

Biogas and the EU Situation

Biogas Denmark Conference, 1 December 2025

Harmen Dekker, CEO of the European Biogas Association

EBA and the sector in a nutshell



Representing the full European value chain



Socio-economic impacts of biogases value chain

>250,000

JOBS IN 2023

70,000 direct and 170,000 indirect

500,000

JOBS IN 2030

1.8 million

JOBS IN 2050



15,000 COMPANIES



INVESTMENTS IN THE
EUROPEAN BIOECONOMY

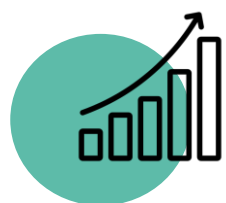


Solid EU VALUE CHAIN

CLEAN TECH leadership

SUSTAINABLE GROWTH

RURAL DEVELOPMENT



According to EBA's investment outlook, at least 25 billion € will be invested in Europe's biomethane by 2030. This generates an **additional benefit of 12 billion € yearly** to the European economy.

Biogases: Driving the energy transition 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

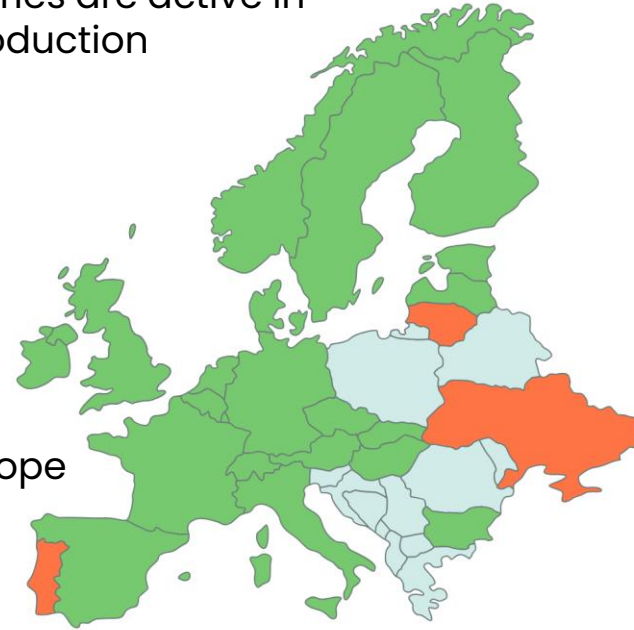
biomethane produced in Europe in 2023, with 6.1 bcm/year of installed capacity

25

European countries are active in biomethane production

18%

increase in biomethane produced in Europe



■ New producing countries in 2022 and 2023

Balanced distribution across end-uses:

23%

In transport

17%

In buildings



15%

In power generation

13%

In industry



Potential to replace

15%

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



29 Mton

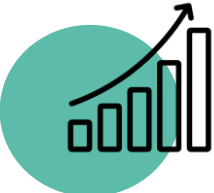
of bio-CO₂ produced from biogas and biomethane production



250,000

green jobs in Europe

Biogases covered 7% of EU gas demand in 2023

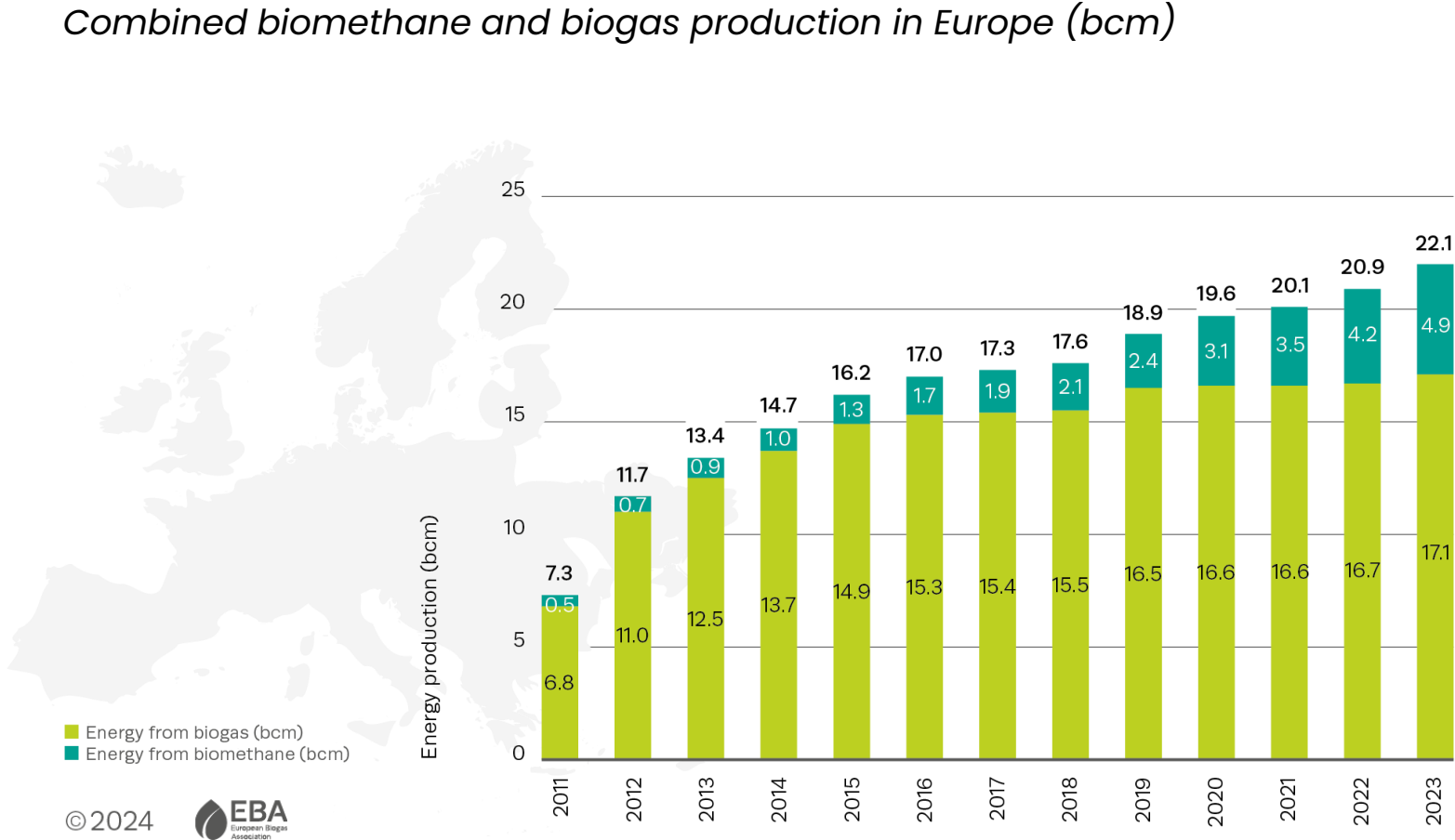


Combined biomethane and biogas production in Europe

22 bcm of combined biogas and biomethane production are produced today in Europe

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

Combined biomethane and biogas production in Europe (bcm)



© 2024



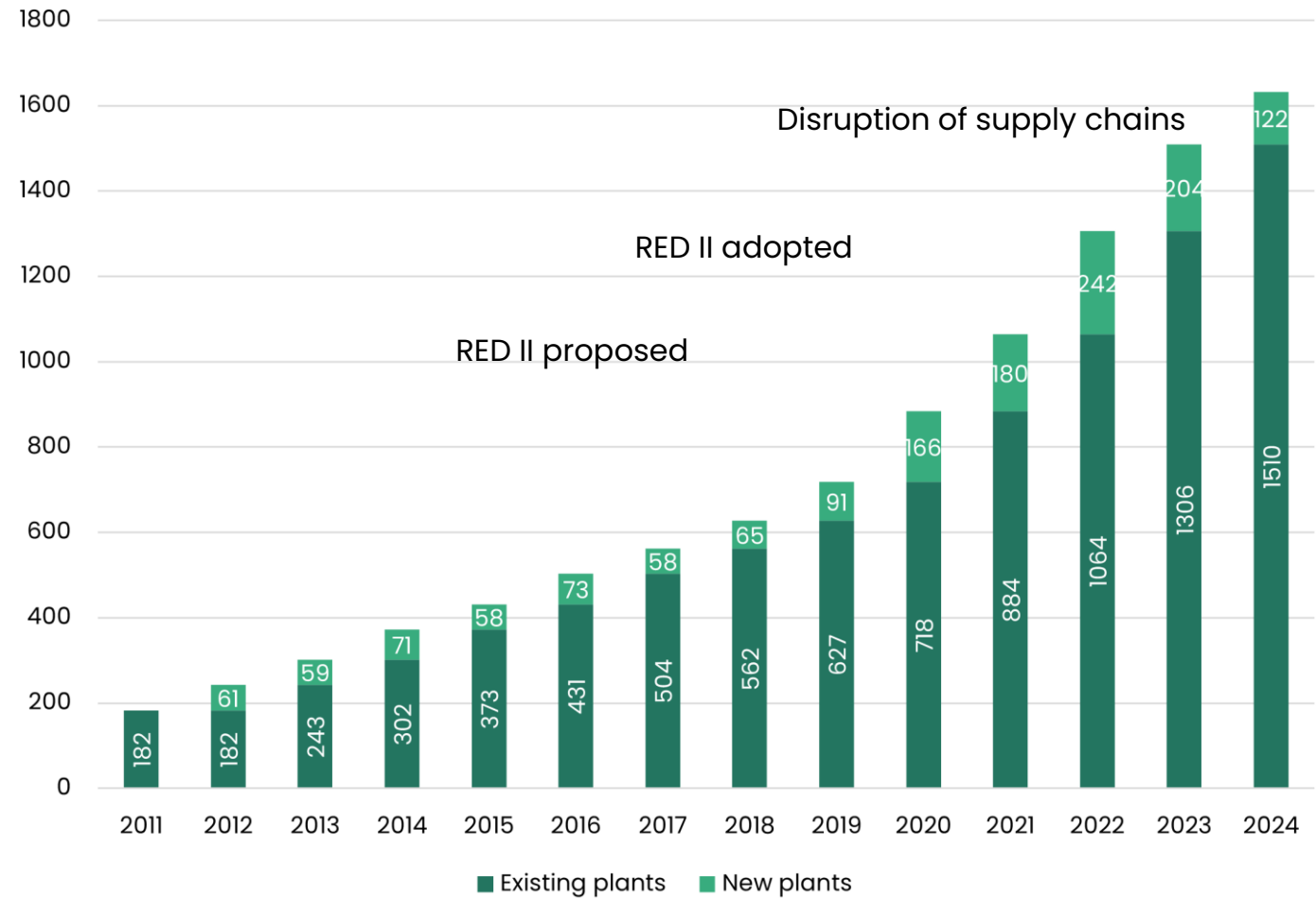
20% average biomethane growth per year



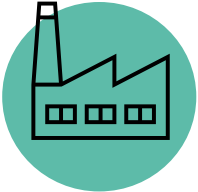
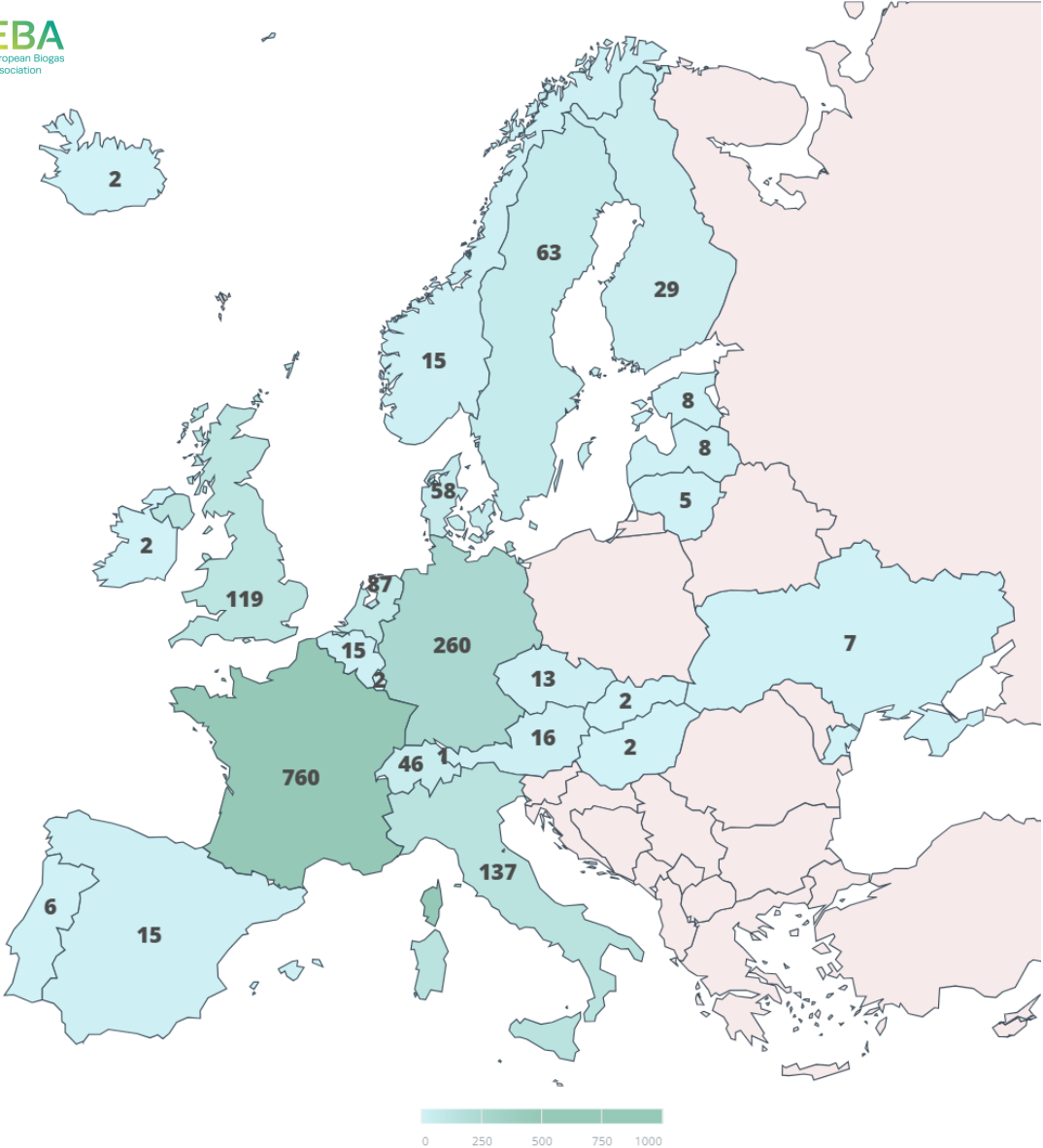
Noticeable increase after 2018 RED II adoption

Increase despite disruption of supply chains in 2020-2022

Slow down in 2024 due to approaching end of national support schemes



+1,650 biomethane of plants in Europe



Average size of biomethane plant in Europe:

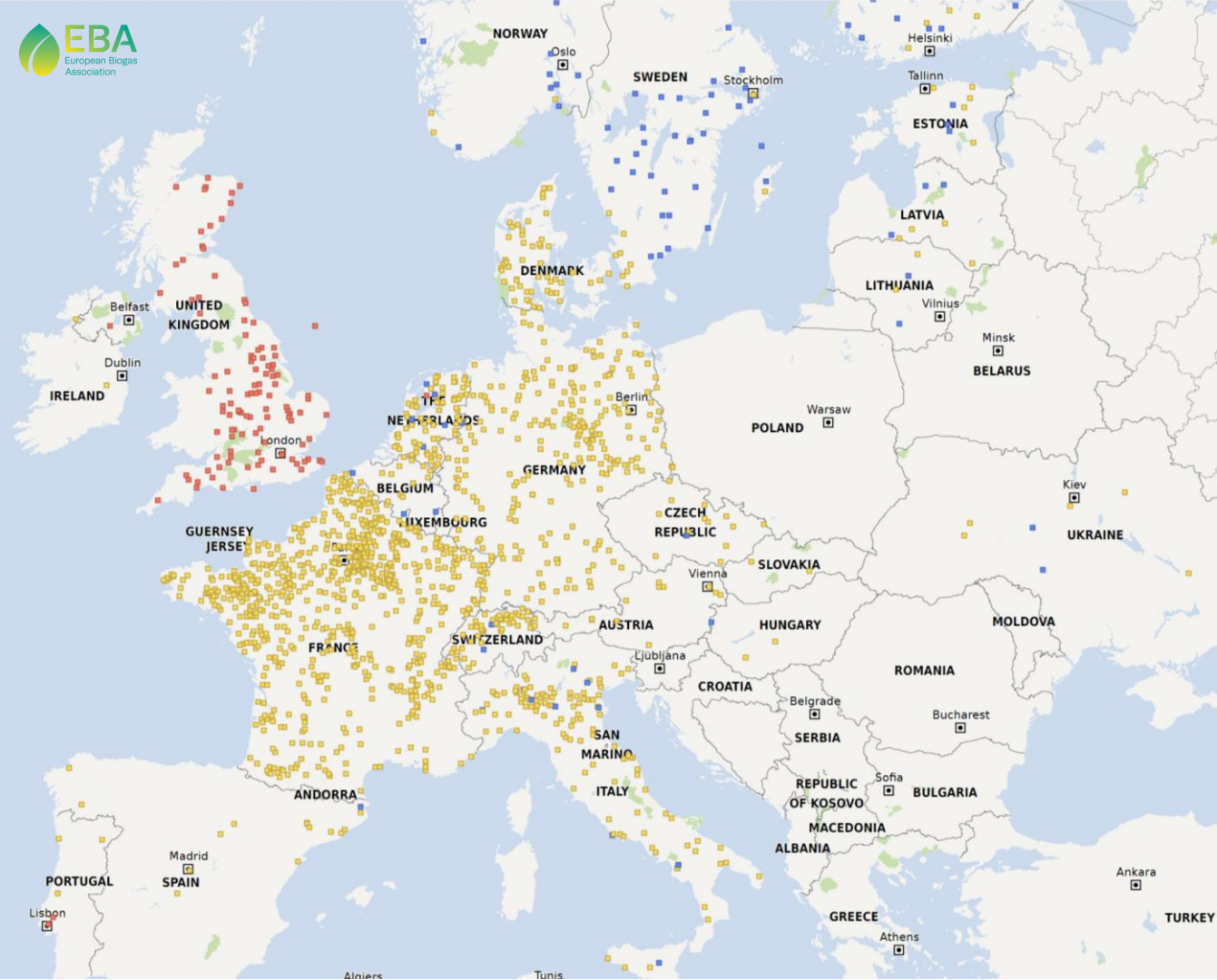
[483 Nm³/h]

Denmark:

[1431 Nm³/h]

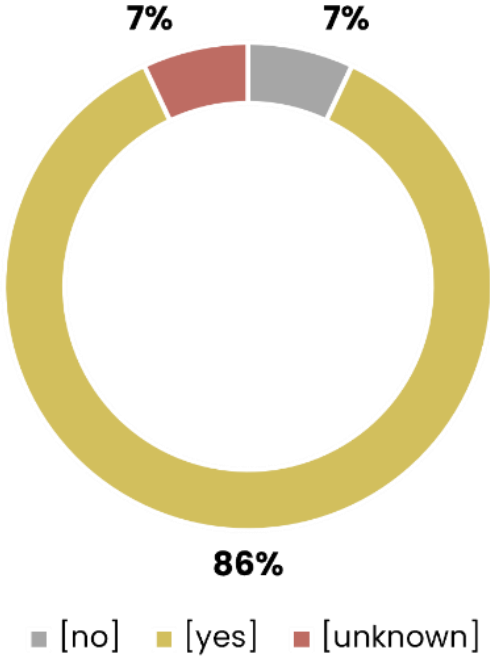


+85% of plants connected to the grid



[86%]

Connected to grid



Connection of biomethane plants to gas grid in Europe in 2025 (yellow – connected, blue – not connected, red – unknown).

€28 billion earmarked to be invested in biomethane

7.3
bcm/year

of added
biomethane
capacity in Europe
by 2030

900
Biomethane
plants

Planned to enter
operation in the
next 5 years.



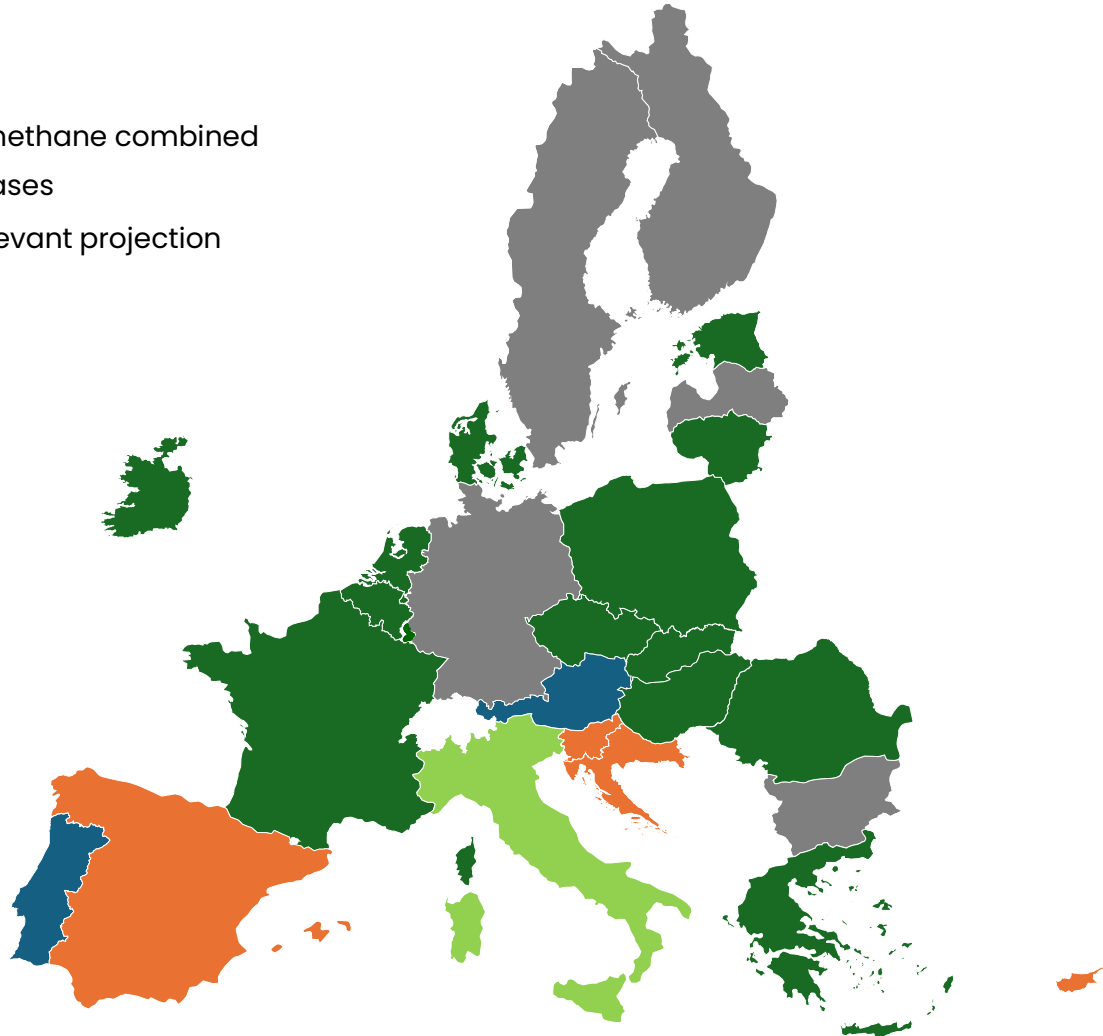
**Spain,
Denmark, UK**

Are the
forerunners with
the highest
investment
volume

NECPs 2030: How is the sector represented in the plans?

2025 NECPs include sectoral projections expressed in various terms:

- Biomethane
- Biogas
- Biogas & biomethane combined
- Renewable gases
- No sector-relevant projection



14 countries have a specific growth projection for biomethane (BE, CZ, **DK**, EE, FR, EL, HU, LU, NL, PL, RO, SK, IE, LT)

9 countries have a specific growth projection for biogas (BE, HR, CY, FR, EL, LU, PL, SI, ES)

In total, 21 countries have included specific projections for our sector in their NECPs

Biogases in updated NECPs

NECPs with 2030 biomethane projections		NECPs with 2030 biogas projections		NECPs with 2030 biogas & biomethane projections	
Belgium (Wallonia)	0.73 bcm (7,6 TWh)	Belgium (Flanders)	0,076 bcm (0,774 TWh)	Italy	5,5 bcm
Czechia	0.49 bcm	Croatia	/	Hungary	0,6 bcm
Denmark	1.4 bcm + additional 0.4 bcm (100% green gas in grid)	Cyprus	/	TOTAL	6,1 bcm
Estonia	0.076 bcm (0,8 TWh/a)	France	4,78 bcm		
France	4.2 bcm (44 TWh)	Greece	/		
Greece	0.2 bcm (2.1 TWh)	Luxembourg	0,03 bcm		
Hungary	0.18 bcm	Poland	0,9 bcm		
Ireland	0.54 bcm (5,7 TWh)	Slovenia	0,05 bcm (480 GWh)		
Lithuania	0.13 bcm (1.4 TWh)	Spain	1,9 bcm (20 TWh)		
Luxembourg	0,008 bcm (93 GWh)	TOTAL	7,75 bcm		
Netherlands	2 bcm				
Poland	1.483 bcm				
Romania	5% biomethane in grid				
Slovakia	0.3 bcm				
TOTAL	12,14 bcm				

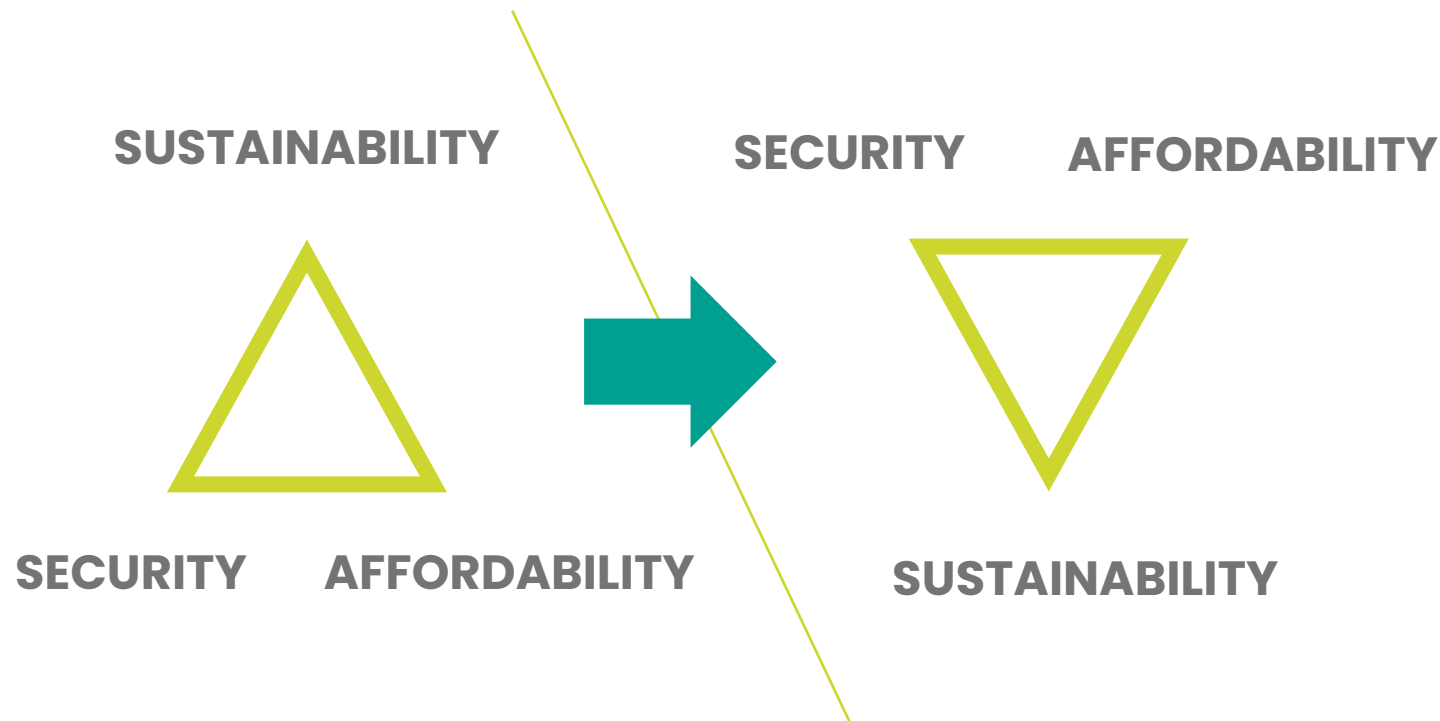
Total:
25,8 bcm
of biogas and biomethane by 2030

Outlook for renewable gases



Enabling a resilient transition

Balancing the **ENERGY TRILEMMA** while responding to great societal challenges: waste management, farming emissions abatement, affordability.



EU strategy 2025 based on competitiveness, resilience, sustainability

1

Clean Industrial Deal
March 2025

2

REPowerEU
May 2025

3

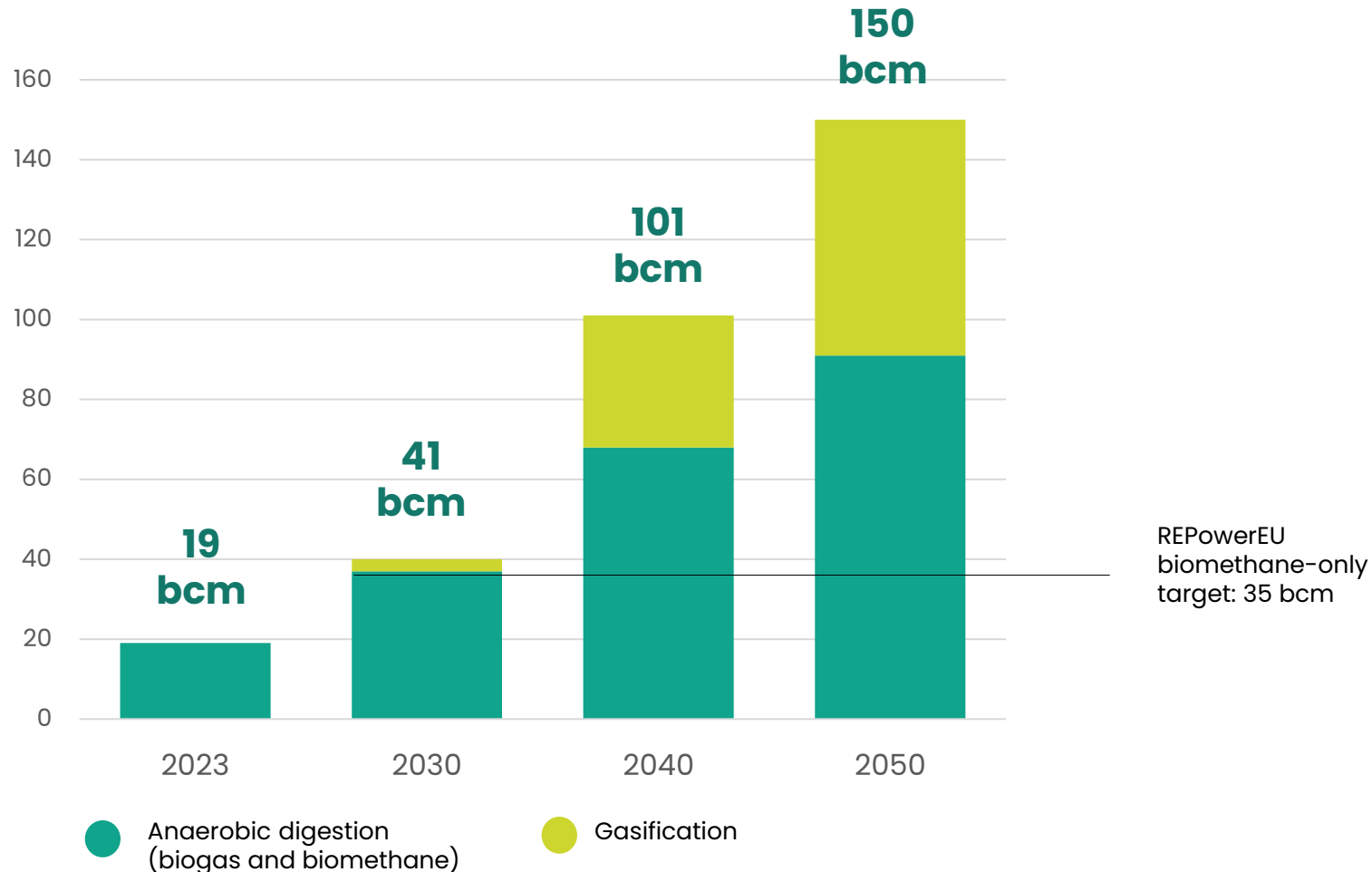
2040 Climate Target
July 2025

4

Bioeconomy Strategy
November 2025

Are there enough biogases?

Production potential in EU-27 until 2050 compared to existing production (bcm)



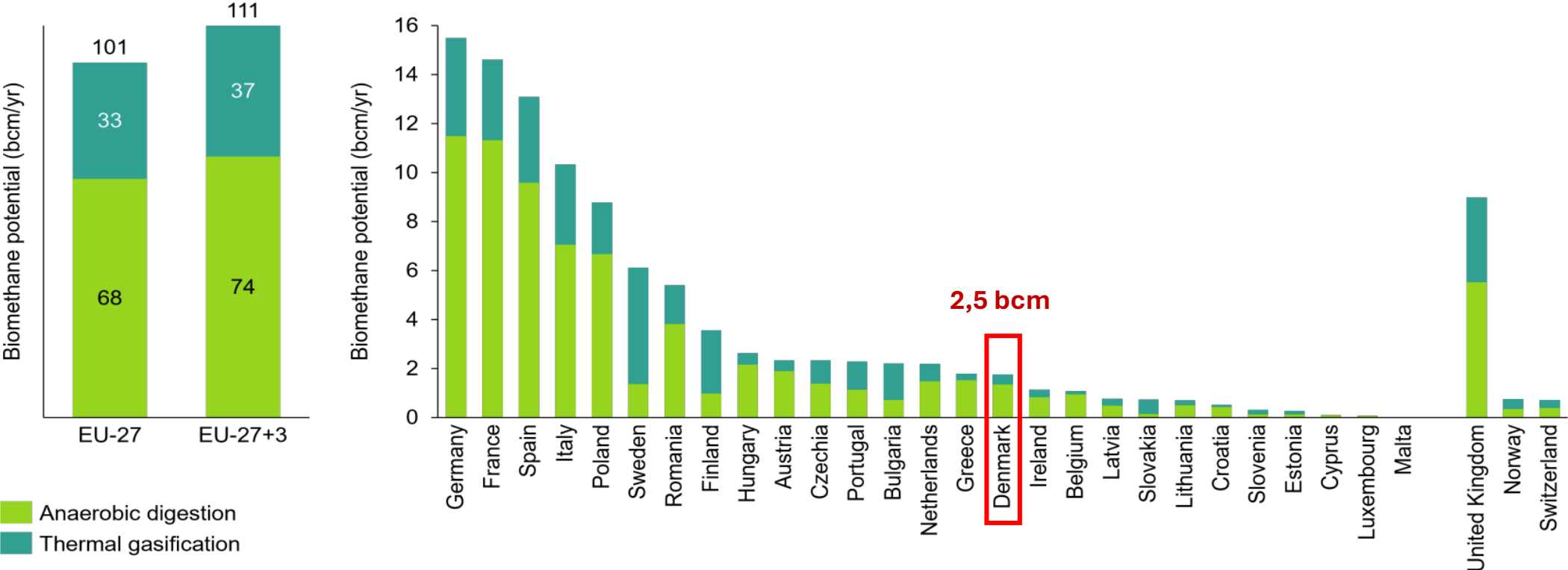
2040

Biogases production could supply **80%** of gaseous fuels demand

Sources: EC, Impact Assessment Report, SWD(2024) 63 final (2024); EBA, Statistical Report 2024 (2024); Gas for Climate, Biomethane Production Potentials in the EU (2022); Guidehouse, Biogases towards 2040 and beyond (2024).

Biomethane potential of 111 bcm/yr in 2040

Biomethane potential per country



* Production based on sustainable feedstocks such as agricultural residues, manure, sequential crops, municipal solid waste, wood waste and forest residues.

EBA Roadmap towards 2040

Biogases are at the center of **three circular pathways**:



Renewable energy



Organic fertilisers



Biogenic CO₂

EBA RECOMMENDATIONS TOWARDS 2040



Binding biogases target of 100 bcm by 2040



European Biogases Charter



National Pledges for Biogases

Legislation: Biogases in EU policy making



19 key European Commission dossiers impacting biogases in 2025

Initiative	Timing	Policy Objective	Nature
Competitiveness Compass	29/01/2025	Comp	non-leg
Clean Industrial Deal	26/02/2025	Comp	non-leg
European Climate Law amendment	Q1 2025	Sust	leg
Action plan on affordable energy	Q1 2025	Comp	non-leg
Union of Skills	Q1 2025	Comp	non-leg
Vision for Agriculture and Food	Q1 2025	Comp	non-leg
Roadmap towards ending Russian energy imports	Q1 2025	Comp	non-leg
First Omnibus package Sustainability	26/02/2025	Simpl	leg
Second Omnibus package Small mid-caps and removal of paper requirements	Q2 2025	Simpl	leg
Third Omnibus package Investment simplification	Q2 2025	Simpl	leg
Single Market Strategy	Q2 2025	Comp	non-leg
Common Agricultural Policy simplification package	Q2 2025	Simpl	leg
European Water Resilience Strategy	Q2 2025	Resil	non-leg
Revision of the Sustainable Finance Disclosure Regulation	Q3 2025	Simpl	leg
Sustainable Transport Investment Plan	Q3 2025	Comp	non-leg
Evaluation of the Public Procurement Directives	Q3 2025		non-leg
Industrial Decarbonisation Accelerator Act	Q4 2025	Comp	leg
Bioeconomy Strategy	Q4 2025	Comp	non-leg
European Affordable Housing Plan	Q4 2025	Soc	non-leg

EU strategy in 2025: competitiveness, resilience, sustainability

1

Clean Industrial Deal
March 2025

Outlining the European Commission plan to address industry competitiveness concerns and economic resilience, while still aspiring to reach EU decarbonisation targets.

2

REPowerEU
May 2025

Strategic framework to phase out the EU's remaining dependence on Russian fossil fuels: European Commission forecasts that gaseous fuels, including biomethane and biogas, will remain essential to 2040s and 2050s EU energy mix.

3

2040 Climate Target
July 2025

2040 climate target reaffirms EU's determination to tackle climate change and shape path after 2030, to ensure the EU reaches climate neutrality by 2050.

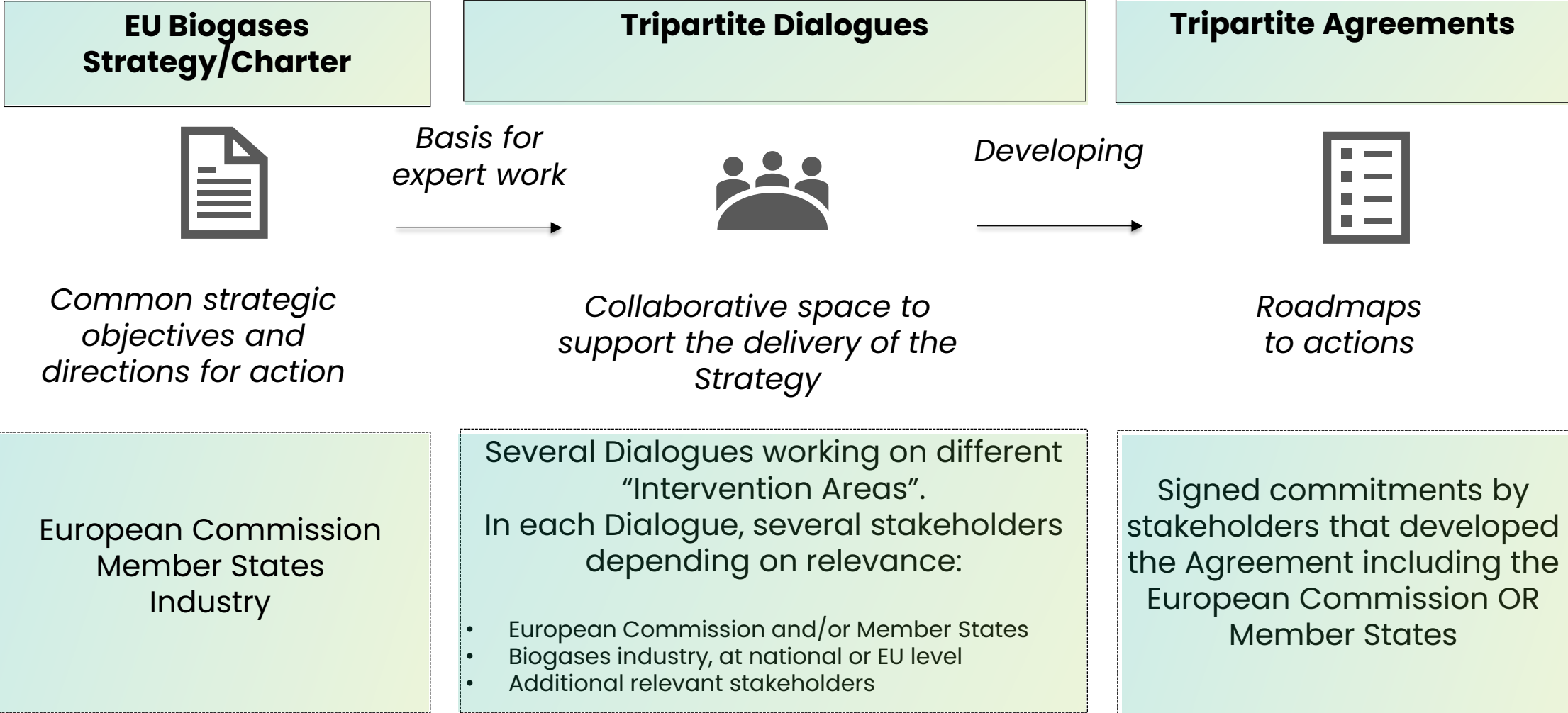
4

Reviewed Bioeconomy Strategy
November 2025

The strategy will focus on strengthening circularity and sustainability, contributing to the decarbonisation of the economy.

2040: EBA calls for a binding biogases target of 100 bcm by 2040

Biomethane Tripartite Agreements



Conclusions



Some critical issues

1

Full recognition and support

- Targets on biogases showcasing scalability
- Acknowledgement of biogases cost-competitiveness

2

Address bottlenecks

- De-risk investments in clean technologies
- Speed-up permitting
- Facilitate grid injection

3

Resource valorisation

- Valorise use of digestate as organic fertiliser
- Encourage use of bio-CO₂ as a replacement of fossil CO₂ in industrial processes

WEBINAR

EBA Statistical Report 2025



Register here

Fuelling Europe's clean
path to independence

10 DECEMBER 2025

10:00 – 11:00 CET



info@europeanbiogas.eu
www.europeanbiogas.eu



Harmen Dekker

dekker@europeanbiogas.eu

Follow us on



[LinkedIn](#)



[Instagram](#)



[Youtube](#)



[Website](#)

www.europeanbiogas.eu