UABIO / FvB Webinar 19 May 2023



German Biogas Association Association Allemande du Biogaz Asociación Alemana de Biogás www.biogas.org

German and European Biogas Markets Status · Uses · Legal Framework · Success Cases



Dirk Bonse

Head of Department "Renewable Gases" · Fachverband Biogas e.V. German Biogas Association



www.euref.de

Agenda

Who we are



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PROTECTION

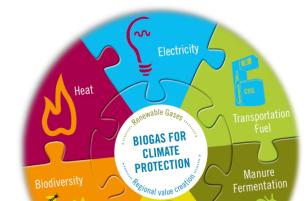
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On current occasion: Biomethane potential EU & Germany Technological options for biomethane production (Overview) EU- and nationwide legal framework Business concepts Biomethane as a fuel Conclusion and outlook \mathbf{v} **Additional Information: Technological options for** Flectricity Heat biomethane production (details) **BIOGAS FOR** CLIMATE



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Who we are



The German Biogas Association: Profile

4,700⁺ members



- Plant operators
- Manufacturers
- Research Institutes
- Public Authorities
- Consultants
- Dedicated Individuals
- ... and you?



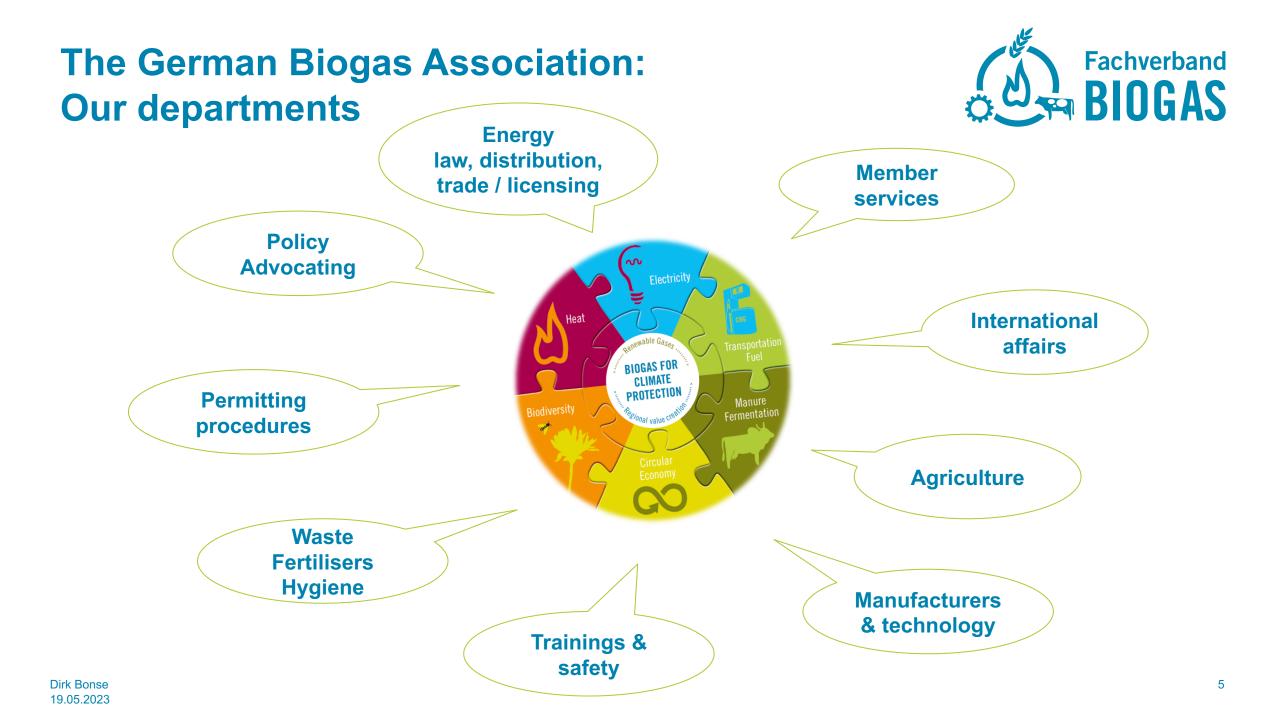
Member of

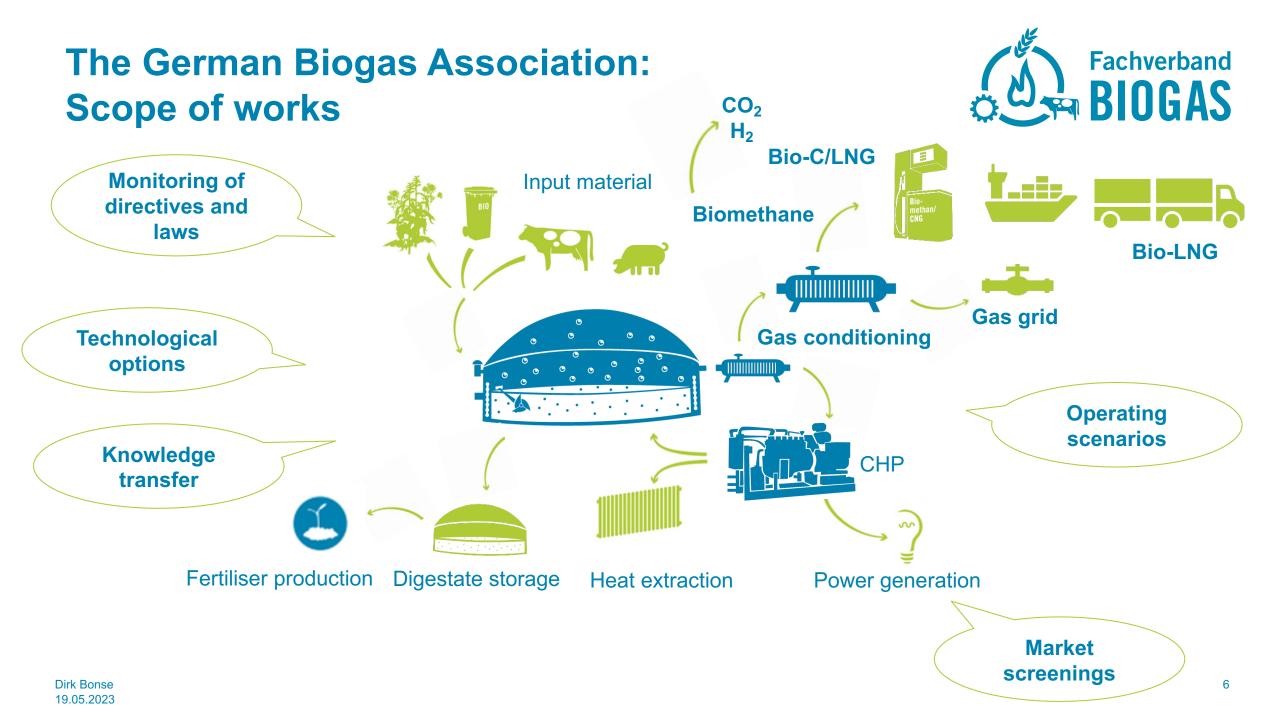


Our Goals:

Establishing biogas as an important component for climate protection

- Definition of legal frameworks and guidelines
- Information exchange, knowledge transfer
- Advocating on EU-, national and regional levels

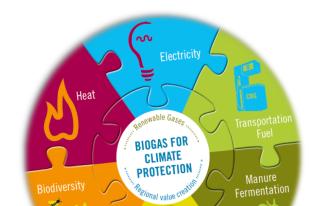


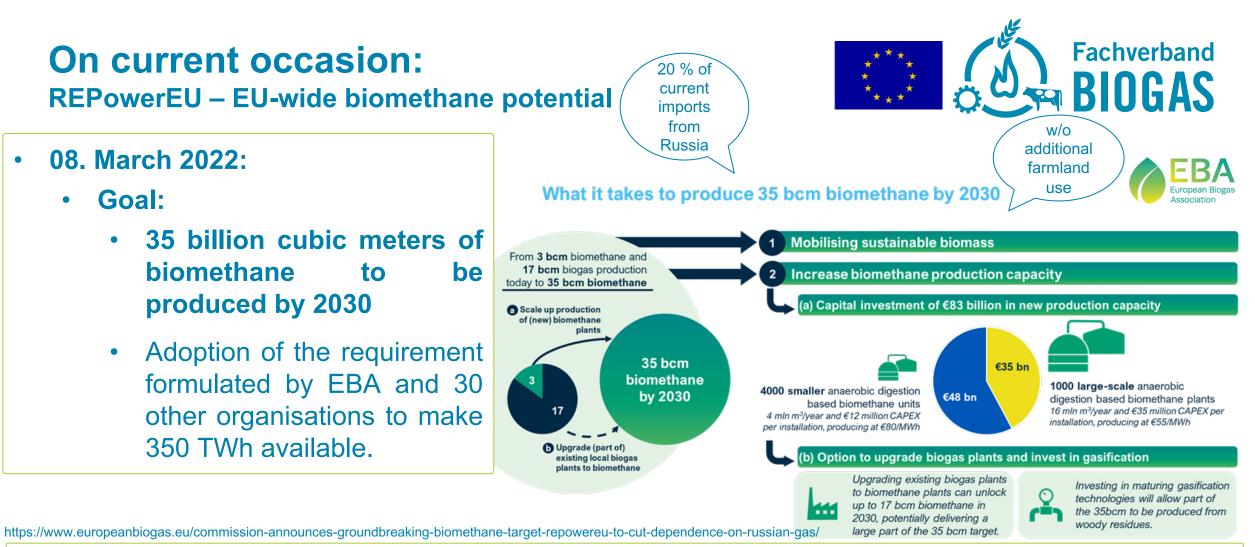




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On current occasion: Biomethane potential EU & Germany





- Abolition of the maximum rated output (capping of production capacity)
- More flexibility in substrate use
- Less bureaucratic hurdles and faster decisions on permits

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On current occasion: REPowerEU – Biomethane Industrial Partnership (BIP)





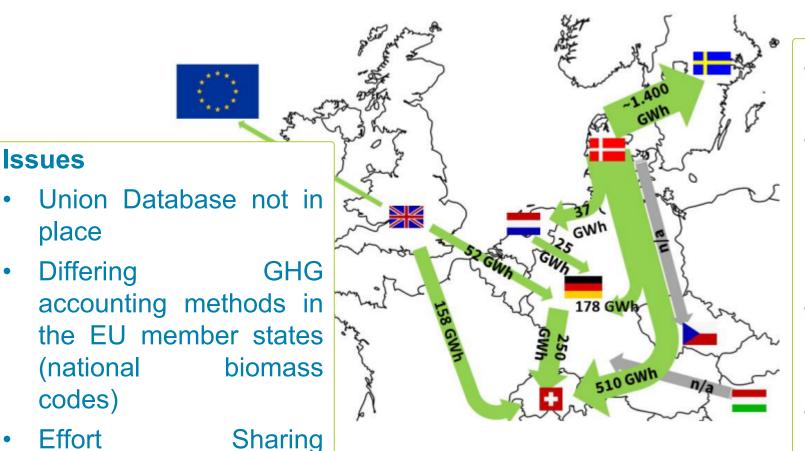


- European Commission and industry leaders launch Biomethane Industrial Partnership to support the 35 bcm target
- Consisting of companies, industry associations, academia, society organisations
- Goals: Identification of barriers, legal frameworks (permitting), best practices, recommendations to EU Commission

https://bip-europe.eu/

Trade volumes 2020

International biomethane transfers 2020 without transfers < 10 GWh



Branchenbarometer Biomethan - dena 2021



- By trade of certificates of origin
- Recognition of biomethane from abroad in the ETS from/to countries with similar certification schemes – or no regulation
- More than half of Danish biomethane certificates marketed abroad
- Export from Denmark into Sweden triggered by CO2 and energy tax exemption

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place

Regulation

and other

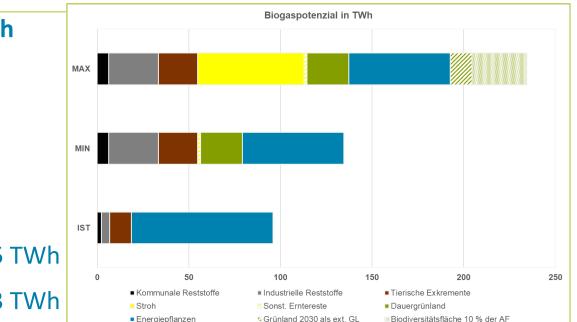
measures not yet in

On current occasion:

German-wide biomethane potential







(iv) extensively used grassland outcrop (up to 1,2 Mio. ha in 2030): 0-22 TWh

(v) Biodiversity areas (up to 1 Mio. ha wild and flowering plants in 2030): 0 - 30 TWh

=> up to 234 TWh (thereof approx. 95 TWh developed)

=> Corresponds to approx. 42% of today's natural gas imports from Russia

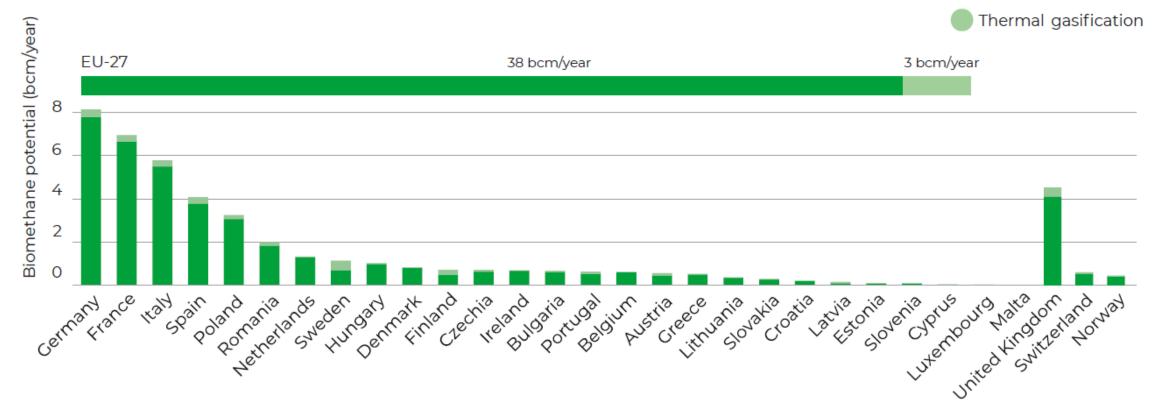
Sources: FvB Abfälle, Reststoffe, Nebenprodukte, Energiepflanzen und Aufwuchs von Dauergrünland nach DVGW (2019), Ermittlung des Gesamtpotenzials erneuerbarer Gase zur Einspeisung ins deutsche Gasnetz.

On current occasion: European wide biomethane potential 2030



Anaerobic digestion

Biomethane potential in 2030 per technology and country

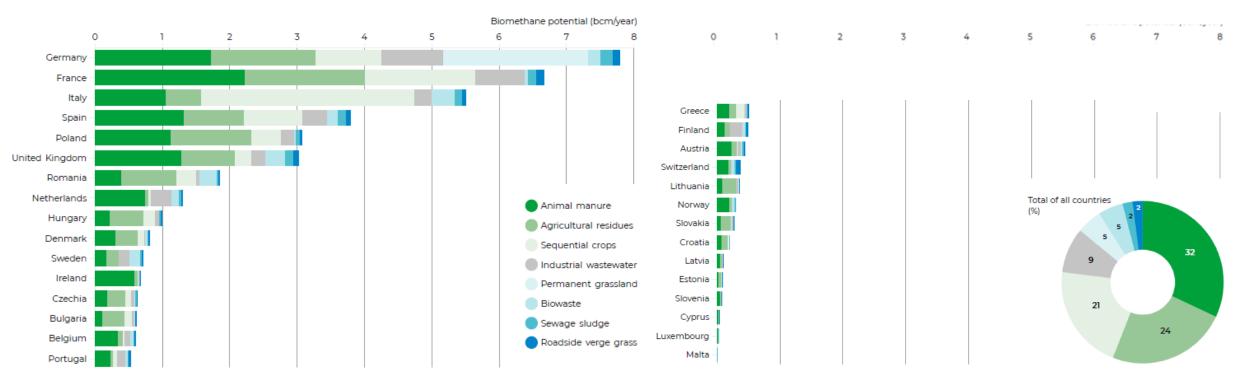


Guidehouse Netherlands B.V (Publisher) [July 2022]: Biomethane production potentials in the EU. A Gas for Climate Report. [p. 3.]

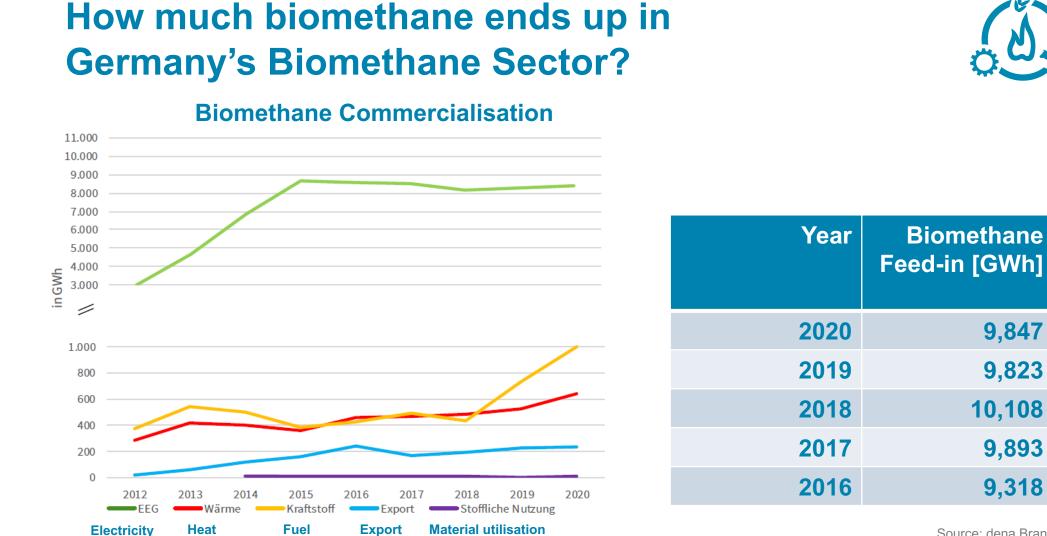
On current occasion: European wide biomethane potential 2030



Anaerobic digestion potential in 2030 per feedstock and country



https://gasforclimate2050.eu/wp-content/uploads/2022/10/Guidehouse GfC report design final v3.pdf 13



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Thereof fuel

utilisation

[GWh]

1,000

700

389

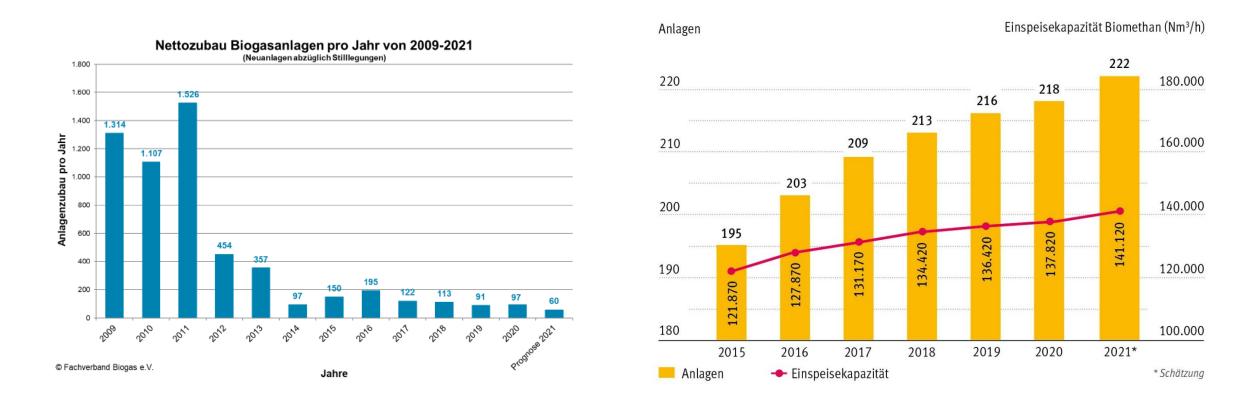
380

379

Source: dena Branchenbarometer Biomethan 2021

How much biomethane ends up in Germany's Biomethane Sector?

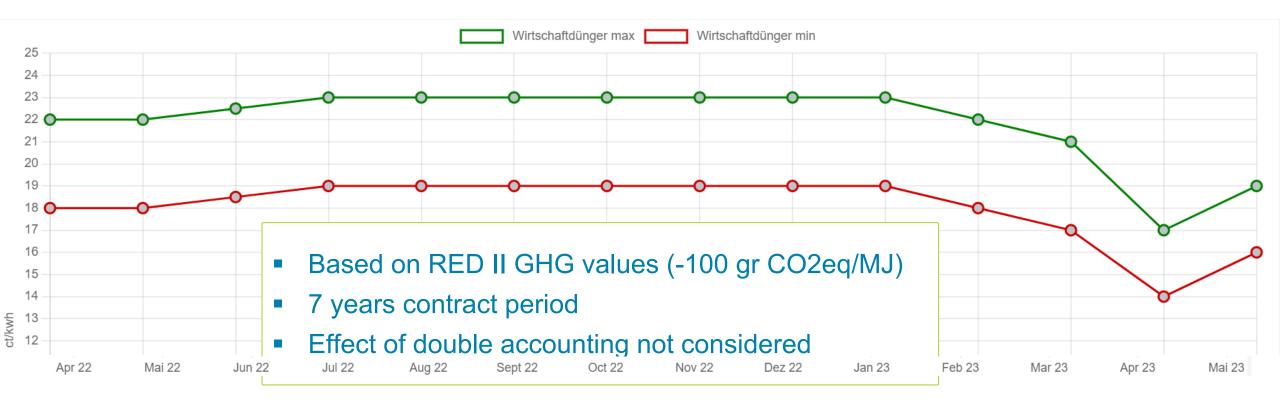




Installation capacity strongly decreasing – yet biomethane production increasing. Older plants are upgrading to other uses than just electricity production from biogas.

Pricing Biomethane in Germany Min/Max Market Prices for Manure

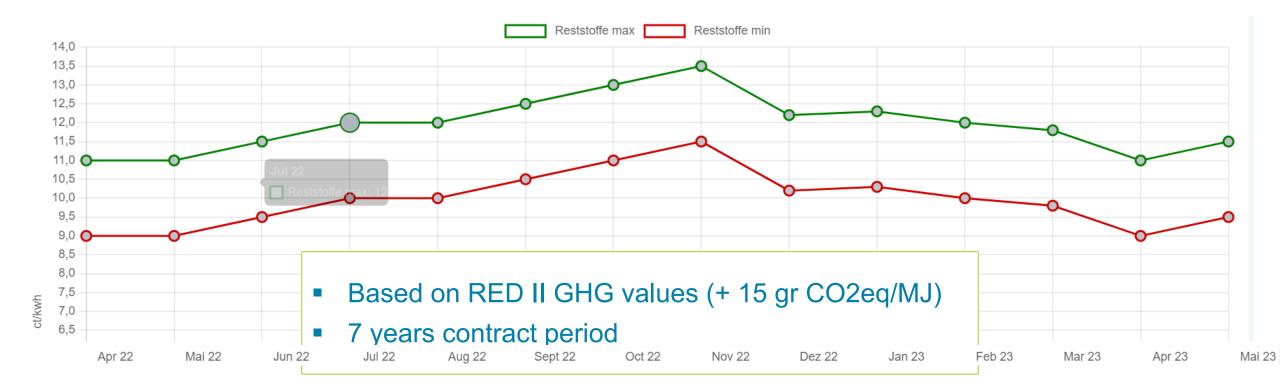




https://agriportance.com/biomethan-preisticker/

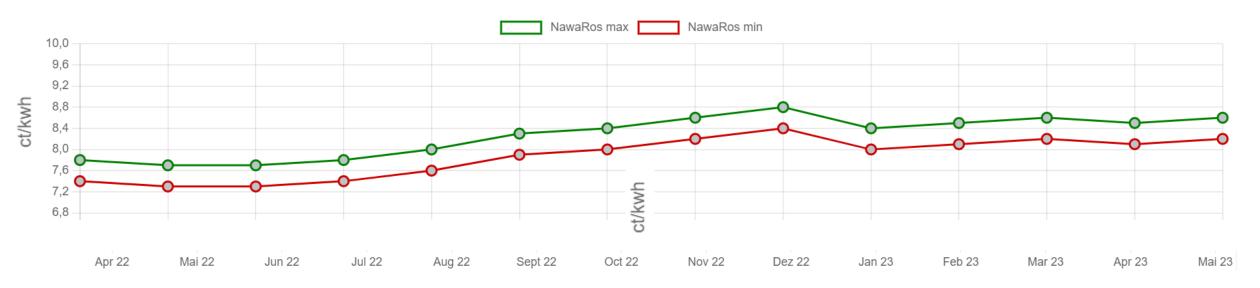
Pricing Biomethane in Germany Min/Max Market Prices for Residues from 2023





https://agriportance.com/biomethan-preisticker/

Pricing Biomethane in Germany Min/Max Market Prices for ren. Raw Materials from 2023



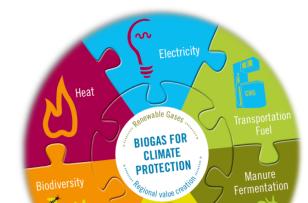
- Based on feed-in tariff predominately biomethane CHPs
- 7 years contract period

https://agriportance.com/biomethan-preisticker/



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Technological options for biomethane production (Overview)



Technological options for biomethane production – from raw biogas to biomethane

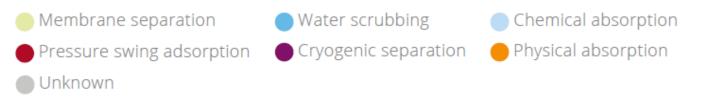


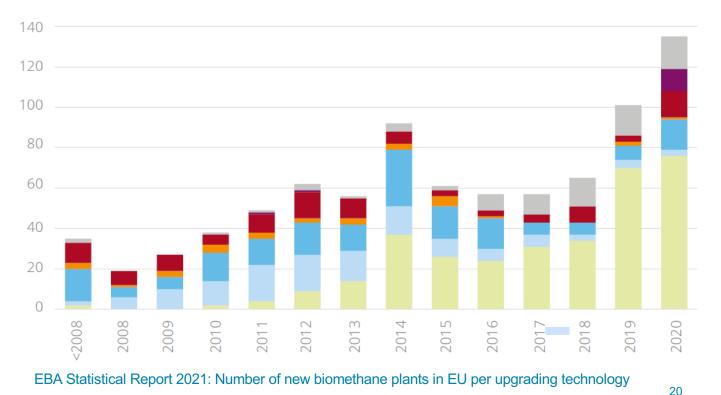
• Why?

- Adaptation of the gas quality to the natural gas network (L- or H-gas)
- Increase methane content of biogas (55 % - 98 %)

• How?

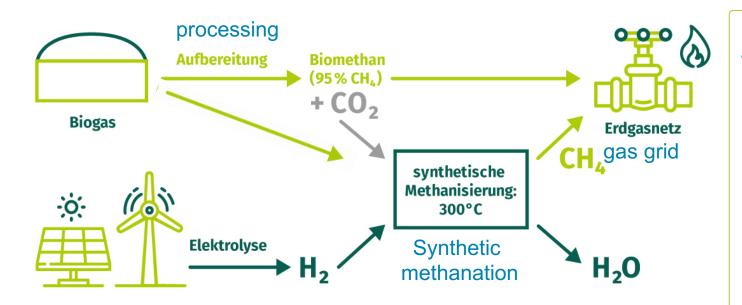
- Drying
- CO₂- removal (and use)
- Coarse and fine desulfurisation
- Odorising





Technological options for biomethane production - direct & biological methanation





Methanation potential:

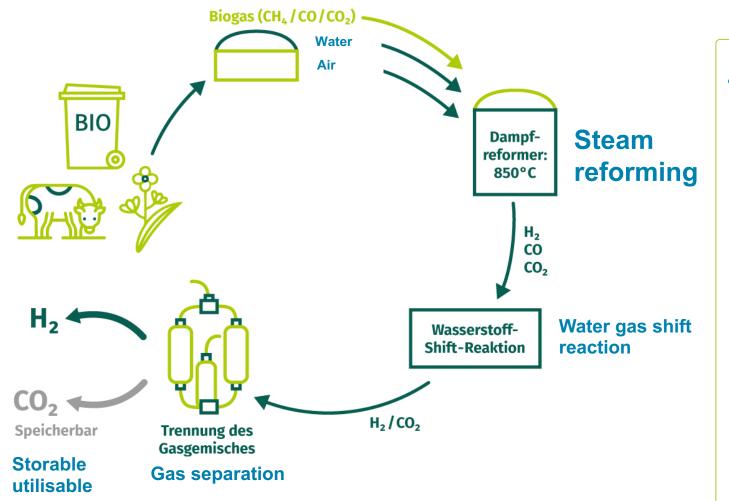
Approx. doubling potential for biomethane (234 TWh -> 435 TWh)

Direct methanation

- Raw biogas is mixed with hydrogen in the fermenter
- Alternative: biologic methanation, e.g., "dark fermentation" and certain bacterial strains produce a methane/hydrogen mixture
- Interaction of CO₂ and methane in the raw biogas increase of the methane content.

Technological options for biomethane production - Hydrogen generation





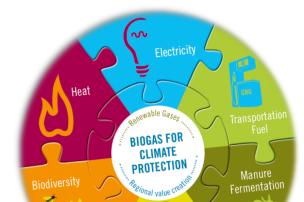
Biogas steam reforming

- "classic steam reforming" with biogas instead of natural gas
- Separation of hydrogen and carbon
- Water gas shift reaction reduces carbon monoxide with water vapor to further hydrogen
- Heat supply through partial combustion of raw biogas



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EU- and nationwide legal framework



Legal Framework





RED II Revision (RED III)

- Energy Efficiency Directive (EED)
- ETD (Energy Taxation Directive)
- LULUCF (Land Use, Land Use Change and Forestry)

• ETS

- Effort Sharing Regulation
- Carbon Border Adjustment Mechanism
- DAFI (Revised Alternative Fuels Infrastructure Directive), CVD
- FuelEU Maritime Initiative
- ReFuelEU Aviation Initiative

Clean Energy GHG Emissions

> CO₂/GHG Taxation

Transport

Overall framework: "Fit for 55 Packet"

- Target: GHG emissions reduction by 55% until 2030, climate neutral by 2050
- Presentation on 14.07.2021, currently under revision
- Reformed or new directives and regulations of the European Commission relating to EU climate policy

RED II: Emissions from biomethane as fuel Business opportunities by GHG trading



Default values in RED II for GHG Emissions (fossil comparator 94 g CO_{2äd}/MJ)

maize whole plant

Biomethane from biowaste

Close digestate, no off-gas combustion

Open digestate, no off-gas combustion

Close digestate, no off-gas combustion

Close digestate, off-gas combustion

Open digestate, off-gas combustion

Close digestate, off-gas combustion

Substrate	g CO _{2eq} /MJ
Manure	-100
Biogenic waste	14
80 % manure + 20 % maize	-12

Disaggregated values along the process chain

Disaggregated default values for biogas for the production of electricity

			TYPICAL VALUE [g CO2eq/MJ]					DEFAULT VALUE [g CO ₂ eq/MJ]				
Biomass fuel production system		Technology	Cultiva- tion	Processing	Non-CO ₂ emissions from the fuel in use	Transport	Manure credits	Cultiva- tion	Processing	Non-CO ₂ emissions from the fuel in use	Transport	Manure credits
	case 1	Open digestate	0,0	69,6	8,9	0,8	- 107,3	0,0	97,4	12,5	0,8	- 107,3
case 1	Close digestate	0,0	0,0	8,9	0,8	- 97,6	0,0	0,0	12,5	0,8	- 97,6	
Wet manure (i) case 2	case]	Open digestate	0,0	74,1	8,9	0,8	- 107,3	0,0	103,7	12,5	0,8	- 107,3
	Close digestate	0,0	4,2	8,9	0,8	- 97,6	0,0	5,9	12,5	0,8	- 97,6	
	case 3 -	Open digestate	0,0	83,2	8,9	0,9	- 120,7	0,0	116,4	12,5	0,9	- 120,7
		Close digestate	0,0	4,6	8,9	0,8	- 108,5	0,0	6,4	12,5	0,8	- 108,5

		EUROPEAN UNION					
	THE EUROPEA	N PARLIAMENT	THE COUNCI				
			Brussels, 21 November 2018 (OR. en)				
VTypical and defaul	t values for biomethane 2016/0382 (CO))	PE-CONS 48/18				
Biomethane production system	Technological option	Greenhouse gas emissions – typical value	emissions – default value				
		(g CO2eq/MJ)	(g CO2eq/MJ)				
	Open digestate, no off-gas combustion ¹	-20	22				
Biomethane from wet manure	Open digestate, off-gas combustion	-35	1				
wei manure	Close digestate, no off-gas combust	ion -88	-79				
	Close digestate, off-gas combustion	-103	-100				
	Open digestate, no off-gas combust	ion 58	73				
Biomethane from	Open digestate, off-gas combustion	43	52				

41

26

51

36

25

10

EURODEAN UNION

51

30

71

50

35

14

Relevance of the RED and the GHG balance in Germany's transport sector

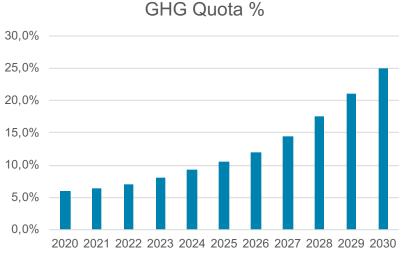
- GHG quota replaces energy quota since 2015
 - since 2015 : 3.5 % GHG reduction
 - since 2017 : 4.0 % GHG reduction
 - since 2020 : 6.0 % GHG reduction
- Everyone who distributes fuel must prove quota fulfilment!

Year	Minimum for energy purposes,	2022	2023	2024	2025	2026 2027	2028 2029	2030
Advanced biofuels quotas (RED II Annex IX Part A)	double credit for amounts above the minimum	0.2 %	0.3 %	0.4 %	0.7 %	1.0 %	1.7 %	2.6 %

- Biomethane as fuel can be used to fulfill quotas
 - Non-compliance is penalised: 0.47 €/kg CO₂ = 600 €/t CO₂
- Double accounting of GHG Quota by over-fulfilling subquota confirmed in RED III Member States can follow their own regulations

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RED II Revision (RED III)

- Higher Renewable Nenergy Goals: 4045 % until 2030
- Generally higher goals

Committee on Industry, Research and Energy

- Buildings sector: EU target of at least 49 % share of RE in buildings in 2030
- Heating and cooling in industry: Annual increase in RE use by 1,11,9 %-points in this sector
- Heating and cooling sector as a whole: member states to increase RE use by 1,12,3 %-points; if waste heat is used, the target increases to 1,52,8 %-points
- District heating sector: annual increase in RE heating/cooling and waste heating/cooling by 2,12,3 %-points compared to 2020
- **Transport sector: new:** assessed against GHG reductions of 1316 % by 2030; if a state chooses not to exhaust biofuels from food and feed up to the 7% limit, the contribution to RE target achievement is correspondingly less.
- Increased sub-quota for advanced biofuels and biogas: 0.2% in 2022, 1% in 2025, and 2.2% in 2030; share of renewable fuels of non-biological origin to be 2.6% in 202830 2,6 %, in 2030 min. 5.7 %







What does this mean?



 Oil crops as the main crop Sugarbeet as main crop 	Not a food and feed crop: • Corn straw (= waste)
	 Cereal (-GPS) as catch crop/cover crop (e.g. green rye). General second crop that does not trigger land requirements.
 Non food plant with cellulose content: Residues from food and feed crops (straw, husks, pods) Grass-type energy crops (ryegrass, switchgrass, miscanthus). Clover grass (especially in organic farming) 	42. "zellulosehaltiges Non-Food-Material" Rohstoffe, die überwiegend aus Zellulose und Hemizellulose bestehen und einen niedrigeren Lignin-Gehalt als lignozellulosehaltiges Material haben; es umfasst Reststoffe von Nahrungs- und Futtermittelpflanzen wie Stroh, Spelzen, Hülsen und Schalen, grasartige Energiepflanzen mit niedrigem Stärkegehalt wie Weidelgras, Rutenhirse, Miscanthus, und Pfahlrohr, Zwischenfrüchte vor und nach Hauptkulturen, Untersaaten, industrielle Reststoffe, einschließlich Nahrungs- und Futtermittelpflanzen nach Extraktion von Pflanzenölen, Zucker, Stärken und Protein, sowie Material aus Bioabfall; als Untersaaten und Deckpflanzen werden vorübergehend angebaute Weiden mit Gras-Klee-Mischungen mit einem niedrigen Stärkegehalt bezeichnet, die zur Fütterung von Vieh sowie dazu dienen, die Bodenfruchtbarkeit im Interesse höherer Ernteerträge bei den Ackerhauptkulturen zu verbessern;

Sustainability in RED III



- Threshold value for gas generation plants: Plants with an average methane flow rate of more than 200500 m³ Methaneequivalent/h must prove sustainability
- threshold value of 2 MW remains: Member States may choose a lower threshold than the 2 MW or the 200500m³ Committee on the Environment, Public Health and Food Safety
- **Union Database** serves as proof of sustainability criteria and GHG savings of liquid and gaseous biofuels and combustibles as well as recycled carbon fuels; recording of all usage paths and quantities **ENVI**

Text proposed by the Commission

(d) at least 70 % for electricity, heating and cooling production from biomass fuels used in installations until 31 December 2025, and at least 80 % from 1 January 2026.;

Amendment



(d) at least 60 % for electricity, heating and cooling production from biomass fuels used in installations starting operation from 1 January 2021 until 31 December 2025, and at least 70 % for installations starting operation from 1 January 2026.;

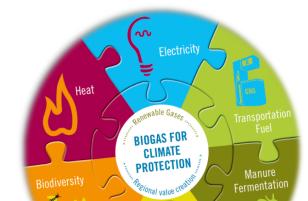
Quelle: EP ITRE 2022

Demonstration of GHG savings from plants starting operation between 2021 and 2025 70%, from 2026 80% also from existing biomass plants.



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Business Concepts



Operator and business model concepts



- Acceptance of raw biogas or biomethane by traders or distributors
 - Low internal efforts
 - Market price dependence

Own yard gas station

- For internal and/or public use
- Bio-LNG more expensive to produce
- GHG Emissions trading possible for distributors to end-users

• Feed-in to gas grid

- Moderate preparation effort
- Purchase agreement with a dealer or gas station operator

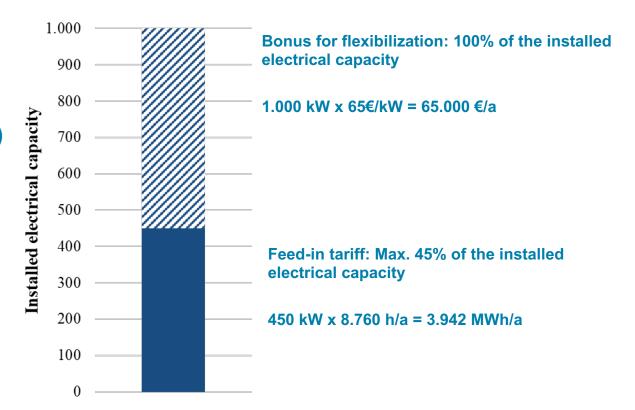
→ In balance sheet terms, the operator extracts 100 % biomethane

- Pooling of biogas/-methane plants
 - Merger of several plant operators:
 - Central processing into biomethane
 - Central processing to bio-C/LNG

Operator and business model concepts Electricity sales



- 45% of the electricity production of the installed electrical power can receive a subsidy
- Feed-in tariffs
 - New plants 16,28 Cent/kWh (2022)
 - Existing plants 18,22 Cent/kWh (2022)
 - Bonus for flexibilization 65 €/kW (installed)
 - Covers only costs for additional CHPs, gas-storage, grid-connection,...
 - Feed-in tariffs = Maximum bidding price
 - Real tariffs are results of tendering rounds



Small Manure Processing Plants

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• Example

- New installation 190 kWel
- approx. 1,500 fattening bulls and calves as well as ren. raw materials
- Despite high heat demand, enough energy for farm and residential buildings



• New in EEG 2023:

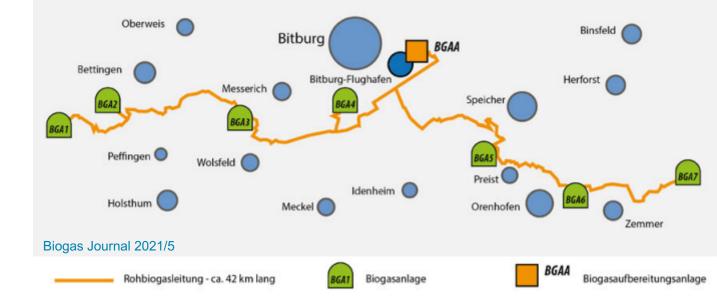
- Electricity from small manure plants
- Proportion of liquid manure in the input mix at least 80%
- Special feed-in tariff: output < 75 kW = 22 cents/kWh + electric output
- 75 150 kW = 19 cents/kWh

Operator and business model concepts Clustering of biogas plants – Example Bitburg/GER





Wikimedia Commons



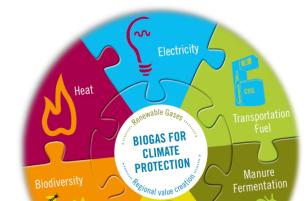
- Municipal utilities Trier: Distribution and sales structures
- Goals:
 - Regional added value
 - Secure and affordable energy supply
- Integration of green hydrogen production
- Individual CHP operation still possible

Eckdaten des Projektes	
Biogaslieferanten	Aktuell 7 Biogasanlagen mit bis zu 900 Nm ³ /h Rohgasvolumen.
Biogassammelleitung	DN 125 250, 42 km lang.
Fassungsvermögen Biogasspeicher	5.300 m ³
Aufbereitungstechnologie	Druckwechsel-Adsoptionsverfahren (PSA)
Aufbereitungskapazität	1.800 Nm ³ /h Rohgas – 1.000 Nm ³ /h Biomethan



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Biomethane as a fuel



Biomethane as a Fuel





• Bio-CNG

- Compressed biomethane
- For passenger cars and light vans



• Bio-LNG

- Liquefied Biomethane
- primarily for heavy goods traffic and maritime or inland waterway traffic

Possibly no market anymore by 2035: Ban of all internal combustion engines in planning

- Decision making criteria
 - Local offtakers (own consumption, vehicle fleets, public access)
 - CAPEX & OPEX
 - Incentives, tax exceptions
 - Long-term outlook (legal framework)



Good chances of being recognised as a climate-neutral fuel

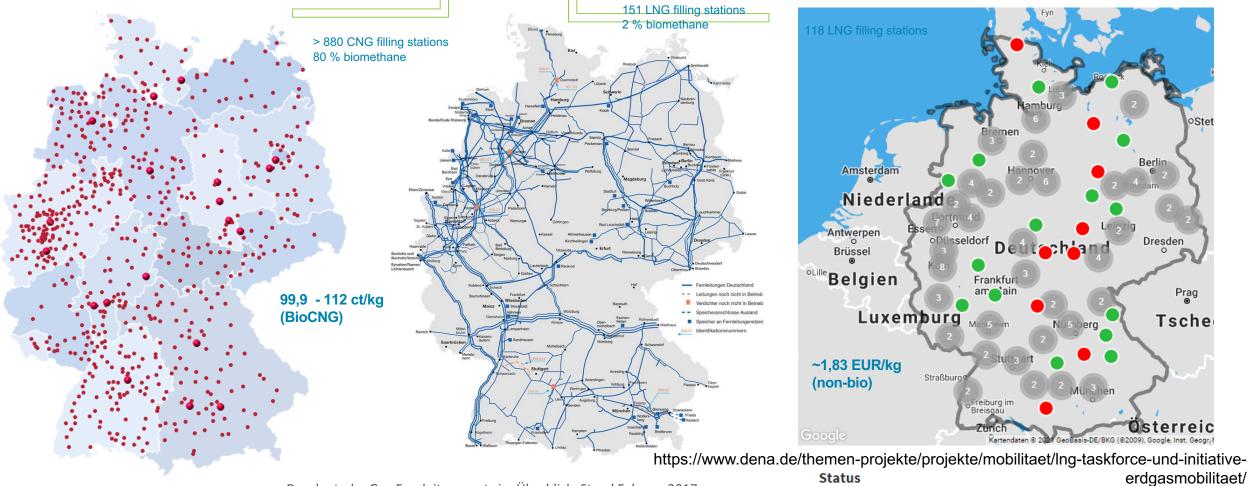
Status Quo "alternative fuels"

Gas Grid in Comparison with CNG und LNG Fuelling Stations



In Betrieb

In Planung



Das deutsche Gas-Fernleitungsnetz im Überblick; Stand Februar 2017 © Fernleitungsnetzbetreiber

https://www.gas24.de/cms/291-0-erdgastankstellen-uebersicht-deutschland.html

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19.05.2023

https://gwf-gas.de/maerkte-und-unternehmen/orangegas-fuehrt-bundesweit-einheitliche-preise-fuer-bio-cng-ein/

Stel

Legal framework Alternative Fuels Infrastructure Regulation



DIRECTIVE 2014/94/EU OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL

of 22 October 2014

on the deployment of alternative fuels infrastructure

(45) LNG, including liquefied biomethane, might also offer a cost-efficient technology allowing heavy-duty vehicles to meet the stringent pollutant emission limits of Euro VI standards as referred to in Regulation (EC) No 595/2009 of the European Parliament and of the Council (3).

(48) An appropriate number of LNG and CNG refuelling points accessible to the public should be put in place by 31 December 2025, at least along the TEN-T Core Network existing at that date and, after that date, on the other parts of the TEN-T Core Network where these are made accessible to vehicles.

(58) In the application of this Directive, the Commission should consult relevant expert groups, including at least the European Expert Group on Future Transport Fuels, consisting of experts from industry and civil society, as well as the Joint Expert Group on Transport & Environment, which brings together experts from the Member States.

"The increased deployment and use of renewable and low-carbon fuels must go hand in hand with the creation of a comprehensive network of recharging and refuelling infrastructure based on a geographically fair manner to enable the widespread uptake of lowand zero-emission vehicles in all transport modes"

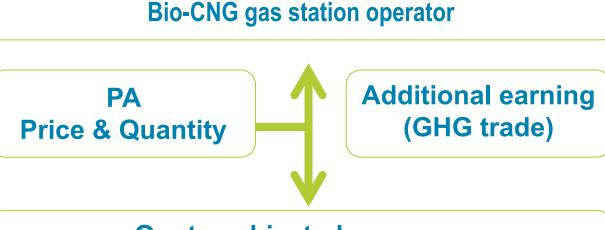
Proposal for the revision of the AFIR

Example Bio-CNG gas station grid



Biogas plant in Northern Germany

- Supplies 14 gas stations (partly selfowned) – "as balance"
- Clients are logistics vehicle fleets, mobile care services, public transport, individuals – in a local context



Quota subjected company (e.g., mineral oil company)

Trade with THG quota

- Offtakers such as companies with a high CO₂ footprint
- 2-3 times higher revenues as the earnings from the gas station itself



Example Bio-LNG gas station for transport fleet

- Pilot project
 - Shell
 - EDEKA Hannover-Minden (Lower Saxony)
 - IVECO

- Goals
 - Vehicle fleet conversion
 - 100 % Bio-LNG from 2023 onwards



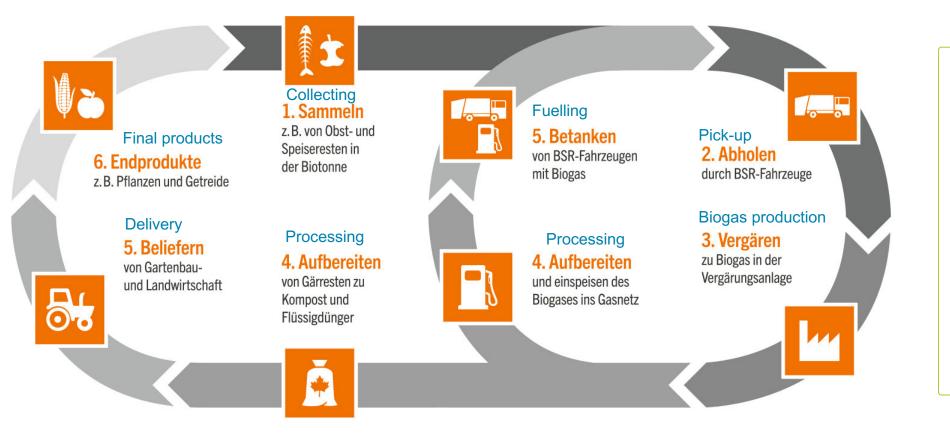


Source: gas24.de (Shell, EDAKA Minden)

- Key data tractor unit
 - Two 540 I tanks
 - \rightarrow up to 1.600 km range

Example Bio-CNG from biogenic waste for garbage trucks



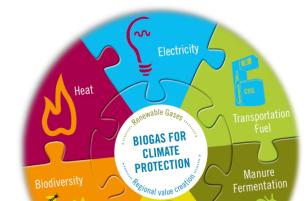


- Local waste handling provider BSR
- Biogenic household waste
- 160 garbage trucks run on CNG – half of the fleet



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Conclusion and outlook



Conclusion and outlook

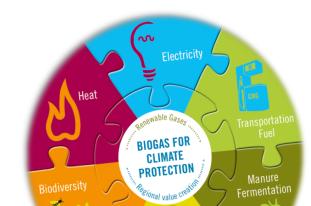


- Implementation of RED II by 2021 offers opportunities for biogas/biomethane, especially for renewable gases from manure, biogenic waste, straw, etc.
- Revision of Fit for 55 package, RD II->III, CVD
- Further development also depends on the design of the political framework
 - Extension of toll exemption (CO₂ component expected)
 - Promotion of vehicles & fleet conversion
 - Energy tax and trade regulations, also EU-wide
- Biomethane is in direct competition with other options
 - hence the options need to be technology neutral and utilised where applicable now
 - \rightarrow Well to wheel vs tailpipe approach



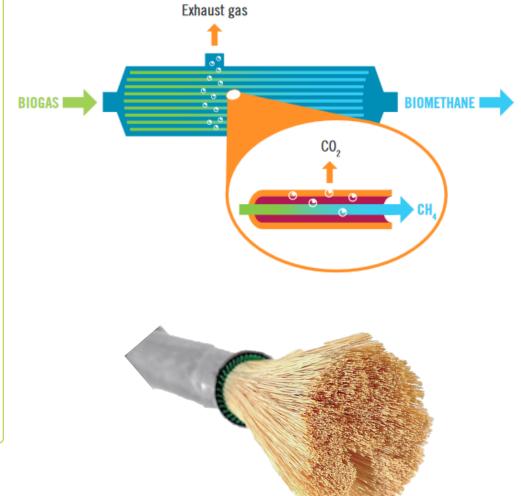
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Technological options for biomethane production



Processing Technologies – Membrane Separation





Characteristics

- Based on the principle of the different permeability velocities of the various gases: CO2 has a permeability 20 times higher than CH4.
- Pressure of 7 20 bar to accelerate the process.
- Therefore, no additional compression required for gas grid injectionTube bundle interconnection in two- or three-stage cascades → Increase in purity

Processing Technologies – Membrane Separation

Advantages

- Few moving parts
- Robust construction
- Modular design possible (for future extensions)
- Can be adapted to smaller volume flows

- Methane loss to be observed
- Lean gas burner is advisable or required
- Electricity demand between 0.18 0.33 kWh per m³ biogas
- Increasing importance in recent years





Processing Technologies – Physical or Chemical Scrubbing

- Different solubility of gas components in different liquids: CO₂ dissolves better in water than CH₄.
- Most important influencing variables:
 - Properties of the solvents used
 - Solubility of gas components
- Differentiation between physical and chemical scrubbing:
 - Physical Scrubbing
 - physical solubility of the gas components in a wash solution without chemical reaction.
 - Chemical Scrubbing
 - Some gases (CO₂ and H₂S) react reversibly with the scrubbing liquid: mixture of water and additives such as MEA, DEA, MDEA (amines), etc.

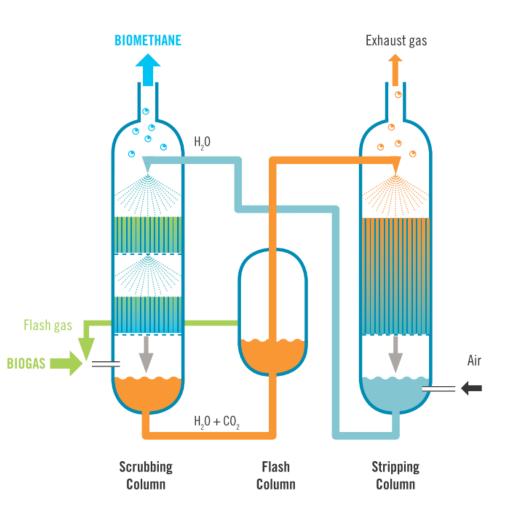




Processing Technologies – Physical and Chemical Scrubbing

Physical Scrubbing:

- Pressure: 4 to 10 bar
- Water is sprayed from the top and the biogas is fed from the bottom of the scrubbing column to the top.
- CO2 dissolves in the water, CH4 remains in the gas.
- The purified gas is extracted at the top of the scrubbing column. The water containing CO2 is collected at the bottom of the column and regenerated in a two-stage process.
- For chemical scrubbing, a solvent (mostly aminebased) instead of water is used.





Processing Technologies – Physical Scrubbing

Advantages

- Technically mature process: widely used for years
- Water is an environmentally friendly and cost-effective solvent
- external heat source not necessary: excess heat can be used elsewhere

- Pressure requirement between 4 and 10 bar
- Power requirement between 0.2 and 0.3 kWh/Nm³ biogas
- Methane losses between 1 and 4 %.
- Water is less selective than other solvents





Processing Technologies – Chemical Scrubbing

Advantages

- Allows higher solubility and higher loading of the scrubbing liquid
- Less surface area required: smaller installation area
- Product gas is dried by a hydrophobic scrubbing solution

- Heat is required for the regeneration of the scrubbing liquid.
- Solvent must not be released into the environment
- Methane losses relatively low observation required
- Electricity requirement



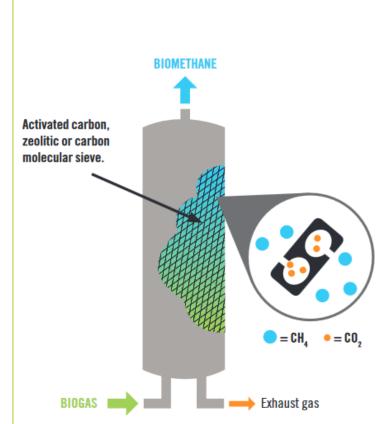
Processing Technologies – Pressure Swing Adsorbtion

Principle

 different gas components are attracted (adsorbed) to certain surfaces to different degrees or penetrate the pores of the material to different degrees In principle, adsorption is higher at higher pressure and lower temperatures.

Process Steps

- Compression of the pre-cleaned biogas
- Cooling: Smaller CO2 molecules accumulate to a much greater extent than CH4 molecules.
- The biomethane is released through the column head.
 Depressurization inside the column : CO2 dissolves from the surfaces, returns to the gas phase and is vented.





Processing Technologies – Pressure Swing Adsorbtion

Advantages

- Many reference plants and many years of operating experience
- No solvents are used
- No heat is required for regeneration

- High mechanical stress on the plant due to the high speed of filling, pressurization and unloading of the column.
- Energy demand
- Methane losses
- Lean gas burner required



Dirk Bonse 01.03.2023

Biomethane Production

Processing Technologies – Cryogenic Separation

- Based on the fact that gases condense or resublimate at low temperatures or high pressure.
- Strong compression of the biogas to 65-80 bar (condensation points).
- Additional separation of water and H_2S by condensate separator.
- Partial liquid CH₄ is produced, which is marketed as LNG in regions without connection to the gas grid or as a fuel.

- Very clean separation of the gases
- High purity CO2 for further use



- Extremely energy-intensive
- Still few installations and providers





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Thank you for your attention!

Any questions or comments?

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