

# **Global Renewable Natural Gas Market Size Study and Forecast by Feedstock Source (Agricultural Waste, Municipal Solid Waste (MSW), Wastewater Treatment Sludge, Food Waste, Others), By Product Form (Compressed Renewable Natural Gas (C-RNG), Liquefied Renewable Natural Gas (L-RNG), Pipeline-Quality Renewable Natural Gas), By End-Use Industry, and Regional Forecasts 2026–2036**

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## **Abstracts**

The Global Renewable Natural Gas (RNG) Market, valued at USD 15.14 Billion in 2025, is projected to reach USD 54.76 Billion by 2036, expanding at a CAGR of 12.2% during the forecast period. The market consists of biomethane produced from upgrading biogas from organic waste streams to provide a low-carbon and renewable alternative to conventional natural gas. Renewable natural gas (RNG) can be a transportation fuel, power generation, industrial energy, or a chemical feedstock, and injected into existing natural gas pipeline networks to enable decarbonisation and circular economy initiatives around the world. The market is segmented into Agricultural Waste, Municipal Solid Waste (MSW), Wastewater Treatment Sludge, Food Waste, and Others on the basis of feedstock. On the basis of product, the market is segmented into Compressed Renewable Natural Gas (C-RNG), Liquefied Renewable Natural Gas (L-RNG), and Pipeline-Quality Renewable Natural Gas. On the basis of end-use, the market is segmented into Transportation Fuel, Power Generation, Residential Use, Commercial Use, Industrial Use, Chemical Feedstock, and Others.

The market is expected to witness a healthy growth rate owing to increasing global decarbonization initiatives, favorable renewable energy policies, growing investment in

waste-to-energy infrastructure, and rising demand for sustainable transportation fuels. Many industries are embracing renewable natural gas and governments around the world are adopting renewable fuel standards, carbon reduction programs, and financial incentives to encourage the production and use of renewable natural gas. Advancements in technology for anaerobic digestion, biogas upgrading, carbon capture, gas purification, feedstock optimization and digital plant monitoring are improving production efficiency, methane recovery and overall project economics. Increasing investments in landfill gas recovery, agricultural waste management, wastewater treatment facilities and organic waste valorization are further accelerating market demand. Additionally, strategic collaborations among energy companies, waste management companies, agricultural producers, utilities, and technology providers are expected to aid the long-term growth of the global renewable natural gas market during the forecast period.

### Global Renewable Natural Gas Market: Key Highlights

The Global Renewable Natural Gas (RNG) Market was valued at USD 15.14 Billion in 2025 and is expected to reach USD 41.50 Billion by 2030, growing at a CAGR of 22.4% during the forecast period (2024-2030).

The market is projected to grow at a CAGR of 12.2% between 2026 and 2036 and reach USD 54.76 Billion by 2036. The growth is driven by the rising adoption of renewable transportation fuels, expanding landfill gas recovery, growing anaerobic digestion capacity, and favorable carbon credit and renewable fuel incentive programs.

North America is the most dominant region in the global market, with an estimated share of 42.7% in 2025. The region has robust Renewable Fuel Standard (RFS) programs, Low Carbon Fuel Standard (LCFS) incentives, large-scale landfill gas recovery infrastructure, and increasing investment in RNG production from agricultural and municipal waste.

Europe is anticipated to witness the fastest growth at a CAGR of 13.1% during the forecast period of 2026-2036, owing to ambitious decarbonization targets, growing biomethane production, supportive renewable energy policies, and increasing investments in agricultural biogas and circular waste management projects.

Agricultural Waste is projected to be the largest feedstock source in 2025,

accounting for about 36.8% of the market. Leadership in the segment is due to the availability of abundant feedstock, increasing use of livestock waste and increasing investments in farm-based anaerobic digestion facilities.

Food Waste is projected to grow at the highest CAGR of 13.8% during the forecast period, due to increasing food waste recycling initiatives, stringent landfill diversion regulations, and increasing deployment of organic waste-to-biomethane projects.

The product form segment is led by pipeline-quality renewable natural gas, which is expected to account for 45.3% of the market in 2025. This is due to the increasing biomethane grid injection, its compatibility with the current natural gas infrastructure, and the growing distribution networks for utility-scale renewable gas.

Liquefied Renewable Natural Gas (L-RNG) is projected to register the fastest CAGR of 13.5% over the forecast period, 2026–2036, owing to increasing demand for low-carbon heavy-duty transportation fuels, marine applications and long-haul freight decarbonization.

Transportation Fuel is the largest end-use industry segment and is estimated to account for an estimated 39.6% share in 2025, due to increased use of renewable natural gas in commercial fleets, heavy-duty trucks, buses, and municipal transport.

Growing investments in anaerobic digestion, landfill gas recovery, biomethane upgrading, carbon capture technologies, waste valorization, renewable fuel infrastructure and circular bioeconomy projects are expected to provide significant long-term opportunities for energy companies, utilities, waste management companies, agricultural producers and renewable fuel

## Research Scope & Methodology

This report is a complete strategic business report on the Global Renewable Natural Gas (RNG) Market. It has been analyzed on the basis of the strategic outlook for the period ranging from 2026 to 2036. The report assesses the market size, revenue forecasts, competitive landscape, technological developments, feedstock innovations and emerging investment opportunities shaping the global renewable gas industry. The

evaluation includes all aspects of the RNG value chain including feedstock collection, anaerobic digestion, biogas upgrading, purification, compression, liquefaction, pipeline injection, storage, distribution and end-use deployment in transportation, power generation, residential, commercial, and industrial applications. The study analyzes the market by Feedstock Source (Agricultural Waste, Municipal Solid Waste (MSW), Wastewater Treatment Sludge, Food Waste, Others), Product Form (Compressed Renewable Natural Gas (C-RNG), Liquefied Renewable Natural Gas (L-RNG), Pipeline-Quality Renewable Natural Gas), and End-Use Industry (Transportation Fuel, Power Generation, Residential Use, Commercial Use, Industrial Use, Chemical Feedstock and Others). Regional Analysis North America, Europe, Asia Pacific, and LAMEA. It assesses renewable energy policies, waste management infrastructure, biomethane production capacity, carbon reduction initiatives, natural gas infrastructure, and regulatory structures impacting the regional market growth. The report also discusses innovations in anaerobic digestion technologies, biogas upgrading systems, carbon capture integration, methane recovery, feedstock optimization, digital plant monitoring, and biomethane purification technologies that are changing the competitive landscape of the global renewable natural gas market.

The research methodology is based on extensive primary and secondary research to provide accurate market intelligence and robust long-term forecasting. The primary research consists of structured interviews with renewable natural gas producers, energy companies, utilities, waste management companies, agricultural organizations, technology providers, engineering companies, government agencies and industry experts in the major global markets. Secondary research includes the study of published information from various renewable energy associations, environmental organizations, government agencies, company annual reports, investor presentations, scientific journals, energy outlook reports and authenticated market intelligence sources. An extensive primary and secondary research has been conducted to understand the market size, share, trends and growth to validate the market size, share, trends and growth, and to develop market estimates. Forecasting models consider historical renewable gas production, trends in waste generation, renewable energy investments, policy incentives, technology adoption, regulatory developments, and macroeconomic indicators. Competitive benchmarking analyzes the production capacity, feedstock portfolios, geographic presence, investment in research and development, strategic collaborations and innovation pipelines of key market participants to offer a comprehensive view of the evolving competitive landscape of the Global Renewable Natural Gas Market.

## Key Market Segments

#### By Feedstock:

Agricultural Waste

Municipal Solid Waste (MSW)

Landfill Gas

Wastewater Treatment Plant Sludge

Food Waste

Others

#### By Production Technology:

Anaerobic Digestion

Gasification

Power-to-Gas

Others

#### By Distribution Method:

Pipeline Injection

Virtual Pipeline (Compressed/Liquefied RNG)

On-site Utilization

#### By Application:

Transportation Fuel

Power Generation

Residential & Commercial Heating

Industrial Fuel

Others

By End User:

Utilities

Transportation

Industrial

Residential & Commercial

Others

Key Market Players

BP plc

Shell plc

TotalEnergies SE

Enbridge Inc.

Nature Energy A/S

Archaea Energy Inc.

OPAL Fuels Inc.

Clean Energy Fuels Corp.

Vanguard Renewables

Montauk Renewables, Inc.

## Industry Trends

With governments and industries moving faster to decarbonize, renewable natural gas (RNG) is becoming a strategic imperative. Low-carbon fuel standards, renewable energy targets and circular economy initiatives are all encouraging the conversion of organic waste to clean energy.

Livestock farms are more and more adopting anaerobic digestion systems to turn manure and crop residues to biomethane, and at the same time, decrease methane emissions and improve waste management efficiency.

Municipalities continue to invest in waste to energy infrastructure, landfill methane capture and biogas upgrading facilities to support renewable gas production and reduce greenhouse gas emissions. Landfill gas recovery and municipal organic waste processing will continue to expand.

Biogas upgrading technologies are advancing rapidly with improvements in membrane separation, pressure swing adsorption (PSA), water scrubbing, chemical scrubbing and cryogenic upgrading systems, which lead to higher biomethane purity, better methane recovery and lower operation costs.

Increasingly, utilities are injecting biomethane into existing natural gas distribution networks to produce pipeline-quality renewable natural gas that can be used on a large scale without major modifications to the existing infrastructure.

Liquefied Renewable Natural Gas (L-RNG) is increasingly being used as a fuel for heavy-duty transportation, marine applications and long-haul freight because of its higher energy density, longer driving range and compatibility with existing LNG infrastructure, making it a preferred low-carbon fuel.

Technologies for carbon capture and utilization are being increasingly integrated

with RNG production facilities to further reduce life cycle emissions, improve project economics and support the production of carbon-negative renewable fuels.

RNG facilities are leveraging digital technologies such as AI-based plant optimisation, predictive maintenance, remote asset monitoring, smart sensors and automated process control to improve operational efficiency, methane recovery, feedstock management and overall plant performance.

Strategic alliances between energy companies, utilities, waste management companies, agricultural producers, municipalities, technology providers and infrastructure developers are accelerating the commercialization of renewable natural gas projects, increasing biomethane production capacity and strengthening renewable gas supply chains.

Investments in anaerobic digestion, landfill gas recovery, agricultural biogas projects, food waste valorization, biomethane upgrading, carbon capture integration, and renewable gas infrastructure will support long-term growth of the global renewable natural gas market through 2036.

## Market Determinants

**Supportive Government Policies and Decarbonization Initiatives:** Government incentives, renewable fuel standards, low-carbon fuel regulations, carbon pricing mechanisms, and renewable energy targets are major drivers of the renewable natural gas market. These policies encourage investments in anaerobic digestion, landfill gas recovery, biomethane upgrading, and renewable gas infrastructure to support greenhouse gas emission reduction and circular economy objectives.

**Growing Availability of Organic Waste Feedstocks:** Increasing generation of agricultural waste, municipal solid waste, wastewater sludge, and food waste is providing abundant feedstock for renewable natural gas production. Improved waste collection systems and waste management initiatives are strengthening feedstock availability while reducing landfill disposal and methane emissions.

**Advancements in Biogas Upgrading and Anaerobic Digestion Technologies:** Continuous innovation in anaerobic digestion systems, membrane separation,

pressure swing adsorption (PSA), water scrubbing, carbon capture, and digital plant optimization is improving methane recovery, biomethane purity, operational efficiency, and overall project economics, accelerating commercial deployment of RNG facilities.

**Increasing Demand for Low-Carbon Transportation Fuels:** Rising adoption of renewable natural gas in heavy-duty trucks, buses, municipal fleets, marine transport, and industrial vehicles is driving market growth. Renewable natural gas provides significant lifecycle greenhouse gas emission reductions while utilizing existing natural gas infrastructure and fueling networks.

**High Capital Investment and Feedstock Logistics Challenges:** Development of renewable natural gas facilities requires significant capital investment in anaerobic digesters, upgrading equipment, compression systems, storage infrastructure, and distribution networks. Additionally, feedstock collection, transportation, seasonal availability, and supply chain management can increase operational complexity and project costs.

**Regulatory Complexity and Infrastructure Constraints:** Renewable natural gas projects must comply with evolving environmental regulations, permitting requirements, gas quality specifications, and interconnection standards. Limited biomethane pipeline access, infrastructure constraints, and varying regional regulatory frameworks can delay project development and commercial expansion.

## Opportunity Mapping Based on Market Trends

**Expansion of Agricultural Waste-to-Energy and Circular Bioeconomy Projects:** Growing investments in farm-based anaerobic digestion, livestock waste management, and agricultural residue utilization are creating significant opportunities for renewable natural gas producers to expand biomethane production while supporting sustainable agriculture, methane emission reduction, and circular resource utilization.

**Growth of Renewable Transportation Fuel Infrastructure:** Increasing demand for low-carbon fuels across heavy-duty trucking, public transportation, marine shipping, and logistics is creating substantial opportunities for compressed renewable natural gas (C-RNG), liquefied renewable natural gas (L-RNG),

fueling stations, and renewable gas distribution networks that support transport sector decarbonization.

**Rising Integration with Carbon Capture and Renewable Energy Systems:**  
Expanding adoption of carbon capture, utilization, and storage (CCUS), renewable electricity, green hydrogen, and smart energy management systems is creating opportunities to enhance the environmental performance and commercial value of renewable natural gas facilities while enabling carbon-negative fuel production and integrated low-carbon energy solutions.

**Expansion of Biomethane Injection and Emerging Renewable Gas Markets:**  
Increasing investments in pipeline-quality biomethane, renewable gas infrastructure, landfill gas recovery, food waste valorization, and wastewater biogas projects across North America, Europe, Asia Pacific, and LAMEA are creating substantial long-term opportunities. Companies investing in advanced biogas upgrading technologies, digital plant optimization, strategic utility partnerships, feedstock diversification, and large-scale renewable gas infrastructure will be well positioned to capitalize on the accelerating global demand for renewable natural gas through 2036.

## Value-Creating Segments and Growth Pockets

### Agricultural Waste Dominates the Market While Food Waste Registers the Fastest Growth

The Agricultural Waste segment accounted for the largest market share of an estimated 36.8% in 2025, driven by abundant feedstock availability, extensive utilization of livestock manure, expansion of farm-based anaerobic digestion facilities, and supportive government incentives promoting agricultural waste-to-energy projects. Agricultural residues, crop waste, and animal manure provide a reliable and sustainable source of organic material for biomethane production while helping reduce greenhouse gas emissions and improve waste management. Growing investments in rural renewable energy infrastructure, circular agriculture, and sustainable farming practices continue to reinforce the segment's leadership. Increasing adoption of anaerobic digestion technologies further supports long-term market expansion.

The Food Waste segment is projected to register the highest CAGR of 13.8% during 2026–2036, supported by stringent landfill diversion regulations, expanding organic

waste recycling programs, increasing municipal food waste collection initiatives, and growing investments in biomethane production from commercial, industrial, and household organic waste streams.

### Pipeline-Quality Renewable Natural Gas Leads the Market While Liquefied Renewable Natural Gas Records the Fastest Growth

The Pipeline-Quality Renewable Natural Gas segment accounted for the largest market share of approximately 45.3% in 2025, driven by increasing biomethane grid injection, extensive existing natural gas infrastructure, expanding utility distribution networks, and rising industrial demand for renewable gas. Pipeline-quality RNG enables seamless integration with conventional natural gas systems, allowing utilities and industrial users to decarbonize operations without major infrastructure modifications. Growing investments in gas upgrading technologies and renewable gas distribution networks continue to strengthen the segment's leadership.

The Liquefied Renewable Natural Gas (L-RNG) segment is projected to register the highest CAGR of 13.5% during 2026–2036, supported by increasing adoption across heavy-duty transportation, marine fuel applications, long-haul freight, mining operations, and industries requiring high-energy-density renewable fuels with extended transportation range.

### Transportation Fuel Generates the Highest Demand While Industrial Applications Witness the Fastest Expansion

The Transportation Fuel segment represented the largest market share of approximately 39.6% in 2025, driven by growing adoption of renewable natural gas across commercial vehicle fleets, heavy-duty trucks, transit buses, refuse collection vehicles, and municipal transportation systems seeking to reduce lifecycle greenhouse gas emissions. Supportive environmental regulations, renewable fuel standards, and government incentives continue encouraging fleet operators to transition from conventional fossil fuels to renewable gas. Expansion of renewable fueling infrastructure further reinforces the segment's market leadership.

The Industrial Use segment is projected to register the highest CAGR of 13.2% during 2026–2036, supported by increasing industrial decarbonization initiatives, growing replacement of conventional natural gas with renewable alternatives, expanding corporate sustainability commitments, and rising investments in low-carbon manufacturing processes across energy-intensive industries.

## Regional Market Assessment

### North America

North America is projected to dominate the global renewable natural gas (RNG) market, accounting for an estimated 42.7% market share in 2025. The region's leadership is driven by well-established Renewable Fuel Standard (RFS) and Low Carbon Fuel Standard (LCFS) programs, extensive landfill gas recovery infrastructure, abundant agricultural feedstocks, and growing investments in biomethane production. The United States and Canada continue expanding renewable natural gas facilities through supportive government policies, corporate sustainability commitments, and advanced waste-to-energy technologies. Increasing adoption of RNG across transportation, industrial, and utility sectors, combined with expanding pipeline injection infrastructure and renewable fuel incentives, continues to strengthen regional market growth. Ongoing investments in anaerobic digestion, landfill gas upgrading, and agricultural waste conversion projects are expected to reinforce North America's leading position throughout the forecast period.

### Europe

Europe is projected to register the highest CAGR of 13.1% during 2026–2036, supported by ambitious climate neutrality targets, increasing biomethane production, favorable renewable energy policies, and growing investments in agricultural biogas, food waste valorization, and circular economy initiatives. Countries including Germany, France, Denmark, Italy, and the Netherlands continue expanding renewable gas infrastructure, biomethane upgrading facilities, and grid injection capacity to reduce dependence on fossil fuels and strengthen energy security. Stringent environmental regulations, carbon reduction commitments, and strong financial incentives are accelerating the deployment of renewable natural gas projects across residential, industrial, and transportation sectors. Continued investments in advanced anaerobic digestion technologies and sustainable waste management systems are expected to create substantial long-term growth opportunities across Europe.

### Asia Pacific

Asia Pacific represents a significant market for renewable natural gas, driven by rapid urbanization, increasing organic waste generation, expanding agricultural production, and growing government investments in clean energy and waste management

infrastructure. Countries including China, India, Japan, South Korea, and Australia are accelerating the development of anaerobic digestion facilities, biomethane plants, and renewable gas projects to improve energy security, reduce greenhouse gas emissions, and support sustainable waste management. Rising demand for low-carbon energy sources, expanding municipal waste collection programs, and increasing agricultural residue utilization continue to support market growth. Government initiatives promoting renewable energy adoption and circular economy practices are expected to further accelerate investment in renewable natural gas infrastructure across the region.

## LAMEA

The LAMEA region is emerging as a promising market for renewable natural gas, supported by abundant agricultural resources, increasing utilization of landfill gas, expanding waste-to-energy initiatives, and growing investments in renewable energy infrastructure. Countries across Latin America, the Middle East, and Africa are increasingly adopting renewable natural gas technologies to improve sustainable waste management, diversify energy sources, reduce greenhouse gas emissions, and support industrial decarbonization. Governments are encouraging investment in anaerobic digestion facilities, landfill gas recovery systems, and biomethane production through renewable energy policies and sustainability initiatives. Growing awareness of circular economy practices, combined with rising investments in agricultural waste utilization and clean energy infrastructure, is expected to generate significant long-term growth opportunities across the LAMEA region.

## Recent Developments

May 2025: Clean Energy Fuels Corp. expanded its renewable natural gas production and fueling infrastructure across North America to meet increasing demand for low-carbon transportation fuels and commercial fleet decarbonization.

April 2025: BP plc strengthened its renewable gas portfolio through new investments in biogas upgrading and renewable natural gas production facilities, supporting global energy transition and carbon reduction initiatives.

October 2024: Enbridge Inc. announced the expansion of renewable natural gas infrastructure projects focused on biomethane injection, pipeline integration, and agricultural waste utilization across North America.

August 2024: Nature Energy expanded its biomethane production capacity through new anaerobic digestion facilities utilizing agricultural residues and organic waste to increase renewable natural gas supply for European markets.

## Critical Business Questions Addressed

How will the Global Renewable Natural Gas Market evolve through 2036?

The report evaluates long-term market growth driven by expanding biomethane production, waste-to-energy projects, transportation fuel demand, agricultural waste utilization, and supportive decarbonization policies.

Which feedstock source, product form, and end-use industry segments will generate the greatest commercial opportunities?

The study identifies the dominant and fastest-growing market segments, enabling renewable gas producers, utilities, waste management companies, agricultural organizations, technology providers, and investors to prioritize strategic investments.

What are the primary factors driving market expansion?

The report analyzes the influence of renewable fuel standards, carbon reduction initiatives, anaerobic digestion technologies, landfill gas recovery, biomethane upgrading, and transportation fuel demand on future market development.

Which regional markets present the strongest long-term investment potential?

The assessment compares renewable energy policies, waste management infrastructure, feedstock availability, biomethane production capacity, and regulatory support across major regions to identify the most attractive growth opportunities.

How can renewable natural gas companies strengthen their competitive position in the evolving industry?

The report examines strategic priorities including feedstock diversification, advanced biogas upgrading, carbon capture integration, pipeline injection capabilities, digital plant optimization, and strategic utility partnerships to support long-term competitive advantage.

## Beyond the Forecast

The renewable natural gas market will continue to evolve through advancements in anaerobic digestion, biomethane upgrading, membrane separation, carbon capture integration, digital plant automation, methane recovery optimization, and renewable gas purification technologies, enabling greater production efficiency and lower lifecycle emissions.

Rising investments in agricultural biogas, landfill gas recovery, food waste valorization, wastewater treatment, renewable transportation fuels, biomethane pipeline infrastructure, and circular bioeconomy initiatives will continue creating substantial opportunities for energy companies, utilities, waste management firms, agricultural producers, and renewable fuel developers worldwide.

As governments and industries increasingly prioritize decarbonization, circular resource utilization, renewable energy security, methane emission reduction, and sustainable waste management, companies investing in advanced RNG production technologies, integrated waste-to-energy systems, carbon-negative fuel solutions, and large-scale renewable gas infrastructure will be well positioned to capitalize on long-term growth opportunities in the global renewable natural gas market through 2036.

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