

The road towards achieving the 35 bcm biomethane target by 2030 in Europe

BIOCON

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EBA in a nutshell



EBA – representing the full value chain



≥ 330
MEMBERS

285
COMPANIES

51
NATIONAL ASSOCIATIONS

37
COUNTRIES

A new plan for Europe's sustainable prosperity and competitiveness

EU strategic agenda for 2024-2029

Following the European elections in June 2024, the EU has defined **key priorities** to guide its work until 2029.

1

A free and democratic Europe

Upholding democratic values within the EU and globally

2

A strong and secure Europe

Enhancing external action, security and defence, while preparing for a stronger Union

3

A prosperous and competitive Europe

Strengthening competitiveness, driving green and digital transitions, and fostering innovation and a business-friendly environment



College of Commissioners 2024-2029

The biogases market in Europe



Biogases today

22 bcm

of biogases produced in Europe, more than the entire inland natural gas consumption of Belgium, Denmark and Ireland combined



4.9 bcm

biomethane produced in Europe in 2023, with 6.1 bcm/year of installed capacity



Potential to replace

15%

of nitrogen-based fertilisers in the EU with 2022 digestate production

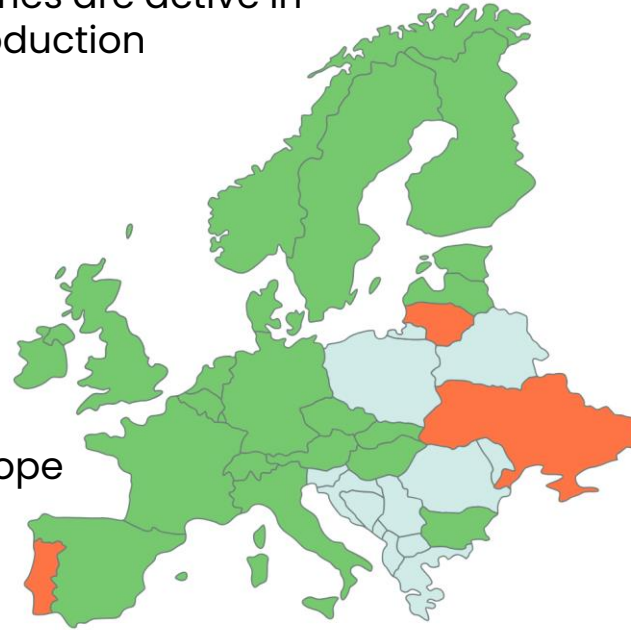
25

European countries are active in biomethane production



18%

increase in biomethane produced in Europe



■ New producing countries in 2022 and 2023



29 Mton

of bio-CO₂ produced from biogas and biomethane production



250,000

green jobs in Europe

Balanced distribution across end-uses:

23%

In transport

17%

In buildings



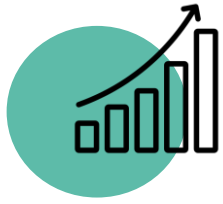
15%

In power generation

13%

In industry

22 bcm of biogases are produced today in Europe

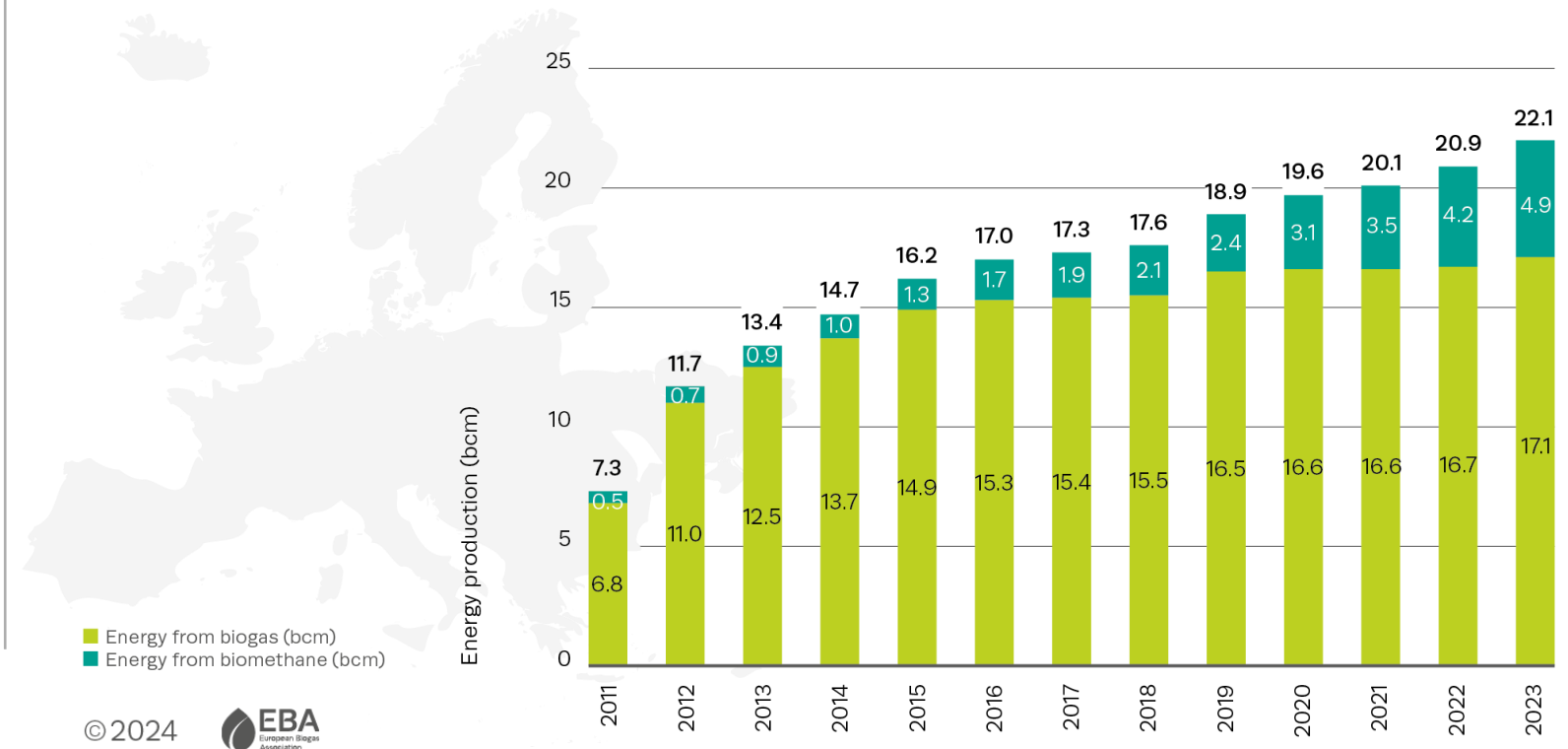


Combined biomethane and biogas production in Europe

= Gas consumption of Belgium, Denmark and Ireland combined
= 7% EU gas consumption in 2023

19 bcm of combined production in EU-27

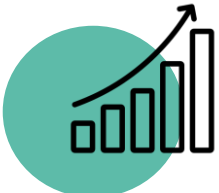
Combined biomethane and biogas production in Europe (bcm)



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Biggest growth on biomethane production to date



In 2023: 4.9 bcm biomethane production (4.1 bcm in EU-27)

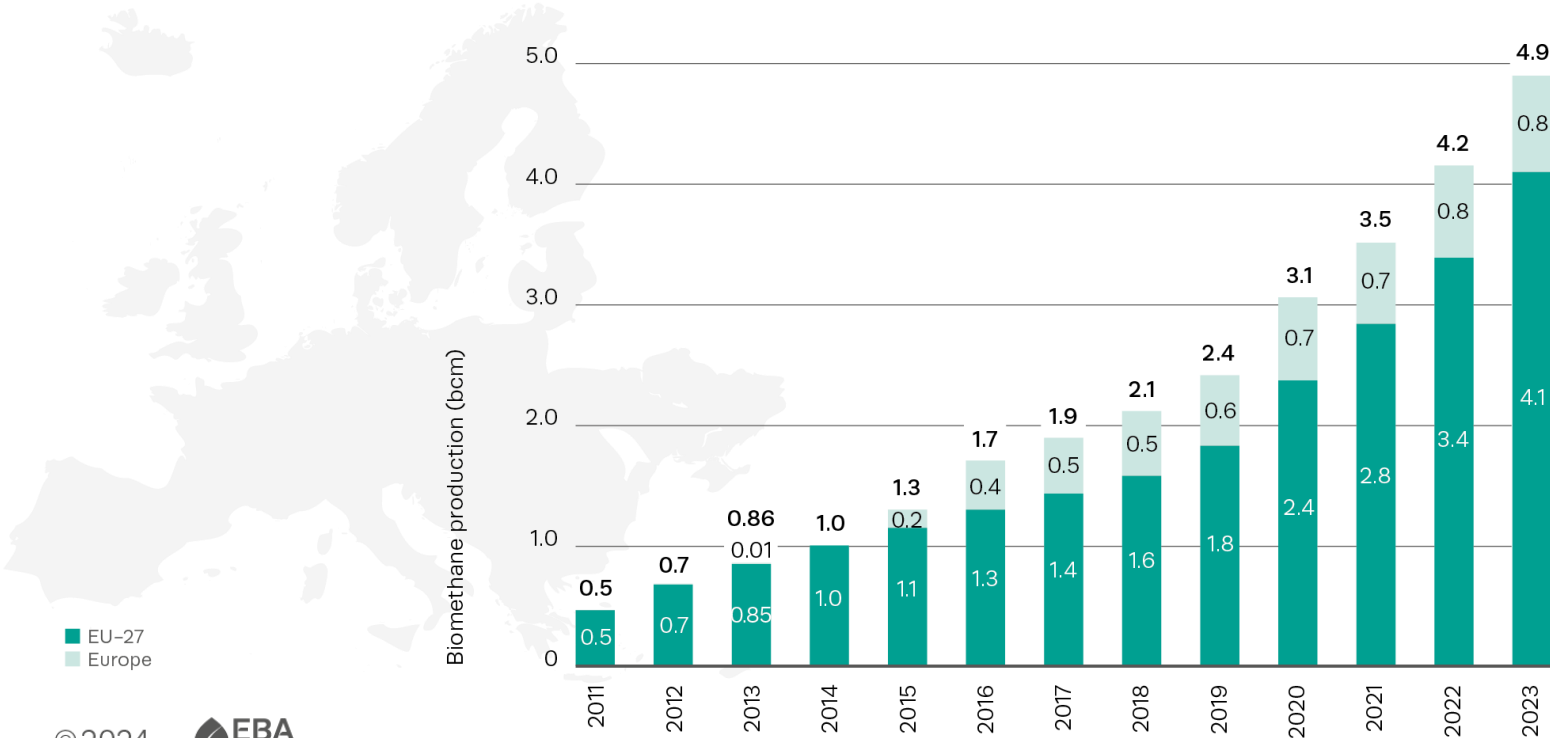
- 18% YoY growth in Europe
- 21% YoY growth in EU-27

In Q1 2024: **6.4 bcm biomethane installed capacity**

Italy, France, Denmark, and the UK are leading the production and scale-up of biomethane



Biomethane production in the EU-27 and Europe (bcm)



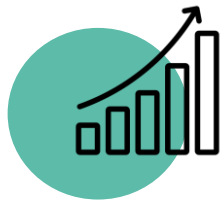
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Biomethane production potential in Hungary



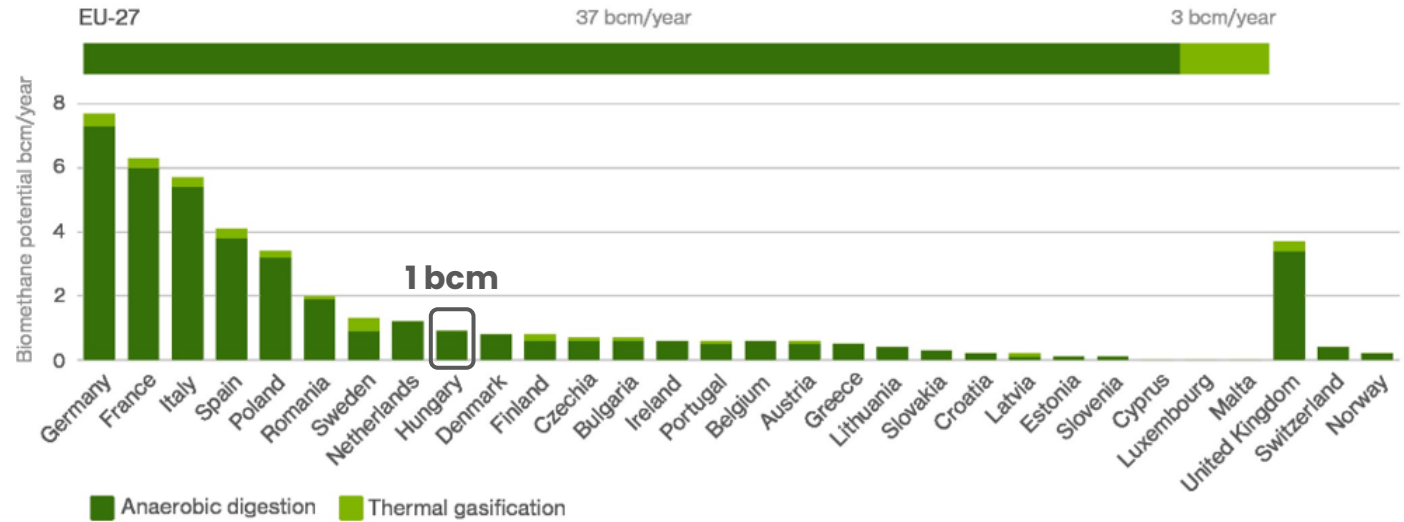
Biomethane production potentials in 2030 and 2050



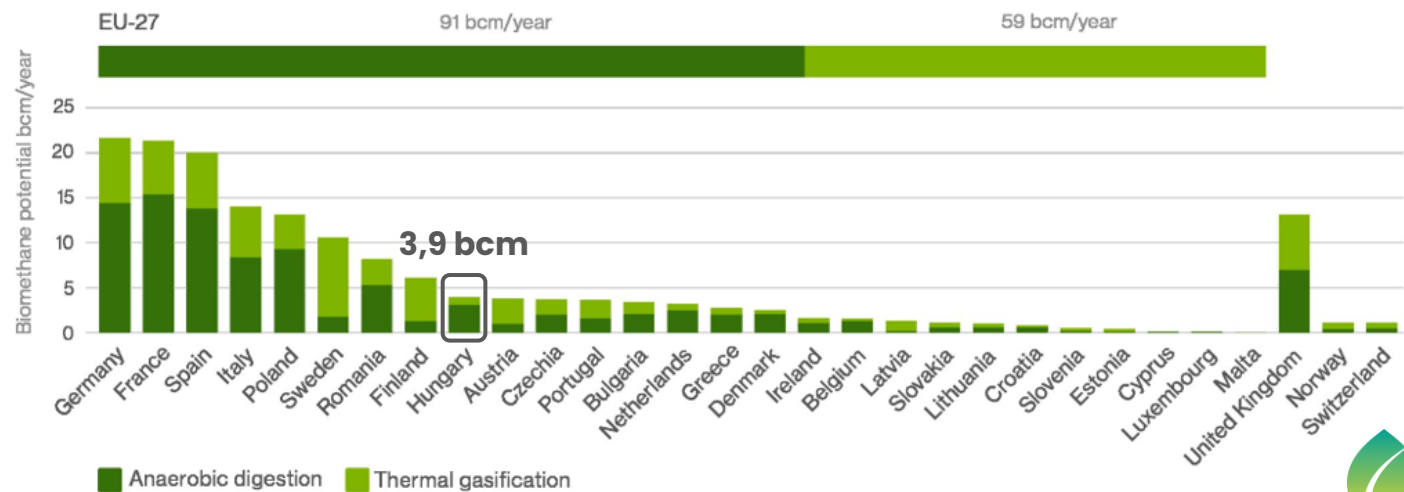
Production potentials in Hungary

- **1 bcm** of biomethane production potential by **2030**
- **3.9 bcm** of biomethane production potential by **2050**
 - 0.8 bcm from gasification
 - 3.1 bcm from AD

Biomethane potential (bcm/year) in 2030 per country and technology



Biomethane potential (bcm/year) in 2050 per country and technology



*Source: ©2024 Guidehouse Europe Ltd

Incentives to boost sustainable biomethane production

Biomethane market incentives



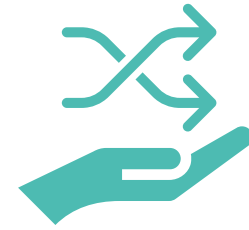
PRODUCTION SUPPORT

- Feed-in tariff
- Feed-in premium
- Tenders
- CAPEX support
- Contracts for difference



DEMAND SIDE INCENTIVES

- GHG intensity targets
- EU-ETS
- Biomethane consumption mandates
- Renewable energy mandates
- Tax incentives



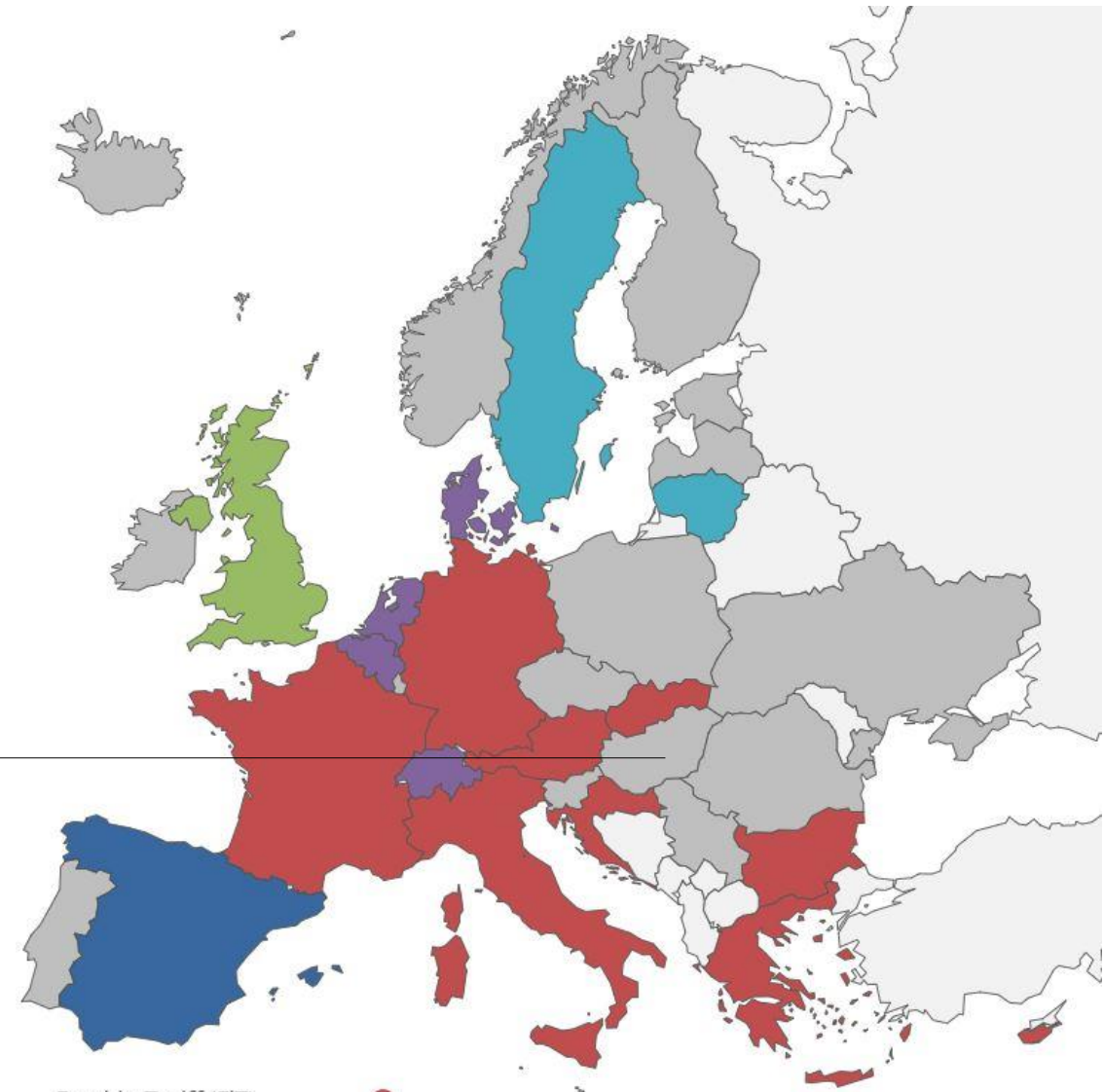
INDIRECT SUPPORT

- Regulatory or financial incentives for biomethane feedstock providers to collect feedstock and to deliver it to biomethane plants
- Positive legal framework to use digestate as a local source of nutrients and industrial application of biogenic CO₂

Main support systems in place

HUNGARY

- No support scheme is yet in place for biomethane.
- The private sector continues to explore investments in biogas production, aiming to secure their own energy supplies at stable and predictable costs.



Thank you!

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