

**BIOGAS
WORLD**



Biogas Community

Preview Biomethane Report

Market Intelligence

June 2025

USA

biogasworld.com

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A Word from the BiogasWorld Team

Dear BiogasWorld members,

The US RNG market is slowly becoming an unstoppable force, once propelled by the drive and determination of the industry alone, its versatility continues to win the support of politicians and policymakers. Support has only grown as various levels of government recognize the industry's cross-sector potential. As the new US administration swings the pendulum back towards conventional fuels, the biogas and RNG industry is not fighting to maintain its place alone. There is a bipartisan push at the federal level to maintain support for biogas, and its role in reducing waste and diversifying energy.

RNG is becoming a more prominent part of the energy mix, and the industry has begun to see significant growth in the US market.

What is new in this edition?



New RNG Projects

Analysis of **██████** 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 **██████** clients and partners in **██████** 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

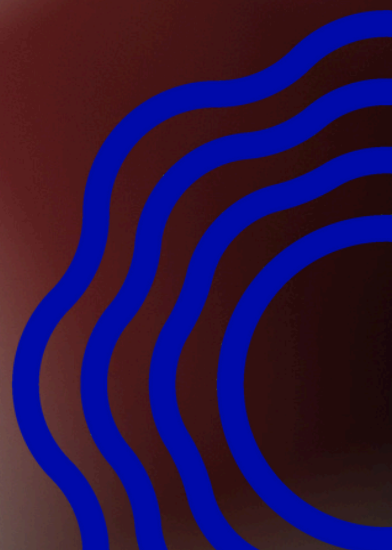
Unit of Energy	Conversion
1 PJ	1 000 000 GJ
	0,9478 TBTU
	947 817 MMBTU
	277 780 TWh
	26 518 000 m3 Biomethane (RNG)
	0,9478 Bcf

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 soft focus effect.

Market Overview

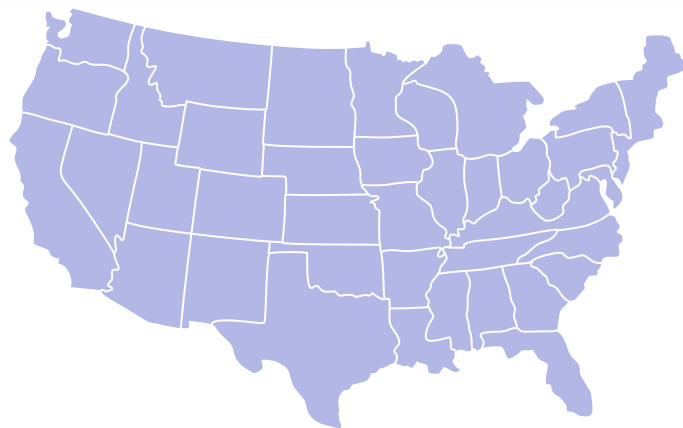


Current Market Overview

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 is █████% as compared with 2023 statistics.

The largest subsector of growth in 2024 was tied between the agricultural and landfill sectors, where the number of operational plants increased by █████% as compared to the end of 2023. Agricultural facilities (█████) has now overtaken landfill facilities (█████) as the largest subsector in the US. Agricultural sites have experienced the largest growth over the past few years, due in part to the rapid increase in digester cluster projects, which feed centralized upgrading systems in states such as

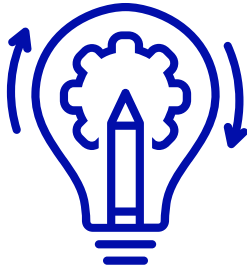
The █████ market is expected to grow █████% over the next five years, reaching █████ by 2029. This growth is driven by the increasing demand for RNG as a sustainable energy source, particularly in the transportation and industrial sectors. The market is also being supported by government incentives and regulations that encourage the production and use of RNG.



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

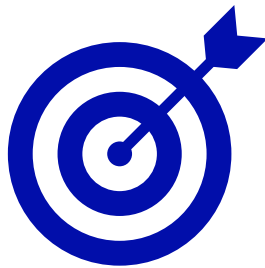
Projects in Development



According to BiogasWorld’s database, there is currently [REDACTED] RNG facilities under construction and another [REDACTED] at various stages of development, scheduled to be online within the next [REDACTED] years.

Many new facilities are planning to inject RNG into the grid to use as vehicle fuel.

Market Opportunities



In August of 2024, a report from [Wood-Mackenzie](#) found that despite doubling LFG-to-RNG capacity over the past [REDACTED] years, only [REDACTED] % of LFG potential has been tapped within the US.

An Economic Impact Analysis found that RNG contributed \$ [REDACTED] to US GDP in 2024.

Wood Mackenzie also found that [REDACTED] such as [REDACTED]

Current Market Overview

INVESTMENTS



The US biogas and RNG industry has experienced around \$ [REDACTED] in lifetime investment. The subsectors that have received the most investments include [REDACTED] (\$ [REDACTED]) and [REDACTED] (\$ [REDACTED]). According to the ABC, [REDACTED] experienced the

Figure 1. Active RNG Facilities, by type

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

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.

Note that the category “Other” includes the information combined for [REDACTED] plants: [REDACTED] using the mix [REDACTED] and [REDACTED], another one, [REDACTED] and [REDACTED]. For more details, please see view the update list of facilities in the Market Intelligence page of the Biogas Community.

Figure 2. 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 metal surfaces are highly reflective, showing highlights and shadows that emphasize their three-dimensional form. The background is a clear blue sky with scattered, light-colored clouds. The overall color palette is a range of blues, from deep cerulean to bright sky blue. In the bottom right corner, there is a decorative graphic element consisting of several overlapping, wavy blue lines that resemble a stylized wave or a modern logo element.

Market Drivers

Federal and Multi-State - Market Drivers

- **Renewable Fuel Standard (RFS)** requires a minimum volume of renewable fuel in transportation fuel. The **EPA SET Rule** (2023), targets **10 billion** in 2025.
 - EPA tracks compliance through the Renewable Identification Number (RIN) s
- The **Inflation Reduction Act (IRA)** (2022), includes many tax incentives for biogas and RNG production. The Act features a baseline credit, which gets expanded upon for meeting a number of additional requirements (all stacking upon one another) and includes:
 - **Production Tax Credit (PTC)**

Arkansas - Market Drivers

- **SB 136** (2021): allows gas utilities to purchase RNG alternatives including RNG and hydrogen if it is deemed to be in the public's interest.
- The 2023-24 **Energy & Environment Innovation Plan** highlights the role of anaerobic digestion and landfill gas for reducing waste-related methane emissions within the state.

California - Market Drivers

- State renewable energy goal: **100%** by 2045, ramping up to **50%** by 2030.
- The CPUC set RNG targets for California utilities: **100% RNG** by 2030. Gas Statewide Renewable Energy Standard (RES) is **33%** by 2030.
- **Short-lived Climate Pollutants (SLCP) strategy:** Aims to reduce GHG emissions across California from compounds such as black carbon, methane, and hydrofluorinated gases (HFCs, PFCs, and SF₆).
 - **2023-24 SLCP Strategy** highlights the role of anaerobic digestion and landfill gas for reducing waste-related methane emissions within the state.

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 the state of Colorado. The program targets an RNG procurement of USD [REDACTED] over [REDACTED] years.

Avista

- States: [REDACTED]
- September 2023
- Approved in September of 2022, Avista began offering [REDACTED]

Black Hills Energy

- State: [REDACTED]
- In January 2024, Black Hills submitted a [REDACTED]
- Integrated RNG into its Clean Heat Plans, which would cover [REDACTED] % of the utilities's 2 [REDACTED]

Cascade Natural Gas Corporation

- States: [REDACTED]
- Per Cascade's [2023 Integrated Resource Plan](#), the [REDACTED]
- Updated IRPs show Cascade is still pursuing RNG procurement, among other [REDACTED]

Questions? Contact us!

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