



**AMERICAN
BIOGAS
COUNCIL**

US Biogas Industry Investment & Opportunities

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October 23, 2024 | BUSINESS OF BIOGAS | St. Louis, MO

The US Biogas Market

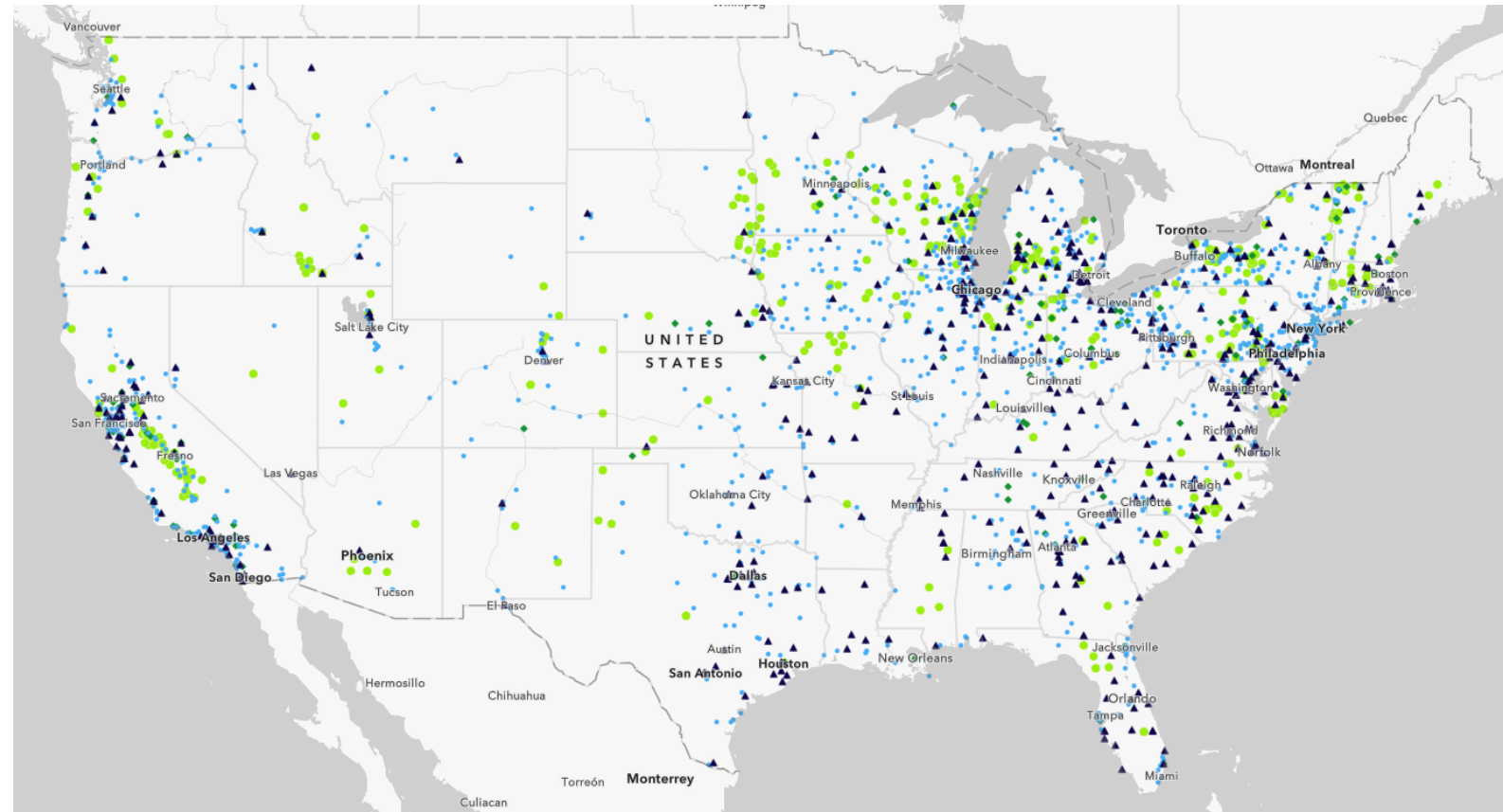


Operational Biogas Systems: 2,327

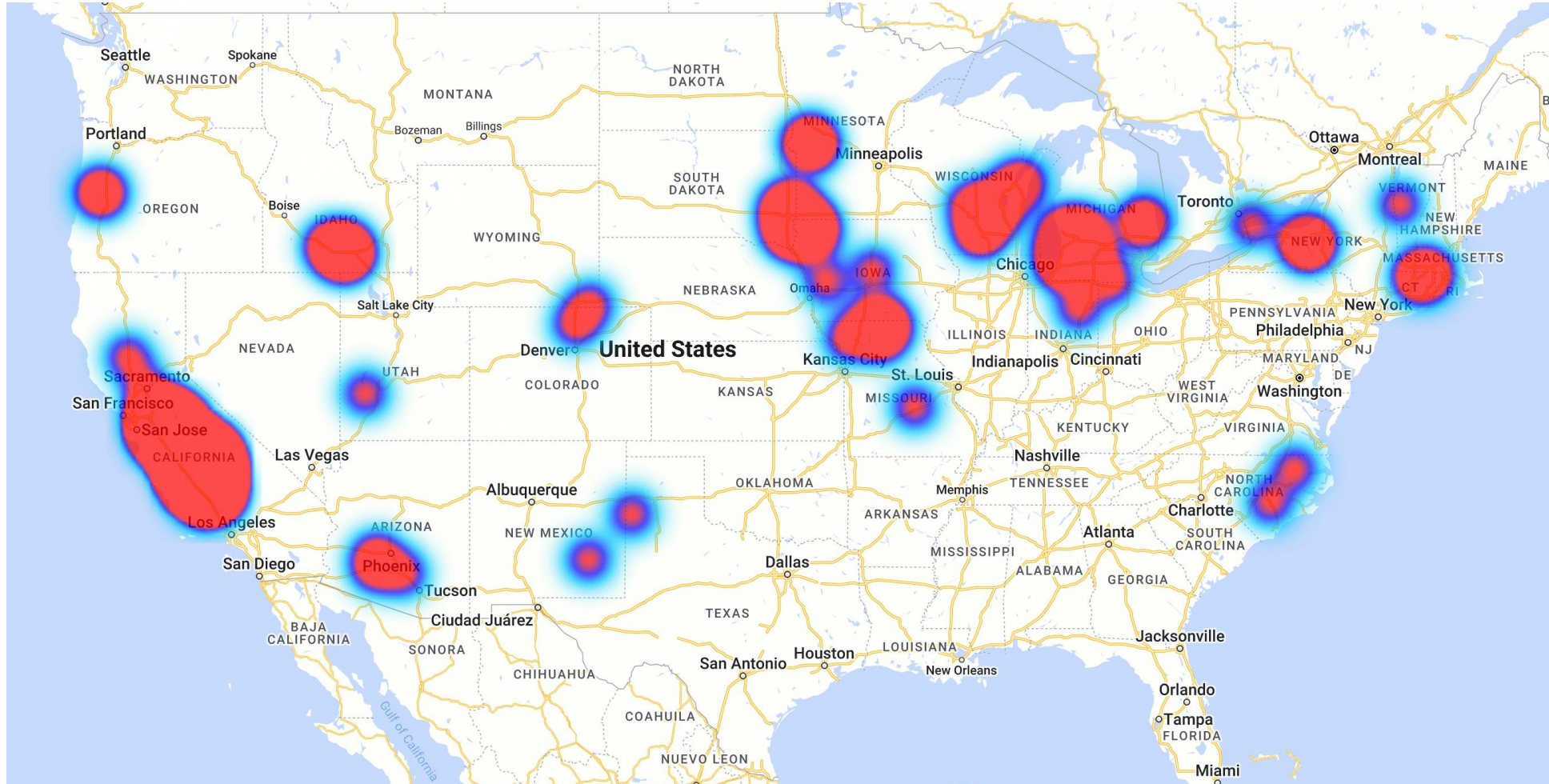
- 456 RNG
- 1,409 Electricity
- 526 on Farm
- 1,112 Wastewater
- 110 Food Scrap
- 579 at Landfills

Potential New Biogas Systems: 24,000

- 17,000 on Farms
- 4,000 Wastewater
- 1,700 Food Scrap
- 740 at Landfills



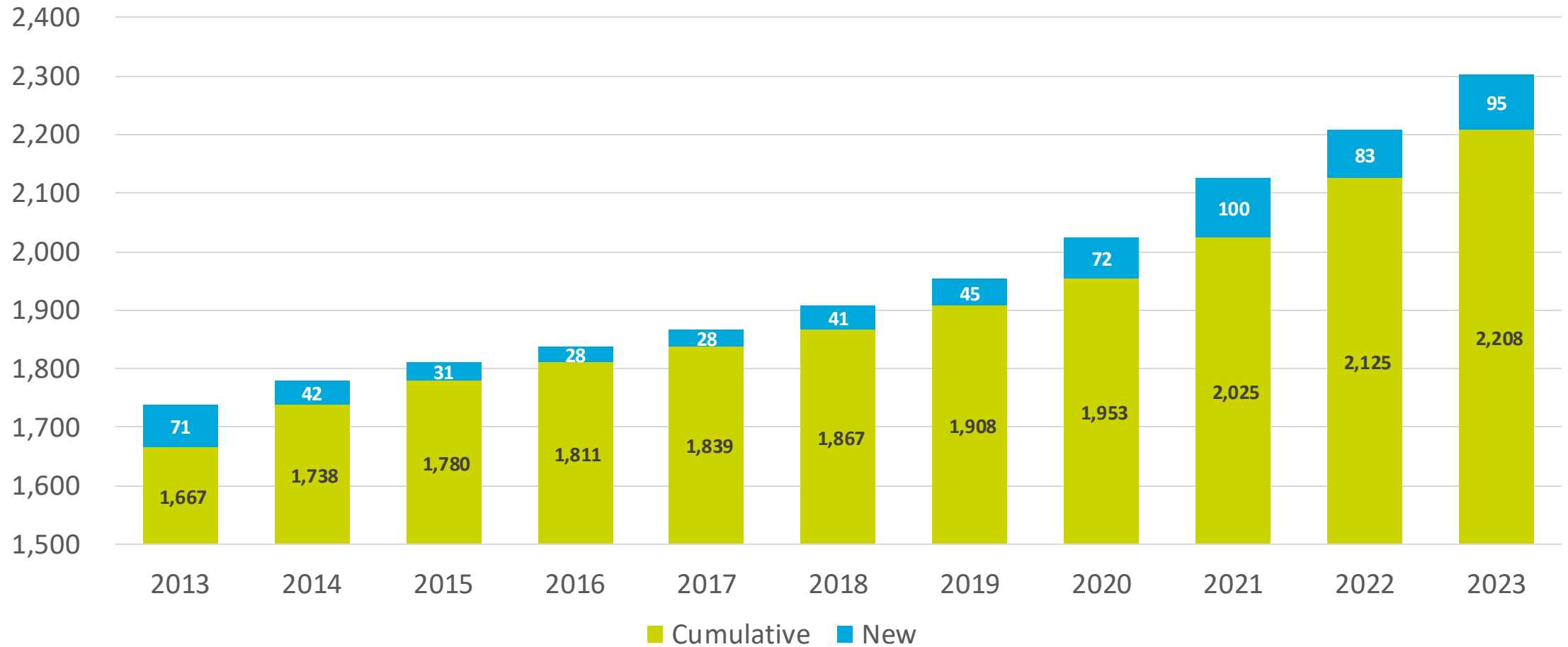
New Power & RNG Biogas Systems (2022/2023)



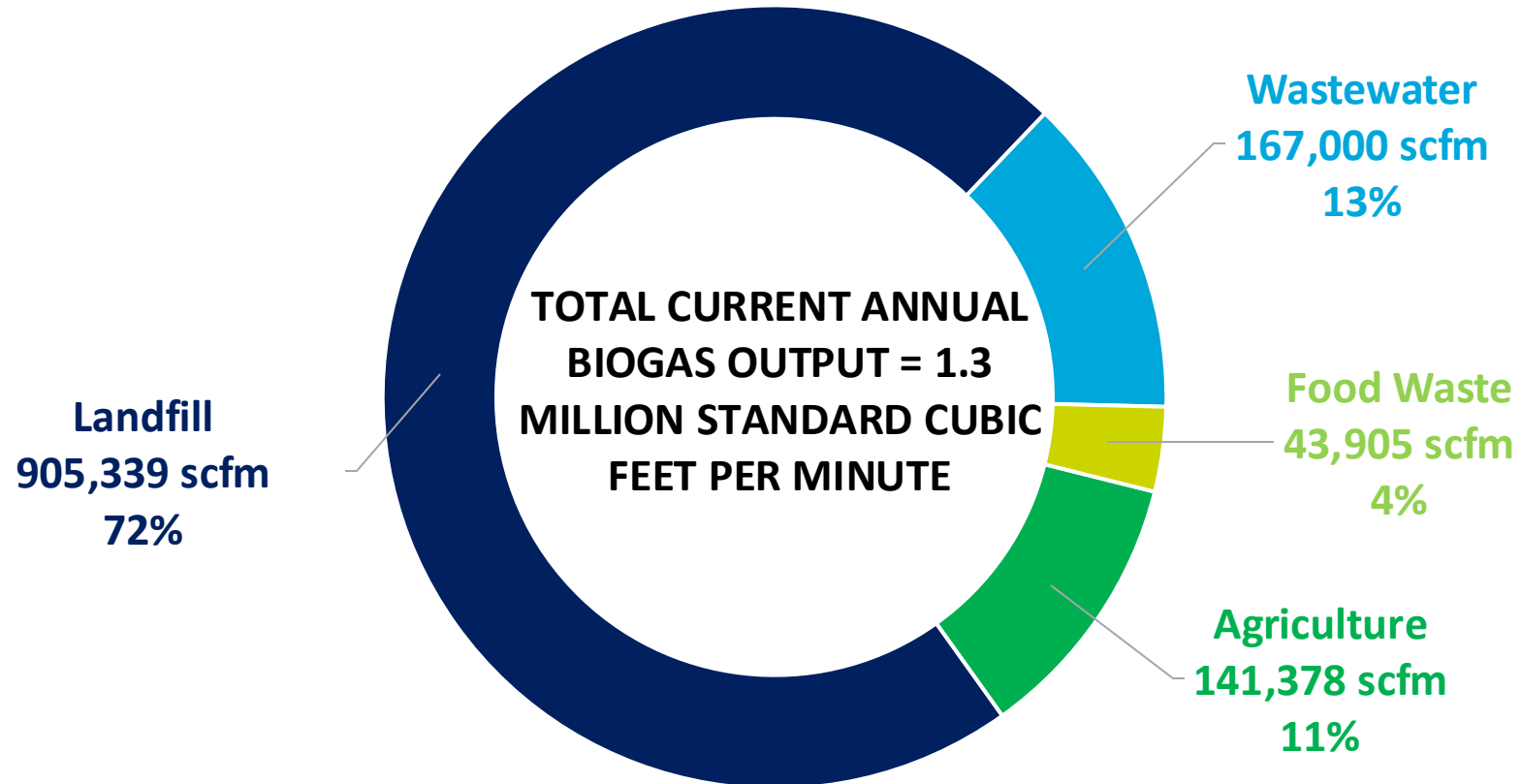
Biogas Systems in the US



Number of Biogas Systems in the US, 2013-2023



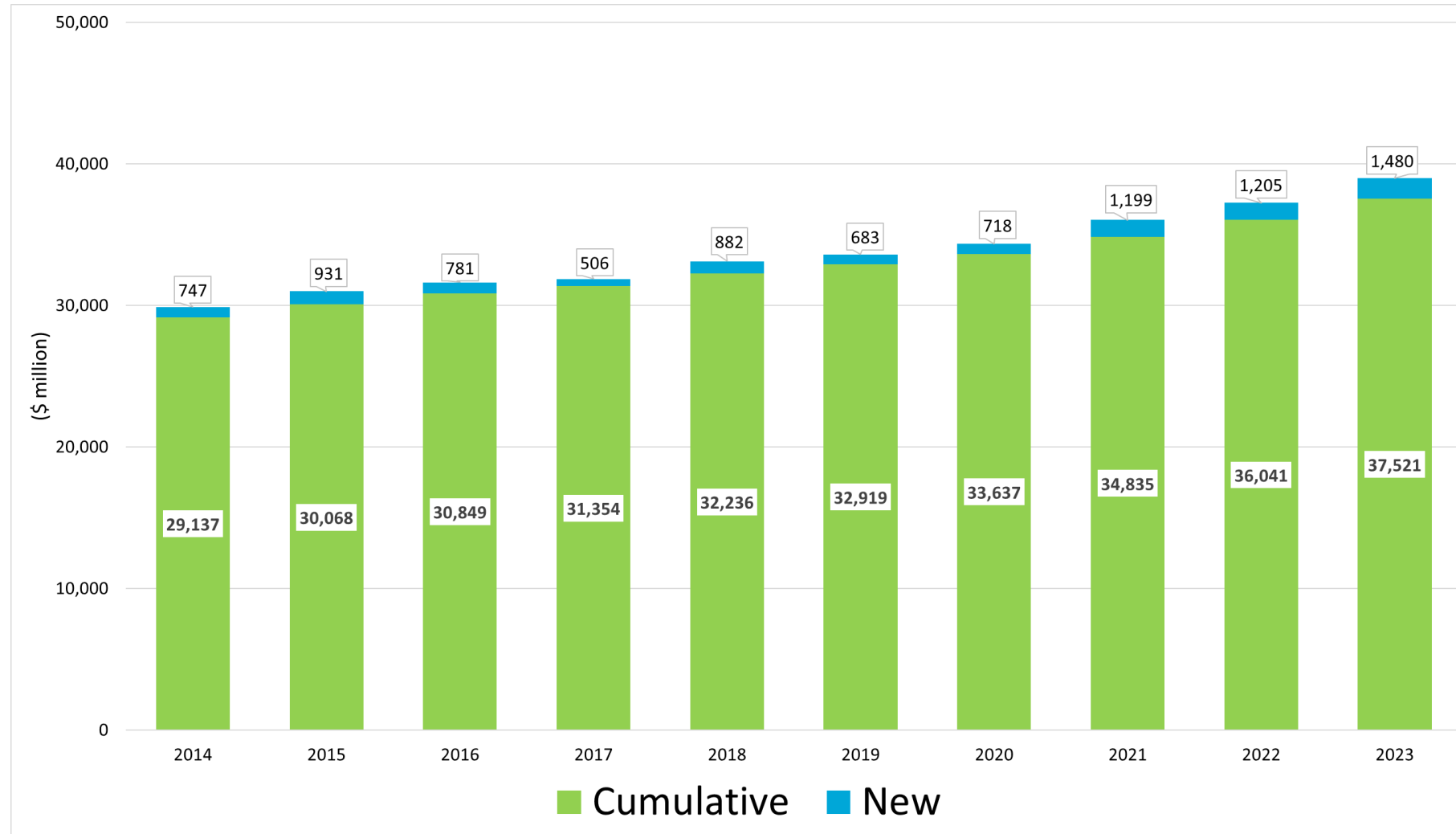
Total Biogas Output



Investment

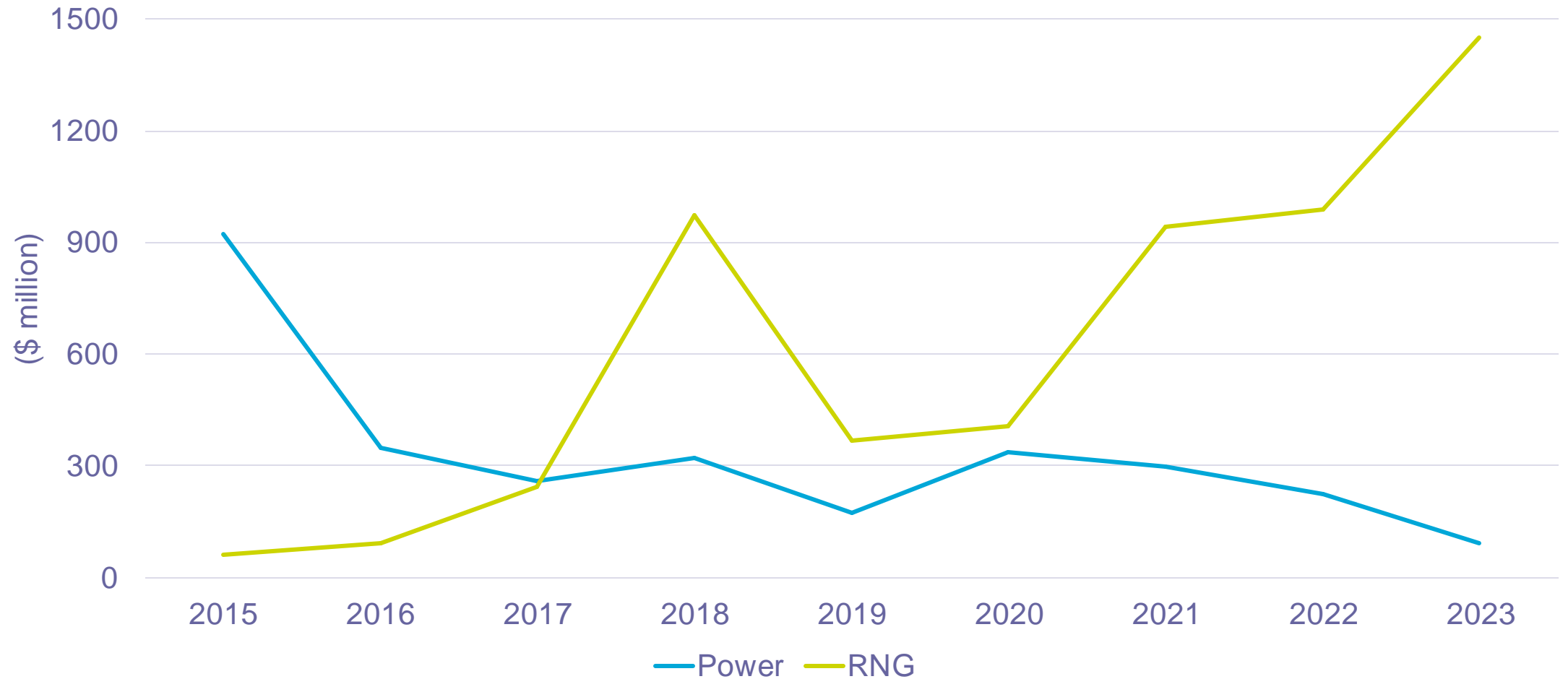
The image features a dark blue background with two large, overlapping teal circles. The circles overlap in the lower right quadrant, creating a darker teal intersection. The word "Investment" is written in a bold, white, sans-serif font in the upper left area of the image.

Total Capital Investment in U.S. Biogas Systems

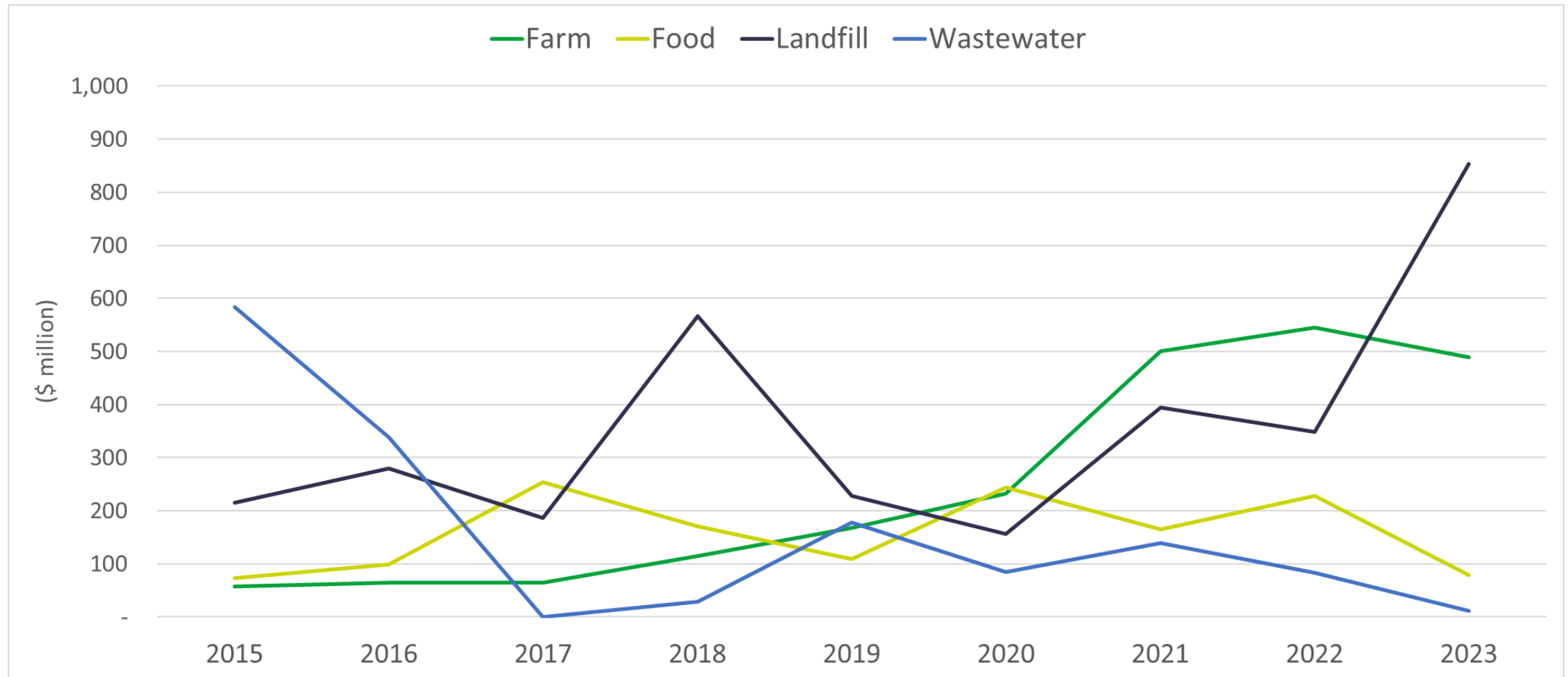


NOTE: Investment is attributed to the year system went into operation.

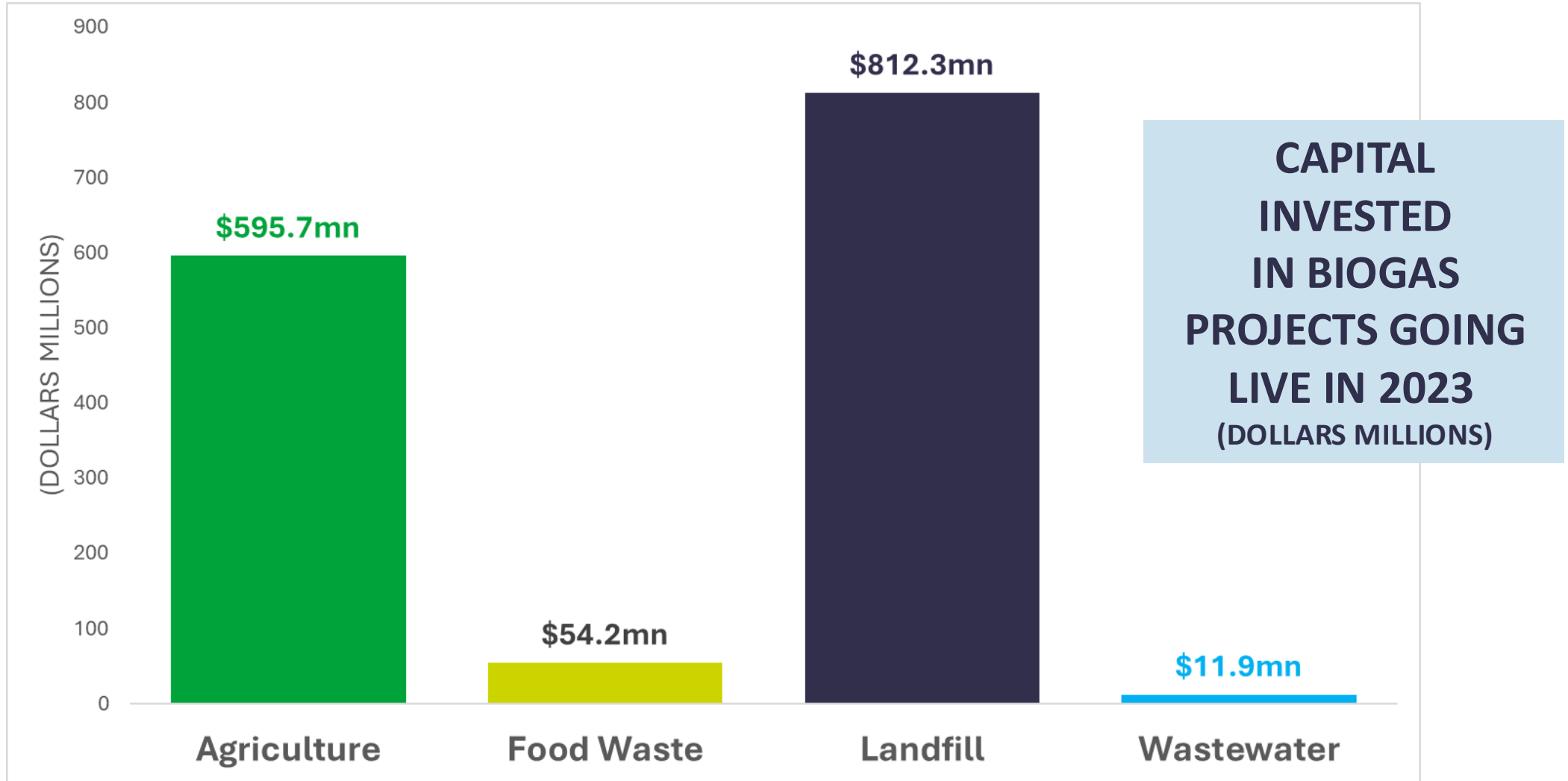
Investment in New Biogas Systems (2015-2023)



Capital Invested in New Biogas Systems 2015-2023 (by year of commissioning)



Capital Invested in Biogas Projects Going into Operation in 2023





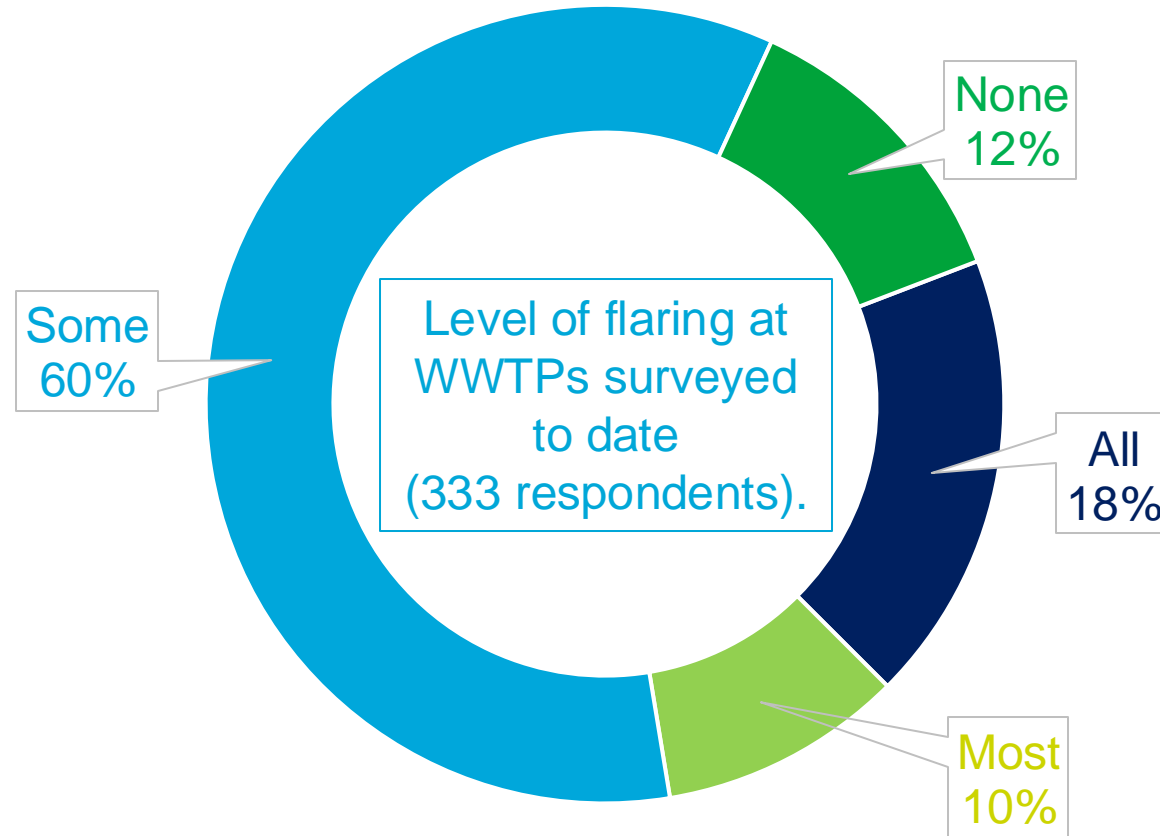
Capital Investment per SCFM of RNG Output



Opportunities

The image features a dark blue background with two large, overlapping teal circles. The circles overlap in the lower right quadrant, creating a darker teal intersection. The word "Opportunities" is written in a bold, white, sans-serif font in the upper left area of the image.

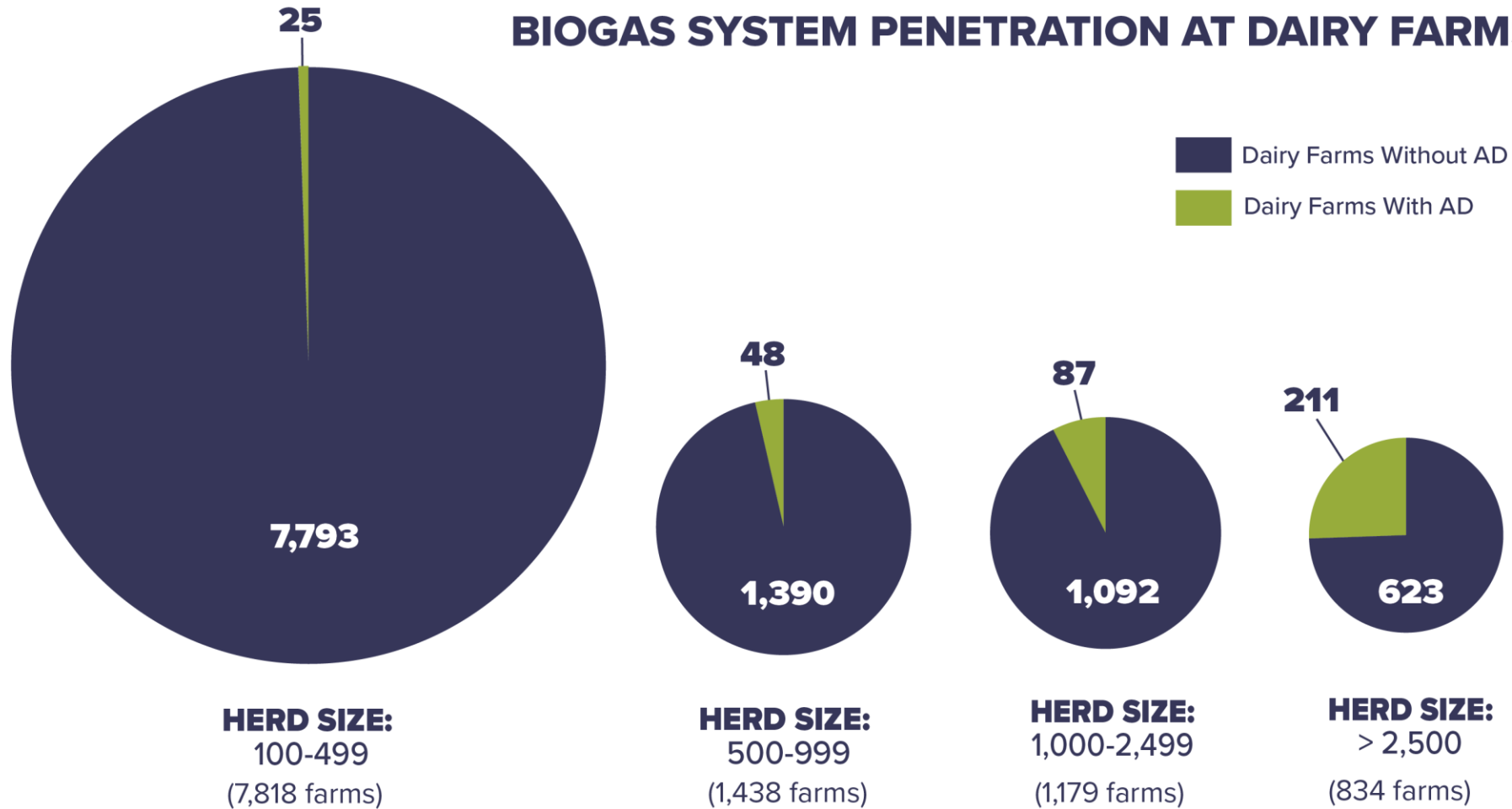
Flaring at U.S. WWTP Biogas Systems



Smaller Farms = Big Opportunity



BIOGAS SYSTEM PENETRATION AT DAIRY FARMS

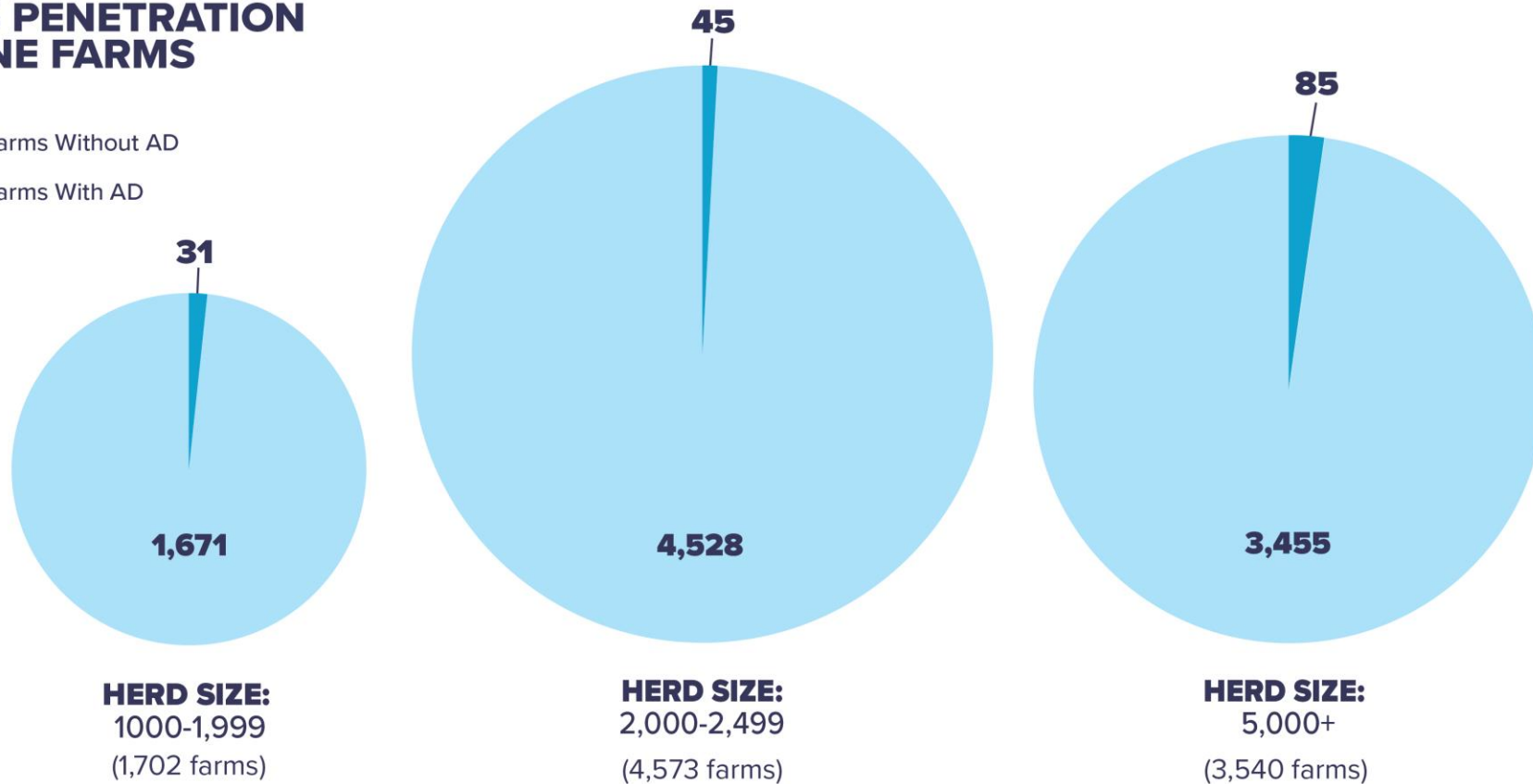


BIOGAS PENETRATION AT SWINE FARMS



BIOGAS PENETRATION AT SWINE FARMS

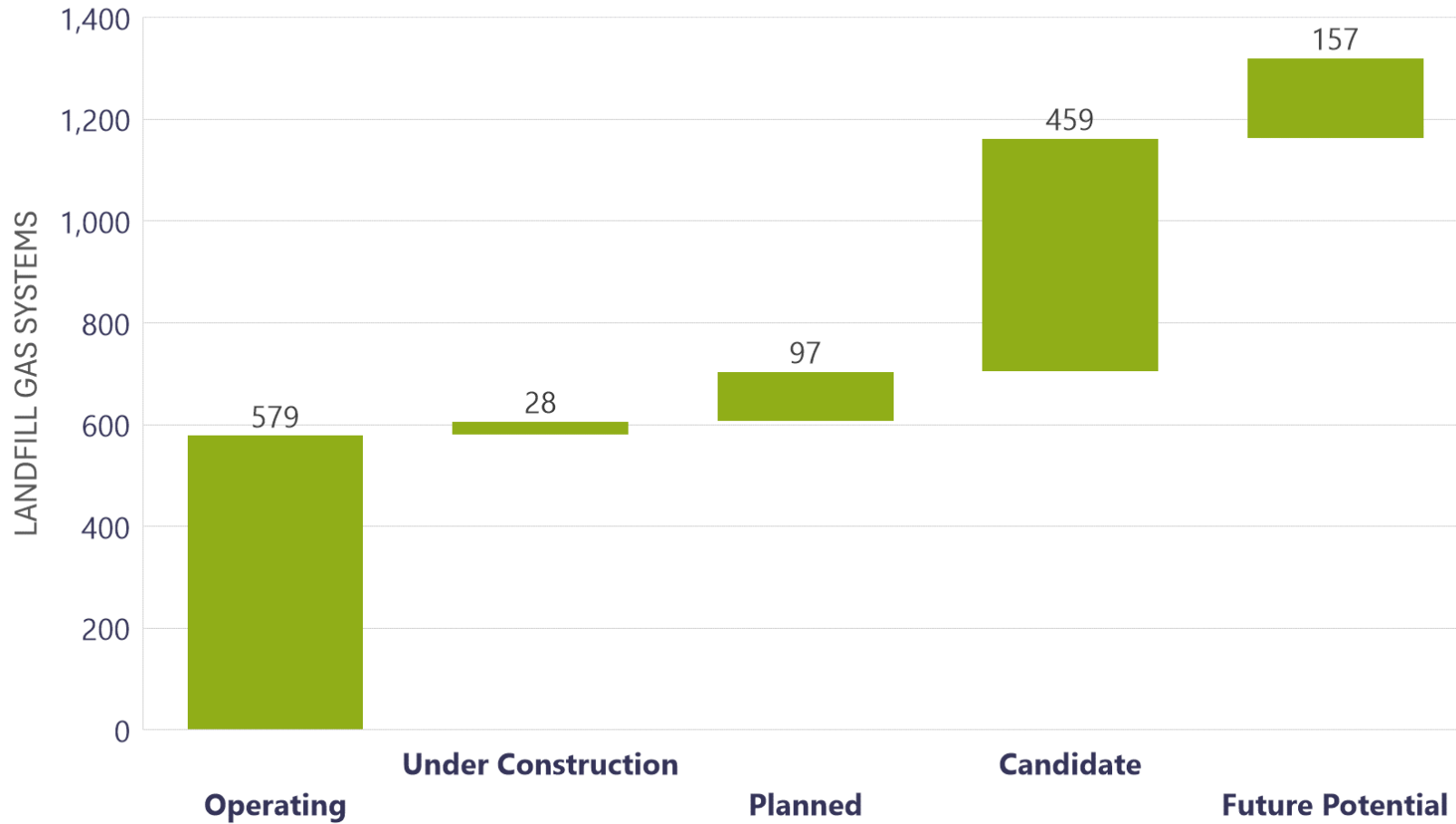
- Swine Farms Without AD
- Swine Farms With AD



Source: American Biogas Council, *Biogas Projects Database 2024*
USDA National Agricultural Statistics Service, 2022 Census of Agriculture



Number of U.S. Landfill Gas Systems and Potential Growth



Destinations for Post-Consumer Food Waste in the US



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