



**BIOGAS
WORLD**



Biogas Community

PREVIEW Biogas and Biomethane Report

Market Intelligence

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BENELUX

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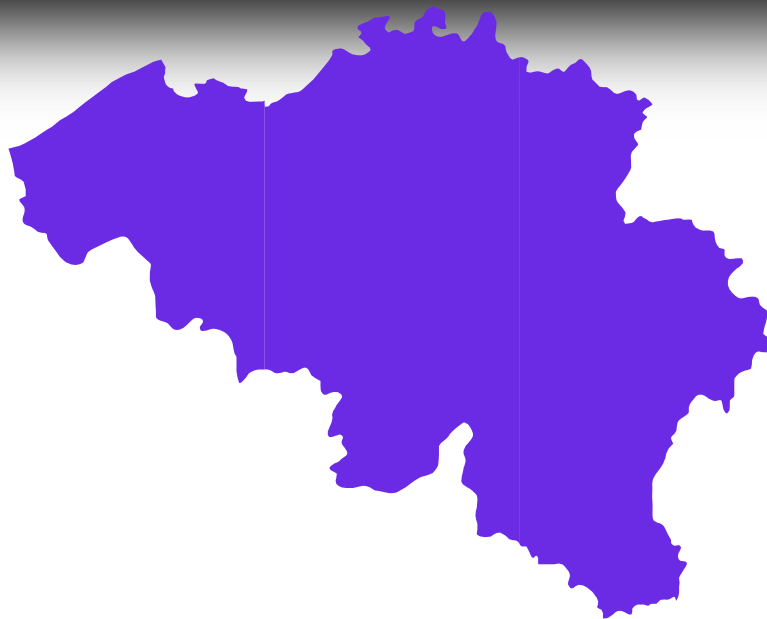
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Belgium - Current Market Overview

As the European biomethane industry developed, the Belgian biogas market continued to focus primarily on the production of electrical power using CHP systems. Overall, currently there are over [REDACTED] biogas facilities across the country, most of which are in the Flanders region. Of this total, there are approximately [REDACTED] biomethane facilities, the majority of which have been commissioned since 2020.



Recent Developments

Belgium's transmission system operator, Fluxys, in collaboration with the Flanders and Walloon Biogas Associations, has developed a tool dividing the country into [REDACTED]

Market Particularities

The Belgian market is split between its two major cultural regions, Wallonia in the south, and Flanders in the North.

Flanders

The development of new biomethane facilities in Flanders has been inhibited in recent years by cumbersome permitting processes. As a result, the region has only [REDACTED] of biomethane output. A recent study from

Wallonia

There is currently around 0.5 GWh/y of biomethane capacity in Wallonia. The region's new climate plan and framework for a regional emissions trading system (ETS) is aiming to increase this output to approximately 1.5 TWh/y.

Belgium

As presented on the left, there remains a significant potential for the development of manure digester systems in Belgium. Combined with other potential farm feedstocks, such as agricultural residues and intermediate crops, this brings the potential output of farm systems to approximately...

Figure 1. Biomass Potentials in Belgium, TWh



Luxembourg - Current Market Overview

Luxembourg has been steadily increasing its renewable energy output, and like much of Europe, has looked to biogas and biomethane to decrease its foreign dependence for energy.

There are approximately anaerobic digesters across Luxembourg and of these facilities are...

Netherlands - Current Market Overview

There are approximately [REDACTED] biogas facilities across the Netherlands, over [REDACTED] of which were upgrading biogas to biomethane. The majority of biomethane is injected into the gas grid (nearly [REDACTED] TWh).

Additionally, Netherlands has its own national renewable gas registry, operated by [REDACTED]

Stimulering duurzame energieproductie en klimaattransitie (SDE++)

Sustainable Energy Transition Incentive Scheme (SDE ++) will stimulate the roll-out of renewable energy and CO2-reducing the amount of



Feedstock Potential


Estimates place the sustainable development of feedstocks in the Netherlands to a 2030 potential of  bcm. There is significant potential for continued growth to convert agricultural feedstocks into biogas across the Netherlands. Other feedstocks with considerable potential include industrial wastes, including industrial wastewater.

Figure 4. Biogas Potential in the Netherlands (bcm)



Figure 5. Biomass Potential in the Netherlands, TWh



Upgrading Snapshot

The figure on the left has been updated with BiogasWorld's latest figures provided by upgraders operating in the Netherlands

Membrane separation is the most used upgrading technology in Netherlands, being used in [REDACTED] plants.

Companies that work in this market are [REDACTED]

Figure 6. Biogas Upgrading in Netherlands, Number of Plants



Cost of Feedstocks in the BENELUX Region

The cost of feedstocks is relatively similar across the BENELUX region, with agricultural biomass in Luxembourg experiencing the...

Figure 7. Cost of Feedstock, €/ton



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