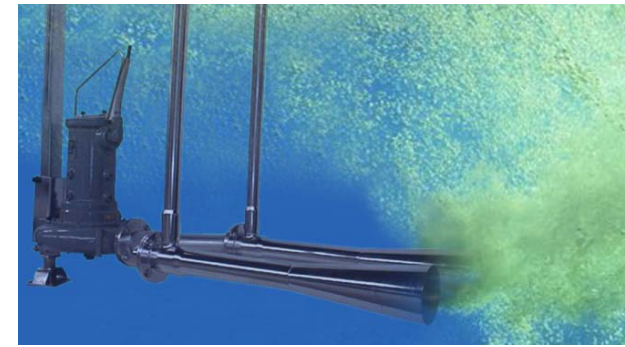




The Anaerobic Digestion and Biogas Association

AD Market Update

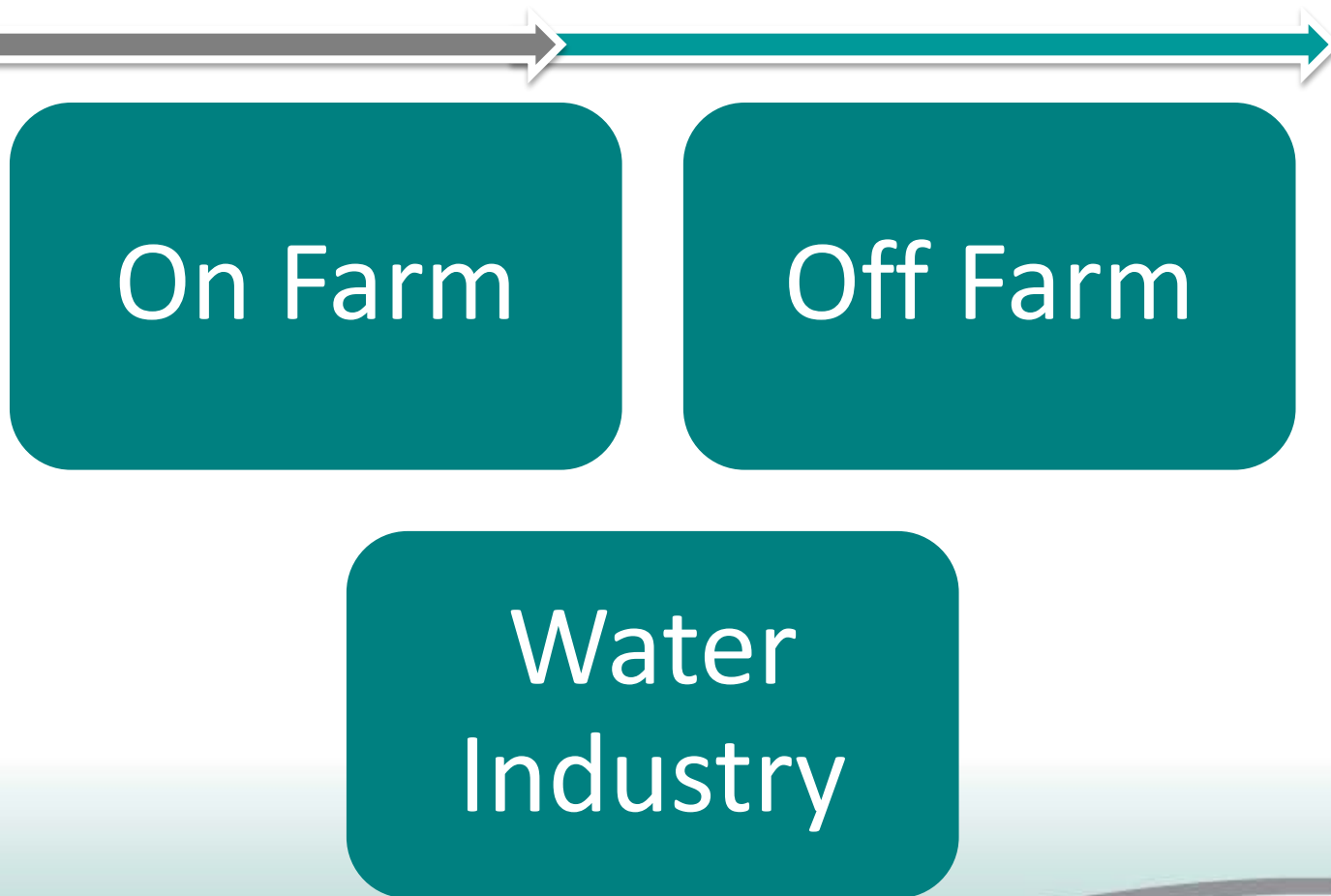


ADBA: a brief synopsis

- Established September 2009
- Objective: to break down the barriers and build a mature, safe industry
- Nearly 200 members
- Represents all of the key AD industry sectors
- In England, Wales, Scotland & N Ireland
- Developed good working relationships with Government and related sectors
- Speaks with a single, united voice



AD in the UK



Scope



£2 billion
industry

40 tWh of
energy

Policy Background



“We will introduce measures to promote a huge increase in energy from waste through anaerobic digestion.”

- Coalition Agreement, 2010

Framework
Document

Incentives

Government
Targets



Drivers



Financial

- Returns
- Mitigating waste and carbon costs

Waste Management

- Dealing with organic waste
- Social Responsibility

Resources

- Source of Energy
- Digestate

Rate of Growth

Will depend on
incentives and
Framework
Document

Common estimate
of potential is 1000
plants over 10 years

AD Internationally



6000 Plants

Energy Crops

Fast Growth

Global Outlook



German concerns

European Competition

Elsewhere

Concerns



Obtaining
Finance

Political
Uncertainty

Grid
Connections

Digestate
Markets

Conclusions

