe by 2030

950

biomethane plants

to enter operation in
the next 5 years



**Denmark, Poland and
Italy**

are top countries for
planned investments

Biomethane: a versatile low-carbon fuel

Percentage of biomethane used per sector overall and per country

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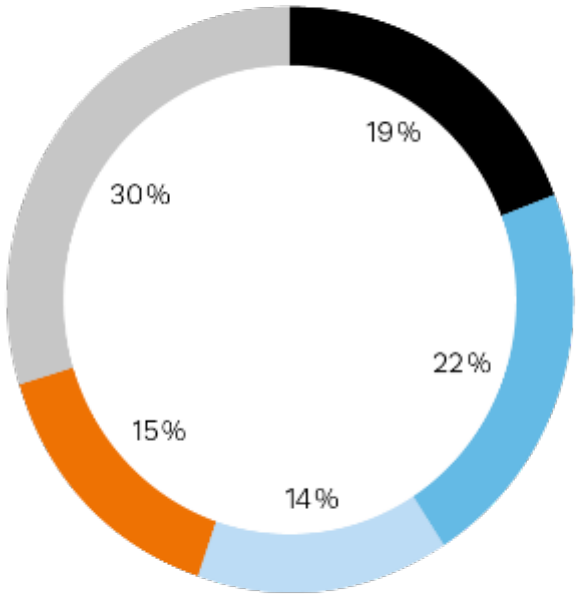


End-uses depend on country

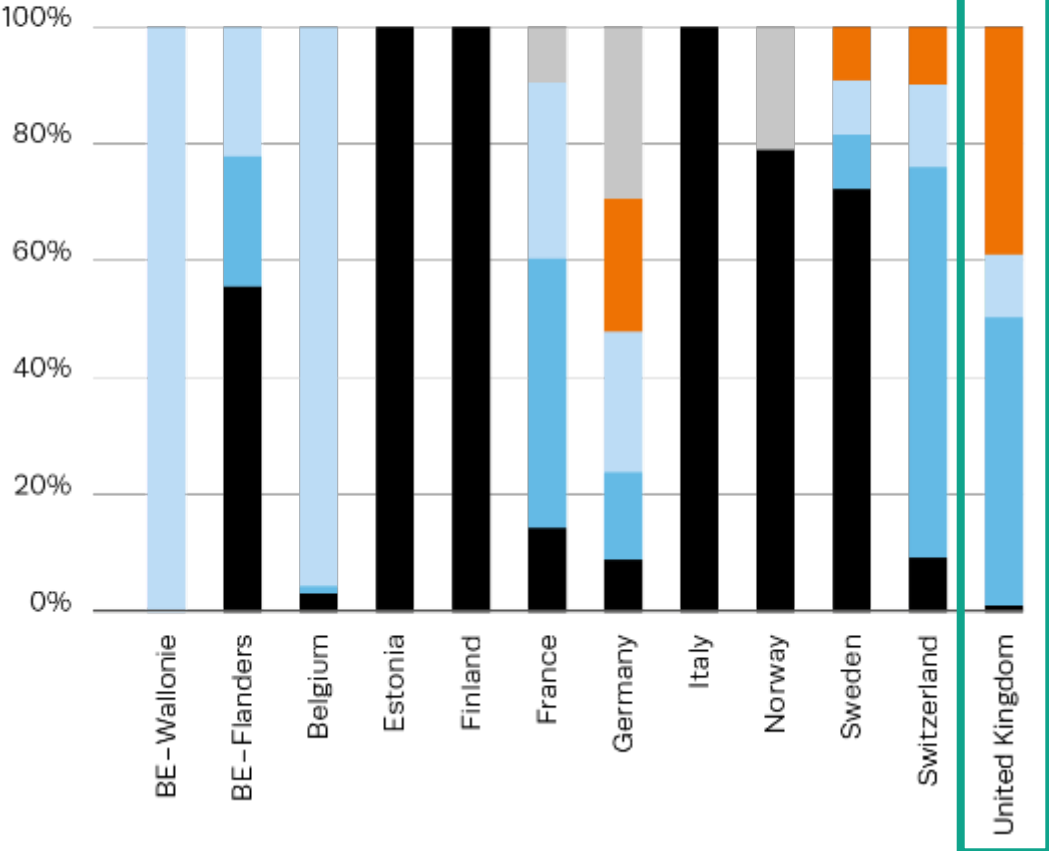
Transport



Heating or electricity



- Transport
- Building
- Industry
- Power
- Unknown



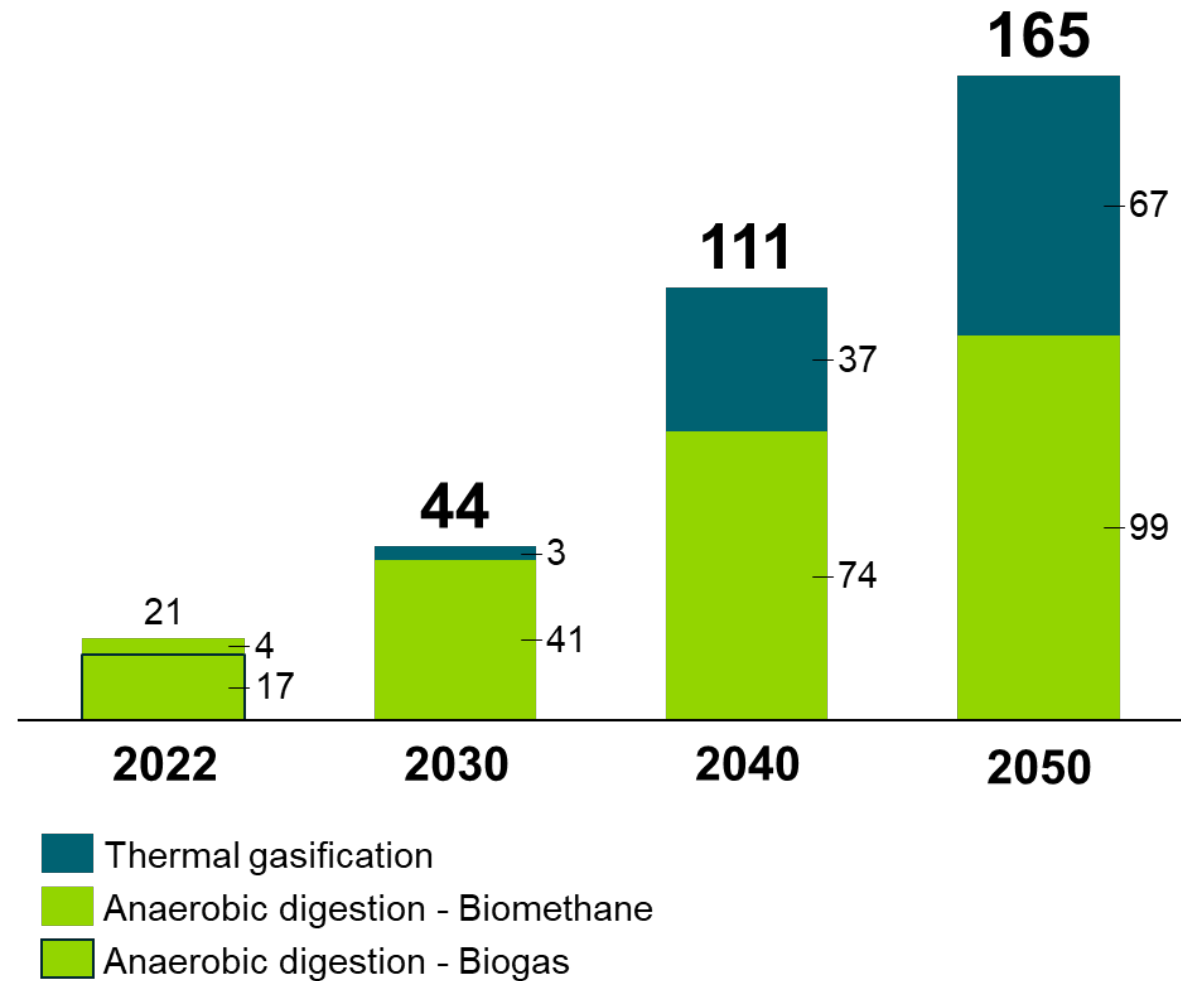
Future potential of the biomethane market



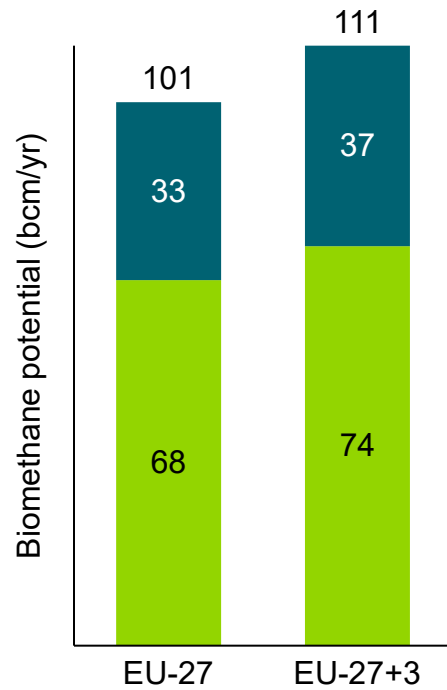
Significant potential to scale-up biomethane production to 2040 and beyond (Guidehouse study)

Biomethane production potential in Europe

- 44 bcm by 2030
- 111 bcm by 2040
- 165 bcm by 2050

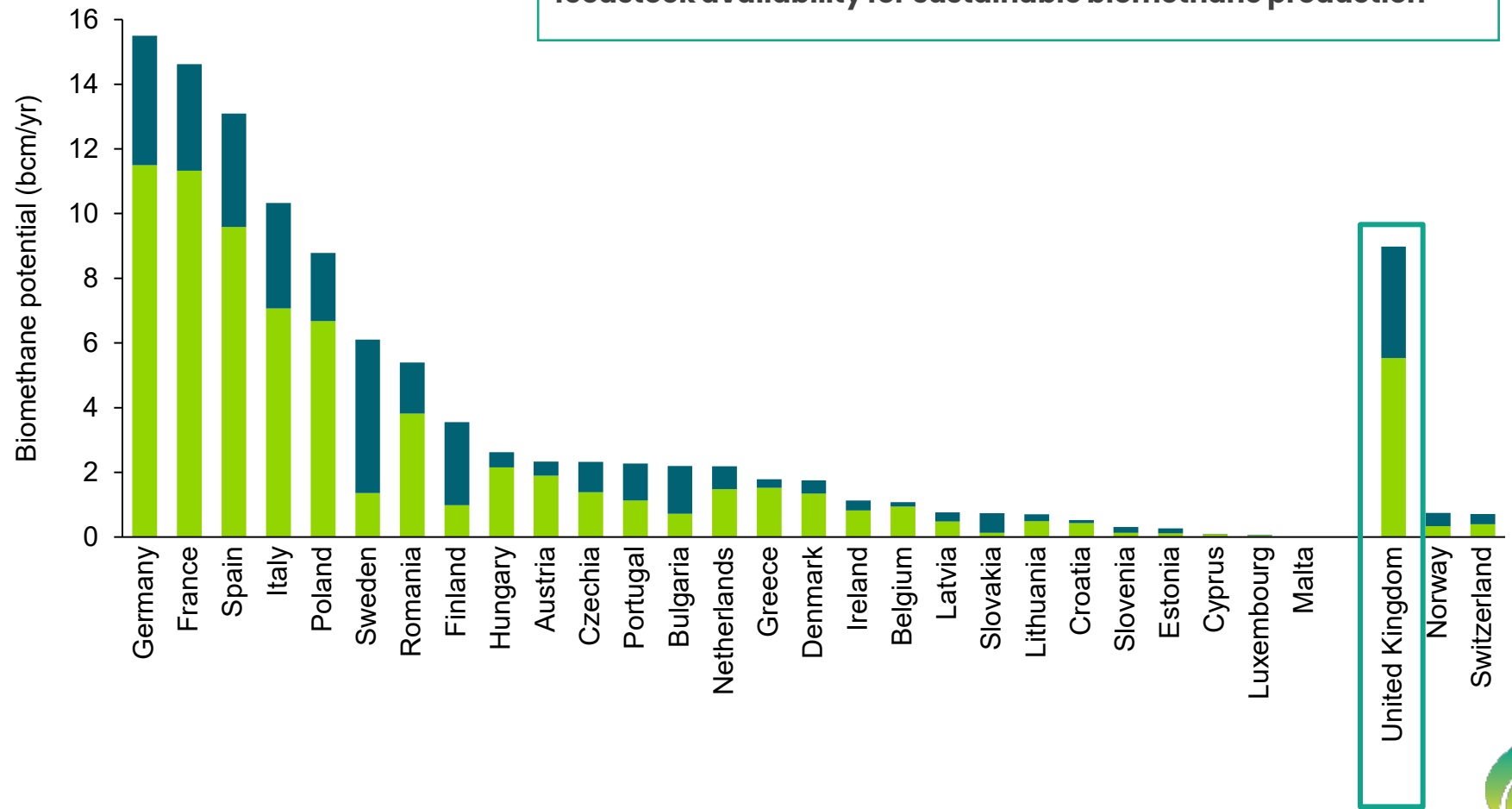


Biomethane potential of 111 bcm/yr in Europe in 2040 - dominated by anaerobic digestion



■ Anaerobic digestion
■ Thermal gasification

Estimates may deviate from nationally specific studies assessing feedstock availability for sustainable biomethane production



2040 Anaerobic digestion feedstock mix: dominated by sequential crops, agricultural residues and manure

- **2040 AD potential in Europe:**

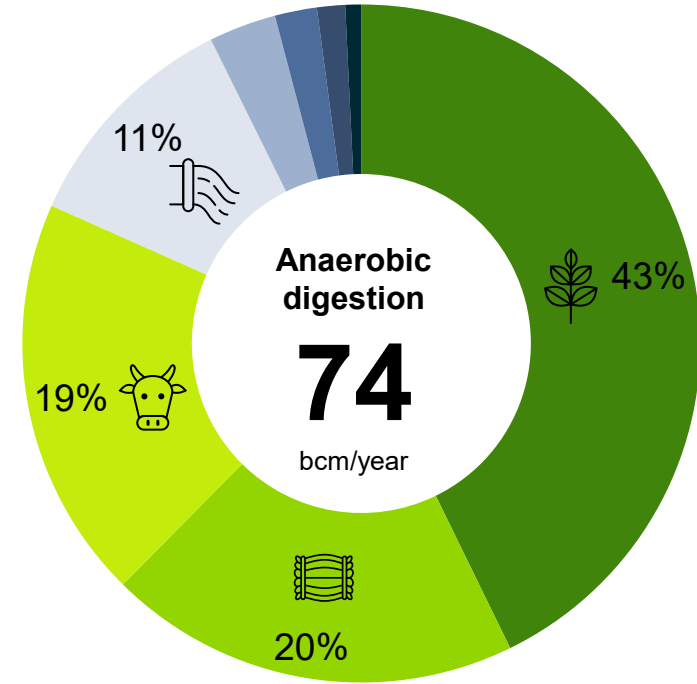
- 74 bcm/yr in Europe

- **Main feedstocks:**

- Sequential cropping
- Agri residues
- Manure
- Industrial wastewater

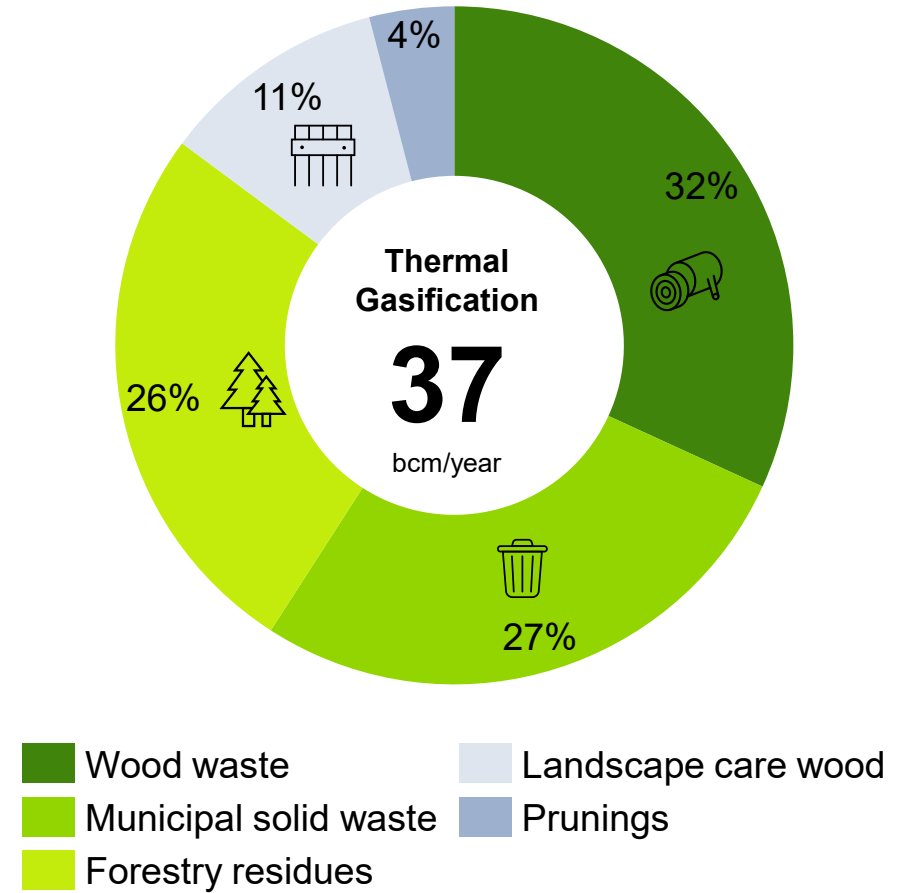
- **Top 5 countries:**

- Germany
- France
- Spain
- Italy
- Poland



2040 Thermal gasification feedstock mix: dominated by waste wood and residues and MSW

- 2040 **Thermal Gasification potential** in Europe:
 - 37 bcm/yr
- **Main feedstocks:**
 - Woody biomass based (mainly wood waste and forestry residues)
 - Municipal solid waste
- **Top 5 countries:**
 - Sweden
 - Germany
 - Spain
 - **United Kingdom**
 - France



Legislation: Access of biomethane to markets



Why certify your biogas as sustainable?

Compliance with sustainability criteria is necessary to:



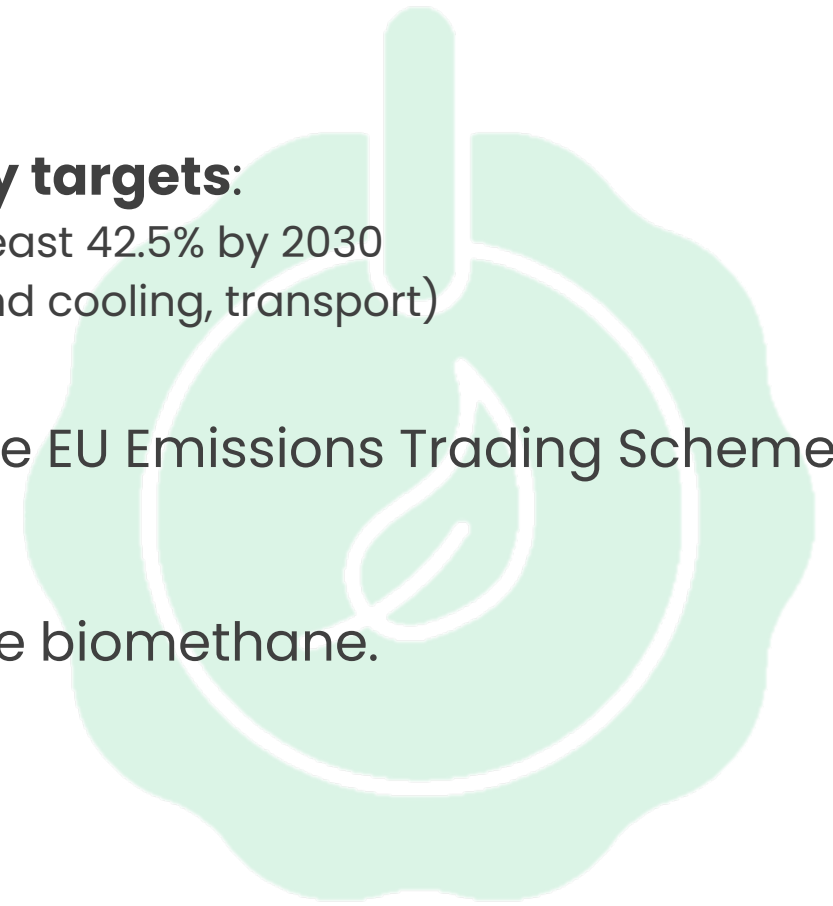
- Be included in the EU's **2030 renewable energy targets**:
 - overall renewable energy consumption target of at least 42.5% by 2030
 - sub-targets by sector (buildings, industry, heating and cooling, transport)



- Be counted as having zero emissions under the EU Emissions Trading Scheme (**EU ETS**).



- Be eligible for **financial support** for sustainable biomethane.



Roadmap towards a Single European Biomethane Market

One single trading instrument ?

To be explored for the mid-term future (2030)

1



GO-PoS Connection when they are issued for the same gas volumes

• Upcoming in 2025



Harmonisation in the content of certificates

- Implementation of GO registries in all EU countries
- Compliance with the updated EN Standard 16325
- Implementation of the Union Database
- Harmonised biomass codes

Single interfaces for exchanging certificates

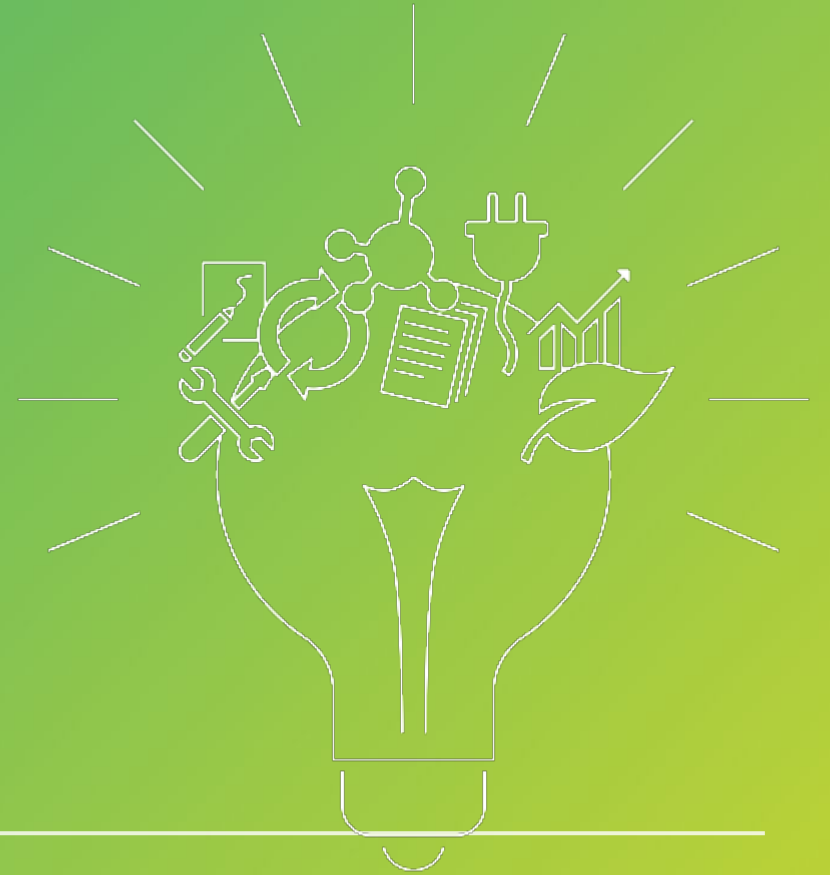
- 1 single interface for the transfer of Proofs of sustainability: the Union Database
- 1 single cross-border transfer scheme for GO & CoO

Harmonisation of documentation requirements

- For national support schemes (common data fields)
- For compliance under the EU ETS



Conclusions



Biogases shows strong growth and strong outlook

How to bolster this European energy with European technology



Solid and consistent **regulatory framework** (clear objectives and guidelines for the industry, positive signals for investors)



Encourage **sustainable** biomethane **production** (compliance with RED III, access to sustainable financing and EU ETS)



Facilitate **grid injection** and **cross-border trade** of biomethane



Increase investments on **R&D** to speed-up the development of new technologies, novel feedstocks and improve efficiency



Valorise **digestate and bio-CO2** as biomethane co-products

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