



**Canadian
Biogas
Association**



Biogas Market Overview and Outlook in Canada

Biogas Window – March 3, 2021

Who We Are

The **Canadian Biogas Association** is the voice of *Biogas* and *Renewable Natural Gas* opportunities across Canada.

Speaking for over 150 farmers, municipalities, utilities, technology developers, consultants, finance and insurance firms, and other organizations committed to reaching Canada's biogas and RNG potential.

www.biogasassociation.ca



Biogas and RNG Production and Potential in Canada

Building the Biogas Sector With You

Canada's Quiet Achiever

Operating Biogas and RNG Projects in Canada



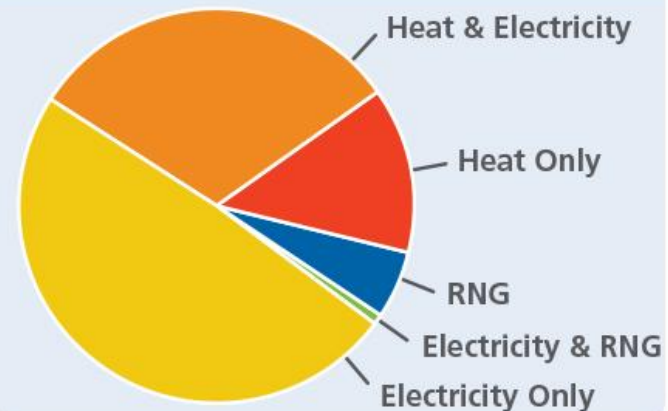
Biogas and RNG Energy Capacity

Operational and initiated projects generate:

Greater than
196 MW

Greater than
& 5,000,000 GJ
from RNG

Biogas Energy Utilization



Policy Drivers in Canada

FEDERAL

- Clean Fuel Standard achieving 30MT reductions by 2030

BRITISH COLUMBIA

- CleanBC Climate Plan 15% renewable content by 2030
- GHG targets – reduce CI by 40% (diesel) and 20% (gasoline) by 2030
- FortisBC RNG program (up to \$30/GJ)
- 95% organics diversion

ALBERTA

- Climate Leadership Plan
- Renewable energy incentives for small scale
- Technology Innovation and Emission Reduction (TIER) Program

ONTARIO

- Made-in-Ontario Plan
- GHG targets: 15% in 2020; 37% in 2030; 80% in 2050 from 1990 levels
- Voluntary RNG Program
- Food and Organic Policy Statement
- Nutrient Management regulations

QUEBEC

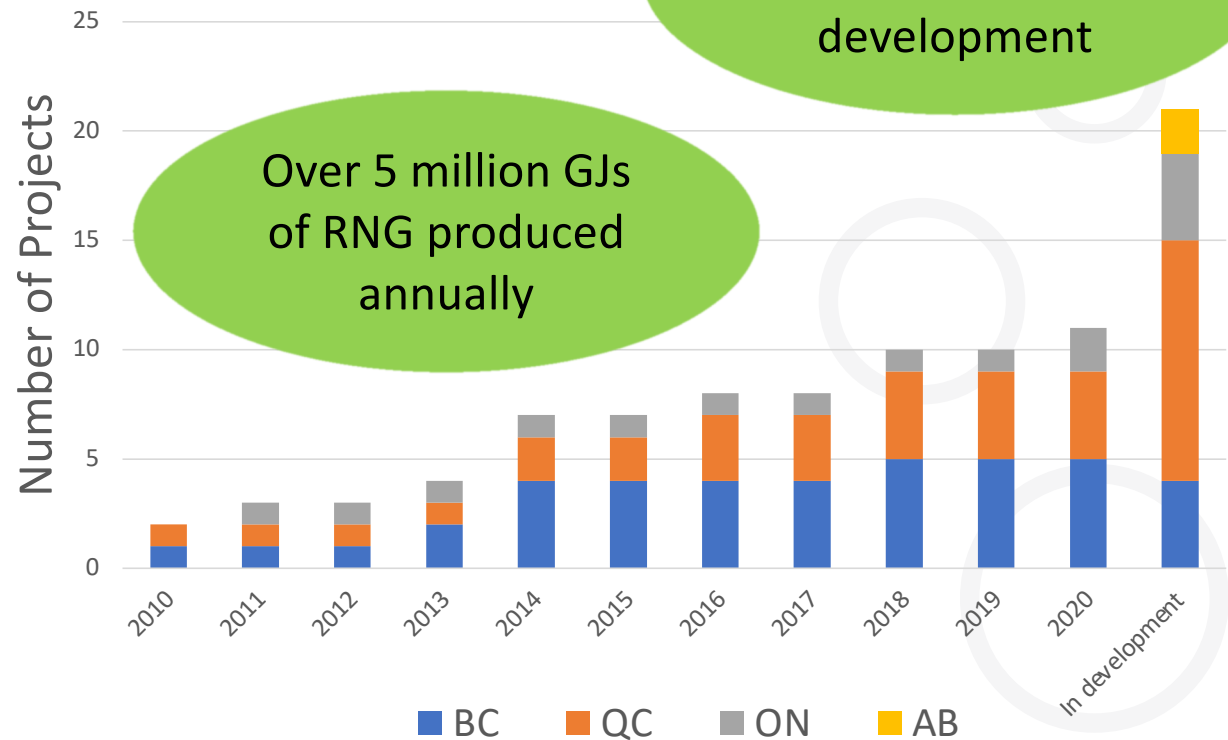
- RNG regulation: 1% RNG by 2020 increased to 5% by 2025
- Energir RNG Program (\$7-22/GJ)
- 85% waste diversion by 2030
- \$70M for RNG up to 2022

RNG Programs in Canada

Province	Date of RNG Program	Cost per GJ	Number of Projects
British Columbia	2007	Up to \$30	5 (4 in development)
Quebec	2017	\$7-22	4 (11 in development)
Ontario	Voluntary RNG Program approved on a pilot basis	TBD	2 (others expected soon)

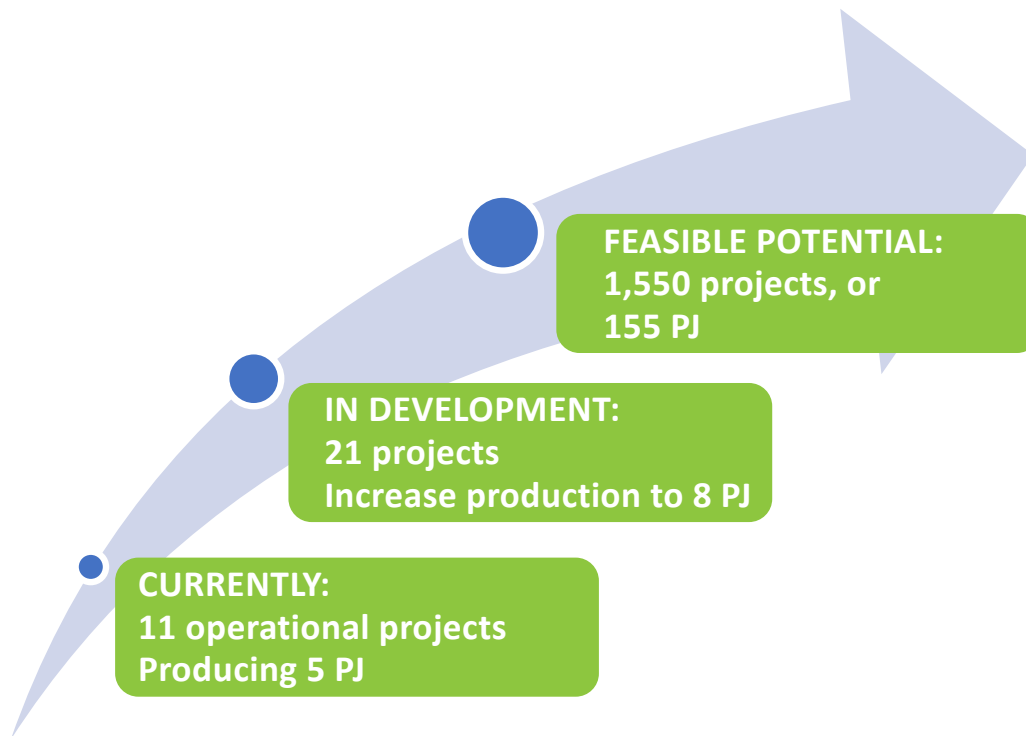


RNG Projects in Canada

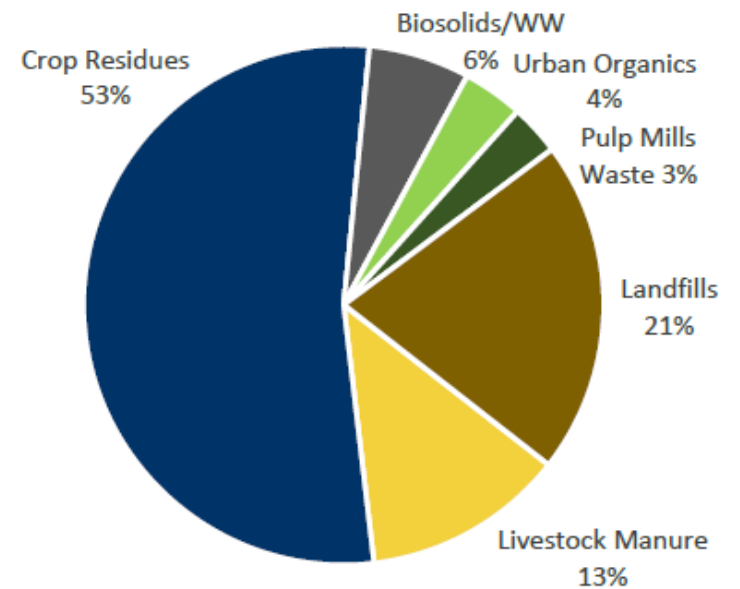


Building the Biogas Sector With You

RNG Potential in Canada



Feasible RNG Potential (155 PJ/yr)



TorchLight Bioresources "RNG Feedstock Potential, March 2020"

Barriers to Investment and Development

RISK

LOW	LOW	MEDIUM	MEDIUM	HIGH	HIGHEST
Project Financing	Technology Performance	Municipal and Provincial Permitting	Pipeline Connection and Implications Between Provincial Utilities and Regulators	Feedstock and Reliability of Supply	Policy Uncertainty

Building the Biogas Sector With You



Unlocking the Value of Biogas/RNG in Canada

- Tangible Goals
 - Renewable gas content requirement, strategy, targets
 - Simplified regulatory and approvals processes
- Strong Market Pull
 - Reasonable and stable gov't policy and programs to support sustainable, long-term product demand
 - Securing stable revenue streams for projects
- Clear Market Mechanisms
 - Well-defined approach that sends strong signal and enables broad participation by industry
 - Increased public awareness of biogas and recovering value from organics





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Thank You!

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