



The voice of renewable gas in Europe

# BIOMETHANE : SOLVING THE PARADOX

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# THE WHOLE BIOGASES VALUE CHAIN

**280**

MEMBERS

**234**

COMPANIES

**46**

NATIONAL ASSOCIATION

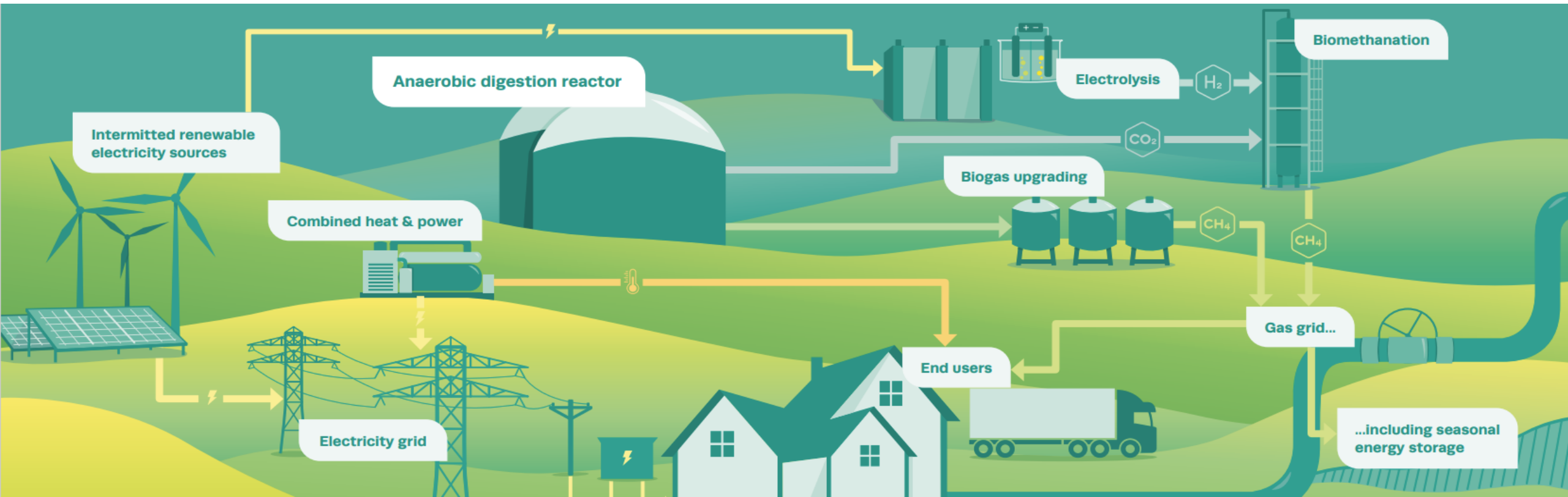
**35**

COUNTRIES

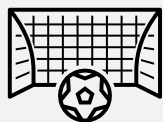




# DECARBONISING ALL END USES INCLUDING **TRANSPORT**



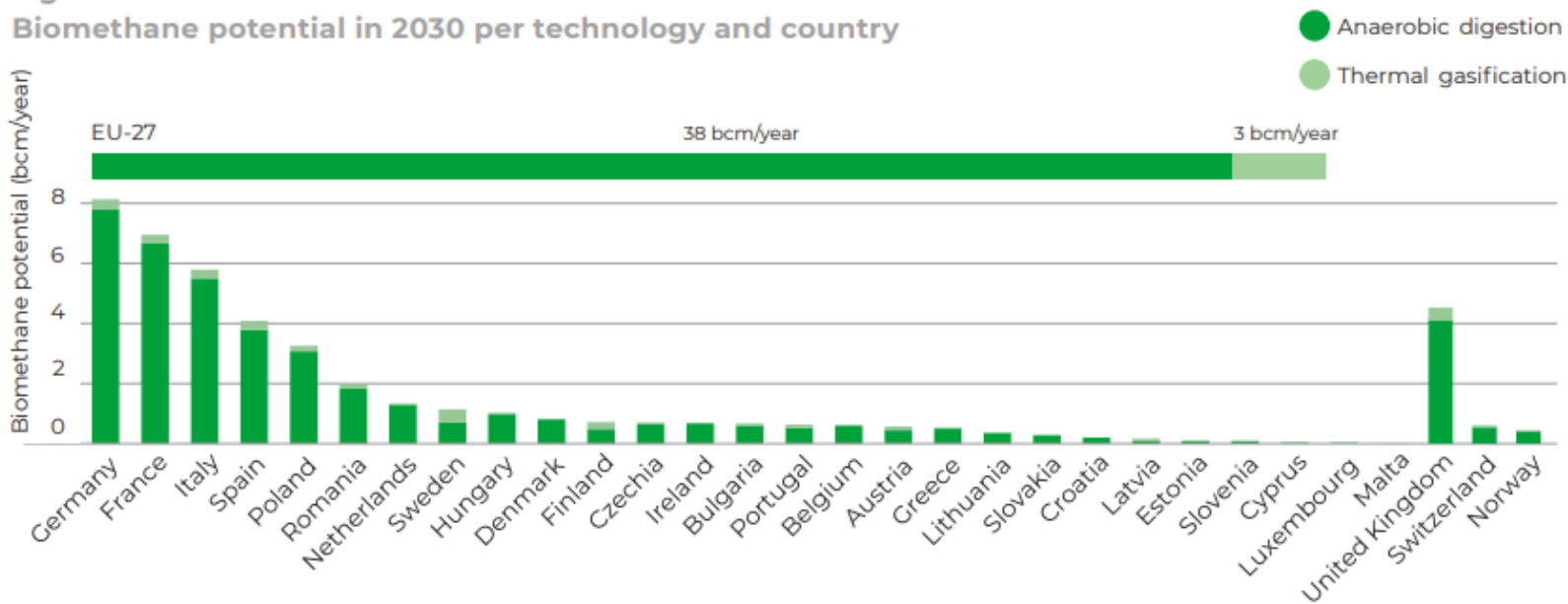
# ARE THERE ENOUGH FEEDSTOCKS TO SCALE UP BIOMETHANE PRODUCTION?



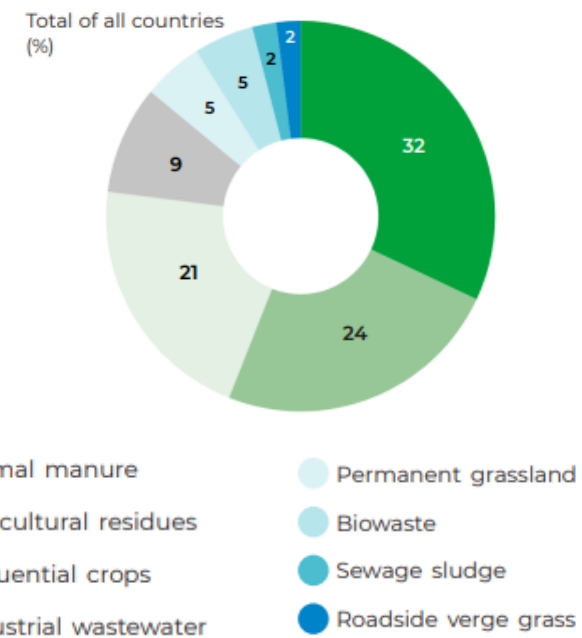
EU27's production potential can meet the 35 bcm REPowerEU target  
c. 15% of natural gas demand in 2030.

## 2030 national sustainable biomethane potentials

Figure 1.  
Biomethane potential in 2030 per technology and country



## Feedstock potential



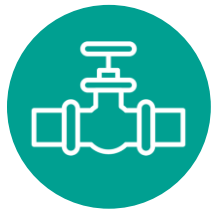
# DELIVERING 35 BCM: + 299 BIOMETHANE PLANTS IN 18 MONTHS



**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.*





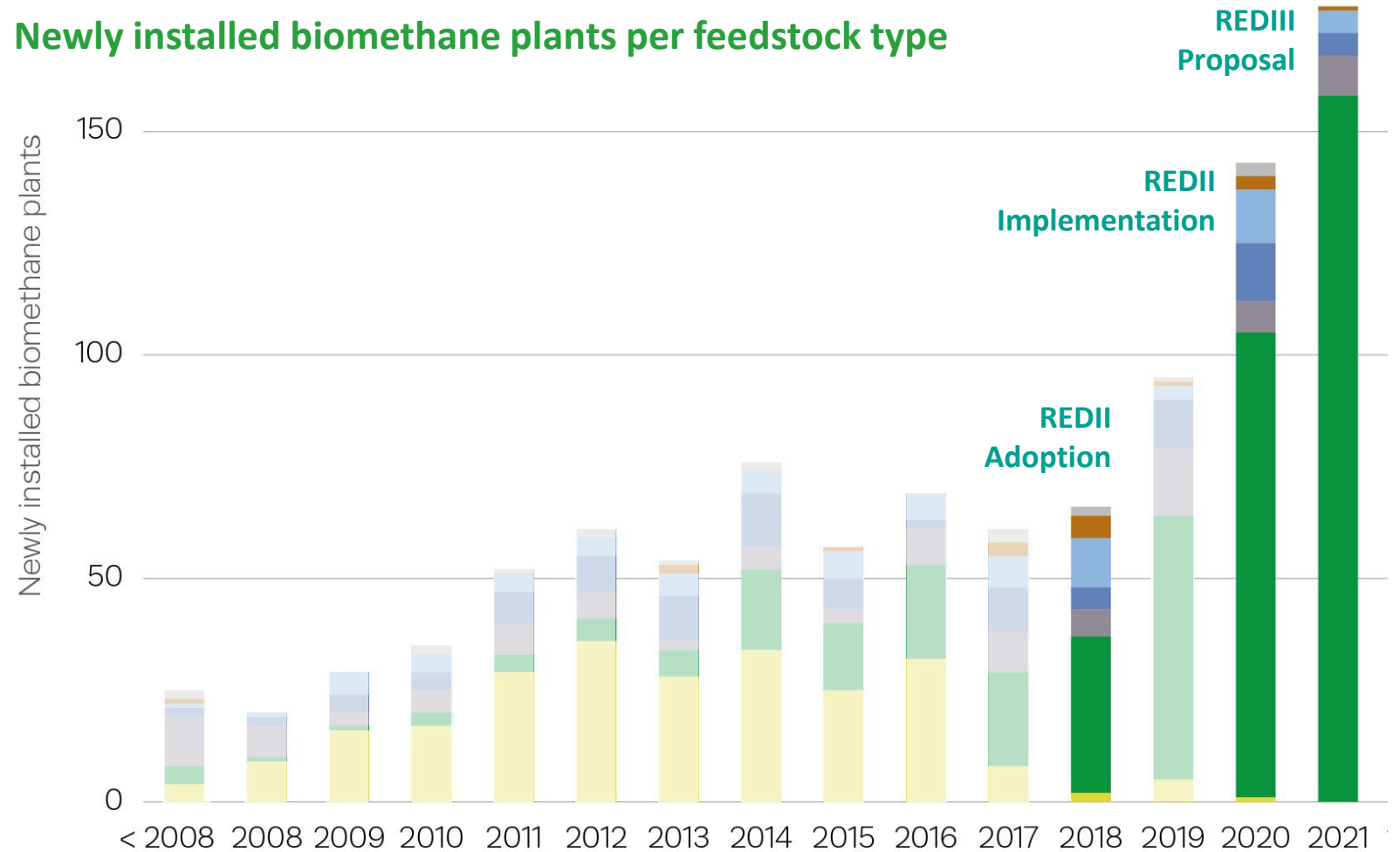
# BIOMETHANE IN EUROPE IS PRODUCED FROM SUSTAINABLE FEEDSTOCKS

**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



# REVERSE THE PARADOX



# 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

**CO<sub>2</sub> standards for cars and vans**

CO<sub>2</sub> standards for HDV

Annex IX review

EcoDesign

## SOLUTIONS

*Biomethane = CO<sub>2</sub> neutral fuel*

*Carbon correction factor*

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





**EBA**

European Biogas  
Association

**THANK YOU!**

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# ANNEX IX

EU legislation is not providing the sector with the **appropriate framework**.  
On the contrary, it is giving **contradictory drivers** for **Advanced Biofuels production**.

ANNEX

Annex IX to Directive (EU) 2018/2001 is amended as follows:

(1) in Part A, the following feedstocks are added:

“

- (r) Alcoholic distillery residues and wastes (fusel oils) not fit for use in the food or feed chain;
- (s) Raw methanol from kraft pulping stemming from the production of wood pulp;
- (t) Non-food crops grown on severely degraded land, not suitable for food and feed crops;

(2) in Part B, the following feedstocks are added:

“

- (c) Bakery feed chain;
- (d) Drink production;
- (e) Fruit and vegetable processing residues, excluding those in the food or feed chain, excluding those in the food or feed chain, excluding those in the food or feed chain;
- (f) Starchy and feed;
- (g) Brewers;
- (h) Liquid whey permeate;
- (i) Deoiled olive pomace;
- (j) Damaged crops that are not fit for use in the food or feed chain, excluding substances that have been intentionally modified or contaminated in order to meet this definition;
- (k) Municipal wastewater and derivatives other than sewage sludge;
- (l) Brown grease;
- (m) Cyanobacteria;
- (n) Vinasse excluding thin stillage and sugarbeet vinasse;
- (o) Dextrose ultrafiltration retentate from sugar refining;
- (p) Intermediate crops, such as catch crops and cover crops that are grown in areas where due to a short vegetation period the production of food and feed crops is limited to one harvest and provided their use does not trigger demand for additional land and provided the soil organic matter content is maintained.”

## Annex IX

- **Draft DA lists in Part B feedstocks currently accounted as advanced** in a number of MS, inevitably resulting in

(p) Intermediate crops, such as catch crops and cover crops that are grown in areas where due to a short vegetation period the production of food and feed crops is limited to one harvest and provided their use does not trigger demand for additional land and provided the soil organic matter content is maintained.”

**Feedstocks in Part B**  
considering analogous

**between Part A and B**

based on advanced or mature processing technologies. Substrates fit for biogas and biomethane production should always be listed in Part A.

- **Feedstocks relegated in Part B would be subject to the 1.7% limitation** in the contribution to the target of renewable energy share for transport in Art 27.1(c)iv.