



# AD/Biogas New Investment Update

AcuComm reported on nine new anaerobic digestion/biogas projects in August 2017.

These have a combined value of US\$1,163 million. Estimated feedstock tonnage is 1,095,584 tonnes, and power output is 30 MW, equal to an annual average of 121,732 tonnes and 3 MW per project.

Sewage/wastewater was the leading feedstock type for projects reported this month, accounting for US\$1,081 million, equal to 93% of the total.

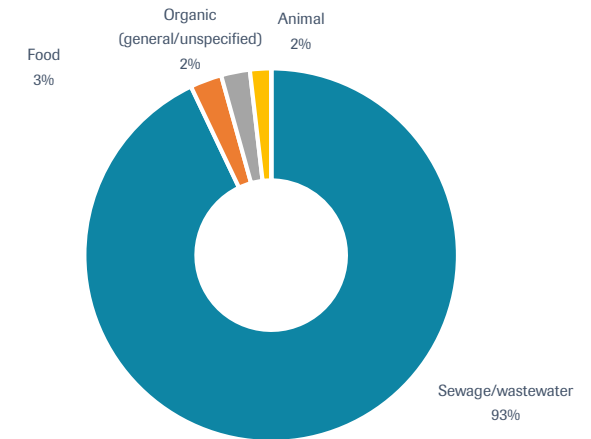
The USA was the leading country in August 2017, accounting for two projects with a total value of US\$952 million. Much of this was accounted for by a major biosolids digester project in San Francisco.

## New AD/Biogas Projects Reported in August 2017

Project Description	Principal Waste Type	Location
Construction of a 48,500 tpa AD plant.	Food	Spondon, Derbyshire, UK
Construction of a biogas plant.	Organic (general/unspecified)	Inzinac-Lochrist, Morbihan, France
Construction of a biosolids digester facilities project.	Sewage/wastewater	San Francisco, CA, USA
Construction of a new anaerobic digester at wastewater treatment plant.	Sewage/wastewater	Pleasanton, CA, USA
Construction of an €8.5 million AD plant.	Organic (general/unspecified)	Oude-Tonghe, Netherlands
Construction of an AD plant.	Sewage/wastewater	Mu'ta Mazar, Karak, Jordan
Construction of an advanced AD plant.	Sewage/wastewater	Stoke-on-Trent, Staffordshire, UK
Construction of livestock waste-fuelled biogas plants.	Animal	Veneto, Lombardia and Southern Italy, Italy
Installation of biogas system at new wastewater treatment plant.	Sewage/wastewater	Al Khobar, Saudi Arabia

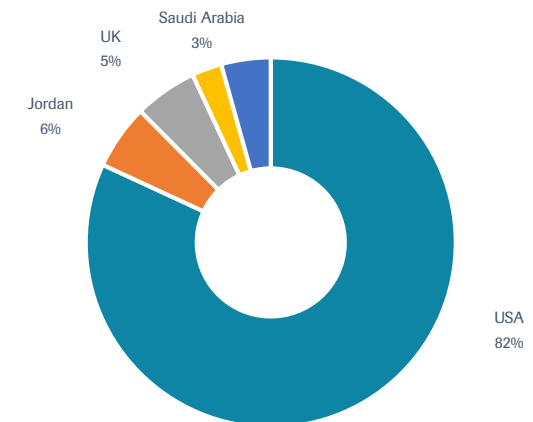
Source: AcuComm database, 31<sup>st</sup> August 2017. Click the project description for more information on each project.

## Project Values by Feedstock Type (August 2017)



Source: AcuComm database, 31<sup>st</sup> August 2017

## Leading Countries by Value (August 2017)



Source: AcuComm database, 31<sup>st</sup> August 2017



All AD/Biogas Projects Reported by Feedstock Type (September 2016 – August 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	28	460	16	7,062,278	252,224	788	68	2
Food	19	351	18	837,453	44,076	138	40	2
MSW	2	59	30	106,619	53,309	167	0	0
Organic (general/unspecified)	29	487	17	2,125,238	73,284	229	71	2
Plant biomass (non-waste)	2	27	13	115,000	57,500	180	7	4
Plant biomass (waste)	20	216	11	787,522	39,376	123	66	3
Sewage/wastewater	35	2,208	63	4,313,020	123,229	385	131	4
Wood	2	63	32	105,000	52,500	164	11	5
<b>Total</b>	<b>137</b>	<b>3,871</b>	<b>28</b>	<b>15,452,129</b>	<b>112,789</b>	<b>352</b>	<b>393</b>	<b>3</b>

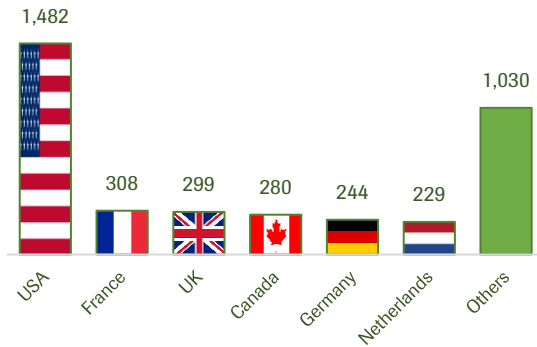
Source: AcuComm database, 31<sup>st</sup> August 2017. See [www.acucomm.net](http://www.acucomm.net) for more details

This brings the total for the twelve month period (ended August 2017) to 137 projects, worth US\$3,871 million or US\$28 million each.

Total feedstock capacity for these projects is 15.5 million tonnes, equal to 112,789 tonnes on average and 352 tonnes per day per project.

Total power generation is 393 MW, equal to 3 MW per project.

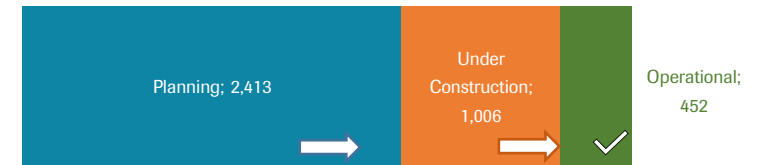
Leading Countries for AD/Biogas Investment (US\$m)



Source: AcuComm database, 31<sup>st</sup> July 2017. Opportunities exist across the world. In the last twelve months, the USA has accounted for US\$1,482 million or 38% of the total. The European market is even larger, accounting for US\$1,655 million or 43%. Leading European markets are Germany, the UK, the Netherlands and France.

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

This graph displays the current operational status of all AD/Biogas projects reported on in the last twelve months. Investments worth US\$452 million (12%) are operational, while US\$1,006 million (26%) are under construction. The largest proportion are in various stages of planning, at US\$2,413 million or 62% of the total. The market is therefore dynamic, with new investment opportunities occurring all the time.



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.