

# BIOMETHANE IN EUROPE'S DECARBONISATION STRATEGY

**International Energy Agency, 20 November 2024**  
**Harmen Dekker, EBA's CEO**

# EBA – representing the full value chain



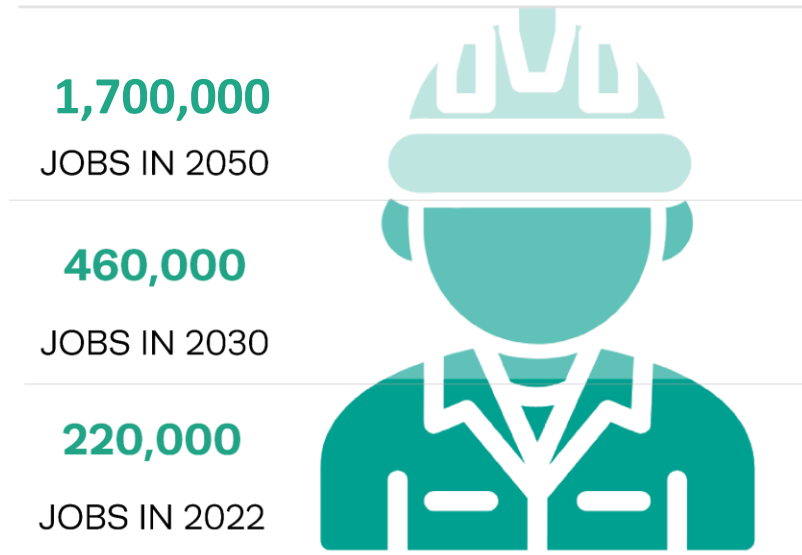
≥ 300  
MEMBERS

250  
COMPANIES

50  
NATIONAL ASSOCIATIONS

35  
COUNTRIES

# Socio-economic impact of biogases value-chain



15,000 COMPANIES



€ 5.75 BN TURNOVER



Every euro invested in biogases will remain in the European economy and provide an **additional value of 50% before 2030** that will also stay within our economy.

**A new institutional cycle**

# EU renewable energy targets for 2030: the RED III Directive

## **BUILDINGS** **49%**

Indicative target,  
measures justified  
in NECPS

**0.8 pp/y 2021–2025**

**1.1 pp/y 2026–2030**

## **2030 OVERALL EU RES TARGET**

**42.5%**

**+ 2.5%**

## **TRANSPORT**

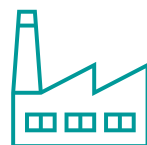
**29% or**



**14.5%**

**GHG intensity**

Mandatory target,  
measures justified  
in NECPS

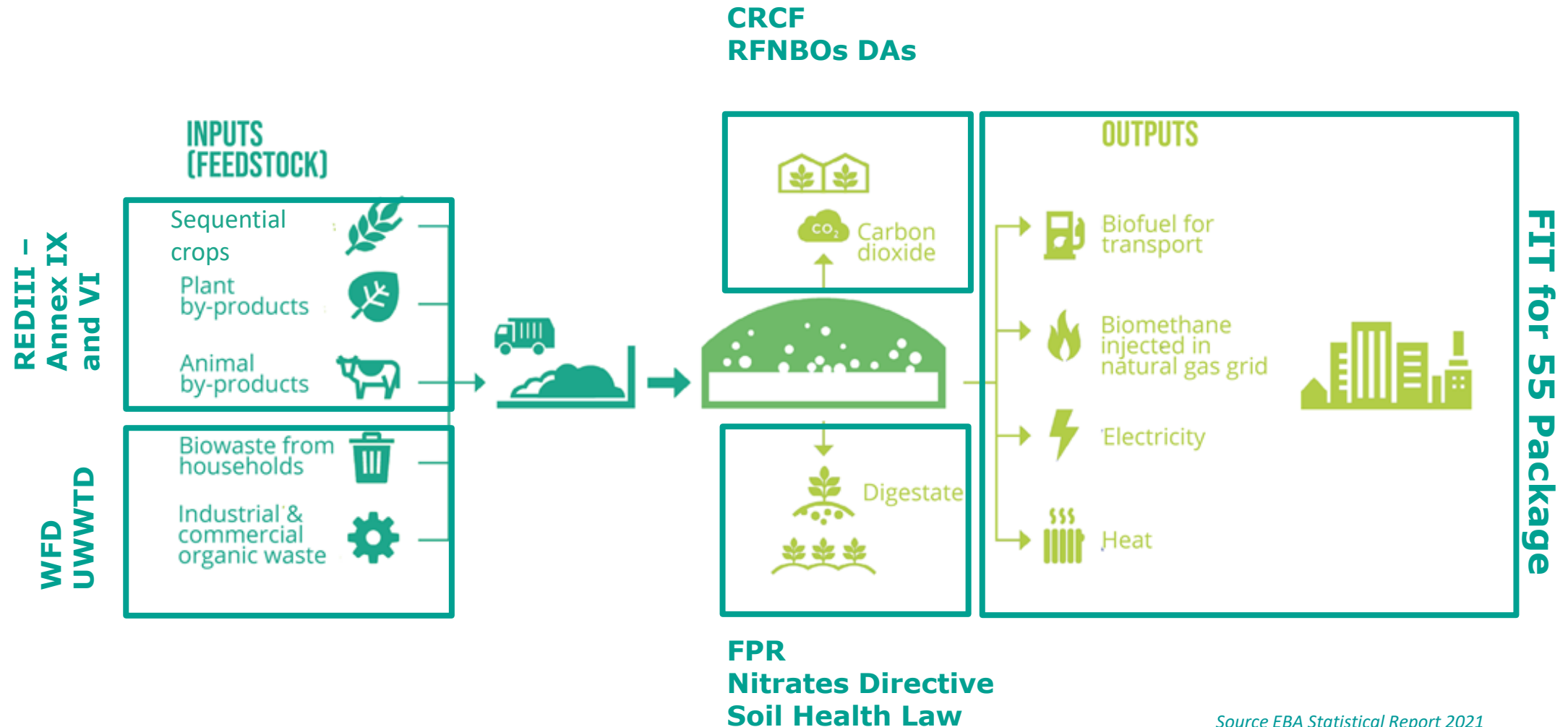


## **INDUSTRY**

**1.6 pp/year**

Indicative target + subtargets  
RFNBOs / H<sub>2</sub> > 42%

# An extraordinarily regulated sector



Source EBA Statistical Report 2021



# Repowering the EU with 35 bcm of biomethane



## Focus on biomethane:

- Biomethane Action Plan including:
  - **Biomethane Industrial Partnership**
  - Specific target for biomethane deployment: **35 bcm by 2030**



**Objective:** measures facilitating the increase in production of biogas and boost its subsequent conversion into biomethane, respecting criteria agreed in the REDII.



### PLANNING

Anchoring the 35 bcm in legislation and making sure that there are solid trajectories and milestones to achieve the target



### MARKET

Ensuring easy market access, cutting away red tape and eliminating persisting internal market barriers



### FINANCE

Using dedicated and innovative finance instruments to mitigate risks and have the needed capital to roll out biomethane at scale



### SUSTAINABLE FEEDSTOCKS

Tap into sustainable resources such as waste, urban wastewater and sustainable crops

# 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



# **Biomethane today**

# Biomethane is growing: X2 in 4 years

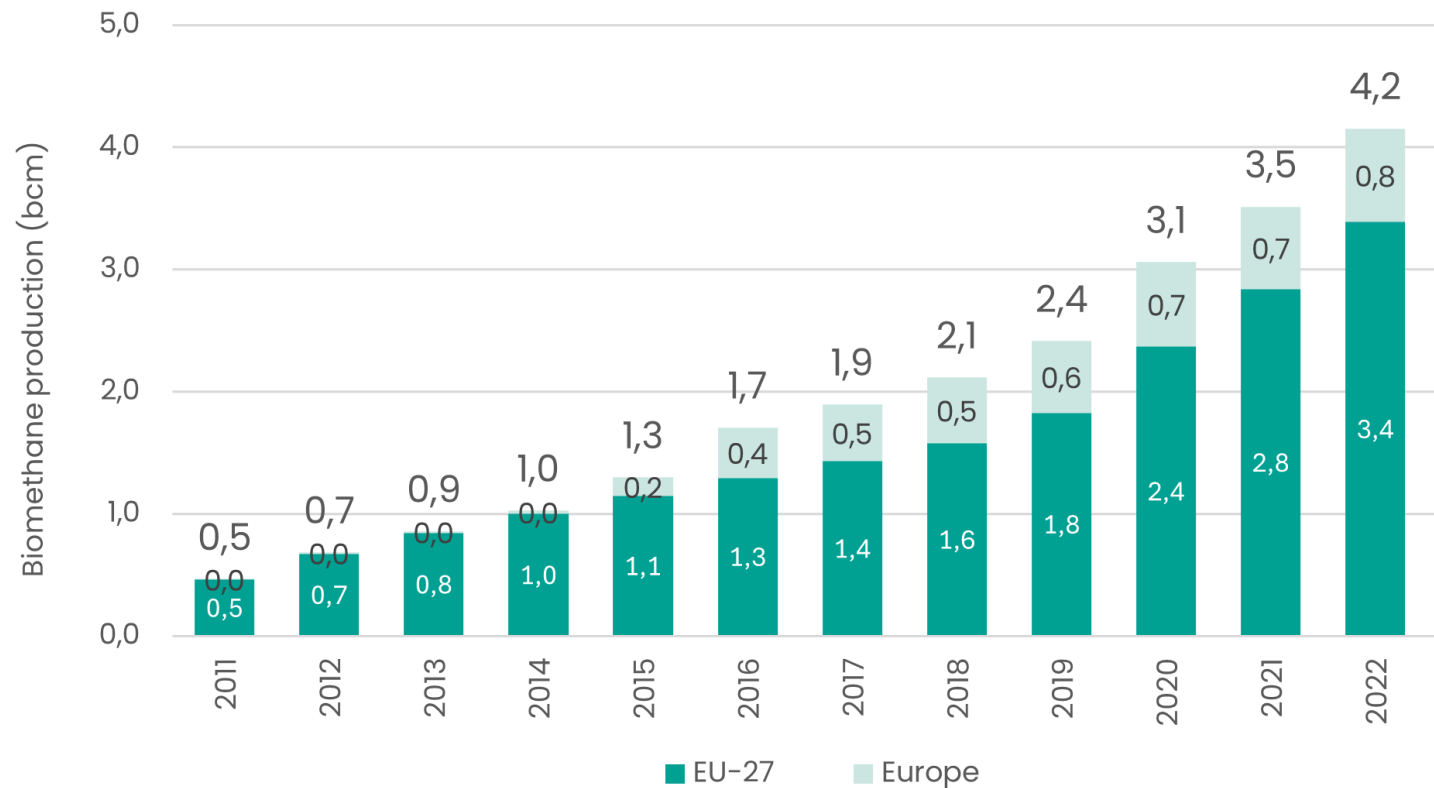
## Biomethane production in EU & Europe

### x2 production since 2018

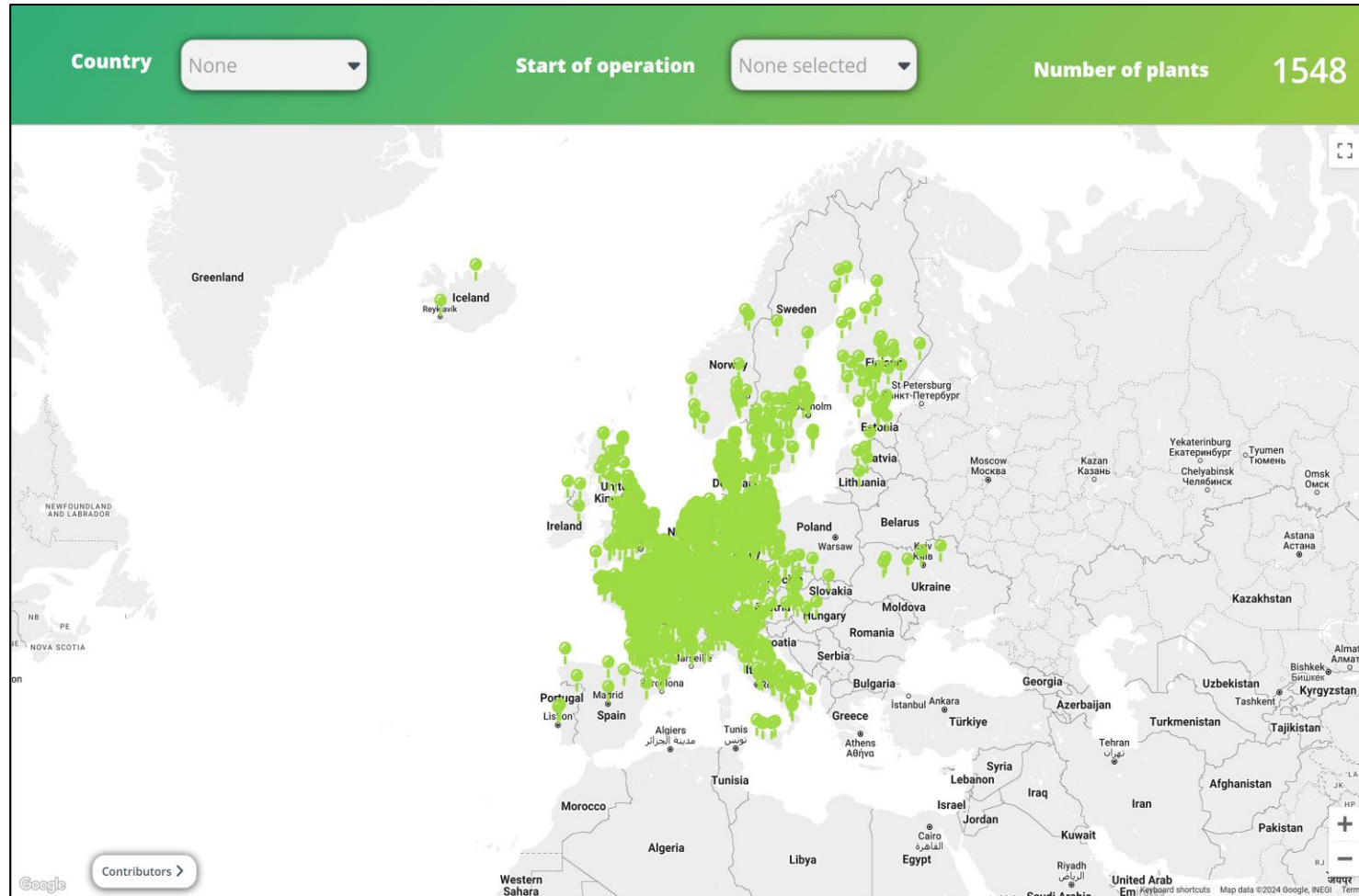
France, Italy, Denmark, UK  
fastest growing countries

### 24 producing countries

France, Italy, Denmark, UK  
fastest growing countries



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



**Total installed capacity of biomethane plants: 6.4 bcm/year**

**Growth for EU-27: 37%**

**Growth for non-EU: 20%**

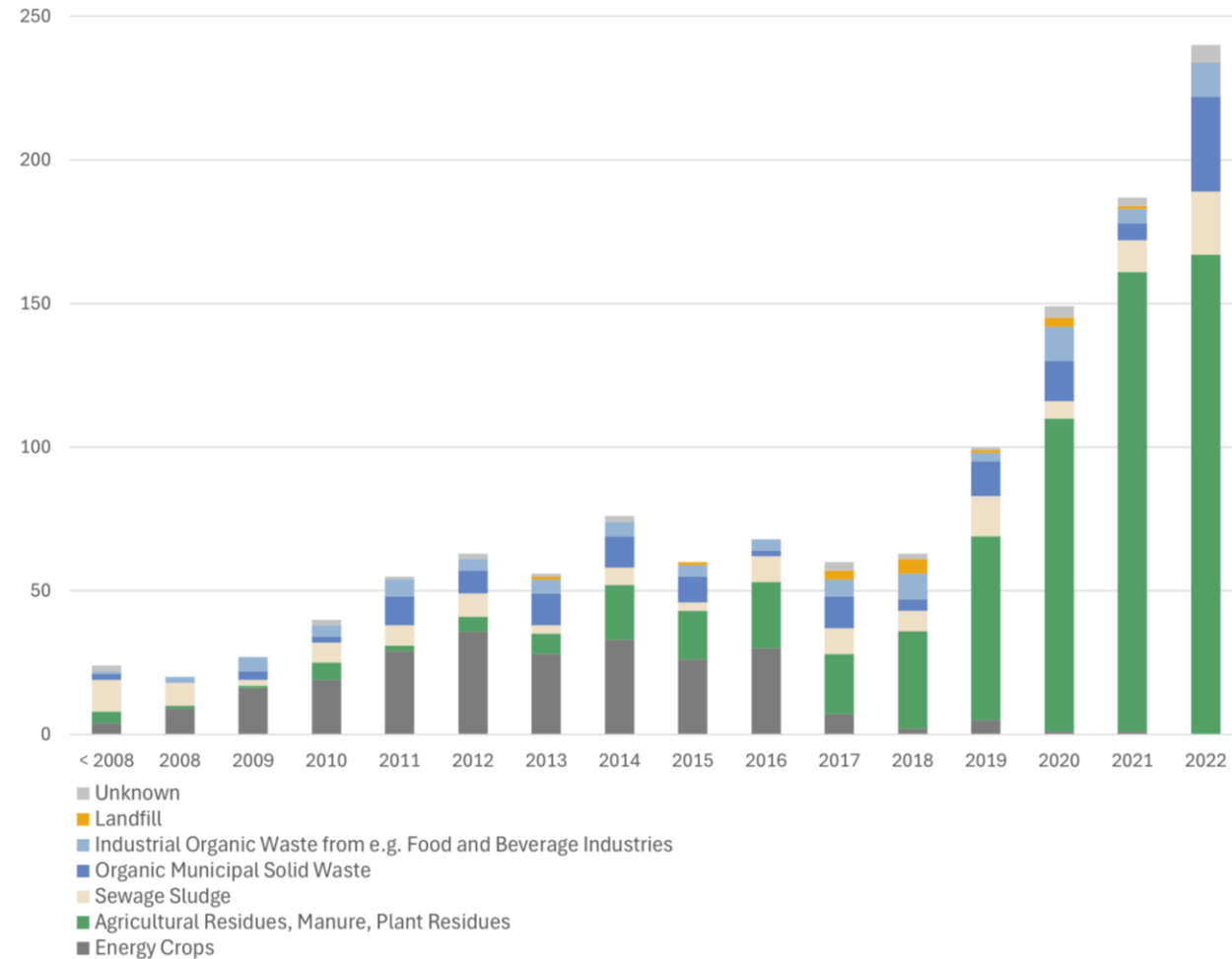


# Transition towards sustainable feedstocks in Europe's biomethane plants

## New installed biomethane plants between 2008–2023, per feedstock type

Since 2017, almost no new plants were established to run on monocrops.

Instead, new plants are being built to run on agricultural residues, organic municipal solid waste, sewage sludge and industrial waste.



# Biomethane: a versatile renewable fuel

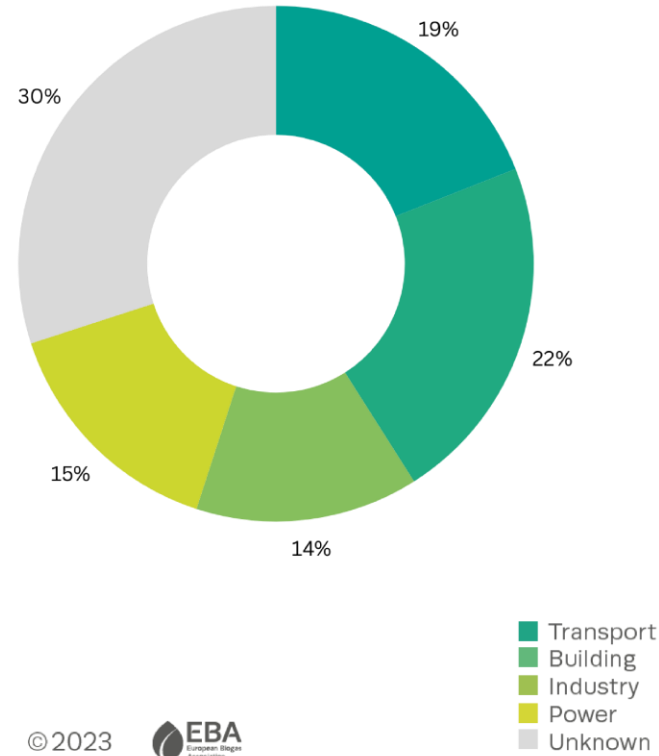
## Percentage of biomethane used per sector overall and per country

### End-uses depend on country

Transport



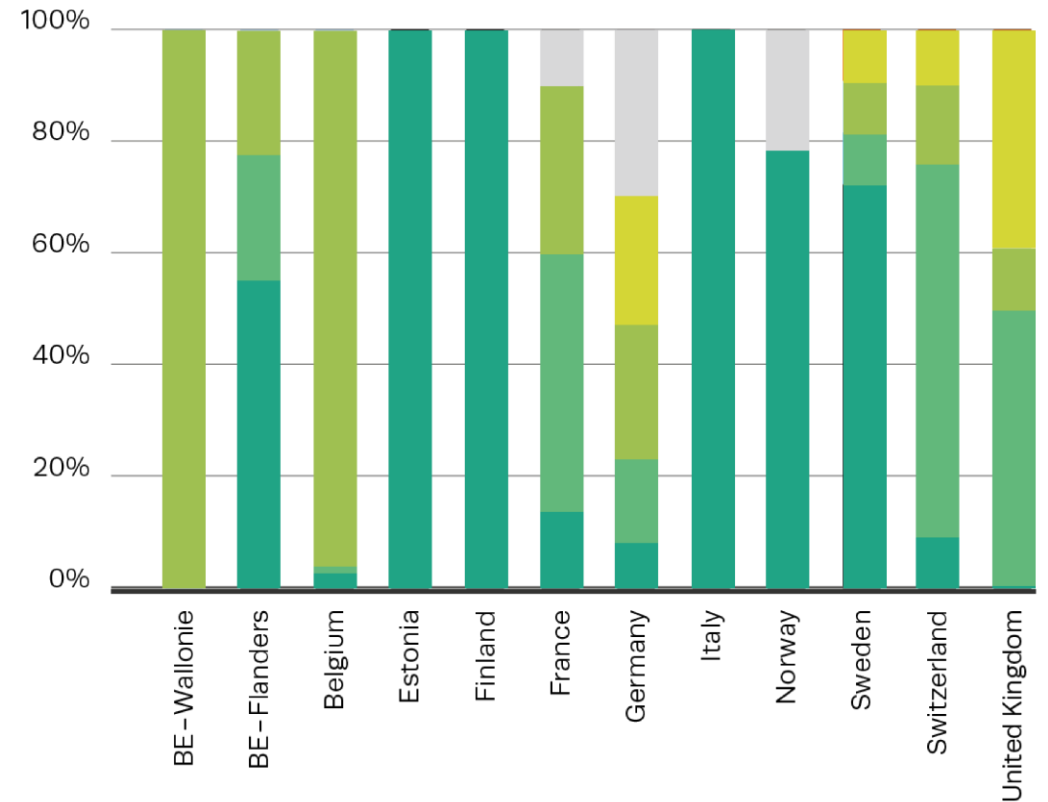
Heating or electricity



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■ Transport  
■ Building  
■ Industry  
■ Power  
■ Unknown

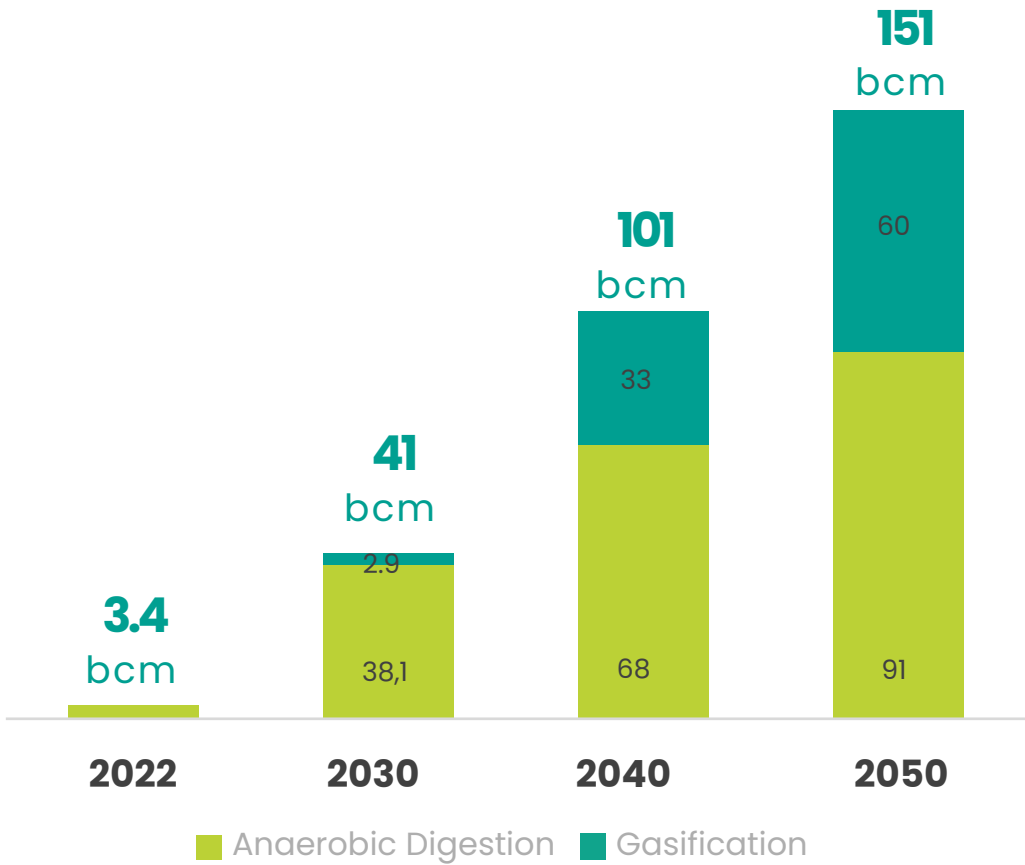


# **Biomethane 2030-2040**



# Enabling a resilient transition

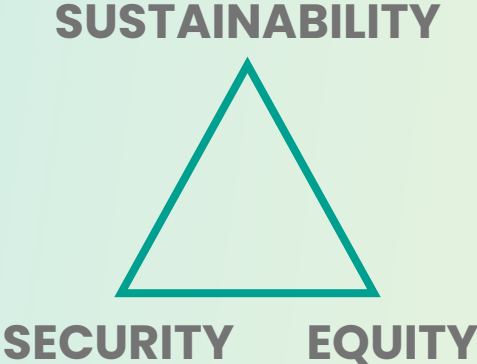
Production potential in EU-27 until 2050 compared to existing production (bcm)



Sources: EC, Impact Assessment Report, SWD(2024) 63 final (2024), EBA, Statistical Report 2023 (2023); Gas for Climate, Biomethane Production Potentials in the EU (2022); Guidehouse, Biogases towards 2040 and beyond (2024).

## 2040

Biomethane production could supply **85%** of gaseous fuels demand



Balancing the **ENERGY TRILEMMA** while responding to great societal challenges: waste management, farming emissions abatement, affordability.

# Biomethane Investments

**€27 Billion**  
**earmarked to be invested in biomethane**

**6.3 bcm**

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

# THANK YOU!

Harmen Dekker [dekker@europeanbiogas.eu](mailto:dekker@europeanbiogas.eu)

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# WEBINAR

**Dig Deep!**

EBA Statistical Report 2024 unveiled:  
key market trends from the biogas  
and biomethane industries in Europe



**Register now!**

**4 DECEMBER 2024**  
10h-11h15 AM



Supported by



# WEBINAR

**Dig Deep!**

Diversifying biomethane production:  
Gasification potential unlocked

**12 DECEMBER 2024**  
10h-11h30 AM



[info@europeanbiogas.eu](mailto:info@europeanbiogas.eu)  
[www.europeanbiogas.eu](http://www.europeanbiogas.eu)

