

US Market Biogas Market & Major Drivers

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Who we are

The only US organization representing the entire biogas industry

All sectors represented

- Project developers/owners
- Equipment retailers and dealers
- Waste management companies
- Waste water companies
- Farms
- Utilities
- Municipalities
- Consultants and EPCs
- Financiers, accountants, lawyers and engineers
- Non-profits, universities and government agencies

240+
organizations
2,700+
individuals



The US Biogas Market



Current

- 263 on Farm
- 1,269 Water
- 66 Food Scrap
- 645 at Landfills

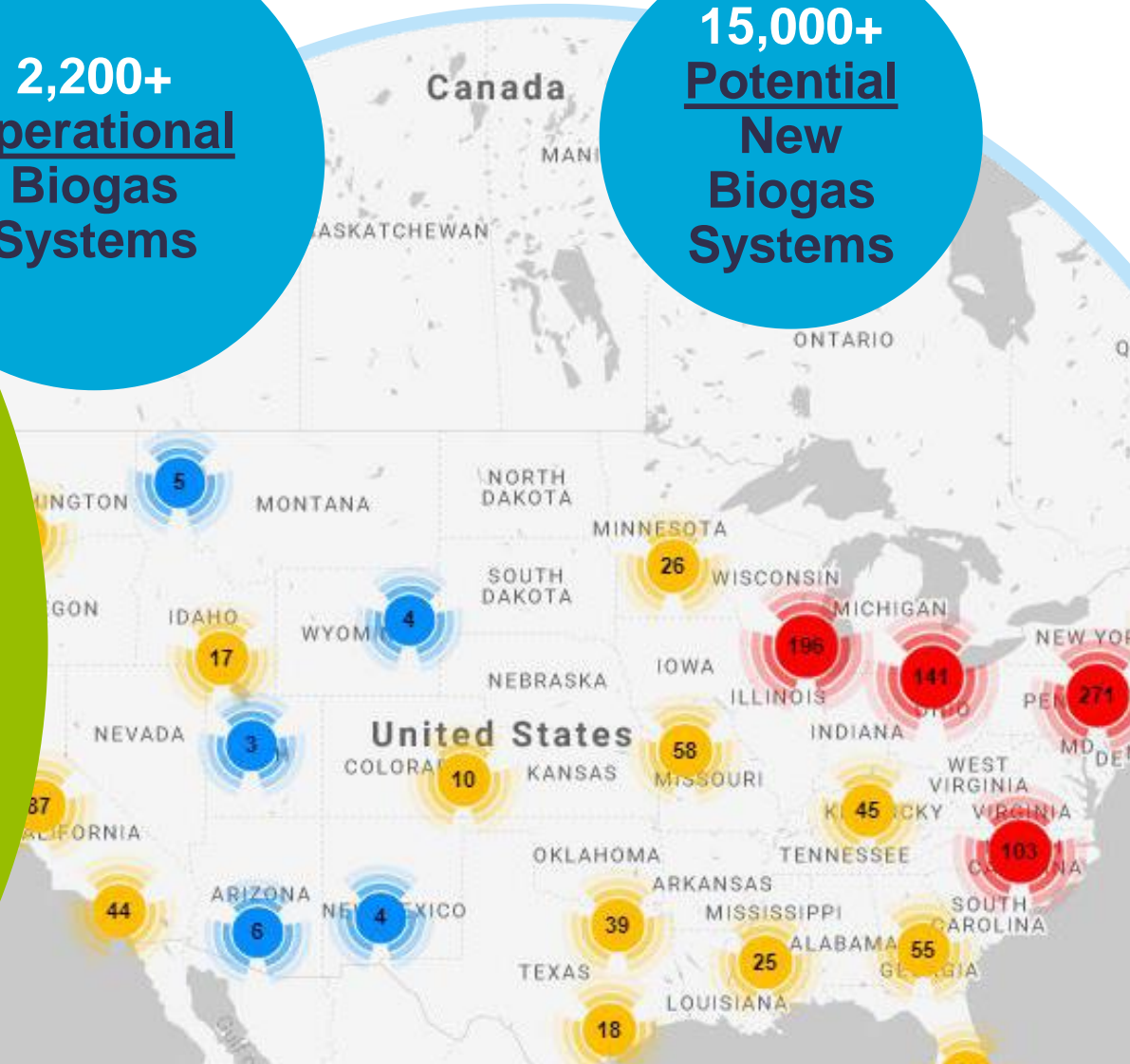
Potential

- 8,300 on Farm
- 4,000 Wastewater
- 1,000 Food Scrap
- 440 at Landfills

Existing and
potential
systems in
ALL 50
STATES

2,200+
Operational
Biogas
Systems

15,000+
Potential
New
Biogas
Systems



RNG Drivers:

1. The Federal Renewable Fuel Standard (RFS)

And

2. The California Low Carbon Fuel Standard (LCFS)

Natural Gas: \$3/MMBTU

Biogas→RNG: \$9-90/MMBTU

Potential Game changer:
eRINs.

Biogas >
BEVs/FCEVs

Other State LCFS Programs?
(OR, WA, NY, NM, IA, MN, IL...)

Voluntary RNG purchases for corporate sustainability (ESG investing)

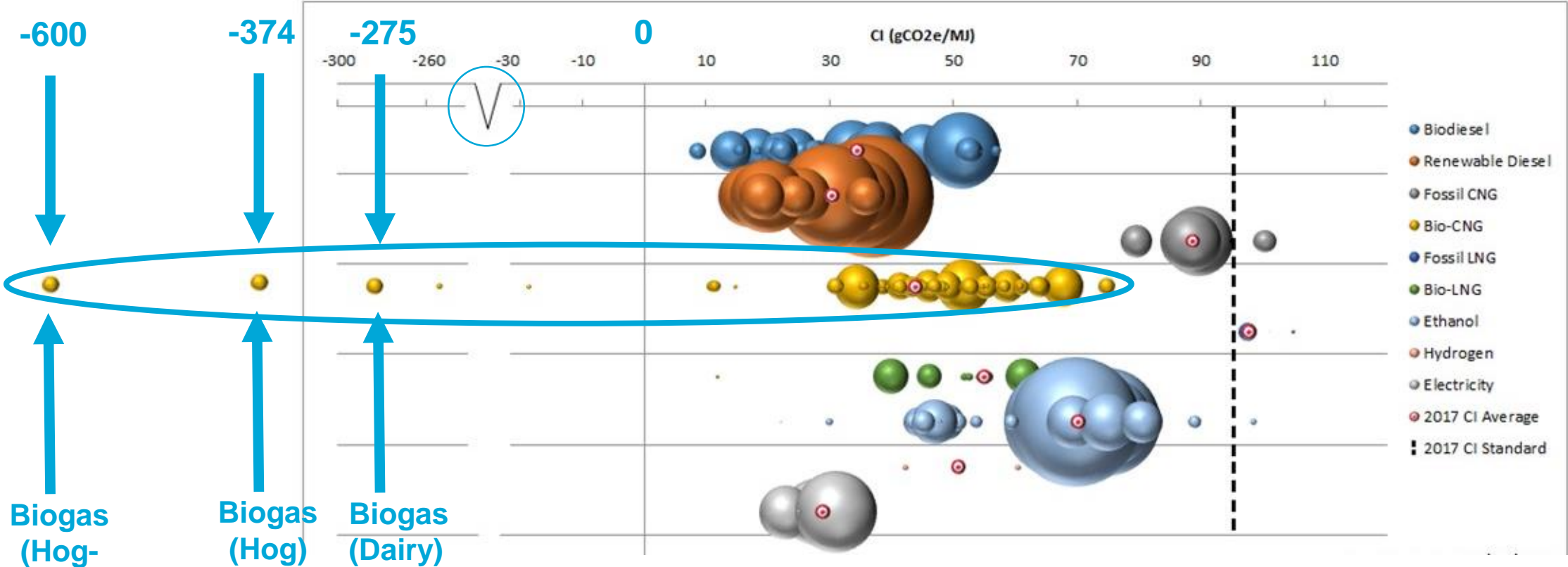
Expanding beyond dairy to swine, poultry

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Putting a Value on Carbon Reduction (California)



For their Low Carbon Fuel Standard, the California Air Resources Board evaluates EVERY PROJECT INDIVIDUALLY on a lifecycle basis, to determine whether the new project will add or remove carbon emissions compared to whatever actual emissions are currently emitted from whatever the project is replacing.

Lesser Drivers (currently)



**Nutrient
Recovery/
Water**

**Food
Waste
Recycling**

**Municipal
Waste-
water**

**Urban
Brown-
fields**