

Making Biogas Happen

Charlotte Morton OBE

Budapest Biogas Summit

WORLD BIOGAS ASSOCIATION

About WBA

Founded in 2016 to lead the global transition from waste to vital bioresources

Accredited member and partner of key international organisations

#MBH: the engine for regulatory de-risking, technical standardisation and structured project pipeline development

Global Methane Initiative

Food and Agriculture Organization of the United Nations

CLIMATE & CLEAN AIR COALITION TO REDUCE SHORT-LIVED CLIMATE POLLUTANTS

iea

Global Methane Hub

REN21

UNIDO

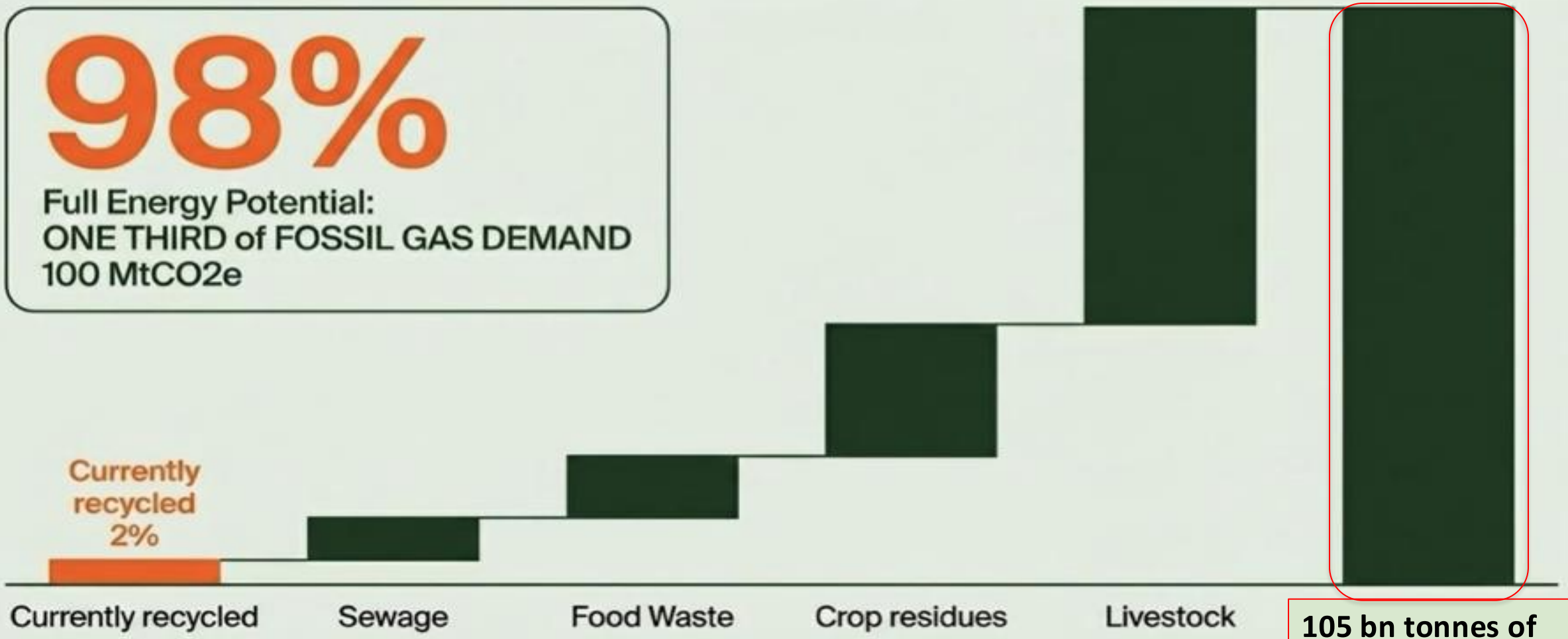
UNFCCC

NotebookLM

Untapped potential

98%

Full Energy Potential:
ONE THIRD of FOSSIL GAS DEMAND
100 MtCO2e



105 bn tonnes of organic waste

A $100BN+ investor-ready infrastructure opportunity

Biogas is the only commercially proven technology capable of simultaneously decarbonising heating, heavy transport, and baseload power.

A $100BN+ untapped sector with the potential to reduce global emissions by 11%.

UN identifies required circular economy systems change as a **$32 trillion investment opportunity**.

IEA confirms the bioenergy sector will be the **second-fastest growing renewable energy fuel source** by 2050.

Signatories to the Global Methane Pledge represent **70% of the global economy**, providing unprecedented government alignment.



Global biogas market today

40 bcme	10 bcme	USD 2 billion
of natural gas equivalent of biogas produced annually	of biomethane produced annually	Investment in the sector annually

significant growth experienced between 2021 and 2023

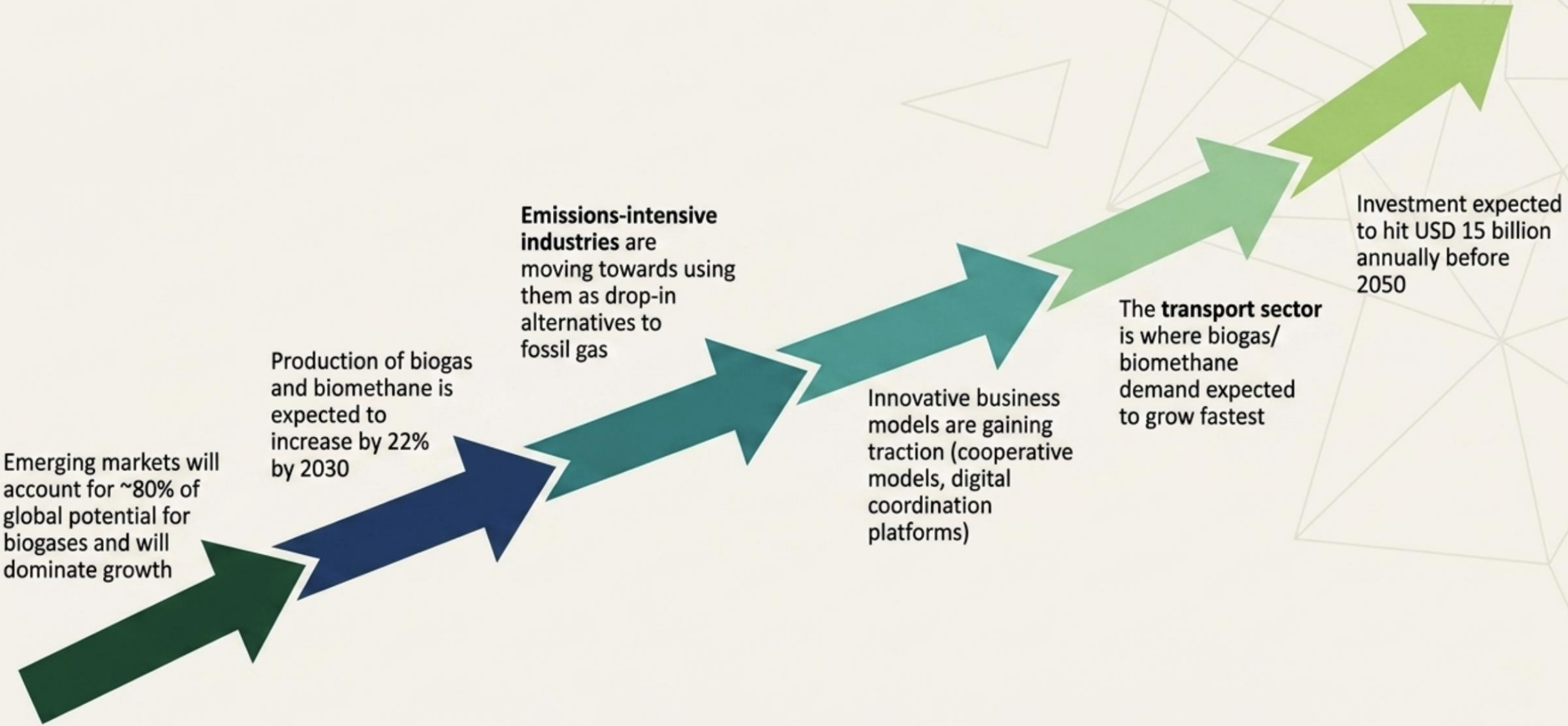
Source: IEA, 2025

Regional Current Market Insights

Europe	most dominant region with almost half the production of biogas and biomethane worldwide
	EU: 21 bcm of biogases produced annually (7bcm of biomethane)
North America	USA: 15 bcm produced annually (3.6 bcm of biomethane)
	Mexico: 0.11 bcm of biogas per year
Asia	China: 15.9 bcm produced annually. Very little is upgraded to biomethane.
	India: 3.2 bcm per year of CBG
South America	Brazil: 2.9 bcm produced annually (0.075 bcm of biomethane)

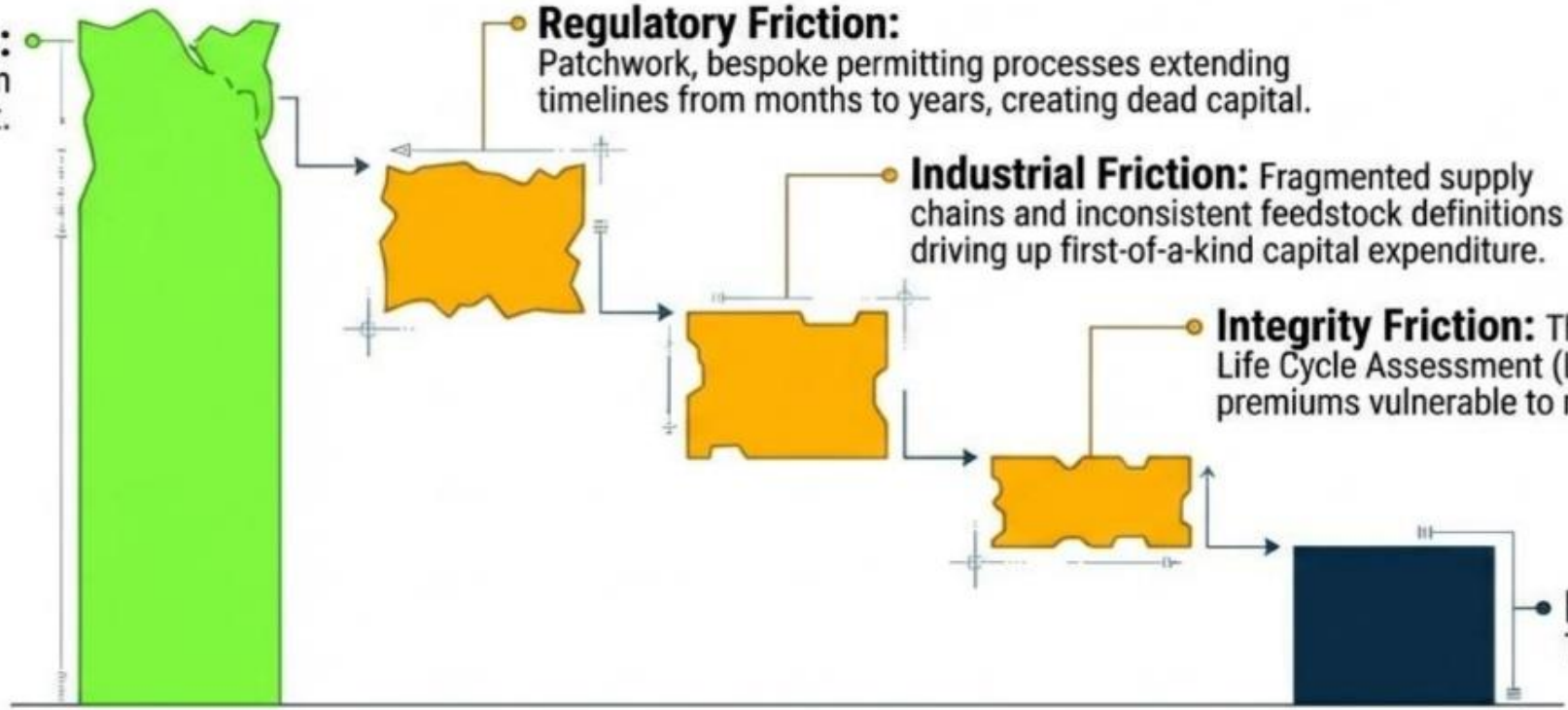
⚠ *Caveat: The figures above are estimates based on varied sources, public reports, and conversion assumptions. Actual numbers may vary.*

Global biogas market – looking forward



Capital is No Longer the Bottleneck; Standardisation Is

Theoretical project returns are continually eroded by bespoke operational realities. The industry currently lacks the global operating system required to standardise asset delivery.



Key Takeaway: We must move away from isolated waste management mentalities toward unified energy infrastructure deployment.

#MBH: From Fragmentation to Global Industrialisation

The Paradigm Shift Matrix

	Current State (Waste Management)	Target State (Energy Infrastructure)
Investment Scale	Single-asset, bespoke project finance	**Repeatable, portfolio-scale capital deployment**
Supply Chain	Fragmented, localized, with high first-of-a-kind engineering costs	**Standardised components, global procurement, predictable CapEx**
Human Capital	Informal, localized knowledge transfer	**Globally certified, professionalised workforce mitigating operational risk**
Data & Performance	Siloed, reactive asset management	**AI-driven, predictive benchmarking across cross-border portfolios**

Protecting the Asset

Without an audited, globally recognised standard, the intrinsic value of the biogas—its carbon intensity—is vulnerable to regulatory shifts and market skepticism.

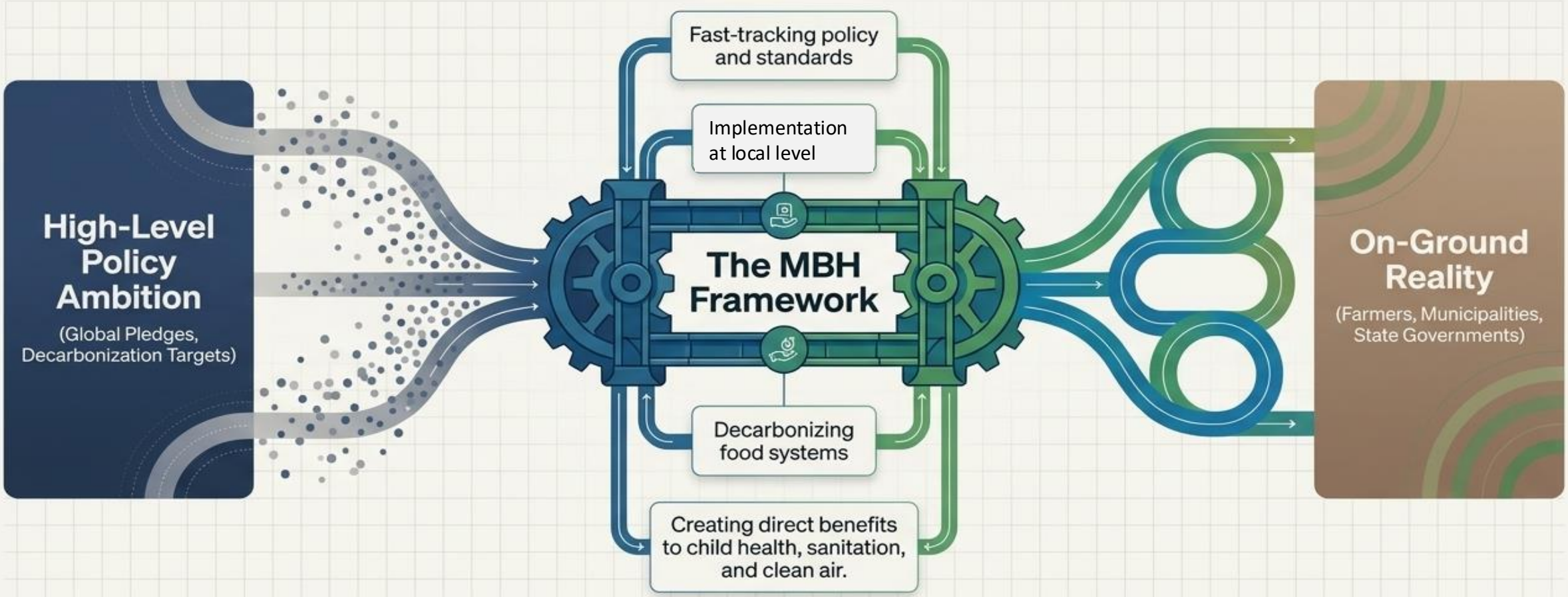
ADCS (Anaerobic Digestion Certification Scheme): Ensuring operational excellence and safety benchmarking.



standardised LCA: Providing the definitive, audited methodology for calculating carbon intensity.

These frameworks ensure regulatory compliance for carbon reporting, locking in the asset's Green Premium and preventing margin erosion.

MBH provides the institutional architecture needed to move from policy ambition to on-ground execution.



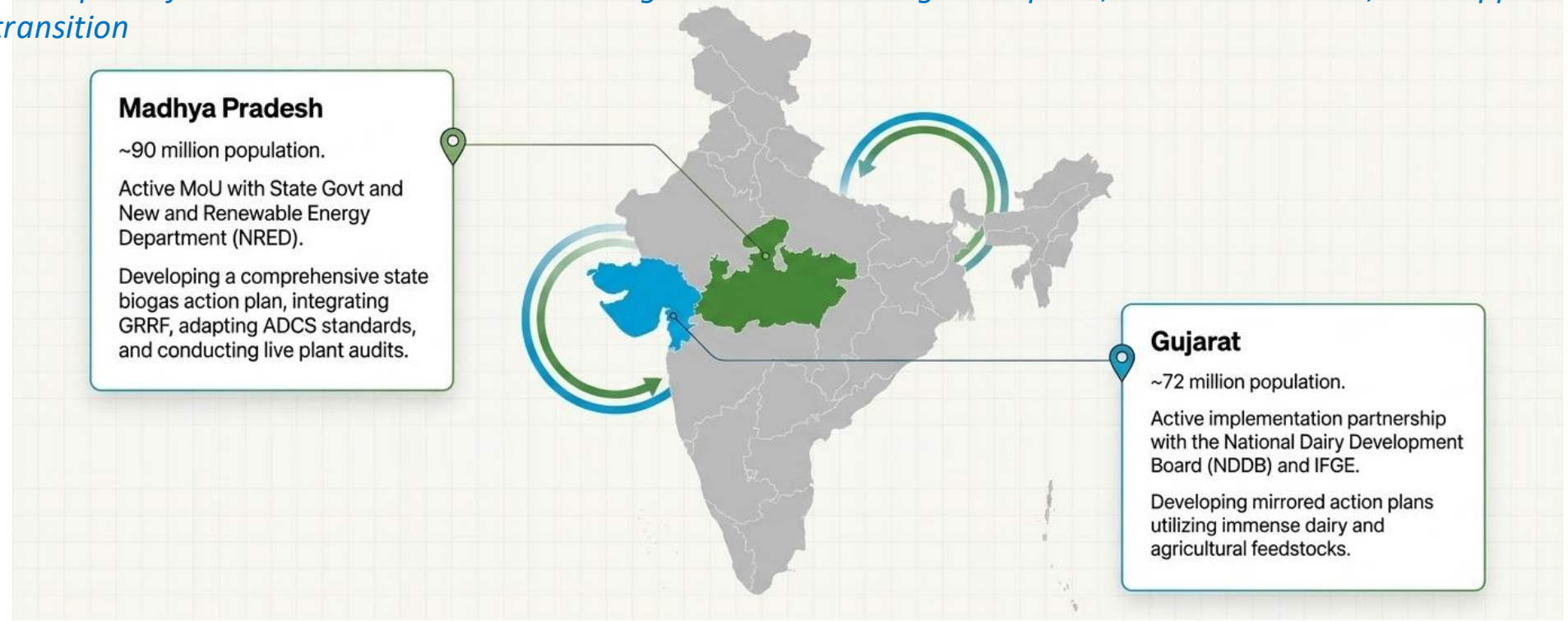
We aren't just building plants; we are operationalizing a systemic transition for organic waste.

#MBH Implementation in India

- **National-Level Advocacy**: Establishes unified policies, standards, and financing frameworks—working on building consensus for National Biogas Mission.

- **State-Level Implementation**: Enables localized action plans aligned with feedstock, infrastructure, and market realities—turning biogas potential into scalable, on-ground projects.

Integrated Impact of state execution with national alignment to scale biogas adoption, drive investments, and support India's clean energy transition



WORLD BIOGAS ASSOCIATION

www.worldbiogasassociation.org

Join Us!

World Biogas Summit & Expo 2026,
8-9 July, Birmingham, UK

World Biogas Association India Congress 2026,
8-9 October, New Delhi, India

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