

The anaerobic digestion market in France

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BIOGAZ/ALLÉE®

Le cluster de la méthanisation

www.biogazvallee.com

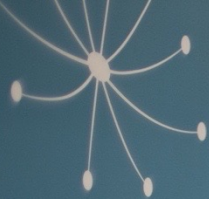


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In partnership with :

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CONCEPTION,
RÉALISATION

Bureaux d'études,
développeurs, constructeurs...

OUVRAGES

VRD, BTP, bâtiments,
zones de stockage...

ÉQUIPEMENTS

Fabricants et distributeurs de
pompes, broyeurs, agitateurs...

APPROVISIONNEMENT

Producteurs de déchets,
collecte et traitement
des matières

**VALORISATION
ÉNERGÉTIQUE**

Motorsistes, opérateurs
de réseaux...

PRESCRIPTEURS

Collectivités, organismes d'État,
d'information et de conseil, asso-
ciations professionnelles, médias...

**EXPLOITANTS
ET PORTEURS
DE PROJETS**

RECHERCHE

laboratoires

VALORISATION DIGESTIF
Traitements, matières
de stockage...

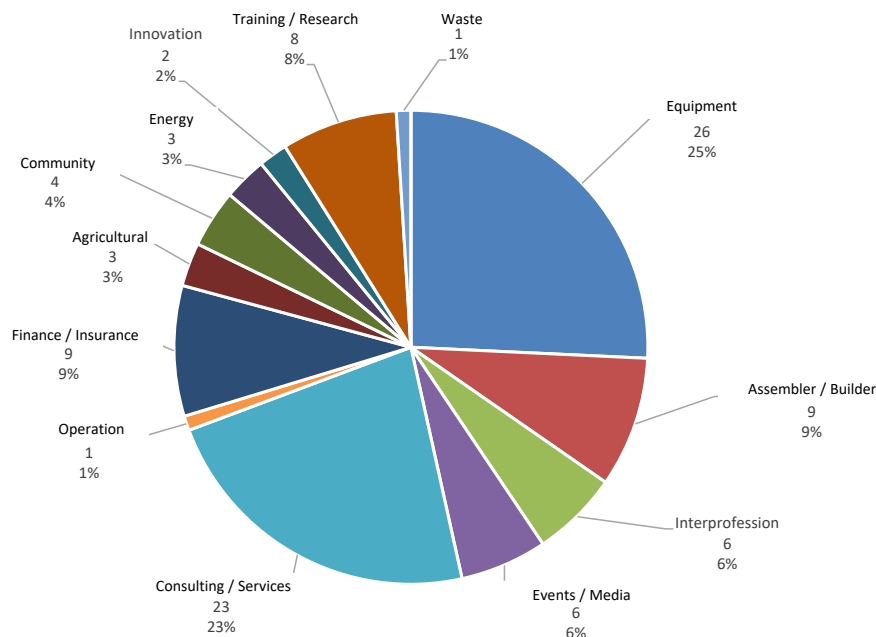
BIOGAZ VALLÉE®, THE BIOGAS SECTOR

Biogaz Vallée®

Biogaz Vallée® is the network of biogas professionals in France whose dual objective is:

- **Develop** an industrial **value-creating** anaerobic digestion sector in France
- **To be exempt, in the long term, from the public subsidy**: to have a viable French economic model (multi actors and multi inputs)

Distribution of members by activity - 2021



101 members

including **18** partners

10 years of existence

2,6 full-time equivalent

Members from **11** different metropolitan areas

KEY DATA ON THE ANAEROBIC DIGESTION MARKET IN FRANCE



Actors in the biogas sector

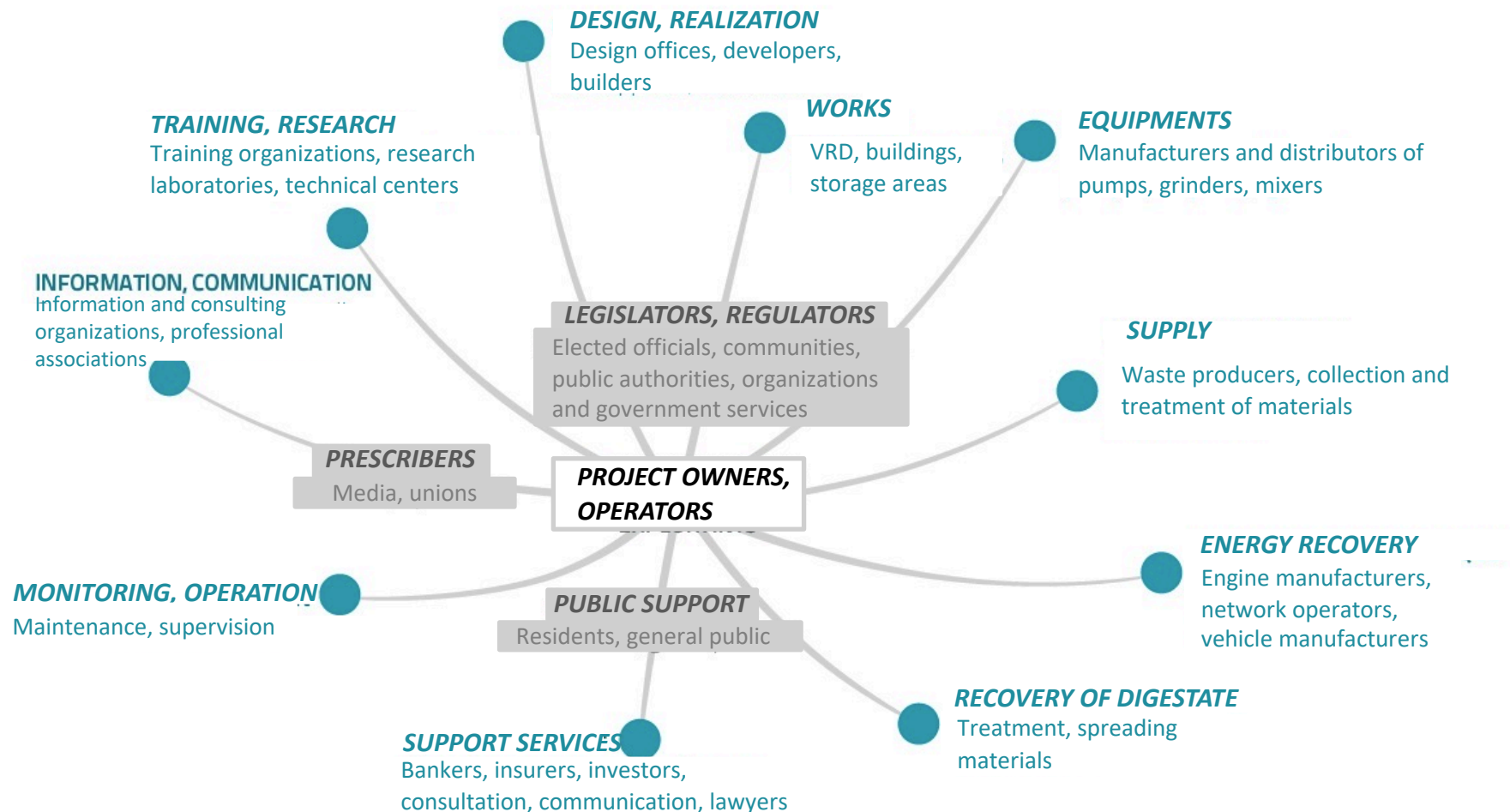


















Schéma – Droits Biogaz Vallée®

Actors of the methanization sector (in blue, typology of Biogaz Vallée members) (source : Biogaz Vallée®, 2018)

6 types of biogas project according to the materials recovered

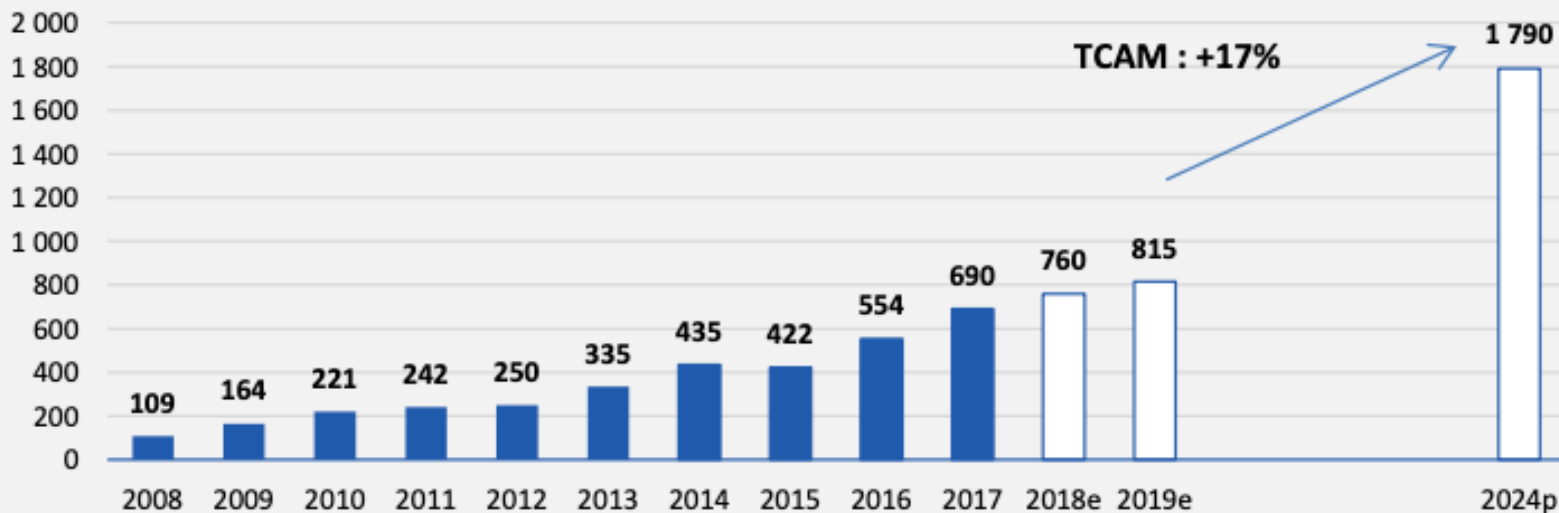
		Markets	Inputs	Types of actors
Waste storage	→	 ISDND ⁽¹⁾	 Non-hazardous waste	Waste market players
Industrial	→	 Industriel	 Industrial waste (liquid and solid), source-separated household waste	Industrial, or even environmental services actors
Territorial	→	 Territorial	 Industrial waste  Agricultural waste  Energy crops  Sludge & treatment Wastewater treatment	Industrial actors
Agricultural	→	 Agricole	 Agricultural waste  Energy crops	Farmers, or even industrial actors (large projects)
Wastewater treatment sludge	→	 STEP ⁽²⁾	 Sludge & treatment Anaerobic wastewater treatment	Actors of the water market
Household waste treatment	→	 Tri Mécano-biologique	 Household biowaste (and similar)	Actors of the waste market

Notes: (1) Non-hazardous waste storage facility (2) Wastewater treatment plant

Anaerobic digestion in France

Turnover of the anaerobic digestion sector in France (*)

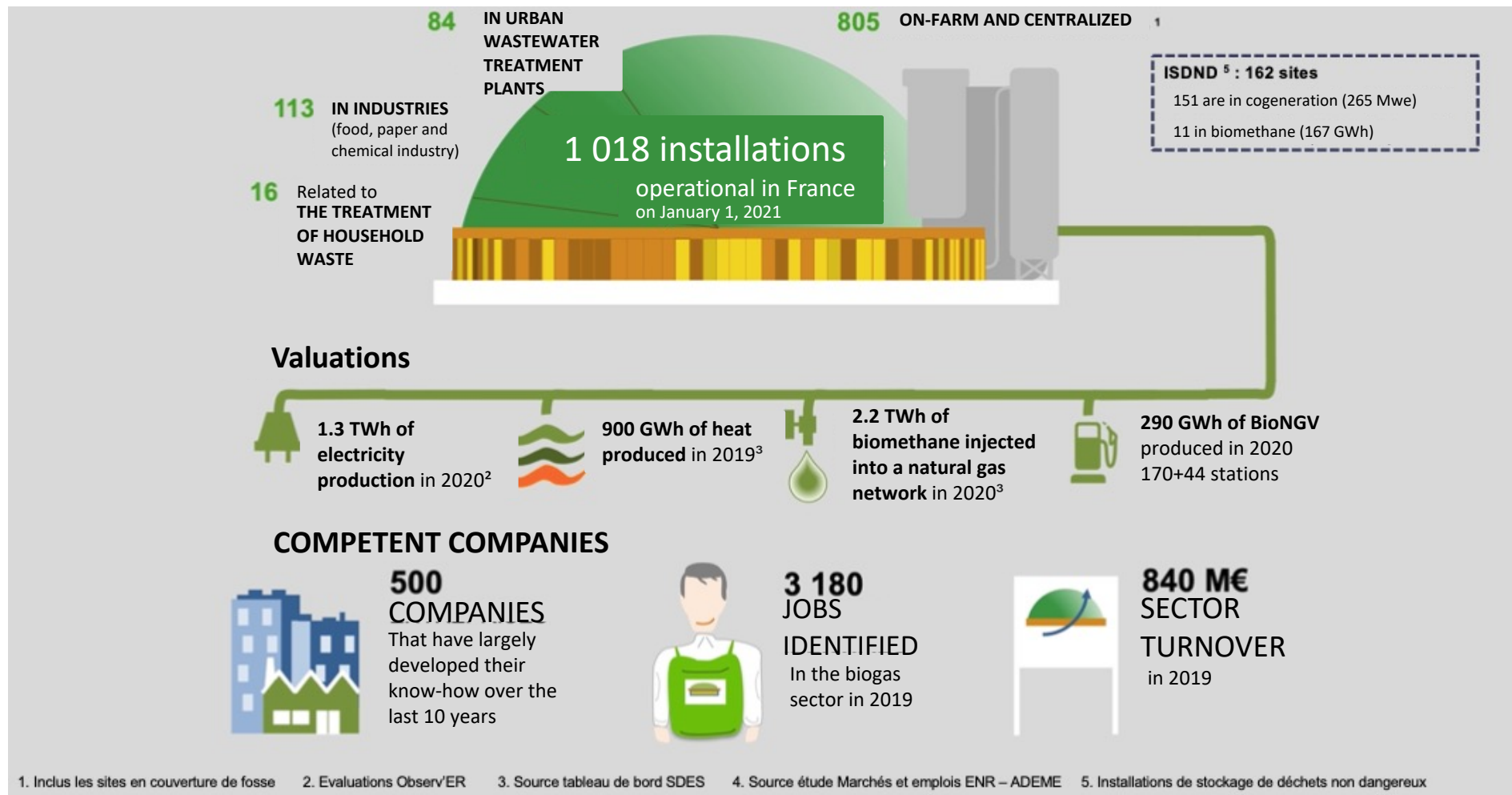
Unit : million euros



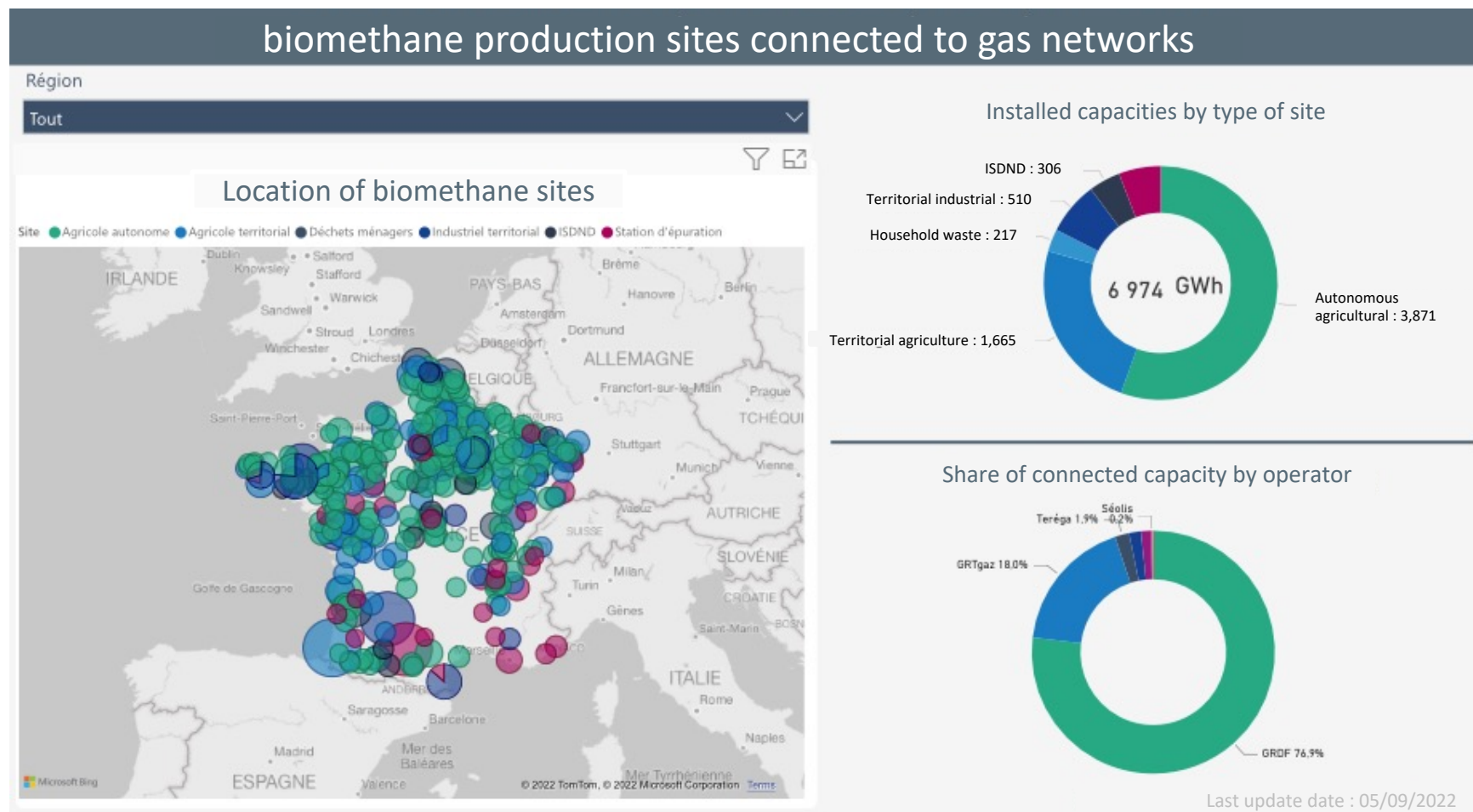
(*) Includes all players in the sector: consulting firms, developers, prime contractors, manufacturers, equipment suppliers and operators - The historical data has been significantly revised by Ademe compared to the previous edition / Processing, estimates and forecasts by Xerfi / Source: Observ'ER via Ademe

12/2019

Anaerobic digestion in France



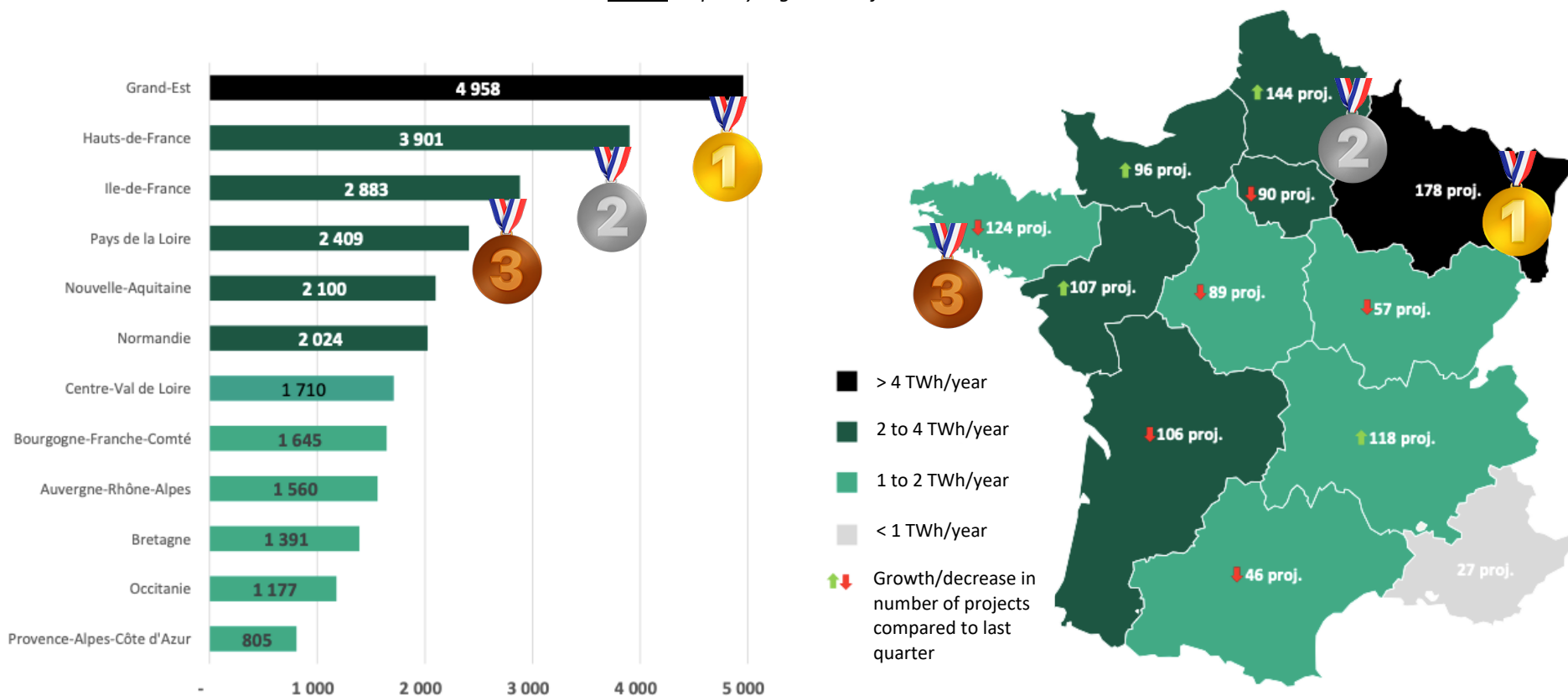
Biomethane in France: late development, exponential growth, waiting for new support systems



Biomethane injected in France

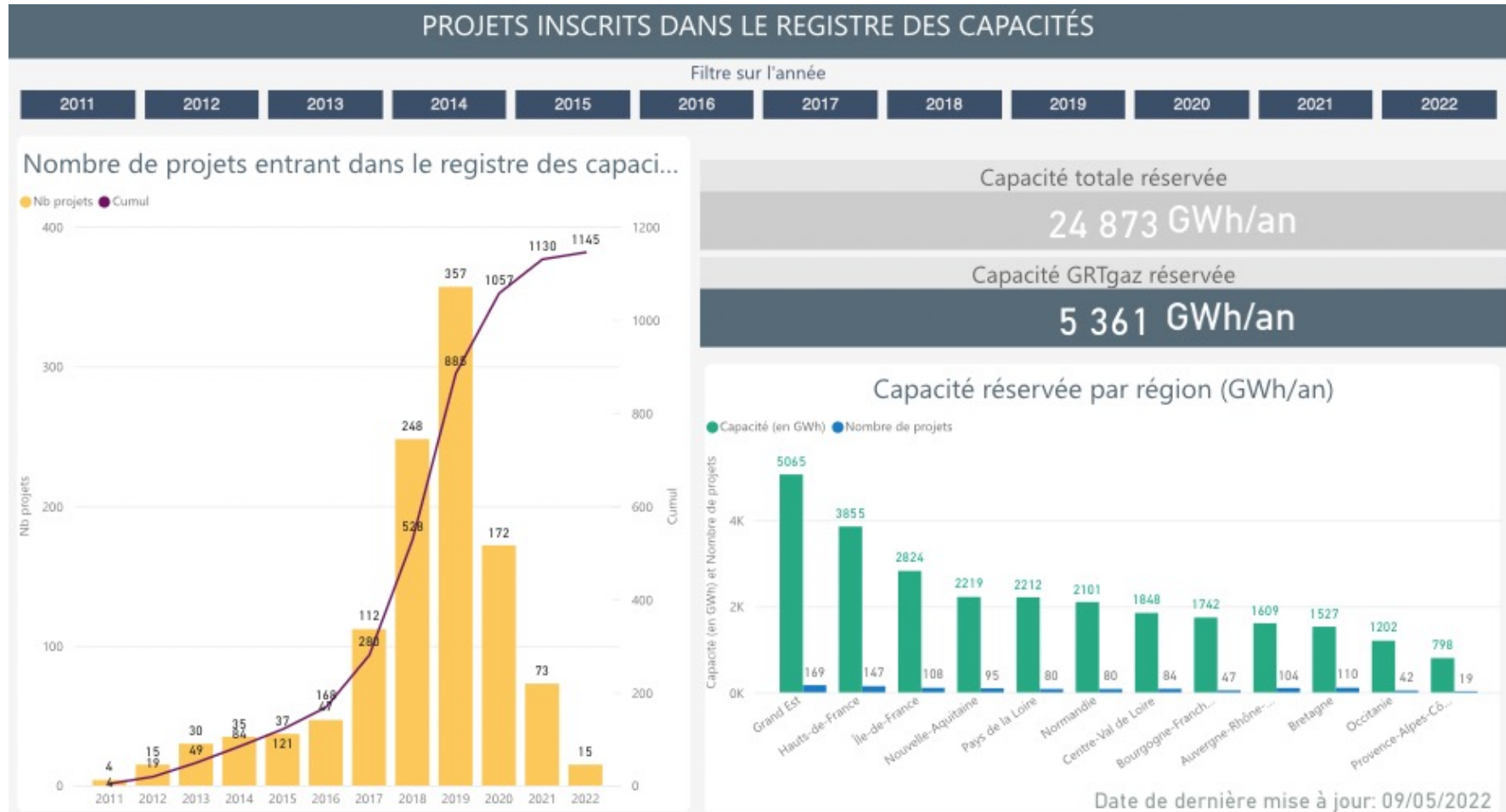
Numbers of projects and reserved capacities by region, expressed in GWh/year

Source: Capacity register as of 06.30.2021



Source: Biomethane injection, Tableau de bord au 30/06/2021 - GRDF, GRTgaz, R-GDS, SPEGNN, TERÉGA

Biomethane in France: late development, exponential growth, waiting for new support systems

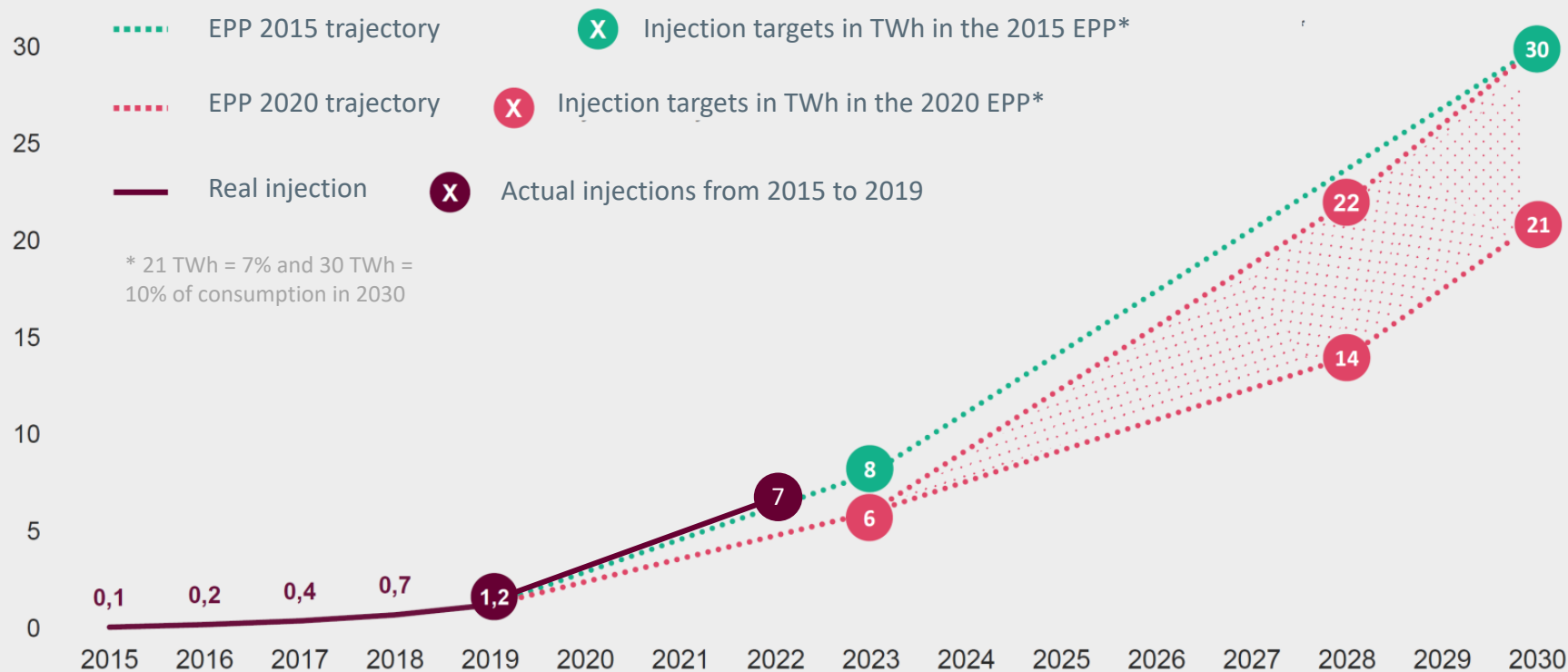


COMMITMENTS AND OUTLOOK



French commitments

New PPE (Multiannual Energy Program) published in the Official Journal on April 23rd 2020:



Jobs – biogas sector

Employment in the anaerobic digestion sector means:

- **Local jobs** that **cannot be relocated**
- **Direct jobs** linked to operations
- **Indirect jobs** (related to design, construction, energy)
- **4 000 jobs** in 2022

Négawatt scenario: 10,000 direct jobs, 60,000 indirect jobs in 2030

New 2019 study on employment carried out by GRDF (available online):

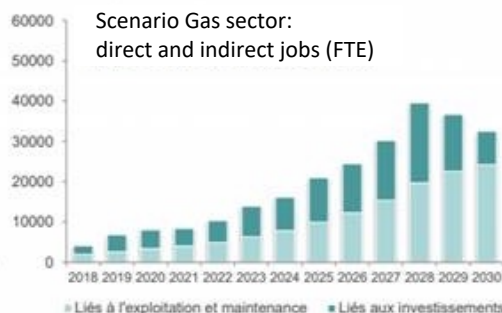
The biogas sector, from 17,000 to 53,000 jobs by 2030



17,667 jobs

10 773 ETP directs / 6 894 ETP indirects

x4 between 2019-2030



32,550 jobs

20 129 ETP directs / 12 421 ETP indirects

x8 between 2019-2030



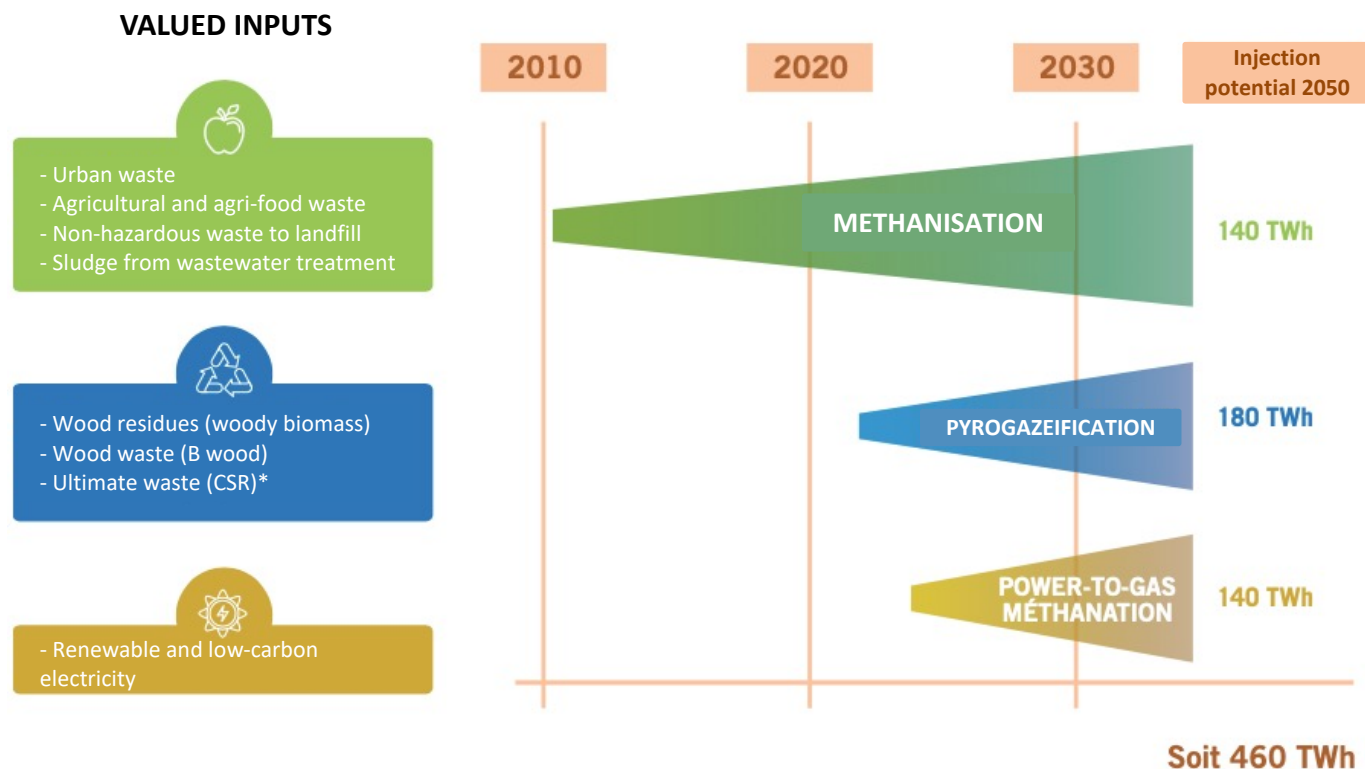
53,186 jobs

31 549 ETP directs / 21 637 ETP indirects

x13 between 2019-2030

Outlook

- **Adaptation of networks:** mesh, reverse, local storage, smartgrid
- The development of **bioNGV** for green mobility
- **Renewable gases** and **CO₂ valorization**



Source: "Green gases: Let's strengthen our synergies" - ATEE, March 2021

*Solid Recovered Fuels - produced from non-hazardous waste that cannot be sorted or recycled

Source: Study "A 100% renewable gas mix in 2050?", ADEME, 2018

**Thank you for
your attention!**



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