

Global Biomethane Market: Analysis By Production, By Technology (Anaerobic Digestion, Thermal Gasification, and Others), By Feedstock (Municipal Solid Waste, Agriculture, Energy Crops, and Others), By End-Use (Transport Fuel, Power Generation, and Others), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2029

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Abstracts

The global biomethane market was valued at US\$3.66 billion in 2023. The market value is expected to reach US\$5.63 billion by 2029. Biomethane is a renewable and sustainable form of energy. Derived from organic sources such as agricultural waste, food scraps, and animal manure, biomethane is a purified form of biogas, primarily composed of methane.

The global biomethane market production is expected to reach 18.07 billion cubic meters by 2029. Biomethane is being adopted by cities, corporations, industrial users, and fleet owners to decarbonize hard-to-electrify sectors, move towards a circular economy, and respond to ESG concerns. European and North American energy utilities are investing heavily in biomethane to support decarbonization policies and clean energy supplies. New applications, such as the use of biomethane to produce clean hydrogen, are emerging. Hence, the combination of environmental imperatives, policy support, technological innovation, and market demand is expected to drive significant growth in the biomethane market in the forthcoming years. The market is expected to grow at a CAGR of approx. 8% during the forecasted period of 2024-2029.

Market Segmentation Analysis:

By Technology: The report provides the bifurcation of the market into three segments based on the technology: Anaerobic Digestion, Thermal Gasification, and Others. The anaerobic digestion segment held the highest share of the market, whereas thermal gasification is expected to be the fastest-growing segment in the forecasted period. Anaerobic digestion (AD) has historically dominated the biomethane market due to its maturity, scalability, and compatibility with a wide range of organic feedstocks. As technological advancements continue to improve process efficiency, enhance gas yields, and reduce operational costs, the use of anaerobic digestion for biomethane production is poised for continued growth in the forthcoming years. On the other hand, thermal gasification technology has emerged as a promising approach for converting biomass and organic waste into biomethane and other valuable products such as syngas and biochar. Unlike anaerobic digestion, which relies on microbial decomposition, thermal gasification utilizes high temperatures and controlled oxygen levels to convert organic materials into a synthesis gas composed of hydrogen, carbon monoxide, and methane. While thermal gasification with biomethane synthesis is still in the pre-commercial phase, there is significant potential to scale up this technology in the mid to long term.

By Feedstock: The report further provides the segmentation based on the following feedstock: Municipal Solid Waste, Agriculture, Energy Crops, and Others. Municipal solid waste held the highest share of the market, whereas the agriculture segment is expected to be the fastest-growing segment in the forecasted period. The utilization of municipal solid waste (MSW) as a feedstock for biomethane production has been on the rise as the increasing global population and urbanization have led to a corresponding surge in waste generation, creating a significant abundance of organic materials suitable for biomethane production. Moreover, landfill diversion policies and regulations aimed at reducing methane emissions from waste decomposition have incentivized the adoption of waste-to-energy technologies such as anaerobic digestion for MSW treatment. On the other hand, as sustainable agriculture practices gain momentum, and policies incentivize renewable energy production from agricultural sources, the utilization of agricultural feedstock for biomethane is poised for significant growth in the forthcoming years.

By End-Use: The report provides the glimpse of the biomethane market based on the following end-use: Transport Fuel, Power Generation, and Others. Transport fuel held the highest share of the market and is expected to be the fastest-growing segment in the forecasted period. In the transportation sector, biomethane can be utilized as a direct substitute for compressed natural gas (CNG) or liquefied natural gas (LNG) in vehicles. Its use helps to significantly lower carbon dioxide emissions and other

pollutants compared to conventional gasoline or diesel. In the past few years, the European transportation sector has also seen a strong increase in demand for biomethane supported by the numerous bio-LNG plants in operation and under construction. To continue this momentum and achieve rapid decarbonization policymakers in Europe would need to adopt a neutral-technology approach.

By Region: The report provides insight into the biomethane market value and market production based on the regions: Europe, North America, Asia Pacific, and the Rest of the World. Europe held the major share of the market both in terms of market value and market production. European biomethane production has been further analyzed based on feedstock (Agriculture Residues, Energy Crops, Organic Waste, and Others), end-use (Building, Transport, Power, Industry, and Others), and regions (Germany, France, UK, Denmark, and Rest of Europe). Currently, the EU produces enough biomethane to satisfy approximately 2% of its total natural gas consumption. However, the REPowerEU plan aims to increase this share to 20% by 2030, necessitating a substantial increase in production to over 350 TWh annually. Capacity expansion efforts are already underway, with Europe boasting 1,322 biomethane-producing facilities as of April 2023. Countries like Denmark, Germany, France, the UK, the Netherlands, and Italy are leading the charge in biomethane production, driven by supportive government initiatives and ambitious renewable energy targets.

The expansion of the US biomethane sector is supported by legislative measures such as the Inflation Reduction Act (IRA), which provides fiscal support to biogas for all end-uses and extends credits for alternative fuels in transportation. Additionally, demand for biomethane from non-transportation sectors is expected to drive significant growth, with natural gas utilities and large natural gas users purchasing RNG to decarbonize their supplies and comply with environmental, social, and governance (ESG) commitments. The US's biomethane market production has been further analyzed based on feedstock (Municipal Solid Waste, Agriculture Waste, Food Waste & Waste Water) and end-use (Transport Fuel and Power Generation).

China is the major producer of biomethane in the Asia-Pacific region and has the potential to grow further in the coming years. China has adopted its 14th Five-Year-Plan (FYP) on renewable energy, which includes high targets for renewables, including RNG, given its dual carbon strategic goals. Combined with the rural revitalization strategy and the strong focus of China's policy on energy security, the still undeveloped RNG sector is expected to register an accelerated development during the 14th FYP period (2021-2025). The growth would be facilitated by improvement in policy support, better grid access to the network, and the participation of big players in the sector.

The Indian biomethane market production has also been analyzed based on the following feedstocks (Agricultural Waste, Pressmud, Municipal Solid Waste, Animal Waste, and Others).

Market Dynamics:

Growth Drivers: The global biomethane market has been growing over the past few years, due to factors such as growing greenhouse gas emissions, increasing development of biomethane plants, increasing number of bio-LNG plants, growing electricity generation through renewable energy sources, growing establishment of biomethane refueling station, strengthening power generation infrastructure, government initiatives and key supportive policies, and many other factors. Bio-LNG (liquefied natural gas) plants are specialized facilities that produce LNG from biomethane, enabling its use as a transport fuel and providing a sustainable alternative to conventional diesel and petrol. The development of bio-LNG plants expands the market potential for biomethane by opening up new avenues for its utilization in heavy-duty transportation, marine, and off-grid energy applications. By converting biomethane into LNG, bio-LNG plants enable efficient storage, transportation, and distribution of renewable energy, overcoming logistical challenges associated with biomethane's gaseous form, driving its growth and widespread adoption in the renewable energy landscape.

Challenges: However, the market growth would be negatively impacted by various challenges such as technological complexity, lack of public awareness, financial viability concerns, etc. The capital-intensive nature of biomethane production, coupled with uncertainties surrounding revenue streams and investment returns, significantly influences market dynamics.

Trends: The market is projected to grow at a fast pace during the forecast period, due to various latest trends such as hydrothermal gasification, guarantees of origin (GoO) certificates, enhanced reactor configurations and process optimization, increasing awareness of circular economy, growing international trade and cooperation, integration with renewable energy systems, etc. Guarantees of Origin (GoO) certificates play a crucial role in boosting the biomethane market growth by providing transparency and credibility to biomethane producers and consumers. These certificates certify the origin and sustainability of biomethane production, enhancing market confidence and facilitating trade across borders. As demand for renewable energy sources rises, GoO certificates offer assurance of environmental integrity and compliance with renewable

energy targets, driving investment and market expansion in the biomethane sector.

Impact Analysis of COVID-19 and Way Forward:

While the COVID-19 pandemic initially posed challenges to the global biomethane market, including disruptions in production and reduced consumption, the market's long-term trajectory remains positive. Looking ahead, as economies rebound and prioritize green recovery strategies, biomethane is well-positioned to emerge as a key player in the transition towards a more sustainable and resilient energy landscape. The market is poised to capitalize on the momentum generated by the pandemic's emphasis on sustainability and resilience, with demand expected to rise across sectors such as transportation, power generation, and industrial applications.

Competitive Landscape:

The global biomethane industry is fragmented. The key players in the global biomethane market are:

Veolia Group
EnviTec Biogas AG
ENGIE
E.ON SE (E.ON Bioerdgas GmbH)
Verbio SE
Greenlane Renewables Inc.
Landw?rme GmbH
PlanET Biogas Group
The AB Group
Future Biogas Limited
Bioenergy Devco
Renergon International AG

In the competitive landscape of the biomethane market, players are adopting various strategies to expand their market share and gain a competitive edge. For instance, on April 25, 2024, TotalEnergies and Vanguard Renewables signed an agreement to create an equally owned joint venture to develop, build and operate Farm Powered® renewable natural gas (RNG) projects in the US. TotalEnergies and Vanguard Renewables would advance 10 RNG projects into construction over the next 12 months, with a total annual RNG capacity of 0.8 TWh (2.5 Bcf). On the other hand, on April 25, 2024, Brimex Energy, a joint venture between Mexico-based Grupo Serrano and

England-based Farmerger, obtained the first permit in Mexico for the production of biomethane. The permit authorizes the production and storage of biomethane.

Contents

1. EXECUTIVE SUMMARY

2. INTRODUCTION

2.1 Biomethane: An Overview

2.1.1 Introduction to Biomethane

2.1.2 Advantages and Disadvantages of Biomethane

2.2 Biomethane Segmentation: An Overview

3. GLOBAL MARKET ANALYSIS

3.1 Global Biomethane Market: An Analysis

3.1.1 Global Biomethane Market: An Overview

3.1.2 Global Biomethane Market by Value

3.1.3 Global Biomethane Market by Technology (Anaerobic Digestion, Thermal Gasification, and Others)

3.1.4 Global Biomethane Market by Feedstock (Municipal Solid Waste, Agriculture, Energy Crops, and Others)

3.1.5 Global Biomethane Market by End-Use (Transportation Fuel, Power Generation, and Others)

3.1.6 Global Biomethane Market by Region (Europe, North America, Asia Pacific, and Rest of the World)

3.2 Global Biomethane Market: Production Analysis

3.2.1 Global Biomethane Market Production: An Overview

3.2.2 Global Biomethane Market by Production

3.2.3 Global Biomethane Market Production by Region (Europe, North America, Asia Pacific, and Rest of the World)

3.3 Global Biomethane Market: Technology Analysis

3.3.1 Global Biomethane Market by Technology: An Overview

3.3.2 Global Anaerobic Digestion Biomethane Market by Value

3.3.3 Global Thermal Gasification Biomethane Market by Value

3.3.4 Global Other Biomethane Market by Value

3.4 Global Biomethane Market: Feedstock Analysis

3.4.1 Global Biomethane Market by Feedstock: An Overview

3.4.2 Global Municipal Solid Waste Biomethane Market by Value

3.4.3 Global Agriculture Biomethane Market by Value

3.4.4 Global Energy Crops Biomethane Market by Value

- 3.4.5 Global Others Biomethane Market by Value
- 3.5 Global Biomethane Market: End-Use Analysis
 - 3.5.1 Global Biomethane Market by End-Use: An Overview
 - 3.5.2 Global Transport Fuel Biomethane Market by Value
 - 3.5.3 Global Power Generation Biomethane Market by Value
 - 3.5.4 Global Others Biomethane Market by Value

4. REGIONAL MARKET ANALYSIS

- 4.1 Europe Biomethane Market: An Analysis
 - 4.1.1 Europe Biomethane Market: An Overview
 - 4.1.2 Europe Biomethane Market by Value
 - 4.1.3 Europe Biomethane Market by Production
 - 4.1.4 Europe Biomethane Market Production by Feedstock (Agriculture Residues, Energy Crops, Organic Waste, and Others)
 - 4.1.5 Europe Biomethane Market Production by End-Use (Building, Transport, Power, Industry, and Others)
 - 4.1.6 Europe Biomethane Market Production by Region (Germany, France, UK, Denmark, and Rest of the Europe)
 - 4.1.7 Germany Biomethane Market by Production
 - 4.1.8 Germany Biomethane Market Production by End-Use (Industry, Power, Building, Transport, and Others)
 - 4.1.9 France Biomethane Market by Production
 - 4.1.10 France Biomethane Market Production by Feedstock (Agriculture Waste, and Others)
 - 4.1.11 France Biomethane Market Production by End-Use (Building, Industry, Transport, and Others)
 - 4.1.12 The UK Biomethane Market by Production
 - 4.1.13 The UK Biomethane Market Production by End-Use (Building, Power, Industry, and Transport)
 - 4.1.14 Denmark Biomethane Market by Production
 - 4.1.15 Rest of Europe Biomethane Market by Production
- 4.2 North America Biomethane Market: An Analysis
 - 4.2.1 North America Biomethane Market: An Overview
 - 4.2.2 North America Biomethane Market by Value
 - 4.2.3 North America Biomethane Market by Production
 - 4.2.4 North America Biomethane Market Production by Region (The US and Rest of North America)
 - 4.2.5 The US Biomethane Market by Production

4.2.6 The US Biomethane Market Production by Feedstock (Municipal Solid Waste, Agriculture Waste, and Food Waste & Waste Water)

4.2.7 The US Biomethane Market Production by End-Use (Transport Fuel and Power Generation)

4.2.8 Rest of North America Biomethane Market by Production

4.3 Asia Pacific Biomethane Market: An Analysis

4.3.1 Asia Pacific Biomethane Market: An Overview

4.3.2 Asia Pacific Biomethane Market by Value

4.3.3 Asia Pacific Biomethane Market by Production

4.3.4 Asia Pacific Biomethane Market Production by Region (China, India, and Rest of the Asia Pacific)

4.3.5 China Biomethane Market by Production

4.3.6 India Biomethane Market by Production

4.3.7 India Biomethane Market Production by Feedstock (Agricultural Waste, Pressmud, Municipal Solid Waste, Animal Wastes, and Others)

4.3.8 Rest of Asia Pacific Biomethane Market by Production

4.4 Rest of World Biomethane Market: An Analysis

4.4.1 Rest of World Biomethane Market: An Overview

4.4.2 Rest of World Biomethane Market by Value

4.4.3 Rest of World Biomethane Market by Production

5. IMPACT OF COVID-19

5.1 Impact of COVID-19 on Global Biomethane Market

5.2 Post COVID-19 Impact on Global Biomethane Market

6. MARKET DYNAMICS

6.1 Growth Drivers

6.1.1 Growing Greenhouse Gas Emissions

6.1.2 Increasing Development of Biomethane Plants

6.1.3 Rising Number of Bio-LNG Plants

6.1.4 Growing Electricity Generation through Renewable Energy Sources

6.1.5 Growing Establishment of Biomethane Refueling Station

6.1.6 Strengthening Power Generation Infrastructure

6.1.7 Government Initiatives and Key Supportive Policies

6.1.8 Increasing Demand in the Transportation Sector

6.2 Challenges

6.2.1 Technological Complexity

6.2.2 Lack of Public Awareness

6.2.3 Financial Viability Concerns

6.3 Market Trends

6.3.1 Hydrothermal Gasification

6.3.2 Advancements in PSA technology

6.3.3 Guarantees of Origin (GoO) Certificates

6.3.4 Enhanced Reactor Configurations and Process Optimization

6.3.5 Increasing Awareness of Circular Economy

6.3.6 Growing International Trade and Cooperation

6.3.7 Integration with Renewable Energy Systems

7. COMPETITIVE LANDSCAPE

7.1 Global Biomethane Market: Competitive Landscape

8. COMPANY PROFILES

8.1 Veolia Group

8.1.1 Business Overview

8.1.2 Revenue by Business Line

8.1.3 Business Strategy

8.2 EnviTec Biogas AG

8.2.1 Business Overview

8.2.2 Operating Segments

8.2.3 Business Strategy

8.3 ENGIE

8.3.1 Business Overview

8.3.2 Operating Segments

8.3.3 Business Strategy

8.4 E.ON SE (E.ON Bioerdgas GmbH)

8.4.1 Business Overview

8.4.2 Operating Segments

8.4.3 Business Strategy

8.5 Verbio SE

8.5.1 Business Overview

8.5.2 Operating Segments

8.5.3 Business Strategy

8.6 Greenlane Renewables Inc.

8.6.1 Business Overview

- 8.6.2 Operating Regions
- 8.6.3 Business Strategy
- 8.7 Landw?rme GmbH
 - 8.7.1 Business Overview
 - 8.7.2 Business Strategy
- 8.8 PlanET Biogas Group
 - 8.8.1 Business Overview
 - 8.8.2 Business Strategy
- 8.9 The AB Group
 - 8.9.1 Business Overview
 - 8.9.2 Business Strategy
- 8.10 Future Biogas Limited
 - 8.10.1 Business Overview
 - 8.10.2 Business Strategy
- 8.11 Bioenergy Devco
 - 8.11.1 Business Overview
 - 8.11.2 Business Strategy
- 8.12 Renergon International AG
 - 8.12.1 Business Overview

List Of Figures

LIST OF FIGURES

Figure 1: Advantages and Disadvantages of Biomethane

Figure 2: Biomethane Segmentation

Figure 3: Global Biomethane Market by Value; 2019-2023 (US\$ Billion)

Figure 4: Global Biomethane Market by Value; 2024-2029 (US\$ Billion)

Figure 5: Global Biomethane Market by Technology; 2023 (Percentage, %)

Figure 6: Global Biomethane Market by Feedstock; 2023 (Percentage, %)

Figure 7: Global Biomethane Market by End-Use; 2023 (Percentage, %)

Figure 8: Global Biomethane Market by Region; 2023 (Percentage, %)

Figure 9: Global Biomethane Market by Production; 2019-2023 (Billion Cubic Meters)

Figure 10: Global Biomethane Market by Production; 2024-2029 (Billion Cubic Meters)

Figure 11: Global Biomethane Market Production by Region; 2023 (Percentage, %)

Figure 12: Global Anaerobic Digestion Biomethane Market by Value; 2019-2023 (US\$ Billion)

Figure 13: Global Anaerobic Digestion Biomethane Market by Value; 2024-2029 (US\$ Billion)

Figure 14: Global Thermal Gasification Biomethane Market by Value; 2019-2023 (US\$ Million)

Figure 15: Global Thermal Gasification Biomethane Market by Value; 2024-2029 (US\$ Million)

Figure 16: Global Other Biomethane Market by Value; 2019-2023 (US\$ Million)

Figure 17: Global Other Biomethane Market by Value; 2024-2029 (US\$ Million)

Figure 18: Global Municipal Solid Waste Biomethane Market by Value; 2019-2023 (US\$ Billion)

Figure 19: Global Municipal Solid Waste Biomethane Market by Value; 2024-2029 (US\$ Billion)

Figure 20: Global Agriculture Biomethane Market by Value; 2019-2023 (US\$ Million)

Figure 21: Global Agriculture Biomethane Market by Value; 2024-2029 (US\$ Billion)

Figure 22: Global Energy Crops Biomethane Market by Value; 2019-2023 (US\$ Million)

Figure 23: Global Energy Crops Biomethane Market by Value; 2024-2029 (US\$ Million)

Figure 24: Global Others Biomethane Market by Value; 2019-2023 (US\$ Million)

Figure 25: Global Others Biomethane Market by Value; 2024-2029 (US\$ Billion)

Figure 26: Global Transport Fuel Biomethane Market by Value; 2019-2023 (US\$ Billion)

Figure 27: Global Transport Fuel Biomethane Market by Value; 2024-2029 (US\$ Billion)

Figure 28: Global Power Generation Biomethane Market by Value; 2019-2023 (US\$ Million)

Figure 29: Global Power Generation Biomethane Market by Value; 2024-2029 (US\$ Million)

Figure 30: Global Others Biomethane Market by Value; 2019-2023 (US\$ Billion)

Figure 31: Global Others Biomethane Market by Value; 2024-2029 (US\$ Billion)

Figure 32: Europe Biomethane Market by Value; 2019-2023 (US\$ Billion)

Figure 33: Europe Biomethane Market by Value; 2024-2029 (US\$ Billion)

Figure 34: Europe Biomethane Market by Production; 2019-2023 (Billion Cubic Meters)

Figure 35: Europe Biomethane Market by Production; 2024-2029 (Billion Cubic Meters)

Figure 36: Europe Biomethane Market Production by Feedstock; 2023 (Percentage, %)

Figure 37: Europe Biomethane Market Production by End-Use; 2023 (Percentage, %)

Figure 38: Europe Biomethane Market Production by Region; 2023 (Percentage, %)

Figure 39: Germany Biomethane Market by Production; 2019-2023 (Billion Cubic Meters)

Figure 40: Germany Biomethane Market by Production; 2024-2029 (Billion Cubic Meters)

Figure 41: Germany Biomethane Market Production by End-Use; 2023 (Percentage, %)

Figure 42: France Biomethane Market by Production; 2019-2023 (Million Cubic Meters)

Figure 43: France Biomethane Market by Production; 2024-2029 (Billion Cubic Meters)

Figure 44: France Biomethane Market Production by Feedstock; 2023 (Percentage, %)

Figure 45: France Biomethane Market Production by End-Use; 2023 (Percentage, %)

Figure 46: The UK Biomethane Market by Production; 2019-2023 (Million Cubic Meters)

Figure 47: The UK Biomethane Market by Production; 2024-2029 (Billion Cubic Meters)

Figure 48: The UK Biomethane Market Production by End-Use; 2023 (Percentage, %)

Figure 49: Denmark Biomethane Market by Production; 2019-2023 (Million Cubic Meters)

Figure 50: Denmark Biomethane Market by Production; 2024-2029 (Billion Cubic Meters)

Figure 51: Rest of Europe Biomethane Market by Production; 2019-2023 (Million Cubic Meters)

Figure 52: Rest of Europe Biomethane Market by Production; 2024-2029 (Million Cubic Meters)

Figure 53: North America Biomethane Market by Value; 2019-2023 (US\$ Million)

Figure 54: North America Biomethane Market by Value; 2024-2029 (US\$ Billion)

Figure 55: North America Biomethane Market by Production; 2019-2023 (Billion Cubic Meters)

Figure 56: North America Biomethane Market by Production; 2024-2029 (Billion Cubic Meters)

Figure 57: North America Biomethane Market Production by Region; 2023 (Percentage, %)

Figure 58: The US Biomethane Market by Production; 2019-2023 (Billion Cubic Meters)

Figure 59: The US Biomethane Market by Production; 2024-2029 (Billion Cubic Meters)

Figure 60: The US Biomethane Market Production by Feedstock; 2023 (Percentage, %)

Figure 61: The US Biomethane Market Production by End-Use; 2023 (Percentage, %)

Figure 62: Rest of North America Biomethane Market by Production; 2019-2023 (Million Cubic Meters)

Figure 63: Rest of North America Biomethane Market by Production; 2024-2029 (Million Cubic Meters)

Figure 64: Asia Pacific Biomethane Market by Value; 2019-2023 (US\$ Million)

Figure 65: Asia Pacific Biomethane Market by Value; 2024-2029 (US\$ Million)

Figure 66: Asia Pacific Biomethane Market by Production; 2019-2023 (Million Cubic Meters)

Figure 67: Asia Pacific Biomethane Market by Production; 2024-2029 (Billion Cubic Meters)

Figure 68: Asia Pacific Biomethane Market Production by Region; 2023 (Percentage, %)

Figure 69: China Biomethane Market by Production; 2019-2023 (Million Cubic Meters)

Figure 70: China Biomethane Market by Production; 2024-2029 (Million Cubic Meters)

Figure 71: India Biomethane Market by Production; 2019-2023 (Million Cubic Meters)

Figure 72: India Biomethane Market by Production; 2024-2029 (Million Cubic Meters)

Figure 73: India Biomethane Market Production by Feedstock; 2023 (Percentage, %)

Figure 74: Rest of Asia Pacific Biomethane Market by Production; 2019-2023 (Million Cubic Meters)

Figure 75: Rest of Asia Pacific Biomethane Market by Production; 2024-2029 (Million Cubic Meters)

Figure 76: Rest of World Biomethane Market by Value; 2019-2023 (US\$ Million)

Figure 77: Rest of World Biomethane Market by Value; 2024-2029 (US\$ Million)

Figure 78: Rest of World Biomethane Market by Production; 2019-2023 (Million Cubic Meters)

Figure 79: Rest of World Biomethane Market by Production; 2024-2029 (Million Cubic Meters)

Figure 80: Global Carbon dioxide (CO₂) Emissions Per Capita; 1900-2022 (Tonnes)

Figure 81: European Development of Biomethane Plants; 2018-2022 (Number of Plants)

Figure 82: European Number of Bio-LNG Plants with their Production Capacity; 2018-2025 (Number of Plants, TWh/year)

Figure 83: Global Electricity Supply and Share of Renewable Source; 2020-2025 (TWh, Percentage, %)

Figure 84: Veolia Group Revenue by Business Line; 2023 (Percentage, %)

Figure 85: EnviTec Biogas AG Revenue by Segment; 2022 (Percentage, %)

Figure 86: ENGIE Revenues by Segment; 2023 (Percentage, %)

Figure 87: E.ON SE Sales by Segment; 2023 (Percentage, %)

Figure 88: Verbio SE Revenue by Segment; 2022/2023 (Percentage, %)

Figure 89: Greenlane Renewables Inc. Revenue by Region; 2023 (Percentage, %)

Table 1: Key Supportive Policies for Biomethane

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