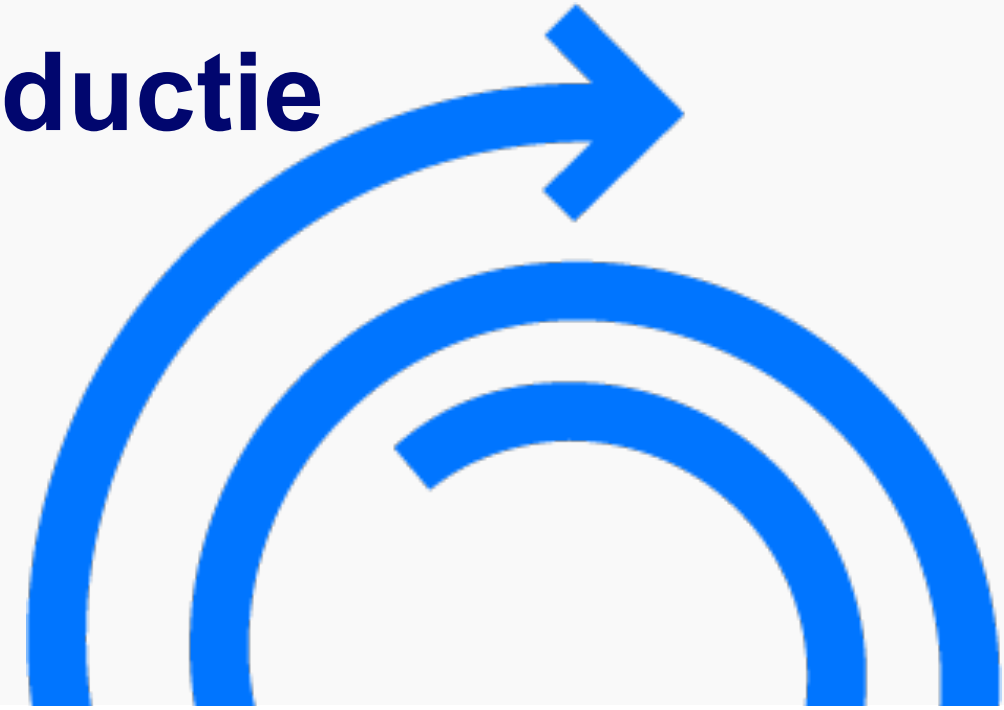
Platform
Hernieuwbare
Brandstoffen.

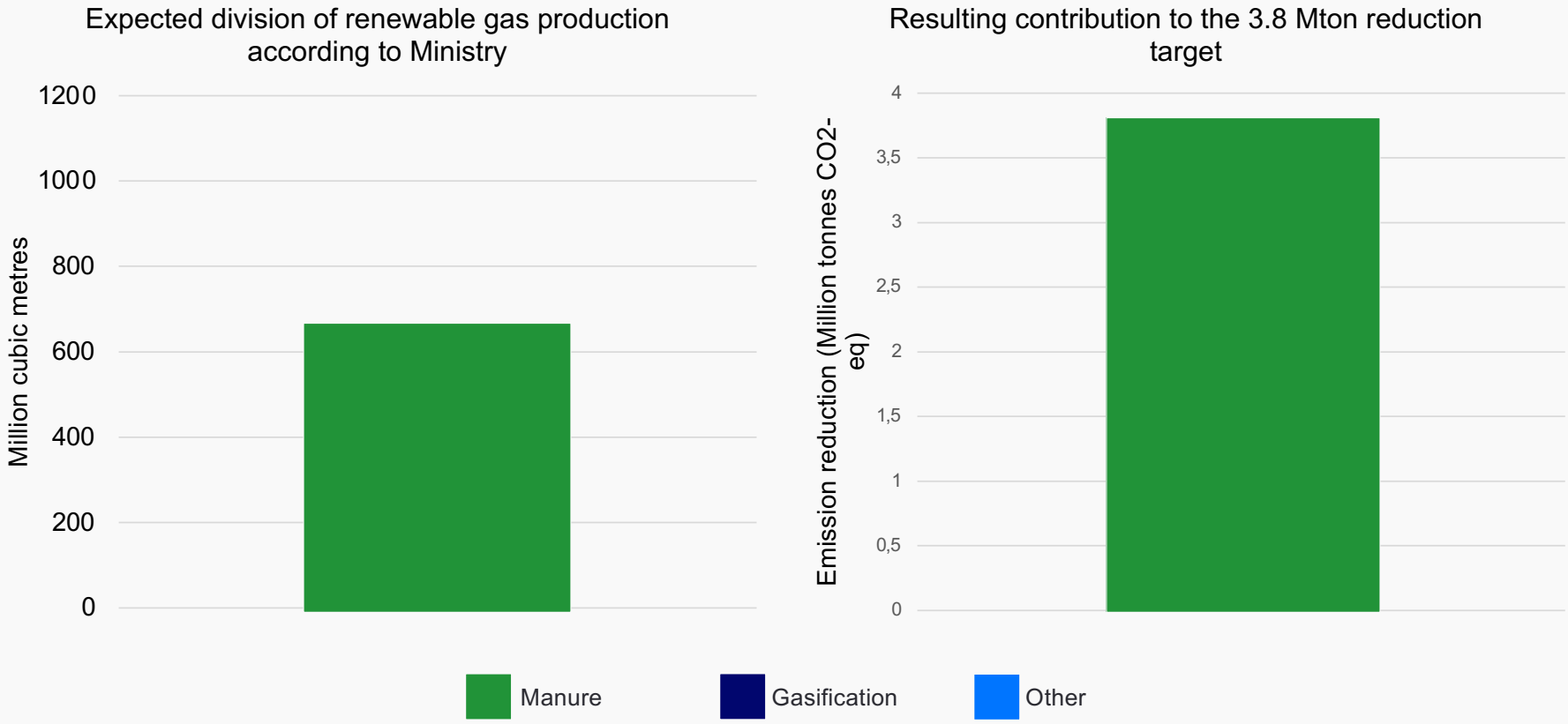
Geïntegreerde productie



NETWERKEVENT Green Molecules
Collective HERFST 2025

Loes Knotter

Fulfillment of 2030 emission reduction target (3.8 Mton CO_2-eq) with only manure realises much lower renewable methane volumes



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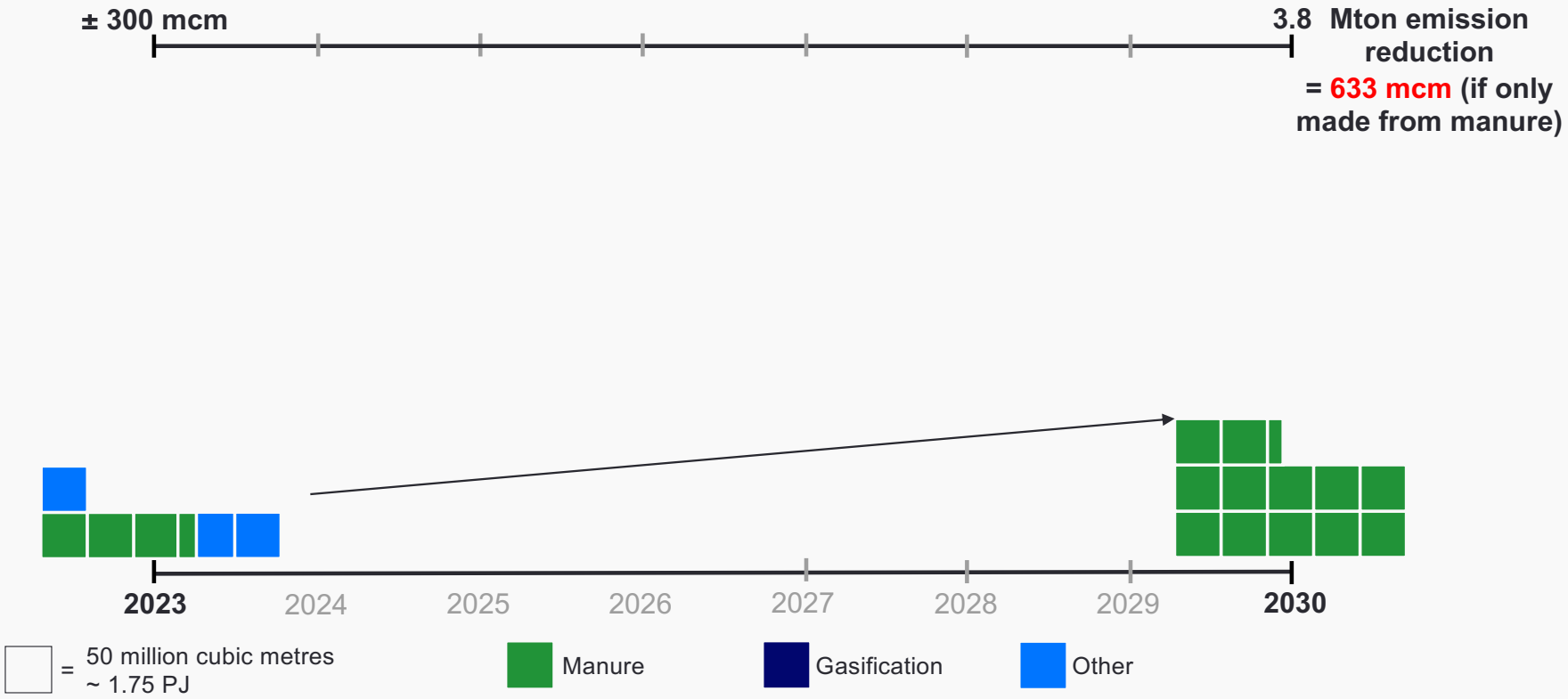
Sources: Own analysis, based on latest policy output (Kamerbrief aanpassingen bijmengverplichting, 2024)

Emission reduction target can be reached only with manure and with much less renewable methane produced



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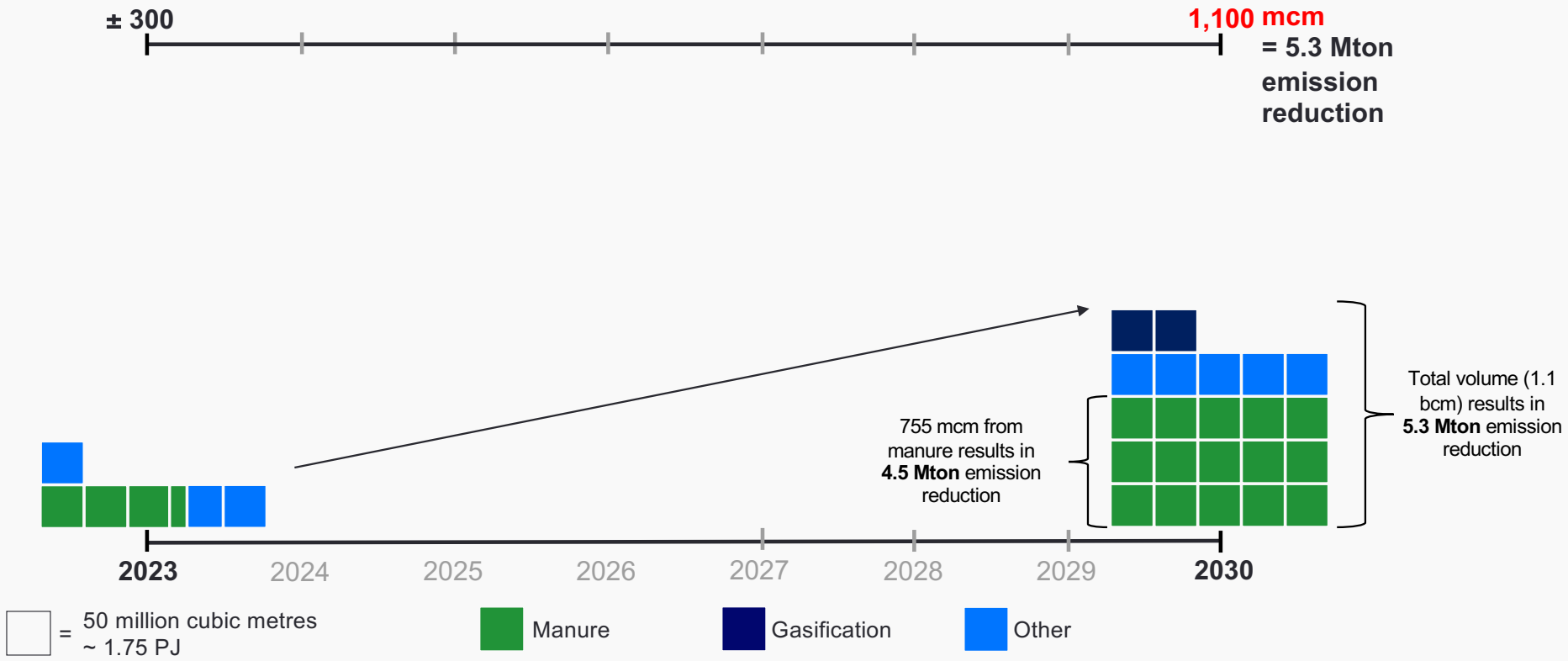
Sources: Own analysis, based on CE Delft (2024) en latest policy output (Kamerbrief aanpassingen bijmengverplichting, 2024)

A volume based target of 1.1 bcm would have reached much higher emission reduction



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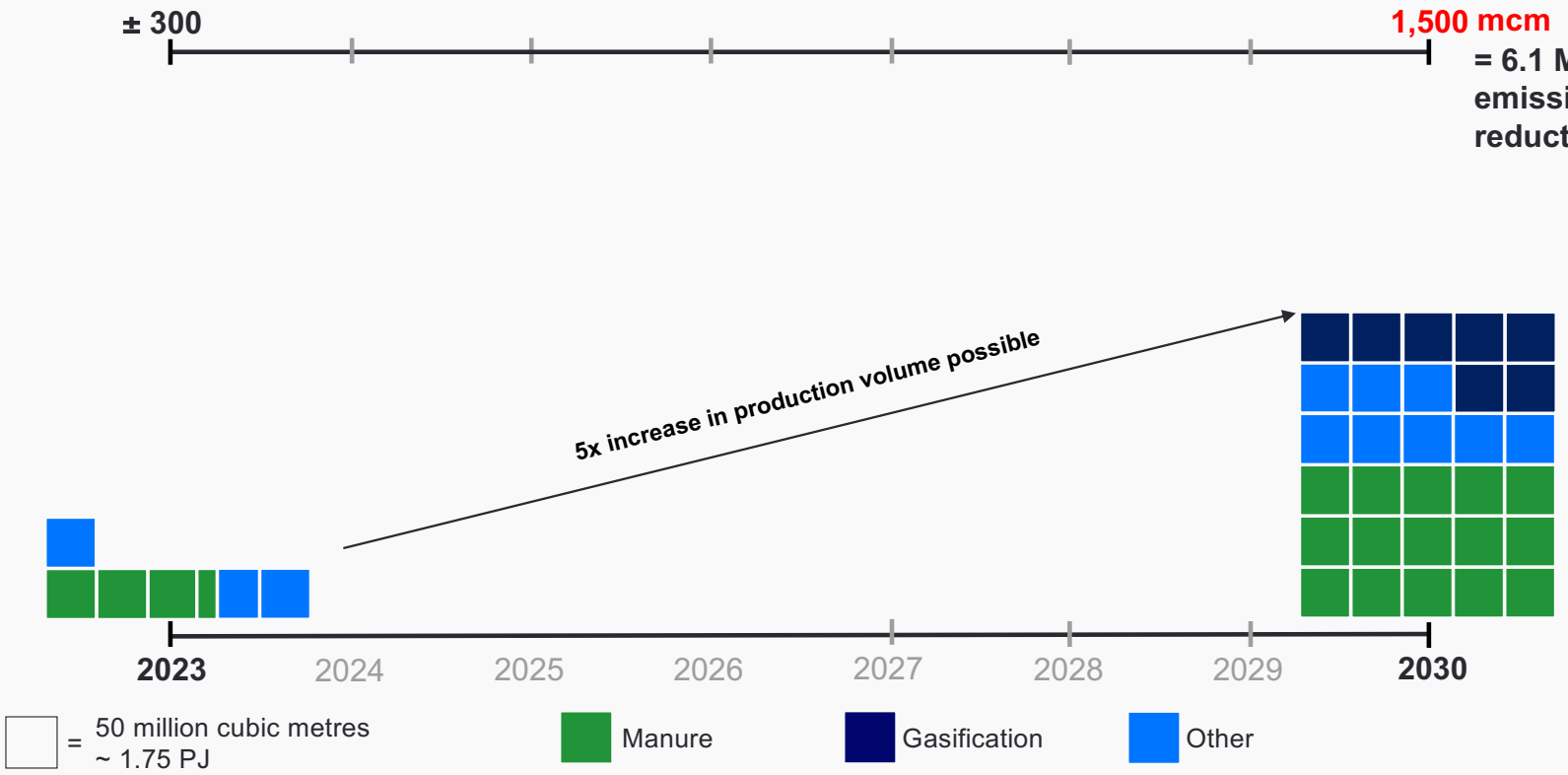
Sources: Own analysis, based on CE Delft (2024) en latest policy output (Kamerbrief aanpassingen bijmengverplichting, 2024)

Higher targets and submandates can unlock the gasification potential and further increase the renewable methane production



* Economic potential subject to high uncertainty. Technical potential 5 bcm with much higher certainty (CE Delft, 2024)

Sources: Own analysis, based on CE Delft (2024) en latest policy output (Kamerbrief aanpassingen bijmengverplichting, 2024)

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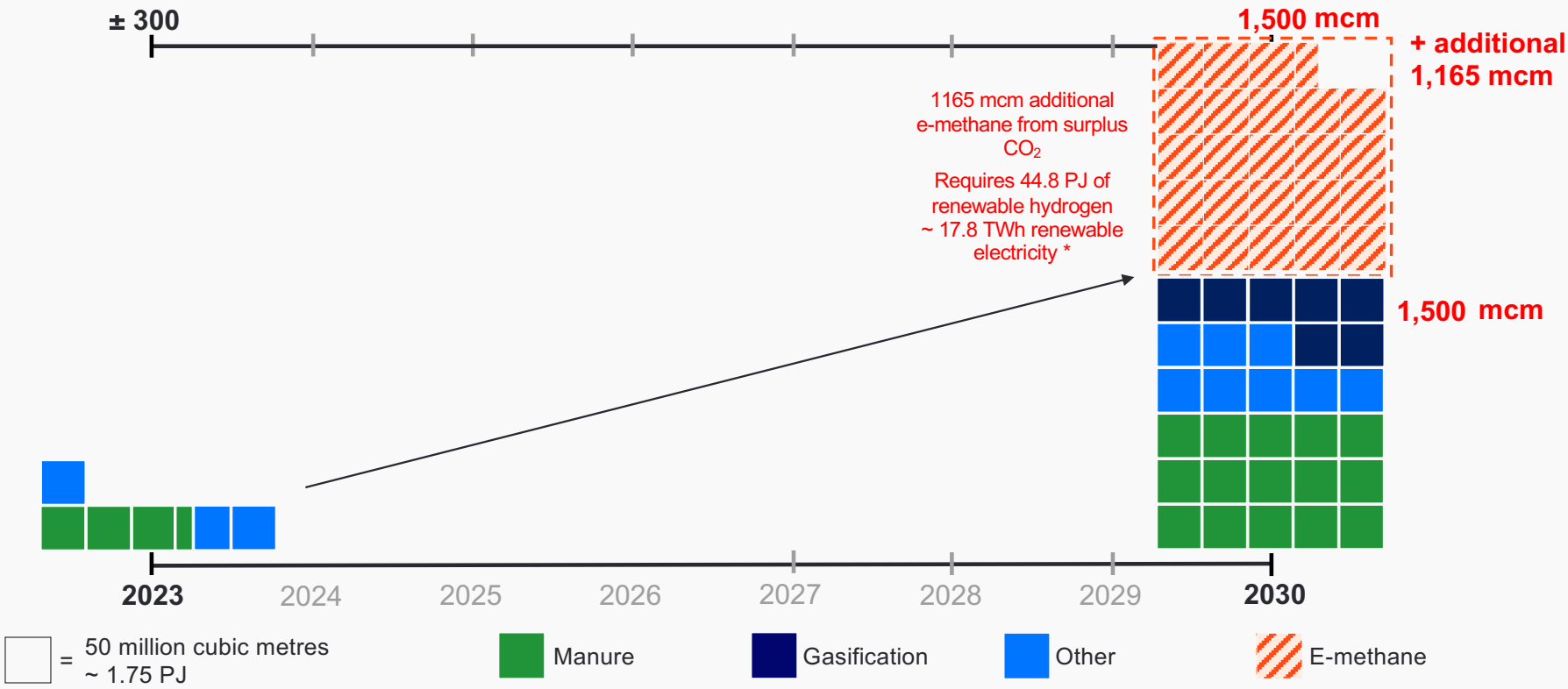
Potential for an additional 1,165 mcm of e-methane from surplus CO_2



* Concerns about 20% of the total renewable electricity production capacity foreseen for 2030

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Sources: Own analysis, based on CE Delft (2024) en latest policy output (Kamerbrief aanpassingen bijmengverplichting, 2024)

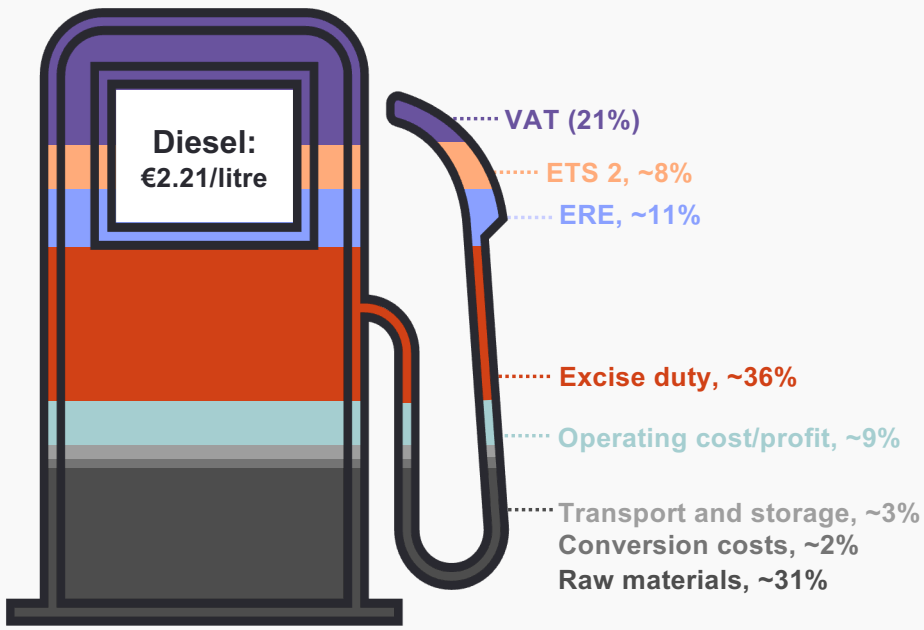
Mogelijk bonnetje met de brandstofprijs aan de pomp in 2030

Breaking down the diesel (EN 590 spec) pump price for Dutch road sector in the base-case scenario*

(mogelijk) bonnetje

Year: 2030
Fuel: Diesel (EN 590 spec)
Quantity: 1 litre

Raw materials,	€0.57
Conversion costs,	€0.03
Transport and storage,	€0.05
Operating costs/profit,	€0.17
Excise duty,	€0.65
ERE,	€0.20
ETS 2,	€0.15
VAT 21%,	€0.36
Final pump price,	**€2.21**



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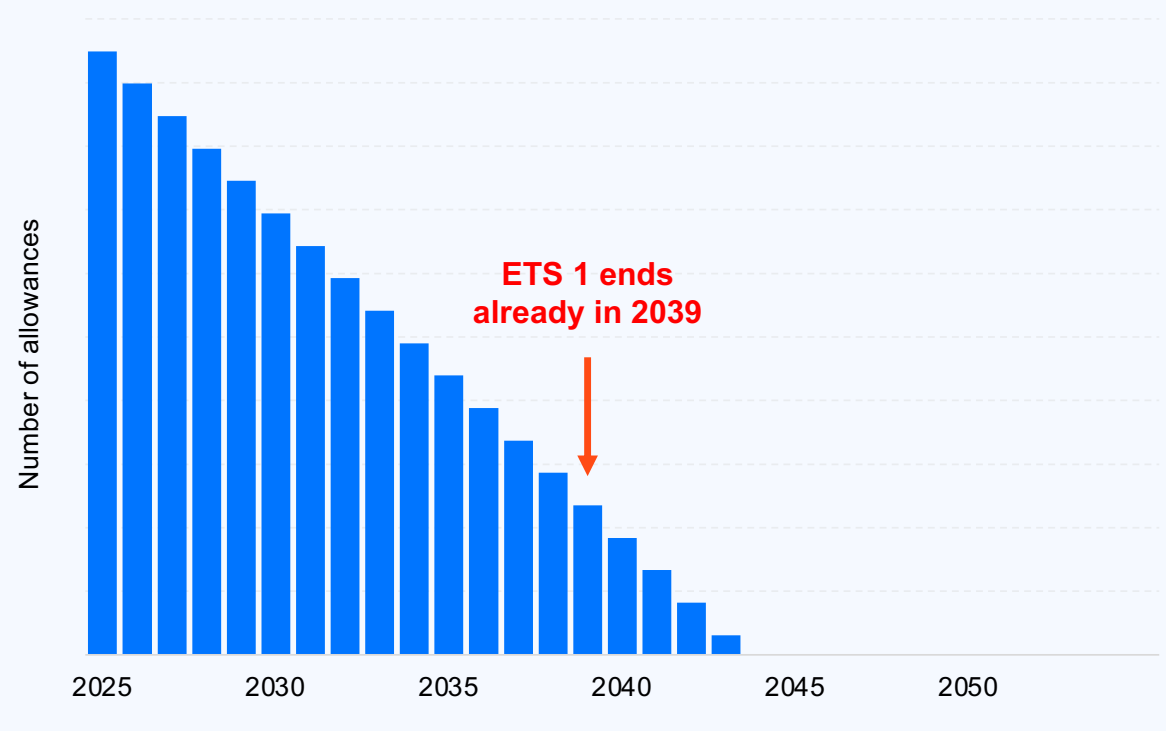
*Diesel pump price in 2030 is an estimate based on current price level (based on CBS 2024 average pump price data) with additional inclusion of estimated ERE and ETS 2 prices.
In the base-case scenario it is assumed that the cost for raw materials, transport and storage, conversion cost and operating profit remain constant until 2030, based on values presented in CE Delft (2025), Prijseffecten ERE-systematiek.
It is also assumed that the level of excise increases to €0.65/litre by 2030 and VAT level remains at 21%.
It has been assumed that the cost of purchasing EREs and ETS 2 is fully passed on to end consumers | The price of EREs is an estimate based on the annual obligation targets as reported by Min I&W (April 2025), Implementation letter RED III, Annex 1 and conversion value set by NEa (47kg/HBE) at a value of €10/GJ | In the base case scenario it is assumed the ETS 2 price in 2030 will remain stable at €45/tonne (2020 price level) which according to ABN Amro (2025) translates into a real price of €59/tonne, see here.

By 2043 climate neutrality for all ETS 2 sectors

- The ETS 2 ceiling drops to zero allowances by 2043
- In NL, this applies to built environment, road transport, inland shipping, small industry and more
- Moreover, the ETS 1 for large industry, aviation and maritime shipping already ends in 2039 (zero allowances)
- This will drive up demand for alternative fuels in these sectors



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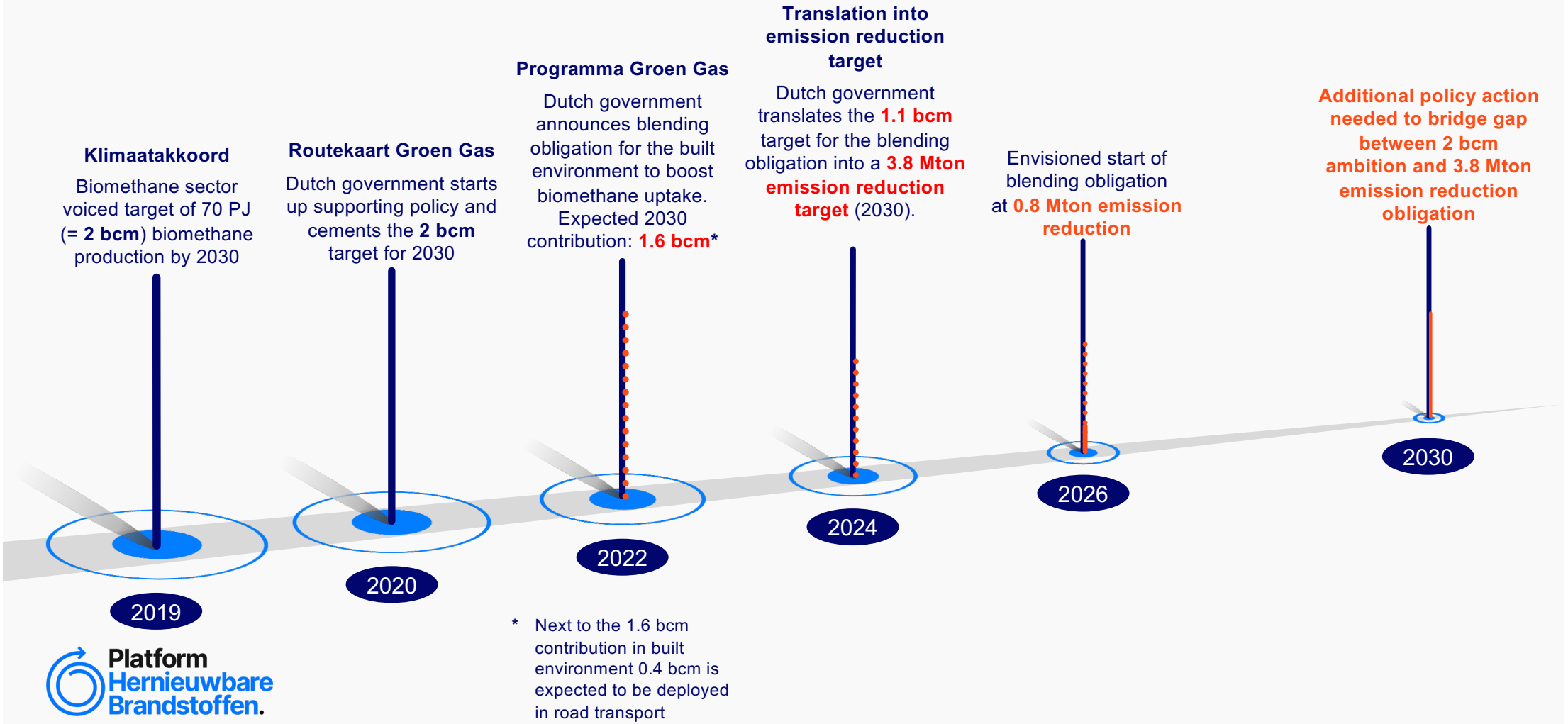
Development of biomethane policy in the Netherlands



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* Next to the 1.6 bcm contribution in built environment 0.4 bcm is expected to be deployed in road transport

Kleurenfamilie Platform Hernieuwbare Brandstoffen

Lichter				Standaard Kleur	Donkerder			
Hoofd-kleuren				Hoofd-kleuren	Hoofd-kleuren			
C9CEFF	ABB7FF	8AA0FF	608AFF	0075FF	1B61D0	224DA2	213A77	1D285F
				F9F9F9	CBCBCB	9E9E9E	747474	4D4D4D
				292930				
Steun-kleuren				Steun-kleuren	Steun-kleuren			
FFC7B0	FFAB7A	FF8E65	FF6F3F	FF4B15	D14116	A43615	7A2B13	522010
				CAFDFF	A5CED0	82A1A2	607677	404E4E
				FFEBE0	D0C0B7	A2968F	776E69	4E4946
				F4F9FE	C7CBCF	9B9EA2	727476	4B4D4E
C7F9C6	A9F5AA	87F08D	5EEB70	01E650	1ABC44	219338	206D2C	1C4820
B4A5CE	8F7BB6	69539E	412D86	01066E	0D085B	120949	140838	140527

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