

CHAPTER ONE: INTRODUCTION.....	1
STUDY GOALS AND OBJECTIVES.....	1
REASONS FOR DOING THE STUDY	1
INTENDED AUDIENCE.....	2
SCOPE AND FORMAT OF REPORT	2
METHODOLOGY	3
INFORMATION SOURCES.....	3
ANALYST CREDENTIALS.....	4
RELATED REPORTS	4
BCC ONLINE SERVICES.....	4
DISCLAIMER	4
 CHAPTER TWO: EXECUTIVE SUMMARY.....	 5
EXECUTIVE SUMMARY.....	5
EXECUTIVE SUMMARY (CONTINUED)	6
<i>SUMMARY TABLE VALUE OF THE GLOBAL MARKET FOR BIOGAS AND LANDFILL GAS EQUIPMENT FOR WASTE-DERIVED ENERGY, THROUGH 2016 (\$ MILLIONS)</i>	7
<i>SUMMARY FIGURE VALUE OF THE GLOBAL MARKET FOR BIOGAS PLANT EQUIPMENT FOR WASTEWATER- AND BIOSOLIDS- DERIVED ENERGY, 2000–2016 (\$ MILLIONS)</i>	7
 CHAPTER THREE: OVERVIEW	 8
<i>TABLE 1 GLOBAL PRIMARY ENERGY PRODUCTION BY SOURCE, 2010 (BTU QUADRILLION, %)</i>	8
<i>FIGURE 1 GLOBAL PRIMARY ENERGY PRODUCTION BY SOURCE, 2010 (BTU QUADRILLION, %)</i>	9
BENEFITS	10
<i>TABLE 2 GLOBAL GREENHOUSE GAS EMISSIONS BY EMISSION TYPE (%)</i>	10
<i>FIGURE 2 GLOBAL GREENHOUSE GAS EMISSIONS BY EMISSION TYPE (%)</i>	11
ADVANTAGES OF BIOGAS COMPARED TO OTHER FORMS OF RENEWABLE ENERGY.....	12
BARRIERS TO LARGE-SCALE BIOGAS PLANT DEPLOYMENT	13
BENEFITS OF SMALL-SCALE BIOGAS INSTALLATIONS	14
BARRIERS TO SMALL-SCALE BIOGAS INSTALLATIONS	14
GLOBAL BIOGAS PRODUCTION POTENTIAL	15
<i>TABLE 3 GLOBAL BIOGAS PRODUCTION POTENTIAL BY FEED SOURCE (TOE/YR)</i>	15
<i>FIGURE 3 GLOBAL BIOGAS PRODUCTION POTENTIAL BY FEED SOURCE (TOE/YR)</i>	16
FACTORS INFLUENCING THE BIOGAS INDUSTRY	16
POLICY.....	16

INCENTIVES	17
HISTORY OF BIOGAS	17
ANAEROBIC DIGESTION	18
<i>TABLE 4 SUITABLE FEEDSTOCKS FOR ANAEROBIC DIGESTION</i>	19
ANAEROBIC MICROORGANISMS	19
PROCESS STEPS	20
BATCH OR CONTINUOUS METHODS	21
TEMPERATURE.....	22
PH LEVELS.....	22
SOLIDS CONTENT	23
RETENTION TIME	23
BIOGAS YIELDS	24
STAGES.....	24
ANAEROBIC DIGESTERS	25
Anaerobic Lagoon	25
Covered Lagoon Digester	25
Plug-Flow Anaerobic Digester	26
Anaerobic Contact Digester	27
Anaerobic Filter	27
UASB Reactor.....	27
Hybrid Reactor.....	28
Anaerobic Fluidized Bed Reactors	28
Anaerobic Baffled Reactor.....	28
Anaerobic Migrating Blanket Reactor.....	28
CSTR	29
Expanded Granular Sludge Bed Reactor.....	29
Internal Circulation Reactor	30
RESIDENCE TIME.....	30
FEEDSTOCKS	30
Feedstocks (Continued).....	31
END PRODUCTS.....	32
Biogas.....	32
<i>TABLE 5 TYPICAL COMPOSITION OF BIOGAS (%)</i>	32
<i>FIGURE 4 TYPICAL COMPOSITION OF BIOGAS (%)</i>	33
Post Treatment	33
• Upgrading	34
Digestate	35
Acidogenic Anaerobic Digestate	35
Methanogenic Digestate	35
Water.....	36
<i>FIGURE 5 THE BIOGAS VALUE CHAIN</i>	36
FINANCIAL REQUIREMENTS AND COSTS.....	36
FINANCIAL REQUIREMENTS AND COSTS (CONTINUED)	37
CHAPTER FOUR: MARKET BY FEED SOURCE	38

AGRICULTURE.....	38
INDUSTRIAL WASTES	39
MUNICIPAL SEWAGE	39
LANDFILLS	40
<i>TABLE 6 MARKET BY FEED SOURCE, THROUGH 2016 (\$ MILLIONS)</i>	41
<i>FIGURE 6 MARKET BY FEED SOURCE, 2000–2016 (\$ MILLIONS)</i>	41
MUNICIPAL WASTEWATER	42
AD TREATMENT OF WASTEWATER.....	42
INDUSTRIAL WASTEWATER.....	43
<i>TABLE 7 INDUSTRIAL WASTE FEEDSTOCKS FOR ANAEROBIC DIGESTION: DRY MATTER CONTENT, ORGANIC DRY MATTER CONTENT, BIOGAS YIELD, AND METHANE CONTENT</i>	44
AGRICULTURAL WASTES.....	45
<i>TABLE 8 ANIMAL WASTE FEEDSTOCKS FOR ANAEROBIC DIGESTIO: DRY MATTER CONTENT, ORGANIC DRY MATTER CONTENT, BIOGAS YIELD, AND METHANE CONTENT</i>	45
<i>TABLE 8 (CONTINUED)</i>	46
<i>TABLE 9 PERFORMANCE PARAMETERS FOR MANURE-BASED BIOGAS PLANTS</i>	46
<i>TABLE 10 ENGINEERING, EQUIPMENT AND CONSTRUCTION COSTS FOR MANURE-BASED BIOGAS PLANTS (\$)</i>	47
LANDFILL GAS.....	47
ANAEROBIC DIGESTION IN A LANDFILL.....	47
<i>TABLE 11 TYPICAL COMPOSITION OF LANDFILL BIOGAS</i>	48
<i>FIGURE 7 TYPICAL COMPOSITION OF LANDFILL BIOGAS (%)</i>	49
LANDFILL GAS TO ENERGY SYSTEMS	50
Passive Collection Systems	50
Active Collection Systems	51
CHAPTER FIVE: MARKET BY END USE.....	52
MARKET BY END USE	52
<i>TABLE 12 MARKET SIZE AND GROWTH FOR BIOGAS PRODUCTION EQUIPMENT BY END USE, THROUGH 2016 (\$ MILLIONS)</i>	53
<i>FIGURE 8 MARKET SIZE AND GROWTH FOR BIOGAS PRODUCTION EQUIPMENT BY END USE, 2000–2016 (\$ MILLIONS)</i>	53
MUNICIPAL POWER GENERATION	53
MUNICIPAL POWER GENERATION (CONTINUED).....	54
ON-SITE HEAT AND POWER GENERATION.....	55
<i>TABLE 13 EFFICIENCY COMPARISON OF ELECTRICITY ONLY PLANTS AND CHP PLANTS (%)</i>	56
<i>FIGURE 9 EFFICIENCY COMPARISON OF ELECTRICITY ONLY PLANTS AND CHP PLANTS (%)</i>	56
MOTIVE POWER	56
BENEFITS OF USING NATURAL GAS AS TRANSPORTATION FUEL	57

BENEFITS OF USING BIOMETHANE AS A TRANSPORTATION FUEL	58
GLOBAL GROWTH OF NGVS.....	58
<i>TABLE 14 GLOBAL GROWTH OF NGVS, 2000–2010 (MILLION VEHICLES)</i>	58
<i>FIGURE 10 GLOBAL GROWTH OF NGVS, 2000–2010 (MILLION VEHICLES)</i>	59
<i>TABLE 15 MARKET PENETRATION OF TOTAL VEHICLE FLEET IN COUNTRIES WITH A 1% OR GREATER NGV MARKET SHARE, 2010 (%)</i>	60
<i>FIGURE 11 MARKET PENETRATION OF TOTAL VEHICLE FLEET IN COUNTRIES WITH A 1% OR GREATER NGV MARKET SHARE, 2010 (%)</i>	61
POLICIES AND INCENTIVES FOR THE USE OF BIOMETHANE AS A TRANSPORTATION FUEL.....	61
MARKET BY WORLD REGION.....	62
MARKET BY WORLD REGION (CONTINUED).....	63
MARKET BY WORLD REGION (CONTINUED).....	64
<i>TABLE 16 MARKET SIZE AND GROWTH FOR BIOGAS PRODUCTION EQUIPMENT BY WORLD REGION, THROUGH 2016 (\$ MILLIONS)</i>	65
<i>FIGURE 12 MARKET SIZE AND GROWTH FOR BIOGAS PRODUCTION EQUIPMENT BY WORLD REGION, 2000–2016 (\$ MILLIONS)</i>	65
CHAPTER SIX: BIOGAS IN NORTH AMERICA.....	66
U.S.	66
ON-FARM BIOGAS PRODUCTION	66
MUNICIPAL WASTEWATER-DERIVED BIOGAS.....	67
INDUSTRIAL WASTE-DERIVED BIOGAS.....	67
LANDFILL GAS.....	68
BARRIERS TO THE U.S. BIOGAS MARKET.....	68
CANADA	69
MEXICO	70
<i>TABLE 17 MARKET SIZE AND GROWTH FOR BIOGAS PRODUCTION EQUIPMENT IN NORTH AMERICA, THROUGH 2016 (\$ MILLIONS)</i>	71
<i>FIGURE 13 MARKET SIZE AND GROWTH FOR BIOGAS PRODUCTION EQUIPMENT IN NORTH AMERICA, 2000–2016 (\$ MILLIONS)</i>	71
INSTALLED U.S. PLANTS BY FEED SOURCE.....	72
<i>TABLE 18 SHARE OF THE NORTH AMERICAN BIOGAS MARKET BY FEED SOURCE, 2011 (NO. OF FACILITIES/%)</i>	72
<i>FIGURE 14 SHARE OF THE NORTH AMERICAN BIOGAS MARKET BY FEED SOURCE, 2011 (%)</i>	72
U.S.	73

<i>TABLE 19 ELECTRICITY NET GENERATION FROM RENEWABLE ENERGY BY ENERGY USE SECTOR AND ENERGY SOURCE, 2004–2009 (THOUSAND KWH)</i>	73
<i>TABLE 19 (CONTINUED)</i>	74
POLICIES AND INCENTIVES	75
Existing Legislation.....	75
Failed Legislation	76
<i>TABLE 20 PROPOSED U.S. LEGISLATION THAT DID NOT PASS</i>	76
<i>TABLE 20 (CONTINUED)</i>	77
WASTEWATER DIGESTION IN THE U.S.	77
Study on Sewage Gas to Power Federal Buildings	78
<i>FIGURE 15 WASTEWATER TREATMENT PLANTS NEAR FEDERAL FACILITIES</i>	78
ON-FARM DIGESTION IN THE U.S.	79
<i>TABLE 21 U.S. FARMS REPORTING METHANE DIGESTERS, NUMBER OF DIGESTERS, METHANE PRODUCED, INSTALLATION COST, PERCENT FUNDED BY OUTSIDE SOURCES, AND YEAR OF INSTALLATION, 2009</i>	79
<i>TABLE 21 (CONTINUED)</i>	80
<i>TABLE 22 U.S. ON-FARM DIGESTERS BY STATE, 2010 (NO.)</i>	80
<i>TABLE 22 (CONTINUED)</i>	81
<i>FIGURE 16 U.S. ON-FARM DIGESTERS BY STATE, 2010 (NO.)</i>	82
<i>TABLE 23 ON-FARM BIOGAS DIGESTERS IN THE U.S., 1981-2010 (NO.)</i>	82
<i>FIGURE 17 ON-FARM BIOGAS DIGESTERS IN THE U.S. (NO.)</i>	83
<i>TABLE 24 U.S. ON-FARM DIGESTERS BY SYSTEM TYPE, 2010 (NO.)</i>	83
<i>TABLE 24 (CONTINUED)</i>	84
<i>FIGURE 18 U.S. ON-FARM DIGESTERS BY SYSTEM TYPE, 2010</i>	84
<i>FIGURE 19 ELECTRIC POWER PRODUCTION POTENTIAL FROM U.S. DIARY FARMS, BY STATE</i>	85
<i>FIGURE 20 ELECTRIC POWER PRODUCTION POTENTIAL FROM U.S. HOG FARMS, BY STATE</i>	86
Incentives for On-farm Digester Projects	87
<i>FIGURE 21 RENEWABLE PORTFOLIO STANDARDS, MAY 2010</i>	88
Incentives in California	88
<i>TABLE 25 SELF-GENERATION INCENTIVES IN CALIFORNIA</i>	89
Incentives in Vermont	89
Incentives in Other States.....	90
LANDFILL GAS-TO-ENERGY IN THE U.S.	90
Electricity Generation	90
Direct Use	91
Cogeneration.....	91
<i>TABLE 26 INSTALLED LFG AND BIOGAS CHP GENERATION CAPACITY IN THE U.S., 1970–2010 (MW)</i>	91

<i>FIGURE 22 INSTALLED LFG AND BIOGAS CHP GENERATION CAPACITY IN THE U.S., 1970–2010 (MW)</i>	92
<i>TABLE 27 INSTALLED LFG AND BIOGAS CHP GENERATION CAPACITY IN THE U.S. BY FEED SOURCE, 2010 (MW/%)</i>	92
<i>FIGURE 23 INSTALLED LFG AND BIOGAS CHP GENERATION CAPACITY IN THE U.S. BY FEED SOURCE, 2010 (%)</i>	93
Alternative Fuels	93
<i>TABLE 28 U.S. NATURAL GAS VEHICLE FUEL CONSUMPTION, 2000–2010 (FT³, MILLION)</i>	94
<i>FIGURE 24 U.S. NATURAL GAS VEHICLE FUEL CONSUMPTION, 2000–2010 (FT³, MILLION)</i>	95
<i>FIGURE 25 U.S. NATURAL GAS PIPELINE NETWORK, 2009</i>	96
U.S. LANDFILL GAS PROJECTS BY STATE	96
<i>TABLE 29 U.S. LANDFILL GAS PROJECTS AND CANDIDATE PROJECTS, DECEMBER 15, 2010 (NO.)</i>	97
<i>TABLE 29 (CONTINUED)</i>	98
Landfill Methane Outreach Program	98
<i>FIGURE 26 U.S. LANDFILL GAS PROJECTS AND CANDIDATE PROJECTS, 2010 (NO.)</i>	99
Incentives for Landfill Gas-to-Energy Projects	99
Renewable Portfolio Standards	100
<i>FIGURE 27 STATES WITH RENEWABLE PORTFOLIO STANDARDS AND STATES WITH RENEWABLE PORTFOLIO GOALS, JUNE 2010</i>	101
Net Metering	101
CANADA	102
POLICIES AND INCENTIVES	102
<i>TABLE 30 FEED-IN TARIFFS FOR BIOGAS IN ONTARIO (\$/KWH)</i>	103
MEXICO	104
POLICIES AND INCENTIVES	104
Policies and Incentives (Continued)	105
CHAPTER SEVEN: BIOGAS IN EUROPE.....	106
BIOGAS IN EUROPE.....	106
GERMANY	107
U.K.....	107
ITALY	108
FRANCE.....	108
SPAIN.....	109
BENELUX.....	109
SCANDINAVIA.....	110
OTHER COUNTRIES.....	111
<i>TABLE 31 MARKET SIZE AND GROWTH FOR BIOGAS PRODUCTION EQUIPMENT IN EUROPE, THROUGH 2016 (\$ MILLIONS)</i>	111
<i>FIGURE 28 MARKET SIZE AND GROWTH FOR BIOGAS PRODUCTION EQUIPMENT IN EUROPE, 2000–2016 (\$ MILLIONS)</i>	112

<i>TABLE 32 SHARE OF THE EUROPEAN BIOGAS MARKET BY FEED SOURCE, 2010 (NO. OF FACILITIES/%).....</i>	<i>113</i>
<i>FIGURE 29 SHARE OF THE EUROPEAN BIOGAS MARKET BY FEED SOURCE, 2010 (%).....</i>	<i>113</i>
<i>EU-WIDE POLICIES THAT SUPPORT BIOGAS</i>	<i>113</i>
<i>TABLE 33 EU AND NATIONAL RENEWABLE ENERGY TARGETS FOR 2020, AS OF 2010 (%).....</i>	<i>114</i>
<i>FIGURE 30 EU AND NATIONAL RENEWABLE ENERGY TARGETS FOR 2020, AS OF 2010 (%).....</i>	<i>115</i>
<i>EU POTENTIAL FOR BIOGAS PRODUCTION</i>	<i>116</i>
<i>TABLE 34 BIOGAS PRODUCTION POTENTIAL BY TOP 15 BIOGAS PRODUCING COUNTRIES IN THE EU BY 2020 (KTOE).....</i>	<i>117</i>
<i>FIGURE 31 BIOGAS PRODUCTION POTENTIAL BY TOP 15 BIOGAS PRODUCING COUNTRIES IN THE EU BY 2020 (KTOE).....</i>	<i>118</i>
<i>TABLE 35 EXISTING AND FORECAST BIOGAS ELECTRICITY GENERATING CAPACITY IN THE EU, 2010-2020 (NO. OF PLANTS, MW).....</i>	<i>119</i>
<i>TABLE 36 ANNUAL SLUDGE PRODUCTION BY COUNTRY, 2010 (KG DRY SOLIDS PER CAPITA).....</i>	<i>119</i>
<i>FIGURE 32 ANNUAL SLUDGE PRODUCTION BY COUNTRY, 2010 (KG DRY SOLIDS PER CAPITA).....</i>	<i>120</i>
<i>PRODUCTION OF BIOGAS IN THE EU.....</i>	<i>121</i>
<i>TABLE 37 CRUDE BIOGAS PRODUCTION IN THE EU BY COUNTRY, 2000 AND 2001 (KTOE).....</i>	<i>121</i>
<i>TABLE 37 (CONTINUED).....</i>	<i>122</i>
<i>FIGURE 33 CRUDE BIOGAS PRODUCTION IN THE EU BY COUNTRY, 2000 AND 2001 (KTOE).....</i>	<i>122</i>
<i>TABLE 38 PRIMARY ENERGY PRODUCTION OF BIOGAS IN THE EU, 2006 AND 2007 (KTOE).....</i>	<i>123</i>
<i>FIGURE 34 PRIMARY ENERGY PRODUCTION OF BIOGAS IN THE EU, 2006 AND 2007 (KTOE).....</i>	<i>124</i>
<i>TABLE 39 GROSS ELECTRICITY PRODUCTION FROM BIOGAS IN THE EU, 2006 AND 2007 (KTOE).....</i>	<i>125</i>
<i>FIGURE 35 GROSS ELECTRICITY PRODUCTION FROM BIOGAS IN THE EU, 2006 AND 2007 (KTOE).....</i>	<i>126</i>
<i>TABLE 40 PRIMARY ENERGY PRODUCTION OF BIOGAS IN THE EU, 2008 AND 2009 (KTOE).....</i>	<i>127</i>
<i>FIGURE 36 PRIMARY ENERGY PRODUCTION OF BIOGAS IN THE EU, 2008 AND 2009 (KTOE).....</i>	<i>128</i>
<i>TABLE 41 GROSS ELECTRICITY PRODUCTION FROM BIOGAS IN THE EU, 2008 AND 2009 (KTOE).....</i>	<i>129</i>
<i>FIGURE 37 GROSS ELECTRICITY PRODUCTION FROM BIOGAS IN THE EU, 2008 AND 2009 (KTOE).....</i>	<i>130</i>

<i>TABLE 42 BIOGAS PRODUCTION PER INHABITANT BY COUNTRY, 2007 AND 2009 (TOE/1,000 INHABITANTS)</i>	131
<i>FIGURE 38 BIOGAS PRODUCTION PER INHABITANT BY COUNTRY, 2007 AND 2009 (TOE/1,000 INHABITANTS)</i>	132
COUNTRY PROFILES	132
AUSTRIA.....	132
Policies and Incentives	133
<i>TABLE 43 AUSTRIAN FITS FOR ELECTRICITY FROM BIOGAS (\$/KWH)</i>	133
BELGIUM.....	134
Policies and Incentives	134
CYPRUS	135
Policies and Incentives	135
CZECH REPUBLIC	135
Policies and Incentives	136
DENMARK.....	136
<i>TABLE 44 BIOGAS PRODUCTION PLANTS IN DENMARK BY FEED SOURCE, 2010 (NO.)</i>	137
<i>FIGURE 39 BIOGAS PRODUCTION PLANTS IN DENMARK BY FEED SOURCE, 2010 (NO.)</i>	137
Policy and Incentives.....	138
<i>TABLE 45 BIOGAS PRODUCTION IN DENMARK BY FEED MATERIAL TYPE, 2000-2010 (PJ/YR)</i>	138
<i>FIGURE 40 BIOGAS PRODUCTION IN DENMARK BY FEED MATERIAL TYPE, 2000-2010 (PJ/YR)</i>	139
ESTONIA.....	140
Policies and Incentives	140
FINLAND	140
<i>TABLE 46 BIOGAS PRODUCTION PLANTS IN FINLAND BY FEED SOURCE, 2010 (NO./%)</i>	141
<i>FIGURE 41 BIOGAS PRODUCTION PLANTS IN FINLAND BY FEED SOURCE, 2010 (%)</i>	141
<i>TABLE 47 BIOGAS PRODUCTION POTENTIAL IN FINLAND BY 2015 (TWH)</i>	142
<i>FIGURE 42 BIOGAS PRODUCTION POTENTIAL IN FINLAND BY 2015 (TWH)</i>	143
Policies and Incentives	143
FRANCE.....	143
<i>TABLE 48 BIOGAS PLANTS IN FRANCE BY FEED SOURCE, 2010 (NO.)</i>	144
<i>FIGURE 43 BIOGAS PLANTS IN FRANCE BY FEED SOURCE, 2010 (NO.)</i>	144
Policies and Incentives	145
<i>TABLE 49 PROPOSED FEED-IN TARIFFS IN FRANCE (\$/KWH)</i>	145

GERMANY	146
TABLE 50 GERMAN BIOGAS PLANTS BY WASTE TYPE, 2010 (NO.).....	146
FIGURE 44 GERMAN BIOGAS PLANTS BY WASTE TYPE, 2010 (NO.).....	147
TABLE 51 BIOGAS PLANTS IN GERMANY, 1992–2010 (NO., MW).....	148
FIGURE 45 BIOGAS PLANTS IN GERMANY, 1992–2010 (NO.)	148
Policies and Incentives	148
TABLE 52 GERMAN FEED IN TARIFFS FOR BIOGAS ENERGY	
(\$/KWH).....	149
Challenges.....	149
Ongoing R&D.....	150
GREECE.....	150
Policies and Incentives	151
HUNGARY	151
TABLE 53 BIOGAS PRODUCTION POTENTIAL IN HUNGARY BY	
FEED SOURCE (TWH, %).....	152
FIGURE 46 BIOGAS PRODUCTION POTENTIAL IN HUNGARY BY	
FEED SOURCE (%).....	152
Policies and Incentives	152
IRELAND	153
TABLE 54 BIOGAS PLANTS IN IRELAND BY TYPE, 2010 (NO./%)	153
FIGURE 47 BIOGAS PLANTS IN IRELAND BY TYPE, 2010 (%).....	154
TABLE 55 BIOGAS AND METHANE POTENTIAL FROM FARM	
SLURRIES AND SLAUGHTER WASTES IN IRELAND, 2010 AND	
2020	154
FIGURE 48 BIOGAS AND METHANE POTENTIAL FROM FARM	
SLURRIES AND SLAUGHTER WASTES IN IRELAND, 2020 (MMN ³).....	155
Policies and Incentives	155
TABLE 56 FEED-IN TARIFFS FOR BIOGAS SUPPORT IRELAND	
(\$/KWH).....	155
ITALY	156
TABLE 57 BIOGAS PRODUCTION IN ITALY BY FEED SOURCE, 2010	
(%).....	157
FIGURE 49 BIOGAS PRODUCTION IN ITALY BY FEED SOURCE,	
2010 (%).....	157
TABLE 58 BIOGAS PRODUCTION POTENTIAL IN ITALY BY FEED	
SOURCE (MILLION MT/YR, %)	158
FIGURE 50 BIOGAS PRODUCTION POTENTIAL IN ITALY BY FEED	
SOURCE (%).....	158
Policies and Incentives	159
TABLE 59 ITALIAN FEED-IN TARIFFS FOR BIOGAS PRODUCTION	
(\$/KWH).....	159
LATVIA.....	159
TABLE 60 BIOGAS PRODUCTION POTENTIAL IN LATVIA BY FEED	
SOURCE (MILLION M ³ /YR, %).....	160

<i>FIGURE 51 BIOGAS PRODUCTION POTENTIAL IN LATVIA BY FEED</i>	
<i>SOURCE (%)</i>	161
Policies and Incentives	161
LITHUANIA.....	161
Policies and Incentives	162
LUXEMBOURG	162
Policies and Incentives	162
THE NETHERLANDS.....	163
Policies and Incentives	163
<i>TABLE 61 DUTCH PRICE SUPPORTS FOR BIOGAS PRODUCTION (\$)</i>	164
NORWAY.....	164
<i>TABLE 62 END USE OF BIOGAS IN NORWAY, 2010 (%)</i>	165
<i>FIGURE 52 END USE OF BIOGAS IN NORWAY, 2010 (%)</i>	165
<i>TABLE 63 POTENTIAL ENERGY PRODUCTION IN NORWAY BY</i>	
<i>WASTE RESOURCES AND BY-PRODUCTS (%)</i>	166
<i>FIGURE 53 POTENTIAL ENERGY PRODUCTION IN NORWAY BY</i>	
<i>WASTE RESOURCES AND BY-PRODUCTS (%)</i>	166
Policies and Incentives	167
POLAND.....	167
<i>TABLE 64 BIOGAS PRODUCTION PLANTS IN POLAND BY FEED</i>	
<i>SOURCE AND END USE, 2010 (NO., MW)</i>	168
<i>FIGURE 54 BIOGAS PRODUCTION PLANTS IN POLAND BY FEED</i>	
<i>SOURCE AND END USE, 2010 (NO.)</i>	168
Policies and Incentives	169
PORTUGAL.....	169
Policies and Incentives	169
ROMANIA	170
Policies and Incentives	170
SLOVAKIA	170
Policies and Incentives	171
SLOVENIA.....	171
<i>TABLE 65 BIOGAS PRODUCTION IN SLOVENIA BY FEED SOURCE,</i>	
<i>2009 (NO., %)</i>	171
<i>FIGURE 55 BIOGAS PRODUCTION IN SLOVENIA BY FEED SOURCE,</i>	
<i>2009 (%)</i>	172
Policies and Incentives	172
SPAIN	173
<i>TABLE 66 BIOGAS PRODUCTION POTENTIAL IN SPAIN BY FEED</i>	
<i>SOURCE</i>	173
<i>FIGURE 56 BIOGAS PRODUCTION POTENTIAL IN SPAIN BY FEED</i>	
<i>SOURCE (M³/YEAR)</i>	174
Policies and Incentives	174
SWEDEN	175

TABLE 67 BIOGAS PRODUCTION IN SWEDEN BY FEED SOURCE, 2010 (NO./%)	175
FIGURE 57 BIOGAS PRODUCTION IN SWEDEN BY FEED SOURCE, 2010 (%)	176
TABLE 68 END USES FOR BIOGAS IN SWEDEN, 2010 (%)	176
FIGURE 58 END USES FOR BIOGAS IN SWEDEN, 2010 (%)	177
TABLE 69 NATURAL GAS/BIOGAS FILLING STATIONS IN SWEDEN, 1995–2010 (NO.)	178
FIGURE 59 NATURAL GAS/BIOGAS FILLING STATIONS IN SWEDEN, 1995–2010 (NO.)	178
TABLE 70 AMOUNTS OF VEHICLE GAS SOLD, 1995–2009 (1,000 M ³)	179
FIGURE 60 AMOUNTS OF VEHICLE GAS SOLD, 1995–2009 (1,000 M ³)	179
Policies and Incentives	180
SWITZERLAND	180
Policies and Incentives	181
U.K.	181
TABLE 71 BIOGAS PRODUCTION PLANTS IN THE U.K. BY FEED SOURCE, 2009 (NO.)	181
FIGURE 61 BIOGAS PRODUCTION PLANTS IN THE U.K. BY FEED SOURCE, 2009 (NO.)	182
TABLE 72 BIOGAS CAPACITY IN THE U.K., OPERATIONAL, IN- BUILD, AND IN PLANNING STAGES, 2010 (MT)	182
FIGURE 62 BIOGAS CAPACITY IN THE U.K., OPERATIONAL, UNDER CONSTRUCTION, AND IN PLANNING STAGES, 2010 (MT)	183
TABLE 73 TOTAL METHANE PRODUCTION FROM AD IN THE U.K., 2010	183
FIGURE 63 TOTAL METHANE PRODUCTION FROM AD IN THE U.K. BY FEED SOURCE, 2010 (TOE)	184
TABLE 74 BIOGAS PRODUCTION POTENTIAL IN THE U.K. (MT/YR, %)	184
TABLE 74 (CONTINUED)	185
FIGURE 64 BIOGAS PRODUCTION POTENTIAL IN THE U.K. BY FEED SOURCE (DRY MT/YR)	185
Policies and Incentives	185
TABLE 75 ENERGY PRODUCED UNDER ROCS IN THE U.K., 2005- 2009 (GWH)	186
THE COMMONWEALTH OF INDEPENDENT STATES	187
Biogas Production Potential in Russia	187
Biogas Production Potential ... (Continued)	188
CHAPTER EIGHT: BIOGAS IN ASIA	189
CHINA	189
CHINA (CONTINUED)	190
INDIA	191
JAPAN	192

OTHER COUNTRIES.....	193
<i>TABLE 76 MARKET SIZE AND GROWTH FOR BIOGAS PRODUCTION EQUIPMENT IN ASIA, THROUGH 2016 (\$ MILLIONS)</i>	193
<i>FIGURE 65 MARKET SIZE AND GROWTH FOR BIOGAS PRODUCTION EQUIPMENT IN ASIA, 2000–2016 (\$ MILLIONS)</i>	194
CHINA.....	194
POLICIES AND INCENTIVES.....	194
INDIA.....	195
POLICIES AND INCENTIVES.....	196
JAPAN.....	196
POLICIES AND INCENTIVES.....	197
EMERGING ASIA.....	197
<i>TABLE 77 DOMESTIC BIOGAS PLANTS INSTALLED THROUGH SNV IN EMERGING ASIA, 2008–2010 (NO.)</i>	198
<i>FIGURE 66 DOMESTIC BIOGAS PLANTS INSTALLED THROUGH SNV IN EMERGING ASIA, 2008–2010</i>	198
NEPAL.....	199
Policies and Incentives.....	199
VIETNAM.....	199
Policies and Incentives.....	199
BANGLADESH.....	200
Policies and Incentives.....	200
CAMBODIA.....	200
Policies and Incentives.....	201
LAO PDR.....	201
Policies and Incentives.....	201
PAKISTAN.....	202
Policies and Incentives.....	202
INDONESIA.....	202
Policies and Incentives.....	203
OTHER COUNTRIES.....	203
CHAPTER NINE: BIOGAS IN AFRICA.....	204
BIOGAS IN AFRICA.....	204
<i>TABLE 78 MARKET SIZE AND GROWTH FOR BIOGAS PRODUCTION EQUIPMENT IN AFRICA, THROUGH 2016 (\$ MILLIONS)</i>	205
<i>FIGURE 67 MARKET SIZE AND GROWTH FOR BIOGAS PRODUCTION EQUIPMENT IN AFRICA, 2000–2016 (\$ MILLIONS)</i>	206
<i>TABLE 79 DOMESTIC BIOGAS PLANTS IN AFRICA BUILT UNDER THE AFRICA BIOGAS PARTNERSHIP PROGRAM, 2007–2011</i>	207
<i>FIGURE 68 DOMESTIC BIOGAS PLANTS IN AFRICA BUILT UNDER THE AFRICA BIOGAS PARTNERSHIP PROGRAM, 2010–2011 (NUMBER OF FACILITIES)</i>	207
ETHIOPIA.....	208
POLICIES AND INCENTIVES.....	208

KENYA	208
POLICIES AND INCENTIVES	209
RWANDA	209
POLICIES AND INCENTIVES	210
TANZANIA.....	210
POLICIES AND INCENTIVES.....	210
UGANDA.....	211
POLICIES AND INCENTIVES.....	211
OTHER COUNTRIES.....	211
CHAPTER TEN: BIOGAS IN LATIN AMERICA	212
BIOGAS IN LATIN AMERICA	212
<i>TABLE 80 MARKET SIZE AND GROWTH FOR BIOGAS PRODUCTION</i>	
<i>EQUIPMENT IN LATIN AMERICA, THROUGH 2016 (\$ MILLIONS)</i>	<i>213</i>
<i>FIGURE 69 MARKET SIZE AND GROWTH FOR BIOGAS</i>	
<i>PRODUCTION EQUIPMENT IN LATIN AMERICA, 2000–2016 (\$</i>	
<i>MILLIONS).....</i>	<i>213</i>
ARGENTINA.....	214
POLICIES AND INCENTIVES.....	214
BRAZIL.....	215
POLICIES AND INCENTIVES.....	215
CHILE	216
<i>TABLE 81 BIOGAS PRODUCTION POTENTIAL IN CHILE BY FEED</i>	
<i>SOURCE.....</i>	<i>216</i>
<i>FIGURE 70 BIOGAS PRODUCTION POTENTIAL IN CHILE BY FEED</i>	
<i>SOURCE (THOUSANDS M³/YEAR).....</i>	<i>217</i>
POLICIES AND INCENTIVES.....	217
CHAPTER ELEVEN: INDUSTRY STRUCTURE.....	218
INDUSTRY STRUCTURE	218
COMPANY PROFILES	219
AAT GMBH & CO.	220
ADI SYSTEMS, INC.	220
AGROENERGIEN MEINERS.....	221
AMERESCO, INC.	221
AREVA RENEWABLES	222
ARROWBIO.....	222
AXPO KOMPOGAS AG	223
BEDMINSTER INTERNATIONAL	224
BEKON.....	224
BIOGAS ENERGY, INC.	225
BIOGAS NORD	226
BIOGAS POWER	226
BIOGAS TECHNOLOGY LTD.....	227
BIOGEN GREENFINCH.....	227

BIOTHANE	228
BIOVAKKA OY	228
BRUECKNER BIOTEC	229
BTA INTERNATIONAL	229
BURNS & MCDONNELL.....	230
BWSC BURNMEISTER & WAIN	230
CARGILL, INC.	230
CCI BIOENERGY, INC.	231
CHEVRON ENERGY SOLUTIONS.....	231
CITEC INTERNATIONAL, LTD. OY	232
CLEAR HORIZONS	232
DMK INGERIERIA, S.L.	232
EA ENGINEERING, SCIENCE, AND TECHNOLOGY	233
EBARA CORP.	233
ECOCORP, INC.	233
ECOLAB.....	234
EGGERSMANN	234
ENBASYS GMBH	235
ENPURE, LTD.	235
ENTEC BIOGAS GMBH.....	236
ENVIRO CONTROL, LTD.	236
ENVIRONMENTAL ENERGY ENGINEERING CO. (E3).....	237
ENVIRONMENTAL PRODUCTS & TECHNOLOGY CORP. (EPT).....	237
ENVITEC BIOGAS	238
FARMATIC BIOTECH ENERGY AG	238
GENERAL ELECTRIC CO.....	239
GHD, INC.	239
GOODTECH ASA.....	240
GUASCOR	240
HAASE ENERGIETECHNIC GMBH	240
HIRAD, LTD.....	241
INTREPID TECHNOLOGY AND RESOURCES	241
KRIEG & FISCHER INGENIEURE GMBH	242
KRUGER, INC.....	242
MONSAL, LTD.....	243
MWH ENERGY SOLUTIONS.....	243
MWK BIOGASANLAGEN ROSENHEIM GMBH.....	244
NAHTEC.....	244
NIRAS	245
ORGANIC WASTE SYSTEMS (OWS)	245
OVIVO	246
PAQUES BV	246
PRESECO OY.....	247

PRO-ACT MICROBIAL, INC.....	248
RCM INTERNATIONAL	248
REPUBLIC SERVICES, INC.	249
ROEDIGER BIOENERGIE GMBH.....	249
ROS ROCA ENVIROTEC	250
SANSUY	250
SCHMACK BIOGAS AG.....	251
SCHWARTING BIOSYSTEM GMBH	251
SCS ENGINEERS	252
SIEMENS AG	253
SINTEX INDUSTRIES, LTD.....	253
STRABAG UMWELTANLAGEN GMBH	254
SUEZ ENVIRONNEMENT	254
TAKUMA CO, LTD.	255
UEM GROUP	255
UTS BIOGASTECHNIK GMBH	256
VALORGA INTERNATIONAL S.A.S.	257
WABIO BIOENERGIETECHNIK GMBH	257
WASTE ENERGY SOLUTIONS, LLC	258
WASTE MANAGEMENT	258
WEHRLE WERK AG	258
WELTEC BIOPOWER GMBH	259
ZORG BIOGAS AG.....	259
Zorg Biogas AG (Continued)	260