NEWS REVIEW

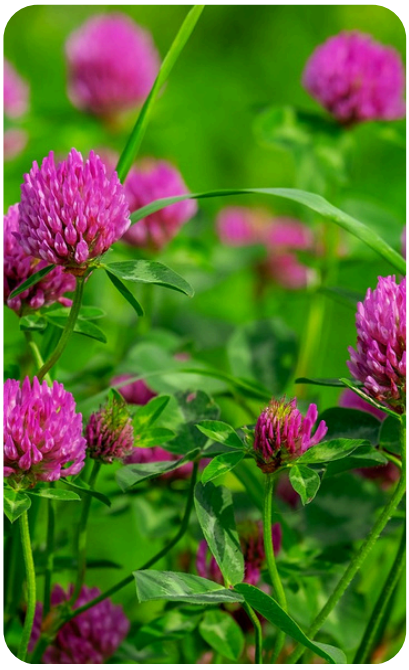
Alder BioInsights

June 2026

Bioenergy

Each month we review the latest news and select key announcements and commentary from across the bioenergy sector.

Announcements & Commentary



Research & Development

Providing clients with a strategic view of feedstock, technology, policy and marketing opportunity across the bioeconomy.

FOREWORD

Welcome readers, to this month's Bioenergy News Review.

As the bioenergy sector advances, supportive policy frameworks are proving essential to unlocking investment, scaling production, and integrating renewable gases into existing energy systems. This edition of the newsletter highlights encouraging policy developments across multiple continents.

Europe's biomethane sector stands at a critical juncture, according to a recent Ifri (French Institute of International Relations) analysis. The analysis argues that Europe's ambitious biomethane expansion goals can only be achieved through stronger policy coordination across member states. The industry is currently shifting from a subsidy-reliant model to market-driven mechanisms like blending mandates and Biomethane Purchase Agreements (BPAs). However, while investment interest remains high and production capacity continues to grow, fragmented permitting systems, inconsistent grid access regulations, and uneven national implementation risk slowing progress. Europe's experience highlights an increasingly important lesson for the global bioenergy sector: market ambition without policy harmonisation creates bottlenecks that technology alone cannot overcome.

Meanwhile, large Asian economies are taking state-backed actions to secure their domestic biogas supply chains:

- India is preparing to launch its new `Sampoorn' program. Aimed at drastically cutting fossil fuel import dependencies exposed by recent global energy volatility, the initiative will offer higher guaranteed purchase prices for compressed biogas (CBG) and financial incentives to expand India's operational plants from 200 to 700. The policy also dual-purposes as an environmental solution to curb seasonal agricultural residue burning.

- South Korea is also looking inward to secure technical autonomy. The Ministry of Climate, Energy and Environment has launched a £20.8 million program running through 2029 to localise key technologies for biogas power generation. By developing domestic, specialised components capable of handling corrosive biogas impurities, South Korea aims to eliminate reliance on imported generator systems as its mandatory biogas production laws take effect.

FOREWORD

In Mexico, the VI National Biogas Technical Forum underscored a clear message: regulation must catch up with technology. Industry leaders and government officials emphasized integrating biomethane as a complementary, domestically produced molecule into existing natural gas infrastructure rather than replacing it. With over 56,000 tonnes of organic waste generated daily, the primary bottleneck remains the absence of specific technical standards for grid injection, gas quality, metering, and safety. The newly established National Energy Transition Standardization Committee is expected to deliver these critical norms, enabling commercial-scale projects and enhancing energy sovereignty.

Read on for the latest news

Policy

Mexico moves to formalise biomethane regulation

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The VI National Biogas Technical Forum concluded on May 27 at the Mexican Petroleum Institute, focusing on establishing a commercial-scale industrial roadmap to convert organic waste into energy assets and biomethane. Industry leaders shifted the narrative away from replacing existing fossil fuel infrastructure, framing biomethane instead as a locally produced complement that can seamlessly integrate into Mexico's current natural gas distribution networks to boost energy sovereignty.

The primary barrier to scaling this market remains an institutional bottleneck: Mexico lacks specific technical standards and grid injection norms governing gas quality, metering, and pipeline safety. While companies like Brimex Energy showcase the technical viability of commercial-scale waste processing, project developers and gas distributors are restricted from network integration until the recently installed National Energy Transition Standardization Committee formalizes these grid regulations.

The VI National Biogas Technical Forum concluded on May 27 at the Auditorio Bruno Mascanzoni of the Mexican Petroleum Institute in Mexico City, closing three days of technical sessions, panel discussions, and bilateral meetings that brought together federal authorities, state governments, private companies, academia, and international organisms under a single operational objective: establishing the industrial roadmap that would allow Mexico to convert its organic waste into energy assets and biomethane at commercial scale.

Click here for more information

The European Biomethane Sector at a Critical Juncture: Stronger Policy Alignment Will Matter

Since Ifri published its first biomethane assessment in 2019, the industry has undergone a rapid transformation driven by European Union (EU) decarbonization objectives, security-of-supply concerns, methane reduction policies, and rising pressure to produce low carbon energy domestically. These structural policy drivers have made biomethane a strategic asset for the European energy transition. It is a dispatchable, storable, domestically produced drop-in substitute for natural gas. It is the only renewable gas that can be immediately deployed at scale, using existing infrastructure. Biomethane delivers deep—sometimes negative—emissions reductions while providing system-wide socioeconomic and local benefits. It can help reduce dependence on imported fertilizers.

Click here for more information.

South Korea to invest $27.5 million in domestic biogas generator development

South Korea's Ministry of Climate, Energy and Environment is launching a 36.6 billion won (approximately $27.5 million) programme to localise key technologies for biogas power generation systems, reducing reliance on imported generators and components as the country's biogas market expands.

The funding — comprising 26 billion won from the national budget and 10.6 billion won from the private sector — will run from 2026 to 2029.

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Market

US Dairy Biogas Capacity Triples in Five Years

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Massive capital injections drive a rapid green energy boom across American milksheds as farms convert cattle manure into high-value renewable natural gas.

The landscape of the United States dairy sector is undergoing a profound environmental and economic transformation, with the number of commercial dairy farms capturing green energy from manure nearly tripling since the end of 2020. According to the latest comprehensive market data released by the American Biogas Council (ABC), the adoption of anaerobic digestion technology has accelerated at an unprecedented pace. There are now 496 operational dairy-based biogas systems active across the nation, representing a major structural shift toward circular economy practices and enhanced on-farm revenue diversification.

Click here for more information.

India Plans Biogas Incentives To Cut Fossil Fuel Imports, Boost Domestic Output

India is preparing to roll out a new policy aimed at increasing biogas production through higher guaranteed purchase prices and subsidies for new projects, as the government looks to reduce carbon emissions, lower dependence on imported fossil fuels and address rising energy costs.

India has been attempting to scale up biogas production for much of the last decade, though output has remained below earlier targets. The renewed push has gained urgency amid the Iran conflict, which has exposed India's vulnerability to global energy price fluctuations and supply disruptions. India imports nearly half of its gas requirements, much of which passes through the Strait of Hormuz.

The new programme, named Sampoorn, will be implemented by the Ministry of Petroleum and Natural Gas, according to people familiar with the matter. The ministry did not immediately respond to an email seeking comment.

Click here for more information.

Biogas

Ammongas enters the Spanish market with upgrading system for biomethane project

Ammongas, part of European Energy, has signed an agreement to supply a complete biomethane upgrading system for a new biomethane facility located in Llíria, near Valencia, Spain. The upgrade will reduce methane emissions of the upcoming facility ensuring compliance with regulatory demands in EU. The upcoming facility is expected to be capable of reusing more than 80 percent of the heat used in the process.

The facility, which is owned by the company The Green Vector – a JV owned by Enagas Renovables and Genia, will transform biogas generated from agrifood and livestock waste into high-quality biomethane suitable for injection into the Spanish gas grid, using the Best Available Techniques (BATs) and contributing to the decarbonisation of the energy system while promoting circular economy solutions for the agricultural and livestock sectors.

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Schroders Greencoat invests in Dutch biomethane platform

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Schroders Greencoat, the energy transition infrastructure manager at British asset manager Schroders Capital, has acquired a biomethane platform in the Netherlands to expand its footprint in the sector.
The company has acquired a 100% stake in APF Energy, a platform previously owned by SWEN Capital Partners, a Paris-headquartered private market investor.

Click here for more information.

The AI platform modernising Britain's biogas industry wins £1 million Manchester Prize

ADBA member BiofuelAi wins £1 million Manchester Prize for AI-powered technology that could reduce UK carbon emissions by 293,000 tonnes annually—the equivalent of avoiding emissions from heating more than 133,000 homes with natural gas.

The UK's flagship award for artificial intelligence innovation recognises BiofuelAi's technology, which enables biogas plants to make smarter operational decisions, increasing renewable energy production while reducing costs and carbon emissions.

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Circularity Fuels Completes World's First End-to-End Conversion of Agricultural Biogas into Sustainable Aviation Fuel

Circularity Fuels has announced the completion of what it describes as the world's first end-to-end conversion of raw agricultural biogas into sustainable aviation fuel. The six-month pilot drew biogas directly from the manure digester of a California dairy farm, processing it without pre-treatment through an integrated system developed entirely by the company.

The raw biogas — roughly 65% methane and 35% CO_2 — was fed directly into Circularity's on-site system over thousands of operating hours. The resulting fuel meets ASTM D7566 Annex A1 (FT-SPK) specifications, the international standard required for blending with conventional Jet-A in commercial aircraft. It can be blended at up to 50% with Jet-A fuel and used in existing aircraft today with no engine modifications.

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British Columbia regulator upholds RNG definition

British Columbia's Utilities Commission (BCUC) has concluded that no major changes to its definition of renewable natural gas (RNG) are warranted, following an inquiry into whether existing rules adequately account for greenhouse gas reductions from biomethane purchased outside the province.

The final report, published on 26 May 2026, confirms that public utilities may continue to acquire biomethane and its associated environmental attributes from out-of-province sources — including locations with no physical pipeline connection to BC — provided those attributes are transferred to customers and retired at the point of sale.

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PGB Expands Biogas Plant in Dzierżki, Increasing Capacity to 1.498 MWe

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Polska Grupa Biogazowa has completed the expansion of its biogas plant in Dzierżki by adding a new 0.5 MW cogeneration module. The investment will increase the plant's capacity to produce electricity and heat, while also expanding local technological and energy infrastructure.

On 11 June 2026, Polska Grupa Biogazowa completed the expansion and modernisation of the biogas plant in Dzierżki, including the installation of an additional 0.5 MW cogeneration module. According to Patryk Jóźwiak, Management Board Member and Chief Operating Officer at PGB, the investment represents another stage in the development of modern biogas infrastructure and in improving the efficiency of existing installations.

Click here for more information.

MOL expands the Szarvas Biogas Plant with a biomethane unit

MOL is expanding the Szarvas Biogas Plant with a biomethane unit. As a result of the development, the plant is able to produce biomethane from biogas of such purity that it can be fed into the national natural gas network. The facility is expected to be completed by the end of the year and will produce more than 7 million cubic metres of biomethane annually, replacing natural gas in the gas network.

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Click here for more information.

Carbon Capture

E.ON selects Capsol for carbon capture feasibility study in Norrköping

Capsol Technologies ASA has been awarded a feasibility study by E.ON to evaluate carbon capture solutions for E.ON's biomass and waste-to-energy operations in Norrköping, Sweden.

The study will assess the potential deployment of Capsol's carbon capture technology for a facility with a capture capacity of up to 500,000 tonnes of CO2 per year. The feasibility study will be executed together with a strategic engineering partner and builds on experience gained from similar carbon capture projects.

Capsol won the study through a competitive tender process. The project forms part of E.ON's evaluation of carbon capture opportunities at its Norrköping site and supports the company's broader decarbonization ambitions. Biomass and waste-to-energy facilities are a strong fit for Capsol's carbon capture technology, offering an attractive pathway for operators seeking cost efficient CO2 capture solutions to support their decarbonization strategies.

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Air Liquide starting a CO2 capture pilot unit dedicated to the decarbonization of cement industry

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Air Liquide announces the start-up of its first industrial-scale pilot unit specifically designed for the cement sector, based on its Cryocap™ proprietary technology. This pilot is located at the CaptureLab launched by Holcim and is a significant milestone to support the scaling up of industrial carbon capture solutions in hard-to-abate sectors. The Cryocap™ FG (Flue Gas) is a version of Cryocap™ in particular designed for the cement sector. As part of Cryocap™ FG, this industrial-scale pilot unit introduces key technologies for the pre-treatment of flue gas, which remains one of the primary challenges in the decarbonization of these hard-to-abate sectors. With a capacity of 3,000 Nm^3/h of flue gas, the unit enables the removal of impurities from the flue gas and preconcentration of CO_2 prior to final CO_2 purification, an essential step for reliable and large-scale deployment of carbon capture technologies for the cement industry.

Click here for more information.

Power

More than 100 Norfolk jobs at risk at Thetford plant

The power station, off the A134 on the edge of Thetford Forest, could have to close because of the end of the Renewable Obligation Certificate (ROC) scheme.

Run by Melton Renewable Energy, the Thetford Power Station burns chicken litter, such as droppings and feathers, to generate energy, with the ash which is produced sold as fertiliser.

Click here for more information.

Hydrogen

Plans submitted to build waste-to-hydrogen plant

An application has been submitted to build a waste-to-hydrogen plant in Kent.

The applicant, Hydrogen Transition Energy (HTE), based at the Kent Innovation Centre in Broadstairs, said the facility was designed to convert non-recyclable waste which can be used for clean fuel. The proposed facility would be close to Manston Airport, near Ramsgate, on a 16-acre site and would be the UK's "first commercial-scale waste-to-hydrogen facility", it said.

The facility would also support industrial decarbonisation while reducing reliance on landfill and fossil fuels, HTE added.

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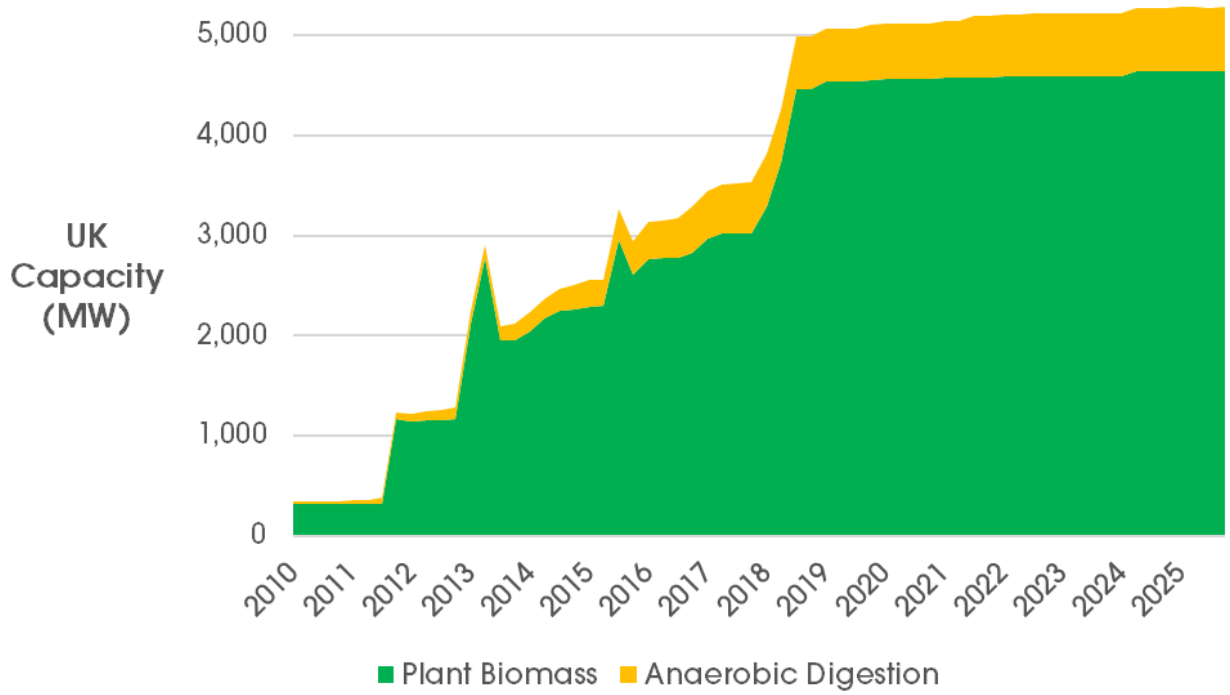
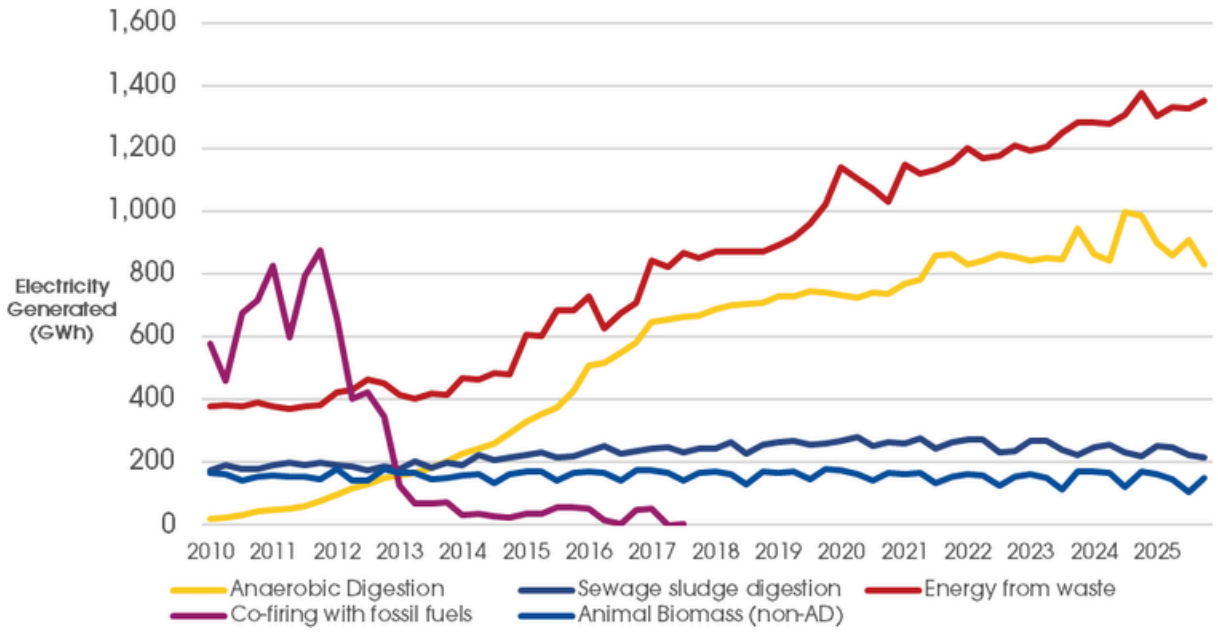
Deployed biopower capacity

Quarterly information on installed electricity generation capacity from plant biomass and AD (Office for National Statistics)



Quarterly information on UK renewable electricity generated from various bioenergy resources (Office for National Statistics)



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Alder Bio Insights is a leading international consultancy with expertise on the conversion of biomass to bioenergy, biofuels and biobased products.

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