



AD/Biogas New Investment Update

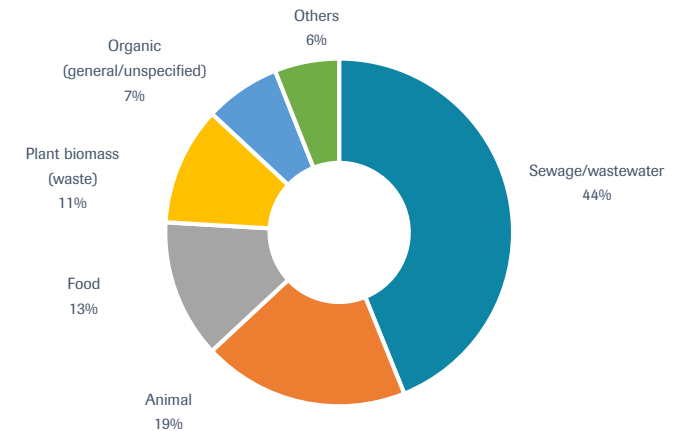
AcuComm reported on 13 new anaerobic digestion/biogas or landfill gas projects in April 2018.

These have a combined value of US\$274 million. Estimated annual feedstock tonnage is 1,070,858 tonnes, and power output is 38 MW, equal to an average of 257 tonnes per day and 3 MW per project.

Sewage/wastewater was the leading feedstock type for projects reported this month, accounting for US\$120 million, equal to 44% of the total.

Ireland was the leading country in April 2018, accounting for one project with a total value of US\$77 million.

Project Values by Feedstock Type (April 2018)



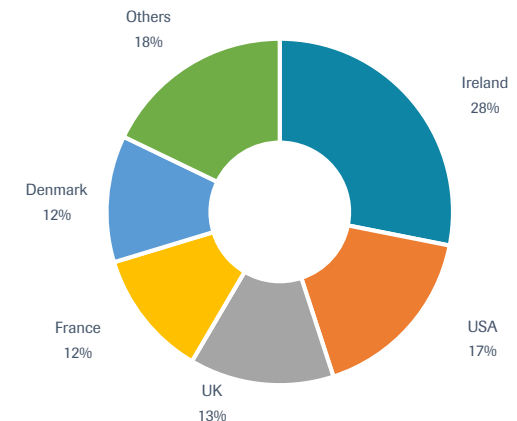
Source: AcuComm database, 30th April 2018

New AD/Biogas Projects Reported in April 2018

Project Description	Principal Waste Type	Location
Construction of a 1 MW anaerobic digestion plant.	Sewage/wastewater	Roscommon, Ireland
Development of an AD plant.	Food	Derby, Derbyshire, UK
Construction of an organic waste Kompogas plant.	Food	Jönköping, Sweden
Construction of an AD plant.	Animal	Alphen, Brabant, Netherlands
Development of a biogas plant and associated facilities.	Plant biomass (waste)	Beerse & Merksplas, Belgium
Development of a biogas facility at wastewater plant.	Sewage/wastewater	Dodge City, KS, USA
Construction of a dry digestion biogas plant.	Plant biomass (waste)	Central China, China
Development of anaerobic digestion/biogas plants at dairy farms.	Animal	Various, Kern County, CA, USA
Construction of an AD plant.	Sewage/wastewater	Sausheim, Haut-Rhin, France
Construction of a biogas plant processing 450,000 tpa of organic waste.	Animal	Kvanløse, Holbæk, Denmark
Construction of a biogas purification plant.	Organic (general/unspecified)	Northwick, Birmingham, UK
Construction of a biogas purification plant.	Plant biomass (non-waste)	Cestas, Bordeaux, France
Development of a biogas plant using rye as feedstock.	Plant biomass (non-waste)	Cestas, Bordeaux, France

Source: AcuComm database, 30th April 2018. Click the project description for more information on each project.

Leading Countries by Value (April 2018)



Source: AcuComm database, 30th April 2018



All AD/Biogas/Landfill Gas Projects Reported by Feedstock Type (April 2017 to March 2018)

	Projects	Value (US\$m)	Average Value (US\$m)	Capacity (tonnes)	Average Capacity (tonnes)	TPD	Power (MW)	Average Power (MW)
Animal	35	592	17	4,657,400	133,069	416	92	3
Food	22	325	15	1,020,024	46,365	145	44	2
MSW	5	165	33	427,427	85,485	267	6	1
Organic (general/unspecified)	30	554	18	1,763,106	58,770	184	102	3
Plant biomass (waste)	21	290	14	1,342,655	63,936	200	73	3
Plant biomass (non-waste)	5	53	11	287,500	57,500	180	14	3
Sewage/wastewater	37	2,752	74	1,333,917	36,052	113	129	3
Wood	-	-	-	-	-	-	-	-
Landfill Gas	11	256	23	n/a	n/a	n/a	58	5
Total	166	4,987	30	10,832,029	65,253	204	517	3

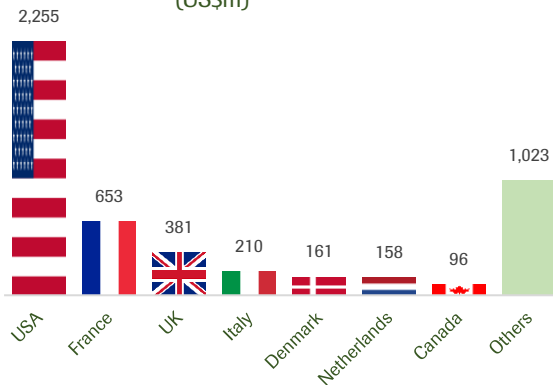
Source: AcuComm database, 30th April 2018. See www.acucomm.net for more details

This brings the total for the twelve month period (ended April 2018) to 166 projects, worth US\$4,987 million or US\$30 million each on average.

Total feedstock capacity for these projects is 10,832 million tonnes, equal to 65,253 tonnes on average and 204 tonnes per day per project.

Total power generation is 517 MW, equal to 3 MW per project.

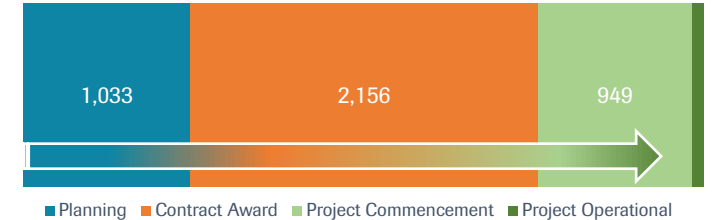
Leading Countries for AD/Biogas Investment (US\$m)



Source: AcuComm database, 30th April 2018. Opportunities exist across the world. In the last twelve months, the USA has accounted for US\$2,255 million or 46% of the total. The European market accounts for US\$2,085 million or 41%. Leading European markets are Denmark, France, Germany, France, the Netherlands and the UK.

Investments worth US\$873 million (17%) are operational, while US\$949 million (19%) are under construction. The largest proportion are in various stages of planning/contract award, at US\$3,189 million or 64% of the total.

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.