

Global Renewable Natural Gas and Bio-LNG Fuel Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

<https://marketpublishers.com/r/G1202AC2708CEN.html>

Date: August 2026

Pages: 191

Price: US\$ 3,480.00 (Single User License)

ID: G1202AC2708CEN

Abstracts

According to our (Global Info Research) latest study, the global Renewable Natural Gas and Bio-LNG Fuel market size was valued at US\$ 10642 million in 2025 and is forecast to a readjusted size of US\$ 27319 million by 2032 with a CAGR of 13.4% during review period.

In 2025, global sales of Renewable Natural Gas and Bio-LNG Fuel reached approximately 152,000 GWh, with a blended average selling price of around US\$68.0 per MWh. Renewable Natural Gas and Bio-LNG Fuel refers to renewable methane fuels produced from biogas derived from livestock manure, landfill gas, food waste, sewage sludge, agricultural residues and other organic waste streams through recovery, purification, upgrading, compression or liquefaction processes. The product scope mainly covers pipeline quality renewable methane fuel, compressed renewable methane fuel and liquefied renewable methane fuel, with the ability to be injected into natural gas grids, used in natural gas vehicles or supplied as liquefied low-carbon fuel for road transport, marine fuel, industrial fuel, gas grid supply and off-grid energy applications.

Renewable Natural Gas and Bio-LNG Fuel represent one of the more commercially actionable pathways in the decarbonization of the natural gas system. Compared with hydrogen and green ammonia, which still require significant infrastructure build-out and end-use adaptation, renewable methane fuels can leverage existing gas grids, LNG refueling infrastructure, CNG vehicles and industrial gas equipment. This gives the market strong compatibility with existing energy infrastructure. The global market size is estimated at approximately USD 10.34 billion in 2025 and is expected to reach USD 12.50 billion in 2026, with a compound annual growth rate of around 13.7% from 2026

to 2032. Pipeline quality renewable methane fuel remains the largest product category, compressed renewable methane fuel mainly serves road transport, while liquefied renewable methane fuel benefits from the growth of LNG trucks, marine fuel and off-grid industrial applications.

From the supply side, industry competitiveness is not determined by production capacity alone. Key capabilities include feedstock access, project operation, gas upgrading efficiency, low-carbon certification and downstream sales channels. Feedstocks such as landfill gas, livestock manure, food waste, sewage sludge and agricultural residues are highly regional and fragmented. As a result, producers are less likely to build dominance through large centralized plants alone, and more likely to compete through project networks, control of organic waste resources, gas grid access and transport fuel customer relationships. Companies with integrated capabilities across waste resource management, biomethane production, gas grid injection and transport fuel sales are better positioned to capture stable revenue and policy support.

In terms of competitive landscape, companies in Europe and North America have taken the lead in the commercialization of RNG, biomethane and Bio-LNG. bp, Shell, TotalEnergies, ENGIE, Air Liquide, Gasum, St1 Biokraft, Snam, VNG, Clean Energy Fuels, OPAL Fuels and WM have already built visible project portfolios and sales networks. India is growing rapidly under policy support for compressed biogas, with Reliance Industries, EverEnviro and Adani Total Gas accelerating project development. China remains in the demonstration and regional commercialization stage, with representative project operators including Henan Yutian Xinnengyuan Youxian Gongsi, Huaxin Ranqi Jituan Youxian Gongsi, CGN Environmental Protection Industry Co., Ltd. and Power Construction Corporation of China, Ltd. However, the Chinese market still faces challenges such as small project scale, fragmented operators, immature pricing mechanisms and limited monetization of green attributes. Over the medium to long term, driven by transport decarbonization, industrial gas substitution, organic waste valorization and carbon reduction policies, renewable natural gas and Bio-LNG fuel are expected to become one of the most practical fuel pathways in the low-carbon transition of the natural gas system.

This report is a detailed and comprehensive analysis for global Renewable Natural Gas and Bio-LNG Fuel market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market

share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Renewable Natural Gas and Bio-LNG Fuel market size and forecasts, in consumption value (\$ Million), sales quantity (GWh), and average selling prices (US\$/MWh), 2021-2032

Global Renewable Natural Gas and Bio-LNG Fuel market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (GWh), and average selling prices (US\$/MWh), 2021-2032

Global Renewable Natural Gas and Bio-LNG Fuel market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (GWh), and average selling prices (US\$/MWh), 2021-2032

Global Renewable Natural Gas and Bio-LNG Fuel market shares of main players, shipments in revenue (\$ Million), sales quantity (GWh), and ASP (US\$/MWh), 2021-2026

The Primary Objectives in This Report Are:

- To determine the size of the total market opportunity of global and key countries

- To assess the growth potential for Renewable Natural Gas and Bio-LNG Fuel

- To forecast future growth in each product and end-use market

- To assess competitive factors affecting the marketplace

This report profiles key players in the global Renewable Natural Gas and Bio-LNG Fuel market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include bp p.l.c., Shell plc, TotalEnergies SE, ENGIE SA, Air Liquide S.A., Gasum Oy, St1 Biokraft AB, EnviTec Biogas AG, Verbio SE, Waga Energy SA, etc.

This report also provides key insights about market drivers, restraints, opportunities,

new product launches or approvals.

Market Segmentation

Renewable Natural Gas and Bio-LNG Fuel market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Pipeline Quality Renewable Methane Fuel

Compressed Renewable Methane Fuel

Liquefied Renewable Methane Fuel

Other

Market segment by Feedstock Source

Landfill Gas Upgrading

Anaerobic Digestion Gas Upgrading

Other

Market segment by Application

Road Transport Fuel

Marine Fuel

Industrial Fuel

Gas Grid Supply

Off Grid Energy Fuel

Other

Major players covered

bp p.l.c.

Shell plc

TotalEnergies SE

ENGIE SA

Air Liquide S.A.

Gasum Oy

St1 Biokraft AB

EnviTec Biogas AG

Verbio SE

Waga Energy SA

Snam S.p.A.

VNG AG

Future Biogas Ltd.

Nordsol B.V.

Waste Management, Inc.

Clean Energy Fuels Corp.

OPAL Fuels Inc.

Montauk Renewables, Inc.

Ameresco, Inc.

Generate Upcycle

Vanguard Renewables

Brightmark RNG Holdings LLC

Kinder Morgan, Inc.

Calgren Renewable Fuels, LLC

Reliance Industries Limited

EverEnviro Resource Management Pvt. Ltd.

Adani Total Gas Limited

Gruner Renewable Energy

Henan Yutian Xinnengyuan Youxian Gongsi

Huaxin Ranqi Jituan Youxian Gongsi

CGN Environmental Protection Industry Co., Ltd.

Power Construction Corporation of China, Ltd.

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Renewable Natural Gas and Bio-LNG Fuel product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Renewable Natural Gas and Bio-LNG Fuel, with price, sales quantity, revenue, and global market share of Renewable Natural Gas and Bio-LNG Fuel from 2021 to 2026.

Chapter 3, the Renewable Natural Gas and Bio-LNG Fuel competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Renewable Natural Gas and Bio-LNG Fuel breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Renewable Natural Gas and Bio-LNG Fuel market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Renewable Natural Gas and Bio-LNG Fuel.

Chapter 14 and 15, to describe Renewable Natural Gas and Bio-LNG Fuel sales channel, distributors, customers, research findings and conclusion.

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