

# BIOGAS AND BIOMETHANE TODAY AND TOMORROW

**Salón del Gas Renovable, 1 October 2024**  
**Giulia Cancian, EBA Secretary General**

# EBA – representing the full value chain



≥ 300  
MEMBERS

250  
COMPANIES

50  
NATIONAL ASSOCIATIONS

35  
COUNTRIES



# 1. BIOMETHANE TODAY

# 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

# Biomethane is growing: X2 in 4 years

European biomethane production in EU-27 and Europe



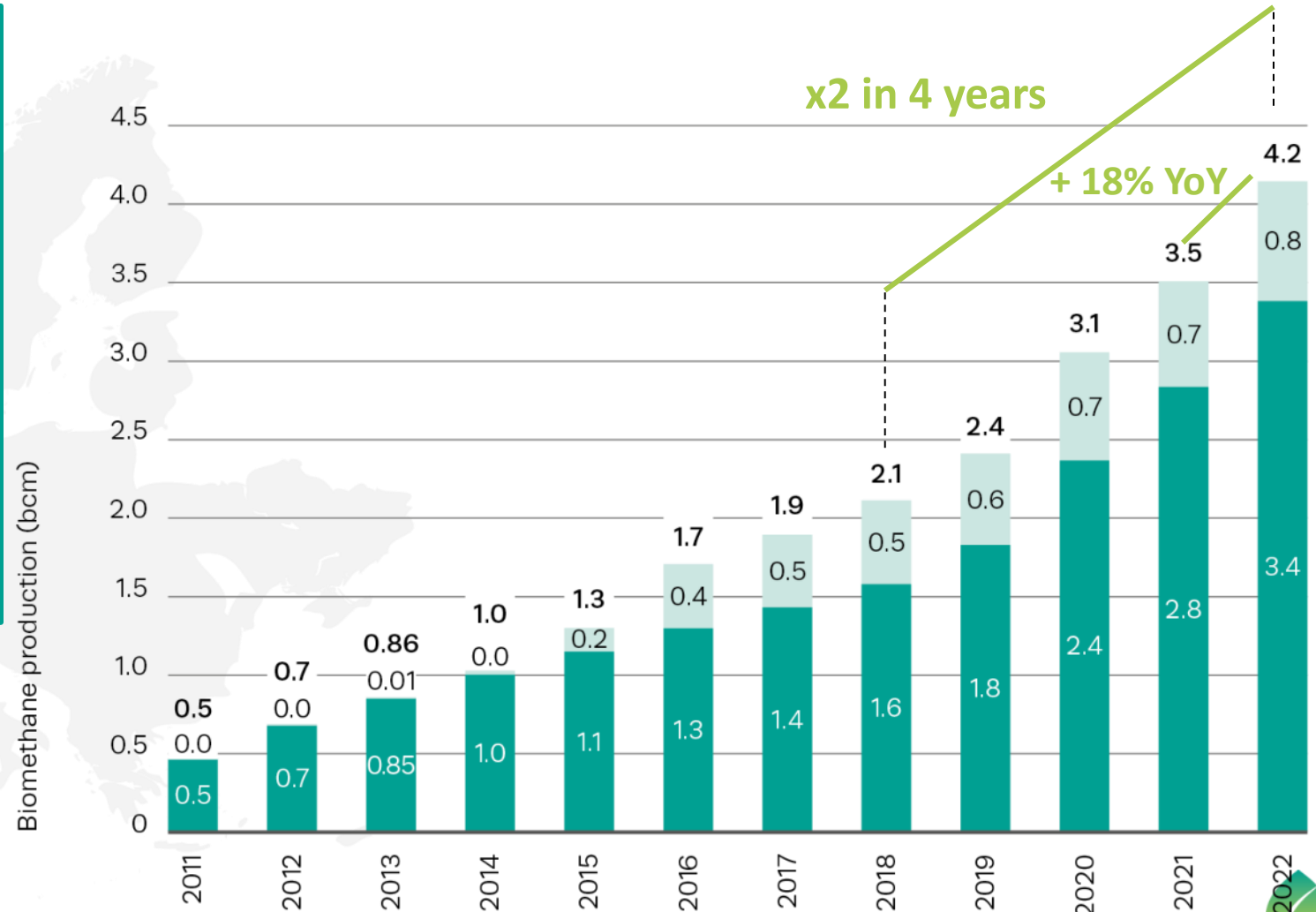
4.2 bcm (3.4 in EU-27)  
4.5 bcm installed capacity



x2 production since 2018  
France, Italy, Denmark, UK  
fastest growing countries

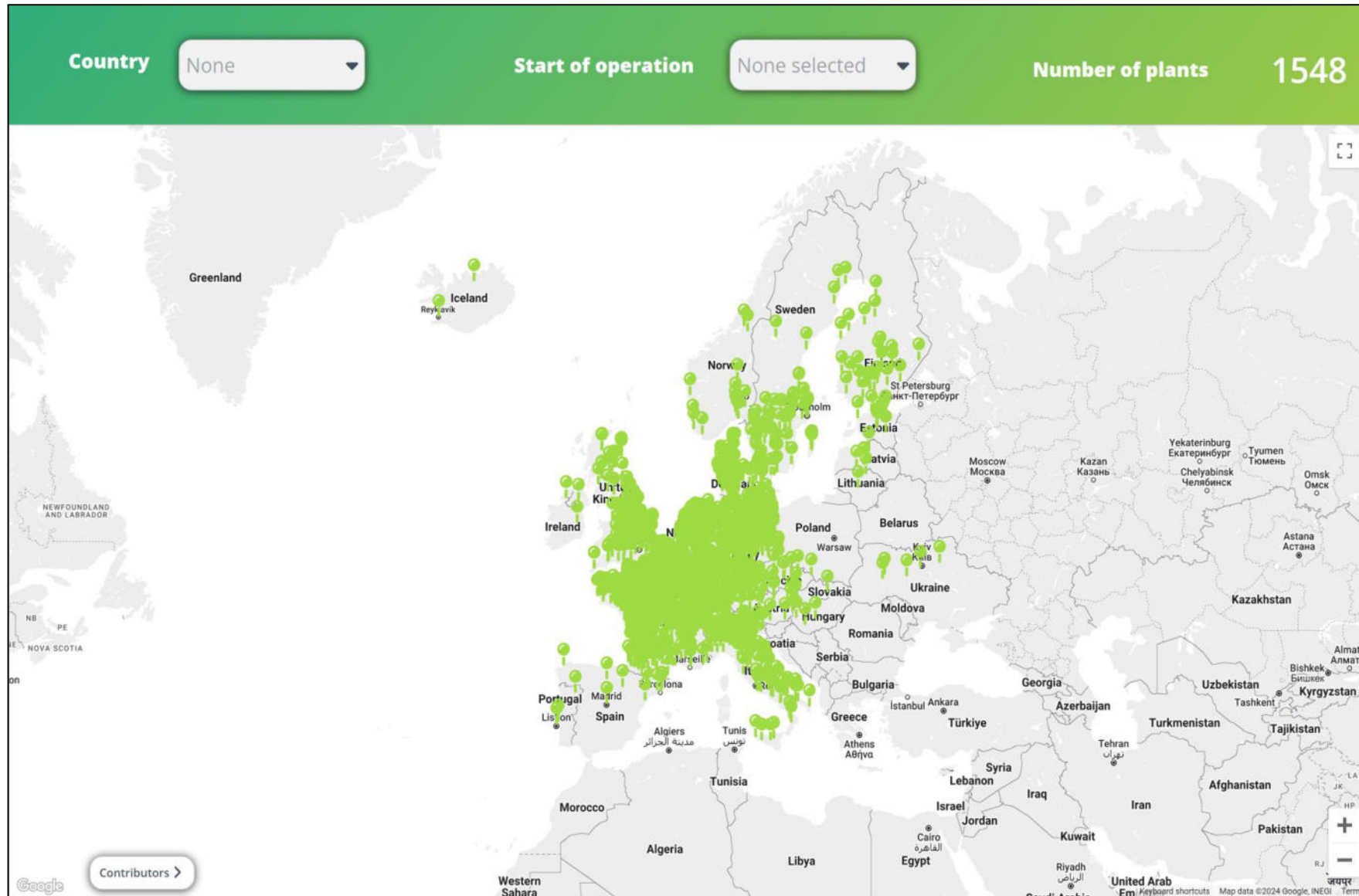


24 producing countries in  
2022



■ EU-27  
■ Europe

# European Biomethane Map 2024: 1,548 plants in operation



<https://europeanbiogas.clicdata.com/v/Yux1B2opYFdS>

# Statistics: installed capacity

	2024		2022
Germany	147,749	Germany	147,711
France	132,818	United Kingdom	107,029
United Kingdom	114,358	France	87,691
Italy	97,757	Denmark	70,105
Denmark	85,117	Sweden	45,421

Countries with the biggest biomethane installed capacities per year in 2024 vs 2022 (in Nm<sup>3</sup>/h)

	2024		2022	
	EU-27	Non-EU	EU-27	Non-EU
Installed capacity	5.2	1.2	3.8	1.0
% of total	81	19	79	21

Biomethane plant installed capacities in EU-27 and non-EU countries in 2024 vs 2022 (in bcm/year)

**Total installed capacity of biomethane plants:**

6.4 bcm/year

**Growth from EBA Biomethane Map 2022 data:**

32%

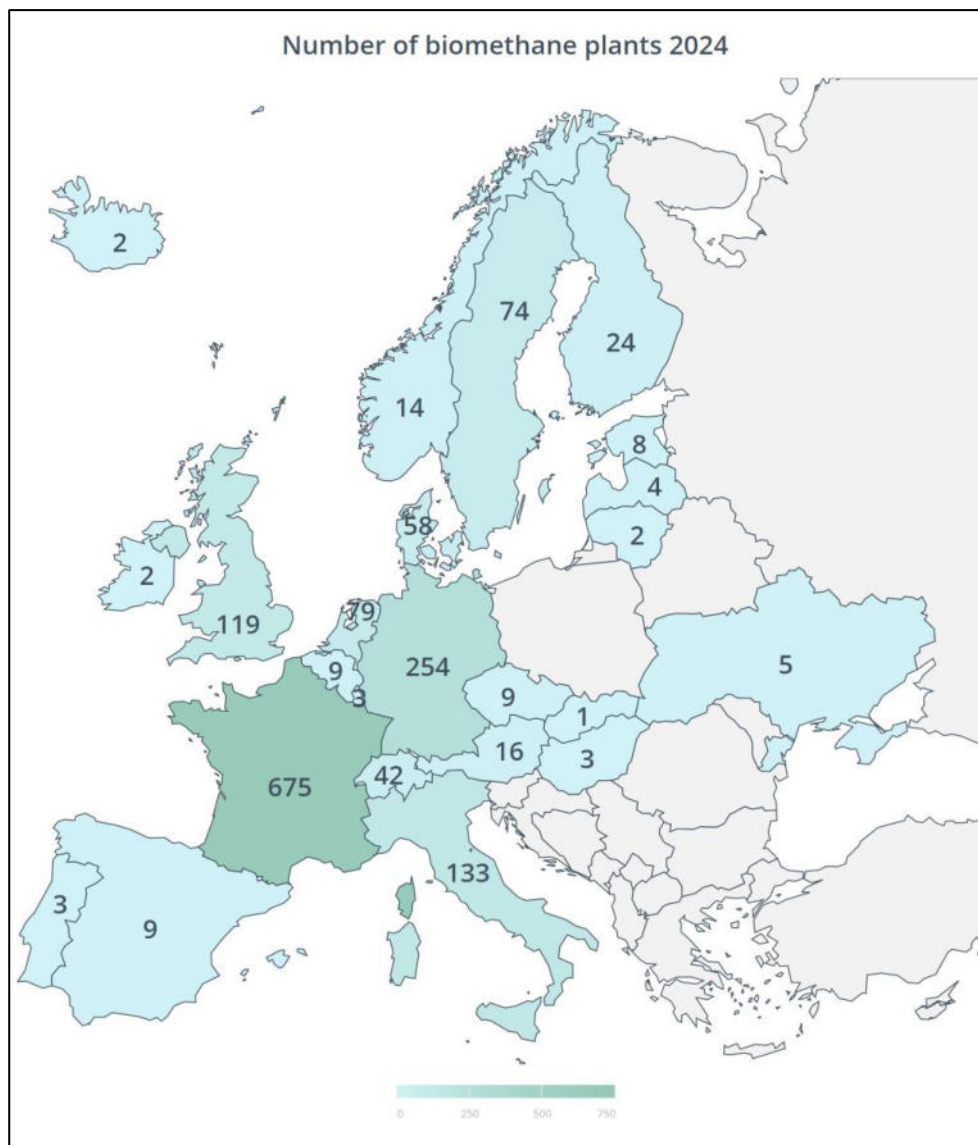
**Growth for EU-27:**

37%

**Growth for non-EU:**

20%

# Statistics: geographical distribution



## Countries with biggest growth in installed capacity:

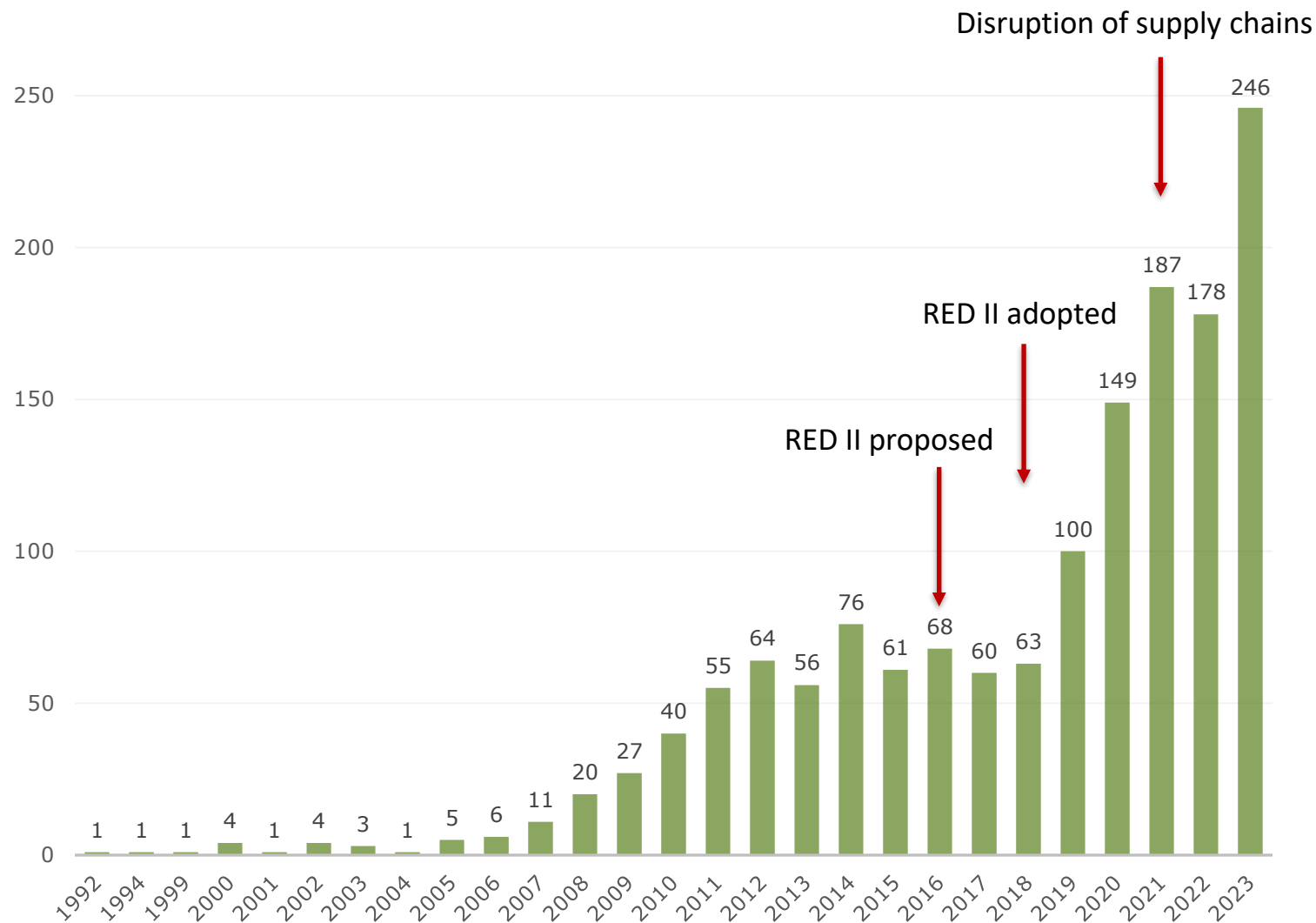
<b>Italy</b>	238%
<b>France</b>	51%
<b>The Netherlands</b>	23%

## Average biomethane plant in Europe:

**468 Nm<sup>3</sup>/h**



# Statistics: historical distribution



Number of biomethane plants (that are still operational) per their start of operation year

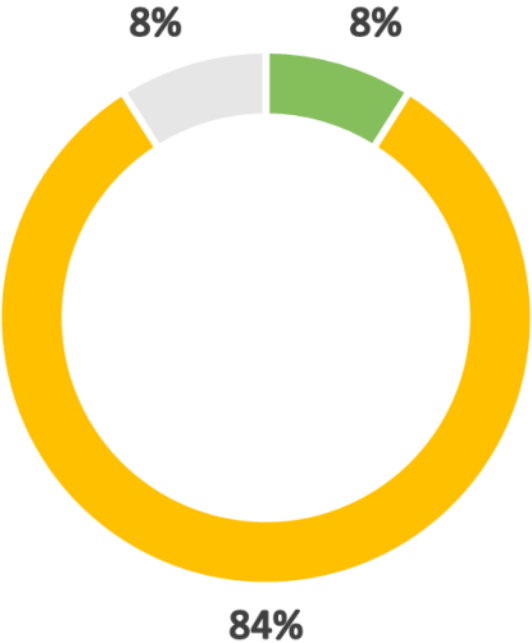
## Key takeaways:

- Noticeable increase after 2018 RED II adoption
- Increase despite disruption of supply chains in 2020–2022

**Identified new plants in 2024: 56**

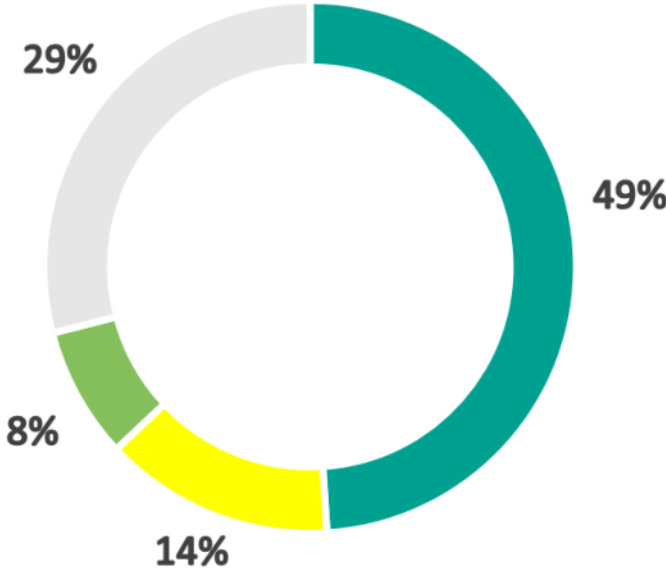
# EUROPEAN BIOMETHANE PLANS vs GRID CONNECTION

### INJECTING?



■ [no] ■ [yes] ■ [unknown]

### WHERE?



■ [distribution] ■ [transport] ■ [no connection] ■ [unknown]

## 2. BIOMETHANE 2030 - 2040

*Follow the Money*

*Follow the Plans*

# €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

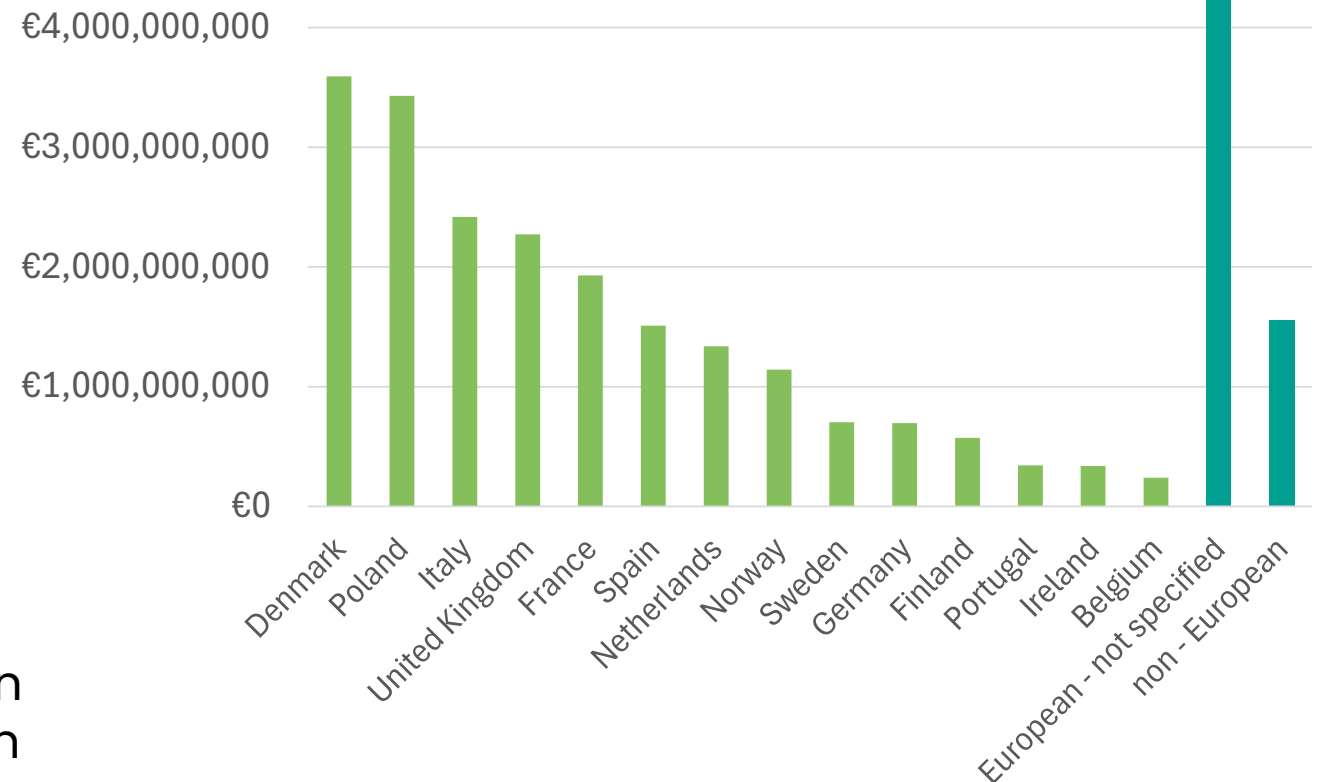
# Denmark, Poland and Italy are top countries for planned investments

## Top countries

Denmark	€ 3.6 billion
Poland	€ 3.4 billion
Italy	€ 2.4 billion
United Kingdom	€ 2.2 billion
France	€ 1.9 billion

## Other investment destinations

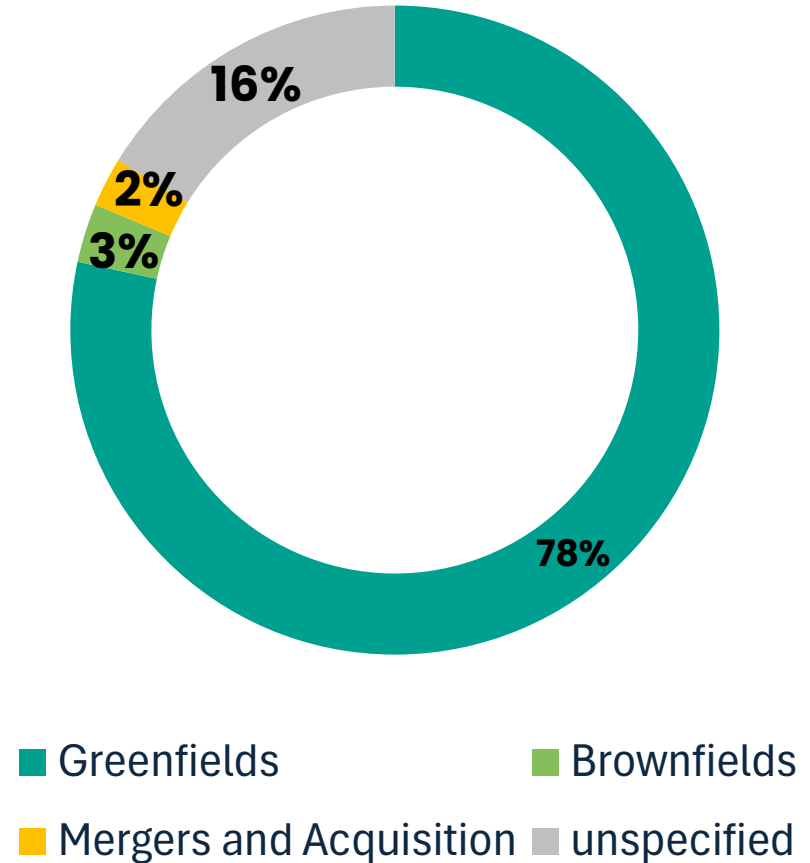
European (yet to be specified)	€ 4.5 billion
Non-European	€ 1.5 billion



*Geographical distribution of investment volumes*

# 78% of investments are for greenfields plants

- **€20.9 billion** planned for greenfield biomethane plants
- **€0.8 billion** reserved for brownfields
- **€0.7 billion** goes to mergers and acquisition



# Biomethane in the updated NECPs (national energy and climate plans)

## NECPs with 2030 biomethane target

Belgium	<b>0.11 bcm</b>
Czechia	<b>0.5 bcm</b>
Denmark	<b>0.4 bcm</b> (/100% green gas in grid)
Estonia	<b>0.04 bcm</b> (380 GWh)
France	<b>4.15 bcm</b> (44 TWh)
Greece	<b>0.2 bcm</b> (2.1 TWh)
Ireland	<b>0.58 bcm</b>
Italy	<b>5.7 bcm</b>
Lithuania	<b>0.13 bcm</b> (1.4 TWh)
Netherlands	<b>2 bcm</b>
Slovakia	<b>0.3 bcm</b>
Slovenia	<b>0.05 bcm</b> (480 GWh)

**TOTAL 14.16 bcm**

## Pre-NECP 2030 biomethane target (but no NECP target)

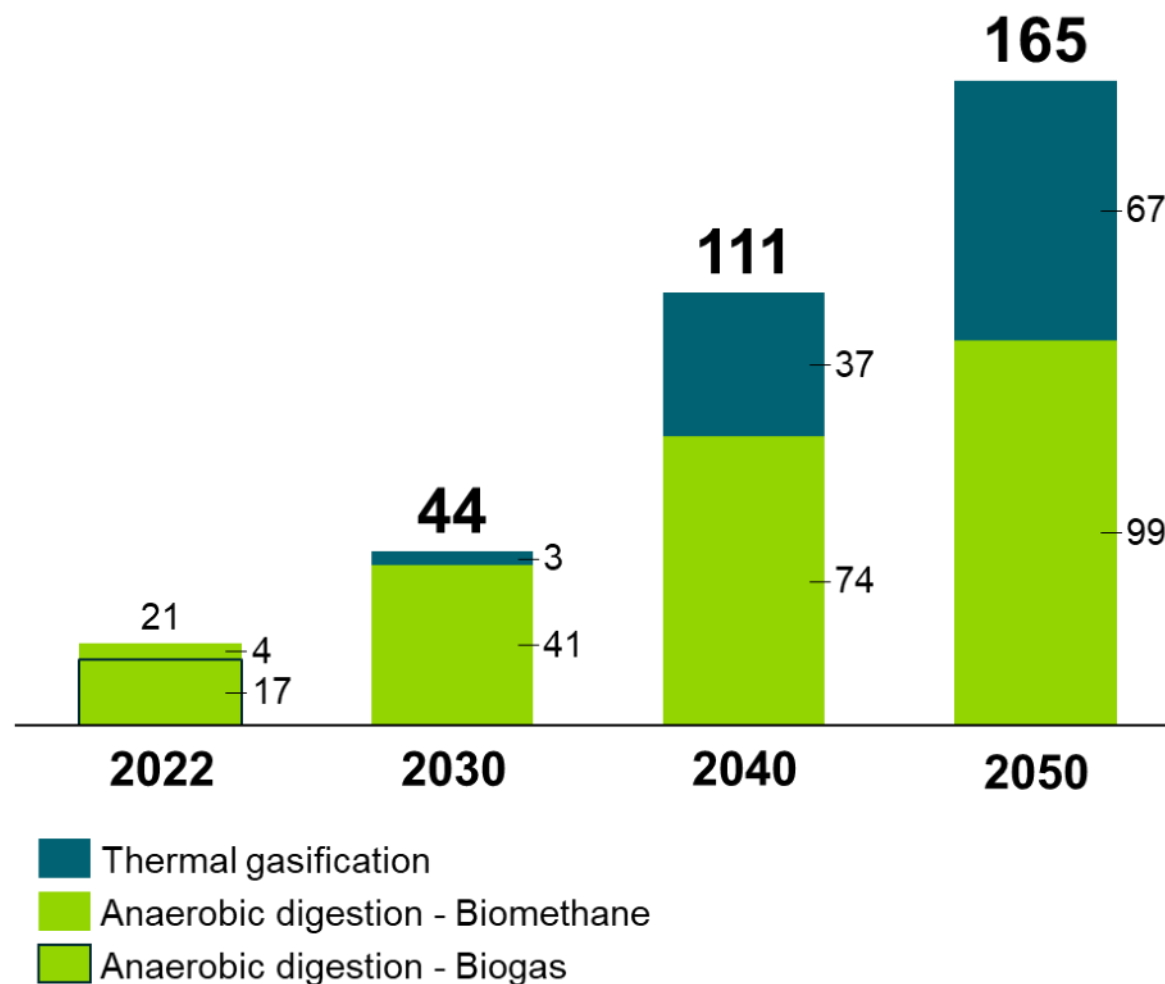
Austria	<b>0.39 bcm</b> (50% renewable gas target)
Finland	<b>0.38 bcm</b> (4 TWh)
Ireland	<b>0.58 bcm</b> (5.7 TWh)
Latvia	<b>0.09 bcm</b> (10% fossil natural gas)
Poland	<b>0.99 bcm</b> (50% renewable gas target)
Sweden	<b>0.94 bcm</b> (10 TWh)

**TOTAL 3.4 bcm**

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

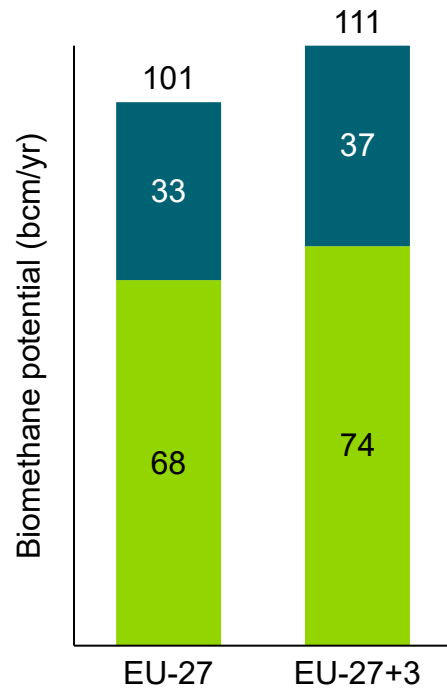
## Biomethane production potential in Europe

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

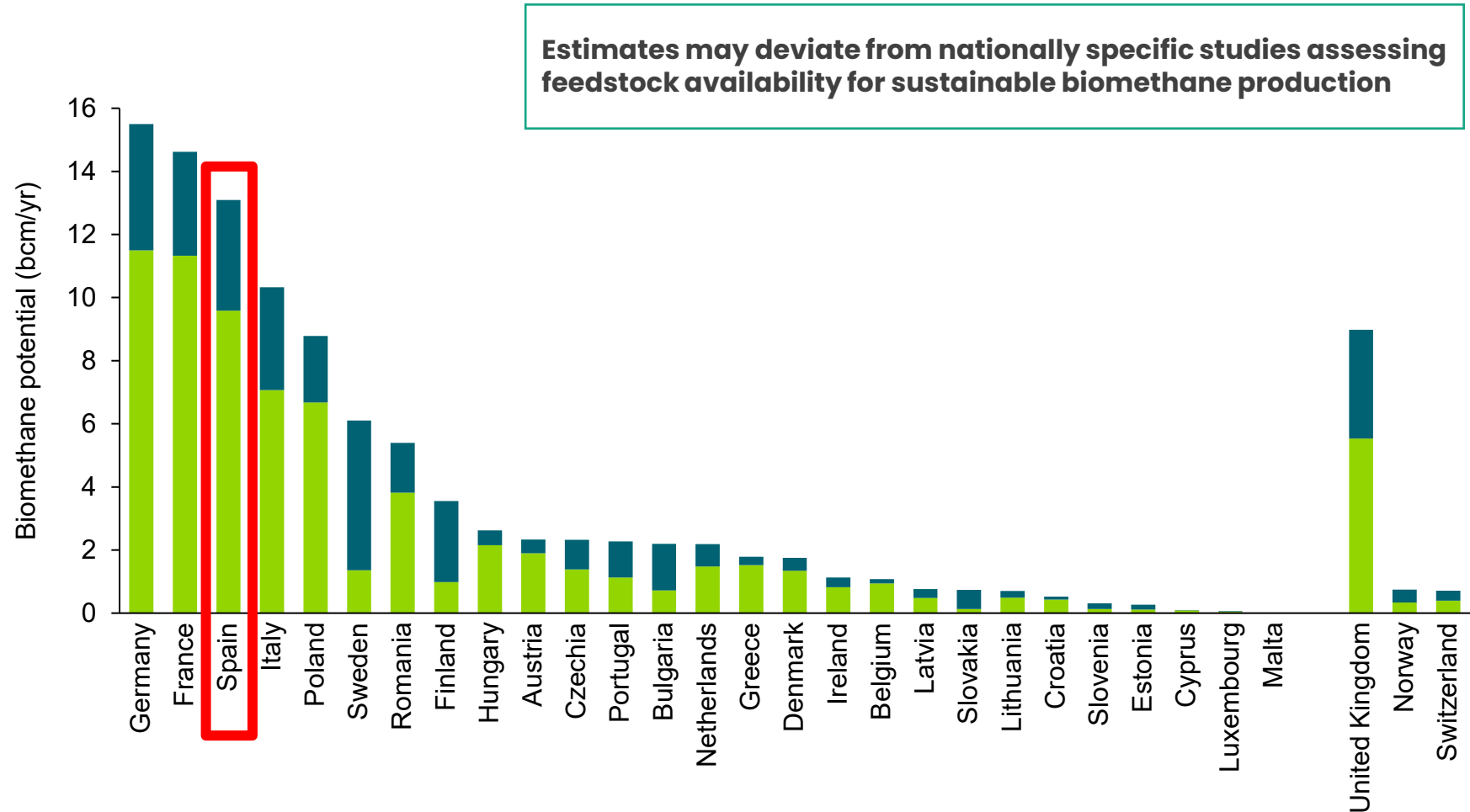




# Biomethane potential of 111 bcm/yr in Europe in 2040 – dominated by anaerobic digestion



■ Anaerobic digestion  
■ Thermal gasification



# Role of biogases in the European Commission's 2040 Climate Target Plan

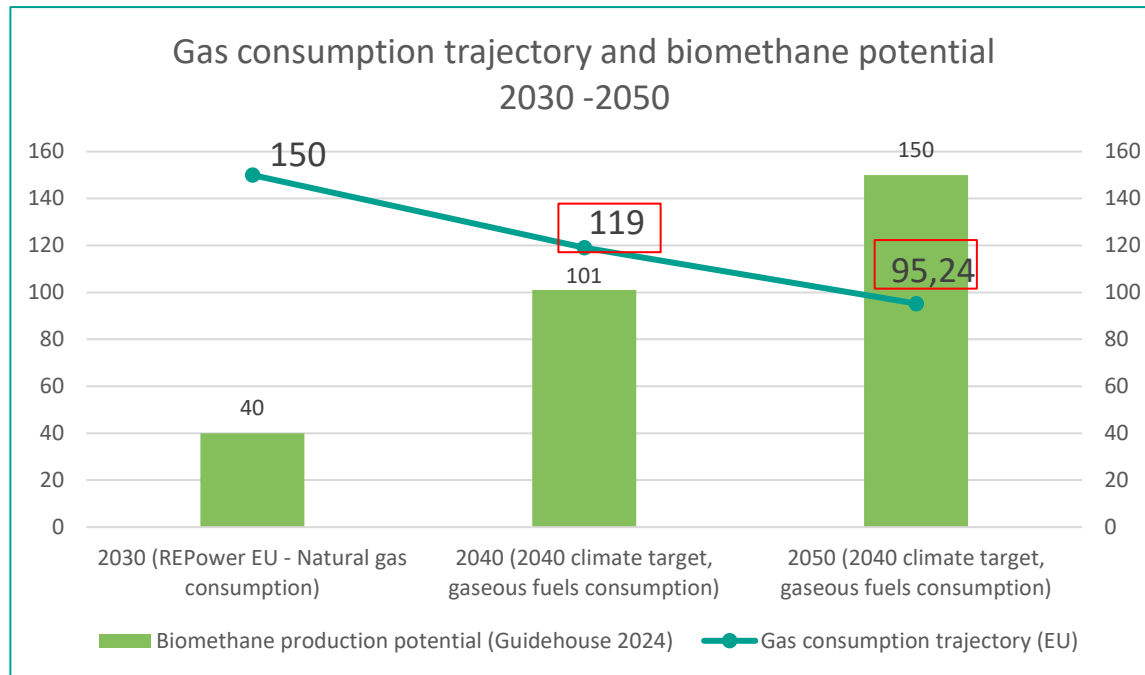
- European Commission's Communication *"Europe's 2040 climate target and path to climate neutrality by 2050 building a sustainable, just and prosperous society"* was presented on 6 February 2024.
- **A projection of the evolution of the EU energy mix and related GHG emissions with climate neutrality in 2050 as ultimate goal.**
- **Suggests the EU's GHG reduction target for 2040 as an interim target towards climate neutrality by 2050 → reduction of 90% compared to 1990.**
- **No binding value** - intended to be the political legacy of the Commission.



# Role of biogases in the European Commission's 2040 Climate Target Plan

The Target Plan foresees a reduction in grid-injected gaseous fuels to 119 bcm by 2040

(Natural gas, e-methane, biomethane)



Biomethane's role is focused on maritime transport, industry and agriculture



- 8% of transport fuels in 2040. 16% in 2050
- EC projected 19 TWh biomethane in maritime transport in 2030. Focus on maritime likely to continue



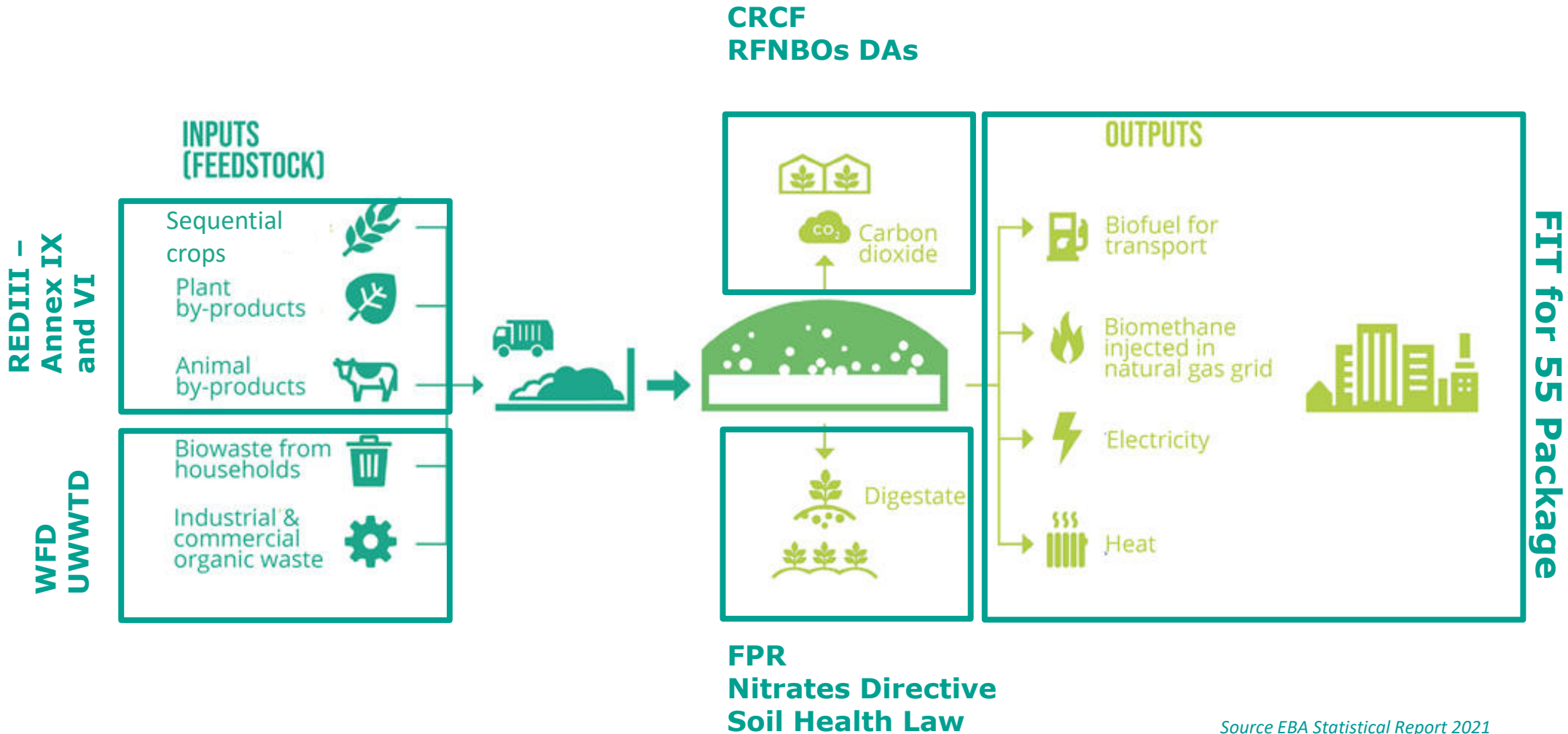
- "Bioenergy" = approx. 465-580 TWh in 2040
- This includes solid biomass, biogases, biofuels and organic solid waste



- Anaerobic digestion to mitigate emissions from manure
- Nutrient loss prevention (digestate)

# 3. WHAT TO EXPECT FROM THE NEW INSTITUTIONAL CYCLE

# AN EXTRAORDINARILY REGULATED SECTOR



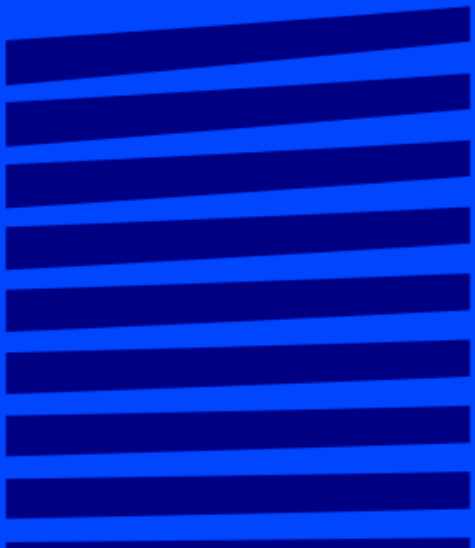
Source EBA Statistical Report 2021



# EUROPE'S CHOICE

POLITICAL GUIDELINES  
FOR THE NEXT EUROPEAN COMMISSION  
2024–2029

**Ursula von der Leyen**  
*Candidate for the European Commission President*



## UvL II

PROSPERITY

SIMPLIFICATION

DEFENCE

SOCIETY

QUALITY OF LIFE (FOOD + ENVIRONMENT)

LEADERSHIP

18 July 2025

# The future of European competitiveness

Part A | A competitiveness strategy for Europe

SEPTEMBER 2024

## DRAGHI'S REPORT



3 Action Areas:

- 1** Europe must refocus its collective efforts in closing the innovation gap with US and PRC
- 2** Joint plan for decarbonisation and competitiveness
- 3** Increasing security and reducing dependencies

# WHAT IS STANDING IN THE WAY?



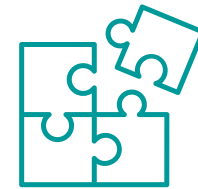
## **Europe is lacking focus.**

Common objectives, but not backed by setting clear priorities or following up with joined-up policy actions.



## **Europe is wasting its common resources.**

Large collective spending power, diluted across multiple different national and EU instruments



## **Europe does not coordinate where it matters.**





# THE NEW EC TEAM:

« It's the economy, stupid! »

Competitiveness  
Industry  
Many overlaps

# THREE POLICIES TO WATCH FOR in 2024-2029



## COMMON AGRICULTURAL POLICY

Largest single EU spending in the EU budget

Feedstock

Machinery and Capital Costs

On-farm



## ENERGY AND CLIMATE TARGET 2040

Revision of EU energy governance

Target settings for 2040 for:

Renewables  
Energy Efficiency  
Infrastructure  
GHG emissions savings



## INDUSTRIAL CARBON MANAGEMENT

Ensuring Uptake of NETs

EC already evaluating potential of BioCO<sub>2</sub> production

Unlocking value of BioCO<sub>2</sub> market

## AGRICULTURE AND MARITIME POLICY

EUR 385.77 billion

+8.07 from NGEU

European Agricultural Guarantee Fund  
291.09

European Agricultural Fund for Rural Development  
87.44 +8.07 from NGEU

European Maritime, Fisheries and Aquaculture Fund  
6.11

# THANK YOU!

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