



AD/Biogas New Investment Update

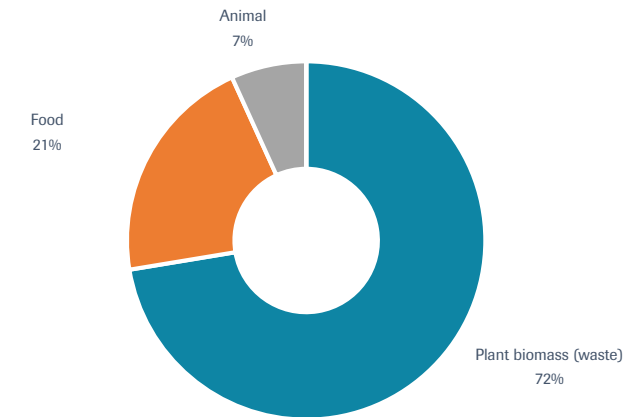
AcuComm reported on four new anaerobic digestion/biogas or landfill gas projects in February 2019.

These have a combined value of US\$23 million. Estimated annual feedstock tonnage is 77,384 tonnes, and power output is 7 MW, equal to an average of 60 tonnes per day and 2 MW per project.

Plant biomass (waste) was the leading feedstock type for projects reported this month, accounting for US\$16 million, equal to 72% of the total.

France was the leading country in January 2019, accounting for two projects with a total value of US\$14 million.

Project Values by Feedstock Type (February 2019)



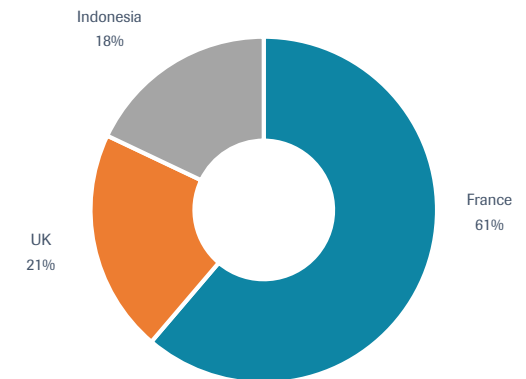
Source: AcuComm database, 28th February 2019

New AD/Biogas Projects Reported in February 2019

Project Description	Principal Waste Type	Location
Construction of a biogas-to-grid plant.	Animal	Guichen, Rennes, France
Construction of a biogas plant.	Plant biomass (waste)	Migné, Indre, France
Construction of a 1.6 MW biogas plant.	Plant biomass (waste)	Tanah Bambu, Indonesia
Construction of an 80,000 tpa AD plant.	Food	Pontefract, West Yorkshire, UK

Source: AcuComm database, 28th February 2019. Click the project description for more information on each project.

Leading Countries by Value (February 2019)



Source: AcuComm database, 28th February 2019



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This brings the total for the twelve month period (ended February 2019) to 146 projects, worth US\$3,206 million or US\$22 million each on average.

Total feedstock capacity for these projects is 10,014 million tonnes, equal to 68,586 tonnes on average and 214 tonnes per day per project.

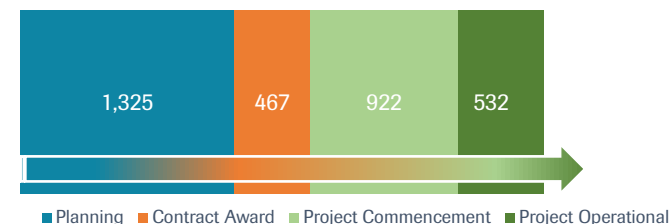
Total power generation is 527 MW, equal to 4 MW per project.

All AD/Biogas/Landfill Gas Projects Reported by Feedstock Type (March 2018 to February 2019)

	Projects	Value (US\$m)	Average Value (US\$m)	Capacity (tonnes)	Average Capacity (tonnes)	TPD	Power (MW)	Average Power (MW)
Animal	39	744	19	5,417,285	138,905	434	147	4
Food	8	194	24	592,238	74,030	231	22	3
MSW	1	35	35	49,800	49,800	156	3	3
Organic (general/unspecified)	32	644	20	1,954,406	61,075	191	101	3
Plant biomass (waste)	19	258	14	914,873	48,151	150	99	5
Plant biomass (non-waste)	4	43	11	205,370	51,343	160	11	3
Sewage/wastewater	31	1,148	37	879,541	28,372	89	80	3
Wood	-	-	-	-	-	-	-	-
Landfill Gas	12	141	12	n/a	n/a	n/a	64	5
Total	146	3,206	22	10,013,513	68,586	214	527	4

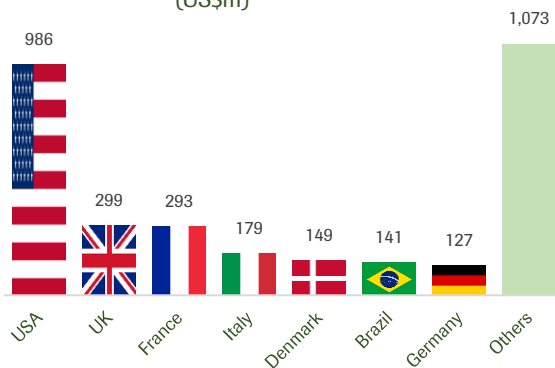
Source: AcuComm database, 28th February 2019. See www.acucomm.net for more details

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



Investments worth US\$532 million (16%) are operational, while US\$922 million (28%) are under construction. The largest proportion are in various stages of planning/contract award, at US\$1,792 million or 55% of the total.

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



Source: AcuComm database, 28th February 2019. Opportunities exist across the world. In the last twelve months, the USA has accounted for US\$986 million or 30% of the total. The European market accounts for US\$1,351 million or 42%. Leading European markets are Denmark, France, Germany, France, the Netherlands and the UK.

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.

