

# European Market Update

**2<sup>nd</sup> Forum of the Polish Biomethane Forum  
+ Study Tour**

**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
- Recommendation to sustain acceleration

# EBA in a nutshell






# Key figures on the biomethane market in Europe




# 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

# 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: number of plants

	2024		2022
France	675	France	477
Germany	254	Germany	254
Italy	133	United Kingdom	106
United Kingdom	119	Sweden	72
The Netherlands	79	The Netherlands	70

Countries with the largest number of plants in 2024 vs 2022

	2024		2022	
	EU-27	Non-EU	EU-27	Non-EU
Number of plants	1,364	184	1,023	151
% of total	88	12	87	13

Biomethane plants in EU-27 and non-EU countries in 2024 vs 2022

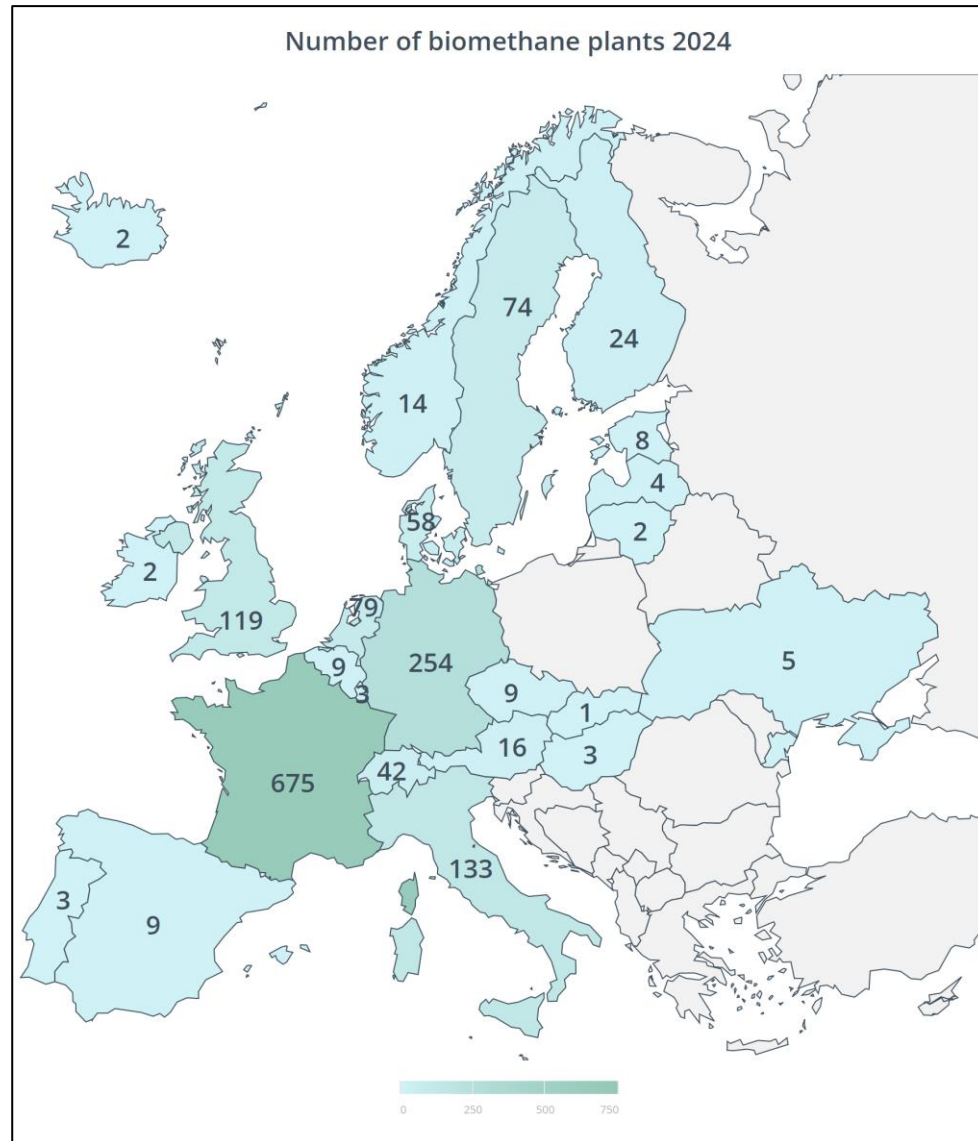
**Total number of biomethane plants:**  
1548

**Growth from previous EBA map:**  
32%

**Growth for EU-27:**  
33%

**Growth for non-EU:**  
22%

# Statistics: geographical distribution



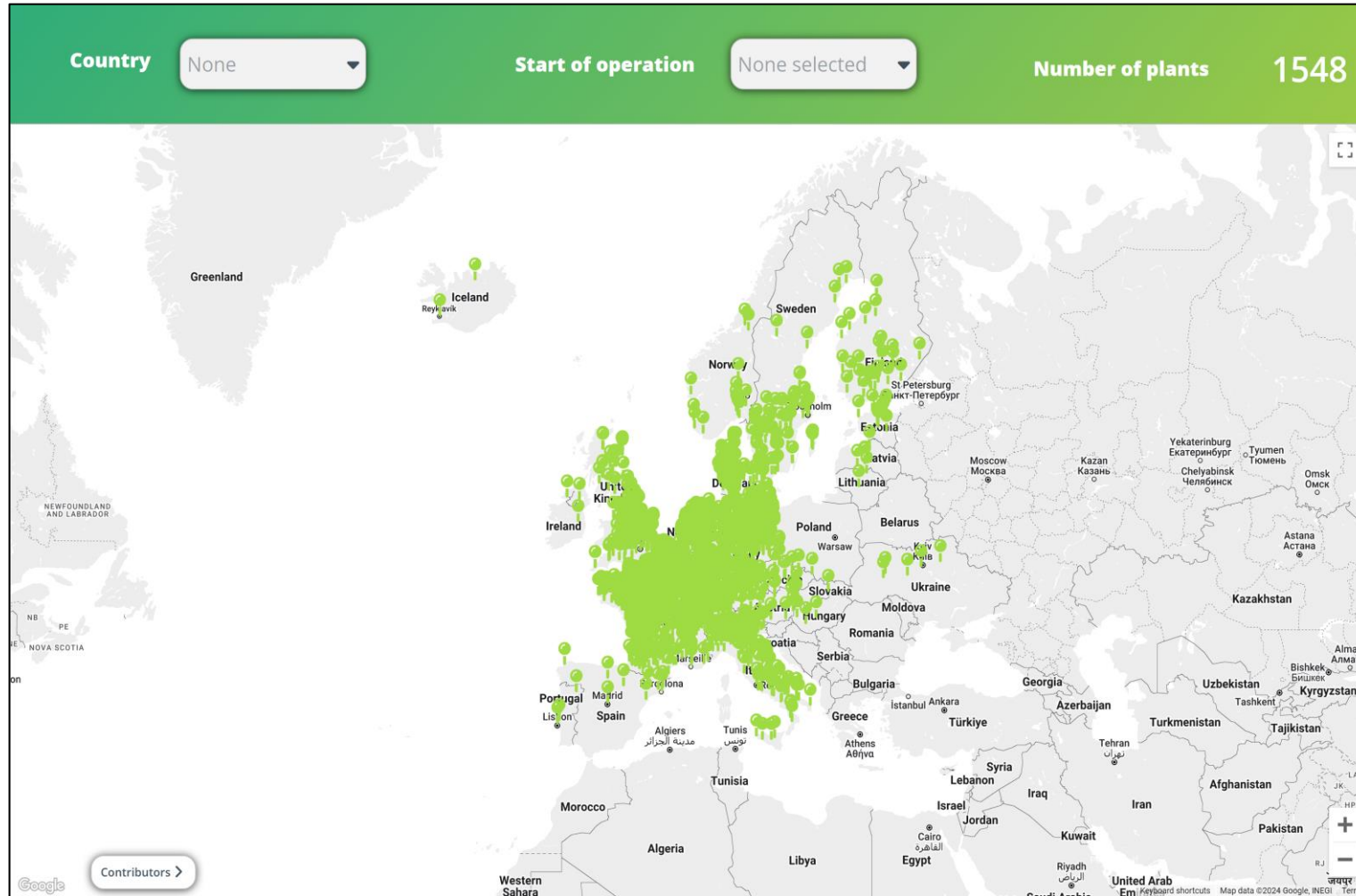
## Countries with biggest growth in installed capacity:

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

## Average biomethane plant in Europe:

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

# 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 Nm<sup>3</sup>/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

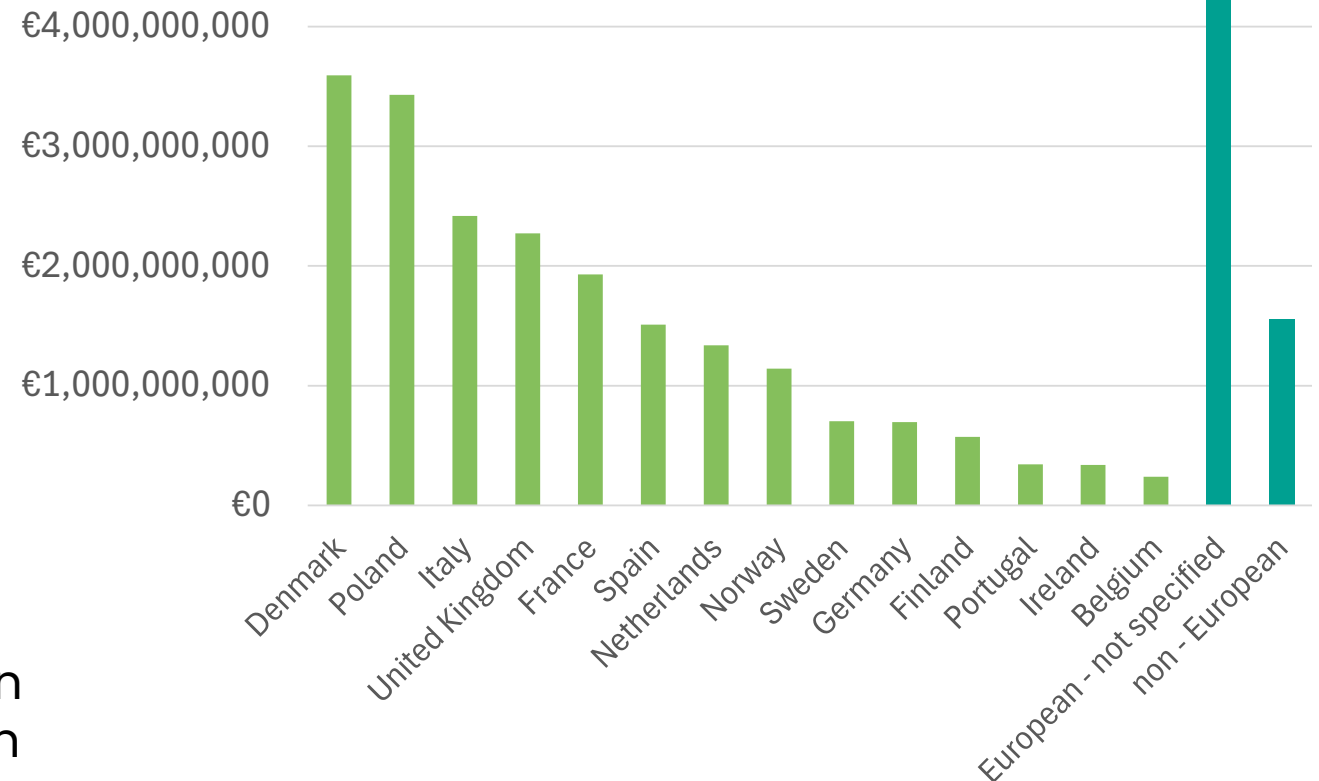
# Denmark, Poland and Italy are top countries for planned investments

## 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*

# Important newcomers in the European biomethane market

- **Denmark, Italy and Poland** have the highest foreseen added capacities
- **Poland, Spain, Portugal and Ireland** important new markets
- **€4.5 billion** and **8.9 TWh/year** of capacity is yet to be allocated

	Investment volume	Foreseen capacity
Denmark	€3.6 billion	9.8 TWh/year
Poland	€3.4 billion	7.8 TWh/year
Italy	€2.4 billion	8.8 TWh/year
The United Kingdom	€2.3 billion	7.6 TWh/year
France	€1.9 billion	4.7 TWh/year
Spain	€1.5 billion	5.7 TWh/year
Netherlands	€1.3 billion	4.5 TWh/year
Norway	€1.1 billion	2.4 TWh/year
Sweden	€0.70 billion	1.5 TWh/year
Germany	€0.70 billion	1.9 TWh/year
Finland	€0.57 billion	1.3 TWh/year
Portugal	€0.34 billion	1.1 TWh/year
Ireland	€0.34 billion	1.4 TWh/year
Belgium	€0.24 billion	0.9 TWh/year
Europe – not further specified	€4.5 billion	8.9 TWh/year
Non - European	€1.5 billion	4.5 TWh/year

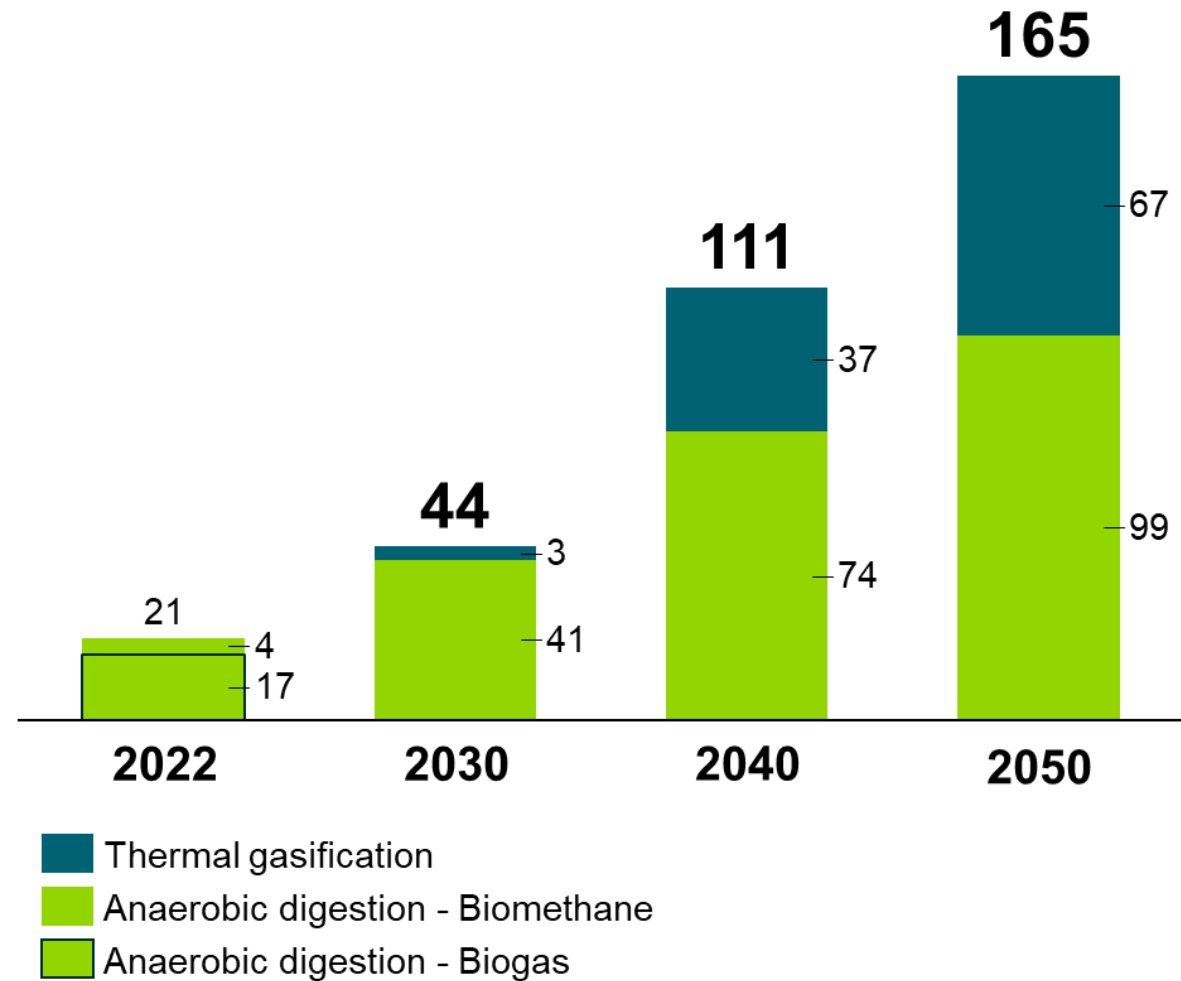
# Future potential of the biomethane market



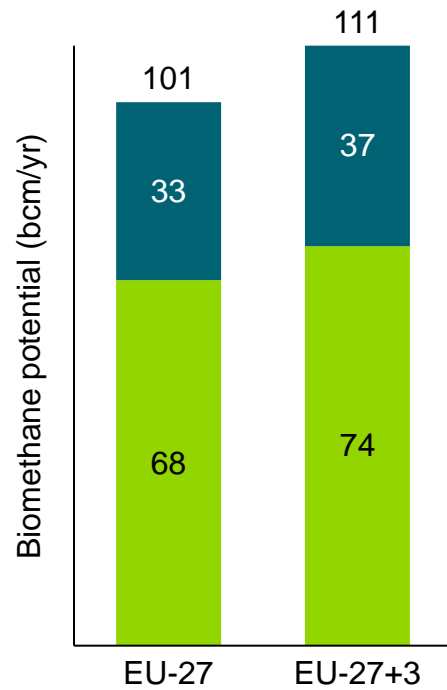
# Significant potential to scale-up biomethane production to 2040 and beyond (Guidehouse study)

## Biomethane production potential in Europe

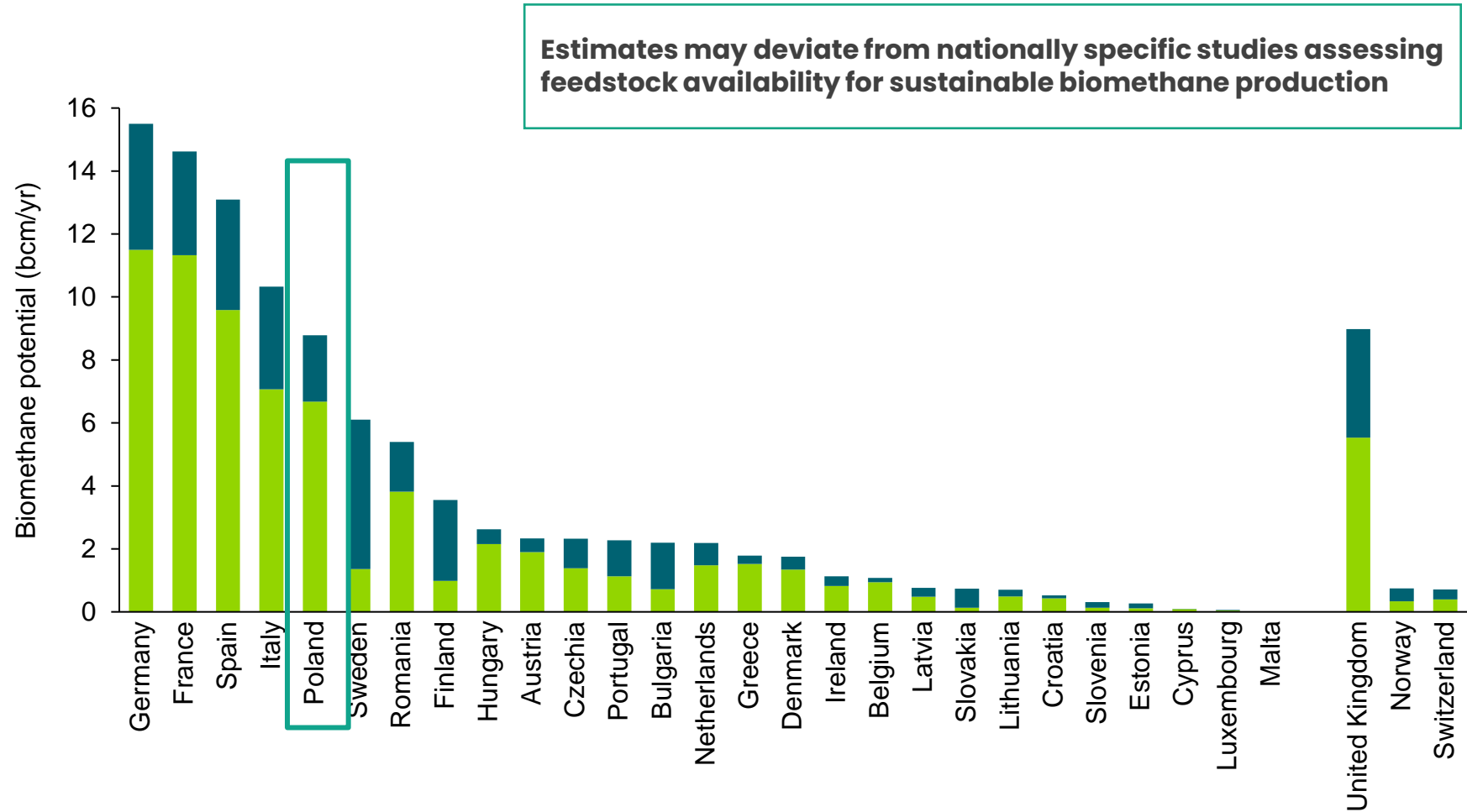
- 44 bcm by 2030
- 111 bcm by 2040
- 165 bcm by 2050



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



■ Anaerobic digestion  
■ Thermal gasification



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

- **2040 AD potential in Europe:**

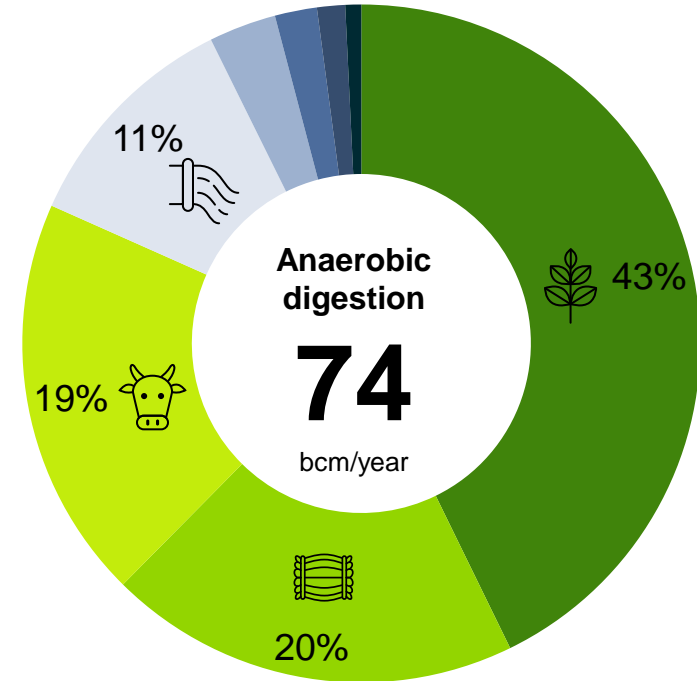
- 74 bcm/yr in Europe

- **Main feedstocks:**

- Sequential cropping
- Agri residues
- Manure
- Industrial wastewater

- **Top 5 countries:**

- Germany
- France
- Spain
- Italy
- Poland



# Legislation: Access of biomethane to markets



# 4 recommendations to sustain the acceleration



- **Provide long-term targets**
- **Create demand pull from all sectors**
- **Ensure solid planning frameworks**



**Fast implementation of H2 Hydrogen and Decarbonised Gas Market Package.**



- **Biomethane at the heart of circularity**
- **Development of synergies**



- **Biomethane Accelerator**
- **Taxonomy fit for a cross-cutting sector**

# EUROPEAN BIOMETHANE WEEK



## ON YOUR MARKS, GET SET... GROW!

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# THANK YOU!

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

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