

**BIOGAS
WORLD**



Biogas Community

Preview RNG Report

Market Intelligence

March 2026

USA

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A Word from the BiogasWorld Team

Dear BiogasWorld members,

As we enter 2026, the US biogas and renewable natural gas (RNG) market finds itself at a critical inflection point. After years of policy-driven growth, the market is facing shifting federal priorities, credit price volatility, and

What is new in this edition?



New RNG Projects

Analysis of [REDACTED] RNG facilities across the USA



Updated Analysis

Updated information on legislative activity at the federal and state levels



Updates on Utility Programs

Gas utility initiatives to support the development of the RNG sector

In summary, this document and all BiogasWorld actions aim to help the industry connect and grow worldwide. We now have over 170 clients and partners in 30 countries. Join us and take advantage of this professional network or use our continually expanding services to reach your own business goals.

Thank you for your support of our work and we hope we can continue to be your source for industry insight and market intelligence.

Sincerely,
Your BiogasWorld Team

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

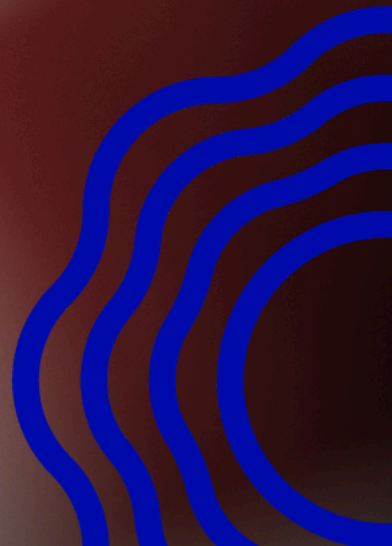
Unit of Energy	Conversion
1 PJ	1 000 000 GJ
	0,9478 TBTU
	947 817 MMBTU
	277 780 TWh
	26 518 000 m3 Biomethane (RNG)
	0,9478 Bcf

Abbreviations

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

The background of the slide is a close-up, slightly blurred image of the United States flag, showing the stars and stripes. The colors are muted, with a dark blue field for the stars and a deep red for the stripes. The text is centered over the white stripes.

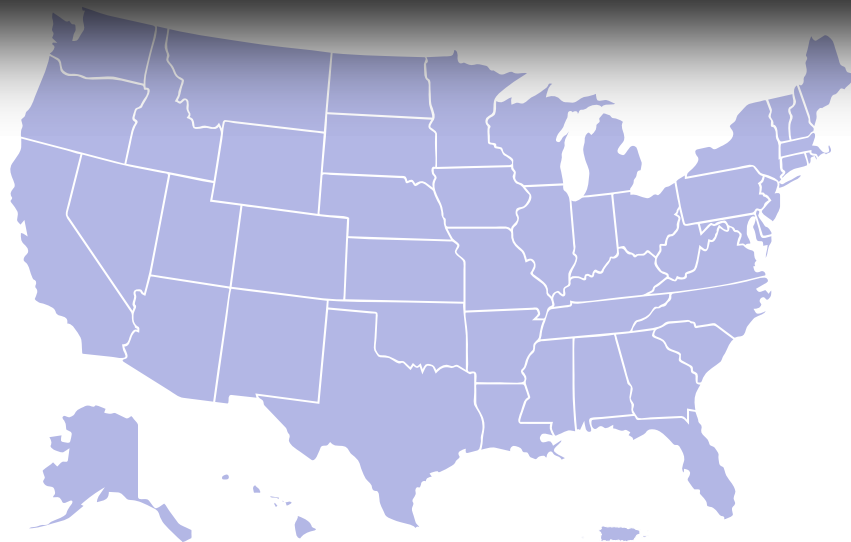
Market Overview



Current Market Overview

There are ██████ operating RNG facilities[1] in the US with most facilities injecting the upgraded RNG into the gas grid with the purpose of being used as vehicle fuel. The overall increase of operating facilities between 2024 and 2025 is XXXXX%.

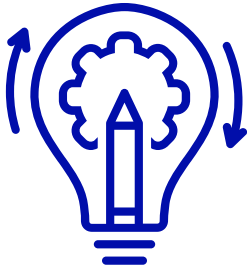
████████ again overtook ████████████████ as the most prominent RNG facility in the US. As the industry readjusts itself in this transition period, ██████████ are likely to remain the dominant site due to their low upfront CAPEX and the size of US landfills providing strong project economics.



1. BiogasWorld's data is regularly collected from public sources. Private and non-public data is not represented in this number. BiogasWorld also counts cluster projects as a single project, as upgrading is conducted centrally.

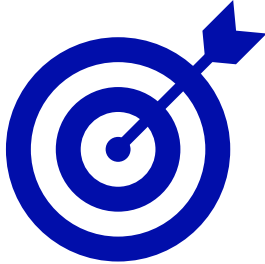
Current Market Overview

Projects in Development



According to BiogasWorld’s database, there are approximately XXXXX [REDACTED] facilities under construction and another XXXXX [REDACTED] stages of development, scheduled to be online within the next XXXXX years. [REDACTED] new facilities plan to inject RNG into the grid to use as vehicle [REDACTED]

Market Opportunities



The American Biogas Council (ABC) estimates the United States has the potential to support up to 17,000 new biogas facilities.

The US market underwent a reorientation during 2025, with many of the incentive programs the industry has enjoyed in recent years re [REDACTED]

Current Market Overview

INVESTMENTS



According to the ABC, the US biogas and RNG industry experienced around \$ [REDACTED] in investments over 2025. The sub-sectors that have received the most investments include [REDACTED] (\$ [REDACTED] in 2025) and agriculture (\$ [REDACTED] in 2025).

The graph on the left presents the operational RNG facilities in the US by the main feedstock processed at the site.

Important to note: BiogasWorld has information on [REDACTED] operational digesters operating as part of a cluster. Since these cluster projects utilize only one central upgrading unit, these projects are counted only once. The location of these clusters is presented in Figure 2.

Upgrading Snapshot

Out of [REDACTED] operating RNG projects, BiogasWorld possesses the information on upgrading technology utilized for [REDACTED] units. The results are presented in the Figures below. Figure 2 presents the available information based on the number of installations, whereas Figure 3 presents the data based on the installed capacity.

Figure 3. Operational RNG upgrading plants in the US, number of plants

A low-angle, upward-looking photograph of a complex industrial facility. The scene is dominated by large, cylindrical metal tanks and a network of thick, polished pipes. The pipes curve and connect the tanks, creating a sense of scale and complexity. The sky is a clear, bright blue with scattered white clouds, providing a high-contrast background for the metallic structures. The overall color palette is cool, with various shades of blue and grey.

Market Drivers



Federal and Multi-State - Market Drivers

Regulations

- [Renewable Fuel Standard \(RFS\)](#) requires a minimum volume of renewable fuel in transportation fuel. The [EPA SET Rule \(2025\)](#), targets
- The [Inflation Reduction Act \(IRA\)](#) (2022) major changes were made to the IRA early in 2025 which alter credit eligibility and availability. Changes include:
 -

Arkansas - Market Drivers

Regulations

- [SB 136 \(2021\)](#): allows gas utilities to purchase

Funding & Other Incentives

- The [2023-24 Energy & Environment](#)

California - Market Drivers

Regulations

- State renewable energy goal: 60% by 2030, ramping up to 100% by 2045
- The CPUC

- [Short-lived Climate Pollutants \(SLCP\) strategy](#): Aims to reduce GHG emissions across California from compounds such as black carbon (soot), methane (CH₄), and fluorinated

Wisconsin - Market Drivers

Regulations

- **Focus on Energy:** utilities program for renewable energy.

Funding & Other Incentives

- **LRB 3473:** (2021) establishes a USD 1 million grant program for the development of regional

Gas Utilities Programs & Incentives



Gas Utilities - Programs & Incentives

The gas utilities with RNG programs are presented in this section of the report.

ATMOS ENERGY

- State: [REDACTED]

- Developed a Clean Heat Plan, as required by [REDACTED]

Avista

- States: [REDACTED]

- Approved in September of 2022, Avista began offering [REDACTED]

BGE First Maryland

- State: Maryland

- Received approval for [REDACTED]

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