



AD/Biogas New Investment Update

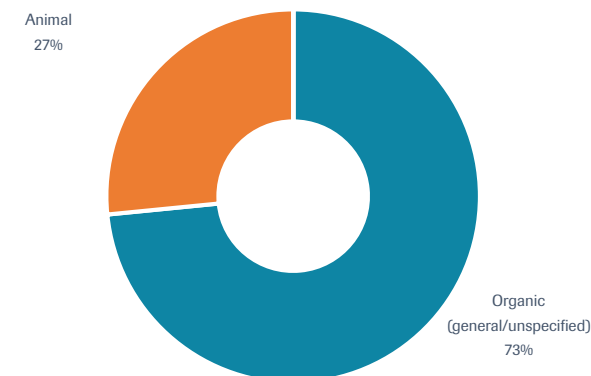
AcuComm reported on seven new anaerobic digestion/biogas projects in April 2017.

These have a combined value of US\$118.2 million. Estimated feedstock tonnage is 1,011,231 tonnes, and power output is 17 MW, equal to an annual average of 144,462 tonnes and 2 MW per project.

Organic (general/unspecified) was the leading feedstock type for projects reported this month, accounting for US\$87 million, equal to 73% of the total.

The Netherlands was the leading country in April 2017, accounting for three projects with a total value of US\$46 million.

Project Values by Feedstock Type (April 2017)



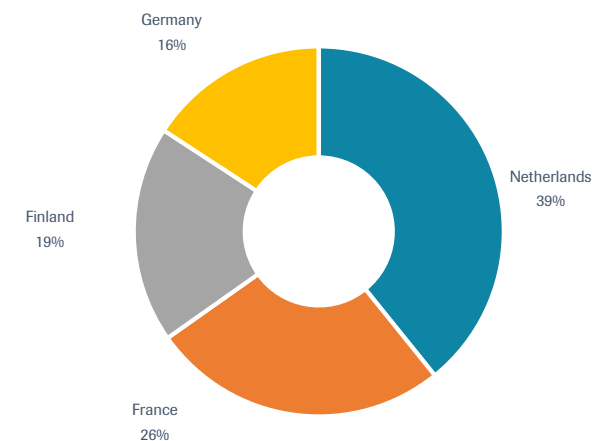
Source: AcuComm database, 30th April 2017

New AD/Biogas Projects Reported in April 2017

Project Description	Principal Waste Type	Location
Construction of a biogas upgrading facility.	Organic (general/unspecified)	Tweede Exloërmond, Drenthe, Netherlands
Construction of a biowaste fermentation plant.	Organic (general/unspecified)	Cologne, Germany
Construction of a dry fermentation biogas plant.	Animal	Haukivuori, Finland
Construction of an AD plant.	Animal	Deurningen, Netherlands
Construction of an AD plant.	Animal	Vriezenveen, Netherlands
Construction of an AD plant.	Organic (general/unspecified)	Brie-Comte-Robert, Seine-et-Marne, France
Installation of a 'plug and play' biogas plant.	Organic (general/unspecified)	Parainen, Finland

Source: AcuComm database, 30th April 2017. Click the project description for more information on each project.

Leading Countries by Value (April 2017)



Source: AcuComm database, 30th April 2017



This brings the total for the twelve month period (ended April 2017) to 148 projects, worth US\$3,515 million or US\$24 million each.

Total feedstock capacity for these projects is 18.8 million tonnes, equal to 127,015 tonnes on average and 397 tonnes per day per project.

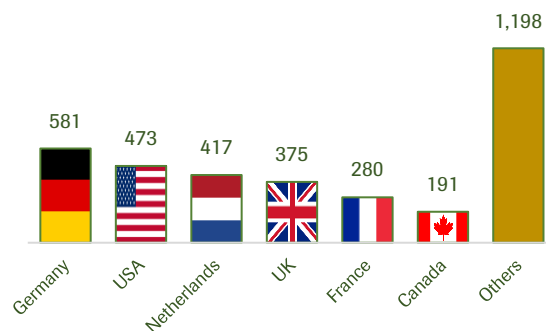
Total power generation is 399 MW, equal to 3 MW per project.

All AD/Biogas Projects Reported by Feedstock Type (May 2016 – April 2017)

	Projects	Value (US\$m)	Average Value (US\$m)	Capacity (tonnes)	Average Capacity (tonnes)	Average Tonnes Per Day	Average Power (MW)	Average Power (MW)
Animal	37	621	17	9,292,791	251,157	785	70	2
Food	19	329	17	786,221	41,380	129	42	2
Industrial	1	40	40	71,581	71,581	224	6	6
MSW	3	108	36	203,306	67,769	212	5	2
Organic (general/unspecified)	31	877	28	1,941,517	62,630	196	78	3
Plant biomass (waste)	22	267	12	958,271	43,558	136	64	3
Sewage/wastewater	32	938	29	5,300,436	165,639	518	117	4
Wood	3	335	112	244,108	81,369	254	16	5
Total	148	3,515	24	18,798,231	127,015	397	399	3

Source: AcuComm database, 30th April 2017. See www.acucomm.net for more details

Leading Countries for AD/Biogas Investment (US\$m)



Source: AcuComm database, 30th April 2017. Opportunities exist across the world. In the last twelve months, the USA has accounted for US\$473 million or 13% of the total. The European market is even larger, accounting for US\$2,374 million or 68%. Leading European markets are Germany, the UK, the Netherlands and France.

This graph displays the current operational status of all AD/Biogas projects reported on in the last twelve months. Investments worth US\$600 million (17%) are operational, while US\$1,022 (29%) million are under construction. The largest proportion are in various stages of planning, at US\$21,892 million or 54% of the total. The market is therefore dynamic, with new investment opportunities occurring all the time.

Recent Project Values by Operational Stage (US\$m)



The heatmap to the right displays the locations of all the AD/Biogas projects currently held in the AcuComm database since 2012, where a location is known. The darker the colour the greater the overall level of investment.