



# AD/Biogas New Investment Update

AcuComm reported on 16 new anaerobic digestion/biogas or landfill gas projects in November 2018.

These have a combined value of US\$377 million. Estimated annual feedstock tonnage is 1,646,548 tonnes, and power output is 56 MW, equal to an average of 322 tonnes per day and 3 MW per project.

Animal was the leading feedstock type for projects reported this month, accounting for US\$134 million, equal to 35% of the total.

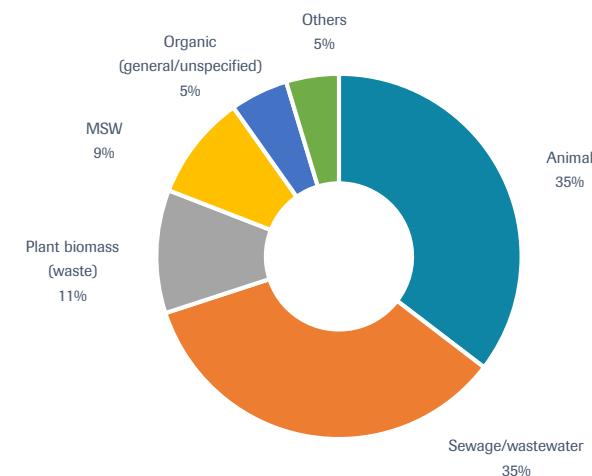
The United Kingdom was the leading country in November 2018, accounting for three projects with a total value of US\$107 million.

## New AD/Biogas Projects Reported in November 2018

Project Description	Principal Waste Type	Location
Construction of an AD plant at a meat processing plant.	Animal	Pérez Millán, Buenos Aires, Argentina
Construction of an AD plant at a steel mill.	Industrial	Ghent, Belgium
Construction of an 8.8 MW AD plant.	Animal	Dumfries and Galloway, Scotland, UK
Construction of an AD plant.	MSW	Melton, East Yorkshire, UK
Construction of a gas-to-grid biogas plant.	Plant biomass (waste)	Willand, Devon, UK
Expansion of an agricultural waste-fed AD plant.	Plant biomass (waste)	Coudun, Oise, France
Opening of a landfill gas-to-energy facility.	Gas	Oklahoma City, OK, USA
Construction of a biogas plant.	Animal	Monroe, NC, USA
Construction of a biogas plant fed with fruit waste.	Plant biomass (waste)	Surallah & Polomolok, Philippines
Construction of a biogas plant.	Organic (general/unspecified)	Veendam, Netherlands
Construction of a 2.0 MW AD plant.	Plant biomass (waste)	St. Antoine de Breuilh, Dordogne, France
Development of a biomethane production facility.	Sewage/wastewater	A Coruña, Spain
Construction of a new sewage treatment plant at WWTP.	Sewage/wastewater	Majadahonda, Madrid, Spain
Upgrading of biogas production at a wastewater plant.	Sewage/wastewater	Melbourne, Victoria, Australia
Construction of an AD plant.	Sewage/wastewater	Shikokuchuo City, Ehime Prefecture, Japan
Construction of a 600,000 tpa AD plant.	Animal	Kvaers, Sønderborg, Denmark

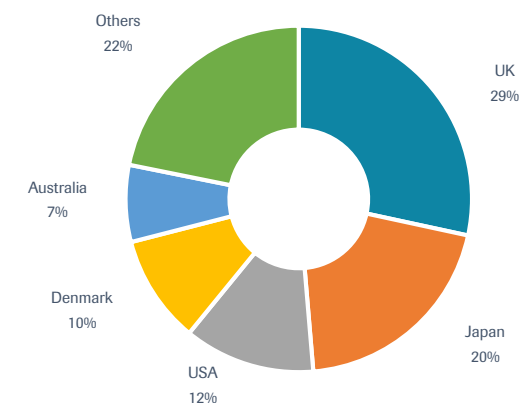
Source: AcuComm database, 30th November 2018. Click the project description for more information on each project.

## Project Values by Feedstock Type (November 2018)



Source: AcuComm database, 30th November 2018

## Leading Countries by Value (November 2018)



Source: AcuComm database, 30th November 2018



## WBA

This brings the total for the twelve month period (ended November 2018) to 156 projects, worth US\$3,514 million or US\$23 million each on average.

Total feedstock capacity for these projects is 10,676 million tonnes, equal to 68,434 tonnes on average and 214 tonnes per day per project.

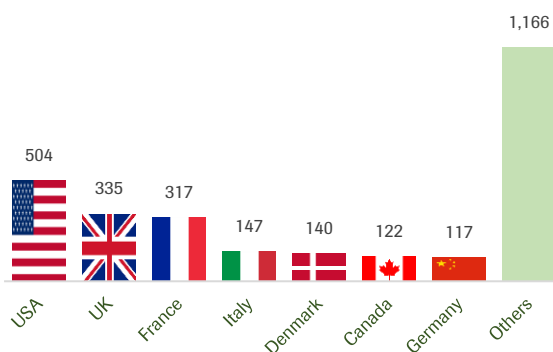
Total power generation is 569 MW, equal to 4 MW per project.

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

	Projects	Value (US\$m)	Average Value (US\$m)	Capacity (tonnes)	Average Capacity (tonnes)	TPD	Power (MW)	Average Power (MW)
Animal	41	767	19	5,829,019	142,171	444	153	4
Food	13	219	17	699,567	53,813	168	29	2
MSW	2	51	25	157,142	78,571	246	3	1
Organic (general/unspecified)	28	543	19	1,657,240	59,187	185	83	3
Plant biomass (waste)	21	290	14	1,057,709	50,367	157	100	5
Plant biomass (non-waste)	4	38	10	189,709	47,427	148	10	2
Sewage/wastewater	36	1,378	38	1,085,391	30,150	94	89	2
Wood	-	-	-	-	-	-	-	-
Landfill Gas	11	228	21	n/a	n/a	n/a	102	9
<b>Total</b>	<b>156</b>	<b>3,514</b>	<b>23</b>	<b>10,675,777</b>	<b>68,434</b>	<b>214</b>	<b>569</b>	<b>4</b>

Source: AcuComm database, 30th November 2018. See [www.acucomm.net](http://www.acucomm.net) for more details

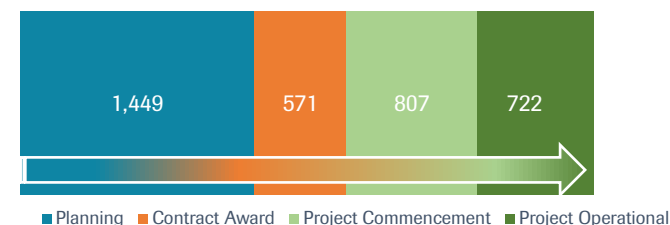
Leading Countries for AD/Biogas Investment (US\$m)



Source: AcuComm database, 30th November 2018. Opportunities exist across the world. In the last twelve months, the USA has accounted for US\$504 million or 18% of the total. The European market accounts for US\$1,497 million or 42%. Leading European markets are Denmark, France, Germany, France, the Netherlands and the UK.

Investments worth US\$722 million (20%) are operational, while US\$807 million (23%) are under construction. The largest proportion are in various stages of planning/contract award, at US\$2,020 million or 57% 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.