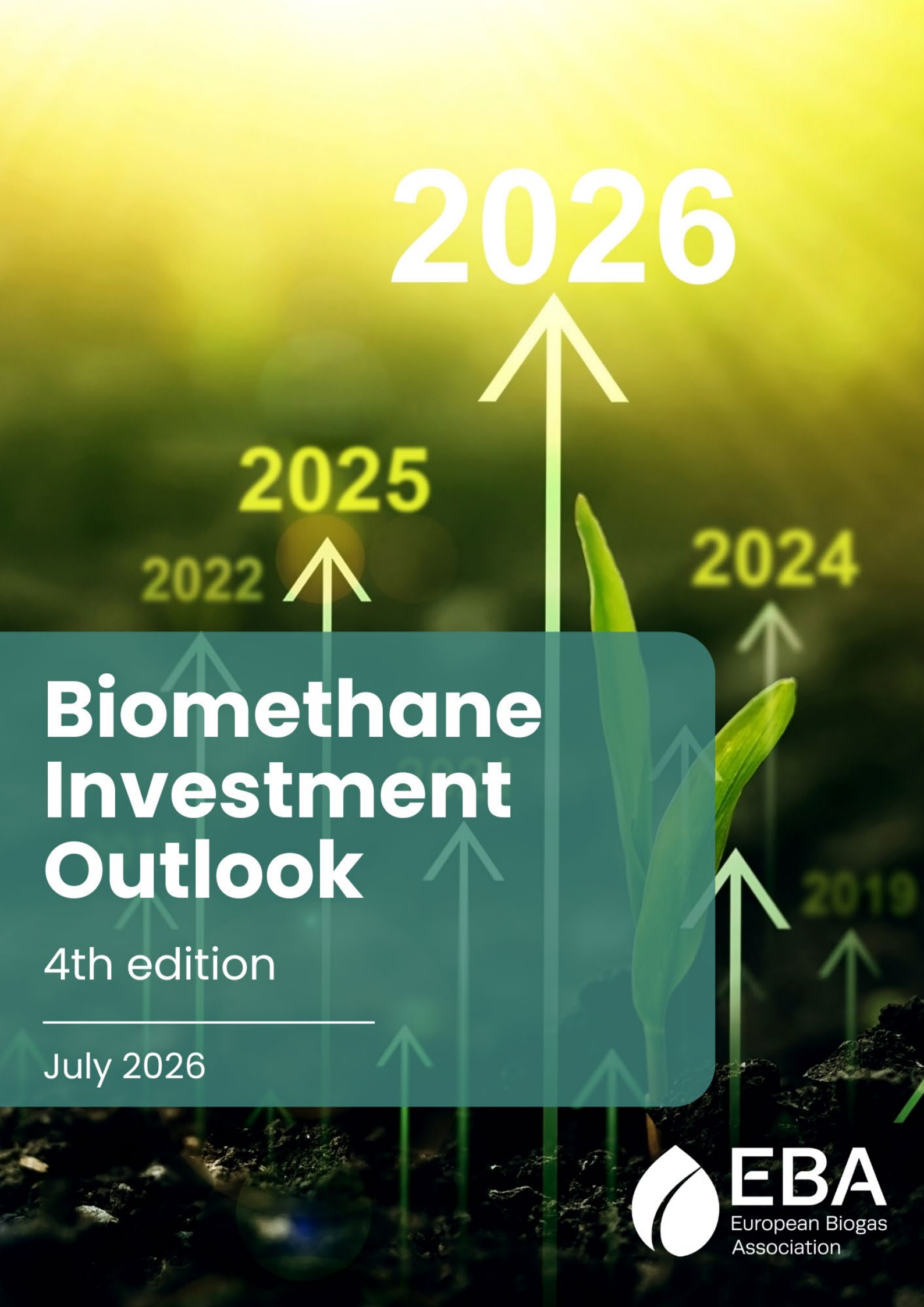


Biomethane Investment Outlook

4th edition

July 2026

EBA
European Biogas Association

Annual investment assessments conducted by the EBA indicate sustained growth in the European biogas and biomethane sector. The latest Investment Outlook reports €36 billion in planned investments from 37 participating investors and project developers, as well as with publicly disclosed projects. Compared with the 2025 edition of the outlook planned investments grew by 28%, this represents an increase of €8 billion in committed capital and an additional 2 bcm of expected production capacity, bringing the additional projected biomethane output to 9.4 bcm per year by 2030. These annual assessments not only quantify investment activity but also serve as an indicator of market confidence and the sector's long-term expansion prospects.

Investment timeline and geography

EBA data indicates that as of 2024, €351 million has already been invested, with the majority of planned biomethane plants now up and running, delivering 966 GWh of production capacity. This momentum reflects strong progress, and the latest analysis shows that a total of **€35.76 billion** has been allocated for future investments, with **€34.9 billion** designated for developments within Europe by 2030: **€ 3 billion** in the timeframe 2025 – 2026, while another **€22 billion** is set aside for the period 2027 – 2030. A further **€10 billion** is expected to be invested beyond 2030, beyond Europe or with the timeframe yet to be specified.

When comparing these timeframes with our 2025 analysis, the total investment allocated to projects scheduled for 2025–2026 appears to have declined from €8 billion to €3 billion. However, this decrease reflects the progression of projects rather than a reduction in investment activity. In the 2025 analysis, approximately €3 billion of the €8 billion was classified as "planned", while the remaining investments were already under construction or operational. In the current assessment, around 90% of the investments within the 2025–2026 timeframe are under construction, indicating that many of the projects previously identified as planned have since advanced to the implementation phase. For the 2027–2030 period and beyond, planned investments show an upward revision compared with the previous assessment. Total committed investment increased from €19 billion to €22 billion, representing an increase of approximately 15.8%. This adjustment indicates a strengthening of the investment pipeline over the longer term, reflecting additional projects being added or expanded within the forecast horizon.

It is projected that these investments will yield a total added capacity of **9.5 bcm** of biomethane per year, of which 9 bcm is within Europe. The remaining 0.5 bcm is anticipated to be either non-European, after 2030, or yet to be specified. A full breakdown is provided in *Table 1*. The 37 industrial stakeholders participating in this research reported that more than **1,200** biomethane plants should enter operation in the next 5 years, another indication of the ongoing development in the sector.

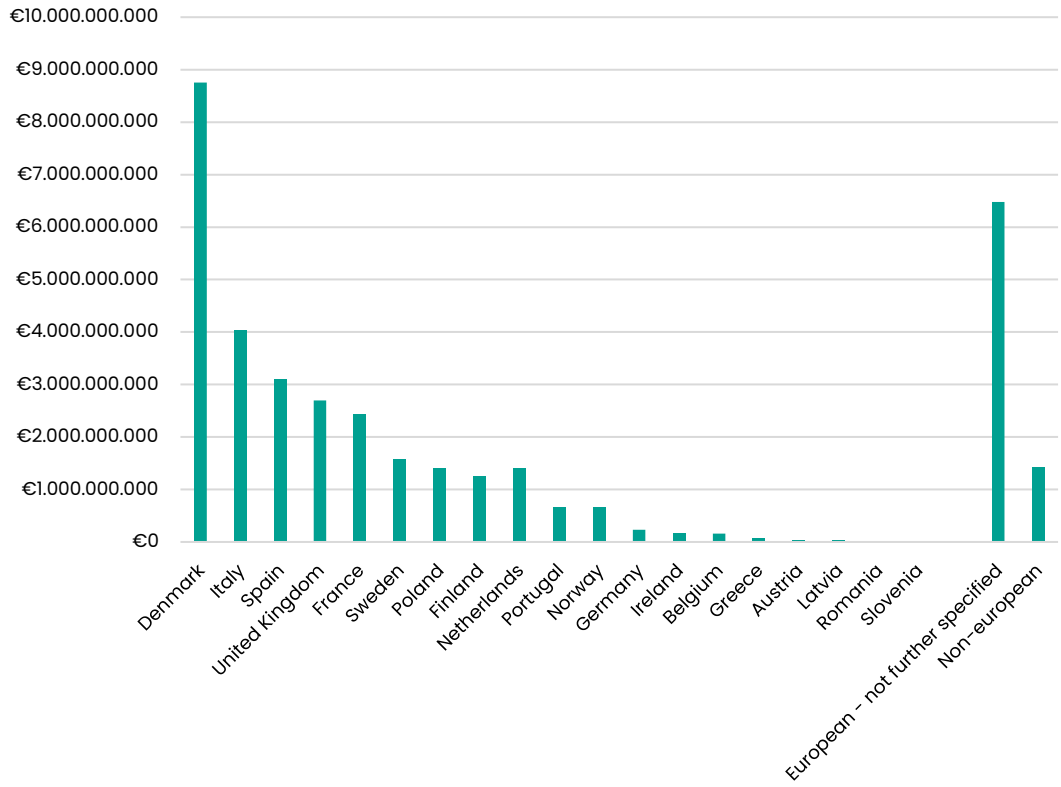
Table 1. Investment volumes and additional biomethane production capacities for the timeframes 2025-2026, 2027-2030 and post 2030*

	European			Non-European or Non-specified	Total
	2025-2026	2027-2030	Post 2030		
Investment volume (EUR)	3.32 billion	22.44 billion	10.05 billion	0.31 billion	35.76 billion
Production capacity (bcm biomethane)	0.8 bcm	6.2 bcm	2.4 bcm	0.05 bcm	9.5 bcm

*Table does not include investments and capacity already completed in 2024 (0.35 billion Eur and 0.1 bcm respectively)

Top countries with planned investments are **Denmark (€8.7 billion), Italy (€4 billion)**, **Spain (€ 3 billion)**, **UK (€2.6 billion)** and **France (€2.4 billion).** These are followed by Sweden (€1.5 billion), Poland (€1.3 billion), and Finland (€1.2 billion). A further €6.4 billion is reserved to be invested in Europe, with the destination of the financial envelope still open. Available data indicates that €1.4 billion will be invested outside Europe. These outcomes are summarised in *Figure 1* and *Table 2*, alongside the additional foreseen capacity per country.

Figure 1. Distribution of investment volumes in Europe (all timeframes)



Types of investment

The largest investment slice (€31.5 billion) is planned for greenfield (fully new) plants, accounting for **87%** of the total share of investments, whilst €4.4 billion is reserved for brownfields (upgrading of existing facilities, e.g. converting biogas-CHP plants to biomethane production facilities). This development indicates a significant increase in interest in retrofitting existing facilities. Another €0.24 billion goes to mergers and acquisitions, and for €0.21 billion the investment type is not yet specified.

Investment gaps and trends

A remarkable 30% increase in Greenfield investments has been observed compared with the same period last year. In particular, following the introduction of capital grants in Italy and Norway, Italy has seen an impressive surge in investment, exceeding €3 billion during the same time frame last year.

Additionally, nearly **€8 billion** in investments this year have been allocated to infrastructure upgrades. These include mainly Grid infrastructure development in countries like Denmark, Netherlands and Sweden. Whilst an additional **€781 million** was earmarked for investment in technology and end use facilities such as filling stations, liquefaction equipment and biogenic CO_2 technologies.

Overall, the sector has seen significant growth across the value chain, a clear indication of secure production and enhanced resilience of EU energy supply.

Table 2. Distribution of investment volumes and foreseen capacities in Europe (all timeframes)

	Investment volume	Foreseen capacity
Denmark	€8.75 billion	20.9 TWh/year
Italy	€4.03 billion	23 TWh/year
Spain	€3.10 billion	8.5 TWh/year
United Kingdom	€2.70 billion	7.4 TWh/year
France	€2.44 billion	5.3 TWh/year
Sweden	€1.56 billion	5.1 TWh/year
Poland	€1.40 billion	3.2 TWh/year
Netherlands	€1.39 billion	4.4 TWh/year
Finland	€1.25 billion	2.5 TWh/year
Portugal	€0.66 billion	1.6 TWh/year
Norway	€0.65 billion	2.1 TWh/year
Germany	€0.24 billion	1.3 TWh/year
Ireland	€0.17 billion	1.0 TWh/year
Belgium	€0.16 billion	0.6 TWh/year
Greece	€0.06 billion	0.8 TWh/year
Austria	€0.03 billion	0.1 TWh/year
Latvia	€0.03 billion	0.08 TWh/year
Romania	€0.01 billion	0.01 TWh/year
Slovenia	€0.02 billion	0.01 TWh/year
Europe – not further specified	€6.4 billion	11.9 TWh/year
Non - European	€1.42 billion	2.5 TWh/year

About the European Biogas Association (EBA)

EBA fully believes in the future potential of renewable gas in Europe. Founded in 2009, the association is committed to the deployment of sustainable biogas and biomethane production and use throughout the continent. EBA counts today on a well-established network of over 350 national associations and other organisations covering the whole biogas and biomethane value chain across Europe and beyond.

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