

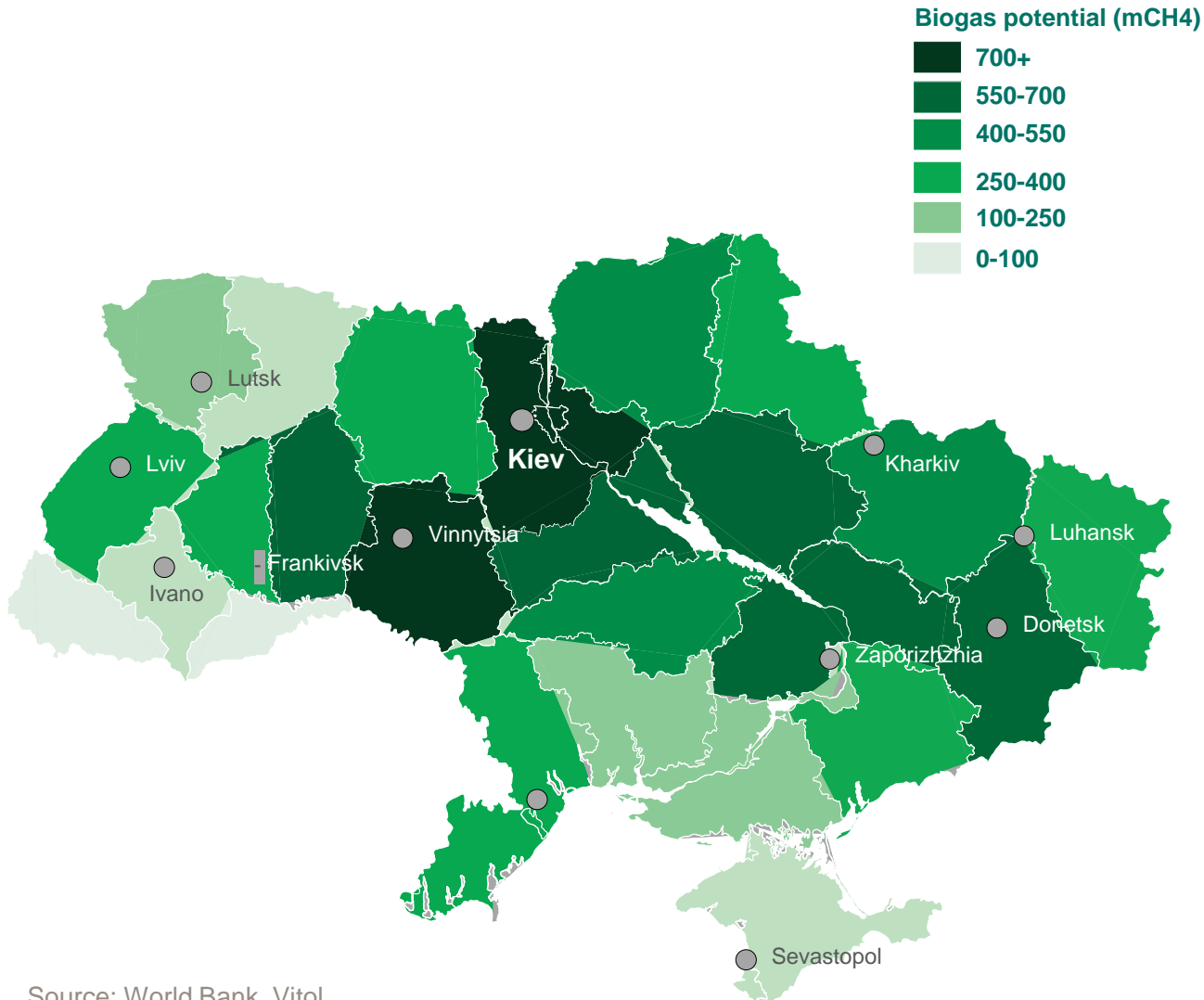


## UKRAINE – Biomethane potential

Lifting foreign direct investment by opening export opportunities

# Ukraine biogas: the exciting energy resource for the country

The war is the only deterrent currently limiting the investment potential in the country



**A** The Biogas Fairway

**B** Transport infrastructure

**C** Savvy commercial players

**D** Maturing regulatory framework

## Very large potential

- 9.7 billion m<sup>3</sup>CH<sub>4</sub>/year potential
- Target of 1.0 billion m<sup>3</sup>/year in 2030 and 4.5 billion m<sup>3</sup>/year in 2050 is conservative

## Ready infrastructure

- Highly developed natural gas supply network

## High performing agri sector

- Number of large sophisticated commercial organisations
- Able to engage with complex commercial negotiation

## A regulator eager to help

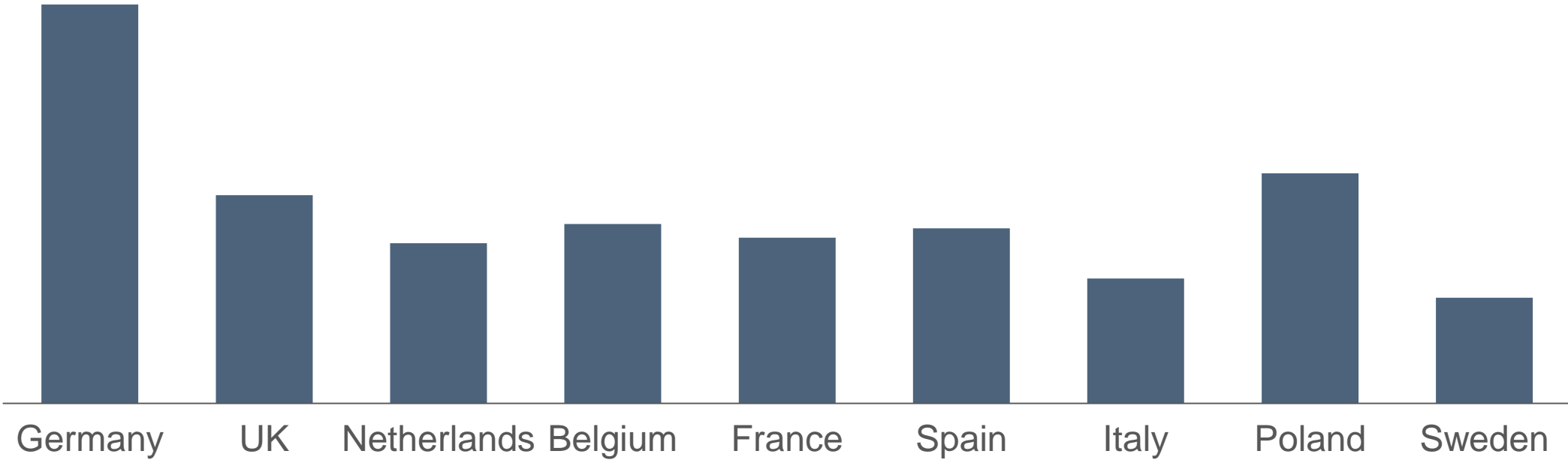
- 3Q/2021, Law No. 1820-IX & Government Resolution No. 823 : setup of GOO and a biogas registry
- 05/23: new rules for injecting biomethane into gas grid
- 06/23: NKRE mass balancing between national and regional grids allowed



# What is the best market for Ukrainian biogas

Price of biogas under RED II/III

15% manure / 85% crop by gas output; €/ton



# What barriers do Ukrianian producers have to overcome?

Several pieces missing, none of which pose material conceptual challenges or is complex from the regulatory and legal point of view.

