Green Gas
TASKFORCE

Green Gas Jobs

Building Sustainable UK Value
29 April 2026

Cadent
Your Gas Network

Biomethane:
Building Sustainable UK Value

April 2026

Foreword from Cadent and the Green Gas Taskforce

The UK's future energy system and economy must grasp the opportunity for home-grown, renewable gas to provide jobs, lower bills and improve energy security

Baringa was asked to undertake analysis on behalf of Cadent and the Green Gas Taskforce to understand the potential economic contribution of the biomethane sector on the UK's decarbonisation journey.

Biomethane is a low regrets option to cut emissions while creating value at home in the UK. Today it already heats homes and powers businesses; with the right backing it can grow more than tenfold by 2050, anchoring thousands of high-quality jobs across the country, especially in rural areas that need investment. **This is a practical, shovel-ready opportunity for Net Zero and for the UK economy.**

Scaling biomethane improves energy security. As it can be produced domestically from wastes, residues, and wider sustainable feedstocks, it reduces exposure to imported fossil gas and global price spikes. It is available when needed and works with the pipes and boilers we already have, helping keep the system reliable as more intermittent renewables come online. **In short: more home-grown gas, fewer shocks for households and businesses.**

The economic case is robust. Scaling biomethane has been shown to reduce the cost and risk of the energy transition across a range of scenarios, supporting economic growth by freeing up resources for investment elsewhere in the economy. Spending on biomethane itself flows through UK suppliers, from farming and haulage to engineering services, so every pound invested supports high-quality local jobs and firms. Biomethane strengthens the circular economy and can even deliver net carbon removals when CO_2 is captured and stored. **Biomethane can deliver growth, skilled green jobs and cleaner air together.**

However, none of this is guaranteed. Biomethane costs today are higher than fossil gas so clear policy signals are needed to support timely investment and progress to cost parity: a stable route-to-market, enabling network funding, and a plan to build on the strong UK supply chain and skills base. **If government and industry can act early, the UK can bank the greatest environmental, economic and energy security gains of biomethane.**

"Home-grown biomethane means less volatility, lower bills and stronger energy security for the UK."

Cadent

"With clear policy ambition, biomethane can turn UK sustainable feedstocks into jobs, economic value and lower emissions."

Green Gas Taskforce

"The evidence shows that biomethane can grow tenfold, supporting tens of thousands of UK jobs. "

Baringa

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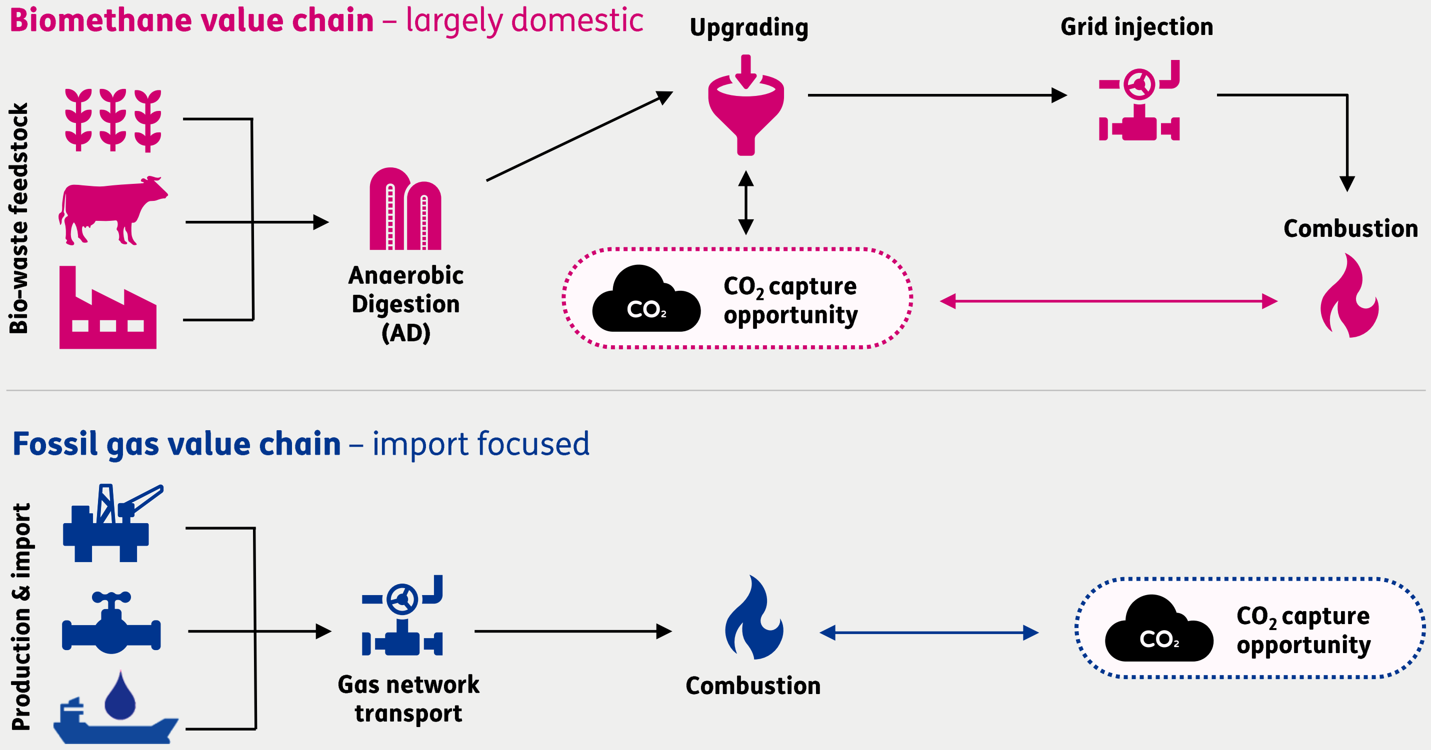
Executive Summary

What is biomethane?

A proven, home-grown solution with the potential to transform decarbonisation of heating, power generation and transport: 130+ UK biomethane sites are already heating homes today

- **Anaerobic Digestion (AD)** of organic material such as agricultural residues, and food waste, **produces biogas, which is upgraded to biomethane** (≥90% CH_4).
- **Biomethane can then be injected into the gas network** for distribution or used directly on-site for heat and power. Biomethane currently makes up around 1% of gas in the network in Great Britain.
- **By ensuring sustainable feedstocks, biomethane is a carbon-neutral gas** and can fuel heating, power generation and transport end-uses. Biomethane production and use can be coupled with carbon capture and storage (CCS) technologies to deliver net negative emissions.
- **Biomethane can be used flexibility in existing boilers, engines, and turbines, and can be stored or injected into the grid.** This makes it a valuable tool for balancing renewable energy, while significantly cutting greenhouse emissions by displacing fossil fuels.

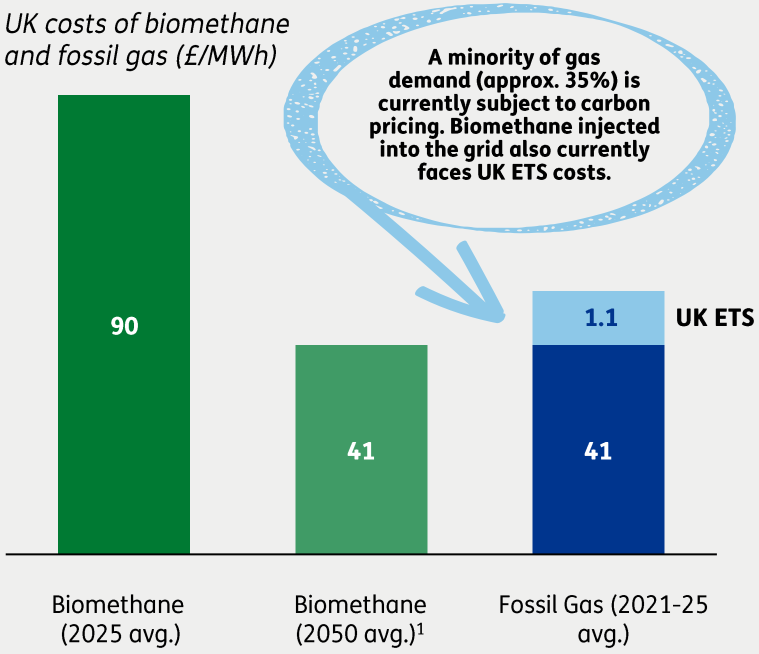


Why is biomethane not playing a more significant role?

Biomethane cannot compete with more carbon intensive options on cost alone and policy support, while crucial to build the sector to where it is today, has been limited

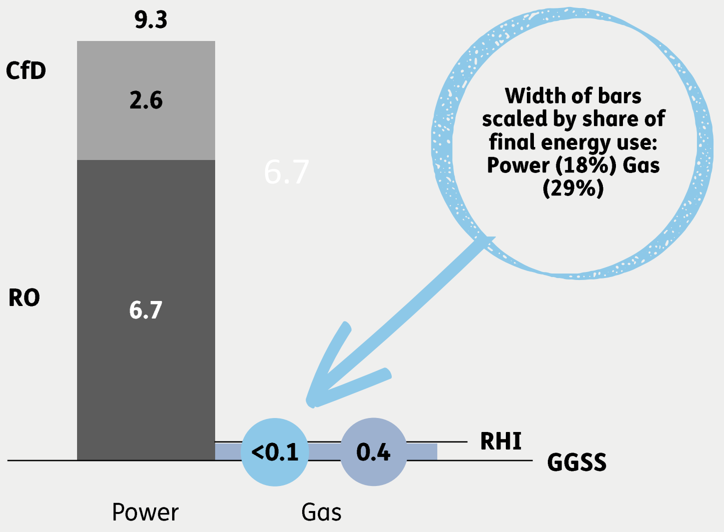
Biomethane offers relatively low-cost carbon abatement but costs are higher than fossil gas

UK costs of biomethane and fossil gas (£/MWh)



Biomethane support, while crucial to building production, is limited in scale

Low-carbon production support for power and gas sectors by scheme (£bn/year)



Ambition for decarbonisation has, to date, focused on other technologies

Capacity targets for low-carbon technologies

		2030 Capacity Target
Offshore Wind	✓	50 GW (incl. 5 GW floating)
Onshore Wind	✓	27–29 GW
Solar	✓	45–47 GW
Hydrogen	✓	10 GW (>5GW Green)
Biomethane	×	No target (production today equivalent to approx. 1 GW capacity)

Notes: 1. Baringa LCOE model, Central Scenario assuming carbon price of £200/tonne. UK ETS: UK Emissions Trading Scheme, CfD: Contracts for Difference, RO: Renewables Obligation, RHI: (Non-domestic) Renewable Heat Incentive, GGSS: Green Gas Support Scheme

Why biomethane? Why now?

Biomethane production needs to be urgently scaled up by 2030 to realise the economic potential of the sector, as well as de-risk the delivery of Net Zero

Reducing the costs of Net Zero and de-risking delivery

While biomethane production requires support, injecting more biomethane into the energy mix can **cut consumer bills**, delivering net **savings of up to £135 per year per household by 2050**, displacing the costs of additional power sector buildout. A greater role for biomethane also significantly reduces the delivery challenge of Net Zero to build and scale infrastructure.

Economic Benefit

The economic contribution of this sector could grow from about £0.5 billion annually today to £5.6 billion by 2050. This growth could support around 57,000 high-quality green jobs, including 15,000 in rural communities based on Baringa's estimated distribution of roles.

Scale of Opportunity

Great Britain's biomethane output can grow from **8 TWh** today to **100+ TWh** by 2050 (**more than 100% of annual gas LNG imports in 2024**) requiring 40 new plants each year in the late 2030s. This represents a transformative scale-up in renewable gas supply.

Low Carbon Energy Security

Expanding biomethane reduces reliance on imported fossil gas, offsetting potentially volatile gas imports and **enhancing energy resilience**. As fossil gas use declines for Net Zero, domestically produced biomethane provides a flexible, dispatchable renewable gas to keep homes and industries powered securely.

57,000 Permanent Jobs

Scaling biomethane production to support Net Zero delivery could support up to **57,000 full-time equivalent (FTE) high-quality green jobs by 2050**, and 13,000 by 2035

£5.6 billion

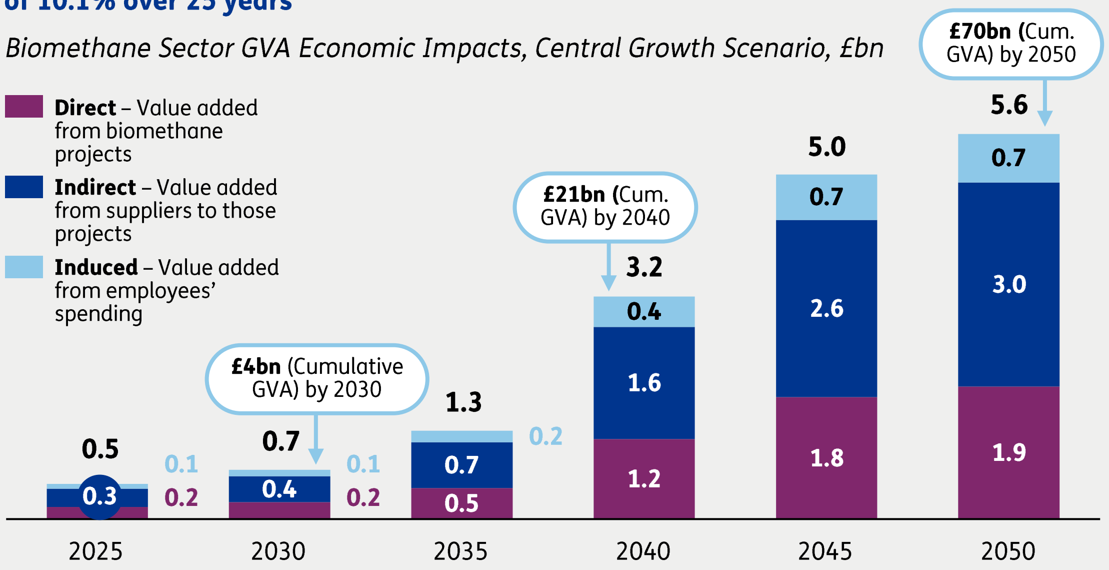
Biomethane acts as a catalyst for long-term growth, with the potential to contribute **£5.6bn** to the economy by 2050, approx. 10% of agriculture and food manufacturing sector today

What is the potential value to the UK economy?

Annual economic contribution could rise from £0.5bn today to almost £5.6bn by 2050, supporting up to 57,000 high-quality, green jobs across the value chain

The annual economic GVA contribution scales at an annual growth rate of 10.1% over 25 years

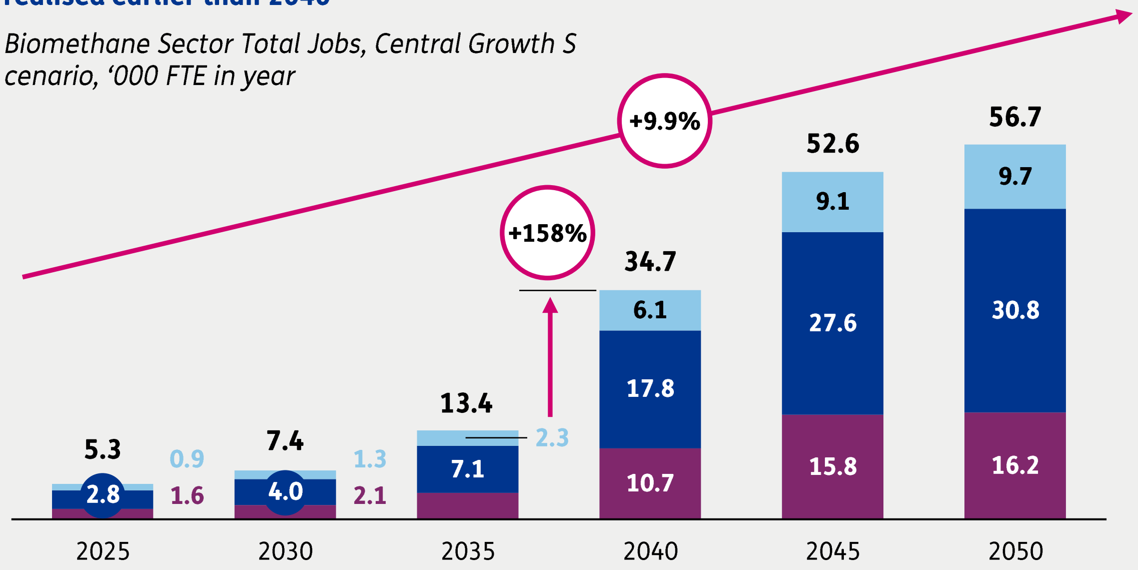
Biomethane Sector GVA Economic Impacts, Central Growth Scenario, £bn



- The step up in the value of biomethane to the economy is concentrated in the **2035-2040** period as investment in infrastructure peaks. Scaling production requires support that could peak at £1.5bn annually before costs achieve closer parity with fossil gas.
- The supply chain accounts for most of the value creation out to 2050 as the domestic ecosystem for building and serving operations develops.

Timing is policy-dependent: with clearer signals and ambition, jobs growth can be realised earlier than 2040

Biomethane Sector Total Jobs, Central Growth S cenario, '000 FTE in year



- Total employment rises from **5,000 FTE (2025) to 57,000 FTE (2050)**, an annual growth rate of **9.9%.**
- Jobs growth accelerates between 2030-2040 due to higher construction and commissioning of new capacity, then stabilises with ongoing operations after 2045.

What drives the economic and social value of biomethane? 1 of 2

Biomethane offers the potential to develop well-paid jobs in the UK, many in economically disadvantaged areas, and can generate positive knock-on effects for other sectors

Quality Job Opportunities

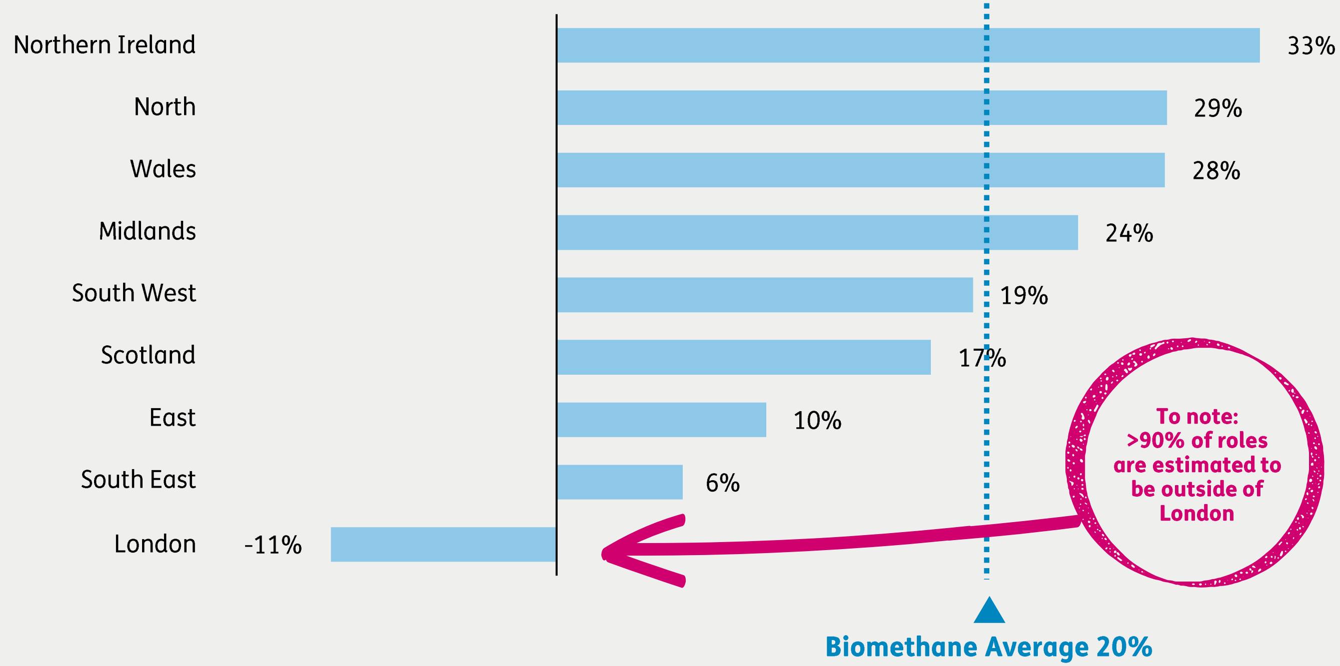
Biomethane projects create skilled, well-paid jobs e.g. technicians, engineers, project managers and support the UK's Clean Energy Jobs Plan. These jobs are often in rural or industrial areas where these roles are most sought after. These jobs tend to have higher than average wages, around 20% higher on average across the UK regions that benefit. This uplift reflects the fact that the jobs are skilled and technology-driven.

Positive Knock-on Effects

The sector encourages process innovation (e.g. sustainable feedstock development) and produces by-products (e.g. bio-fertiliser) that can stimulate growth of other industries. Biomethane can also leverage existing gas infrastructure and support retention of the associated jobs and skills. Over time, further productivity improvements can ensure the jobs created are high-value and sustainable, with workers gaining transferable skills in the green economy.

Biomethane roles pay 20% higher on average

(Biomethane sector wage premium compared to the regional average wage, % of average wage)



Source: 1. Baringa analysis of biomethane sector and ONS weekly earnings by region data

What drives the economic and social value of biomethane? 2 of 2

A high share of biomethane investment is retained in the UK and there is the potential to increase this as production scales by building out the domestic supply chain

High UK Content

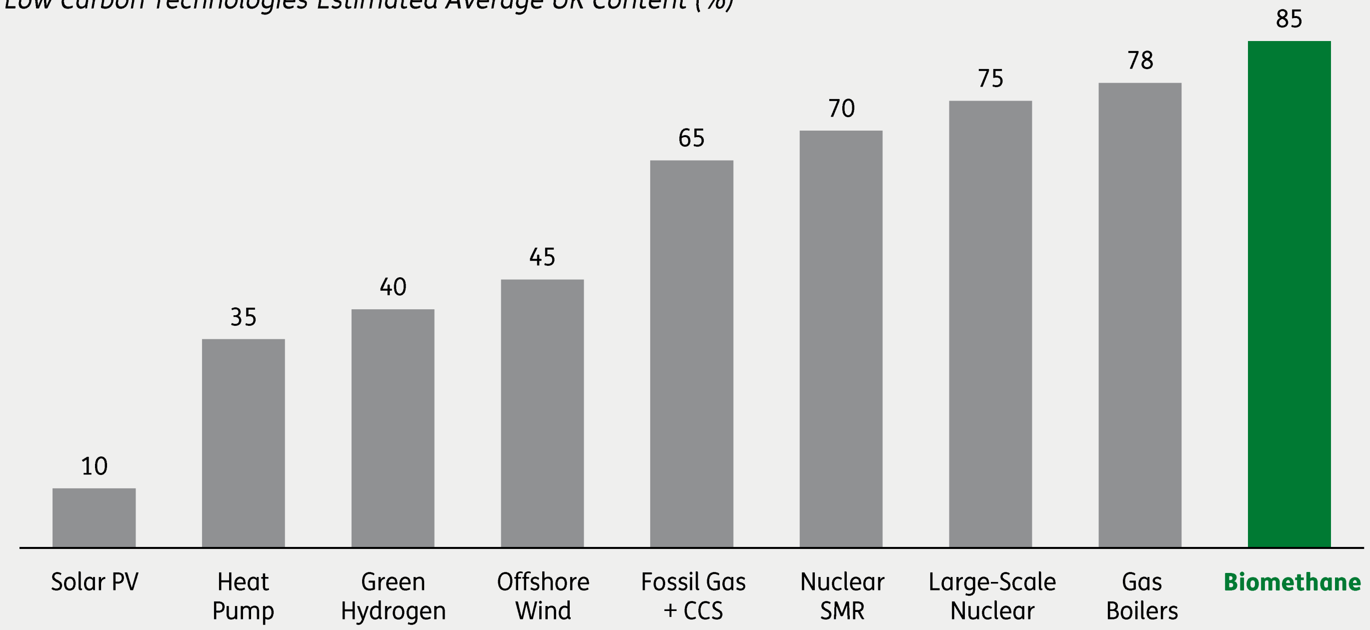
A large share of biomethane investment feeds through to the national economy. Feedstocks are local, and skills like civil engineering, fabrication of tanks and pipes, and plant operations and maintenance, are largely domestic. This **UK content is higher than many other renewable technologies** (e.g. solar PV relies on imported panels).

Sustained Capacity Building

Reaching >100 TWh requires sustained build-out, which drives the economic impact over time. Each new AD facility not only adds direct GVA and jobs but also incentivises investment in the domestic supply chain. Scaling biomethane also **avoids alternative decarbonisation costs**, saving on more expensive energy system upgrades and freeing up investment in the wider economy.

Biomethane offers >80% UK Content and the potential for net carbon removals if integrated with carbon capture and storage

Low Carbon Technologies Estimated Average UK Content (%)



Source: 1. Energy UK, ORE Catapult, Hydrogen UK, Heat Pump Association, Energy and Utilities Alliance, Baringa analysis

Where is the value distributed? 1 of 2

Alongside £1.9bn and 16,000 jobs created directly in the development and operation of biomethane production sites, a further £3.7bn and 41,000 jobs are supported in the wider supply chain and economy

Direct	Indirect	Induced
Jobs and economic value created within the biomethane sector itself, involved in producing biomethane, building and operating assets.	Jobs created in the wider supply chain that provide inputs to the biomethane sector.	Jobs supported by the spending of wages by employees in the direct and indirect sectors (i.e. wider economic ripple effects).

Direct

- Engineers (civil, mechanical, electrical)
- Project managers
- Construction workers
- Plant managers and operators
- Feedstock and logistics operatives
- Finance and administration

Indirect

- Manufacturing workers (e.g. pumps, compressors, valves)
- Welders/fabricators
- Farm contractors
- Waste management workers
- Fleet drivers (third-party haulage)
- Professional services

Induced

- Public services
- Retail staff
- Hospitality workers
- Transport sector employees
- Leisure and tourism workers

The economic impacts of biomethane propagate across multiple industries:

Construction and Engineering:
Significant GVA in civil construction (building AD plants, storage tanks) and manufacture of specialised equipment (digesters, gas upgrading units).

Agriculture and Waste Management:
Farmers and waste firms earn income by supplying feedstock (manure, crop residues, food waste) – boosting the agriculture sector's GVA and creating farm-side jobs.

Professional Services:
Planning, environmental consulting, and engineering design services see increased demand during project development.

Utilities and Network Services:
GVA rises in gas distribution companies and utility contractors due to new grid connections and pipeline upgrades for biomethane injection.

Where is the value distributed? 2 of 2

Economic value is dispersed with more than 83%, £58bn of Cumulative GVA and 46,000 jobs, flowing to regions outside London and the South-East

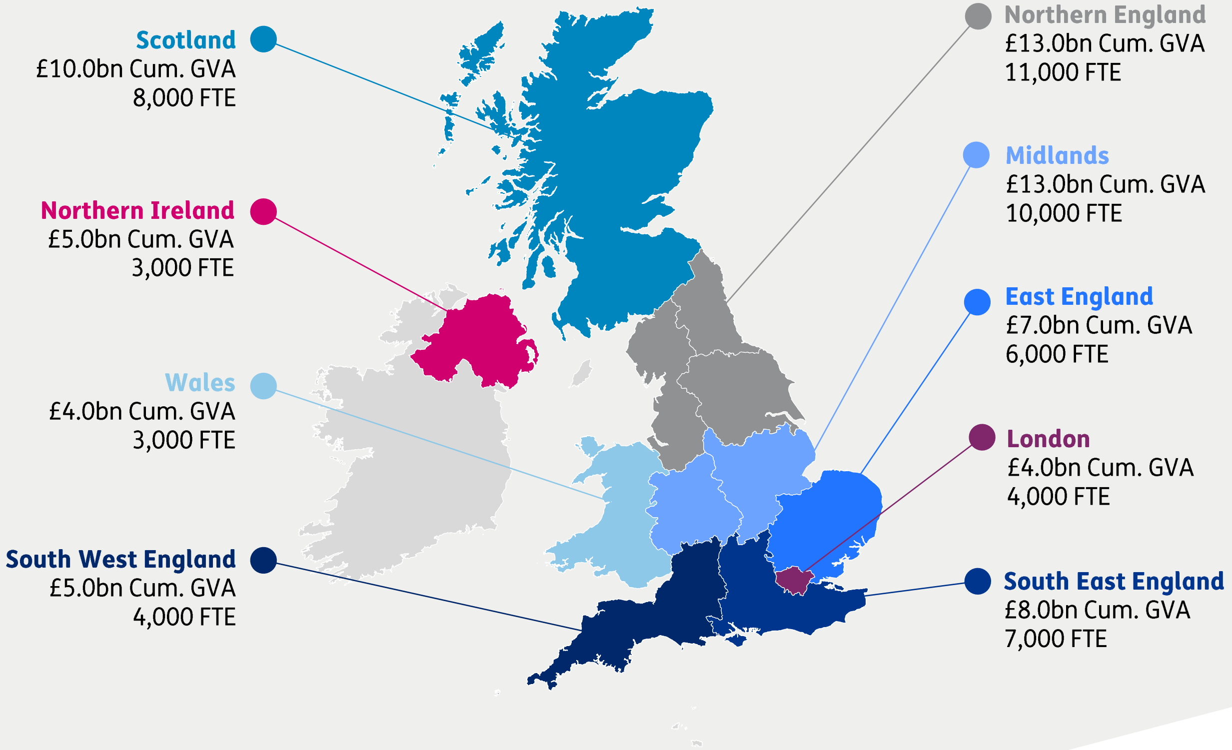
Regional Distribution

Economic benefits skew toward regions with abundant feedstock and project deployment: the Midlands, East of England, North-West, and Scotland emerge as top beneficiaries with many rural AD sites and farming bases , supporting economic diversification outside big cities. The heatmap opposite shows that regions like the Midlands see high GVA due to dense agricultural feedstock supply and scaling of biomethane plants, boosting local economic output and rural incomes. This overlaps with some lower-income regions, meaning biomethane can help level up, supporting growth where it is needed.

Rural Development Case

Many benefits accrue in rural and semi-rural areas, and biomethane can become a key element of rural economic regeneration. It adds new revenue streams for farmers (selling feedstock or hosting digesters), supports local contractors, and can create energy self-sufficient communities. This growth could support 15,000 high-quality green jobs in rural communities. For example, a cluster of AD plants in Wales or East Anglia would bolster GVA in those regions and create skilled jobs, aligning with just transition goals (supporting communities currently reliant on high-carbon sectors).

Regional breakdown of Cumulative GVA and 2050 Jobs



How can we realise this value? 1 of 2

Informed by our analysis of the value to the energy system, we previously set out nine recommendations to enable higher volumes of production, reduce production costs and realise the wider value of biomethane

Overview of Government Policy Recommendations

Enable higher volumes and cost reduction	1	Clarify Timeline	Clarify timelines for the Future Policy Framework and further **extend the current GGSS to avoid another hiatus**
	2	Future Support Mechanism	Design a policy mechanism which **supports cost-effective GHG savings** and helps facilitate a market for biomethane e.g., through a supplier obligation, without compromising sustainability
	3	Production Target	**Formalise a production target** of 20 TWh by 2035 to create a market for biomethane producers to fill the capacity gaps
	4	UK ETS recognition	**Recognise biomethane as zero carbon** in the UK Emissions Trading Scheme (ETS)
	5	Feedstock Evaluation	**Evaluate the sustainability of non-waste feedstocks** like rotational crops and subsequently broaden waste feedstock thresholds to recognise sustainable feedstocks with limited land use impact
Realise the wider value and supporting competitiveness	6	GGR Market	**Facilitate a market for Greenhouse Gas Removals (GGRs)** in the UK, incentivising cost-effective carbon removals from carbon captured via biomethane production and combustion
	7	Carbon Capture Access	**Provide access to CCS T&S infrastructure for all biomethane producers** who offer carbon capture
	8	Propanation Requirement	Either **reduce or remove** the need for propanation
	9	Digestate Market	**Establish a market for digestate** by aligning incentives to recognise digetate emissions and resource efficiency benefits and build demand from the farming industry

How can we realise this value? 2 of 2

This analysis identifies further challenges to maximise this value. Action is needed now from across government, industry and education providers to make this a reality

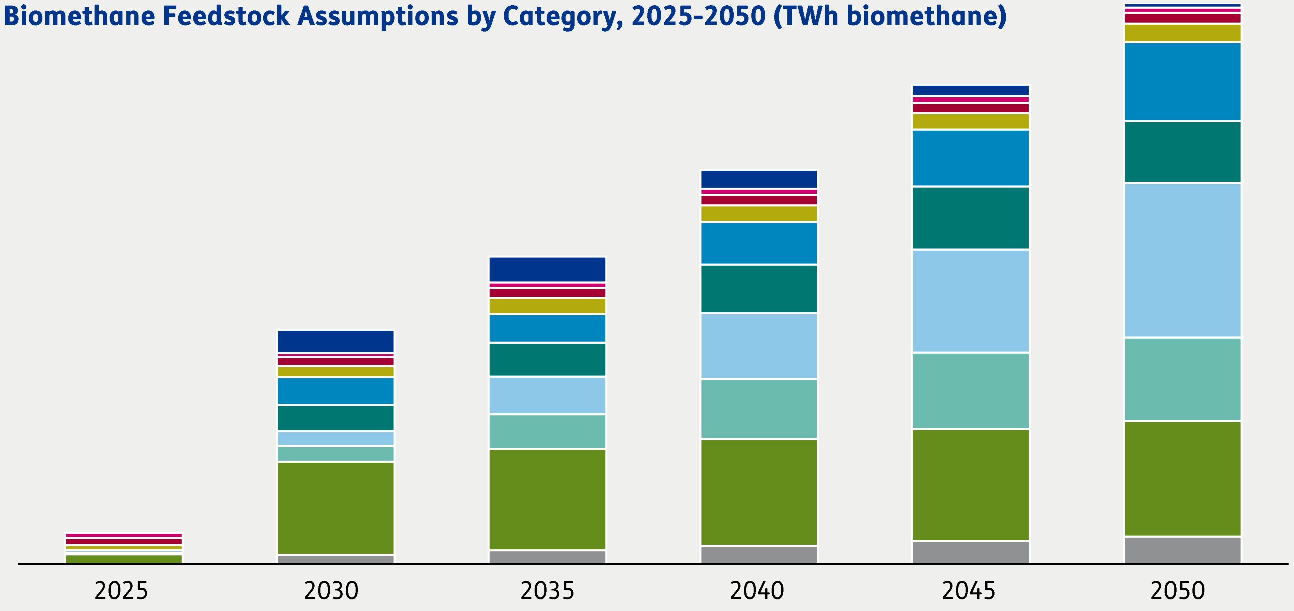
Area	Stakeholder	Challenge
Readying the network	Ofgem	**The network should be future-proofed by facilitating investments to connect and integrate greater volumes of biomethane,** allocating efficient costs and ensuring network access tariffs encourage renewable gas injection. Utilising existing gas network capacity is a key driver of the benefits offered from scaling biomethane, as it avoids the need to build new capacity elsewhere in the system.
Scaling the domestic supply-chain	Project Developers & Suppliers	**Maintain and enhance today's high UK-content share.** Mobilise investment to deliver projects at scale. Work on cost reductions through innovation and standardisation, such as modular AD plant designs.
	Local Communities & Authorities	**Mobilise feedstock and project development and reinforce local economic loops.** Identify opportunities for biomethane in waste management and farming. Support projects through planning and community partnerships.
Supporting worker reskilling	Education & Skills Bodies	**Develop a workforce with diverse expertise to take advantage of the opportunity for biomethane to provide high-quality green jobs.** Align vocational training, college courses, and certification programs with the skills needs of the biomethane sector. Engage apprentices and mid-career workers in programmes for technical skills (welding, electrical) and training specific to biogas facilities.

Context and Approach

Potential to scale: biomethane production has the potential to grow by more than 10x

Independent studies have recently highlighted the potential to produce up to 120 TWh of biomethane from sustainable, domestic feedstocks by 2050 up from approx. 7 TWh currently produced

Biomethane Feedstock Assumptions by Category, 2025-2050 (TWh biomethane)



	CAGR (25-50)	CAGR (30-50)
Landfill Gas	N/A	-8%
Food Waste	2%	2%
Sewage Sludge	2%	1%
Processing Wastes and Residues	5%	3%
Agricultural Residues	15%	5%
Livestock Waste	18%	4%
Grassland	23%	13%
Sequential Crops	N/A	9%
Rotational Crops	10%	1%
CHP Conversions	N/A	6%

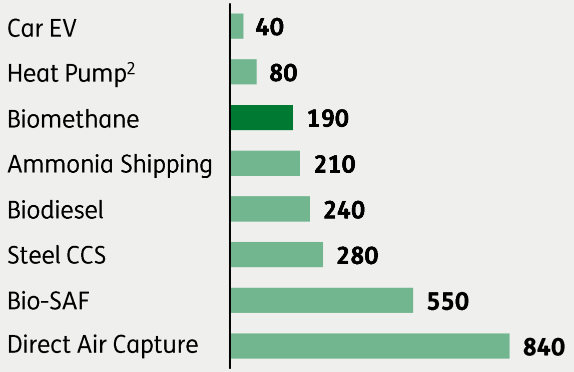
Source: Alder Bioinsights 2025 Feedstock Study

Cost savings opportunity: biomethane can derisk and reduce costs of the transition

Biomethane delivers £174bn of cumulative savings to the energy system on the path to Net Zero by 2050 in our Central scenario. Biomethane offers competitive abatement across the range of scenarios considered

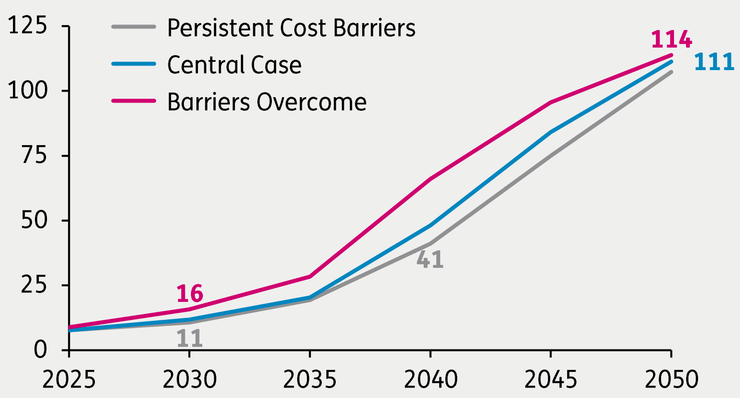
Biomethane presents a relatively low-cost solution to deliver GHG savings towards meeting Net Zero

Abatement costs of different technologies by 2050 (£/tCO2)[1]



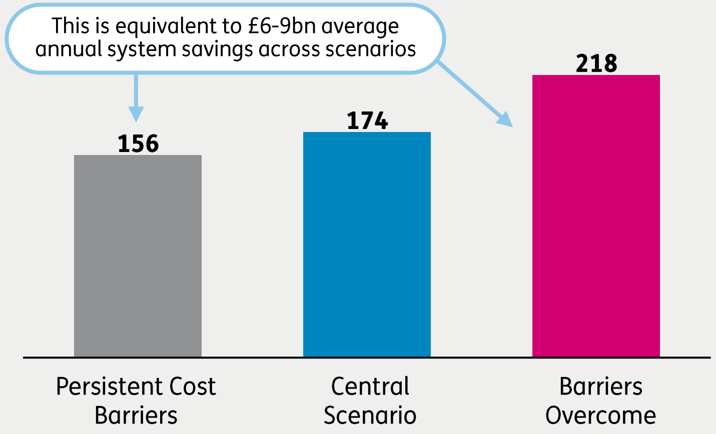
Biomethane production increases to more than 100 TWh in all scenarios considered[3]

Biomethane production (TWh/year)



By addressing biomethane barriers faster, cumulative cost savings could reach £218bn by 2050

Cumulative Savings by 2050 (£bn)

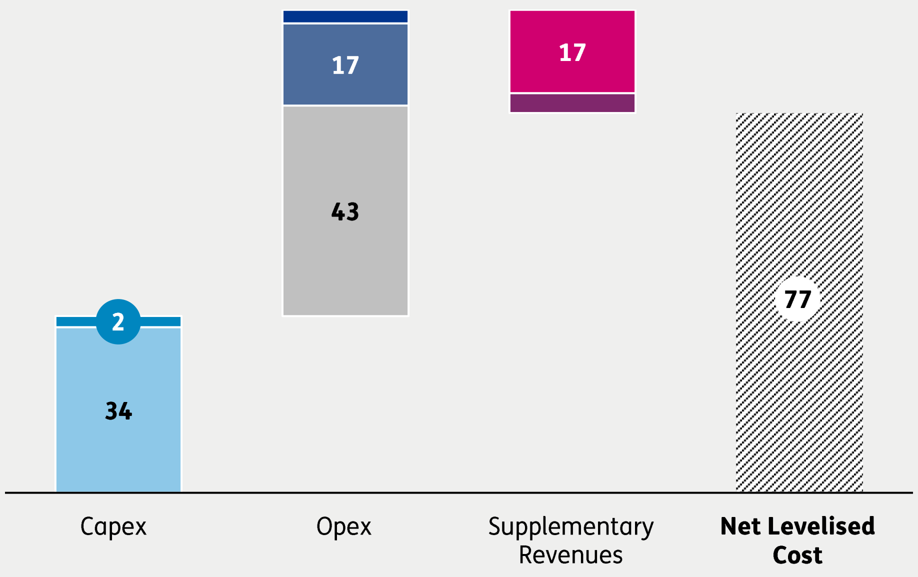


1. 2050 abatement costs are uncertain, reported costs are Central Case assumptions 2. The abatement cost of Heat Pumps is for the unit cost only, assuming installation in a home with a good/excellent thermal rating (COP = 3), and does not include additional system costs
3. Barriers Overcome: Biomethane costs reduce more quickly & it is more competitive as an energy vector, **Persistent Cost Barriers:** Costs decline slowly & alternative technologies are more competitive | **Source:** Energy System Catapult's ESME model

Production costs: biomethane is supported today via the Green Gas Support Scheme

Plant size and feedstock type are key variables that affect the net levelised cost of biomethane production

Net Levelised Cost[1] of Biomethane Production by Components, 2025 (£/MWh)



	Description	Key variables
Capital Expenditure	Up-front cost to set up AD plants and upgrading infrastructure	Plant size Type of feedstock Location
Grid connection	Costs of connecting to the grid	Type of grid connection Distance to grid
Other Operational Expenditure	Energy costs, site maintenance, and other costs	Plant size
Feedstock	Ongoing costs to acquire feedstocks to feed AD plant	Type of feedstock Plant size
Propane	Ongoing costs to acquire propane for grid injection	Plant size Propane costs Required propane volume
RGGOs and/or biogenic CO_2	Sale of green credentials for biomethane or biogenic CO_2 (utilised or stored)	Plant size Feedstock type Capture technology
Digestate	Potentially a cost for waste removal, or a revenue stream if sold as a byproduct	Plant size Feedstock type Gate fees

1. Production example is based on a medium AD plant with CCS upgrader, processing livestock wastes

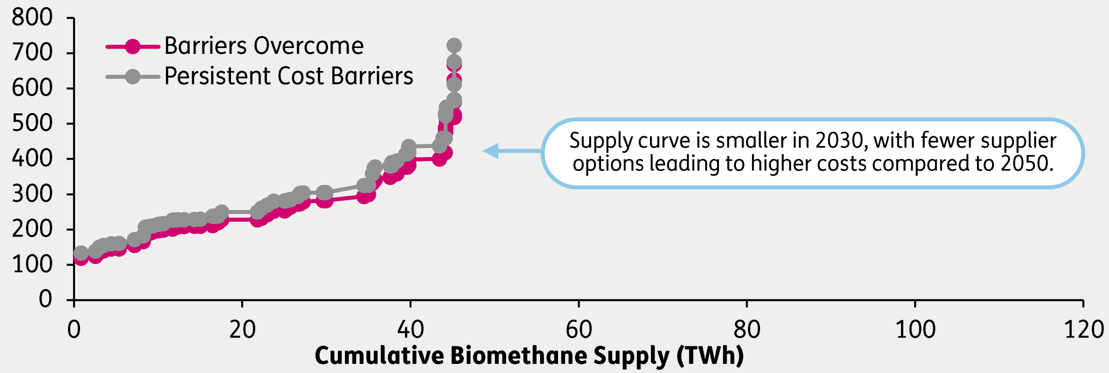
Source: Baringa LCOE Model, Baringa analysis

Abatement potential: biomethane can provide increasing carbon abatement

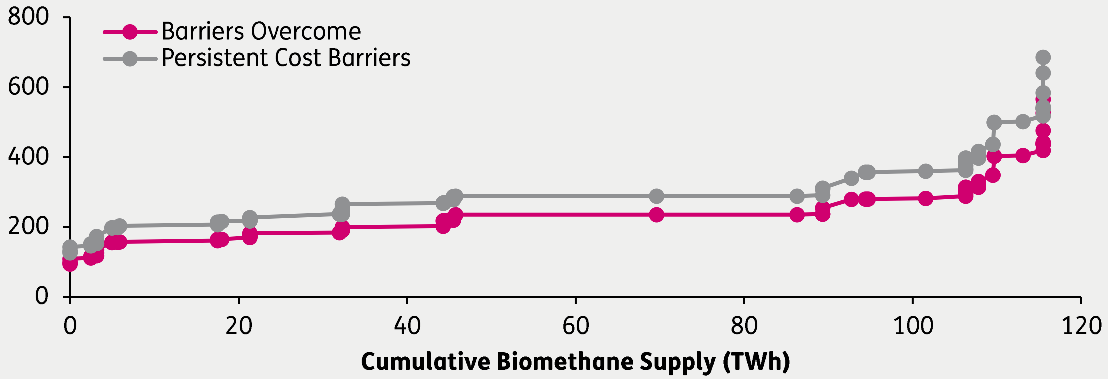
Typical biomethane projects could deliver GHG savings with an abatement cost below £200/tCO2

Biomethane Abatement Cost Curves (£/tCO2)[1]

In 2030, typical GHG abatement costs are expected to be in the range of 200 to 300 £/tCO_2



With Barriers Overcome, this could fall to less than £200/tCO2 for 45 TWh and less than £290/tCO_2 for a further 62 TWh by 2050



- **GHG abatement cost example:** a biomethane project with a net production cost of 100 £/MWh and fossil gas equivalent revenues of 30 £/MWh would have missing money of 70 £/MWh. If the biomethane produced saves 0.183 tCO_2/MWh, the project would have a GHG abatement cost of c. 380 £/ tCO_2 (=70/0.183)
- **Abatement costs increase with biomethane production** because the most cost-effective feedstocks and projects are developed first. As output grows, producers move to more expensive or less effective options

1. Assumes fossil gas price of £27/MWh | **Source:** Baringa analysis

Barriers to growth: investment in biomethane will dry up without clarity on future policy

Current policy fails to incentivise the most cost-effective GHG savings from sustainable feedstocks at scale

Principles for future policy design and performance of current Green Gas Support Scheme (GGSS)

Policy principles[1]	Long-term certainty	Cost-effective GHG savings	Market-based	Compatibility
Description	Establishes sufficient confidence among industry and investors to grow the market	Prioritises the most-cost effective feedstocks and production methods to deliver GHG savings	Enables the market to determine and deploy the most appropriate solution(s) to reduce costs, maximise GHG savings and enhance efficiency	Mitigate unintended distortions with domestic and international policies to maximise buyer confidence and value for money
Performance of current policy (GGSS)	**Requires amendment** Helps underpin new investments but currently restricted to greenfield projects and expires in March 2028, impacting development decisions now	**Fundamentally challenged** Tiered tariffs disincentivise scale and the minimum waste threshold constrains projects while failing to recognise sustainable, non-waste feedstocks	**Fundamentally challenged** Administratively-set tariffs run the risk of failing to accurately reflect the cost of new biomethane projects and create little incentive for competition among producers	**Requires amendment** Current policy treats biomethane as having equivalent emissions to fossil gas in the context of determining carbon costs linked to UK ETS

1. These design principles are well aligned to the Government's "Future Policy Framework for Biomethane Production: Call For Evidence" published April 2024 and their broader policies driving decarbonisation

Input-Output Methodology: estimating GVA and job impacts

We leverage ONS UK supply and use tables to model investment in biomethane production

In addition to supporting economic growth by reducing costs of the energy system on the path to Net Zero, the economic impact of the biomethane sector itself can be quantified.

Our **Baringa Input-Output Model** leverages ONS published UK supply and use tables to model how investment in biomethane production will benefit the economy in terms of jobs and GVA.

Key inputs are:

- Spend and regional profiles across construction and operation phase
- Regional distribution of economic activities (ONS)

Industry investment profile

Procurement of production capacity

Design	Spend on UK services for initial design (CAPEX)
Components	Sourcing of equipment and components (CAPEX)
Construction	Construction of infrastructure (CAPEX)
Operation services	Spend on operation and maintenance services, incl. replacement (Opex)

UK Supply-Use tables

Supply Chain

Down-stream value chain activities	Down-stream supply chain products and services demanded because of economic activity from direct procurement of UK goods and services investment/spend.

Type 1 multipliers to calculate direct and indirect impacts

1 Direct GVA and Jobs

2 Indirect GVA and Jobs

Consumption enabled by salaries supported through direct and indirect GVA

Type 2 multipliers to generate induced impacts from consumption enabled from direct and indirect impacts.

3 Induced GVA and Jobs

How we quantified impact: input-output modelling of the biomethane sector

We convert biomethane spend into GVA and FTE across the affected sectors

Inputs

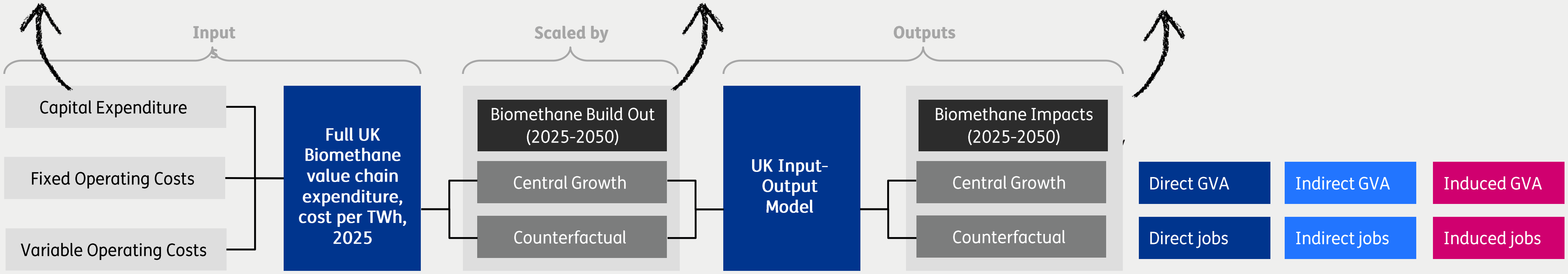
Deployment pathways are mapped into spend by segments: **feedstocks and logistics, AD construction, upgrading, grid connection and operations.** This captures the range of capex, fixed and variable opex. Each spend line are allocated to **UK SIC** sectors for I-O multiplier analysis.

Scaled by

Inputs under the biomethane growth pathways are scaled for **2025-2050, ONS Type I/II Input-Output multipliers** are then applied on top. This converts project spend into economy-wide stimuli reflecting **supply-chain linkages** and **household spending.**

Outputs

Annual **GVA (£)** and **jobs (FTE)** are produced and then split into **Direct, Indirect and Induced** effects, showing **build-out peaks** and **steady-state operations** over time. Results are sense-checked against ONS benchmarks and explored via sensitivities on **UK content, costs / productivity and timing.**



Source: ONS, UK Input-Output Analytical Tables , Supply and Use Tables, 2023

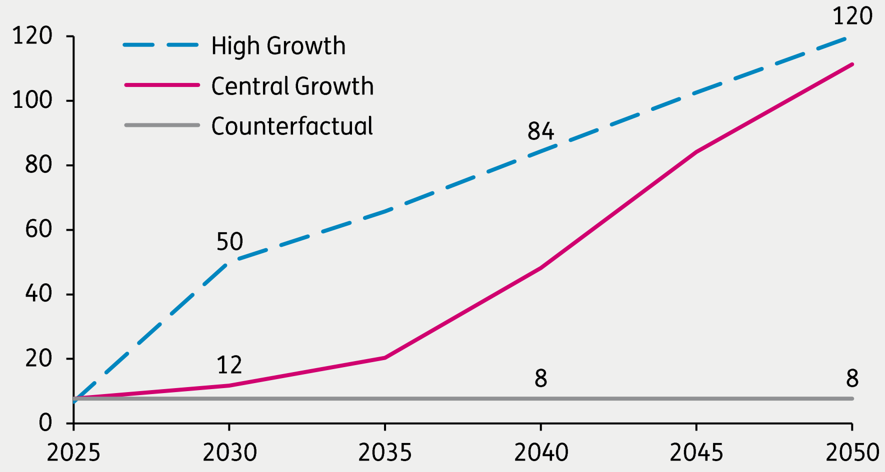
Sensitivities: accounting for key drivers of biomethane economic impacts

The growth trajectory, degree of UK content, changes in the structure of the economy and development of production costs are key sensitivities

Sensitivity	Description
Growth of Biomethane	Higher production growth drives more capex and opex investment through UK supply chains, lifting total **GVA and jobs**, with the biggest step-up during construction build-out.
UK Content	More domestic sourcing raises the share of investment captured by UK suppliers and households, **amplifying multipliers** and retaining more of the economic benefits.
Structure of the economy	Changes in sector productivity, wages and import propensities alter **I-O multipliers**, affecting the distribution of economic and employment impacts generated from the direct economic 'shock' of biomethane investment.
Costs	Cost reductions can **increase the production impact per £ invested**, while higher costs will increase the economic size of the sector but reduce the savings biomethane can deliver elsewhere in the economy

Biomethane production reaches 111 TWh in the Central Growth scenario. High Growth represents a credible upper bound.

Biomethane production (TWh/year)



Source: Baringa Analysis, Energy System Catapult's ESME model

Results and Insights

Biomethane's annual economic contribution can rise from £0.5bn to £5.6bn by 2050

More than half, £3bn, of the £5.6bn GVA economic contribution of the sector sits with the supply chain

The economic contribution scales grows out to 2035 before rising more quickly as build-out of biomethane production capacity peaks during the late 2030s, stabilising from 2045 as the industry moves into a steadier state. By 2050, total GVA is £5.6bn and the sector supports almost 57,000 FTE high-paying jobs.

The total economic contribution builds from the initial Direct investment impacts, concentrated in the local area to include Indirect and Induced impacts:

- **Direct:** Day-to-day biomethane production, site operations and maintenance drive £1.9bn GVA and 16,000 jobs in 2050. Construction spending to scale production is also captured here.
- **Indirect:** The indirect jobs supported in the supply chain rise from less than 3,000 to more than 30,000 as demand feeds through to the manufacturing, agricultural and waste management sectors, in particular, to provide equipment and feedstock.
- **Induced:** Wages paid to the direct and indirect workforce ripple out from local economies nationwide – retail, hospitality, transport and public sector roles supporting up to £0.7bn GVA and almost 10,000 jobs by 2050.

Biomethane GVA and Job Impacts 2025-2050, Central Growth Scenario

	Direct Impact		Indirect Impact		Induced Impact		Total	
Year	GVA (£bn)	Jobs ('000 FTEs)	GVA (£bn)	Jobs ('000 FTEs)	GVA (£bn)	Jobs ('000 FTEs)	GVA (£bn)	Jobs ('000 FTEs)
2025	0.2	1.6	0.3	2.8	0.1	0.9	0.5	5.3
2030	0.2	2.1	0.4	4.0	0.1	1.3	0.7	7.4
2035	0.5	4.0	0.7	7.1	0.2	2.3	1.3	13.4
2040	1.2	10.7	1.6	17.8	0.4	6.1	3.2	34.7
2045	1.8	15.8	2.6	27.6	0.7	9.1	5.0	52.6
2050	1.9	16.2	3.0	30.8	0.7	9.7	5.6	56.7

Source: Baringa Analysis

The Central scenario unlocks £5.3bn more GVA annually and 53,000 more jobs

Compared to a scenario where production remains at today's levels, biomethane can deliver £57bn more in cumulative economic value while securing £174bn of energy system cost savings by 2050

If investment is not scaled biomethane will remain a niche low-carbon energy source

Biomethane GVA and Job Impacts 2050, Central Growth and Counterfactual (Production Today) Comparison

Impact Segment		Central Growth Scenario	Counterfactual Scenario
Direct Impact	**GVA (£bn)**	1.9	0.1
	Jobs ('000 FTE)	16.2	0.8
Indirect Impact	**GVA (£bn)**	3.0	0.2
	Jobs ('000 FTE)	30.8	1.9
Induced Impact	**GVA (£bn)**	0.7	0.0
	Jobs ('000 FTE)	9.7	0.6
Total	**GVA (£bn)**	**5.6**	**0.3**
	Jobs ('000 FTE)	**56.7**	**3.3**

Source: Baringa Analysis

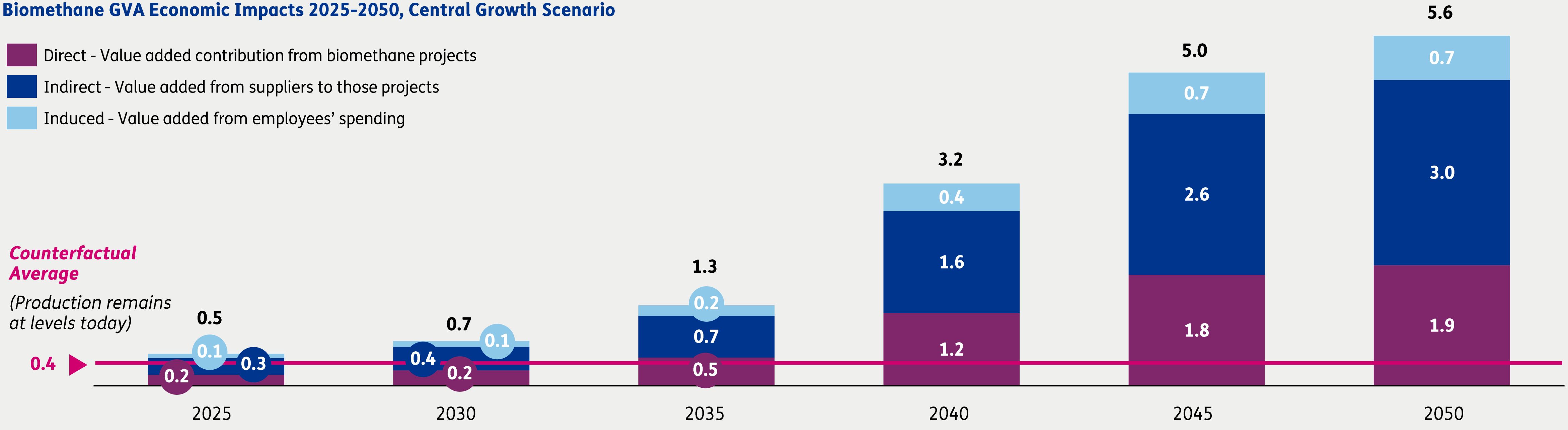
For every job supported directly, almost three additional jobs are supported downstream

- The Central Growth scenario modelled sees the annual economic contribution of the biomethane sector rising by £5.3bn and 53,000 jobs as production scales from 7 TWh to 111 TWh, compared to £0.3bn and 3,300 jobs in the Counterfactual scenario where production remains at today's levels.
- The highest growth is realised in the biomethane supply chain:
  - **Direct:** Additional 15,400 FTE
  - **Indirect:** Additional 28,900 FTE
  - **Induced:** Additional 9,100 FTE
- **The effect of the direct investment is multiplied through the supply chain and through employee wages**, with the indirect and induced components accounting for the majority of the uplift.
- **Scaling biomethane can build the UK supply chain**: equipment manufacturing, agriculture, waste management, logistics and network services all benefit. A high proportion of economic activity for the biomethane sector is currently retained in the UK and this is assumed to continue as the sector scales, amplifying the benefits relative to the Counterfactual

The biomethane sector can achieve rapid growth as a sector to support decarbonisation

In our Central Growth scenario the annual economic contribution almost triples in a decade, reaching £1.3bn, before growth ramps up again to reach £3.2bn by 2040

Biomethane GVA Economic Impacts 2025-2050, Central Growth Scenario

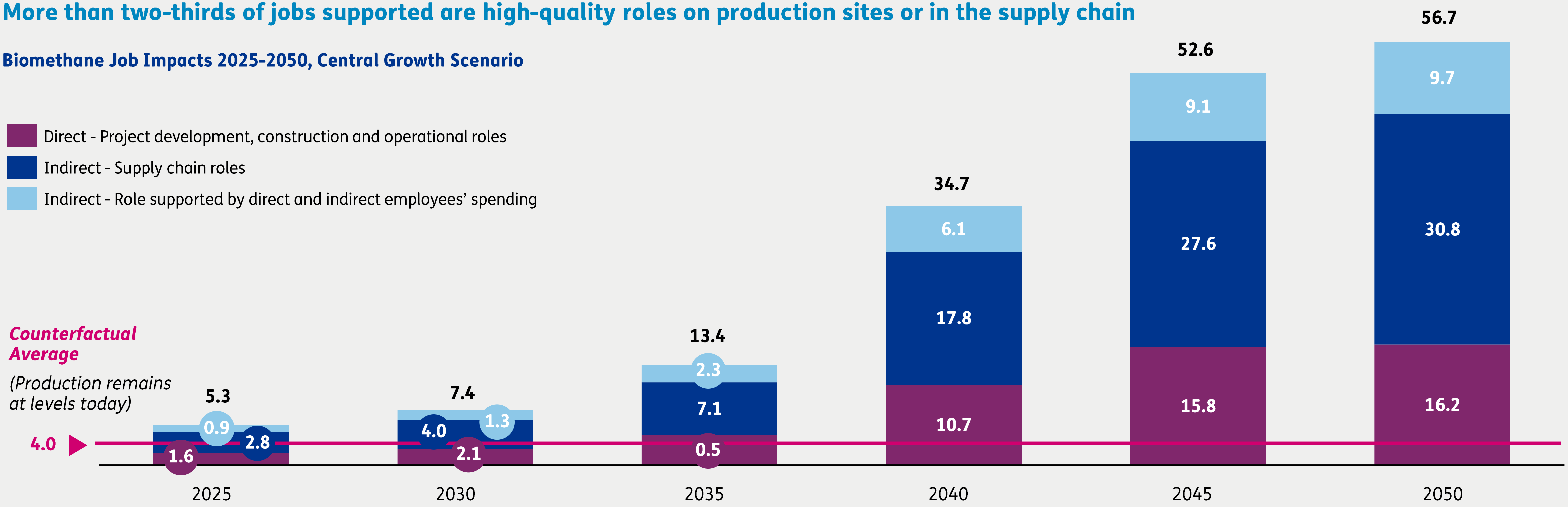


1. Counterfactual average falls below 2025 levels as biomethane construction capex activity reduces
Source: Baringa Analysis

The biomethane sector can support 13,000 roles by 2035 and almost 35,000 by 2050

More than two-thirds of jobs supported are high-quality roles on production sites or in the supply chain

Biomethane Job Impacts 2025-2050, Central Growth Scenario

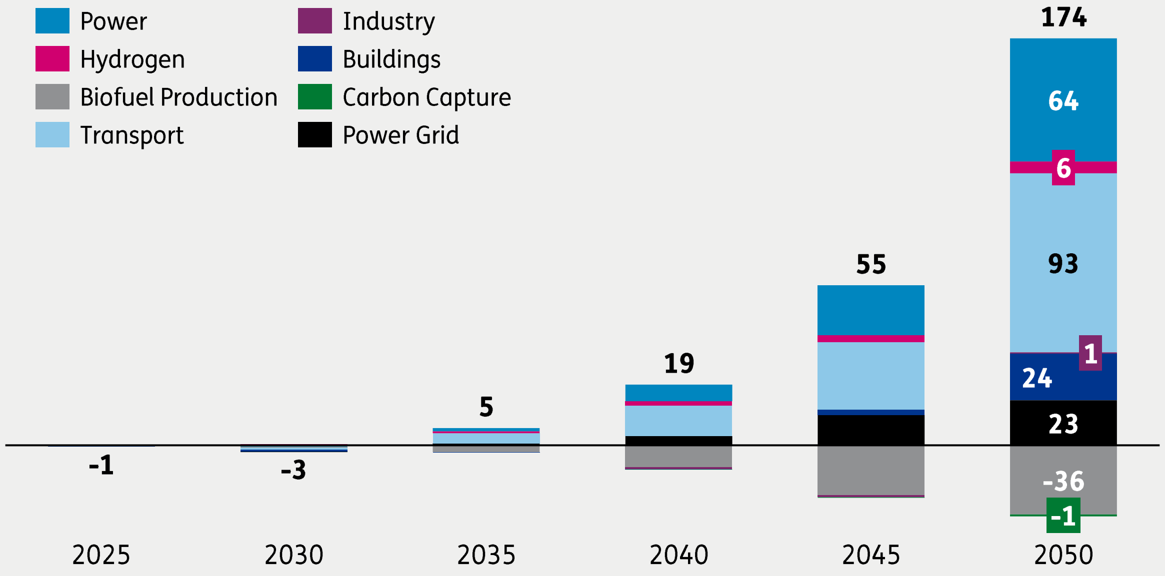


1. Counterfactual average falls below 2025 levels as biomethane construction capex activity reduces
Source: Baringa Analysis

Scaling biomethane can deliver savings and support growth elsewhere in the economy

The £174bn cumulative saving identified in system modelling of the Central scenario is mostly achieved in transport, as well as power generation, avoided electricity network investments, and buildings

Cumulative System Cost Savings in our Central Growth Scenario (£bn)



Source: Energy System Catapult's ESME model, Baringa Analysis

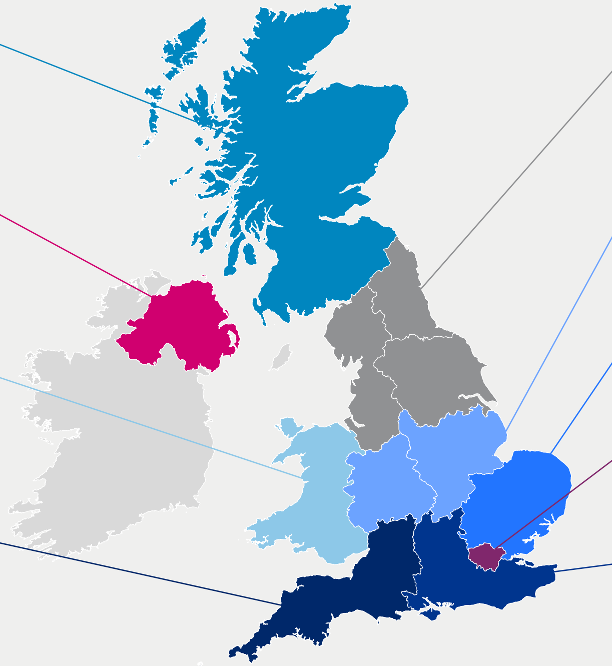
Transport	Biomethane can deliver carbon removals, which allows for replacement of high-cost abatement options in hard-to-abate sectors such as aviation and HGVs
Power	Reduced deployment of renewables, where additional build-out requires further costly system investment to manage variable risk from weather
Buildings	Preserving the use of gas boilers to deliver low levels of residual gas heating demand in the hardest-to-abate homes
Power Grid	Need for electrification gets deferred, thus reducing upfront power sector investment

Increasing the production of biomethane has benefits across the energy system. Biomethane provides cost-effective flexibility and reduces the costs of meeting peak demand. Greater biomethane avoids more costly abatement and means other technologies can be deployed at lower average-costs and with reduced supporting investments required

Biomethane can deliver higher wages and meaningful jobs across the UK's regions

In all regions of the UK outside London, biomethane sector roles offer higher than average wages

Regional breakdown of 2050 Jobs per Constituency and Wage Premium[1]



Scotland
£7,000 Wage Premium
133 FTE / Constituency
8,000 FTE

Northern Ireland
£12,000 Wage Premium
193 FTE / Constituency
3,000 FTE

Wales
£11,000 Wage Premium
101 FTE / Constituency
3,000 FTE

South West England
£8,000 Wage Premium
72 FTE / Constituency
4,000 FTE

Northern England
£11,000 Wage Premium
74 FTE / Constituency
11,000 FTE

Midlands
£10,000 Wage Premium
97 FTE / Constituency
10,000 FTE

East England
£4,000 Wage Premium
96 FTE / Constituency
6,000 FTE

London
£6,000 Wage Discount
58 FTE / Constituency
4,000 FTE

South East England
£3,000 Wage Premium
72 FTE / Constituency
7,000 FTE

Biomethane's multi-faceted supply chain presents an opportunity for high-quality green job creation, spread widely across the UK

- **Rewarding green jobs:** Biomethane roles pay from £7,000 - £12,000 above regional averages for UK regions outside of London and South-East England. the uplift in the South-East and East of England is still attractive at £3,000 - £4,000. Only London pays higher wages on average than the biomethane sector.
- **Jobs per constituency are material:** By 2050 the sector can support between 58-193 FTE jobs on average per constituency in each region, with the benefits disproportionately accruing to regions where biomethane can offer a higher wage premium.
- **Value is widely distributed:** **81% of total job impacts (46,000 FTE)** accrue outside London and the South-East by 2050, reflecting the distribution of feedstocks and deployment of biomethane production.
- **Regional strengths:** Benefits skew to **rural and semi-rural areas** with larger agricultural bases and AD build-out, with spillovers into local **construction, engineering, logistics and other professional services**.
- **Maximising benefits:** Efficient clustering and siting of projects with grid connections can amplify wage premia and the contribution to local employment.

Notes: 1. Wage premium = Weighted-average biomethane role wage minus regional average wage.; Jobs per constituency = regional jobs / number of constituencies | **Source:** ONS, Alder BioInsights, Baringa Analysis

The economic contribution of the sector has the potential to scale more rapidly

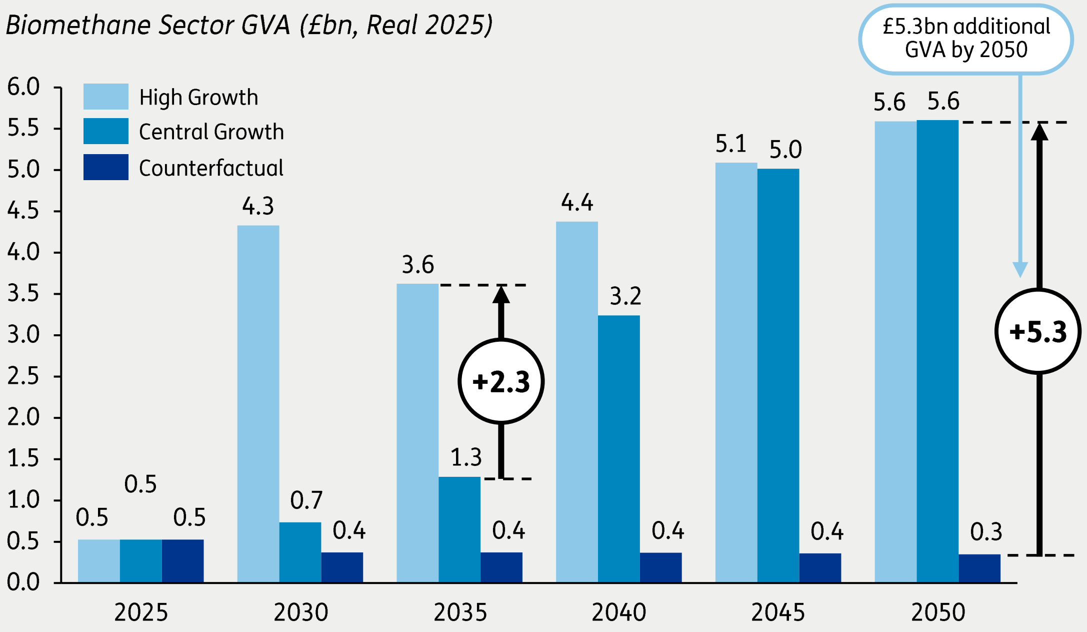
With greater ambition, industry could mobilise investment to scale at a rate more closely aligned to feedstock growth potential

The biomethane sector has demonstrated its capability to mobilise investment and scale significantly since 2010

Growth to Date	The UK has scaled biomethane production for injection into the gas network since the first commercial scale project in 2012 to **7-8 TWh/year today,** supported first by the Renewable Heat Incentive (RHI) and now by the Green Gas Support Scheme (GGSS). **The fastest single-year step-up in capacity achieved to date is approx. 2 TWh** – demonstrating the potential to build momentum quickly and drive growth over the next decade.
Central Scenario	In the Central Growth scenario, the sector's annual GVA builds steadily as deployment grows and high UK content is maintained: £0.7bn in 2030 rising to £5.6bn by 2050. This scenario assumes growth in biomethane production aligned with the optimal growth trajectory from Baringa's modelling of the lowest cost path to deliver a Net Zero energy system by 2050.[1] The 2035-2045 period seeing the fastest growth as construction peaks.
Growth Potential	The High Growth scenario sees the sector grow to **£4.3bn by 2030 as capital investment rises rapidly to scale production to 66 TWH by 2035**, compared to 28 TWh in the Central Growth scenario. Underpinning this scenario are production levels aligned with production potential as identified in several independent studies. The policy support and ambition for biomethane are key determinants of the timing for economic value to be realised.

The sector can grow more rapidly with a £2.3bn higher GVA impact in 2035 before the Central and High scenarios converge by 2050

Biomethane Sector GVA (£bn, Real 2025)

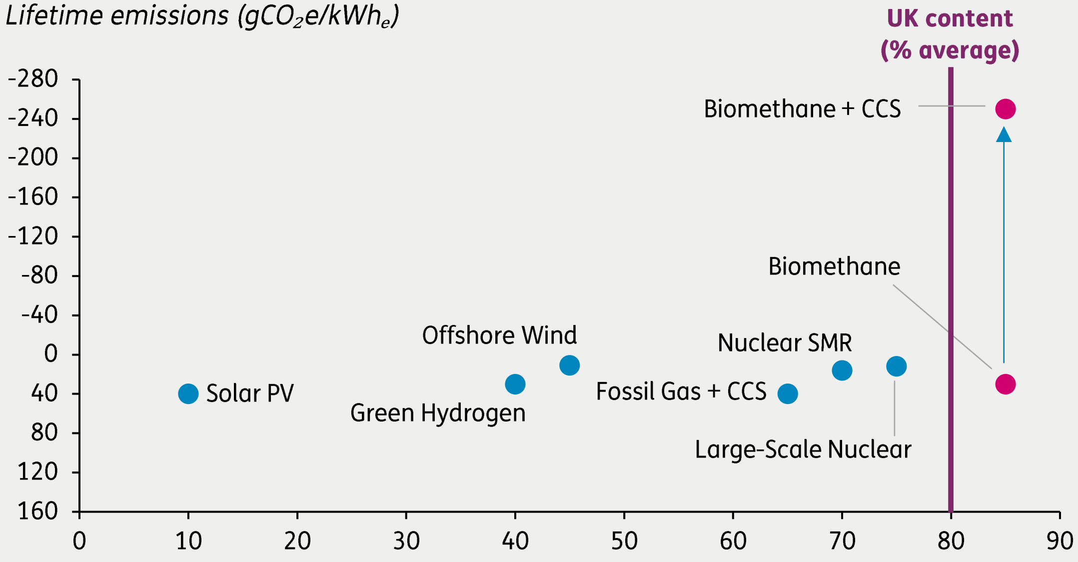


Source: Alder BioInsights, Baringa Analysis

Retaining UK content is crucial for scaling economic value in line with production

The biomethane industry already retains an exceptionally high share of economic value domestically.

Biomethane offers >80% UK Content and the potential for net carbon removals if integrated with carbon capture and storage



Source: Energy UK, UK Government, Hydrogen UK, National Renewable Energy Laboratory, Oxford Institute for Energy Studies, International Energy Agency, Baringa Analysis

Scaling biomethane production can lock in more value for every pound invested by maximising domestic content in the supply chain

Construction and Engineering:

Most of a project's capex and opex is UK-addressable (civil construction, vessels and pipework, grid connection, operations and maintenance, and feedstock / logistics). That is why biomethane emerges as one of the strongest low carbon technologies in terms of UK content and why, in our Input-Output economic modelling, the indirect share of GVA is so significant as supply chain scales and value is retained in the UK with a limited role for imports.

Raising UK content increases the Input-Output multipliers and total UK GVA:

If UK content fell to 60%, this would reduce the annual GVA impact from £5.6bn to £4.2bn and could exceed £6.2bn if UK content could be raised to 90%. Several measures could increase the value retained in the UK economy.

1. **Local fabrication and assembly** of upgraders, compressors and tanks can be supported by developers agreeing frameworks with suppliers
2. **Strategic procurement** prioritising the UK where competitive plus long-term servicing agreements can retain greater O&M spend.
3. **Coordinating action to build skills and certifications** to deepen the domestic talent pool (plant operators, electricians, welders, control engineers).

The potential economic contribution will depend on key structural economic factors

These will determine the organisation and impact of the sector's activities from feedstock collection through production to distribution

	Supply-chain Structure	Economic Geography	Competition	Technology
Description	**How the biomethane sector's activities are organised from feedstock collection through production to distribution.** In the UK this chain involves many domestic players – local farms and waste managers supply feedstocks, UK contractors build and operate anaerobic digestion (AD) plants, and gas network companies manage grid injection.	**Location-specific aspects of the supply-chain and the regional distribution of benefits.** Spread of resources means production facilities concentrate in certain areas where feedstocks are abundant. Regions such as the Midlands, East of England and Scotland are poised to host new plants due to large agricultural sectors and available organic wastes.	**Covers two dimensions: Competition within biomethane industry** covers the diversity of producers and buyers, the degree of open market trading (e.g. competitive auctions, certificate schemes) against fixed tariffs or monopoly production, and competition for inputs. **Biomethane also competes against other low-carbon solutions.**	**Encompasses advances in production methods, process efficiency, and new applications** that improve the sector's performance over time. Key areas include better conversion technologies, improved biogas upgrading and integration of carbon capture. R&D is also yielding gains in automation, digestate management, and biomethane storage.
Potential to influence economic impacts	High	Moderate	Moderate	High
	How each pound invested flows through firms and workers will crucially influence the distribution and overall level of the economic contribution. A more distributed supply chain with many regional suppliers, rather than a market dominated by a few firms, can spread value more widely.	The spread of production and the supply chain is uncertain and will affect regional co-benefits e.g. how biomethane can revitalise the countryside, align with just-transition goals by providing alternative jobs in areas dependent on high-carbon industries, and strengthen economic resilience.	Competition can boost efficiency and innovation, increasing economic impact by enabling more deployment for a given level of support but only if balanced with smart policy to avoid resource pinch-points and ensure UK companies remain viable players in the evolving global green gas market.	Technological progress directly affects biomethane's cost trajectory and its ability to contribute to Net Zero. Lower costs and higher yields mean more projects can be deployed within a given budget, and greater automation could affect the type and number of jobs supported.

Production costs can be reduced by 25% if key barriers are overcome

Lower costs can increase biomethane's economic impact by enabling more deployment and supporting economic growth elsewhere in the economy

Reductions in project costs of more than £20/MWh and growth of revenue can increase biomethane competitiveness by 2050

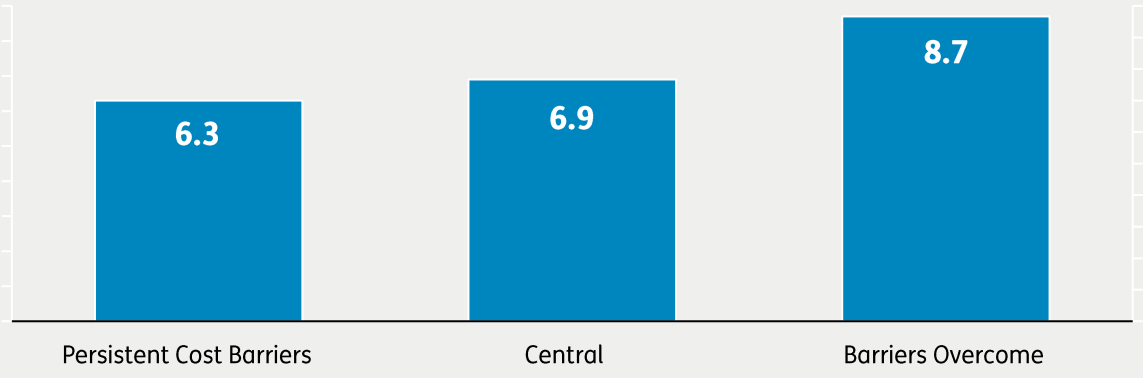
Biomethane production costs and cost reduction potential to 2050 by category

		Description	Cost reduction potential[1]
Capex	**Capital Expenditure**	Up-front cost for AD plants, upgrading infrastructure	£12/ MWh
Capex	**Grid connection**	Costs of connecting to the grid	£1 / MWh
Opex	**Other Operational Expenditure**	Energy costs, site maintenance, and other	£4 / MWh
Opex	**Feedstock**	Ongoing costs to acquire feedstocks to feed AD plant	£2 / MWh
Opex	**Propane**	Ongoing costs to acquire propane for grid injection	£4 / MWh

Notes: : 1. Estimated using Baringa LCOE model for "Barriers Overcome" scenario for a Medium Livestock Waste project, see here for further scenario detail | **Source:** Baringa LCOE Model, Baringa analysis

Biomethane costs influence both the size of the economic contribution and the savings delivered elsewhere in the economy

Average annual system savings delivered for biomethane cost scenarios 2025-2050 (£bn)



For a given level of production, higher costs may increase the economic contribution of the biomethane sector itself but will reduce the savings and investment capacity biomethane deployment delivers elsewhere. However, for a given level of fiscal support, lower costs can increase biomethane's economic impact by enabling more deployment.

Policy must prioritise the most cost-effective production of biomethane for GHG savings

Based on our analysis of the value to the energy system, we previously set out nine recommendations to enable higher volumes of production, reduce production costs and realise the wider value of biomethane

Overview of Policy Recommendations

Enable higher volumes and cost reduction	1	**Clarify Timeline**	**Clarify timelines for the Future Policy Framework and further extend the current GGSS to avoid another hiatus**
	2	**Future Support Mechanism**	Design a policy mechanism which **supports cost-effective GHG savings** and helps facilitate a market for biomethane e.g., through a supplier obligation, without compromising sustainability
	3	**Production Target**	**Formalise a production target** of 20 TWh by 2035 to create a market for biomethane producers to fill the capacity gaps
	4	**UK ETS recognition**	**Recognise biomethane as zero carbon** in the UK Emissions Trading Scheme (ETS)
	5	**Feedstock Evaluation**	Evaluate the **sustainability of non-waste feedstocks** like rotational crops and subsequently broaden waste feedstock thresholds to recognise sustainable feedstocks with limited land use impact
Realise the wider value and supporting competitiveness	6	**GGR Market**	**Facilitate a market for Greenhouse Gas Removals (GGRs)** in the UK, incentivising cost-effective carbon removals from carbon captured via biomethane production and combustion
	7	**Carbon Capture Access**	Provide **access to CCS T&S infrastructure for all biomethane producers** who offer carbon capture
	8	**Propanation Requirement**	Either **reduce or remove** the need for propanation
	9	**Digestate Market**	**Establish a market for digestate** by creating demand support from the farming industry

This analysis identifies further challenges to maximise the economic contribution

To fully capture biomethane's potential, action is needed from stakeholders across government and industry, as well as local communities

	Stakeholder	Challenge
Readying the network	Ofgem	**The network should be future-proofed by facilitating investments to connect and integrate greater volumes of biomethane**, allocating efficient costs and ensuring network access tariffs encourage renewable gas injection. Utilising existing gas network capacity is a key driver of the benefits offered from scaling biomethane, as it avoids the need to build new capacity elsewhere in the system.
Scaling the domestic supply-chain	Project Developers & Suppliers	**Maintain and enhance today's high UK-content share**. Mobilise investment to deliver projects at scale. Work on cost reductions through innovation and standardisation, such as modular AD plant designs.
	Local Communities & Authorities	**Mobilise feedstock and project development and reinforce local economic loops.** Identify opportunities for biomethane in waste management and farming. Support projects through planning and community partnerships.
Supporting worker reskilling	Education & Skills Bodies	**Develop a workforce with diverse expertise to take advantage of the opportunity for biomethane to provide high-quality green jobs.** Align vocational training, college courses, and certification programs with the skills needs of the biomethane sector. Engage apprentices and mid-career workers in programmes for technical skills (welding, electrical) and training specific to biogas facilities.

Great Britain must address gas network integration challenges to scale biomethane

Without the enabling investments to connect sites and adapt operations, the potential for biomethane to delivery economic benefits and support lowest cost decarbonisation will be constrained

Overview of current challenges and options to address

	Current challenges	Options to address
Connecting new AD plants	▲ **High connection and reinforcement costs** Traditionally, the first biomethane developer at a location has had to pay the full cost of any required gas network reinforcement ("first-connector pays") – even if upgrades benefit future projects. ▲ **Complex local planning and permitting processes** for new AD, with community and environmental impact considerations adding another layer of uncertainty.	▲ **Clustering Projects and shared infrastructure:** When multiple AD plants are planned in the same area, treating their grid connections as a coordinated cluster can unlock economies of scale. Instead of each separately paying to upgrade the network, the operator can plan one combined reinforcement that serves all of them, with costs shared. This approach is now being piloted. ▲ **Identification of optimal locations ("Zoning"):** Currently, biomethane project location is mostly driven by feedstock availability and developer initiative. A more top-down planning approach could identify optimal zones for biomethane.
Investing ahead of need for biomethane connections	▲ Although a positive shift from "first mover pays", **RIIO-3 price control "use-it-or-lose-it" allowance to fund biomethane network reinforcement may still constrain connections** ▲ Regulations have focused on minimising short-term consumer costs by only funding capacity upgrades when justified by firm projects. This approach has made it **difficult for networks to build future-proofed capacity** for injections to avoid bottlenecks.	▲ **Ofgem could expand cost-sharing mechanisms**, effectively treating biomethane-related reinforcements as regulated investments recoverable via the network tariff. ▲ **Allow more anticipatory investments for Net Zero needs** (a concept more common in electricity transmission planning). For biomethane, this could mean allowing distribution operators to reinforce networks in areas with high biomethane potential before all plants are formally committed, avoiding delays.
Operating with greater volumes of biomethane	▲ **As biomethane grows, the gas network may need to operate differently.** More distributed gas entry points calls for improved network monitoring and communication systems so that operators can balance flows in real time. ▲ As biomethane is typically injected into lower-pressure distribution grids, **high output can exceed local demand, risking pressure build-up**. Today gas flows from transmission down to distribution but in future bidirectional flow may be required.	▲ **System resilience and flexibility:** Networks could invest in small-scale gas storage or use linepack (gas stored under pressure in pipes) management strategies to store excess biomethane during low demand and release it during peaks. ▲ **Investments smart network control technology and compressors** will ensure that even on warm summer days, biomethane can continue to flow by redirecting it to where demand exists or into storage.

Maintaining and enhancing high UK-content share is a strategic opportunity

As we scale up biomethane production to meet Net Zero goals the UK must deliberately cultivate its domestic biomethane supply chain

Project developers and industry suppliers (such as equipment manufacturers, engineering, construction, and service firms) are pivotal in deciding where and how project value is created. By proactively adopting the following strategies, they can bolster UK content, support local industries, and reduce costs through domestic efficiencies:

Project developers and suppliers

Encourage UK procurement and partnerships	Actively seek out British manufacturers and contractors. In practice, developers can issue tenders that encourage bids with high UK content. *For example, Rolls-Royce's SMR programme targets 70% UK-manufactured components[1]; a similar philosophy in biomethane can ensure tanks, pipes, control systems, and other hardware are produced by UK engineers and fabricators.*
Invest in supply chain capacity and standardisation	Developers and technology suppliers should collaborate to expand UK manufacturing capacity and standardise designs, improving efficiency and enabling economies of scale. One barrier today is that plants are bespoke, limiting repeat manufacturing. Modular, standardised AD plant components can streamline production and reduce unit costs, making UK-made equipment more competitive.
Leverage innovation and R&D	Invest in UK-based innovation to improve technologies across the biomethane chain to boost the competitiveness of domestic solutions. *Project developers can partner with UK universities, Catapult centres, and research institutes on demonstration projects, ensuring that breakthroughs benefit British firms.*

Local communities and governments play a crucial role in unlocking sites, feedstocks, and public support for biomethane. By actively participating in project development and aligning local policies with biomethane supply chain growth, communities and councils can drive job creation and retain wealth locally.

Local communities and local authorities

Facilitate feedstock mobilisation and project siting	Local authorities can act as coordinators of feedstock supply and project siting. Partnerships, with local authorities providing land, waste supply contracts, or planning support, and developers bringing capital and technology, can ensure the resulting plant directly uses local inputs and labour. Councils can also map agricultural and industrial waste in their area and invite investors.
Maximise local use of biomethane outputs	To reinforce local economic loops, encourage use of biomethane and its coproducts within the local economy. Local agriculture can utilise the digestate bio-fertiliser produced by AD plants, reducing the need for imported synthetic fertilisers. Many AD facilities supply digestate to nearby farms, but local authorities can help formalise these links.
Integrate biomethane into economic development and skills initiatives	Councils can ensure their area captures its share of green jobs by including biomethane in local economic plans such as city-region climate action plans or local industrial strategies. *For instance, if a region has a strong agriculture or food processing base, the local plan could designate "Energy-from-Waste Enterprise Zones" offering business rate relief or expedited permits for AD facilities and related manufacturers.*

Source: Written evidence from UKRI and the UKRI Low Cost Nuclear Challenge, 2022

The multi-faceted supply chain presents an enormous opportunity for green job creation

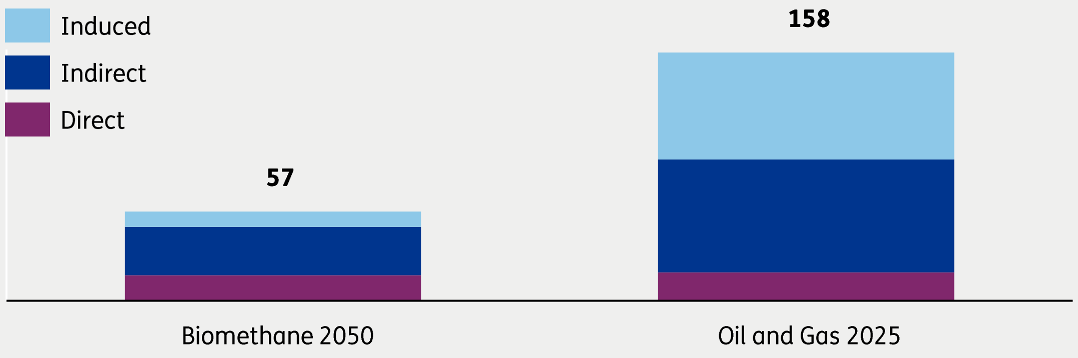
It also highlights a complex challenge: success will depend on developing a workforce with diverse expertise

Skills needs are increasingly recognised in UK policy and the biomethane sector should tap into these initiatives

Key skill	Scale of challenge	Links to wider ambition
Engineering and project delivery	The scale of the challenge is significant – engineering and project delivery roles are in short supply across the entire UK clean energy sector	DESNZ 2025 assessment identified specialist engineers (civil, mechanical, electrical, etc.) as "high demand occupations" for the Net Zero transition. Moreover, many of these professionals are also needed in other industries (e.g. offshore wind, nuclear and hydrogen).
Skilled trades	A shortage of qualified tradespeople – welders, pipefitters, electrician and instrument technicians threatens to slow biomethane growth.	The Clean Energy Jobs Plan includes a £625 million Skills Package for construction trades and support for fast-track training of tradespeople for green industries
AD Plant operations and processes	AD-specific training has been niche with many current operators learning on the job. As the sector grows an order of magnitude, bespoke training programs are needed to ensure consistent, high standards.	The Green Jobs Delivery Group has identified a need for more certified plant operators and safety specialists in emerging green sub-sectors like hydrogen and biomethane and is working on fast-track training pathways.

Biomethane skills requirements strongly overlap with oil and gas operations

Modelled biomethane employment 2050 and estimated oil and gas sector employment 2025 ('000s jobs)



- The biomethane sector could provide employment opportunities for gas engineers, plant operators, maintenance technicians, safety specialists, and process engineers
- We should build on the initial progress of the Energy Skills Passport and other cross-sector training initiatives, increasing the focus on biomethane, to enable seamless skills transfer and flexible deployment of people across the energy supply chain.

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Baringa

Biomethane:
Building Sustainable UK Value

April 2026

baringa.com

Building Sustainable UK Value

The Green Gas Taskforce is a collaboration between seventeen of GB's largest biomethane generators, shippers and traders, all five British gas networks, and four important industry organisations. The Taskforce will be producing a series of key reports and analysis, outlining the scope for growth of biomethane in Great Britain and the significant contribution it can deliver to the decarbonisation and energy security of the country.

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Your Gas Network

Green Gas
TASKFORCE