



**BIOGAS
WORLD**



Biogas Community

Preview RNG Report

Market Intelligence

January 2026

Canada

biogasworld.com

biogascommunity.com

Confidentiality and Disclaimer Notice

This document and its associated attachments contain information that is confidential and proprietary to BiogasWorld Media Inc. (hereinafter referred to as BiogasWorld). Any disclosure, copying, distribution or use of this report and its accompanying attachments with any party can be done only with written consent of BiogasWorld.

The content of this report is based on information gathered in good faith from both primary and secondary sources and is believed to be correct. BiogasWorld has taken all reasonable care to ensure that the information presented in this report is fair and accurate. Considering that this report is based on the information provided by different industry stakeholders, BiogasWorld cannot guarantee its accuracy. Any decisions made based upon any information contained in this document are the sole responsibility of the reader.

Table of Contents

02	Confidentiality and Disclaimer Notice	11	Upgrading Snapshot
03	Table of Contents	14	Market Drivers
04	Notice to Readers	31	Gas Utilities in Canada
05	Market Overview	36	Selected References
08	Clean Fuel Regulations Overview		

Notice to Readers

Energy Conversion

The report uses a number of energy units to present the information due to the fact that different sources of information may use various units of energy. When reading the report, you will find helpful the following table containing approximate energy conversions for RNG as reference.

Table 1. Energy Conversion

Unit of Energy	Conversion
1 PJ	1 000 000 GJ
	0,9478 TBTU
	947 817 MMBTU
	277 780 TWh
	26 518 000 m3 RNG (biomethane)
	0,9478 Bcf

Abbreviations

- PJ** Petajoule
- GJ** Gigajoule
- TBTU** Trillion British Thermal Units
- MMBTU** Metric Million British Thermal Unit
- TWh** Terra Watt hours
- Bcf** Billion cubic feet



Canada

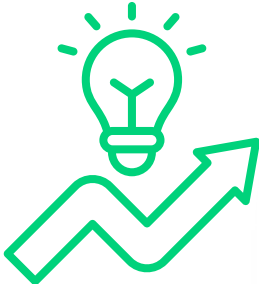
Market Overview

Current Market Overview

There are currently [redacted] operating facilities upgrading biogas to RNG. Ontario now surpasses Quebec with [redacted] operational facilities to Quebec's [redacted]. British Columbia trails with [redacted] plants, followed by Alberta with [redacted] and New Brunswick with [redacted].

CHP facilities across Canada continue to reach the end of their contracts, creating an opportunity for them to transition to RNG systems if it is economically feasible to do so and government support exists to facilitate the transition. This transition is expected to occur over the next several years, with a focus on power generation over

Market Development Overview

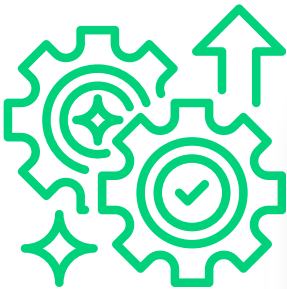


Potential

The CBA estimates that Canada is meeting just 10% (approx. 100 PJ) of its biogas & RNG potential.

There are around 100 plants in development or under construction, and a few dozen more at an earlier stage of concept development. Canadian Agrifood Alliance, CANZA, estimates over 50% of market potential is currently being developed.

New Developments



The Canadian biogas and RNG market continue to grow at a steady, albeit slow, pace. Although boasting a sizable potential, with an important number of facilities in development, these sites are faced with continual delays and a slow regulatory environment.

The market is expected to continue to grow at a steady pace over the next few years.

The market is expected to continue to grow at a steady pace over the next few years. Alberta is expected to see significant growth in the market over the next few years.

Clean Fuel Credit Overview

Between 2024 and 2025, RNG accounted for ██████ % of total credit generation under the CFR. That's ██████ credits, accounting for ██████ % growth year-over-year. RNG used to generate CFR credits possessed an average CI score of ██████ g/MJ. The lowest reported CI score was ██████ g/MJ (ClearBlue Markets, 2025).


In 2024, the volume of fuels procured under the Clean Fuel Regulation increased by ██████ %. This increase is believed to be in large part due to an increase in RNG procurement by NG utilities.

Table 2: CFR Credit Pricing & RNG Fuel Contributions, 2024 and 2025, by Quarter

Quarter	Average CFR Credit Price (CAD)	Volume of RNG Produced (m3)	Number of Credits Created for RNG (t CO ₂ e)	Weighted Average CI of RNG by volume (gCO ₂ e/MJ)
Q1 2024	150.28	13,018,705	15,020	64.5
Q2 2024				
Q3 2024				
Q4 2024				
Q1 2025				
Q2 2025				
Q3 2025				
Q4 2025				


Upgrading Snapshot

Figure 5. Biogas Upgrading in Canada, installed units



█████ █████ remains the most used upgrading technology across Canada. █████ continues to grow as the technology of choice for many new facilities. █████ was once the technology of choice for many facilities, but has experienced decreasing favourability in recent years. █████ is a strong emerging technology, particularly at landfill sites.

Figure 6. Active RNG Facilities in Canada, by Primary Feedstock



█████ and █████ sites are tied for the highest number of active RNG sites. █████ remain a close second, and municipalities opt for █████ technology in the management of their organic waste.

A photograph of several tall, stainless steel industrial distillation columns in a refinery or chemical plant. The columns are connected by a network of pipes and ladders. The scene is set against a sunset sky with soft orange and blue tones. The text 'Canada' is overlaid in white, centered horizontally.

Canada

Market Drivers

A decorative graphic in the bottom right corner consisting of several overlapping, wavy green lines that resemble stylized waves or a modern logo element.

BUDGET 2025: AN INCREASE IN MAJOR ENERGY & INFRASTRUCTURE

A spring election carried with it a late budget, released in November 2025. The Budget outlines major infrastructure and energy projects campaigned on during the election: trans-Canada connectivity and the goal of turning Canada into an energy powerhouse.

Projects outlined will bring an increase in the means to transport and distribute RNG; however, the Budget is a

Federal - Market Drivers

Regulations

- The Clean Fuel Standard (CFS) came into force in 2023
 - Details can be found on pages 8-10 of this report
 - Fuel suppliers are required to meet the standard
- In 2021, the Government of Canada announced the Greenhouse Gas (GHG) Emissions Reduction Plan, which sets a goal of reducing GHG emissions between 40 and 45% by 2030
 - Canada's [2030 Emissions Reduction Plan](#) set a goal of reducing GHG emissions between 40 and 45% by 2030

Alberta - Market Drivers

Regulations

- [Bill 44](#): passed in May of 2025, Bill 44 is an amendment to the Alberta Agricultural Operation Practices Act (AOPA), allowing

Funding & Other Financial Incentives

- Emissions Reductions Alberta (ERA) governs the Technology Innovation and Emissions Reductions Regulation (TIER) fund which

Manitoba - Market Drivers

Regulations

- Requires landfills over a certain size to collect LFG and dispose of it, but does not dictate end-use.

Funding

- Disposal of LFG at landfills is being encouraged by the province through a variety of funding programs.

Regulation in Development

- [Manitoba's Energy Roadmap](#), (2023), identified RNG as a potential source of low-carbon energy in the province.
 - [Manitoba's Energy Roadmap](#), (2023), release

Incentives

Ontario - Market Drivers

It's estimated that the province of Ontario has an RNG potential of approximately [REDACTED] PJ, against a demand that is estimated to reach [REDACTED] PJ by 2030. The CGA estimates that the supply of RNG in Canada will increase from [REDACTED] PJ available in 2023, to [REDACTED] PJ by the end of 2026.

Ontario boasts [REDACTED] % of Canada's dairy operations, or [REDACTED] farms. The province also features approximately [REDACTED] of other livestock farming operations, including hog and pig farming, poultry and egg production, sheep and goat farming, and other animal production.

Regulations

- The Clean Energy Credit (CEC) registry was launched in 2023.
 - The program is operated by the
- In early 2025, the Technical Standards & Safety Authority (TSSA) released the Biogas Facility Audit Program. The program aims to support i

Québec - Market Drivers

It is estimated that the province of Québec has an RNG potential of approximately [REDACTED] PJ. However, some estimates have placed this potential as high as [REDACTED] PJ. Québec has experienced major investments in its RNG sector in recent years. According to AQPER, over CAD [REDACTED] has been invested in the Québec RNG market since 2017, and these investments are projected to increase to CAD [REDACTED] by 2030. These investments are estimated to increase RNG supply in the province to

Regulations

- CAN/BNQ 3672-100 (2023) Biomethane – Quality Specifications for Injection into Natural Gas Distribution and Transmission Systems, an international standard that will help to increase the demand for RNG by providing a clear framework for its use in natural gas systems.
- More flexibility in applying the RNG supply tariff to encourage voluntary consumption
- Development of new activities for the production of RNG, such as the production of RNG from agricultural waste and the production of RNG from industrial waste.



Gas Utilities in Canada