



AD/Biogas New Investment Update

AcuComm reported on four new anaerobic digestion/biogas or landfill gas projects in June 2018.

These have a combined value of US\$39 million. Estimated annual feedstock tonnage is 255,000 tonnes, and power output is 23 MW, equal to an average of 199 tonnes per day and 6 MW per project.

Organic (general/unspecified) was the leading feedstock type for projects reported this month, accounting for US\$19 million, equal to 48% of the total.

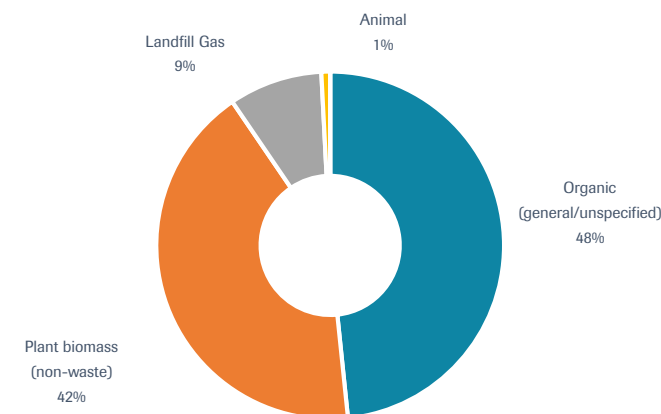
China was the leading country in June 2018, accounting for one project with a total value of US\$19 million.

New AD/Biogas Projects Reported in June 2018

Project Description	Principal Waste Type	Location
Development of a landfill gas facility.	Gas	Kozani, Western Macedonia, Greece
Construction of a €14 million biogas plant.	Plant biomass (non-waste)	Börde, Germany
Construction of an AD plant.	Organic (general/unspecified)	Nanjing, Jiangsu Province, China
Development of a biogas and biofertiliser plant.	Animal	Katunayake, Sri Lanka

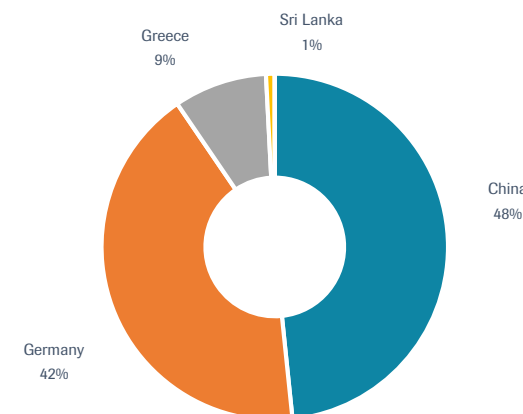
Source: AcuComm database, 30th June 2018. Click the project description for more information on each project.

Project Values by Feedstock Type (June 2018)



Source: AcuComm database, 30th June 2018

Leading Countries by Value (June 2018)



Source: AcuComm database, 30th June 2018



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This brings the total for the twelve month period (ended June 2018) to 158 projects, worth US\$4,584 million or US\$29 million each on average.

Total feedstock capacity for these projects is 10,069 million tonnes, equal to 63,729 tonnes on average and 199 tonnes per day per project.

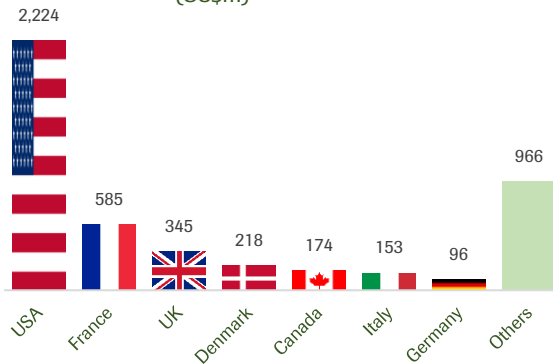
Total power generation is 547 MW, equal to 3 MW per project.

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

	Projects	Value (US\$m)	Average Value (US\$m)	Capacity (tonnes)	Average Capacity (tonnes)	TPD	Power (MW)	Average Power (MW)
Animal	35	575	16	4,474,331	127,838	399	115	3
Food	20	233	12	787,727	39,386	123	34	2
MSW	4	147	37	370,360	92,590	289	9	2
Organic (general/unspecified)	32	529	17	1,869,907	58,435	183	98	3
Plant biomass (waste)	17	186	11	696,601	40,977	128	56	3
Plant biomass (non-waste)	5	52	10	247,251	49,450	155	14	3
Sewage/wastewater	33	2,631	80	1,622,969	49,181	154	121	4
Wood	-	-	-	-	-	-	-	-
Landfill Gas	12	232	19	n/a	n/a	n/a	100	8
Total	158	4,584	29	10,069,145	63,729	199	547	3

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

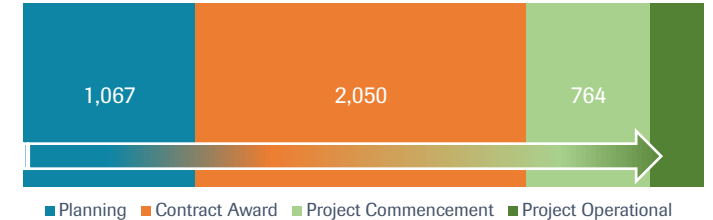
Leading Countries for AD/Biogas Investment (US\$m)



Source: AcuComm database, 30th June 2018. Opportunities exist across the world. In the last twelve months, the USA has accounted for US\$2,224 million or 47% of the total. The European market accounts for US\$1,839 million or 39%. Leading European markets are Denmark, France, Germany, France, the Netherlands and the UK.

Investments worth US\$748 million (16%) are operational, while US\$764 million (17%) are under construction. The largest proportion are in various stages of planning/contract award, at US\$3,117 million or 67% 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.