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ABN 49 138 085 551



LGI Limited

H1 FY25 Results

14 FEBRUARY 2025



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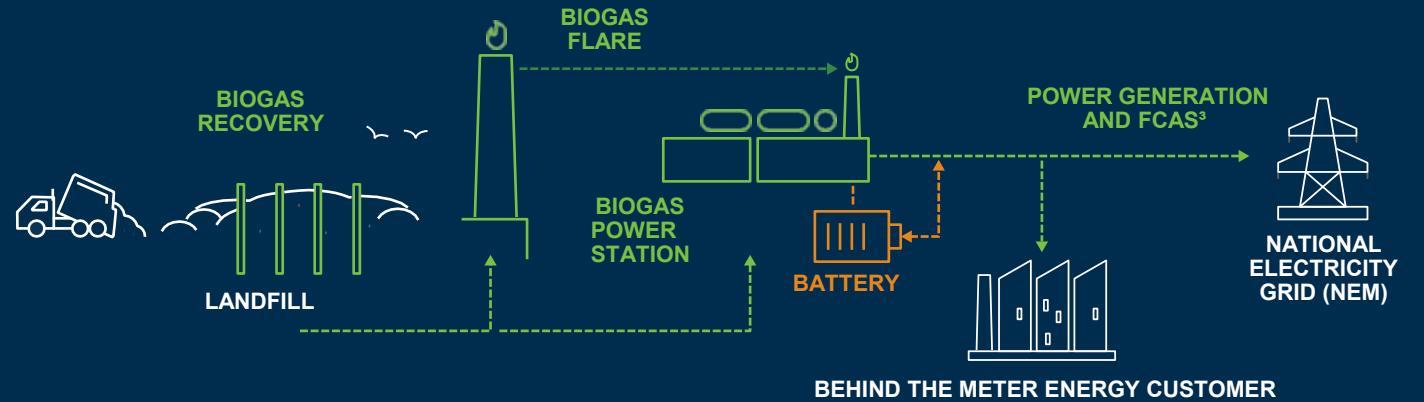
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Who is LGI?

One of Australia's leading vertically integrated landfill gas companies

Founded in 2009 (as Landfill Gas Industries Pty Ltd), LGI is an established domestic leader in the recovery of biogas from landfill, and subsequent conversion into renewable electricity and saleable environmental products



With vertically integrated operations, LGI solutions provide diversified revenue streams, generated from three key sources:

SITE INFRASTRUCTURE AND MANAGEMENT

Installation, operation and maintenance of biogas extraction infrastructure and flaring systems for landfill owners, under service agreement only

LGI revenue derived from fee-based work

GREENHOUSE GAS ABATEMENT

Installation of flaring systems on landfills for creation of ACCUs¹, similarly long-term agreements

LGI revenue derived from the creation and sale of ACCUs¹

RENEWABLE ELECTRICITY

Installation of build-own-operate power generation systems on landfills – typically long-term agreements (15+ years), with high quality customer base (majority local governments)

LGI revenue derived from the sale of electricity, LGCs² & ACCUs¹

H1 FY25 RESULTS

Results Highlights

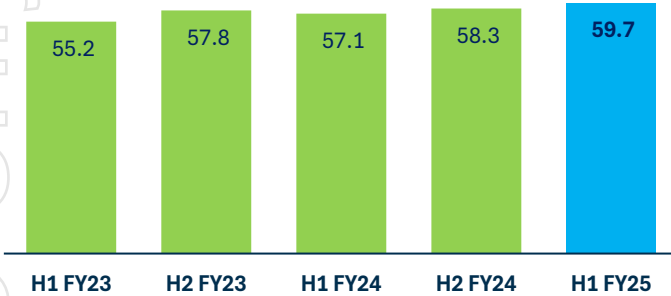


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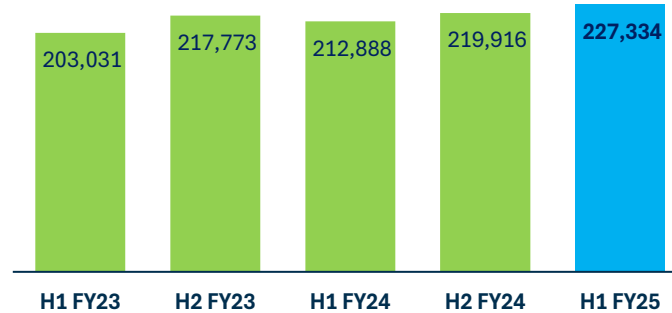


Key Operational and Financial Information

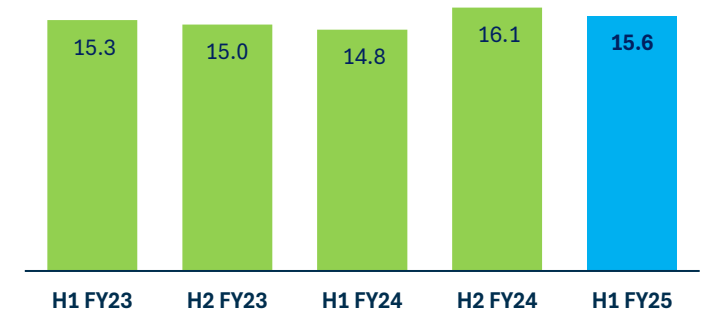
BIOGAS FLOWS (MCM)



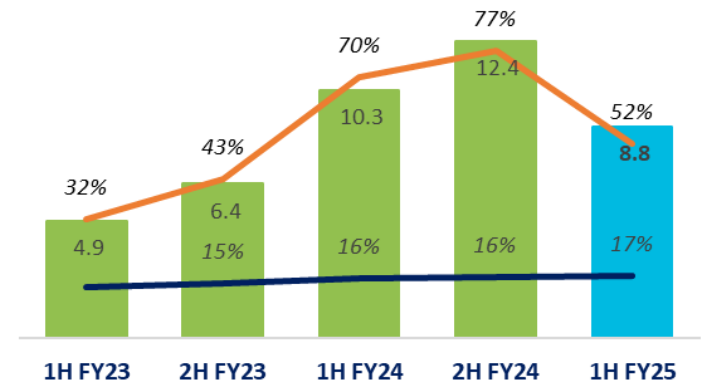
ACCU CREATION



NET REVENUE (\$M) ²

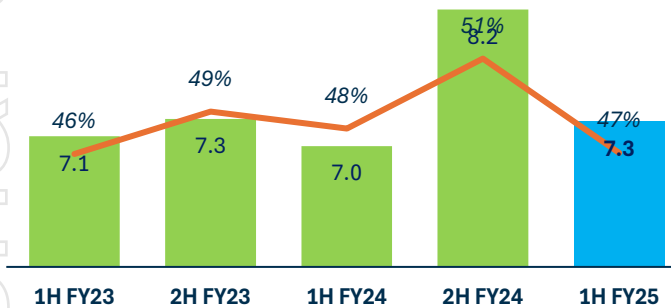


CAPEX (\$M), CAPEX AS A % OF REVENUE, DEPRECIATION AND AMORTISATION AS A % OF REV.

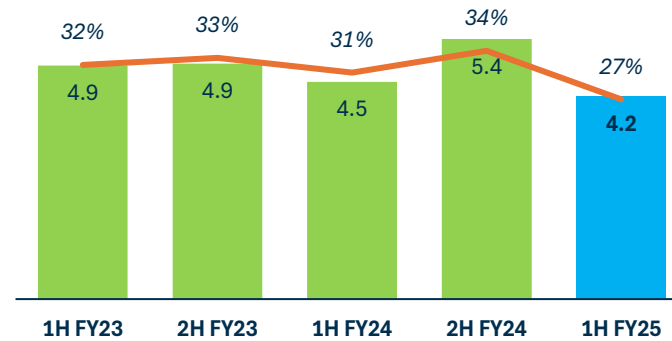


■ Capex (\$M)
 — Capex as a % of rev
— Dep'n and Amort'n as a % of rev

UNDERLYING EBITDA¹ (\$M), MARGIN



UNDERLYING EBIT¹ (\$M), MARGIN



1. Underlying numbers excluding IPO costs and any significant items.
 2. Net revenue removes the value of the ACCUs provided to landfill owners as in-kind satisfaction of royalty payments

Geographic Footprint

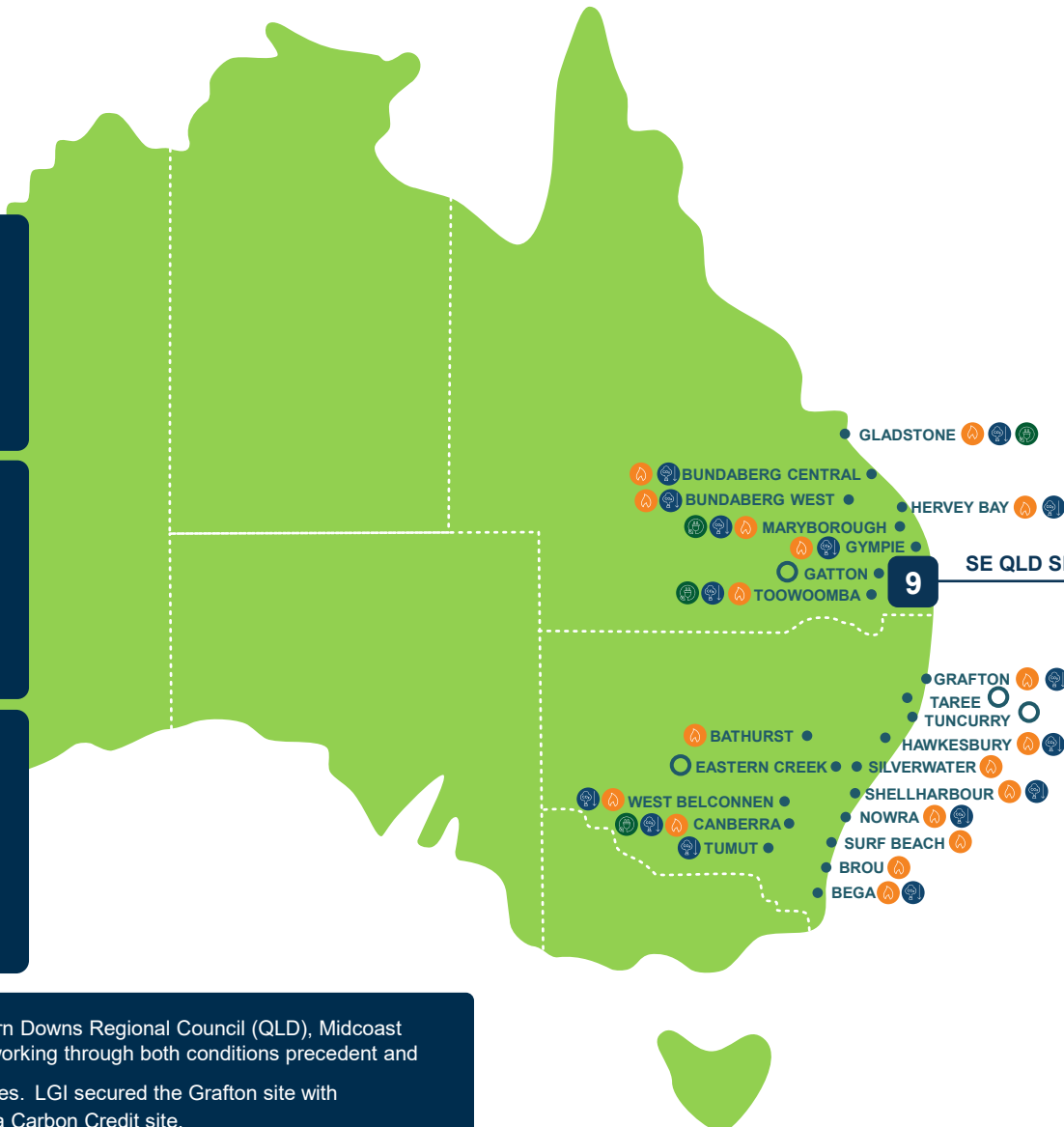
Expanding network of landfill, generation and carbon sites

 **32** Contracted sites¹






 **08** Power stations

 **17** Carbon Credit sites












During H1 FY25, LGI agreed contract terms with Lithgow Council (NSW), Southern Downs Regional Council (QLD), Midcoast Council (NSW) and Western Downs Council (QLD). For these contracts, LGI is working through both conditions precedent and CER project registration before finalising an investment case on each of these sites. LGI secured the Grafton site with Clarence Valley Council converting it from an operation and maintenance site to a Carbon Credit site.



KEY

-  BIOGAS FLARE
-  GENERATORS ON SITE
-  CARBON SITES
-  BATTERY
-  CONTRACTED SITE UNDER ASSESSMENT

SE QLD SITES

CABOOLTURE		
NUDGEES		
DAKABIN		
BUNYA		
KEDRON		
CHANDLER		
WILLAWONG		
FITZGIBBON		
ESK		



1. Sites as at 7 February 2025 where all contract conditions precedent have been satisfied and the site is approved by the CER as a carbon abatement site.

H1 FY25 RESULTS

Financial Performance

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Profitability and Return

Modest improvement in revenue & EBITDA, increase in depreciation and interest costs.



Tumut NSW

H1 FY25 revenue and EBITDA benefited from additional generation from the Canberra power station new generators, increased grid connection and energy output in November 2024.

Step-up in depreciation due to Canberra power station upgrade now included as depreciating asset.

Additional capex has been partially debt-funded, resulting in an increase in interest expense.

\$'000	H1 FY25	H1 FY24	% Change
Statutory Revenue And Other Income (excl. Interest Income)	16,911	15,851	6.7%
Net Revenue ¹	15,560	14,769	5.4%
Statutory and Underlying EBITDA	7,260	7,048	3.0%
Depreciation and Amortisation	3,045	2,524	20.6%
Statutory and Underlying EBIT	4,215	4,524	-6.8%
Net Interest Expense	992	381	160.4%
Tax	821	1,044	-21.4%
Statutory and Underlying Net Profit After Tax (NPAT)	2,402	3,099	-22.5%
Underlying EBITDA Margin ¹ (%)	46.7%	47.7%	-106 bps
Underlying EBIT Margin ¹ (%)	27.1%	30.6%	-354 bps
Statutory Diluted Earnings Per Share (Cents)	2.7	3.5	-22.9%
Dividend (Cents)	1.2	1.2	0.0%

Revenue

Revenue contribution growing across multiple sources

\$'000	H1 FY25	H1 FY24	% Change
Electricity (including hedge position and FCAS)	6,081	6,901	-12%
Renewable Large Scale Generation Certificates (LGCs)	1,161	1,436	-19%
Net Carbon Abatement (ACCUs) ¹	7,214	5,083	42%
Infrastructure Construction And Site Management	1,062	1,296	-18%
All Other Revenue (excluding interest)	42	-	
Total Net Revenue	15,560	14,716	5.4%

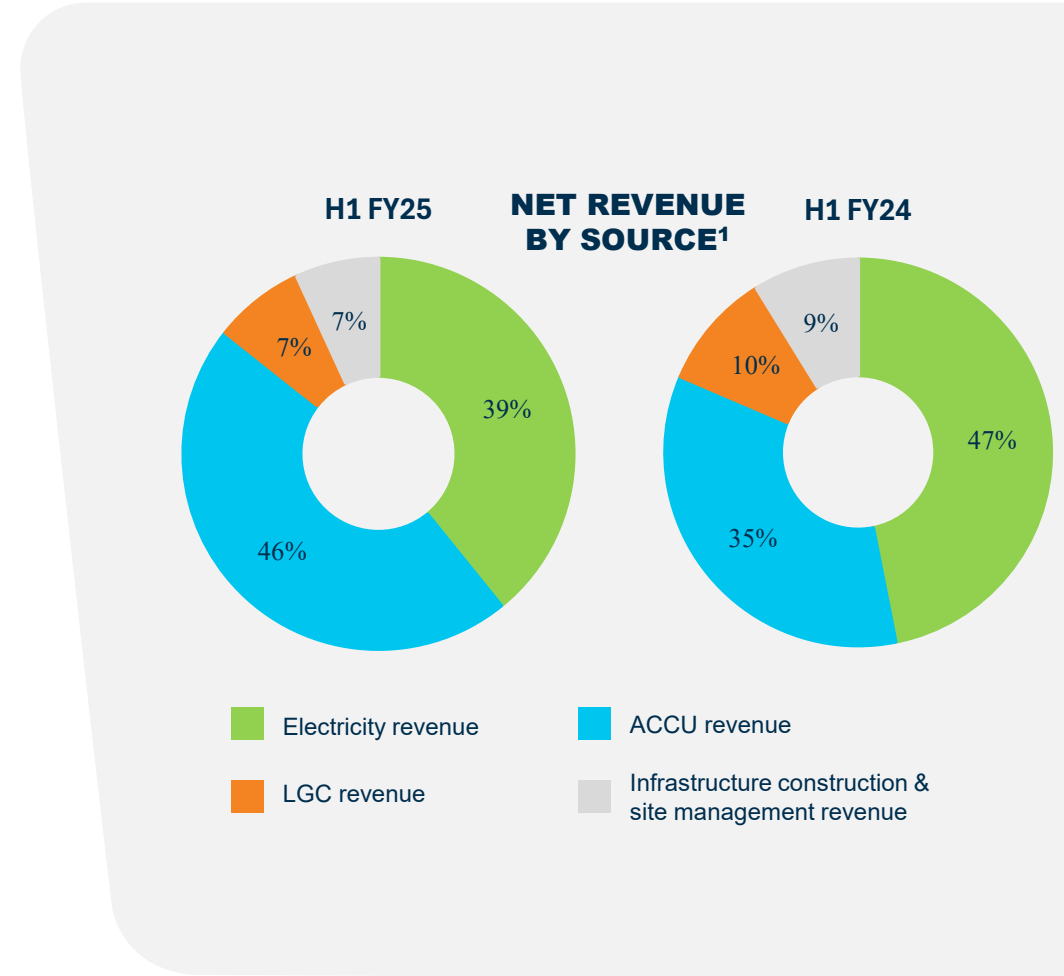
H1 FY25 total revenue **+5%** versus H1 FY24

H1 FY25 revenue skewed towards ACCU revenue as a result of increased ACCU pricing throughout the half with spot prices reaching a 2 year high of \$41.53 in November 2024.

Electricity hedge pricing for H1 FY24 continued to be influenced by the energy crisis in 2022. The influence of the energy crisis has abated with electricity hedge prices in H1 FY25 returning to levels in line with electricity wholesale prices.

The LGC scheme finishes in 2030, and each forward year pricing decreases as we approach the end of the scheme.

With Canberra power station upgrade now commissioned, the electricity segment is expected to increase in the coming six months.



1. Net revenue removes the value of the ACCUs provided to landfill owners as in-kind satisfaction of royalty payments.

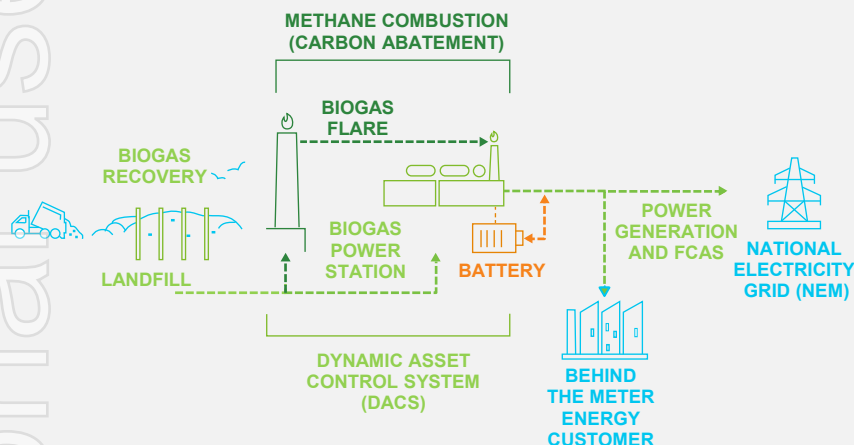
Generation¹ – Electricity and LGCs

Underlying growth in MWhs

Late in H1 FY25, LGI commissioned a 50% increase in its Canberra Power Station and is forecasting for Eastern Creek Sydney (BINGO) 4MW power station to come on-line in H2 FY25.

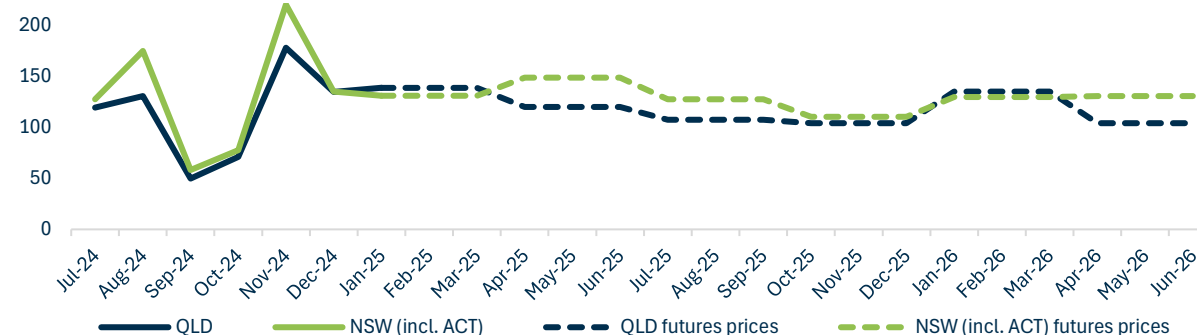
Collectively, this will result in an increase in the MWhs generated during H2 FY25.

The National Electricity Market includes the Australian Capital Territory with New South Wales for wholesale pricing.



\$'000	H1 FY25	H1 FY24	% Change
Operation Metrics			
Biogas Flows ² (M cubic meters)	41.8	40.9	2.2%
MWhs Generated	49,953	46,695	7.0%
LGCs Created	49,186	46,118	6.7%
Profitability			
Electricity (including hedge position and FCAS) (\$'000)	6,081	6,901	-11.9%
LGC revenue (\$'000)	1,161	1,436	-19.1%
Total Revenue	7,242	8,337	-13.1%
Total Revenue Growth (%)	-13%		
Gross Margin (\$'000)	5,089	6,011	-15.3%
Gross Margin Percentage (%)	70%	72%	-183 bps

ACTUAL & FORWARD ELECTRICITY PRICES (\$/MWh)



1. The Generation segment includes all revenue and costs associated with the creation of electricity revenue (all generation sites). Where a site started generating electricity during the period, it is only included in this segment for the months after it started generating electricity.
2. Gas flows are included for all generation sites. At a number of sites, both electricity generation and carbon abatement occurs. The gas flows for these sites is included in both segments.
3. Source: Actual prices (AEMO, <https://aemo.com.au/en/energy-systems/electricity/national-electricity-market-nem/data-nem/data-dashboard-nem>), forward prices (ASX, https://www.asxenergy.com.au/futures_au)

Carbon Abatement¹ – ACCUs

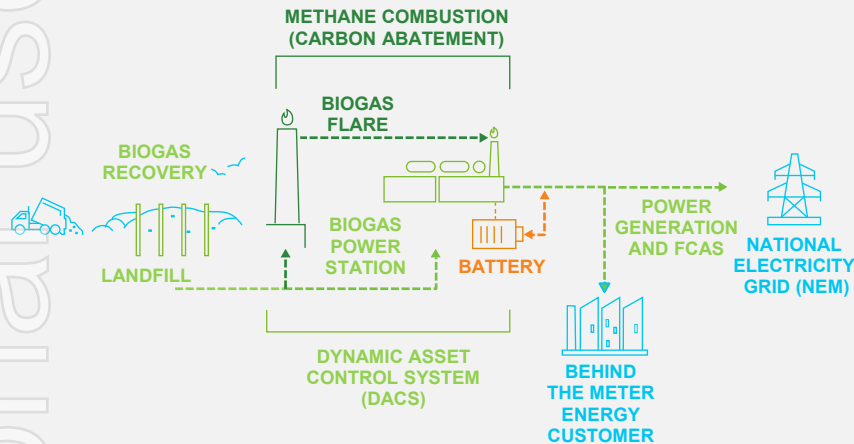
Ongoing ACCU volume growth



Regular field tuning is key to maximising biogas

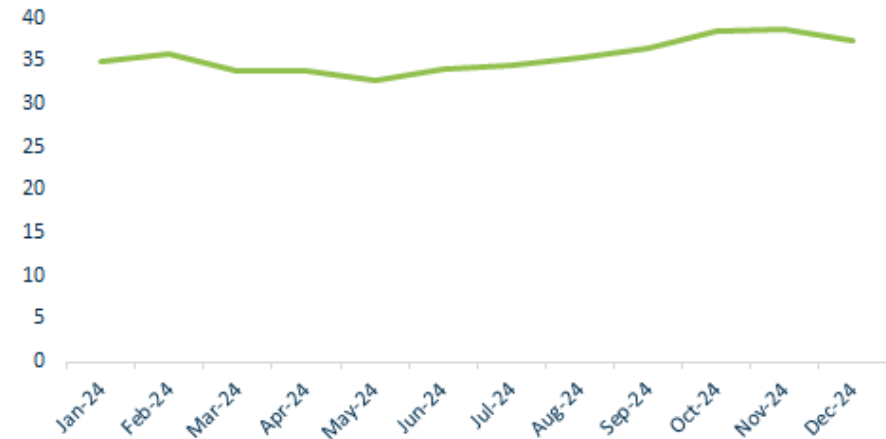
ACCU integrity improvements will result in changes to the method LGI claims ACCUs. LGI is involved in industry consultations on these changes.

LGI's business model of diversity of revenue streams means that LGI has the flexibility to release ACCUs to support capex cashflow requirements.



\$'000	H1 FY25	H1 FY24	% Change
Operation Metrics			
Biogas Flows ² (M cubic meters)	48.4	46.9	3.2%
ACCUs Created	227,334	212,888	6.8%
Profitability			
ACCU revenue	8,565	6,165	38.9%
Total Revenue Growth (%)	39%		
Gross Margin	6,503	4,976	30.7%
Gross Margin Percentage (%)	76%	81%	-479 bps

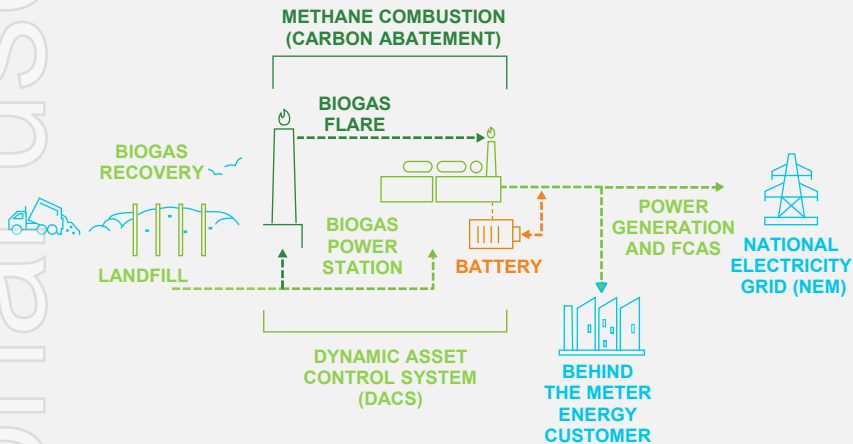
ACCU SPOT PRICE (\$/ACCU)



1. The Carbon Abatement segment includes all revenue and costs associated with the creation of ACCUs (most generation sites and flaring sites). Where a site starts carbon abatement during the period, it is included in this segment from the months it started creating ACCUs.
2. Gas flows are included for all carbon abatement sites. This will include both electricity generation and flaring sites. The gas flows for generation sites will be included in both segments.
3. Source: <https://www.reputex.com/>

Infrastructure Construction & Landfill Gas Management

LGI as a trusted infrastructure partner



\$'000	H1 FY25	H1 FY24	% Change
Profitability			
Infrastructure construction revenue	707	1,035	-31.7%
Landfill Gas Management revenue	355	261	36.0%
Total Revenue	1,062	1,296	-18.0%
Total Revenue Growth (%)	-18%		
Gross Margin	670	523	28.1%
Gross Margin Percentage (%)	63%	40%	2,275 bps

Balance Sheet

Continued growth in asset base

LGI assets growth principally funded by operating cash flow, with the main operational cash flow coming from sale of ACCUs.

Modest increase in debt position leaves substantial headroom in the total debt facility (\$49 million limit).



The team after completing system upgrades at our new Grafton site

\$'000	31 Dec 24	30 Jun 24	31 Dec 23
Assets			
Cash	1,936	2,438	7,680
Trade Receivables	846	876	1,535
ACCU Environmental Certificates	14,483	14,035	8,470
LGC Environmental Certificates	423	957	455
Property Plant & Equipment	64,071	57,360	50,694
Goodwill	314	314	314
Other Receivables and Other Assets	12,517	12,611	8,765
Total Assets	94,591	88,591	77,913
Liabilities			
Trade Payables	4,571	3,722	2,329
Lease Liabilities	3,295	3,077	407
Debt Facility	23,986	19,200	15,751
Other Payables and Other Liabilities	8,829	9,789	7,739
Total Liabilities	40,681	35,788	26,226
Equity			
Issued Shares	33,660	32,231	31,928
Reserves and Other Equity Items	(1,387)	197	1,893
Retained Earnings	21,637	20,375	17,865
Total Equity	53,910	52,803	51,686

Cash flow

Operating cashflow positive while growth investment continues

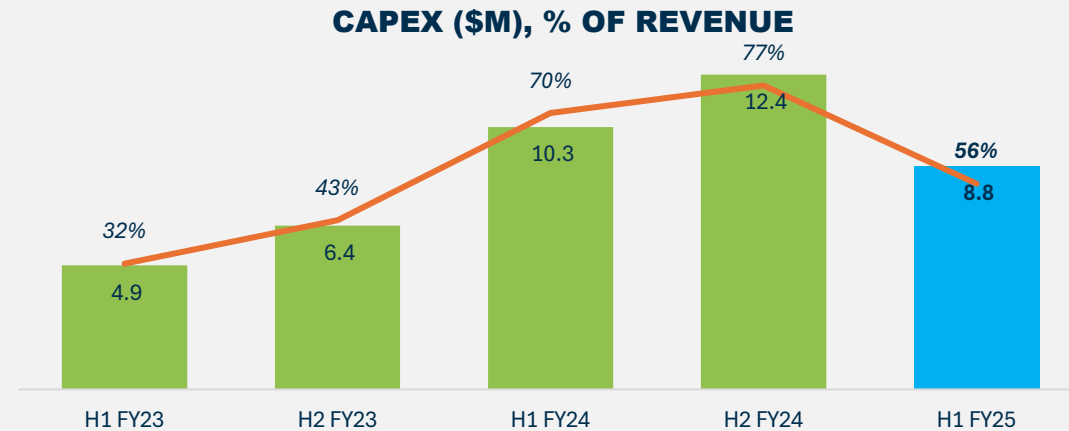
LGI's capital requirements are reflective of LGIs pipeline growth opportunities.

LGI has invested in power station equipment throughout H1 FY25, including payments for generators, switch gear, flare assets and gas extraction pipework.

Capex in FY24 included early works and one-off contract payments for the Canberra and Eastern Creek sites.

H1 FY25 capex primarily funded from operating cashflows and financing activities.

\$'000	H1 FY25	H1 FY24
Statutory and Underlying EBITDA	7,260	7,048
Statutory and Underlying Operating Cash Flow	6,261	7,612
Statutory and Underlying EBITDA Cash Conversion (%)	86.2%	108.0%
Statutory & Underlying cash from operating activities	6,261	7,612
Statutory & Underlying cash (used) in investing activities	(7,782)	(10,327)
Statutory & Underlying cash from financing activities	1,019	10,343
Underlying net change in cash and cash equivalents	(502)	7,628



H1 FY25 RESULTS

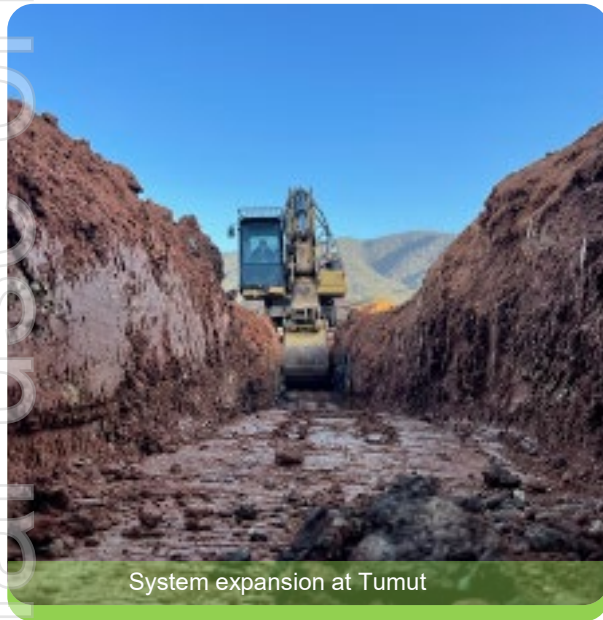
Operational & Key Project Update

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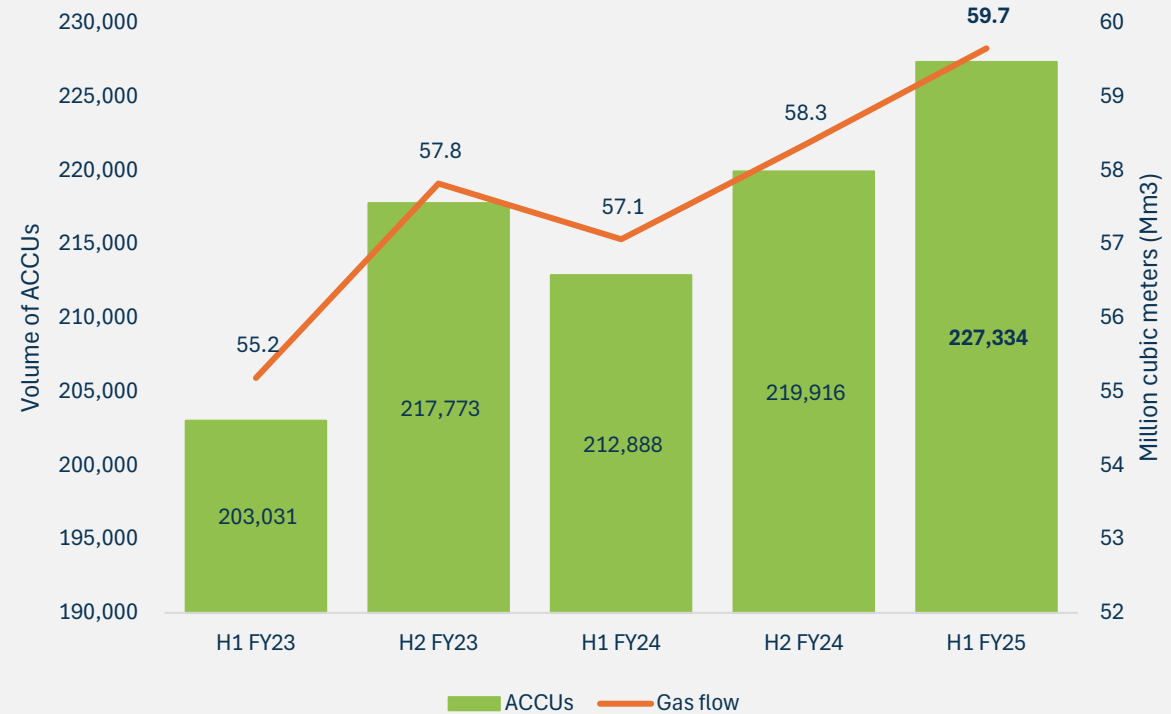
Growing Biogas Flows

LGI continues to "chase the gas", ensuring maximum practical gas flow is achieved at each site



The period H1FY25, LGI reached our high-water mark for gas flow collection.

BIOGAS FLOWS AND ACCU VOLUME



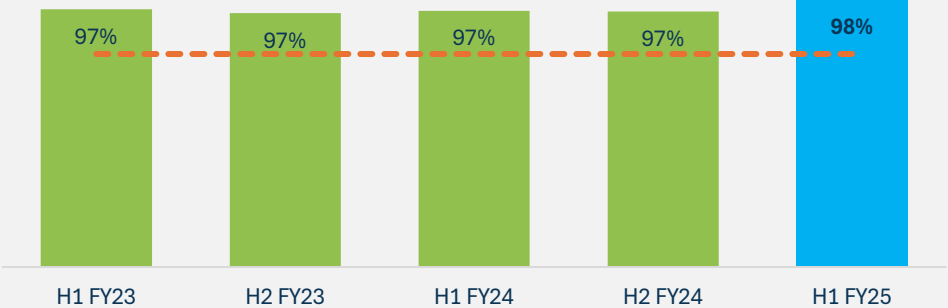
Energy Generation

Growth in generation reflects high levels of availability and increased capacity

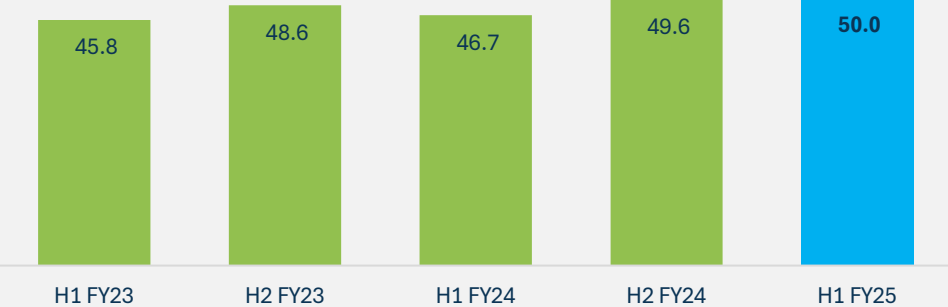
LGI continues to focus on availability, along with its proprietary operating system, DACS, is a strategic focus as LGI expands its battery capacity.



AVAILABILITY (% OF PERIOD)



RENEWABLE ELECTRICITY GENERATION (GWhs)



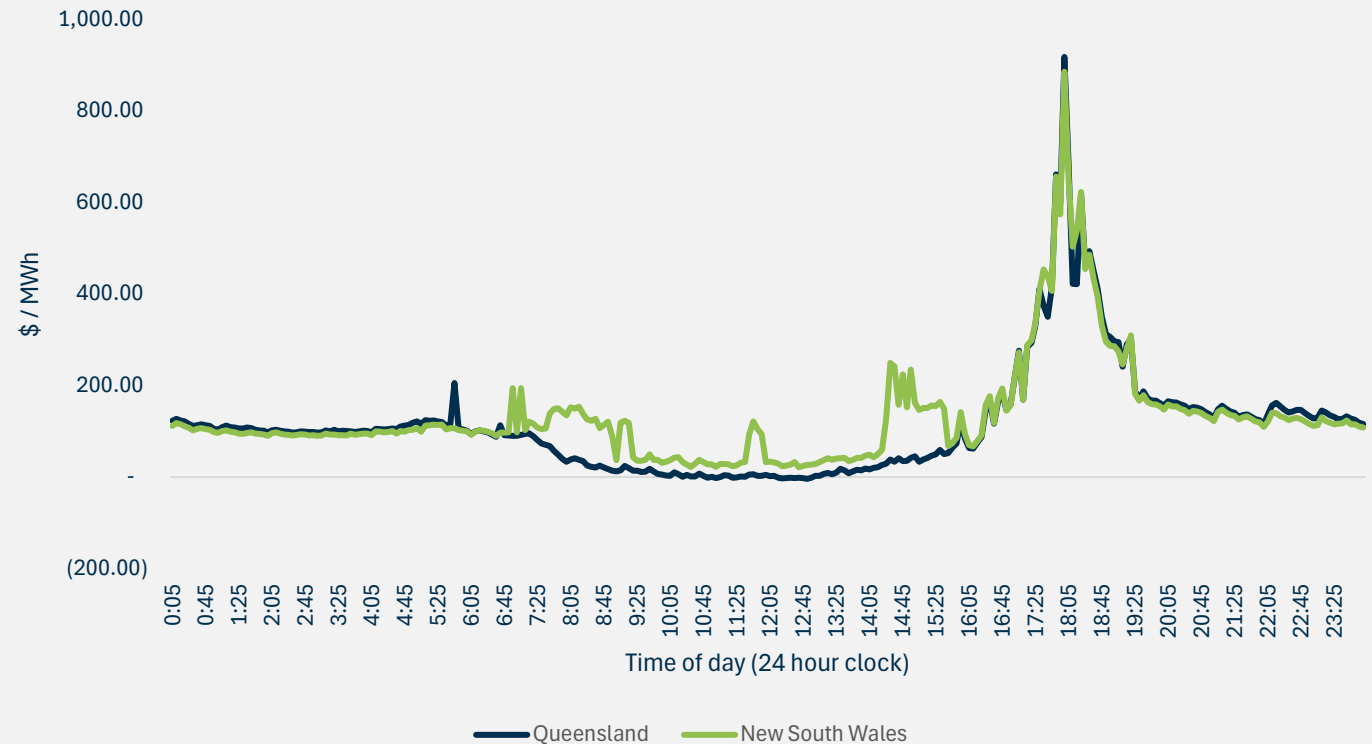
Leveraging Energy Volatility with Batteries

LGI is well-positioned to continue to benefit from underlying electricity price volatility, via its network energy generation and battery roll-out

The Electricity wholesale market continues to show volatility as it is going through the energy transition.

Including FCAS revenue, LGI's Bunya power station achieved **72.6%** above the average AEMO price for its first full 12 months of operation.

**AVERAGE AEMO ELECTRICITY PRICING,
TIME OF DAY (JUL-24 TO DEC-24)**



Funded Development Pipeline - Project Update

Expanding biogas and contracted sites provides the foundation to concurrently pursue future growth initiatives

Mugga Lane

6 engines commissioned and exporting to the grid

- Full 20MW grid interconnection commissioned (November 2024)
- New engines commissioned and existing engines received minor overhaul & control upgrades
- Batteries ordered (for delivery H1 FY26)
- Gas field has had 37 new wells connected to the gas collection system

Sydney Eastern Creek

Earth works completed, Civils to be completed March 2025

- Expected annual EBITDA \$3.0 - \$3.5 million (based on current electricity pricing)
- Forecast capex ~ \$16.5 - \$18.5 million (this forecast includes pre-paid royalty of \$6 million)
- Earth works completed
- Civils due for completion in March
- Major plant forecast delivery February and March, landing on site March
- Gas field has had 32 new wells connected to the gas collection system

Other Projects

Tumut & Esk operational in H1 FY25

- Tumut operational (July 2024)
- Esk operational (December 2024)
- Re-negotiation of Grafton contract to long-term gas rights contract model
- Grafton received CER approval
- Gas field assessment work commenced Taree and Tuncurry

INDUSTRY AWARDS AND RECOGNITION

LGI projects have been recognised by our peers as innovative and sustainable

LGI's focus on ensuring highest quality power station construction combined with Australia first technology innovation, is now achieving recognition from industry groups

WRIQ

Waste Recycling Industry Association (QLD)

- LGI received an award for Environmental Innovation of the Year
- Award received for the Bunya Renewable Hybrid Project

Leading Edge Utility Scale Battery Bunya Landfill Power Project



IPWEA

Institute of Public Works Engineering Australia

- LGI won 3 awards at the 2024 IPWEA awards
- Toowoomba project won for Innovation & Sustainability in Water – providing renewable energy to the Wetalla sewage treatment plant
- Environment & Sustainability for Bunya Power Plant with Battery
- Public Works Project of the Year for the Toowoomba project



SIM-PAC

Sustainable Industrial Manufacturing (Asia Pacific)

- LGI received an award for 'Outstanding Efforts in Advancement of the Bioeconomy Sector'



H1 FY25 RESULTS

Outlook & Summary

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FY25 Outlook

LGI continues to focus on driving growth and continued operational excellence

FY25 PRIORITIES



Continued focus on **Health, Safety, Environment and Quality**



Deliver key near term projects, expansion of Canberra and BINGO



Explore the expansion of power stations on contracted sites



Work on contracted landfill sites to **expand the gas collection facilities**



Actively pursue **new opportunities** for landfill gas management

GUIDANCE RECONFIRMED:

FY25 Underlying EBITDA is expected to grow by 12% to 15%, subject to market dynamics and timing issues outside the Company's control

H1 FY25 RESULTS

Appendix



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Board



VIK BANSAL

**Non-Executive
Chair**

Vik, appointed chair in April 2021, is CEO and Managing Director of Boral, Australia's largest vertically integrated construction materials company, with 5,000 plus employees and 300 sites.



ADAM BLOOMER

**Managing Director
and Founder**

Adam established LGI in 2009 to provide high quality biogas solutions for landfill sites across regional Australia, and he has since been the Company's Managing Director.



ABIGAIL CHEADLE

**Non-Executive Director
and Audit & Risk
Committee Chair**

Abigail was appointed (Non-Executive Director) NED and (Audit & Risk Committee) ARC Chair of LGI Ltd in April 2021.



ANDREW PETERS

Non-Executive Director

Andrew was appointed Non-Executive Director of LGI in January 2018 and is on the Audit and Risk Committee.



DR. JESSICA NORTH

**Executive Director
and Chief
Sustainability Officer**

Over 20 years' of experience in the waste industry, in particular carbon abatement and biogas management from landfills.



TIMOTHY MCGAVIN

**Non-Executive Director
and Chair of
Remuneration &
Nominations Committee**

Tim invested into LGI Ltd in 2011 as the cornerstone investor. He was appointed Chair of the Board from January 2018 – March 2021.

LGI Value Proposition



LGI strives to deliver value with its vertically integrated business model in a number of key areas at the intersection of the waste, electricity and carbon sectors



END-TO-END SOLUTION

Highly credentialed and experienced team with combined expertise in landfill, electricity and carbon



DIVERSIFIED REVENUE STREAMS

Generated by site infrastructure & management, greenhouse gas abatement and renewable energy



VERTICALLY INTEGRATED

Operating platform expanding 32 sites, with long term contracts



INNOVATION AND TECHNICAL INGENUITY

Incorporating synergistic technologies to optimise biogas extraction + yield (DACs, etc)



SCALABLE MODEL

Well-funded development pipeline to result in considerable electricity capacity uplift



SIGNIFICANT GROWTH PROSPECTS

Early in its market penetration, with domestic expansion



DECARBONISATION EXPOSURE

Favourable industry dynamics, providing greenhouse gas abatement



RENEWABLE ENERGY

Assisting expedite energy transition through the generation of dispatchable distributed renewable energy



LGI LIMITED

AUSTRALIA
ABN. 49 138 085 551
57 Harvey Street North
Eagle Farm 4009 QLD
07 3711 2225
enquiries@lgi.com.au
www.lgi.com.au

**clean energy &
carbon abatement**



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