

## GreenMeUp project for Accelerated Biomethane Uptake Across Europe and Beyond

Brussels | 3rd of July 2025 | Last GreenMeUp Policy Workshop

"GreenMeUp was established to facilitate the wider market uptake of biomethane in the EU, particularly in **less-developed Member States**, through science-based evidence and tailored measures"

Said Myrsini Christou, Head of Biomass Department at CRES, who leads the project. The project's approach, aligned across **Market, Policy, and Society** pillars, involved evaluating framework conditions in advanced and target European countries, engaging stakeholders, and designing country-tailored policy measures.

Key Messages and Best Practices for Future enhancement of the EU Biomethane Market:

From a **Policy Perspective**: GreenMeUp's findings underscore the critical role of robust and coherent policy frameworks. Best practices for accelerating biomethane deployment include:

- **Setting a Stable, Long-Term Vision**: countries that have successfully grown their biomethane markets, such as Denmark, France, and Italy, established clear strategies, action plans, and binding renewable gas targets, often increasing their indicative targets in response to geopolitical developments.
- **Diverse Support Mechanisms**: while open-access feed-in tariffs are effective for market launch, transitioning to auction-based systems encourages cost-effectiveness. The incorporation of mandates and incentivizing specific feedstocks, like manure, further strengthens market emergence.
- **Enhancing the Business Case**: removing barriers to digestate marketing as fertilizer (e.g., Sweden) and mandating food waste collection with anaerobic digestion as the preferred treatment (e.g., UK) significantly improves producer profitability.
- **Enabling Grid Access and Market Recognition**: establishing a "right to inject" biomethane into gas grids, implementing cost-sharing mechanisms for grid connection CAPEX, and creating robust Guarantees of Origin (GoO) systems are vital for market access and green value recognition.
- **Strong Demand Signals**: mandatory targets for advanced biofuels, tax exemptions for biomethane consumption, and equal treatment in public procurement are effective in spurring demand.
- **Integrated Strategies**: the EU's commitment through the REPowerEU Plan, Biomethane Action Plan, and the Green Deal Industrial Plan provides significant R&I support and funding, with proposals for a new biogas network of Member States as part of "tripartite contracts" to strengthen cooperation and optimize permitting.

From a **Market Perspective**: the European biomethane market is experiencing rapid growth, with production doubling in four years (2019–2023) to 5 billion cubic meters and over 100 new plants annually since 2020.

- **Investment and Growth Potential**: despite a committed €27 billion investment by industry by 2030, market conditions need further adaptation to meet the ambitious 35 bcm target. Greenfields dominate new investments, but conversions of existing facilities offer untapped potential.

- **Innovative Feedstock and Technologies:** there is a clear trend towards utilizing agricultural residues, manure, and organic municipal solid waste. **Research and innovation** focuses on sequential cropping, perennial crops, and using marginal lands to maximize biomass production. **Technological advancements** in anaerobic digestion, biogas upgrading (membrane systems, VPSA), CO<sub>2</sub> liquefaction, Gas-to-Liquid (GTL) conversion for SAF, and digestate post-treatment (e.g., biochar production) are crucial for unlocking more cost-competitive potential and valorizing co-benefits.
- **Global Collaboration:** GreenMeUp's scope extends to **Mission Innovation countries** like India, China, and Canada, revealing **diverse policy landscapes** and market opportunities. India, for instance, has implemented a CBG Blending Obligation and is exploring renewable gas certificates. China is shifting to large-scale digesters with targets to cover 5% of natural gas consumption by 2030 and significant policy innovations in grid access and subsidies. Canada is also growing its RNG market with renewable gas mandates in provinces like Quebec and British Columbia.

From a **Societal Perspective:** **social acceptance** and **awareness** are fundamental for successful biomethane deployment.





- **Addressing Awareness Gaps:** GreenMeUp's extensive citizen survey across 11 countries revealed significant **gaps** and **misconceptions** regarding biomethane. Targeted awareness-raising campaigns and educational activities are crucial to inform citizens about the economic, social, and environmental benefits.
- **Fostering Community Acceptance:** while general acceptance of biomethane facilities is higher at country and regional levels, attitudes vary with **spatial proximity**, indicating a need for local engagement and the establishment of citizen and renewable energy communities. Optimizing **permitting processes** also contributes to local acceptance and reduces project delays.



**GreenMeUp – Green Biomethane Market Uptake** is a Horizon Europe project that aims at providing a basis for policy-makers and stakeholders to develop more informed renewable energy policies and country-tailored market uptake measures, in order to improve and complement existing biomethane policy in Europe.



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