

Global Renewable Natural Gas and Bio-LNG Fuel Market Growth 2026-2032

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Abstracts

The global Renewable Natural Gas and Bio-LNG Fuel market size is predicted to grow from US\$ 10118 million in 2025 to US\$ 27140 million in 2032; it is expected to grow at a CAGR of 14.2% from 2026 to 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.

LP Information, Inc. (LPI) ' newest research report, the "Renewable Natural Gas and Bio-LNG Fuel Industry Forecast" looks at past sales and reviews total world Renewable Natural Gas and Bio-LNG Fuel sales in 2025, providing a comprehensive analysis by region and market sector of projected Renewable Natural Gas and Bio-LNG Fuel sales for 2026 through 2032. With Renewable Natural Gas and Bio-LNG Fuel sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Renewable Natural Gas and Bio-LNG Fuel industry.

This Insight Report provides a comprehensive analysis of the global Renewable Natural Gas and Bio-LNG Fuel landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Renewable Natural Gas and Bio-LNG Fuel portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Renewable Natural Gas and Bio-LNG Fuel market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Renewable Natural Gas and Bio-LNG Fuel and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Renewable Natural Gas and Bio-LNG Fuel.

This report presents a comprehensive overview, market shares, and growth opportunities of Renewable Natural Gas and Bio-LNG Fuel market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Pipeline Quality Renewable Methane Fuel

Compressed Renewable Methane Fuel

Liquefied Renewable Methane Fuel

Other

Segmentation by Feedstock Source:

Landfill Gas Upgrading

Anaerobic Digestion Gas Upgrading

Other

Segmentation by Application:

Road Transport Fuel

Marine Fuel

Industrial Fuel

Gas Grid Supply

Off Grid Energy Fuel

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

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 Addressed in this Report

What is the 10-year outlook for the global Renewable Natural Gas and Bio-LNG Fuel market?

What factors are driving Renewable Natural Gas and Bio-LNG Fuel market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Renewable Natural Gas and Bio-LNG Fuel market opportunities vary by end market size?

How does Renewable Natural Gas and Bio-LNG Fuel break out by Type, by Application?

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