

Waste-derived Biogas: Global Markets for Anaerobic Digestion Equipment

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Abstracts

REPORT SCOPE:

The scope of this report includes the market for biogas to energy for five different feedstock sources: municipal and domestic sewage and sewage sludge, industrial wastewater, food waste and landfill-derived or other municipal derived organics (green waste, yard waste, etc.), landfill gas and agricultural (including animal manures and crop residues as well as dedicated energy crops). The biogas market also is broken down by technology category: passive systems, mesophilic digesters, thermophilic digesters, dry digesters and landfill gas.

A discussion of the market by world region includes overviews of North America, Europe and Asia and individual profiles for countries most active in each region. Present market status, biogas production potential, and policies and incentives that support the industry are given for each country. All market valuations and projections cover the years from 2016 to 2022. Market figures are based on the revenues derived from equipment sales and are projected in 2017 constant dollars (i.e., inflation is not computed into the projection figures). Estimated values used are based on manufacturers' total revenues. Projected and forecasted revenue values are in constant U.S. dollars, unadjusted for inflation.

A technology overview, presentation on the structure of the industry and brief profiles for major participating companies also are included.

For the purposes of the report, biogas equipment will be limited to anaerobic digesters and the gas collection equipment needed in landfill gas recovery projects. The machinery used to transform the gas into electricity—reciprocating and other types of gas

engines, turbine and microturbines, and fuel cells—are not included in the analysis. Similarly, systems for biogas upgrading to renewable natural gas (RNG) also are not included in the study.

REPORT INCLUDES:

58 data tables

An overview of the global market for anaerobic digestion equipment used to transform waste materials into sustainable energy

Analyses of global market trends, with data from 2016 to 2017, and projections of compound annual growth rates (CAGRs) through 2022

Information on the best strategies used by governments responsible for sustainable waste handling and energy supply solutions

An examination of current as well as future trends in the market for industry players and technology developers to understand and strategize their investments

Company profiles of major players in the market, including ADI Systems, BDI-BioEnergy International, CH4 Biogas LLC, Ebara Corp., Kruger USA, Republic Services, Inc. and Turning Earth LLC

SUMMARY

The global market for biogas is undergoing several transitions, both globally and regionally. Many years of incremental advances in biogas production technologies are now coalescing to enable new and renewed growth in global and regional biogas production markets, supporting more favorable project-level economics. While the industry still substantially relies on government incentives and regulations to bolster market development, the economics of biogas production systems are becoming more and more cost-effective and favorable. At the same time, changes in regulatory structures in Europe, select states in the U.S., China and other Asian countries are driving new trends in regional and national markets. Sunsetting tariffs and market-driving structures in Germany, for example, are providing opportunities for nimble companies to pivot focus to other countries where market potential remains strong and

regulatory and incentive structures are still available.

An increasing number of companies headquartered in Europe—which has long led the world in the development of anaerobic digesters and biogas production technology—are continuing to expand overseas partnerships and market development opportunities. Partnerships between European firms and their Asian and North American counterparts are supporting technology exports to these areas, where increasingly favorable markets and regulatory structures promise to support near- to mid-term growth in biogas deployment. Finally, many biogas applications are also in transition. Increasingly stringent requirements for the management of organic wastes, including food waste and organic fractions of municipal solid waste, are beginning to drive anaerobic digestion markets, with concurrent declines in competing technologies. Additionally, ongoing increases in the stringency of municipal wastewater and sludge treatment requirements, both in developed and emerging/transition economies, have the potential to support growth in wastewater and sludge management applications.

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ADI SYSTEMS, INC.
AGRIVERT
AMERESCO, INC.
ANAERGIA INC.
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COMPANIES MENTIONED

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ADI SYSTEMS, INC.
AGRIVERT
AMERESCO, INC.
AQSEPTENCE GROUP GMBH
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ASIABIOGAS CO. LTD. (ABC)
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AXPO KOMPOGAS AG
B9 ORGANIC ENERGY LTD.
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