



RNG / Biomethane Market Intelligence Report

Market Intelligence

January 2026

Competitive Landscape

biogasworld.com

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Contributors

BiogasWorld would like to extend a thank you to all the companies that contributed to the accuracy of the report by sharing their project information.



Note: the information on projects by companies not mentioned on this page has been collected using publicly available sources.

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A Word from the BiogasWorld Team

Dear BiogasWorld members,

To describe the RNG market in 2025 with one word, the most suitable word would be 'adaptation'. Many of our colleagues in North America would likely agree that 2025 was not the year we hoped for. The accelerated growth experienced over the past half-decade came to an abrupt halt as project economics shifted dramatically. Much of the growth over 2025 can be attributed to the work of previous years coming to fruition. Although the industry is attempting to adapt to new market conditions, in its current status, growth is likely to be a fraction of previous years. Across the Atlantic, the European market is adapting to its own set of market conditions, including high ambitions from the European Union and national governments. To meet these goals, some companies are pursuing economies of scale in underdeveloped European markets, such as those in Eastern Europe and the Iberian Peninsula; others are contending with the challenging economics of small-scale systems and low levels of social acceptability.

The present document is our ninth edition of the RNG Market Intelligence Report—Competitive Landscape, which has become a key reference and an influential part of our members' decision-making for their marketing and business development activities. We believe that the information included in this report plays an important role in our members' success in the RNG market, and we strive to increase its value to our clients.

What does this edition include?



New Biomethane Projects

Nearly [REDACTED] projects in total



Updated Analysis

Updated information from over [REDACTED] major industry players



Updated Information on Capacity

Updated maps featuring the market presence of suppliers



New Upgrading Suppliers

Information on new technology suppliers entering the market

In summary, this document and all BiogasWorld actions aim to help the industry connect and grow worldwide. Join us and take advantage of this professional network or use our continually expanding services to reach your own business goals.

Sincerely,
Your BiogasWorld Team

Biogas Upgrading - Technology Suppliers

As the industry develops, the number of suppliers for biogas upgrading equipment continues to grow. The table below presents the major players (in alphabetical order).

Table 1. Active Biogas Upgrading Suppliers

Water Scrubbing	PSA	Membrane Separation	Chemical Scrubbing	Cryo
<ul style="list-style-type: none"> • Dürr CTS • • 	<ul style="list-style-type: none"> • Air Liquide 	<ul style="list-style-type: none"> • AB Energy 	<ul style="list-style-type: none"> • Ammongas 	<ul style="list-style-type: none"> • CryoPur • • • •

Upgrading Market

It is important to note that due to limits in data acquisition, incomplete public information and some private data, the study may analyze fewer projects than are actually in operation in Europe and the North America. BiogasWorld conservatively estimates that only [REDACTED] % of existing plants are analyzed in this section. To have a full picture of the European market, BiogasWorld suggests additional market study.

The current competitive analysis is based on information on nearly [REDACTED] upgrading units:

Figure 1. Biogas Upgrading Technology Suppliers, by number of operational units



Figure 2. Biogas Upgrading Technology Suppliers, by total installed capacity (Nm³/h)



Figure 3. Biogas Upgrading Technology Suppliers, by units in development



Water Scrubbing

Major Suppliers - Water Scrubbing

COMPANY	Number of units in operation	Capacity, plants in operation, m3/hr	Number of Units Installed during last 3 years (2023-2025)	Installed capacity during last 3 years (2023-2025), m3/hr	Number of units under construction (2026-2027)	Capacity, under construction, m3/hr
GREENLANE*	95	112,275	N/A	19,900	12	31,850

*B...

Membrane Separation

Major Suppliers - Membrane Separation

COMPANY	Number of units in operation	Capacity, plants in operation, m3/hr	Number of units installed in last 3 years (2023-2025)	Installed capacity during last 3 years (2023-2025), m3/hr	Number of units under construction (2026-2027)	Capacity, under construction, m3/hr
AB ENERGY	95	44,833	82	39,388	242	99,957
AGRIKOMP*						N/A

*BiogasWorld has only partial capacity data

†This supplier sells multiple types of upgrading equipment, BiogasWorld is only able to confirm the types of a limited number

Chemical Scrubbing

Major Suppliers - Chemical Scrubbing

COMPANY	Number of units in operation	Capacity, plants in operation, m3/hr	Number of units installed in last 3 years (2023-2025)	Installed capacity during last 3 years (2023-2025), m3/hr	Number of units under construction (2026-2027)	Capacity, under construction, m3/hr
AMMONGAS	39	49,484	3	3,810	3	2,520
AROL ENERGY*†						
BRIGHT RENOVABLES						
K...						
V...						
W...						

*Data from 1H2023

Cryo

Major Suppliers - Cryo

COMPANY	Number of units in operation	Capacity, plants in operation, m3/hr	Number of units installed in last 3 years (2023-2025)	Installed capacity during last 3 years (2023-2025), m3/hr	Number of units under construction (2026-2027)	Capacity, under construction, m3/hr
CRYO PUR*	10	4,494	N/A	N/A	N/A	N/A
FIRMGREEN*						

Conclusion

Although the upgrading market in North America faced numerous hurdles in 2025, growth continues as projects that have been in the development pipeline over the past few years move towards final commissioning. Market development continues in Europe, with underdeveloped markets experiencing new investments, and developed markets experiencing a reexamination of project feasibility. Development in other parts of the globe is steadily moving forward. Major players continue to pursue the potential of agricultural powerhouses, such as [REDACTED], and markets in [REDACTED] are transitioning from local waste utilization to large-scale processing, via anaerobic digestion.

The main conclusions are as follows:

1. Even with many territories experiencing some delays or market adjustments, the industry continues to grow and shows a steady interest in the solutions.
2. The most popular technology for new facilities in 2025 was [REDACTED], with several new companies entering this market every year.
3. BiogasWorld projects steady growth for 2026 - its intensity will be contingent on legislation, social acceptability, and other market developments.

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