

Global Renewable Natural Gas and Bio-LNG Fuel Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Renewable Natural Gas and Bio-LNG Fuel market size is expected to reach \$ 27319 million by 2032, rising at a market growth of 13.4% CAGR during the forecast period (2026-2032).

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 studies the global Renewable Natural Gas and Bio-LNG Fuel production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Renewable Natural Gas and Bio-LNG Fuel and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Renewable Natural Gas and Bio-LNG Fuel that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Renewable Natural Gas and Bio-LNG Fuel total production and demand, 2021-2032, (GWh)

Global Renewable Natural Gas and Bio-LNG Fuel total production value, 2021-2032, (USD Million)

Global Renewable Natural Gas and Bio-LNG Fuel production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (GWh), (based on production site)

Global Renewable Natural Gas and Bio-LNG Fuel consumption by region & country, CAGR, 2021-2032 & (GWh)

U.S. VS China: Renewable Natural Gas and Bio-LNG Fuel domestic production, consumption, key domestic manufacturers and share

Global Renewable Natural Gas and Bio-LNG Fuel production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (GWh)

Global Renewable Natural Gas and Bio-LNG Fuel production by Type, production, value, CAGR, 2021-2032, (USD Million) & (GWh)

Global Renewable Natural Gas and Bio-LNG Fuel production by Application, production, value, CAGR, 2021-2032, (USD Million) & (GWh)

This report profiles key players in the global Renewable Natural Gas and Bio-LNG Fuel market based on the following parameters - company overview, production, value, 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Renewable Natural Gas and Bio-LNG Fuel market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (GWh) and average price (US\$/MWh) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by

year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Renewable Natural Gas and Bio-LNG Fuel Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Renewable Natural Gas and Bio-LNG Fuel Market, Segmentation by Type:

Pipeline Quality Renewable Methane Fuel

Compressed Renewable Methane Fuel

Liquefied Renewable Methane Fuel

Other

Global Renewable Natural Gas and Bio-LNG Fuel Market, Segmentation by Feedstock Source:

Landfill Gas Upgrading

Anaerobic Digestion Gas Upgrading

Other

Global Renewable Natural Gas and Bio-LNG Fuel Market, Segmentation by Application:

Road Transport Fuel

Marine Fuel

Industrial Fuel

Gas Grid Supply

Off Grid Energy Fuel

Other

Companies Profiled:

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.

Key Questions Answered:

1. How big is the global Renewable Natural Gas and Bio-LNG Fuel market?
2. What is the demand of the global Renewable Natural Gas and Bio-LNG Fuel market?
3. What is the year over year growth of the global Renewable Natural Gas and Bio-LNG Fuel market?
4. What is the production and production value of the global Renewable Natural Gas and Bio-LNG Fuel market?
5. Who are the key producers in the global Renewable Natural Gas and Bio-LNG Fuel market?
6. What are the growth factors driving the market demand?

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