



The voice of renewable gas in Europe

Overview of the EU legal framework production, and usage of biomethane planned developments

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280

MEMBERS

234

COMPANIES

46

NATIONAL ASSOCIATION

35

COUNTRIES



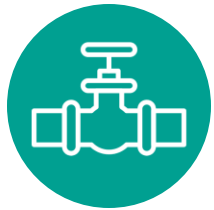
DELIVERING 35 BCM: + 299 BIOMETHANE PLANTS IN 18 MONTHS



1,322 plants

4.5 bcm installed production capacity *at end of 2022*

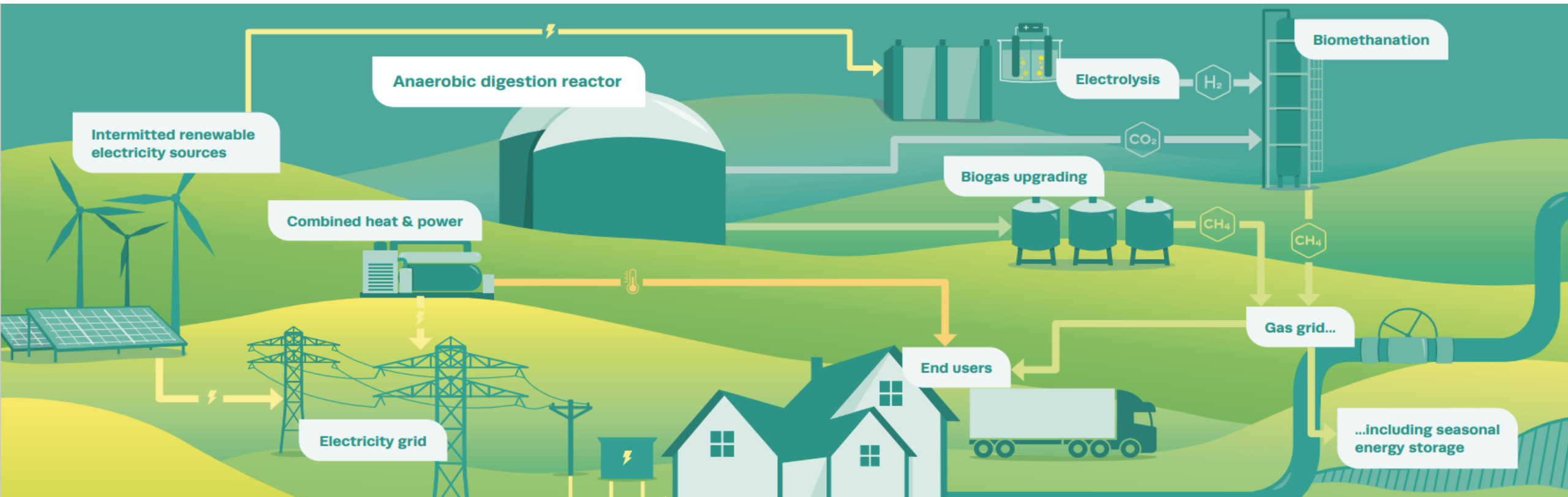
3.5 bcm produced in 2021 (+ 20% YoY from 2020)



77% plants are grid-connected (April 2023) *majority of new plants connected to distribution grid.*

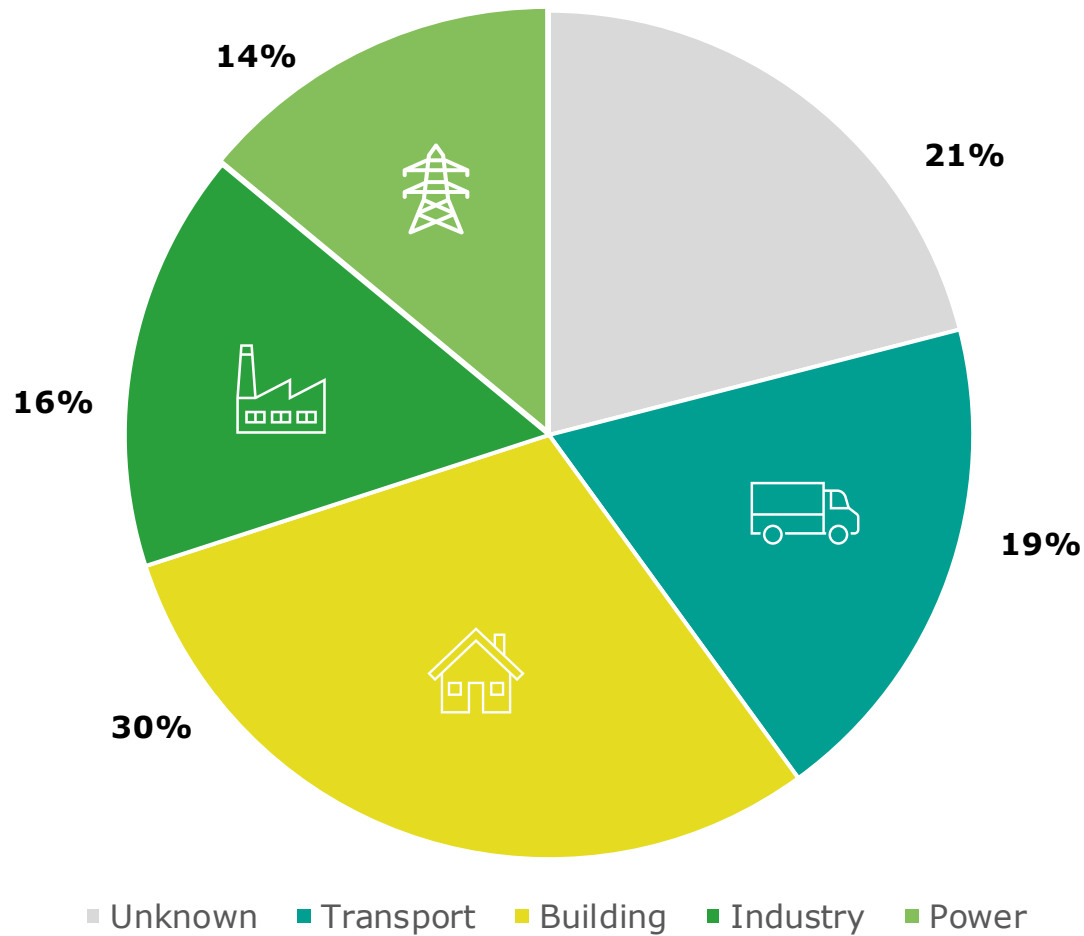


DECARBONISING ALL END USES INCLUDING **TRANSPORT**



END USES: WHERE IS BIOMETHANE USED TODAY?

Biomethane end uses by sector, 2022



■ Unknown ■ Transport ■ Building ■ Industry ■ Power

Source: EBA, SR 2023



MAY 2023: EBA BIOMETHANE INVESTMENT OUTLOOK



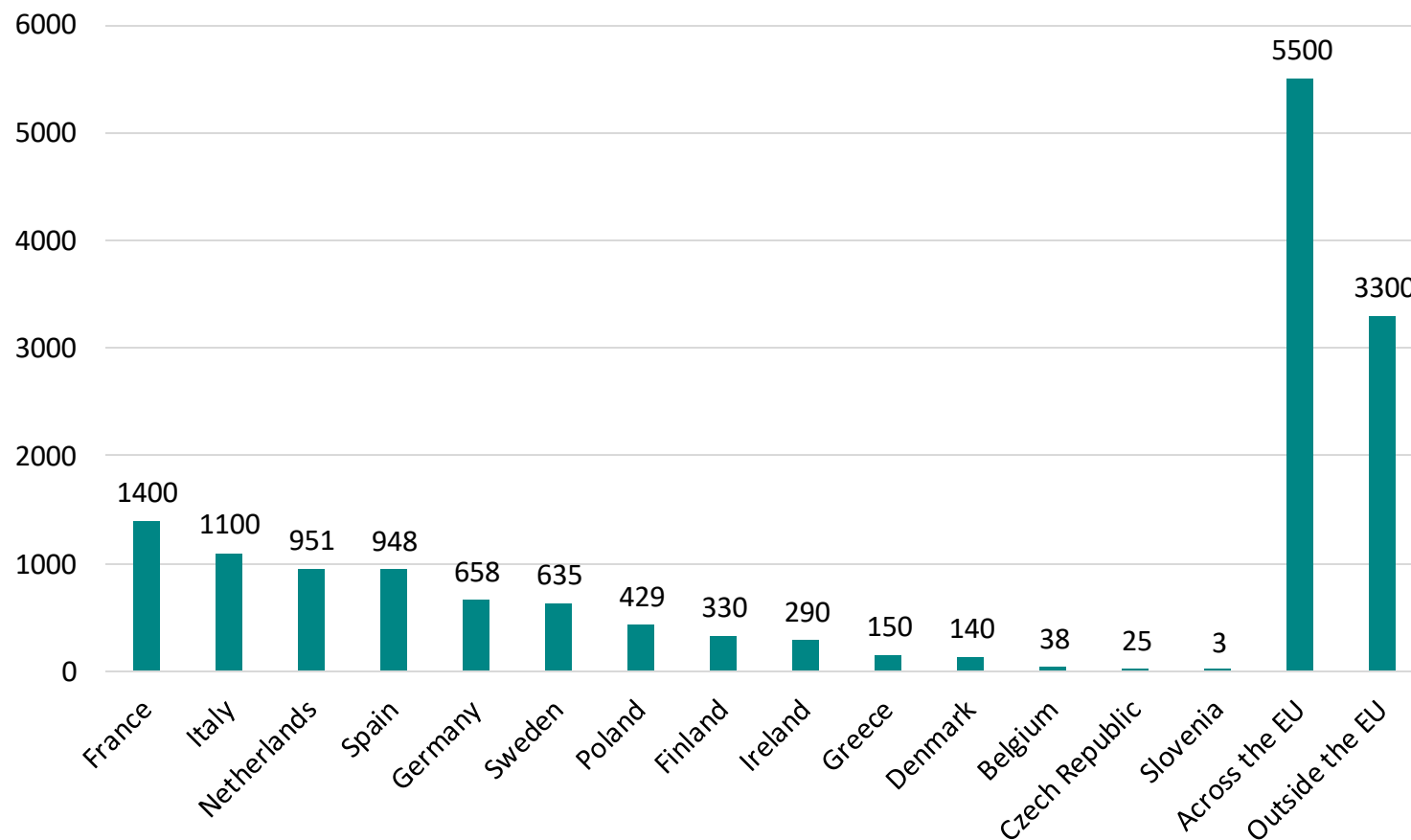
Already **€18 billion** earmarked for investment in biomethane production



Including:

- **€4.1 billion** for 2023-2025
- **€12.4 billion** for 2026-2030
- **€1 billion** with no timeframe specified

Planned investment into biomethane production (€ million)



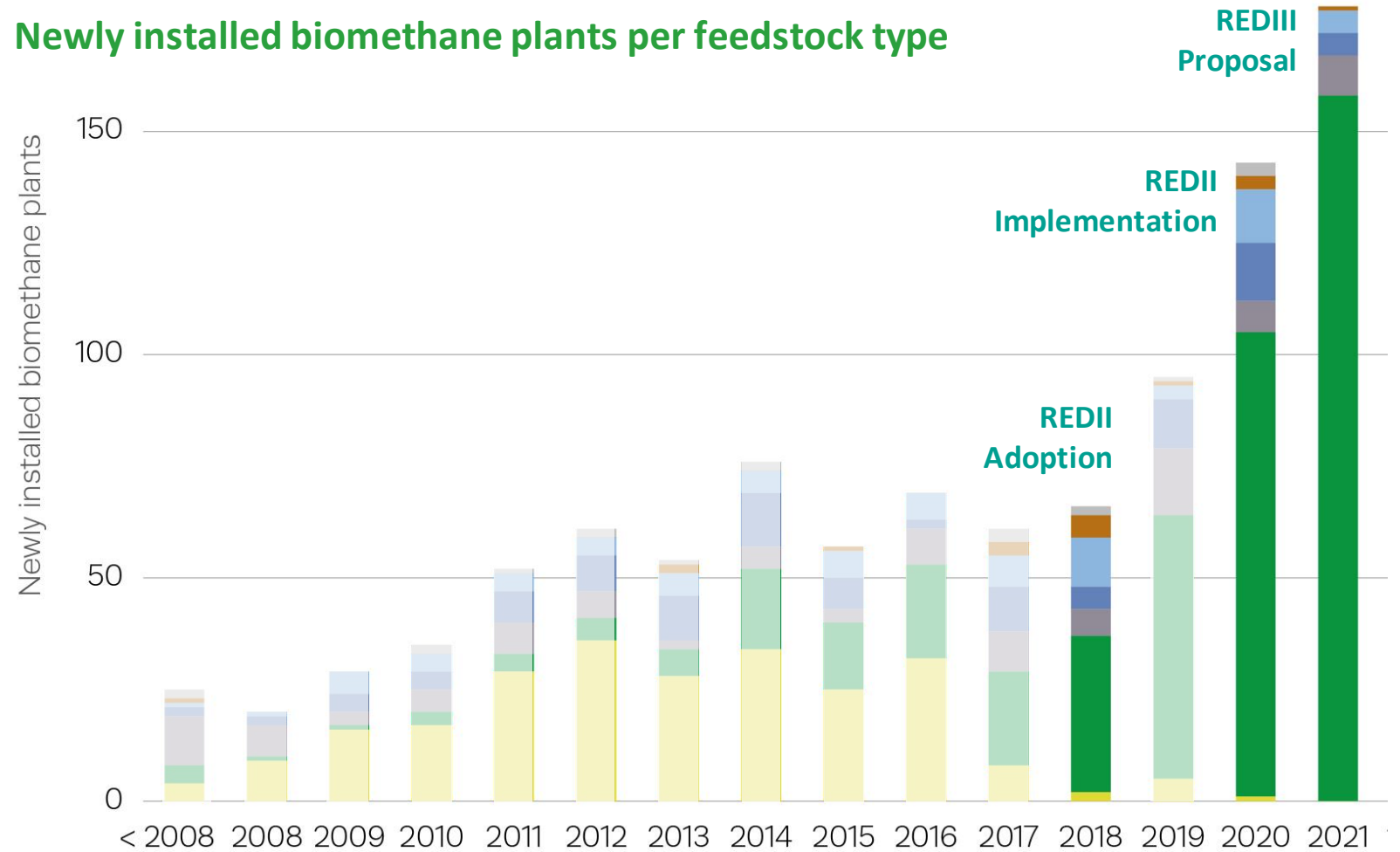
BIOMETHANE IN EUROPE IS PRODUCED FROM SUSTAINABLE FEEDSTOCKS

Evolution of feedstock use

Driver #1: GHG emissions savings

Enabler #1: Tech development

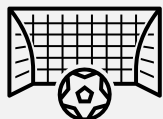
Newly installed biomethane plants per feedstock type



- Monocrops
- Agricultural Residues, Manure, Plant Residues
- Sewage Sludge
- Organic Municipal Solid Waste
- Industrial Organic Waste
- Landfill
- Unknown

Source: EBA Statistical Report 2022

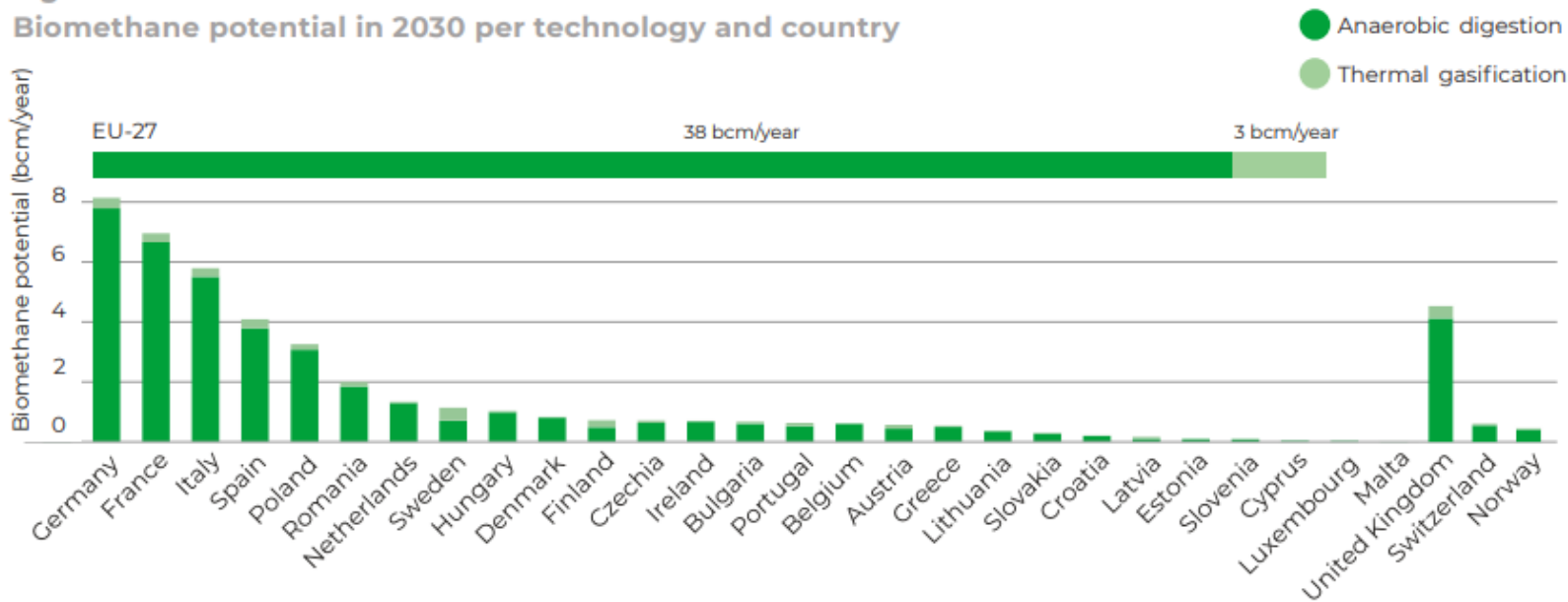
ARE THERE ENOUGH FEEDSTOCKS TO SCALE UP BIOMETHANE PRODUCTION?



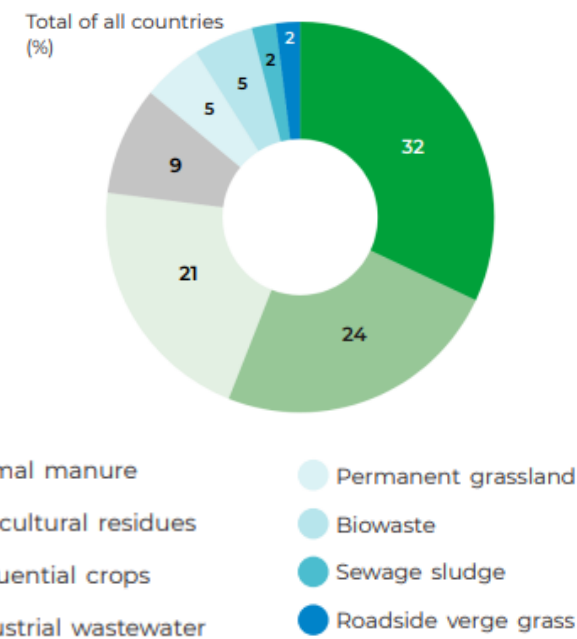
EU27's production potential can meet the 35 bcm REPowerEU target
c. 15% of natural gas demand in 2030.

2030 national sustainable biomethane potentials

Figure 1. Biomethane potential in 2030 per technology and country



Feedstock potential



REDIII: HIGHER EU AMBITION IN BIOMETHANE AND RES DEPLOYMENT

BUILDINGS 49%

Indicative Target,
measures justified
in NECPS

0.8 pp/y 2021-2025

1.1 pp/y 2026-2030

2030 OVERALL EU RES

42.5%

+ 2.5%

INDUSTRY 1.6 pp/y

Indicative Target + Subtarget
RFNBOs / H2 > 42%

TRANSPORT

29% or 

14.5%
GHG intensity

Mandatory Target,
measures justified
in NECPS

REDIII: SWIFTER PERMITTING PROCEDURES



MAPPING

Member States to **map deployment of RES** in their territory + assessment of domestic **potential** and the available surface (NECPs coordination)



RES ACCELERATION AREAS

- **Short and simplified permitting processes.** Priority to a list of areas these include farms, waste management sites, urban wastewater treatment sites, as well as degraded land not usable for agriculture.
- Permit granting outside RES acceleration areas: Not exceeding **2 years**.
- Permit granting inside RES acceleration areas: Not exceeding **1 year**.



CAPACITY BUILDING

Member States to provide adequate resources to ensure **qualified staff, upskilling**, and reskilling of their competent authorities and shall **assist regional and local authorities**.



OVERRIDING PUBLIC INTEREST

Renewables projects to be recognized as an overriding public interest

GAS DECARBONISATION PACKAGE: SPACE FOR A BINDING BIOMETHANE TARGET?



The European Parliament tabled an EU-binding volumetric target in the revision of the Gas Regulation

Article 3 c (new) (3c) Mainstreaming biomethane in the gas system

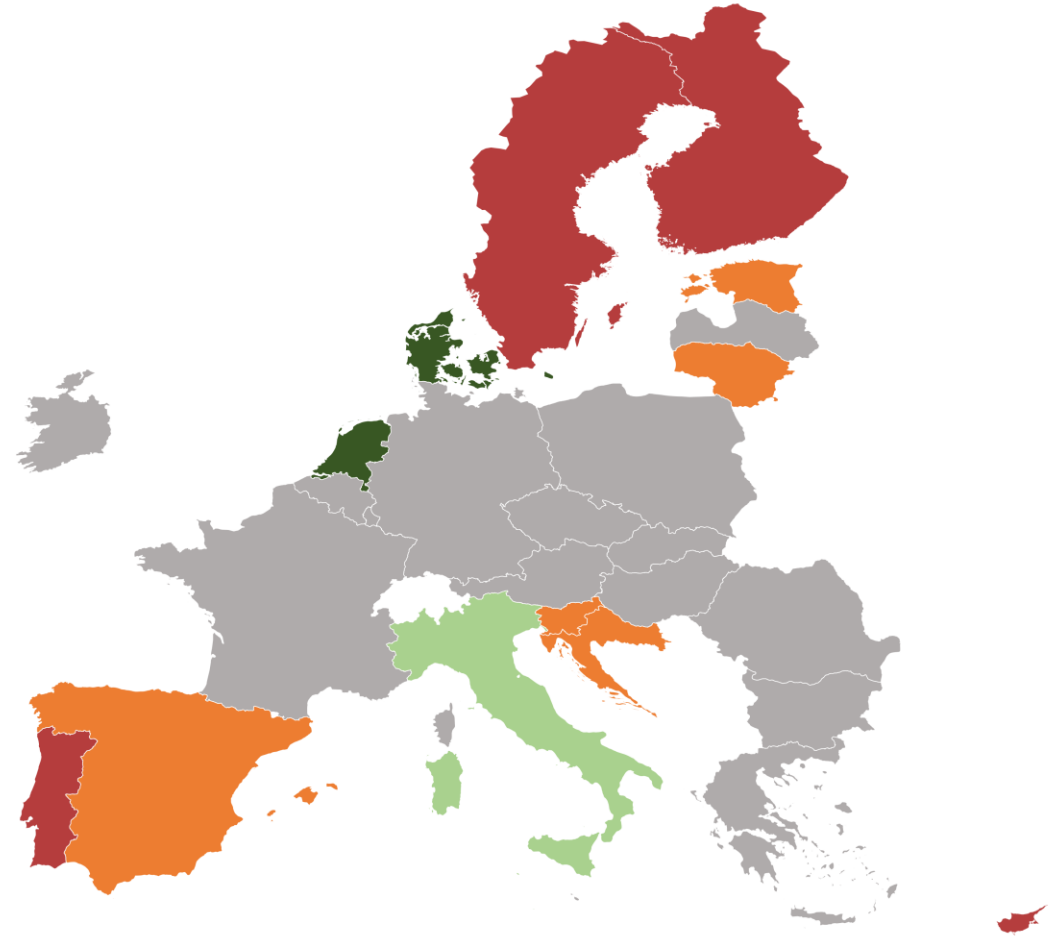
In order to support sustainable production of biomethane to safeguard the security of gas supply in the Union and decrease dependence on fossil natural gas imports, Member States shall, by 31 December 2030, ensure collectively that at least 35 bcm of biomethane is produced and injected into natural gas system in line with the REPowerEU Plan objectives.

- ❖ Volumetric
- ❖ EU-binding
- ❖ Injected biomethane into natural gas system
- ❖ Based on energy security's concern and REPowerEU Plan

Negotiations in trilogue on-going
Final deal expected end of November

Gap analysis NECP 2024 biomethane targets

- NECP not published
- Biomethane target > 20% lower 2030 potential
- No biomethane target in NECP
- Biomethane target above 2030 potential
- Biomethane target < 20% below 2030 potential



WHY A BINDING TARGET?

Considering current planning:

1. Draft updated NECP2024 target
2. Pre-NECP2024 target
3. Current production

19,68 bcm



REVERSE THE PARADOX



EBA
European Biogas
Association

REVERSE THE PRODUCTION vs END-USE PARADOX

DRIVERS



RePowerEU

35 bcm/y by 2030



2030 OVERALL EU RES

42.5% (+2.5) (35%)



TRANSPORT

29% or 14.5% GHG intensity



ADVANCED BIOFUELS & RFNBOs

5.5%



NZIA

Strategic technology

GAMESTOPPERS

CO₂ standards for cars and vans

CO₂ standards for HDV

Annex IX review

EcoDesign

SOLUTIONS

Biomethane = CO₂ neutral fuel

Carbon correction factor

Sustainable feedstock as intercrops, waste and residues as advanced (part A Annex IX)



THANK YOU!

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