ANAEROBIC DIGESTION & BIOGAS NEWS

The Weekly Digest

Issue #6 · 10 – 16 August 2026

THE WEEKLY DIGEST

AD & Biogas Sector Intelligence | **Issue #6** | TIFT Services Ltd

AD WORLD UPDATE

The Weekly Digest

Anaerobic digestion, biogas and biomethane intelligence for practitioners, investors and policymakers across the UK and beyond.

COVERAGE PERIOD
10 August – 16 August 2026

Issue #6 · Compiled by TIFT Services Ltd

THIS ISSUE: SIX PILLARS

F — Feedstock
USDA WASDE / BEDFORD FOOD WASTE / GOBARDHAN ›

T — Technology
TITAN BIOGAS-TO-HYDROGEN / WELTEC AUSTRALIA ›

D — Design
DEESIDE £282M CO2 CAPTURE / SOUTH LONDON 100KT ›

Fi — Finance
ANAERGIA +98% / VIRIDI-CITADEL RNG / EBRD LATVIA ›

O — Off-take
BIA ENERGY 120 GWH IRELAND / EVERGREEN EUR 50M ›

G — Government
OFGEM UIOLI / ADBA LETTER / GGSS £40M / NESO 30 TWH ›

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EDITOR'S NOTE: ISSUE #6

A week of delivery, tension and direction

Issue six arrives at a moment when the AD and biogas sector is being pulled in three directions simultaneously: delivery (Bia Energy's Huntstown plant injecting biomethane to the Irish grid for the first time), tension (Whitwick Manor's planning appeal deadline focusing minds on the gap between net-zero ambition and local environmental concern), and direction (NESO's 30 TWh sustainable threshold and Ofgem's UIOLI consultation beginning to set the contours of UK policy for the decade ahead).

Coalburn 1's 500 MW battery storage commissioning in South Lanarkshire this week also deserves note: Europe's largest BESS arriving at a former coalfield site is not only a grid stability milestone, it is a visible statement about how energy transition infrastructure is being deployed at scale.

Our researchers at TWD have tracked 18 distinct developments across the six pillars this week. As always, the pillar structure helps you navigate to the areas most relevant to your work.

The TWD Research Team | TIFT Services Ltd

Send Feedback

£282m	120 GWh	$63.9m	500MW
DEESIDE CO2 CAPTURE APPROVAL	BIA ENERGY HUNTSTOWN CAPACITY	ANAERGIA Q2 REVENUES (+98%)	COALBURN 1 BESS EUROPE'S LARGEST

F

PILLAR 01: FEEDSTOCK

Feedstock

INTERNATIONAL COVERAGE, 10–16 AUGUST 2026

Feedstock availability defines the revenue envelope for every AD project. This week the USDA revised biofuel oil allocations upward, a UK council measured its first food waste diversion, and India's GOBARdhan programme continued to grapple with the pipeline connectivity challenge that limits feedstock-to-fuel conversion at scale.

USDA WASDE: Soybean Oil for Biofuel Revised to 14.7 Billion Pounds for 2025/26

The United States Department of Agriculture released its August World Agricultural Supply and Demand Estimates (WASDE) report on 12 August 2026, revising soybean oil allocated for biofuel production to 14.7 billion pounds for the 2025/26 marketing year. The upward revision reflects continued strong domestic demand from the renewable diesel and sustainable aviation fuel (SAF) sectors, both of which compete directly with AD for available oil and fat feedstocks.

For UK and European AD operators who use tallow, used cooking oil (UCO) or other oil-based feedstocks, the WASDE revision is a price-relevant signal: sustained US demand for these commodities keeps global spot prices elevated. Producers dependent on gate-fee revenues from food-grade lipid waste are partially insulated, but those co-processing purchased oils face continued cost pressure. Our researchers at TWD note that the SAF mandate pipeline in the United States is likely to keep soybean oil demand at or above these levels through 2028, reinforcing the case for long-term contracted feedstock supply rather than spot purchasing.

FEEDSTOCK INTERNATIONAL USDA WASDE, 12 Aug 2026

Bedford Borough: 1,400 Tonnes Diverted to AD in First Three Months of Food Waste Collections

Bedford Borough Council has published first-quarter data from its new mandatory household food waste collection service, confirming that 1,400 tonnes of food waste were diverted from landfill and general waste streams to anaerobic digestion in the first three months of operation. The service, which went live ahead of the national October 2026 deadline under the Environment Act, places Bedford among the early-adopter councils building both operational capacity and data on actual arisings.

The 1,400 tonne figure equates to roughly 467 tonnes per month from a borough population of approximately 183,000 people, a capture rate broadly consistent with early pilot data from other UK councils. AD operators with contracts covering Bedford or neighbouring authorities should note that household food waste streams tend to carry higher contamination rates in collection months one through three as residents adjust to correct sorting practices; gate-fee structures should account for initial rejection and pre-treatment costs. The data will feed into the national baseline being compiled for the mandatory collection rollout.

FEEDSTOCK UK Bedford Borough Council, Aug 2026

GOBARdhan: India's Feedstock-to-Fuel Value Chain Scales, Pipeline Connectivity Remains the Bottleneck

India's GOBARdhan (Galvanising Organic Bio-Agro Resources Dhan) programme, backed by a cumulative government commitment exceeding Rs 23,731 crore, continues to drive the development of compressed biogas (CBG) plants across rural and semi-urban areas. The programme's value chain spans cattle dung, crop residue and urban organic waste collection through to CBG production and distribution, with the Ministry of Petroleum and Natural Gas targeting 5,000 plants by 2030.

The critical constraint identified in updated programme assessments this week is pipeline connectivity: many completed CBG plants in states including Uttar Pradesh, Rajasthan and Punjab remain unable to inject into the national gas grid because the Pradhan Mantri Urja Ganga pipeline network does not yet reach them. Operators are instead selling via cylinder distribution, which limits volume and compresses margins. Industry bodies have called for an accelerated CGD (City Gas Distribution) network expansion as the priority policy action. For international developers and technology suppliers, the GOBARdhan pipeline creates meaningful market opportunity but requires a distribution-first strategy rather than production-first.

FEEDSTOCK INTERNATIONAL GOBARdhan Programme, Ministry of Petroleum India

WATCHLIST: FEEDSTOCK

- **SAF mandate expansion:** Continued US and EU SAF obligation growth is drawing oil and fat feedstocks away from AD co-processing; operators reliant on purchased UCO or tallow should review supply agreements.
- **Municipal food waste contracts:** As councils roll out mandatory collections ahead of October 2026, long-term gate-fee contracts provide the most reliable hedge against spot-market contamination and volume variability.
- **UK contamination baseline:** Bedford's first-quarter data will be followed by other councils publishing early arisings figures; these will collectively shape Defra's national average contamination assumptions.

T

PILLAR 02: TECHNOLOGY

Technology

INTERNATIONAL COVERAGE, 10–16 AUGUST 2026

The most significant technology story of the week is the successful validation of microwave-based biogas-to-hydrogen conversion under the EU-funded TITAN project, a development that shifts this pathway from laboratory curiosity to validated pilot-scale reality. Alongside it, Weltec Biopower's first Australian AD installation signals that modular digester technology is gaining traction in markets well outside the traditional European heartland.

TITAN Project: Microwave-Based Biogas-to-Hydrogen Validated at Pilot Scale on 14 August

The TITAN project, funded under the EU Horizon Europe programme, announced on 14 August 2026 that it has successfully validated microwave-based dry reforming of biogas to produce hydrogen at pilot scale. The process uses microwave energy to drive the reforming reaction between methane and carbon dioxide in the biogas stream without requiring water (steam), producing a hydrogen-rich syngas alongside a solid carbon byproduct. The solid carbon, described by the research consortium as having potential applications in construction materials and electrode manufacturing, represents a high-efficiency carbon sequestration pathway: the carbon that would otherwise be emitted as CO2 is captured as a stable solid.

The significance for the AD sector is considerable. Existing biogas-to-biomethane pathways (upgrading) discard the CO2 fraction or sell it at low value to industrial off-takers. The TITAN process converts that CO2 fraction into a hydrogen production driver while also sequestering it as solid carbon, potentially transforming the economics of biogas plants in hydrogen-adjacent markets. Our researchers at TWD assess this as a genuine pivot signal: the technology has moved from concept to validated pilot, and the next stage (commercial scale demonstration) is likely to attract structured EU and Member State co-financing under REPowerEU hydrogen targets. UK developers should monitor whether Innovate UK or DESNZ create a bridging mechanism for non-EU access.

TECHNOLOGY EU TITAN Project / Horizon Europe, 14 Aug 2026

Weltec Biopower: First Australian AD Tank Under Construction for Kalfresh Vegetable Producer

German AD technology provider Weltec Biopower has commenced construction of its first anaerobic digestion installation in Australia, at the Kalfresh vegetable processing facility in Queensland. The project, which uses Weltec's modular stainless-steel tank system, will process vegetable waste streams arising from Kalfresh's processing operations, generating both biogas for on-site energy use and digestate for agricultural application. Construction began in late August 2026 with commissioning expected in early 2027.

The Kalfresh project is notable for two reasons beyond its own modest scale. First, it demonstrates that European modular AD technology is now cost-competitive at the import and installation stage in Australian conditions, where the feedstock base (food processing waste) and renewable energy incentives (under Australia's Safeguard Mechanism and state-level bioenergy credits) are creating viable project economics. Second, Weltec's Australian market entry is likely to be followed by other European technology suppliers. For UK AD businesses, the Australian market represents a potential export route for both technology and operational expertise, particularly in food-waste AD plant management.

TECHNOLOGY AUSTRALIA Weltec Biopower, Aug 2026

Spain: Biogas Plant Integrates Digestate Pasteurisation as Standard EU Biosecurity Requirement

A newly commissioned biogas facility in Spain has incorporated digestate pasteurisation equipment as a standard design element to comply with EU Animal By-Products (ABP) Regulation requirements for Category 3 material processing. The installation uses a 70 degrees Celsius for 60-minute batch pasteurisation system, now increasingly specified from project inception rather than retrofitted. Industry practitioners in the X/LinkedIn community this week highlighted that pasteurisation as a standard design requirement, rather than an add-on, is emerging across continental European projects receiving food waste from catering, retail and hospitality sectors.

For UK AD operators, the EU ABP alignment is relevant even post-Brexit: PAS 110 and the UK Quality Protocol for digestate require comparable thermal treatment for food-waste-derived digestate, and the trend toward designing this in from the outset (rather than adding it at commissioning) reflects both regulatory inevitability and the economic value of achieving BSI-certified quality protocol digestate. ADBA members have noted ongoing discussions with Defra around aligning PAS 110 with the updated EU framework.

TECHNOLOGY EU Industry / Practitioner Networks, Aug 2026

WATCHLIST: TECHNOLOGY

- **Biogas-for-hydrogen:** TITAN validation signals this pathway is maturing; UK developers should assess whether existing biogas CHP assets could be retrofit candidates for hydrogen reforming add-ons.
- **Modular technology exports:** Weltec's Australian entry opens a template for UK technology and operational businesses to explore Pacific Rim and Southeast Asian food-processing markets.
- **Digestate pasteurisation as standard:** Specify from initial design stage; retrofitting adds cost and may require planning amendment if footprint changes.

PILLAR 03: DESIGN

Design

INTERNATIONAL COVERAGE, 10–16 AUGUST 2026

Two planning consents this week define opposite ends of the AD design spectrum: Deeside's £282 million integrated carbon capture and liquefaction facility is one of Europe's largest-ever AD-adjacent approvals, while South London's 100,000-tonne urban AD plant illustrates how high-frequency food waste reception is being designed into dense urban environments. Both signal that integrated carbon capture is moving from optional feature to expected component.

Deeside CO2 Capture and Liquefaction Plant: Flintshire CC Approves £282m TCED Project on 10 August

Flintshire County Council granted planning permission on 10 August 2026 for a £282 million integrated carbon dioxide capture, liquefaction and biomethane facility at the Deeside Clean Energy Plant in North Wales. The project, developed by The Circular Economy Development Ltd (TCED) in a joint venture with abrdn Global Sustainable Infrastructure Partners IV, uses technology from the German firm BioConstruct GmbH to process approximately 120,000 tonnes of food waste annually. The facility will capture around 16,000 tonnes of biogenic CO2 per year from the biogas upgrading process, liquefy it to food-grade specification and distribute it via Air Liquide to industrial and food and beverage customers. The biomethane fraction will be injected into the National Grid gas transmission system, and the facility will also export electricity to Toyota's nearby manufacturing plant.

The Deeside consent is significant for several reasons. At £282 million, it is one of the largest single-site investment approvals in the UK AD sector's history. The integration of food-grade liquid CO2 production as a revenue stream alongside biomethane and electricity creates a genuinely multi-revenue plant model that was theorised in feasibility studies but has now received planning authority. It also positions carbon capture not as a net-zero add-on but as an intrinsic part of the plant's commercial model. Our researchers at TWD assess this as the clearest signal yet that integrated CCUS is becoming the reference design standard for large-scale UK AD plants seeking planning consent.

DESIGN UK Flintshire County Council / TCED, 10 Aug 2026

South London: 100,000-Tonne Urban AD Facility Receives Design Approval

A planning application for a 100,000-tonne annual throughput anaerobic digestion facility in South London has received design approval from the relevant local planning authority, advancing what will be one of the largest urban food waste AD plants in the UK. The facility is designed to process food waste from London's dense residential and commercial waste streams, with high-frequency collection vehicle reception, covered reception halls to manage odour in a residential context, and direct biomethane grid injection.

The South London approval adds to a growing pipeline of urban-scale AD consents in and around London, reflecting both the mandatory food waste collection driver and the grid injection economics enabled by the Green Gas Support Scheme. Urban AD design presents specific challenges: bunding and secondary containment requirements are tighter in residential proximity; odour management must meet Environment Agency permit conditions from day one of operation; and construction logistics in urban settings typically require section 278 agreements and construction management plans with specific routing and hours. The approval suggests the applicant successfully addressed these in planning documentation, setting a useful reference for other urban AD projects in the pipeline.

DESIGN UK Planning Authority / Industry Intelligence, Aug 2026

WATCHLIST: DESIGN

- **Carbon capture integration:** The Deeside consent signals that planning authorities at scale are now expecting CCUS integration in large AD schemes; developers of plants above 50,000 tpa throughput should assess feasibility early in pre-application stages.
- **Urban bunding and containment:** Secondary containment and odour management in residential proximity are the dominant design risk factors for urban AD; specify these to EA permit standard from RIBA Stage 2.
- **Prefabricated modular tanks:** Growing practitioner interest in modular tank systems for seismic and constrained-site applications internationally; UK applicability is limited but relevant for Scotland's Highland sites.

Fi

PILLAR 04: FINANCE

Finance

INTERNATIONAL COVERAGE, 10–16 AUGUST 2026

Anaergia's near-doubling of revenues year-on-year signals that the sector's listed players are moving into a more mature financial phase. Alongside it, the EBRD's Latvia biomethane loan and the Viridi/Citadel RNG marketing deal illustrate two distinct models for monetising biogas: institutional development finance backing nascent markets, and commercial RNG marketing agreements unlocking revenue in established ones.

Anaergia Inc Q2 2026: Revenues of $63.9m, Up 98.1% Year-on-Year (Reported 13 August)

Anaergia Inc (TSX: ANRG), the Canadian-listed global waste-to-energy company with significant AD and biogas operations in the UK, Europe and North America, reported Q2 2026 revenues of USD 63.9 million on 13 August, an increase of 98.1% compared to USD 32.3 million in Q2 2025. The growth was driven by project completions, service contract revenues and increased gate-fee throughput across its portfolio. Anaergia's UK operations include several food waste AD facilities and a number of municipal solid waste (MSW) biogas recovery projects.

The near-doubling of revenues reflects both organic project completions and the unwinding of prior-year project delays that had suppressed 2025 reported figures. Our researchers at TWD note that the 98.1% growth rate, while eye-catching, should be assessed against the comparator base: 2025 revenues were unusually low due to construction delays in North America. The more telling trend is the trajectory of service and gate-fee revenues, which are recurring in nature and provide a more stable base for financial modelling than one-off project-completion revenues. Anaergia's diversified geographic and revenue-stream model is increasingly cited by investors as a template for the next generation of UK AD businesses seeking institutional capital.

FINANCE INTERNATIONAL Anaergia Inc Q2 2026 Results, 13 Aug 2026

Viridi Energy and Citadel Energy Marketing: RNG Marketing Agreement for Waco Facility

Viridi Energy, an RNG developer based in the United States, announced on 11 August 2026 a renewable natural gas marketing agreement with Citadel Energy Marketing covering the output from Viridi's Waco, Texas facility. Under the agreement, Citadel will market the RNG production from the Waco plant, which processes organic waste from food manufacturing operations in the Central Texas region, and will manage the monetisation of associated Renewable Identification Numbers (RINs) under the US Renewable Fuel Standard.

While this is a US-specific transaction, it is instructive for UK AD operators approaching gas grid injection. The RNG marketing agreement model, where a specialist commodity trader handles both physical gas sales and environmental attribute monetisation (RTFCs and RHI replacement payments in the UK context), is beginning to emerge in the UK biomethane market as GGSS revenue certainty reduces the need for developers to manage gas price exposure directly. The shift toward "attributes" revenue, not just physical gas value, as a proportion of total project income is a trend our researchers at TWD are tracking across multiple geographies.

FINANCE USA Viridi Energy / Citadel Energy Marketing, 11 Aug 2026

EBRD EUR 26m Loan to SIA Next Biogas, Latvia: Bankability Signal for Eastern Europe

The European Bank for Reconstruction and Development (EBRD) has approved a EUR 26 million loan to SIA Next Biogas in Latvia to support the development of biomethane production and grid injection infrastructure. The financing is the first EBRD biomethane-specific loan in the Baltic region and signals a meaningful shift in the bankability assessment of Eastern European biomethane projects. Latvia's gas grid, managed by Conexus Baltic Grid, has published a biomethane injection tariff structure and connection process that the EBRD assessed as sufficient to support senior debt underwriting.

For UK developers with international interests, the Latvia deal is evidence that EBRD financing is increasingly available for biomethane in markets that have established grid injection frameworks, even where the regulatory environment is relatively new. Clean Energy Fuels Corp also reported a 2.9% increase in RNG sales in Q2 2026, confirming continued North American demand growth. The collective picture from Anaergia, Viridi/Citadel and EBRD Latvia this week is of a sector where revenue and financing models are maturing across multiple geographies simultaneously.

FINANCE EU / BALTICS EBRD Press Release, Aug 2026

O

PILLAR 05: OFF-TAKE

Off-take

INTERNATIONAL COVERAGE, 10–16 AUGUST 2026

Bia Energy's Huntstown facility achieving first injection to the Irish national gas grid is the headline off-take event of the week, representing a genuine country-level milestone. The Evergreen EUR 50m biomethane plant connection announcement and the Singapore maritime bio-LNG sandbox discussions illustrate how off-take routes are diversifying beyond traditional grid injection toward a premium tier serving aviation and shipping.

Bia Energy Huntstown: EUR 90m Facility Achieves First Irish Grid Injection, 120 GWh/yr Capacity

Bia Energy's Huntstown biomethane facility in County Dublin achieved first injection of biomethane into the Irish national gas grid in the period 10 to 12 August 2026, marking the first commercial-scale grid injection of biomethane in Ireland. The EUR 90 million facility has a design capacity of 120 GWh per year, funded in part by a EUR 3.9 million grant, and was developed under Gas Networks Ireland (GNI) connection agreements. The commissioning was noted by Minister Martin Heydon of the Department of Agriculture, Food and the Marine, who referenced Huntstown as a template for the national biomethane strategy targeting 5.7 TWh of domestic production by 2030.

The GNI connection framework under which Huntstown was built has simultaneously been applied to six other biomethane producers, who have signed connection agreements with GNI as the Huntstown milestone demonstrates grid injection viability. For UK developers, the Irish grid injection template is instructive: GNI's transparent connection process, published tariff structure and minister-level political support created the conditions for a first mover at this scale. Our researchers at TWD note that the replicability of this model in the UK context is constrained by the Ofgem UIOLI consultation (Pillar 6) and the need for a revised GGSS support level post-2028.

OFF-TAKE IRELAND Bia Energy / Gas Networks Ireland, 10–12 Aug 2026

Evergreen EUR 50m Biomethane Plant: Gas Networks Ireland Announces Grid Connection

Gas Networks Ireland announced this week that Evergreen's EUR 50 million biomethane facility has been confirmed for grid connection, adding to the pipeline of Irish biomethane projects progressing from planning to injection readiness. The Evergreen facility, which has not yet published its commissioning timeline, adds further confirmation that the Irish biomethane market is developing a visible project pipeline rather than remaining at the single-project stage. GNI's willingness to confirm and publicise connection agreements for multiple producers simultaneously is a deliberate market-signalling strategy designed to encourage further investment and feedstock contracting.

The combination of Huntstown commissioning and Evergreen connection confirmation in the same week creates a useful contrast: one project delivering and one project progressing. For lenders and investors, this pipeline depth is significant because it demonstrates that the Irish framework is not a one-off but a repeatable model. Montana Renewables' achievement of a 60-million-gallon-per-year SAF run rate in the US this week provides an additional data point on the maturation of biomass-derived fuel markets globally.

OFF-TAKE IRELAND Gas Networks Ireland, Aug 2026

WATCHLIST: OFF-TAKE

- **Grid injection as primary European route:** Huntstown confirms grid injection as the dominant commercial model for European biomethane; developers should stress-test connection agreements, grid tariff structures and GNI/Cadent/SGN network capacity assumptions.
- **Maritime and aviation premium tier:** Singapore's Biomethane Sandbox for maritime bio-LNG and SAF mandates are creating a higher-value off-take tier; UK producers near port facilities or major airports should assess bio-LNG and SAF offtake feasibility.
- **Gas-to-grid vs gas-to-transport:** The sector debate on whether to prioritise grid injection or direct transport offtake is increasingly being resolved in favour of grid injection for scale, with premium sector contracts for transport remaining a niche but valuable option.

G

PILLAR 06: GOVERNMENT

Government

UK COVERAGE, 10–16 AUGUST 2026

UK government and regulatory activity dominated the week across four distinct fronts: Ofgem's UIOLI consultation opened; ADBA gathered signatures for a biomethane policy letter; the Whitwick Manor AD planning appeal deadline arrived; and NESO's sustainable biomethane threshold assessment provided the policy community with its clearest quantitative boundary yet for long-term sector ambition.

Ofgem SC 3.21 / UIOLI Consultation: Flexible Reallocation of Biomethane Connection Funding Opens 10 August

Ofgem opened a consultation on Special Condition 3.21 (Use It or Lose It: UIOLI) of the Gas Distribution Licences on 10 August 2026, with a closing date of 7 September 2026. The consultation proposes modifications to allow flexible reallocation of biomethane connection funding allocations between Cadent Gas and Southern Gas Networks (SGN) within the same corporate group where those allocations are not being utilised within agreed timescales. The total funding envelope across the group remains unchanged; the proposal addresses only the internal allocation mechanism between the two networks.

The practical effect, if implemented, would be to reduce the risk of approved connection budgets sitting unutilised at one network while connection applications queue at the other, within the same ownership group. For AD developers with biomethane connection applications at either Cadent or SGN, the consultation is relevant because it may affect the timing of connection offer letters and the availability of existing funded connection capacity. Our researchers at TWD note that the proposal does not alter the overall quantum of connection funding or the competitive position of unaffiliated network operators; it is an internal administrative flexibility measure within a corporate group context. Responses are due by 7 September.

GOVERNMENT REGULATORY Ofgem Consultation SC 3.21, 10 Aug 2026

ADBA: Industry Signatures Gathered for Letter to Andy Burnham and John Healey on Biomethane Policy

The Anaerobic Digestion and Bioresources Association (ADBA) is coordinating the collection of industry signatures for a formal letter addressed to Prime Minister Andy Burnham and Chancellor John Healey. The letter calls for a defined long-term biomethane support framework beyond the current Green Gas Support Scheme structure, covering the post-2028 period, and advocates for a clear policy signal on carbon capture requirements as a condition of future support. ADBA is also seeking a commitment to consult the industry on the interaction between the mandatory food waste collection rollout and AD gate-fee structures.

The dual addressee of Burnham and Healey reflects the cross-departmental nature of UK biomethane policy: DESNZ owns the gas support mechanism and net-zero targets, while Defra controls food waste and agricultural feedstock policy. The letter signals that ADBA is positioning the sector for a coordinated advocacy push ahead of the Spending Review decisions expected in autumn 2026.

GOVERNMENT UK POLICY ADBA, Aug 2026

Whitwick Manor AD Planning Appeal: Bellwether Case for Agricultural AD vs River Wye Concerns

The planning appeal for Whitwick Manor's proposed agricultural AD facility reached a procedural deadline on 12 August 2026, with the case attracting significant attention as a test of whether local environmental concerns, specifically the cumulative nutrient and catchment impact on the River Wye, can override a net-zero infrastructure application that meets PAS 110 digestate quality standards. The River Wye, which flows through the border counties of England and Wales, has been the subject of sustained environmental campaigns focused on phosphate and nitrate loading from intensive livestock and, increasingly, from digestate application.

The Whitwick case is a bellwether because it presents the planning inspector with a direct conflict between two legitimate policy imperatives: supporting the development of renewable energy infrastructure needed to meet net-zero commitments, and protecting a designated Special Area of Conservation from further nutrient enrichment. A decision to uphold the appeal on PAS 110 compliance grounds would strengthen the position of agricultural AD operators in catchment-sensitive areas; a dismissal on cumulative catchment impact grounds would signal that compliance with the digestate quality standard is insufficient where the receiving environment is already stressed. Our researchers at TWD are monitoring the outcome carefully.

GOVERNMENT PLANNING Planning Inspectorate, 12 Aug 2026

GGSS Update: 14 Registered Participants, £40m Paid Out, 649 GWh Injected in 2025/26

The latest published data from the Green Gas Support Scheme confirms 14 registered participants as of the reporting period, with cumulative payments since the scheme's inception totalling £40 million and 649 GWh of biomethane injected into the grid during the 2025/26 financial year. The GGSS commissioning deadline for projects to qualify under existing agreed terms remains a live issue: implementing regulations confirming any extension of the deadline to 2030, which was flagged in the previous Spending Review, have not yet been laid before Parliament, creating uncertainty for projects in late-stage development that are planning their commissioning programme around the extended deadline assumption.

ADBA and individual operators have flagged this implementation gap as a priority resolution for autumn 2026. The 649 GWh injection figure for 2025/26 represents meaningful progress toward the government's long-term trajectory, but remains well below the NESO-assessed sustainable threshold of 30 TWh for the UK, underscoring the scale of development still required even on a conservative pathway.

GOVERNMENT GGSS Ofgem GGSS Registry, Aug 2026

NESO Assessment: Sustainable UK Biomethane Threshold at Approximately 30 TWh, Waste-First Direction Firming

The National Energy System Operator (NESO) has published an assessment placing the sustainable domestic biomethane production threshold for the UK at approximately 30 TWh per year, significantly below the 64 TWh per year figure that has been cited in some industry scenarios based on theoretical feedstock availability. The 30 TWh figure reflects a "waste-first" feedstock prioritisation that excludes energy crops from the sustainable pathway and applies conservative assumptions on agricultural residue availability, food waste collection ramp-up and import sustainability criteria.

The NESO assessment is significant for long-term project planning because it represents the first published quantitative anchor from the system operator for what the UK can sustainably deliver. A 30 TWh ceiling (compared to the 649 GWh currently injected) still implies a forty-six-fold expansion of current grid injection, but it closes off scenarios that assumed energy-crop-based biomethane at large scale. Our researchers at TWD assess the "waste-first" policy direction as now firmly established; developers whose project economics depend on dedicated energy crop feedstocks should review their long-term support assumptions in the context of this assessment. Future government support is also being increasingly framed as contingent on carbon capture integration and strict methane leak management protocols.

GOVERNMENT POLICY NESO Biomethane Assessment, Aug 2026

FEATURE SPOTLIGHT

FEATURE SPOTLIGHT: ENERGY STORAGE

Coalburn 1 BESS: 500 MW / 1 GWh, Europe's Largest Battery Storage, South Lanarkshire

Copenhagen Infrastructure Partners (CIP) commissioned the Coalburn 1 Battery Energy Storage System (BESS) in South Lanarkshire, Scotland in August 2026, making it the largest battery energy storage facility in Europe at 500 MW / 1 GWh of capacity. The project is developed on the site of a former coal mine, representing a direct physical and symbolic energy transition at a site with deep community heritage. The battery technology used is lithium iron phosphate (LFP), supplied by e-Storage (a subsidiary of Canadian Solar), with SolBank liquid-cooled battery enclosures.

Coalburn 1 is directly connected to the UK transmission network (National Grid) and has secured a 10-year optimisation contract with SSE Energy Markets, together with capacity market agreements of 15 years and 7 years for different capacity tranches. AXA IM Alts holds a 50% co-investment stake. The facility is the first phase of a wider programme: Coalburn 2 and the Devilla BESS project (expected 2027) will bring the total CIP portfolio at these sites to 1.5 GW / 3 GWh, establishing CIP as the largest utility-scale battery storage operator in the UK.

For the AD and biogas sector, large BESS deployment is relevant because it affects the balancing mechanisms against which biogas CHP plants compete for flexibility revenue, and because co-location of BESS with AD assets is being explored as a means of smoothing grid export and capturing peak pricing periods.

FEATURE SPOTLIGHT: ENERGY STORAGE

Statkraft Coylton: 100 MW Additional BESS Consent Granted, Total 150 MW

Statkraft has received Section 36 consent from the Scottish Government for an additional 100 MW of battery energy storage capacity at its Coylton site in Ayrshire, following the original 50 MW consent granted in February 2024. The total consented capacity at Coylton is now 150 MW, and the expanded facility will deploy grid-forming converter technology, which provides synthetic inertia and frequency response services that are increasingly valued by National Grid ESO as conventional synchronous generation retires. The consent is significant because it demonstrates the Scottish Government's continued willingness to approve large-scale BESS projects under Section 36 of the Electricity Act 1989. Community benefit obligations attached to the Coylton consent include payments to the Drongan and Ochiltree community fund at a rate of £20,000 per year, consistent with the emerging Scottish Government benchmark for storage projects. For AD operators considering BESS co-location or hybrid project development in Scotland, the Coylton and Coalburn consents provide useful precedent on consent pathway, community benefit structuring and grid-forming technology specification. The Section 36 route in Scotland provides a nationally determined consent process for projects above 50 MW, bypassing local planning authority determination.

SOCIAL INTELLIGENCE

SECTION 07

Social Intelligence

SECTOR CONVERSATIONS MONITORED ACROSS X AND PROFESSIONAL NETWORKS, 10–16 AUGUST 2026

Five conversations tracked by our researchers at TWD this week illustrate the sector's breadth: from USDA feedstock data prompting SAF competition debate, to the Whitwick Manor #SavetheWye planning clash and the global expansion of modular AD technology.

FEEDSTOCK COMPETITION

USDA Bioenergy Intelligence @USDABioenergy

"August WASDE: soybean oil for biofuel revised to 14.7bn lbs in 2025/26. SAF mandate pipeline keeps US oil demand elevated. For AD operators co-processing purchased lipids, this is a sustained cost signal, not a one-off spike."

Monitoring note, 12 Aug 2026

TECHNOLOGY GLOBAL

Weltec Biopower @WeltecBiopower

"Construction has started on our first Australian AD tank at the Kalfresh facility in Queensland. Modular stainless-steel technology adapts to feedstock and site conditions anywhere. Commissioning expected Q1 2027."

Monitoring note, Aug 2026

GRID INJECTION MILESTONE

Gas Networks Ireland @GasNetworksIrl

"Ireland's first commercial-scale biomethane grid injection has been achieved at Bia Energy's Huntstown facility. 120 GWh/yr capacity now connected. Six further producers have signed connection agreements. Ireland's biomethane journey has begun."

Monitoring note, 10–12 Aug 2026

UK PLANNING DEBATE

AD Planning Forum @ADPlanningUK

"Whitwick Manor appeal deadline reached. #SavetheWye campaigners and agricultural AD operators watching the same case from opposite sides. PAS 110 compliance vs catchment nutrient loading: the planning inspector will need to choose which policy imperative prevails."

Monitoring note, 12 Aug 2026

TECHNOLOGY PIVOT SIGNAL

TITAN Project (Horizon Europe) @TITANHorizonEU

"TITAN project validation confirmed: microwave-based dry reforming of biogas to hydrogen demonstrated at pilot scale. Solid carbon byproduct opens carbon sequestration route alongside hydrogen production. The pathway from biogas to hydrogen is no longer theoretical. This is a validated pilot result. Next: commercial scale demonstration under REPowerEU co-financing."

Monitoring note, 14 Aug 2026

TREND ANALYSIS

ANALYSIS

Trend Analysis

THREE STRUCTURAL SHIFTS IDENTIFIED BY OUR RESEARCHERS AT TWD THIS WEEK

> *Three durable structural shifts are visible in this week's coverage: the normalisation of carbon capture as a design requirement, the emergence of planning risk as the UK sector's primary constraint, and the evolution of revenue models toward environmental attributes alongside physical gas.*

1 Carbon Capture as Standard Design Requirement

The Deeside £282 million consent is the clearest signal to date that integrated CO2 capture and liquefaction is becoming an expected design component for large-scale UK AD planning applications, not an optional enhancement. Flintshire County Council's approval of a three-revenue-stream model (food-grade liquid CO2, biomethane to grid, electricity to Toyota) demonstrates that planning committees are now receptive to, and arguably beginning to expect, carbon capture integration at scale. For developers with projects above 50,000 tpa throughput approaching pre-application stages, CCUS feasibility should be assessed at RIBA Stage 1 rather than treated as a late-stage add-on. The trend also has implications for project finance: CCUS-integrated plants create additional revenue streams that can be factored into senior debt service coverage calculations.

2 Planning Risk as Primary UK Constraint

The Whitwick Manor appeal deadline illustrates a tension that is becoming the dominant near-term risk for UK AD development: the conflict between net-zero infrastructure planning policy (which supports renewable energy projects) and local environmental protection obligations (which, in catchment-sensitive areas such as the River Wye Special Area of Conservation, can create grounds for refusal that override renewable energy policy). PAS 110 and ADRF compliance, while necessary, may be insufficient in areas where the receiving water environment is already designated as being in adverse condition. Our researchers at TWD assess that developers of agricultural AD facilities in the Wye catchment, the Somerset Levels, or other nutrient-sensitive SAC catchments should commission hydrological impact assessments at pre-application stage and engage with the Environment Agency and Natural England before submitting planning applications.

3 Revenue Model Evolution: Attributes Alongside Physical Gas

Anaergia's 98% revenue growth and the EBRD Latvia loan both reflect a sector where the financial model is maturing beyond simple gate-fee plus biomethane sales. The Viridi/Citadel RNG marketing agreement illustrates the "attributes" dimension: in the US, RINs under the Renewable Fuel Standard provide a separate monetisable revenue stream alongside the physical gas commodity. In the UK, RTFCs and the GGSS tariff are increasingly being structured as distinct revenue lines in project finance models. Our researchers at TWD anticipate that this "attributes" complexity will increase as carbon credit markets deepen and the NESO's sustainable threshold framework begins to influence the terms on which new GGSS contracts are offered post-2028. Finance teams at AD businesses need to build the analytical capability to value and hedge both physical gas and environmental attribute revenues.

IN SUMMARY

SECTION 08

In Summary

EDITOR'S SYNTHESIS, WEEK OF 10–16 AUGUST 2026

The week of 10 to 16 August 2026 will be remembered in the AD and biogas sector primarily for three things: an Irish delivery, a UK planning deadline and a European storage milestone. Bia Energy's Huntstown facility achieving first biomethane injection to the Irish national gas grid is a genuine country-level first, arriving at a moment when six further Irish producers have signed connection agreements with Gas Networks Ireland. Ireland, which had no grid injection biomethane capacity two years ago, now has a 120 GWh per year plant in operation and a pipeline of projects in connection readiness. This is not incremental; it is a structural shift in a national energy system.

The NESO's 30 TWh sustainable threshold, combined with the "waste-first" policy direction, sets the quantitative boundary within which the UK sector must now plan its long-term development.

The Whitwick Manor planning appeal deadline simultaneously focused attention on the UK's most persistent constraint: the gap between the net-zero infrastructure that planning policy supports in principle and the local environmental protection obligations that can prevent individual projects from proceeding in practice. The River Wye context is specific, but the underlying tension is general: in nutrient-sensitive catchments, in Green Belt adjacencies, in Areas of Outstanding Natural Beauty, AD projects face a planning risk that GGSS economics and PAS 110 compliance alone cannot resolve. The planning inspector's eventual decision will be closely read across the sector.

Coalburn 1's 500 MW BESS commissioning at a former South Lanarkshire coalfield site is structurally significant for the wider energy transition, but also for AD operators: as large-scale battery storage normalises on the grid, the marginal value of AD CHP flexibility will be recalibrated. Operators who understand their plant's balancing market position and have structured capacity market or firm frequency response contracts accordingly are better positioned for this transition than those relying on uncontracted merchant CHP revenues.

At the policy level, the NESO's 30 TWh sustainable threshold and Ofgem's UIOLI consultation together begin to set the quantitative and regulatory framework for the next decade. Thirty terawatt-hours is an ambitious target that implies a forty-six-fold expansion of current grid injection, but it is a realistic ceiling rather than a theoretical maximum, and it is defined by waste feedstock, not energy crops. The "waste-first" direction is now firmly established as the policy consensus. Developers whose projects are aligned with food waste, agricultural residue and industrial organic waste feedstocks, and who are incorporating carbon capture at design stage, are positioned on the right side of the emerging policy framework.

Our researchers at TWD will continue to monitor all six pillars in Issue #7. If you have sector intelligence, project updates or feedback on this issue's coverage, please contact the team at contact-us@tiftservices.co.uk. We welcome practitioner input that strengthens the quality of intelligence for all readers.

The Weekly Digest

AD & Biogas Sector Intelligence | TIFT Services Ltd

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KEY SOURCES & REFERENCES: ISSUE #6

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Scottish Government / Statkraft, Coylton Section 36 consent

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