

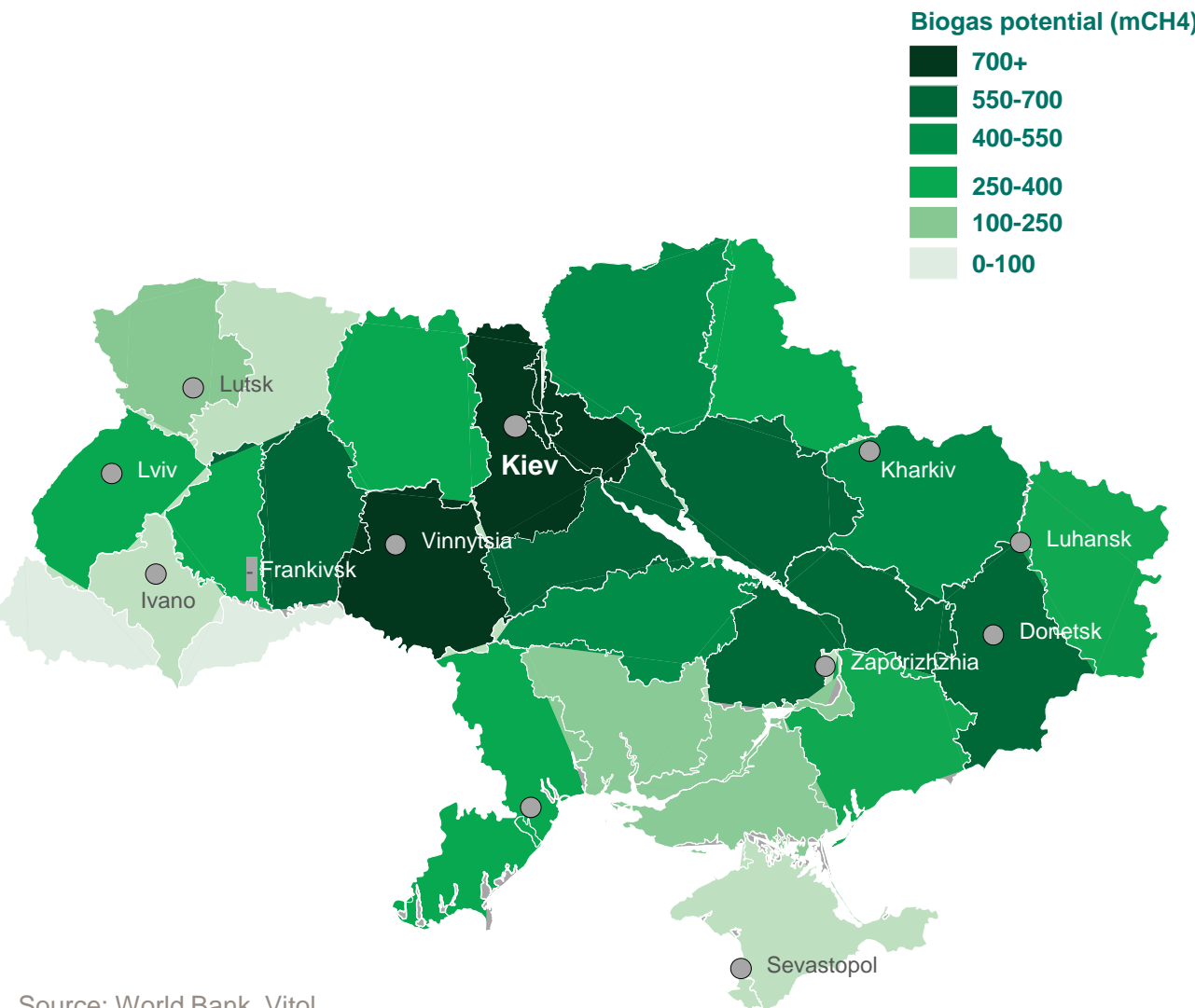


UKRAINE – Biomethane potential

Lifting foreign direct investment by opening export opportunities

Ukraine biomethane: the exciting energy resource for the country

The war is the only deterrent currently limiting the investment potential in the country



- A** The Biogas Fairway
- B** Transport infrastructure
- C** Savvy commercial players
- D** Maturing regulatory framework

- Very large potential**
- 9.7 billion m³CH₄/year potential
 - Target of 1.0 billion m³/year in 2030 and 4.5 billion m³/year in 2050 is conservative
- Ready infrastructure**
- Highly developed natural gas supply network
- High performing agri sector**
- Number of large sophisticated commercial organisations
 - Able to engage with complex commercial negotiation
- A regulator eager to help**
- 3Q/2021, Law No. 1820-IX & Government Resolution No. 823 : setup of GOO and a biogas registry
 - 05/23: new rules for injecting biomethane into gas grid
 - 06/23: NKRE mass balancing between national and regional grids allowed

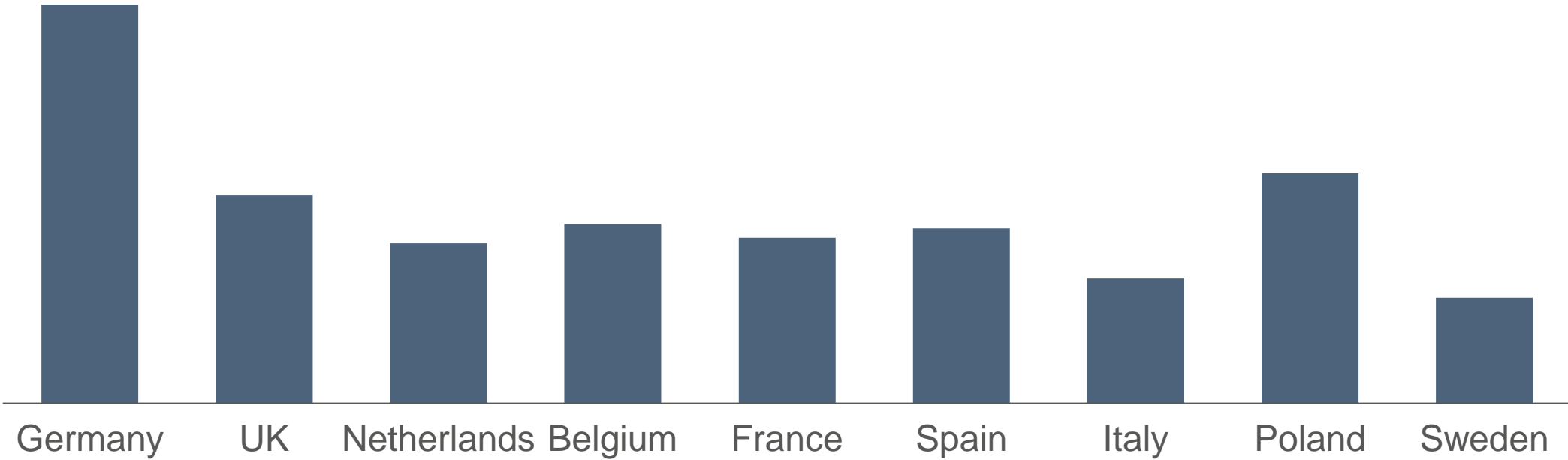
Source: World Bank, Vitol



What is the best market for Ukrainian biogas

Price of biogas under RED II/III

15% manure / 85% crop by gas output; €/ton



What barriers do Ukrianian producers have to overcome?

Several pieces missing, none of which pose material conceptual challenges or is complex from the regulatory and legal point of view.

