

# European New Institutional Cycle

**General Assembly and workshop  
29 November 2024, Barcelona**

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**1.  
BIOGAS  
TODAY**

**2.  
TOWARDS  
2040**

**3.  
NEW EU  
CYCLE**



The background of the slide features a close-up of a butterfly with orange and black patterned wings perched on a purple flower. A semi-transparent green overlay covers the right side of the image. In the top-left corner, there is a white-bordered inset showing a bio-refinery facility with large storage tanks and industrial structures.

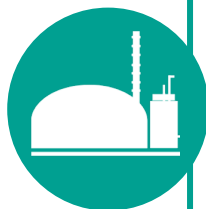
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# Biomethane is growing: X2 in 4 years

## European biomethane production in EU-27 and Europe

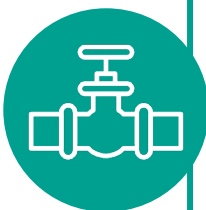


**4.2 bcm** (3.4 in EU-27)

4.5 bcm installed capacity



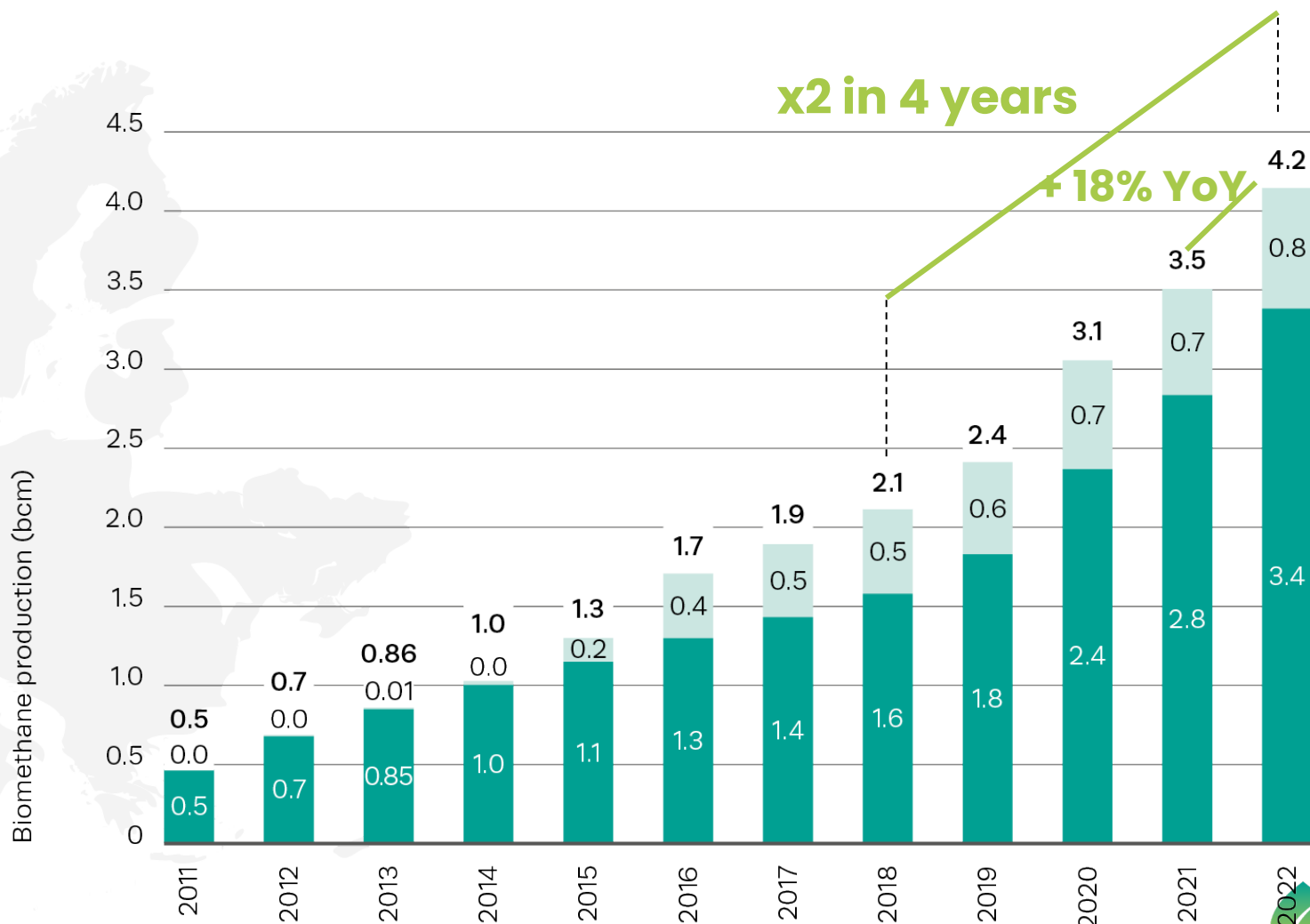
x2 production since 2018



>75% plants grid connected, most to distribution grid

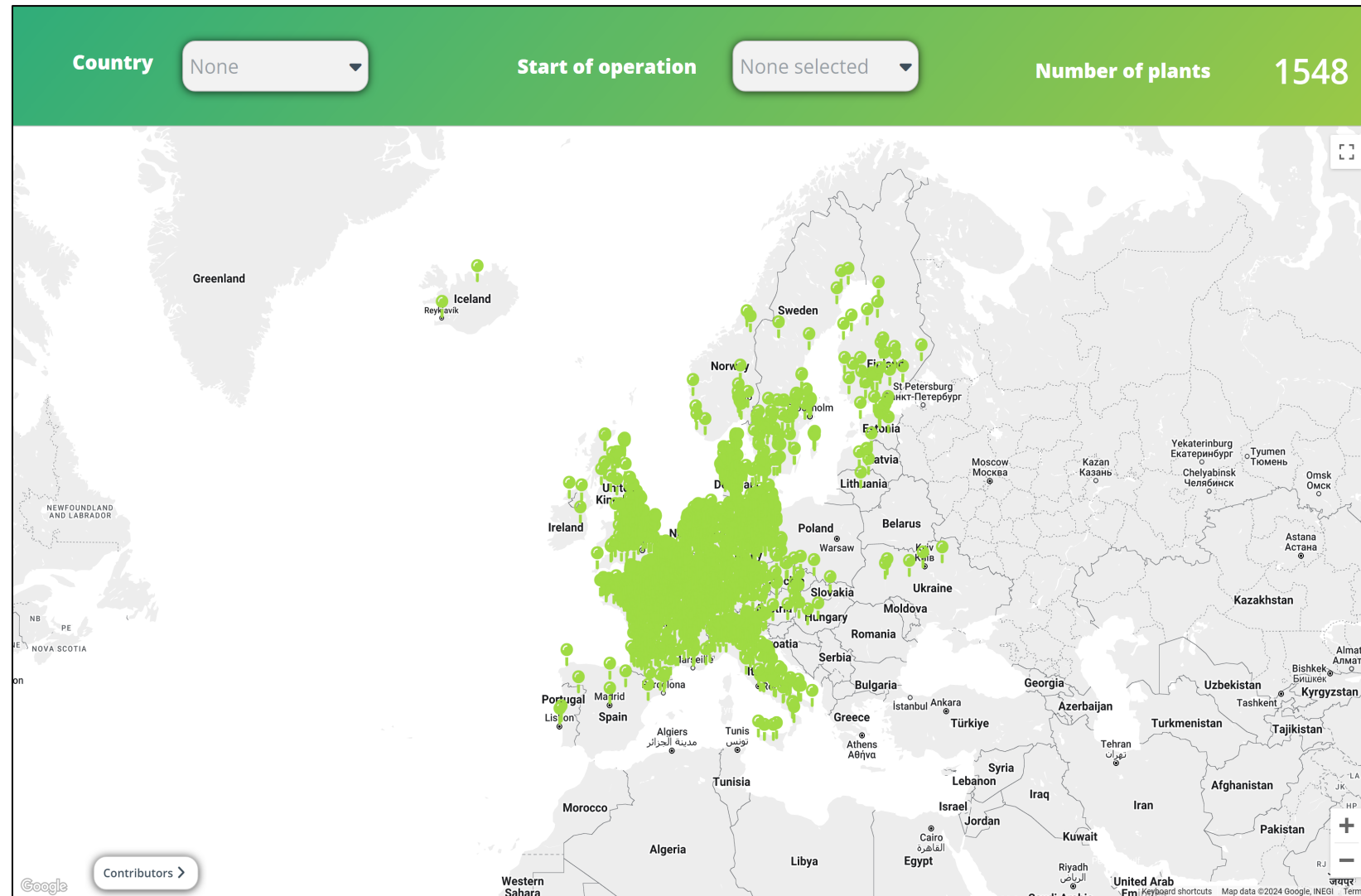


24 producing countries in 2022





# European Biomethane Map 2024: 1,548 plants in operation



<https://europeanbiogas.clicdata.com/v/Yux1B2opYFds>

# 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 Nm³/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%

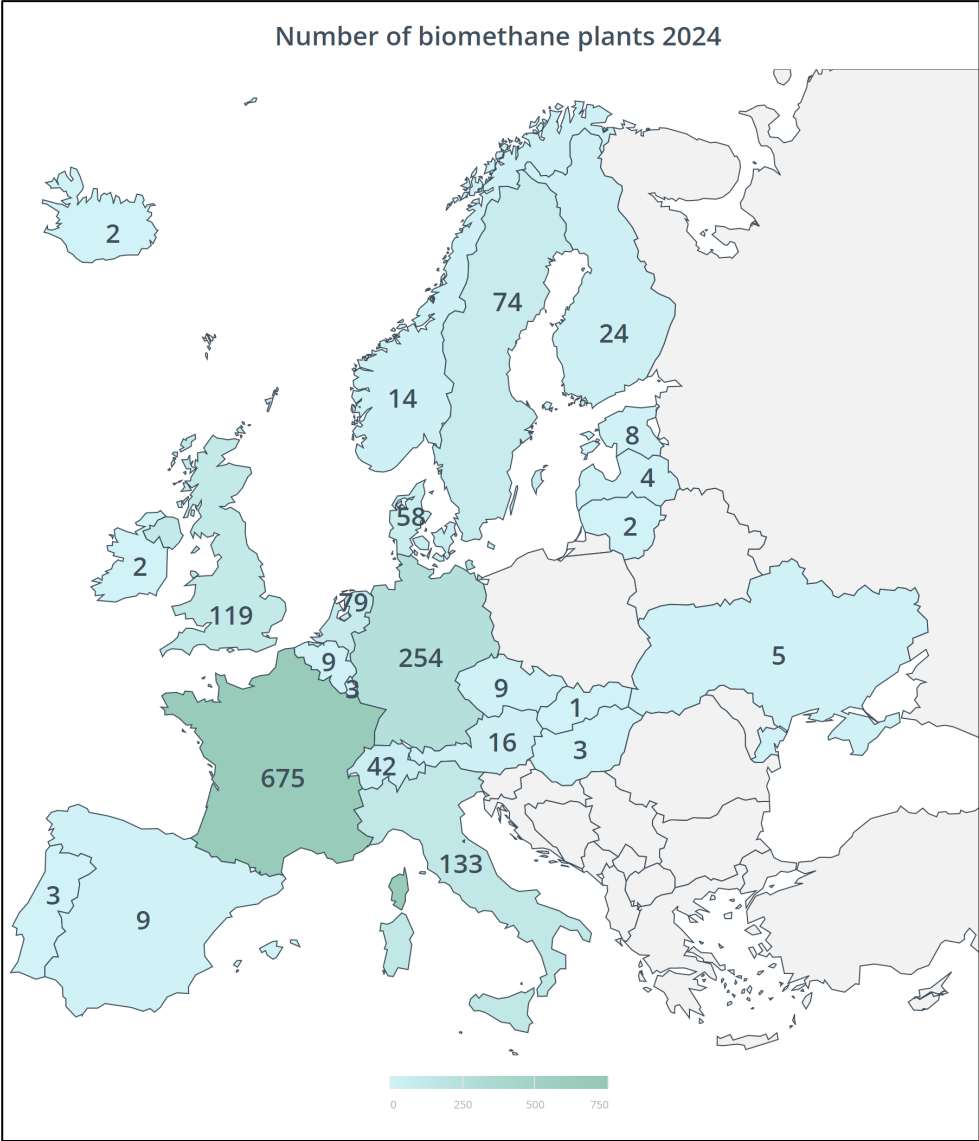
**Growth for EU-27:**

37%

**Growth for non-EU:**

20%

# Statistics: geographical distribution



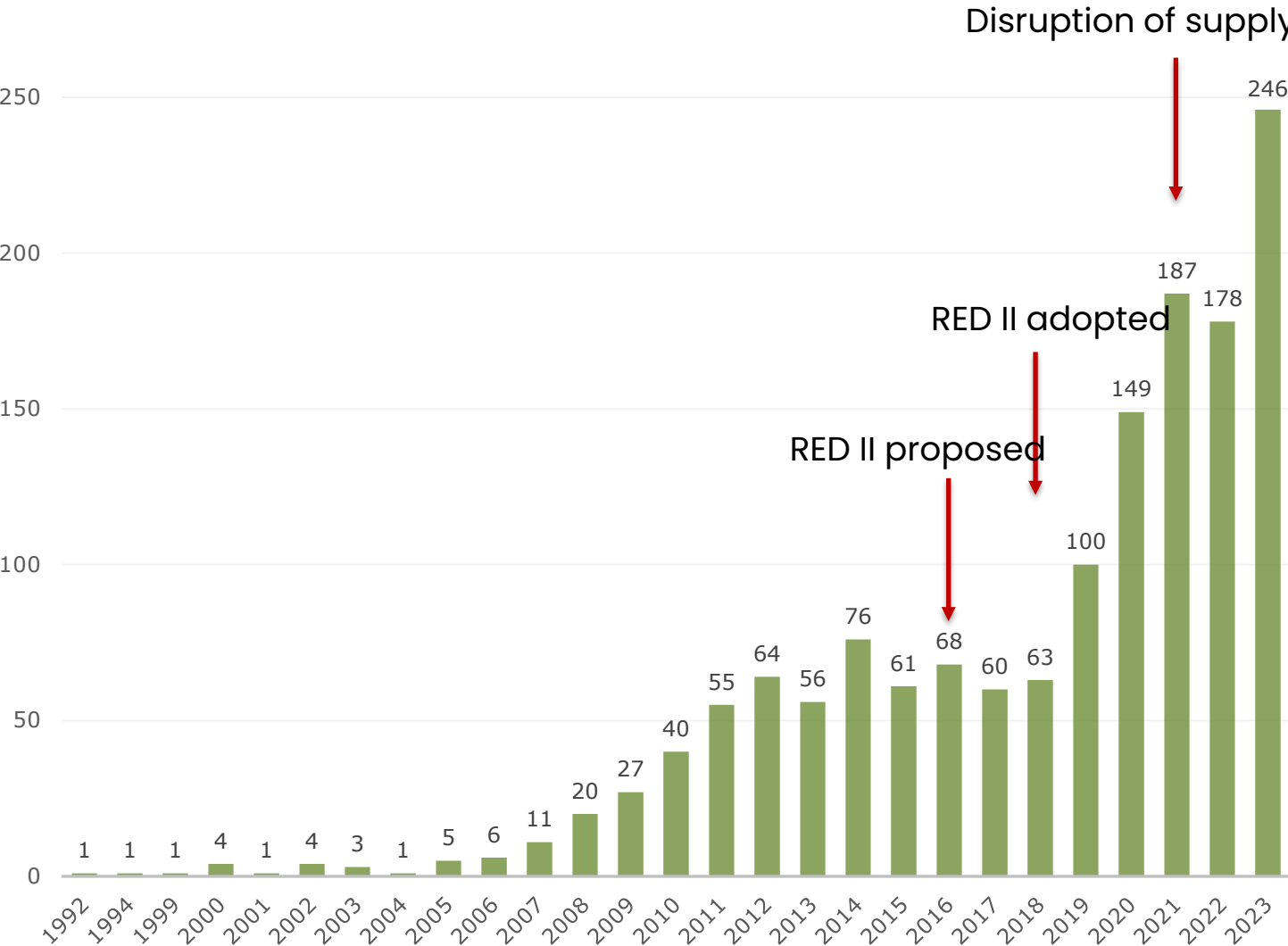
## Countries with biggest growth in installed capacity:

Italy	238%
France	51%
The Netherlands	23%

## Average biomethane plant in Europe:

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

# Statistics: historical distribution



## Key takeaways:

- Noticeable increase after 2018 RED II adoption
- Increase despite disruption of supply chains in 2020–2022

**Identified new plants in 2024: 56**

Number of biomethane plants (that are still operational) per their start of operation year



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# €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



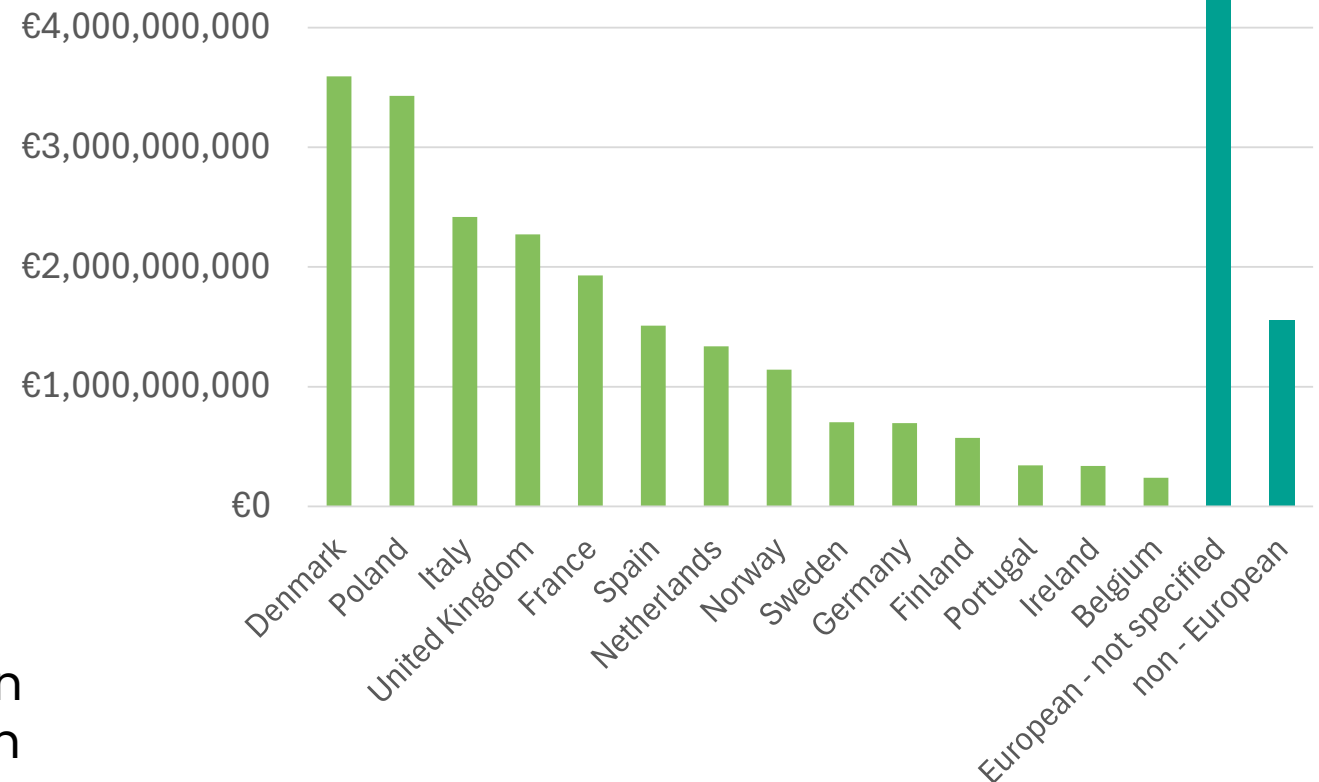
# Denmark, Poland and Italy are top countries for planned investments

## 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

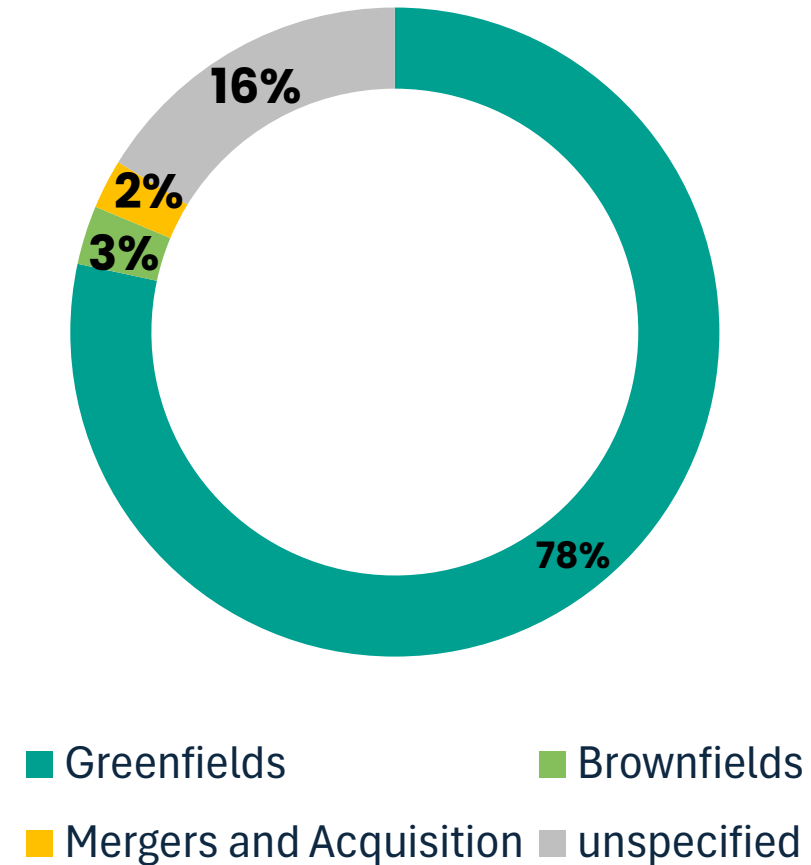
European (yet to be specified)	€ 4.5 billion
Non-European	€ 1.5 billion



*Geographical distribution of investment volumes*

# 78% of investments are for greenfields plants

- **€20.9 billion** planned for greenfield biomethane plants
- **€0.8 billion** reserved for brownfields
- **€0.7 billion** goes to mergers and acquisition





# Biomethane in the updated NECPs

## NECPs with 2030 biomethane target

Belgium	<b>0.11 bcm</b>
Czechia	<b>0.5 bcm</b>
Denmark	<b>0.4 bcm</b> (/100% green gas in grid)
Estonia	<b>0.04 bcm</b> (380 GWh)
France	<b>4.15 bcm</b> (44 TWh)
Greece	<b>0.2 bcm</b> (2.1 TWh)
Ireland	<b>0.58 bcm</b>
Italy	<b>5.7 bcm</b>
Lithuania	<b>0.13 bcm</b> (1.4 TWh)
Netherlands	<b>2 bcm</b>
Slovakia	<b>0.3 bcm</b>
Slovenia	<b>0.05 bcm</b> (480 GWh)

**TOTAL 14.16 bcm**

## Other 2030 biomethane target

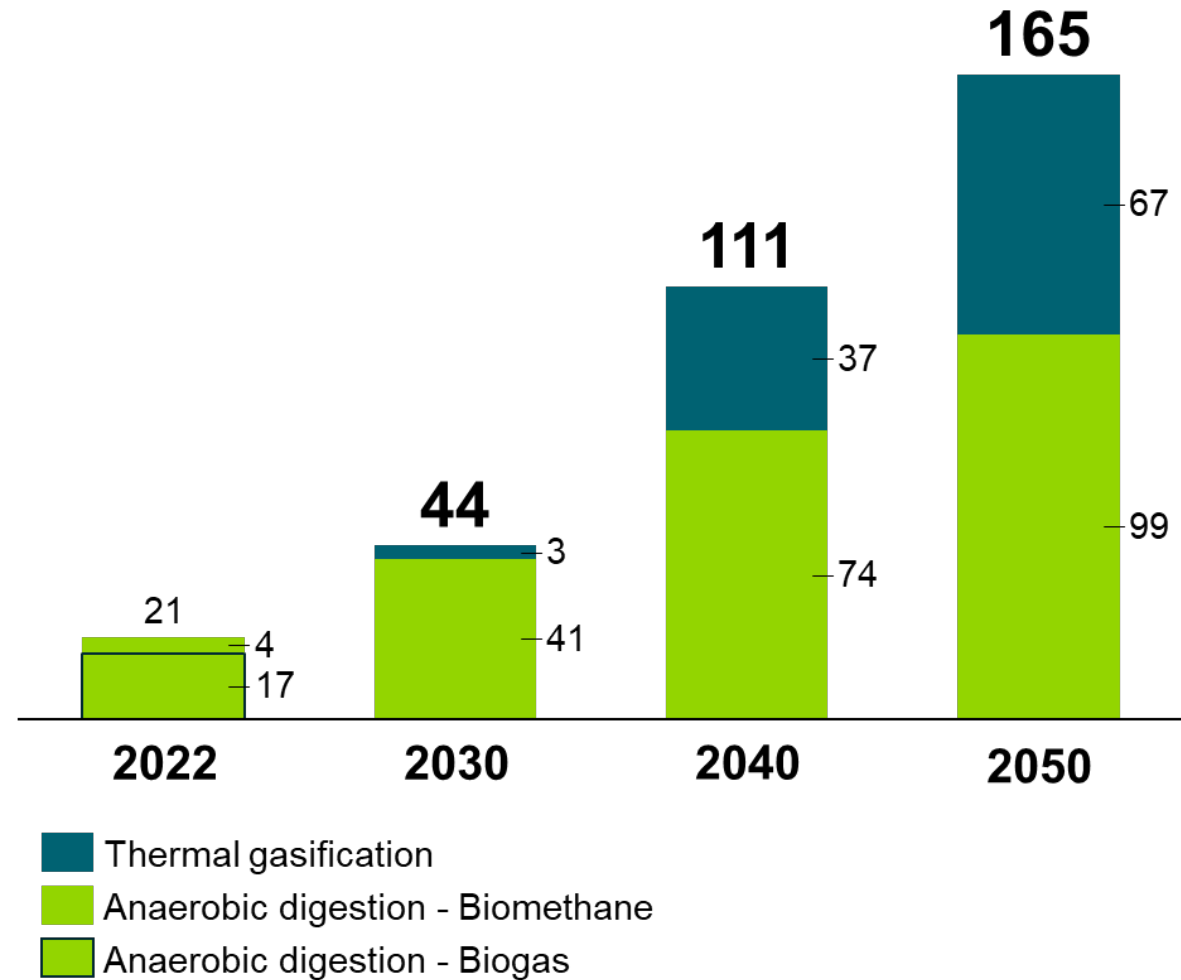
Austria	<b>0.39 bcm</b> (50% renewable gas target)
Finland	<b>0.38 bcm</b> (4 TWh)
Ireland	<b>0.58 bcm</b> (5.7 TWh)
Latvia	<b>0.09 bcm</b> (10% fossil natural gas)
Poland	<b>0.99 bcm</b> (50% renewable gas target)
Sweden	<b>0.94 bcm</b> (10 TWh)

**TOTAL 3.4 bcm**

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

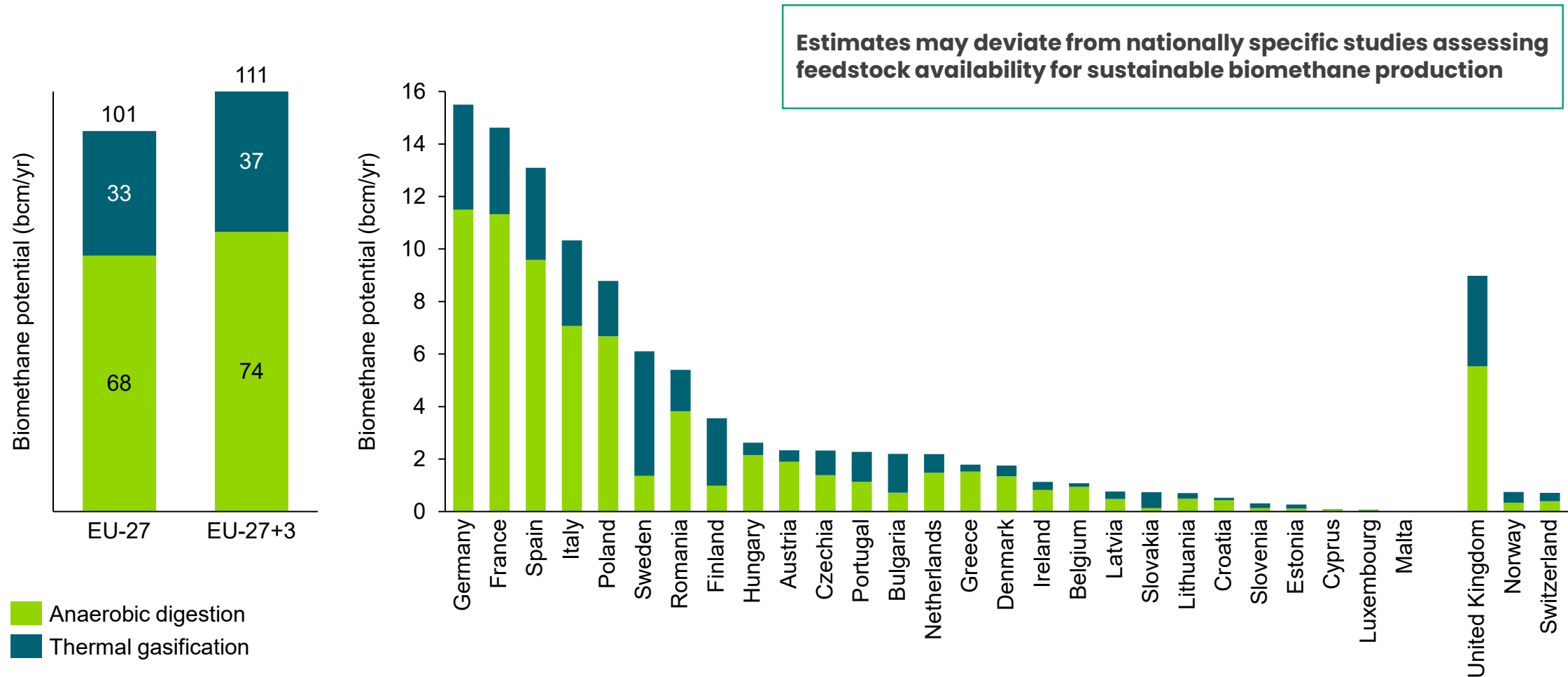
## Biomethane production potential in Europe

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





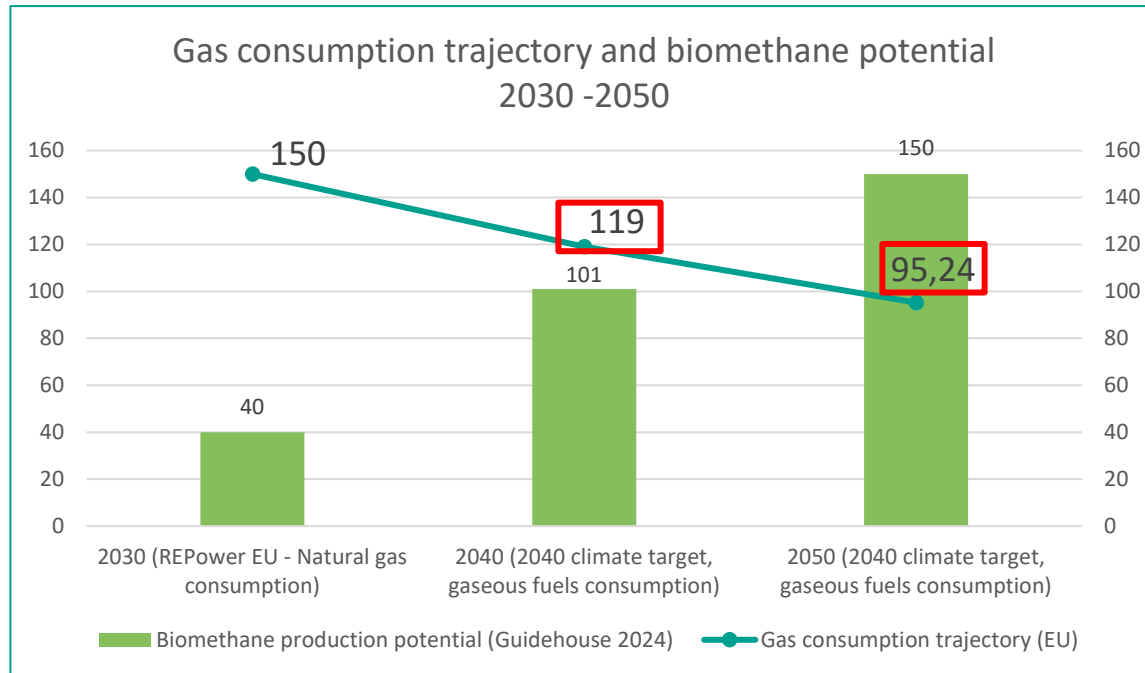
# Biomethane potential of 111 bcm/yr in Europe in 2040 - dominated by anaerobic digestion



# 2040 Climate Target Plan: Biogases role

**The Target Plan foresees a reduction in grid-injected gaseous fuels to 119 bcm by 2040**

(Natural gas, e-methane, biomethane)



**Biomethane's role is focused on maritime transport, industry and agriculture**



- 8% of transport fuels in 2040 & 16% in 2050
- EC projected 19 TWh biomethane in maritime transport in 2030. Focus on maritime likely to continue



- "Bioenergy" = approx. 465-580 TWh in 2040
- This includes solid biomass, biogases, biofuels and organic solid waste



- Anaerobic digestion to mitigate emissions from manure
- Nutrient loss prevention (digestate)



The background image shows a butterfly with orange and black patterned wings perched on a purple flower. In the background, a large industrial facility, likely a biogas plant, is visible under a clear blue sky. The entire image has a greenish-yellow tint.

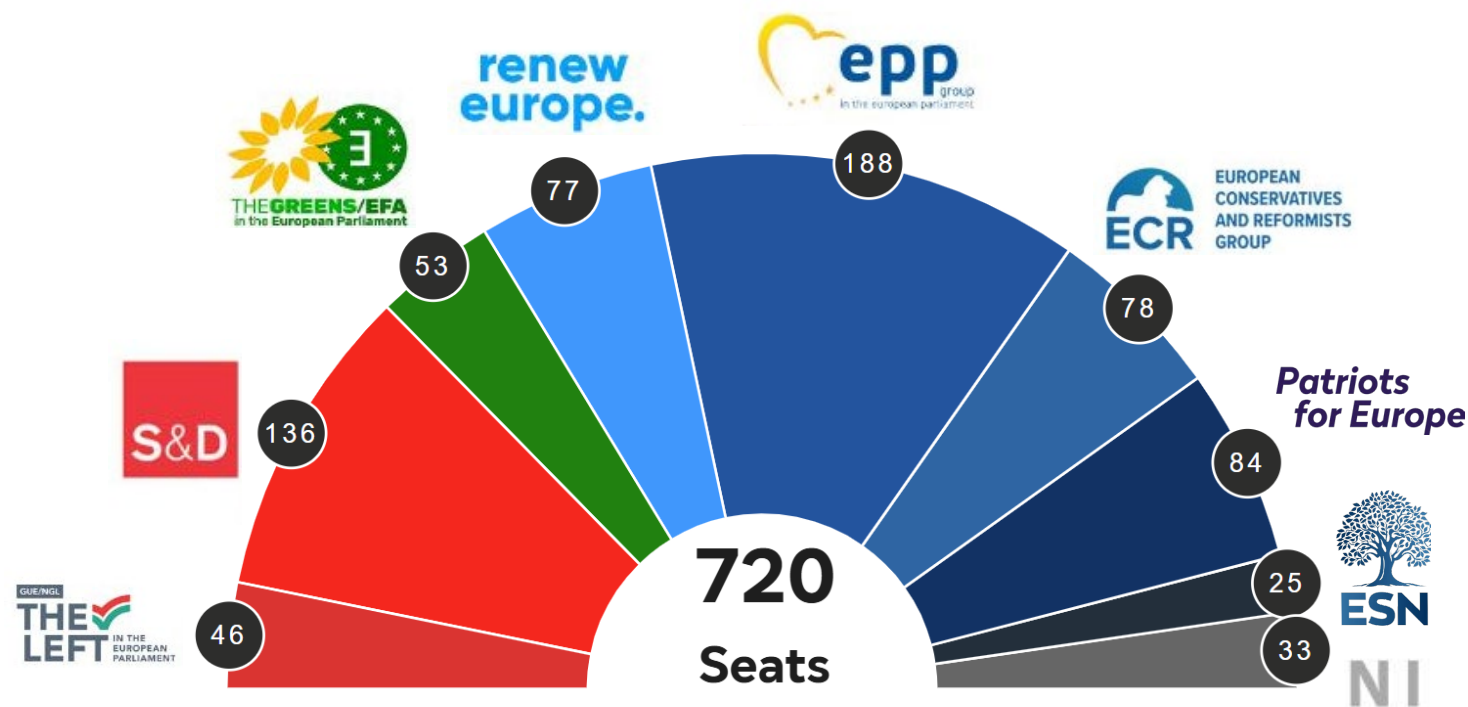
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# Election Results



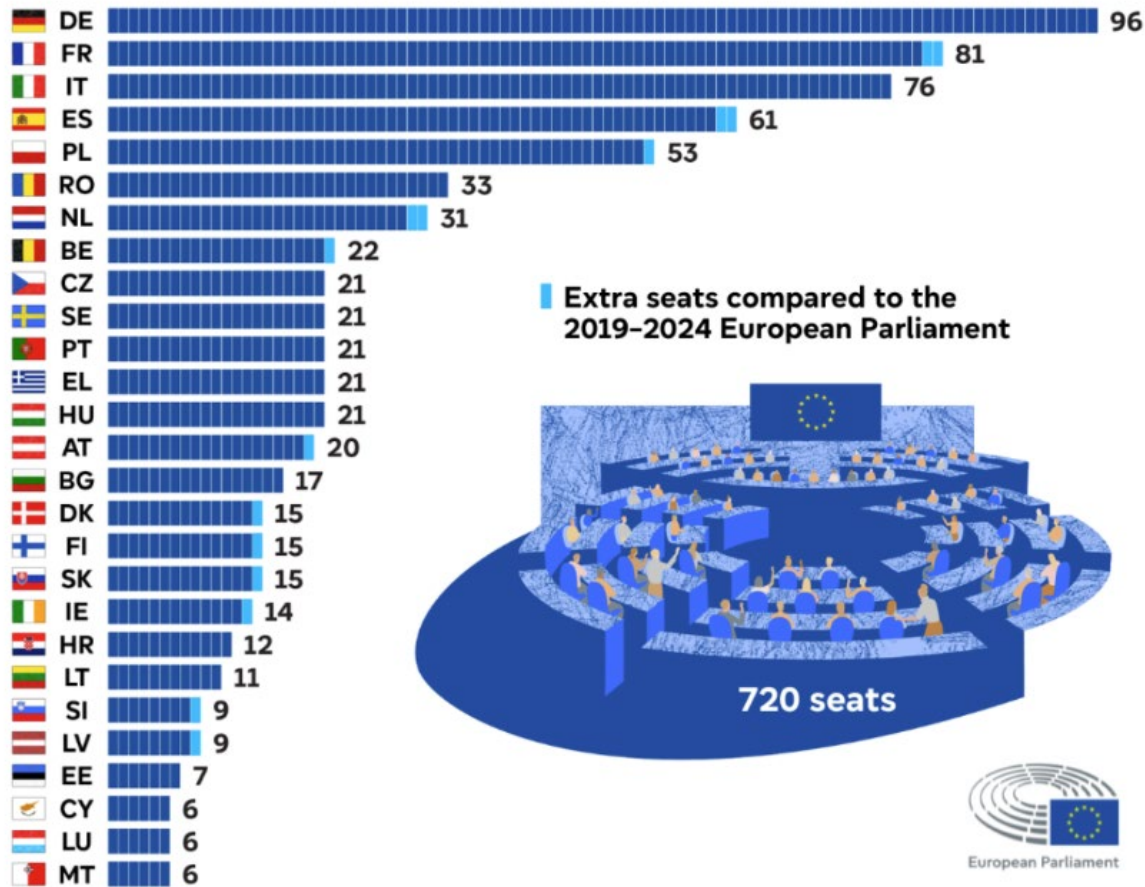
## Biggest Delegations per Political Group:

- EPP: CDU 31 
- PfE: FM 30 
- ECR: FdI 24 
- S&D: PD 21 

Political groups In the European Parliament	Number of seats	% of seats
<b>EPP</b> - Group of the European People's Party (Christian Democrats)	188 ●	26.11%
<b>S&amp;D</b> - Group of the Progressive Alliance of Socialists and Democrats in the European Parliament	136 ●	18.89%
<b>PfE</b> - Patriots for Europe	84 ●	11.67%
<b>ECR</b> - European Conservatives and Reformists Group	78 ●	10.83%
<b>Renew Europe</b> - Renew Europe Group	77 ●	10.69%
<b>Greens/EFA</b> - Group of the Greens/European Free Alliance	53 ●	7.36%
<b>The Left</b> - The Left group in the European Parliament - GUE/NGL	46 ●	6.39%
<b>ESN</b> - Europe of Sovereign Nations	25 ●	3.47%
<b>NI</b> - Non-attached Members	33 ●	4.58%

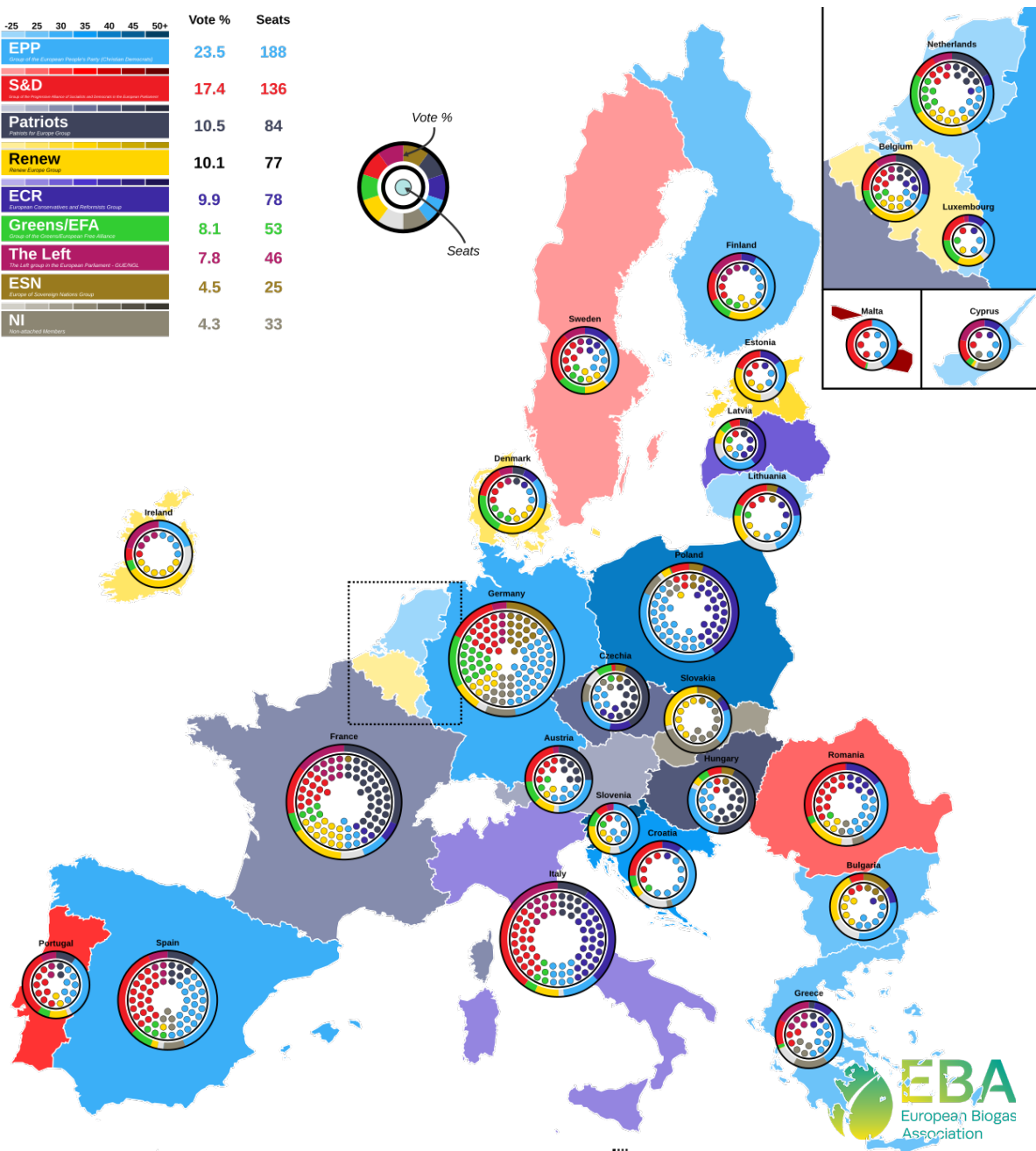


# Distribution of EP seats by MS

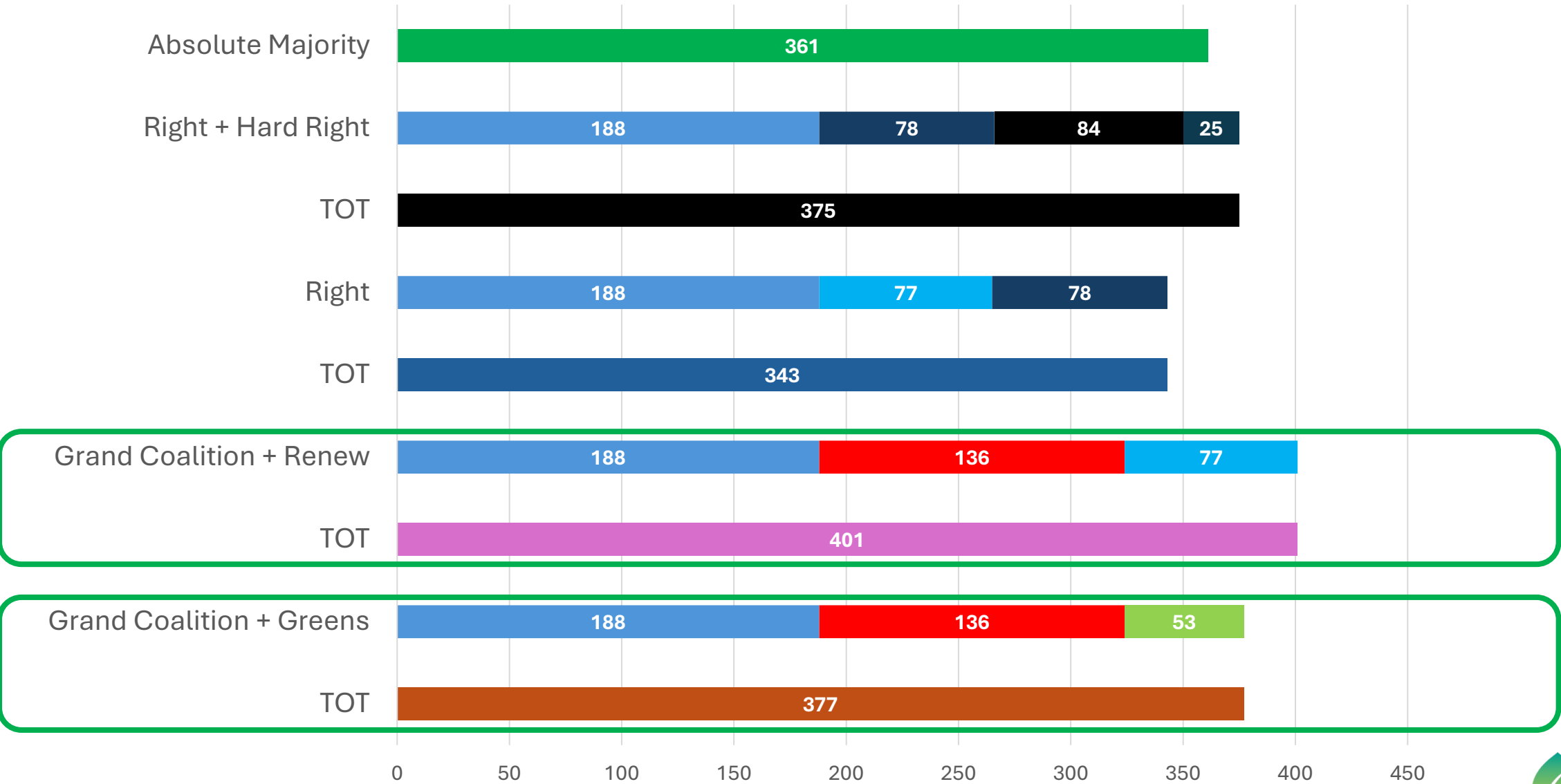


Extra seats compared to the 2019-2024 European Parliament

	Vote %	Seats
EPP <small>European People's Party (Christian Democrats)</small>	23.5	188
S&D <small>Socialists and Democrats (Socialists and Democrats in the European Parliament)</small>	17.4	136
Patriots <small>Patriots for Europe Group</small>	10.5	84
Renew <small>Renew Europe Group</small>	10.1	77
ECR <small>European Conservatives and Reformists Group</small>	9.9	78
Greens/EFA <small>Group of the Greens/European Free Alliance</small>	8.1	53
The Left <small>The left group in the European Parliament - GUE/NGL</small>	7.8	46
ESN <small>European Socialist Network Group</small>	4.5	25
NI <small>Non-attached Members</small>	4.3	33



# Possible coalitions – EP seats' share

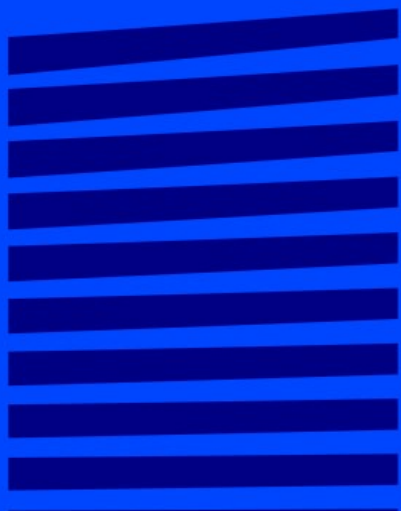




## EUROPE'S CHOICE

POLITICAL GUIDELINES  
FOR THE NEXT EUROPEAN COMMISSION  
2024–2029

**Ursula von der Leyen**  
*Candidate for the European Commission President*



Strasbourg

## UvL II

PROSPERITY

SIMPLIFICATION

DEFENCE

SOCIETY

QUALITY OF LIFE (FOOD + ENVIRONMENT)

LEADERSHIP

18 July 2025



# DRAGHI's REPORT



## 3 Action Areas:

- 1 Europe must refocus its collective efforts in closing the innovation gap with US and PRC
- 2 Joint plan for decarbonisation and competitiveness
- 3 Increasing security and reducing dependencies



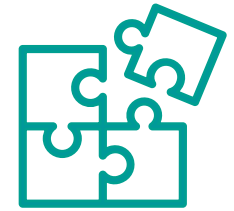
# What is standing in the way?



**Europe is lacking focus.** Common objectives, but not backed by setting clear priorities or following up with joined-up policy actions.



**Europe is wasting its common resources.** Large collective spending power, diluted across multiple different national and EU instruments



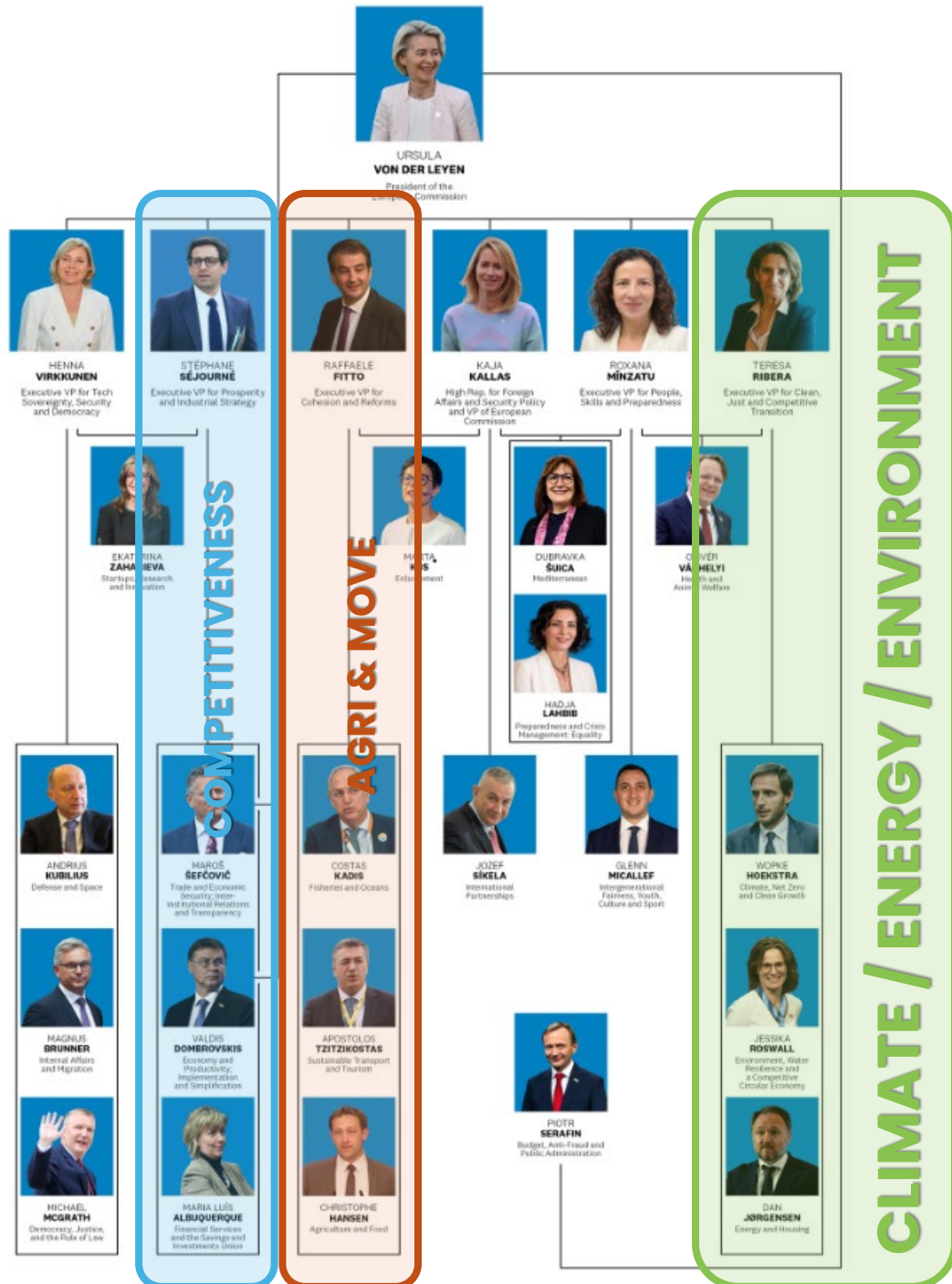
**Europe does not coordinate where it matters.**



## THE NEW EC TEAM:

« It's the economy, stupid! »

Competitiveness  
Industry  
Many overlaps



## Clean, Just and Competitive Transition

COMP

### Clean Industrial Deal

New State Aid Framework & simplification of State Aid

90% target by 2040

Lower energy prices

European Competitiveness Fund

Important Projects of Common Interest for most strategic sectors and tech

## Climate, Net Zero and Clean Growth

CLIMA

### Clean Industrial Deal

Industrial Decarbonisation Accelerator Act & Net Zero Infrastructure

### Industrial Carbon Management Strategy

Build-up **Single Marker for CO<sub>2</sub>** & CO<sub>2</sub> transport & storage

Create framework to phase out fossil fuels subsidies

**Amendment to CO<sub>2</sub> standards to include e-fuels**

**ETD revision**

## Environment, Water Resilience and a Competitive Circular Economy

ENV

**Circular Economy Act**, create market for secondary materials and establish single market for waste

Updated **Bioeconomy strategy**

Zero-Pollution ambition; market for sustainable products

No mention of Nitrates

## Energy and Housing

ENER

Implementation Green Deal + NECP assessment

Update & simplify the governance of the Energy Union

**Clean Industrial Deal + Action Plan for Affordable Energy Prices**  
**Strategy on Clean Energy Investment prioritising clean energy infrastructure**

Legal Framework on EU Grids to help electrification

**Phase out fossil fuels + Boost roll out ren & storage energy**

**Advance energy system integration** + Develop Citizens Energy Package

# Three Policies to keep an eye on for 2024–2029



## COMMON AGRICULTURAL POLICY

Largest single spending in the EU budget

- Feedstock
- Machinery and Capital Costs
- On-farm



## ENERGY AND CLIMATE TARGET 2040

Revision of EU energy governance

Target settings for 2040 for:

- Renewables
- Energy Efficiency
- Infrastructure
- GHG emissions savings



## INDUSTRIAL CARBON MANAGEMENT

Ensuring Uptake of NETs  
EC already evaluating potential of BioCO<sub>2</sub> production  
Unlocking value of BioCO<sub>2</sub> market



# THANK YOU!

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*Re-thinking our economy. Making the energy transition happen.*

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