

Unleashing Biomethane's Potential

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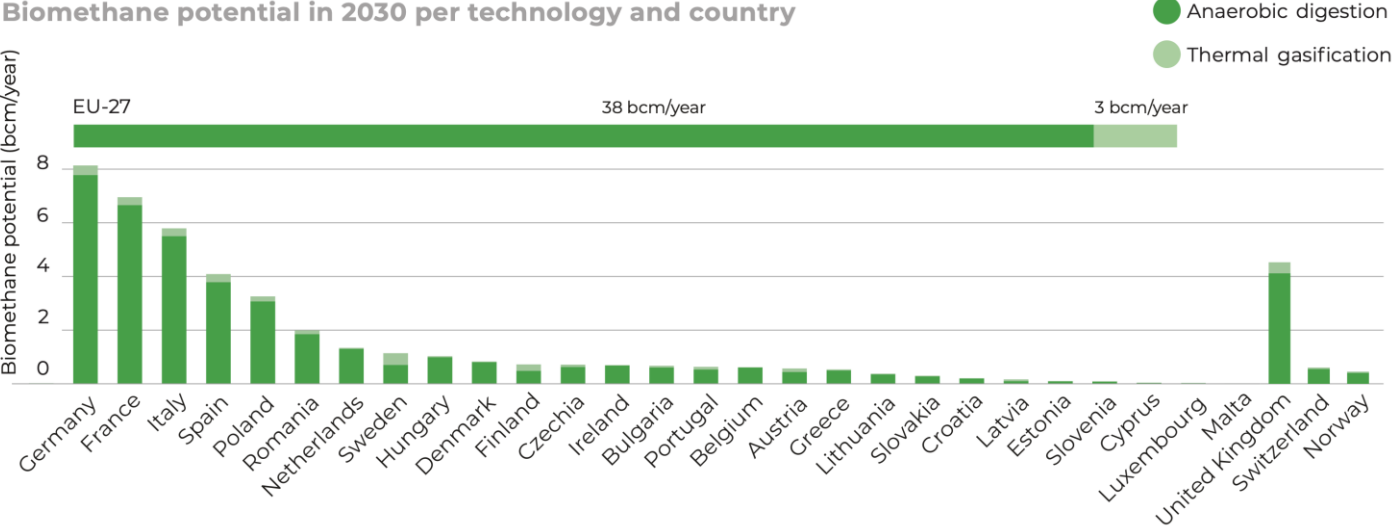


Summary

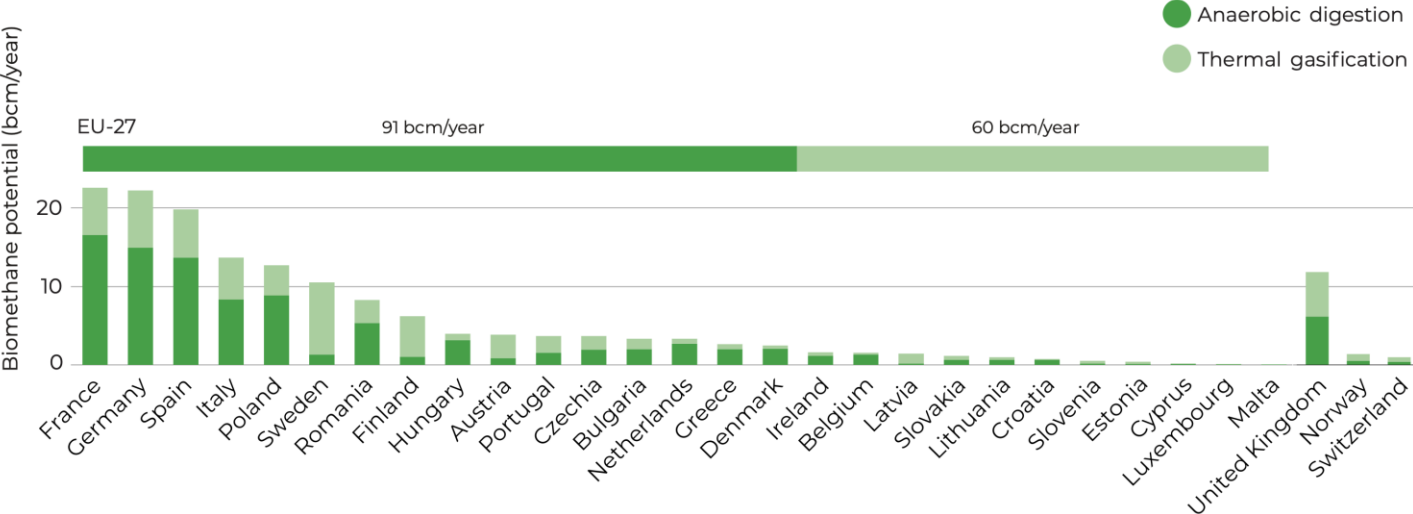
- ▶ Biomethane Potential
- ▶ Biogenic CO₂ as a By-product
- ▶ Challenges to be addressed
- ▶ Summary

Biomethane Potential

Biomethane potential in 2030 per technology and country



Biomethane potential in 2050 per technology and country



Pathway to Never Venting Biogenic CO₂

- ▶ Feedstock & Controls on Quality
- ▶ End of Waste Management
- ▶ Markets for CO₂ - Food Grade & Emerging
- ▶ Value in CO₂ Now & the Future
- ▶ Proving BECCS
- ▶ Biogenic CO₂ and its management from biomethane plants is key to Net Zero

Challenges to be Addressed

- ▶ Gas Networks & Potential for Biomethane have become disconnected
- ▶ Hydrogen is not the only Renewable Gas
- ▶ Unlocking Network Capacity is Key
- ▶ Biomethane to Grid needs Safety plus Agility
- ▶ Time to revisit priorities & unlock more potential

Conclusion

- ▶ The potential for Biomethane remains Enormous
- ▶ Aligned to Biogenic CO₂ it is a key to achieving Nett Zero
- ▶ Future Pathways are to clarify but a long-term gas grid would help
- ▶ Nett Zero needs all parties pulling in the same direction