



PREVIEW RNG Report

Market Intelligence

February 2024

Canada

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Notice to Readers

Energy Conversion

The report uses a number of energy units to present the information due to the fact that different sources of information may use various units of energy. When reading the report, you will find helpful the following table containing approximate energy conversions for biomethane as reference.

Table 1. Energy Conversion

Unit of Energy	Conversion
1 PJ	1 000 000 GJ
	0,9478 TBTU
	947 817 MMBTU
	277 780 TWh
	26 518 000 m3 Biomethane (RNG)
	0,9478 Bcf

Abbreviations

PJ	Petajoule
GJ	Gigajoule
TBTU	Trillion British Thermal Units
MMBTU	Metric Million British Thermal Unit
TWh	Terra Watt hours
Bcf	Billion cubic feet



Canada

Market Overview

Current Market Overview

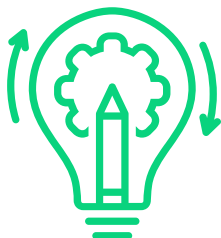
There are currently 10 operating facilities upgrading biogas to RNG (which represents a 10% increase over 2022). Quebec, Ontario, and British Columbia all have 3 facilities each, followed by Alberta with 2 upgrading sites.

The list of Canadian RNG facilities can be found in Biogas Community, Tab Resources: Market Intelligence.



Current Market Overview

Projects in Development



There are around [REDACTED] plants in development or under construction, and a [REDACTED] more at an earlier stage of concept development.



Market Size & Potential



National RNG capacity in 2022 was approximately [REDACTED] PJ, and is expected to rise to [REDACTED] PJ by 2026.



Policy Development



An Associations and its partners have proposed a Clean Gas Standard, which would aim to increase the volume of carbon neutral gases, including biogas, RNG, bio-synthetic gas, and low-carbon hydrogen.

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Upgrading Snapshot

Providers of upgrading technologies in existing RNG plants in Canada are as follows:

- Greenlane (water scrubbing, PSA, & membrane) – 7 plants



Figure 1. Biogas Upgrading in Canada, Installed Units



Provincial Overview

The following provinces were selected for overview due to their increased market development within Canada:

British Columbia

The potential supply of RNG within BC is expected to increase to █████ PJ in 2030, and ABC PJ by 2050. Under the current legislated scenario, British Columbia is predicted to consume just over █████ PJ of RNG in 2025, increasing to around █████ PJ in 2030.

Figure 2. below shows the BC LCFS credit market, both in the annual volume of credits on the left and the average price per credit over the course of the year on the right.

Figure 2. BC LCFS Annual Credit Volume and Prices

A photograph of several tall, vertical industrial distillation columns made of stainless steel, connected by a network of pipes. The scene is set against a sunset sky with soft orange and blue hues. A black metal fence is visible in the foreground. In the bottom right corner, there are three decorative, wavy green lines.

Canada

Market Drivers

Québec - Market Drivers

- Québec's 2030 Plan for a Green Economy (PGE 2030)
 - Commitment to reduce GHG emissions by [REDACTED] by 2030
 - Use for RNG for greening the natural gas grid and for heating

A close-up photograph of a gas stove with several blue flames. The stove is dark-colored, and the flames are bright blue. In the bottom right corner, there is a green graphic consisting of several concentric, wavy lines. The text "Gas Utilities in Canada" is overlaid in the center of the image.

Gas Utilities in Canada

Canada: Gas Utilities and RNG Quality Specifications

Overall, major developments in Canadian RNG sector are happening in [REDACTED] and [REDACTED]. Minor developments are beginning in [REDACTED]. The table below presents the information on gas utilities active in the sector and on their RNG programs.

Enbridge



Province: Ontario

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