ANAEROBIC DIGESTION & BIOGAS NEWS

The Weekly Digest

Issue #3 · 18–26 July 2026

ANAEROBIC DIGESTION & BIOGAS

AD World Update 26 July 2026

THE WEEKLY DIGEST

The Weekly Digest

Your weekly AD world update across the world of Anaerobic Digestion

ISSUE PERIOD
18–26 July 2026

EDITION
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SOURCES
70+ References

International + UK Policy Coverage

THIS ISSUE

CONTENTS THIS WEEK

EDITOR'S NOTE · ISSUE #3

A new PM, a new Energy Secretary, and a week that put over £400 million into the sector.

Welcome to Issue #3. This has been one of the most consequential weeks for the UK AD and biogas sector in recent memory, and not only because of the political transition. Andy Burnham became the UK's seventh Prime Minister in ten years on 20 July, and his appointment of Miatta Fahnbulleh as Energy Secretary signals a government that understands biomethane from the inside. Fahnbulleh was the keynote speaker when Future Biogas commissioned the UK's first unsubsidised biomethane plant with carbon capture: that context matters.

Beyond Westminster, the financial story is just as significant. EnviTec committed €100 million to a strategic biomethane pivot. Waga Energy signed a €128 million green loan. Fidra Energy closed £231 million for a 500MW battery project. Ireland disbursed its first €19 million of biomethane capital grants. This is not subsidy-driven momentum: it is commercial capital, moving because the fundamentals are sound.

The Editorial Team · The Weekly Digest · 18–26 July 2026

Share feedback or a story tip →

€228m+	68 GWh	64 TWh	$109B
BIOMETHANE CAPITAL COMMITTED THIS WEEK	VIDA WORMSLADE ANNUAL OUTPUT	UK BIOMETHANE REQUIREMENT BY 2050	GLOBAL BIOGAS MARKET FORECAST 2036

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PILLAR 01 · INTERNATIONAL FOCUS

Feedstock

ORGANIC WASTE SUPPLY, QUALITY & DIVERSIFICATION

> *A new biomethane plant goes live in Northamptonshire, the digestate framework heads into summer review, and EnviTec completes the first integrated biogas-plus-upgrading plant in Estonia. Three stories that together show the sector's full lifecycle from feedstock-in to biomethane-out.*

VIDA Bioenergy Wormslade Goes Live: 68 GWh from 46,000 Tonnes of Agricultural Feedstock

VIDA Bioenergy began commercial biomethane injection from its Wormslade facility in Kelmarsh, Northamptonshire, in July 2026, marking a significant milestone for both the operator and Cadent's East Midlands network. The plant is the 17th biomethane connection on that network and the 46th across Cadent's UK grid, reflecting the continued steady build-out of the UK's biomethane injection infrastructure.

Wormslade is designed to process approximately 46,000 tonnes of agricultural feedstock annually, producing around 68 GWh of renewable biomethane per year: enough to heat more than 5,000 homes. The facility also generates approximately 70,000 tonnes of nutrient-rich digestate, returned to local agriculture as organic fertiliser, completing a circular economy loop from farm to grid and back to field. Full operational capacity is expected by October 2026. The wider context is equally significant: Cadent's connected biomethane capacity has now reached approximately 4 TWh per year, and the network operator has set an ambition to reach 20 TWh by 2035, a fivefold increase that implies a substantial acceleration in the connection pipeline over the coming decade.

UK INFRASTRUCTURE · AGRICULTURAL AD · vidabioenergy.com · bioenergy-news.com · gasworld.com

Digestate Framework Review: ADBA Pushes for Statutory Biofertiliser Standard This Summer

The Environment Agency is scheduled to review the Anaerobic Digestate Resource Framework during summer 2026, and the industry has arrived at that review with a clear ask. The ADBA is lobbying for a statutory biofertiliser standard equivalent to the EU's Fertilising Products Regulation 2019/1009, a move that would give certified digestate the same legal standing as manufactured fertilisers, open retail channels, and remove some of the regulatory friction that currently constrains the digestate market.

Alongside that, operators are pressing for a resolution to what many describe as the NVZ problem: the Nitrate Vulnerable Zone spreading rules currently apply to processed digestate as if it were untreated slurry, ignoring the nitrogen stabilisation that occurs during anaerobic digestion and upgrading. The RB209 nutrient management framework is being interpreted as a fixed nitrogen ceiling rather than the guidance document it was designed to be, creating a situation where operators with high-quality, certified digestate face the same spreading restrictions as raw manure producers. Separately, the European Commission is examining new flexibilities for digestate under the Nitrates Directive, including potential adaptations to the 170 kg N per hectare per year ceiling for processed products. Any such flexibility agreed at EU level could create pressure for equivalent adjustments in UK post-Brexit regulation.

ADRF REVIEW · DIGESTATE · adbioresources.org · gov.uk

EnviTec Commissions First Integrated Biogas and Upgrading Plant in Estonia

EnviTec Biogas has commissioned its first combined biogas production and gas upgrading plant in Estonia, located in Halinga. The facility was delivered for customer Halinga OU in approximately one year from contract to commissioning, a timeline that reflects both the modular design advantages of integrated systems and EnviTec's growing execution capability in the Baltic market. The plant produces approximately 600 Nm^3 of biomethane per hour from a feedstock mix of manure and organic waste, and represents the fourth EnviThan gas upgrading installation in Estonia. With all of EnviTec's Estonian plants combined, the country now has access to approximately 199 GWh of biomethane per year available primarily for the transport sector, a meaningful contribution to Estonia's renewable gas infrastructure and a demonstration that smaller EU member states can build regionally significant biomethane supply chains relatively quickly when the regulatory and commercial conditions align.

ESTONIA INTEGRATED PLANT envitec-biogas.com renewableenergymagazine.com

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PILLAR 02 · INTERNATIONAL FOCUS

Technology

PROCESS INNOVATION, CARBON CAPTURE & GRID INTEGRATION

> *Four technology stories this week: the Environment Agency formalising CCUS-readiness in permitting, the world's first certified permanent carbon removal from a biogas plant, 100 MW of AI-driven battery storage going live in Scotland, and Germany accelerating grid connections for co-located storage.*

Environment Agency Consults on Making Decarbonisation Readiness Permanent in AD Permits

The Environment Agency is consulting on embedding Decarbonisation Readiness as a permanent requirement in standard AD environmental permits, building on the February 2026 changes that first introduced the concept. Under the proposed approach, new AD sites and substantially refurbished facilities would need to demonstrate at the permitting stage that their design accommodates future carbon capture, utilisation and storage retrofit: physical space allocation, process integration points, and a preliminary assessment of which CCUS pathway is most likely to be viable at the site.

The significance of this consultation extends well beyond permitting paperwork. If adopted as proposed, it would effectively integrate Bioenergy with Carbon Capture and Storage into mainstream AD policy for the first time, treating future carbon negativity as a design parameter rather than an optional upgrade. For operators planning new sites or significant refurbishments, the practical implication is that CCUS considerations should enter the engineering brief from day one, not be retrofitted at the planning appeal stage. For investors assessing long-term project value, it represents a regulatory pathway toward negative-emissions revenue streams that could substantially enhance project economics over a 20–25 year asset life.

EA CONSULTATION BECCS Environment Agency

World First: Puro.earth Certifies Permanent Carbon Removal from a Biogas Plant

Puro.earth has certified the first permanent carbon removal credit generated from a biogas facility, achieved at the VEAS wastewater treatment plant in Norway and developed by Inherit Carbon Solutions. The certification marks a commercial milestone for the BECCS pathway: biogenic CO_2 captured during biogas upgrading, rather than being vented, is permanently stored, generating a verified carbon removal credit that can be sold to organisations seeking high-integrity, durable carbon offsets.

The significance for the broader AD sector is considerable. Until now, biogas and biomethane projects have primarily generated avoided-emissions credits, which represent a lower tier of carbon market value than permanent removals. A certified permanent removal credit from a biogas process creates an entirely new revenue line for operators willing to invest in capture and storage infrastructure, and it validates the BECCS-from-wastewater pathway at commercial scale. The VEAS project will serve as a reference case for other operators in the UK and Europe now assessing whether CO_2 capture investment can be justified on carbon credit revenues alone, independent of biomethane or electricity income.

BECCS CARBON REMOVAL puro.earth biomassmagazine.com

Engie Commissions 100MW of AI-Driven Battery Storage in Scotland

Engie has commissioned two 50 MW battery energy storage sites at Cathkin and Broxburn in Scotland, bringing 100 MW of grid-balancing capacity online using AI-driven dispatch technology. While not AD-specific, this development is directly relevant to the sector: battery co-location with biogas and biomethane plants is an emerging strategy for operators seeking to maximise revenue by combining baseload biomethane injection with flexible electricity export during peak-price periods. The AI-driven balancing approach being used at Cathkin and Broxburn is also indicative of the direction of travel for grid services more broadly, where automated optimisation replaces manual dispatch decisions, reducing operational overhead while improving grid performance.

BATTERY STORAGE SCOTLAND solarpowerportal.co.uk

Westnetz Introduces Fast-Track Grid Connection for Co-Located Battery Storage

German distribution network operator Westnetz has introduced expedited connection agreements for battery storage systems co-located with existing generation assets, cutting the typical grid connection timeline significantly for qualifying projects. The policy is directly relevant to AD operators in Germany seeking to add battery co-location to existing biogas plants, and it establishes a precedent that UK distribution network operators may face pressure to follow, particularly in the context of the new first-ready, first-connected grid reform discussed in the Government section of this issue. For AD operators considering battery co-location as a revenue diversification strategy, the Westnetz model demonstrates that regulatory innovation at the DNO level can be as impactful as national policy change in unlocking storage investment.

GERMANY GRID CONNECTION essnews.com

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PILLAR 03 · INTERNATIONAL FOCUS

Design

PLANT CONSTRUCTION, POLICY DESIGN & ENGINEERING STRATEGY

> *France is broadening its renewable gas support to include pyrolysis and gasification, while the UK's tenfold growth target raises fundamental questions about what kinds of plants the sector needs to build, how fast, and from what feedstocks.*

France Proposes Pyrolysis and Gasification Support Under the Biogas Production Certificate Scheme

A French draft decree proposes extending the Certificats de Production de Biogaz scheme to include pyrolysis and gasification alongside the existing anaerobic digestion and landfill gas capture pathways. The CPB scheme currently supports biomethane producers through a certificate mechanism linked to gas grid injection; extending it to thermochemical pathways would recognise a broader set of renewable gas production routes, including those better suited to woody biomass, agricultural residues, and other feedstocks with lower biodegradability profiles that AD cannot efficiently process.

Canadian firm CHAR Technologies has welcomed the development in the context of its partnership with GazoTech, which is developing the Bio-Methane Provence project in Gardanne, southern France. That project is designed to process approximately 115,000 tonnes of recovered wood per year, producing 230 GWh of renewable natural gas and 12,000 tonnes of biocarbon, with commercial operations targeted for the second half of 2029. The French scheme, if extended as proposed, would run through 2041 with rising annual quotas, providing the long-term policy visibility that project finance lenders require. The broader implication for the European sector is that national support frameworks are beginning to evolve from single-technology designs toward multi-pathway models, acknowledging that no single conversion technology can address the full diversity of available feedstocks at the scale the 2030 and 2050 targets require.

FRANCE PYROLYSIS bioenergy-news.com

UK Tenfold Growth Target: What it Means for Plant Design, Feedstock Strategy, and the Sector's Reputation

The Parliamentary Office of Science and Technology briefing confirming the UK must scale grid-injected biomethane from 7 TWh to 64 TWh by 2050 is not simply a policy aspiration: it is a statement about the type, size, and number of plants the sector must build. To reach 64 TWh from the current base, the UK would need to approximately double its operating plant count every decade while simultaneously increasing average plant scale and improving conversion efficiency. The POST briefing identifies mandatory food waste collections under Simpler Recycling as the primary near-term feedstock enabler, alongside agricultural residues and energy crops for the longer term.

However, the briefing also brings two design-relevant challenges into sharp focus. The House of Lords Environment and Climate Change Committee has recommended mandatory fugitive methane leak assessments at all AD sites, a requirement that would add compliance cost but also provide operators with the performance data needed to justify their climate credentials to increasingly scrutinous corporate buyers. The StopTheBiomethaneRush coalition has raised concerns about incentive structures that could prioritise volume over environmental integrity, including feedstock sourcing decisions that trade carbon efficiency for gate-fee economics. For engineers and developers designing the next generation of UK AD plants, these signals point toward a future where methane integrity monitoring, transparent lifecycle emissions accounting, and feedstock provenance documentation are standard design requirements rather than voluntary additions.

POST BRIEFING UK GROWTH post.parliament.uk bioenergy-news.com

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PILLAR 04 · INTERNATIONAL FOCUS

Finance

INVESTMENT, DEAL FLOW & MARKET ECONOMICS

> *More than €228 million of biomethane-specific capital was committed in the week of 18–26 July alone. Add Ireland's first grant disbursements, the Zenith Italian acquisition, and the Fidra BESS close, and this is one of the most active single weeks in the sector's recent financial history.*

EnviTec Commits €100 Million to Strategic Biomethane Pivot Away from Electricity

EnviTec Biogas has announced a €100 million strategic commitment to expand biomethane production in Germany, with the explicit goal of transitioning away from electricity generation by 2031. The pivot reflects a structural shift that is playing out across European biogas markets: with merchant electricity prices volatile and Power Purchase Agreements increasingly competitive, many operators who built their initial businesses on biogas-to-power are now converting or expanding toward grid-injected biomethane, which offers more predictable long-term revenue through off-take agreements and certificate markets. For EnviTec, the €100 million commitment represents a significant capital allocation to retrofit and new-build biomethane capacity, and it sends a clear signal to the market about where the company's strategic value lies in the post-2030 period.

ENVITEC GERMANY envitec-biogas.com

Waga Energy Signs €128 Million Green Loan for European Biomethane Expansion

Waga Energy signed a €128 million structured green loan on 23 July 2026 with a consortium comprising Credit Agricole CIB, Societe Generale, BNP Paribas, ING Bank, and additional lenders. The 10-year facility is structured to refinance approximately 20 operational WAGABOX units across France and fund new construction in France, Spain, and Italy, supporting Waga's continued European expansion. The WAGABOX technology uses a proprietary combination of membrane filtration and cryogenic distillation to purify landfill gas to biomethane quality for grid injection.

The deal follows a US$180 million financing for Waga's US operations in November 2025 and a €100 million corporate loan in July 2024, demonstrating an ability to access capital across multiple markets and instruments. The green loan structure, with its environmental performance metrics, also reflects the growing sophistication of ESG-linked project finance in the biomethane sector, where lenders are increasingly willing to offer preferential terms to projects with verified emissions credentials. For the sector, the scale and structure of the Waga deal provides further evidence that landfill gas utilisation remains a highly bankable asset class even as the broader attention focuses on food waste and agricultural feedstock pathways.

WAGA ENERGY GREEN FINANCE gasworld.com tradingview.com

Ireland Issues First €19 Million of Biomethane Capital Grants to Seven Projects

Ireland has issued the first tranche of payments under the 2024 Biomethane Capital Grant Scheme, with €19 million disbursed across seven successful projects providing 20% CAPEX support up to a maximum of €5 million per project. The seven recipients are: Bia Energy in Dublin (€3.9m), Brookdale Biogas in Donegal (€3.0m), College Proteins in Meath (€2.4m), Evergreen Agricultural in Kildare (€5.0m), Glenmore Generation in Donegal (€0.8m), Lisheen Renewable Energy in Tipperary (€3.6m), and Rockbrook A.D. in Laois (€0.3m). Ireland's national target is 5.7 TWh of indigenously produced biomethane annually. The first tranche represents roughly 10% of that ambition. A second and substantially larger €200 million round, secured through the National Development Plan, is expected to open later in 2026.

IRELAND CAPITAL GRANTS agriland.ie gasworld.com

Fidra Energy Closes £231M for West Burton C; Zenith Energy Acquires Italian Biomethane Asset

Two further deals complete this week's finance picture. Fidra Energy has achieved financial close on £231 million for the West Burton C battery energy storage project: a 500 MW, 1.1 GWh facility involving the National Wealth Fund, one of the UK's largest BESS financial closes to date. The deal reflects growing institutional confidence in large-scale storage as a complement to renewable gas infrastructure. Separately, Zenith Energy has entered a binding agreement to acquire a fully permitted biomethane facility in Italy, with green project financing expected to close by Q3 2026. The Italian market continues to attract acquisition interest from international operators drawn by its mature tariff-backed revenue model and the commissioning pipeline generated by the June 2026 deadline under Italy's 15-year support scheme.

BESS ITALY ACQUISITION energyglobal.com tradingview.com

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PILLAR 05 · INTERNATIONAL FOCUS

Off-take

CFD, CERTIFICATES, LEVIES & REVENUE FRAMEWORKS

> *CfD Allocation Round 8 opens, the RTFO's double-awarding mechanism continues to favour waste-derived biomethane, the Generator Levy tightens on biogas-to-power operators, and the Peak Cluster CCS commitment signals where the UK's carbon infrastructure is heading.*

CfD Allocation Round 8 Opens: Wholesale CfD and New Offshore Wind Category

The UK government officially opened Contracts for Difference Allocation Round 8 on 20 July 2026. The round introduces a voluntary Wholesale CfD mechanism designed to decouple renewable electricity prices from the prevailing gas price, addressing a structural issue in the existing CfD framework where generators receive windfalls during high gas price periods but face clawback obligations during low-price spells. AR8 also introduces a new Other Deepwater Offshore Wind category, allows hybrid metering arrangements combining CfD assets with merchant capacity, and generally requires a Gate 2 connection agreement for eligibility.

For the AD and biomethane sector, the CfD round is relevant primarily to operators with significant biogas-to-power assets or those considering dual-revenue configurations. The Wholesale CfD option may be particularly attractive to operators who have previously been deterred by the clawback risk in high-price periods, and the hybrid metering allowance creates new flexibility for projects combining grid-connected generation with co-located storage or behind-the-meter demand. Operators should seek specialist advice on whether their project configurations qualify under the AR8 eligibility criteria before the application window closes.

CFD AR8 RENEWABLES gov.uk CfD cms.law

RTFO Dynamics: Double-Awarding Favours Waste Biomethane; UK ETS Evaluation Under Way

The Renewable Transport Fuel Obligation certificate market continues to be the most commercially significant off-take mechanism for waste-derived biomethane in the UK. Under the current framework, biomethane produced from qualifying waste feedstocks is eligible for double-awarding of RTFCs, a mechanism that significantly enhances revenue per unit compared to equivalent volumes from food or energy crop feedstocks. This double-awarding advantage, combined with a market-driven certificate price (subject to a buy-out price ceiling), makes waste-derived biomethane one of the most attractive revenue configurations currently available to UK AD operators.

However, the long-term picture is less certain. The industry is actively advocating for a price floor mechanism to provide revenue stability against certificate price volatility, and the UK Emissions Trading Scheme Authority is separately evaluating the potential inclusion of grid-injected biomethane within the UK ETS framework. If grid biomethane were to receive ETS carbon credit recognition in addition to RTFC income, it would substantially improve project economics and open a new category of institutional investor. Both developments remain under review for now, but operators planning projects with 15–20 year revenue horizons should model both the double-awarding benefit and the potential for future ETS integration when structuring their off-take strategy.

RTFO UK ETS anaerobic-digestion.com c-zeromarkets.com

Generator Levy Reaches 55%; UK Peak Cluster CCS Secures £59.6m

The Electricity Generator Levy increased to 55% as of 1 July 2026, applying to electricity revenues above the relevant benchmark price for generators including biogas-to-power operators. The levy was introduced to capture windfall profits during the energy price crisis and has been criticised by the renewables industry for creating a persistent disincentive to electricity generation investment in the UK. For biogas operators who derive significant revenue from power export, the 55% levy rate materially reduces the attractiveness of biogas-to-power relative to biomethane injection. Separately, the UK government has committed £59.6 million to the Peak Cluster carbon capture project, a pipeline infrastructure development designed to transport CO_2 from cement and lime facilities in the Peak District to depleted gas reservoirs off Barrow-in-Furness. The project targets more than three million tonnes of CO_2 per year and secures 2,000 manufacturing jobs. While not directly AD-related, the Peak Cluster commitment signals government seriousness about CO_2 transport infrastructure, which is a prerequisite for the BECCS business models that several AD operators are now evaluating.

GENERATOR LEVY CCS carbonherald.com osborne-clarke.com

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PILLAR 06 · UK FOCUS

Government

UK POLICY, PLANNING REFORM & GRID TRANSFORMATION

> *The most politically active week in the UK energy sector for years: a new Prime Minister, a new Energy Secretary with direct biomethane experience, planning fast-tracks for renewables, and a grid connection reform that could reshape the development pipeline.*

Fahnbulleh Appointed Energy Secretary: Biomethane Experience at the Top of UK Energy Policy

Miatta Fahnbulleh has been appointed Secretary of State for Energy following Andy Burnham's ascent to the office of Prime Minister on 20 July 2026. Burnham becomes the UK's seventh Prime Minister in ten years. Fahnbulleh, previously Parliamentary Under-Secretary of State for Energy under Ed Miliband, takes on the senior cabinet role with a notable piece of sector-specific history: she was the keynote speaker at the commissioning ceremony for Future Biogas's first unsubsidised biomethane plant with carbon capture, a milestone that demonstrated commercial viability without subsidy support.

Chris Huhne, Chair of the Anaerobic Digestion and Bioresources Association, described Fahnbulleh as an "economist interested in whole-system costs, familiar with biomethane from her previous junior ministerial role." The Future Energy Networks CEO welcomed the appointment, saying the industry looks forward to working constructively with the new Secretary of State. Fahnbulleh has been MP for Peckham since July 2024 and was previously Chief Executive of the New Economics Foundation, where she focused on inclusive green transition economics. The combination of her economic background and direct biomethane engagement makes this appointment one of the most sectorally relevant to the AD industry since the introduction of the Renewable Heat Incentive.

POLITICAL TRANSITION ENERGY SECRETARY gasworld.com

Planning Fast-Track for Solar and BESS NSIPs Removes Pre-Application Consultation Requirement

New planning rules published this week remove the mandatory pre-application consultation requirement for Nationally Significant Infrastructure Projects covering large-scale solar and battery energy storage, with the change expected to cut planning timelines by up to 12 months for qualifying projects. The reform is directly relevant to larger AD and biomethane developments that may fall within NSIP thresholds, and it aligns with the government's broader agenda to accelerate clean energy infrastructure through regulatory simplification rather than new subsidy. For developers who have been deterred by the cost and timeline of NSIP pre-application procedures, this change meaningfully improves project viability and early-stage economics.

PLANNING REFORM NSIPS pv-magazine.com

Grid Reform: First-Ready, First-Connected Replaces Queue-Based Connection Process

Implementation of the new grid connection process has officially replaced the previous first-come, first-served approach with a first-ready, first-connected model that prioritises construction-ready projects over those holding speculative queue positions. For the AD and biomethane sector, this is a double-edged development. Projects that are genuinely advanced, with land secured, planning consent obtained, and equipment ordered, will benefit from faster connection timelines. However, developers who have secured grid connection offers speculatively, relying on queue position rather than construction readiness, will face a more challenging environment. The reform is expected to significantly reduce the volume of zombie projects occupying connection capacity and to bring the actual grid connection timeline into better alignment with real project development milestones.

GRID REFORM CONNECTION QUEUE dpamagazine.co.uk

GB Energy Nuclear Megadeals: £360m Oversight Contract Awarded, £1.08bn in Tender

GB Energy Nuclear has awarded a £360 million oversight contract and has a further £1.08 billion delivery partner contract out for tender, signalling the scale of the government's nuclear infrastructure investment programme. While nuclear and AD are distinct sectors, the GB Energy nuclear programme is relevant context for the AD sector in two respects. First, the government's willingness to commit multi-billion-pound sums to long-dated energy infrastructure with 15–30 year payback periods is a positive signal for the institutional capital environment across all long-life clean energy assets, including biomethane. Second, the GB Energy platform itself, if extended to encompass biomethane in future, could provide the kind of government-backed off-take certainty that would unlock the next wave of large-scale AD investment in a post-GGSS policy environment.

GB ENERGY UK NUCLEAR nuclear-news.net

SOCIAL INTELLIGENCE

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SOCIAL MEDIA · 18–26 JULY 2026

Social Intelligence

KEY POSTS AND NEWSLETTERS FROM ACROSS THE AD AND BIOGAS COMMUNITY

> *From EU ETS biomethane funding proposals to a global market forecast exceeding USD 100 billion, the sector's online conversation this week reflects an industry taking stock of its own scale.*

EU POLICY

EU Commission Watch 21 Jul 2026

The European Commission has proposed broadening ETS revenues to support biomethane and low-carbon transport fuels, a development that could provide a second revenue channel for European AD operators beyond national support schemes. If adopted, ETS-linked biomethane support would represent one of the most significant structural changes to the European biomethane revenue landscape since the introduction of national tariff systems.

Source: QC Intel | EU ETS Reform Proposal

US MARKET

ESS News 22 Jul 2026

Solar and battery storage accounted for 91% of all new US grid capacity additions in Q1 2026. The scale of this shift is relevant context for UK and European AD operators: as the US generation mix decarbonises rapidly through solar and storage, the relative value of dispatchable clean gas, including biomethane, for firm baseload and seasonal storage applications, increases rather than decreases.

Source: ESS News | US Grid Capacity Data Q1 2026

MARKET FORECAST

Future Market Insights 18 Jul 2026

The global biogas market is projected to grow from USD 46.54 billion in 2025 to USD 109.62 billion by 2036, a compound annual growth rate of 8.1% over the decade. Brazil leads growth at 12.2% CAGR, reflecting the scale of its sugarcane and agricultural residue feedstock base. Europe and the UK remain the most policy-mature markets, but the capital story is increasingly global.

Source: prnewswire.com | Future Market Insights Biogas Forecast

SECTOR NEWSLETTER

We Are Biogas Weekly 25 Jul 2026

Alexandra Arndt’s PoweredUp newsletter continues to be one of the best-curated weekly roundups in the sector, covering biogas, biomethane, RNG, and AD headlines across Europe, the US, and beyond. Recent editions featured France’s biomethane moment, a US$14.9 billion landfill gas investment headline, a World Biogas Expo 2026 field report, and Ireland, Denmark, and India delivery coverage. Recommended reading alongside this digest.

Source: LinkedIn Newsletter | PoweredUp / We Are Biogas

POLITICAL TRANSITION

gasworld.com 21 Jul 2026

Industry reaction to Fahnbulleh’s appointment was notably positive, with Chris Huhne (ADBA Chair) describing her as "an economist interested in whole-system costs, familiar with biomethane from her previous junior ministerial role." The Future Energy Networks CEO added that the industry looks forward to "working constructively" with the new Secretary of State. The combination of economic analytical background and direct biomethane exposure at ministerial level is being read by many in the sector as an upgrade in policy engagement quality, not just a change of name at the top.

Source: gasworld.com | Fahnbulleh Appointment Coverage

ANALYSIS

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CROSS-CUTTING IMPLICATIONS

Trend Analysis

THREE DOMINANT FORCES SHAPING THE AD SECTOR THIS WEEK

Three distinct but interconnected themes define Issue #3: the investment signal sent by more than €228 million committed in a single week, the policy window that opens with a new government more familiar with biomethane than any of its predecessors, and the significance of France broadening its support to thermochemical pathways.

1

The Investment Signal: Commercial Capital, Not Subsidy Capital

The scale of investment committed in the week of 18–26 July is striking precisely because it is not subsidy-driven. EnviTec's €100 million strategic pivot, Waga Energy's €128 million green loan, Fidra's £231 million BESS close, and Ireland's €19 million grant disbursements all represent different types of capital: corporate strategic, structured debt, infrastructure equity, and government grant. The common thread is that all of them reflect confidence in the long-term commercial fundamentals of the sector, not just a response to short-term policy incentives. This is the investment signal the sector has been waiting for: evidence that biomethane and biogas infrastructure can attract patient capital on commercial merit, at scale, across multiple European markets simultaneously.

2

The Political Window: A Government That Knows the Sector From the Inside

The appointment of Miatta Fahnbulleh as Energy Secretary represents something genuinely unusual: a senior government minister who has direct, specific, personal exposure to biomethane at the operational level, as a keynote speaker at the UK's first unsubsidised biomethane plant with carbon capture. This is not simply a favourable political environment in the abstract: it is a specific person, with specific knowledge, in a position to make specific decisions about the post-GGSS policy framework, the RTFO review, the ADRF summer revision, and the UK's response to the POST briefing's tenfold growth requirement. The sector would be well-advised to engage proactively and substantively with the new Secretary of State and her team, bringing evidence, not just asks.

3

France Broadens the Pathway: From AD-Only to Multi-Technology Renewable Gas

The French proposal to extend CPB support to pyrolysis and gasification is a signal that national renewable gas frameworks are maturing from single-technology designs toward multi-pathway models. This is significant because it acknowledges a fundamental truth: not all biomass is digestible, and a sector that relies solely on AD cannot unlock the full potential of woody biomass, agricultural residues, and other cellulosic feedstocks. For the UK, which currently has no equivalent pyrolysis or gasification support mechanism within its gas sector policy framework, France's move creates a precedent and a competitive pressure. If the UK's biomethane target of 64 TWh by 2050 is to be reached, policymakers may need to follow France's lead and design a technology-neutral framework for renewable gas, rather than one that privileges AD alone.

EDITOR'S VIEW

CLOSING REFLECTION

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In Summary

THE WEEK'S THEMES IN CONTEXT

"More than €228 million into biomethane in one week, a new Energy Secretary who has stood at the commissioning of the UK's first unsubsidised plant with carbon capture, and France opening the door to thermochemical pathways. The sector is at an inflection point."

The week of 18–26 July 2026 was defined by convergence: political, financial, and technological forces arriving simultaneously in a way that creates genuine strategic opportunity for operators and investors who are positioned to act. The Fahnbulleh appointment is not just favourable optics: it is a specific opportunity to engage a decision-maker who understands the sector's technical realities and can translate them into policy design. The ADBA, ADBA members, and the broader industry should treat the next six months as the most important policy engagement window of this decade.

On the financial side, the week's deal flow confirms that biomethane has crossed the threshold from a policy-dependent asset class to a genuinely investable one. EnviTec's pivot away from electricity toward biomethane by 2031 is the clearest corporate-level statement yet that the long-term value in the European biogas sector lies in gas, not power. Waga's green loan structure, with its ESG performance metrics and 10-year tenor, demonstrates that specialist lenders are comfortable with the asset class at scale and duration.

The technology story from VIDA Wormslade going live to Puro.earth certifying the world's first permanent carbon removal from a biogas plant to the EA's CCUS-readiness consultation points in a consistent direction: the sector is building the infrastructure, the regulatory frameworks, and the financial instruments for a negative-emissions future, not just a low-carbon one. The gap between where the sector is today and where the POST briefing says it needs to be in 2050 is vast. But this week's evidence suggests the trajectory is right. The direction is set: the work now is execution at pace and scale.

The Weekly Digest

Your weekly AD world update across the world of Anaerobic Digestion | 18–26 July 2026 | Issue #3 | contact-us@tiftservices.co.uk

Feedstock | Technology | Design | Finance | Off-take | Government (UK) | TIFT A–Z Series

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