



bioGem Express AG

Zähringerstrasse 26

CH-8001 Zurich

2026 Micro-Conference
Outlook van BGX

Waar gaan de markten heen?
Hoe passen LNG en schepen erin?

Denemarken.
BioLens

Biddinghuizen 5 Februari 2026
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Marcel CH

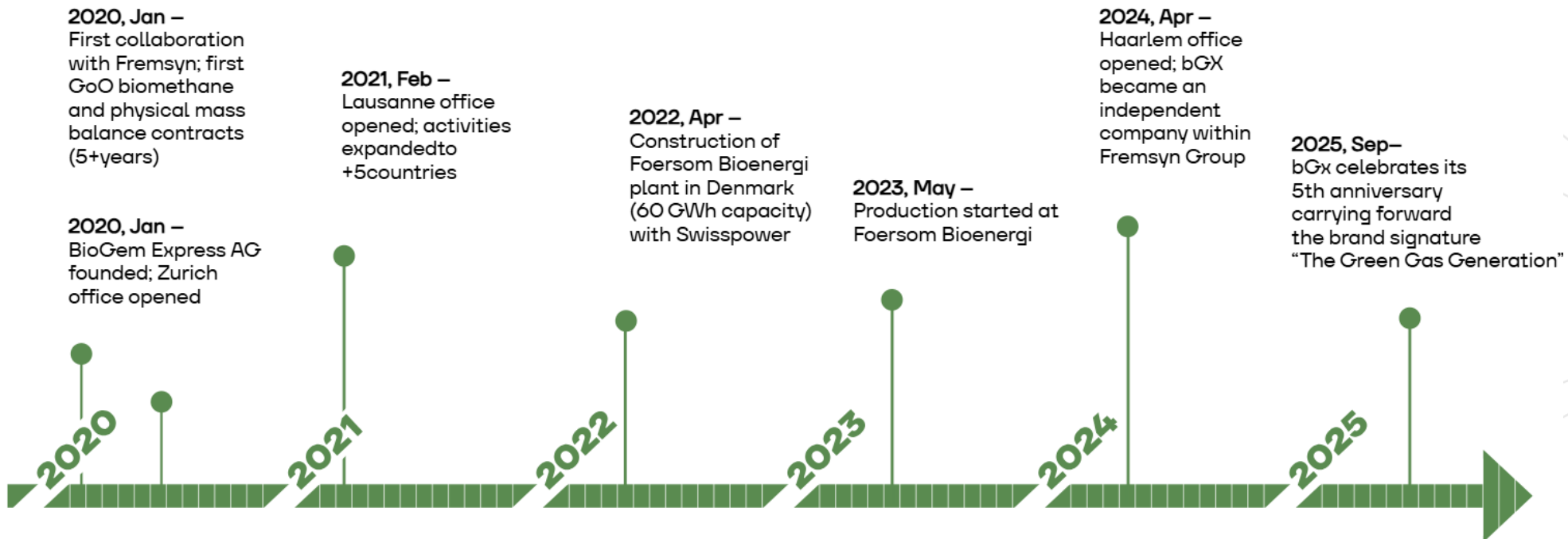
— bGX Milestones



50+ clients *already rely on bGX solutions*

5TWh+ *of biomethane under contract*

~1 mln tons of CO2 avoided
compared to natural gas



- 200 GWh eigen productie, > 60 medewerkers
- Laboratorium, Certificering, trading in DK en CH
- Kantoren Haarlem, Kopenhagen, Lausanne, Zurich HK



— Uw contact persoon voor Benelux



Wat kan BGX voor U betekenen?

- 100% BioMethane trader.
- Aangename contacten, partner.
- Langere contracten
- Thuis in regulatory markten, mn CH

- Wij regelen de complexe zaken, U krijgt het resultaat:
 - Gesubsidieerd of niet.
 - Massbalance en fysiek gas
 - Feedstock en emissie eisen
 - Certificeringen, ISCC, NSM e.a.



Frederik Gast
Business Developer

With over 15 years in biomethane as a producer, developer, and association leader, Frederik offers a 360° view of the sector. He helps you position your projects for success in both local and international markets.

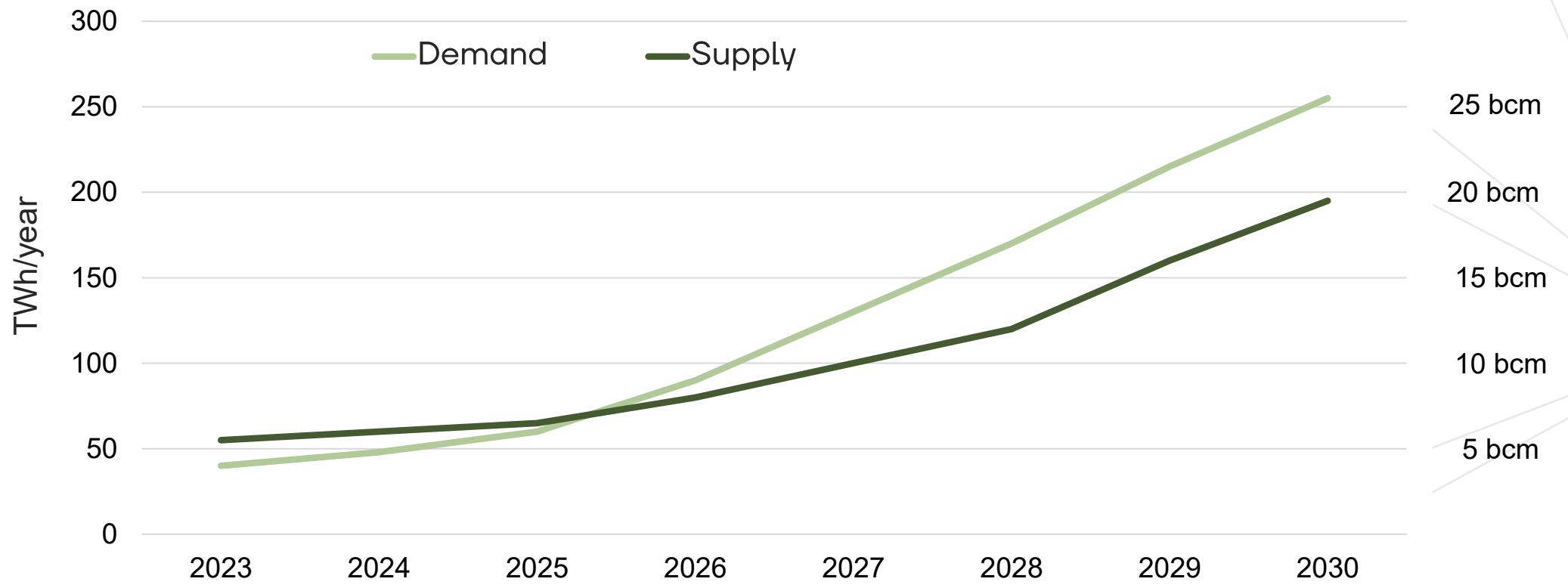
Opgegroeid in Vlaanderen

- Sinds 2005 actief in BioMethaan.
- Partner in een BioMethaan vergister
- EBA bestuur 2018-2022.
- Ver Groen Gas Producenten voorzitter sinds 2010
- Nederlands, Frans, Duits Engels
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EU Outlook On Volume

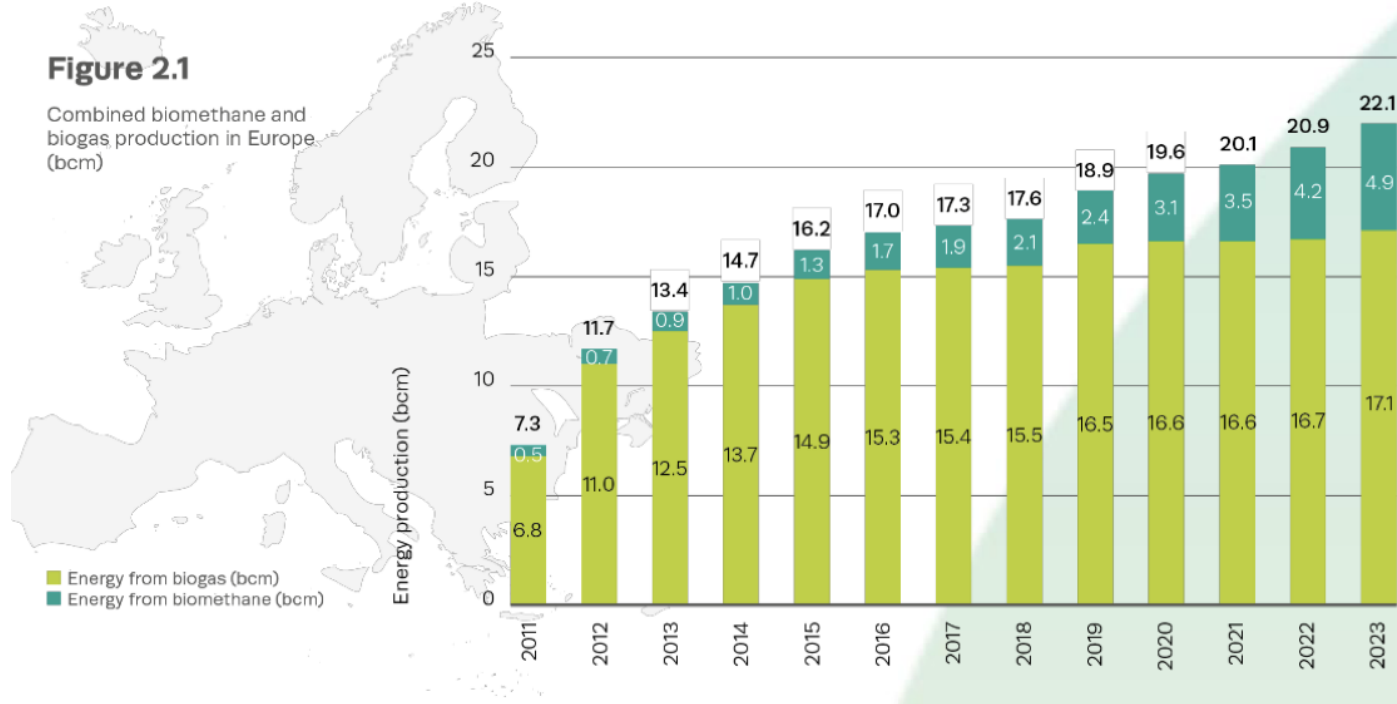


EU biomethane projections



Source: European Biogas Association (EBA), BioGem Express (bGX)

— Production Growth



Combined biogas and biomethane production in Europe

(EBA Statistical Report 2024)

Source: European Biomethane Association (EBA)

RED III Implementatie Landschap CI vs MWh, LNG b G X

RED III transposition – State of the art

Transport target choice	Countries	N.
29% share of RES	BE, HR, FI, HU, IE, PL, SK	7
14,5% GHG Intensity Reduction	CZ, FR, DE, LV, NL, ES	6
Unknown	AT, DK, EE, IT, PT	5
Both	EL, SE	2

Notes

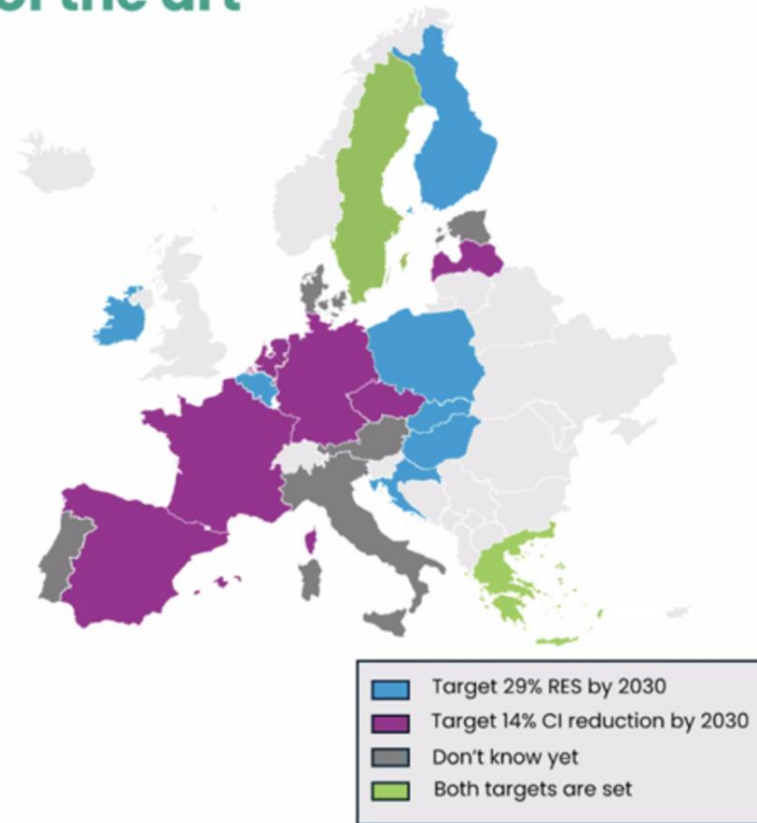
HR - Exact target is 24.6% RES share.

FI - The 29% target has been incorporated into national law since December 2024. The legislation sets annual RES targets from 2020 to 2030, with a 34% RES target for 2030 and beyond.

DE - the national law sets an even higher target, aiming for a 25% GHG intensity reduction by 2030.

HU - intends to reduce the 29% target to 25%, as allowed by article 26, §1 RED.

LV - Exact target is 16% GHG intensity reduction.



Bio-LNG

- On-site NL
- Recondensation
- Equivalence

Gaat naar

- Weg transport
- Schepen
 - > 800 Duel Fuel nu
 - > 800 Besteld

Source: European Biomethane Association (EBA)

RED III implementatie landschap : Timing

RED III transposition – State of the art

RED III transposition	Countries	N.
Within the deadline	CZ, DK, HU, BE (Flanders)	4
After the deadline	AT, BE, HR, EE, FI, FR, DE, EL, IE, IT, LV, NL, PL, PT, SK, ES, SE	17

Notes

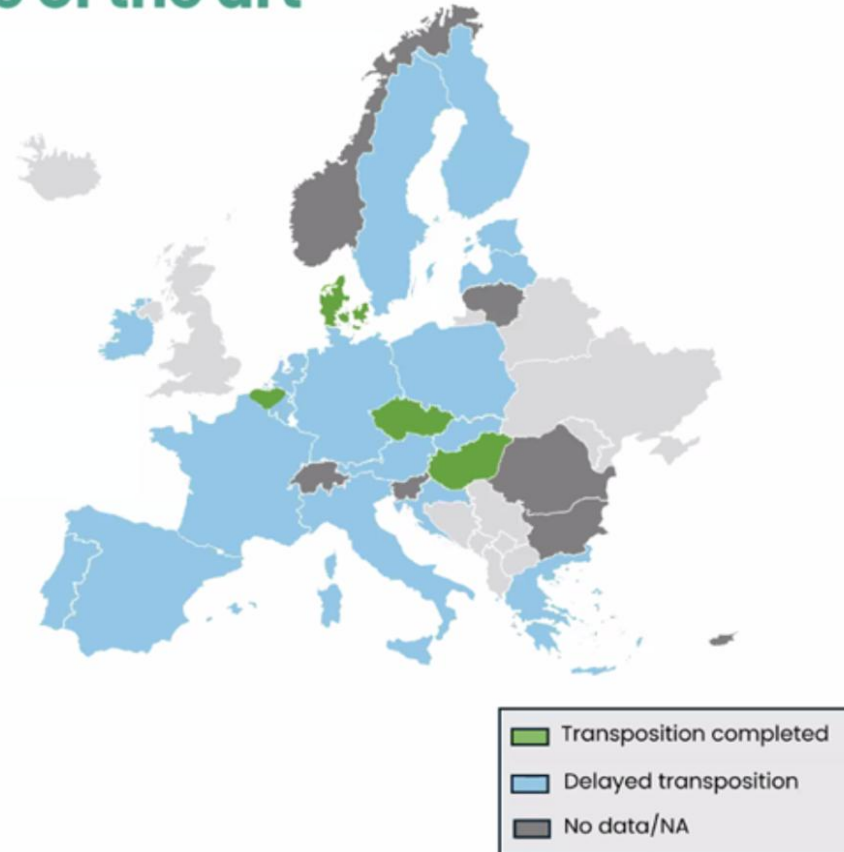
No EU country – apart from CZ, HU, DK and the Flemish regional administration – reported being fully on track with RED III transposition.

Some countries (CZ, DK, SE) will implement the new law by July 1.

Others (HR, EE, FR, IT, NL) expect an adoption by the end of the year.

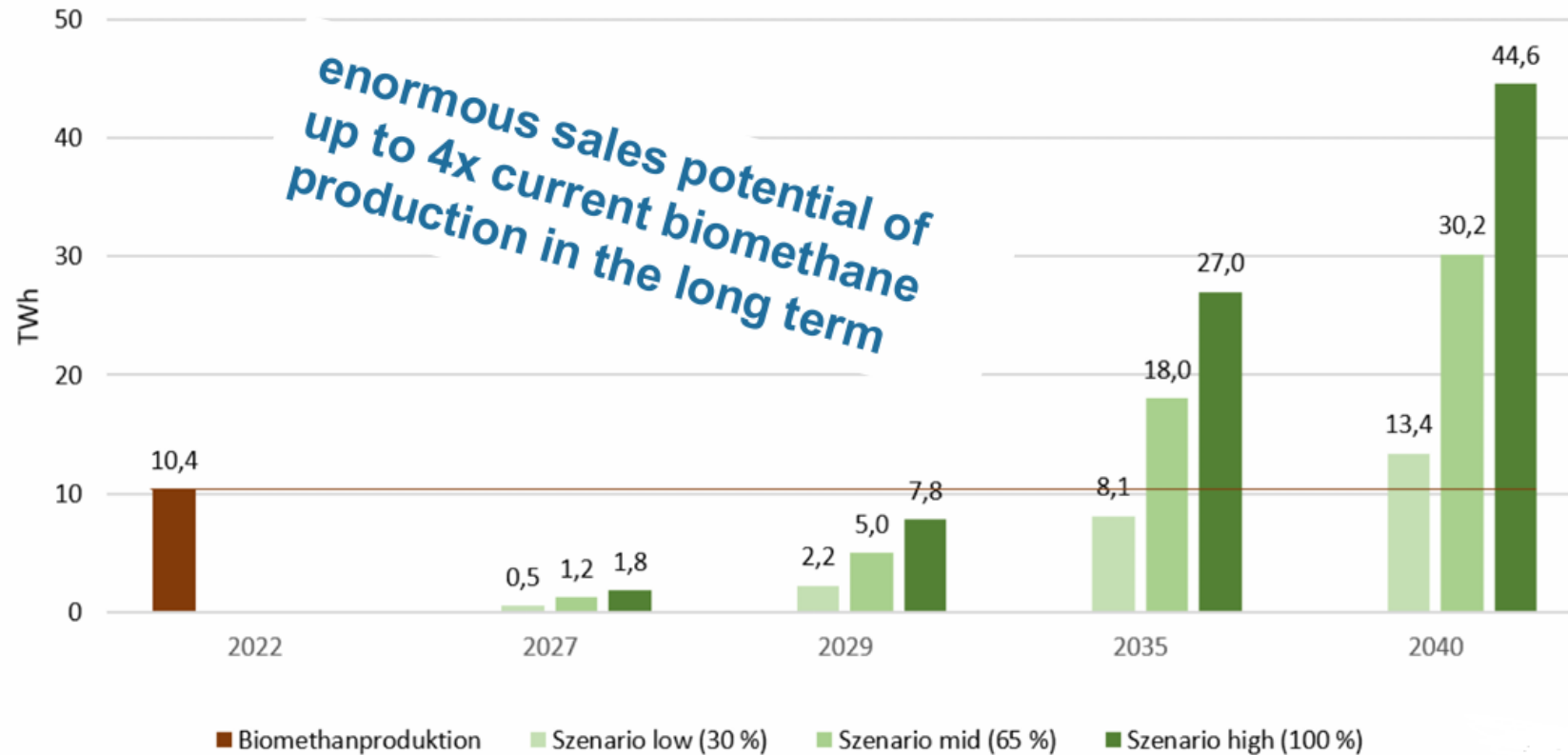
In some cases (LV), there is a risk the law won't be transposed by the end of this year either.

In most countries the timeline remains entirely uncertain.



Source: European Biomethane Association (EBA)

GEG: Market Size



Source: Deutsche Energie-Agentur (dena)

Germany's BEHG: Carbon Revenue Trends

BEHG: Bundesemissionshandelsgesetz

Kosten für Emissionszertifikate



- Companies (heat generation, transport, waste incineration) that place the fuels on the market are the obligated to adhere to the BEHG framework
- They must acquire pollution rights in the form of certificates ('upstream emissions trading')

Source: Axpo

— Zwitserland

b G X

- Kader

- Pronova : National biomethane register sinds Jan 1 2025
- In verlengde van andere landen voor grensoverschrijdend : AIB-lid sinds 1/1/26
- Subsidie of niet ligt bij koper
- Certificering : OZ compliant
- GHG niet van toepassing
- Fysieke levering ligt bij klant

- Markt

- Langere contracten 3-5 jaar
- Momenteel minder
- 2027 en verder veel vraag
- Meer belangstelling voor ongesubsidieerd

— Shipping GHG – Reduction Frameworks

b G X

RED III Transport Fuels 2026 -2030

Voortzetting RED II met:

- Uitbreiding scheep vaart
- GHG ipv van Threshold van 23 g
- Combineert met Fuel EU

Beperkingen

- Ongesubsidieerd
- Concurrereert/mengt met andere biofuels

Fuel Maritime EU 2025-2030

GHG intensity of energy used on board ships,

2025: 89.3 gCO₂e/MJ (2% reduction from the 2020 baseline).

2030: 85.7 gCO₂e/MJ (6% reduction).

2050: 18.2 gCO₂e/MJ (80% reduction).

Biomethane must at least 70% GHG emissions savings compared to fossil fuels.

Heel populair

- Subsidie toegestaan, alleen POS
- Andere BioFuels kennen geen negative CI
- Beperkingen : minstens -/ - 50 vanwege beperkte LNG afname

— Het wordt spannend in de Benelux

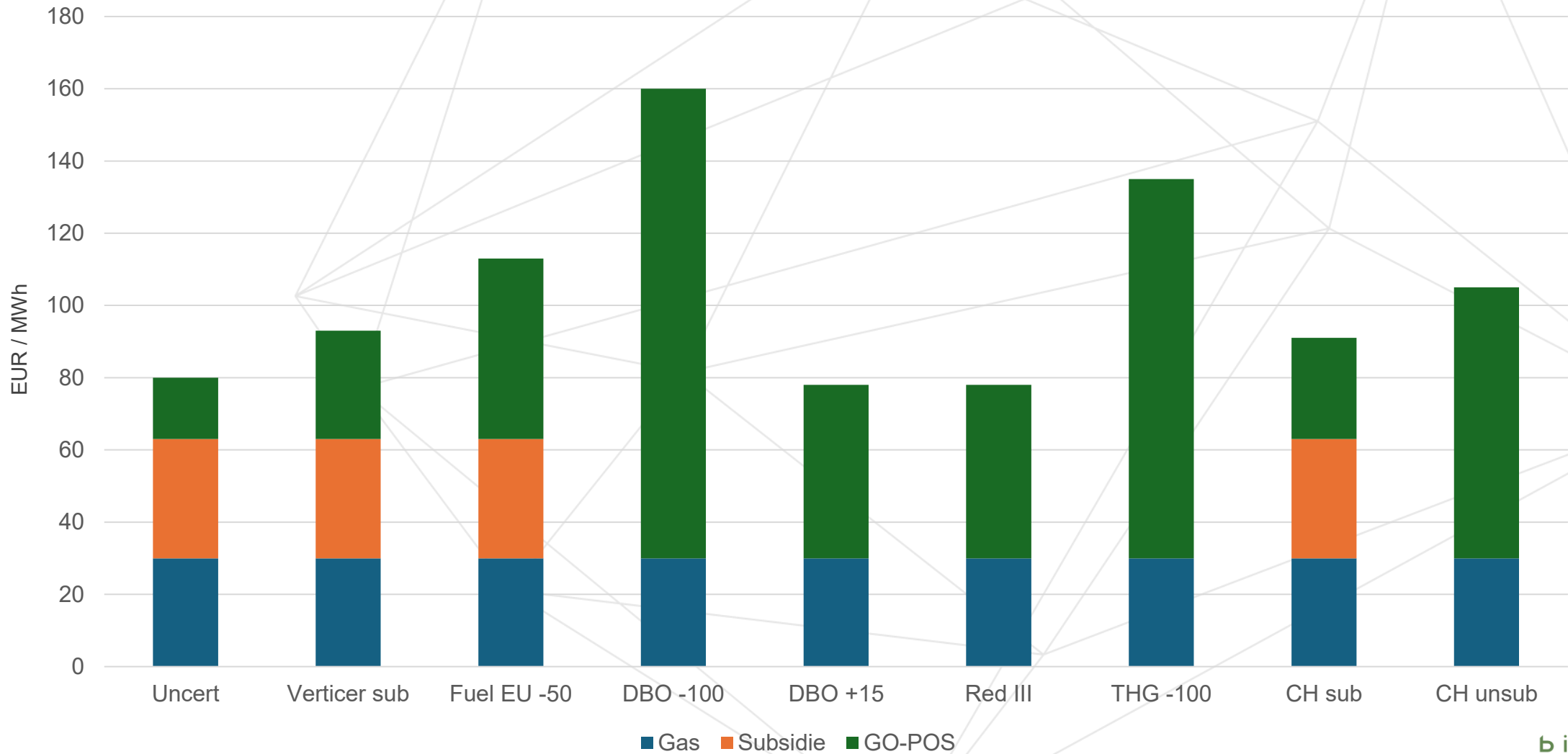


Belgie	Nederland	<i>Nederland</i>	<i>Belgie</i>	Europa	Europa
Status	Ingevoerd	<i>Verwacht</i>	<i>Verwacht</i>	Ingevoerd	Ingevoerd
Kader	Red III 2026	<i>Bijmengplicht 2027</i>	<i>RED III 2027?</i>	Fuel Maritime EU 2025	EU-ETS
Beloning	€/g CO2	€/g CO2	€/MWh	€/g CO2	€/MWh
Import	Toegestaan	<i>Toegestaan</i>	<i>Toegestaan</i>	NVT	Toegestaan
Levering	GO+POS	<i>GO+POS</i>	<i>GO+POS</i>	GO+POS	GO+POS
Certificering	EU - RED	<i>EU - RED</i>	<i>EU - RED</i>	EU - RED	EU - RED
Bio-LNG	Fysiek	<i>NVT</i>	<i>Mass-balanced</i>	Mass-balanced	Mass-balanced
Gesubsideerd	Nee	<i>Nee</i>	<i>Ja? Nee?</i>	Ja	Ja

Het wordt spannend in de Benelux

- Gaat Vlaamse GO met hoge CO2 besparing naar NL?
- Gaat Nederlandse GO met lager CO2 besparing naar B?
- Aan hoge ongesubsidieerde negatieve CO2 zal Duitsland nog blijven trekken.
- ETS en ETS 2?

__ Wat brengt BioMethaan op? (inc subsidie en gas)



Source: BioGem Express (bGX) estimates

— Vooruitblik

b G X

- Markten voorlopig volatieler
 - Targets bewegen met verbruik (DBO, RED III, ETS 1, ETS 2)
 - Regulatorie kaders bewegen voortduren (DBO, RED III EU, ETS 2)
 - Weinig aanbod harde lange contracten.
 - Ontwikkelaars-Ondernemers lange contracten voorwaarde
- Stagnatie groei
- Markt risico kruipt naar producenten
- Kosten compliance nemen toe
- Grote vraag voorspeld, maar alleen in Shipping EU voelbaar (ander biofuels geen negative CI)

BIOGAS WITH FULL TRANSPARENCY

BioLens – Digital traceability and compliance for biogas

For end customers:

- > Gain insights into your consumption reports
- > Download your PoS (Proof of Sustainability)
- > View your Guarantees of Origin (GoO)
- > Get an overview of the used biomass mix
- > Document your CO₂ footprint with a single click
- > Easily download data for your ESG reporting

For biogas producers:

- > Calculate CO₂ emissions and biogas yield
- > Auto-upload to the Union database (2026)
- > 100% data integrity – no double counting
- > Certification and reporting with one click
- > Intuitive and user-friendly data access
- > Automatic mass balance and PoS



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two target groups.**

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