

December 2025

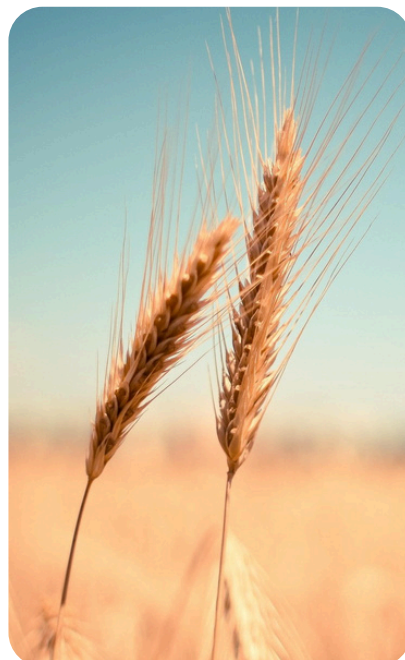
Biofuels

Each month we review the latest news and select key announcements and commentary from across the biofuels sector.



**Announcements
& Commentary**

**Research &
Development**



Providing clients with a strategic view of feedstock, technology, policy and marketing opportunity across the bioeconomy.

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Welcome readers, to this month's Biofuels News Review.

The UK's Trade Remedies Authority (TRA) has published its Statement of Essential Facts regarding a transition review of imports of biodiesel from Indonesia, a measure inherited from the EU. The TRA's key finding and intended recommendation is to maintain the existing countervailing duties on Indonesian biodiesel, which currently range from 8% to 18%. This duty is designed to counter government (i.e. Indonesian) subsidies that could cause material injury to the domestic UK industry. Additionally, the TRA has also proposed an update to the product description to specifically exclude Sustainable Aviation Fuel (SAF) from these duties, focusing the measure on traditional biodiesel for road transport.

In Germany, The Federal Office for Economic Affairs and Export Control (BAFA) has resumed publishing biofuel consumption data up to August 2025, now including Hydrotreated Vegetable Oil (HVO) volumes, which addresses the call for greater market transparency from the Union zur Förderung von Oel- und Proteinpflanzen (UFOP). The data for August 2025 showed a 3% increase in biodiesel consumption month-on-month (reaching 202,900 tonnes), while HVO volume decreased by 12% to 10,340 tonnes. The overall blending rate for all biofuels in the January to August period fell by 0.2% to 7.3% compared to the previous year. UFOP highlights that this transparency is crucial because while the physical blending limit for conventional biodiesel is capped at 7% by volume, HVO is a versatile "drop-in" fuel that can be blended up to 26% under the DIN EN 590 standard.

Major US fuel groups including ethanol producers, oil refiners, and fuel retailers, are urgently appealing for long-term policy certainty within the federal Renewable Fuel Standard (RFS) program, arguing that ongoing instability threatens the supply of affordable, reliable liquid fuels. The two primary sources of this market uncertainty are the unpredictable sales environment for E15 (gasoline with 15% ethanol), which is hindered by short-term waivers and seasonal/geographic restrictions, and the disruptive, inconsistent administration of Small Refinery Exemptions (SREs). The groups contend that the current, inconsistent SRE structure creates "winners and losers" and distorts the marketplace. They jointly urge Congress to provide a more predictable and durable policy foundation through legislation that would allow for the year-round, nationwide sale of E15 and enact a consistent, narrowly applied SRE structure.

Adding to this domestic regulatory friction, the Trump administration faced pressure from refiners regarding its proposed "America First" policy to cut the value of RINs (Renewable Identification Numbers) import credits for foreign biofuels by half. Refiners warned that limiting credits for imported supply could increase compliance costs and drive up prices, leading the administration to consider delaying the implementation of these credit cuts by one or two years (until 2027 or 2028) to avoid market disruption and manage political concerns over fuel affordability.

According to European Biodiesel Board, the European Union produced nearly 14 metric tons of biodiesel in 2024. Looking ahead to 2026, S&P Global identifies regulation and volatile feedstock dynamics as the primary forces shaping the market. Despite strong European biofuel mandates, the biodiesel sector is grappling with significant policy uncertainty and is facing challenging market conditions, including expectations of global oversupply and intense competition from cheap imports. Furthermore, producers are expected to face highly volatile prices for key feedstocks, such as soybean oil and used cooking oil, necessitating diversified procurement strategies to manage risk.

Read on for the latest news

Policy

TRA proposes duties on biodiesel from Indonesia be maintained



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The Trade Remedies Authority (TRA) has published its Statement of Essential Facts regarding imports of biodiesel from Indonesia.

This transition review was initiated on 6 December 2024. It examined the existing countervailing duties and considered the product scope. The TRA has recommended updating the product description to exclude sustainable aviation fuel, the proposed new definition is:

Fatty-acid mono-alkylesters or paraffinic gasoils obtained from synthesis or hydrotreatment of non-fossil origin in pure form or as included in a blend, excluding sustainable aviation fuel, in pure form or as included in a blend.

The intended recommendation is to maintain the existing countervailing duties rates which range from 8% to 18%.

[Click here for more information.](#)

German cabinet passes EU RED III

The German cabinet on 10 December approved legislation to implement the EU's Renewable Energy Directive (RED III) into national law.

This will adjust the greenhouse gas (GHG) reduction quota and abolish double counting of advanced fuels from 2026. But it is unlikely to pass remaining legislative processes in time for the EU's 1 January deadline.

The bill passed by the cabinet largely follows a draft dated 29 October that was leaked in November. The overall quota level will rise to 59pc by 2040. Aviation and marine fuels are exempt from the quota obligation.

The law will end the eligibility of palm oil products, most notably palm oil mill effluent (POME), for compliance towards the GHG quota. This exclusion, and a requirement for fuel producers to allow on-site audits, will not come into effect until 2027, leaving 2026 as a transitional year.

[Click here for more information.](#)

Trump administration may delay biofuel import credit cuts as refiners balk

In Washington, Reuters reports that Trump Administration may delay the winding down of RIN credits applied to imported biofuels and biofuel feedstocks until 2027 or 2028 following push back from refiners who have invested in foreign fuels.

The Trump Administration has been pushing an America First agenda that sought to cut in half the value of RIN production from foreign-produced fuels and feedstocks to boost investment in domestic production.

Decisions on year-round E15, 2026 blending volumes and small refinery exemptions have been slowed down due to the concerns by the oil industry.

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President Trump urged to support year-round sale of E15



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President Trump has been urged to support the year-round sale of E15. Read the relevant letter with the request of organizations representing ethanol producers, oil refiners, fuelmarketers, travel plazas, truck stops, and convenience store retailers in the link below.

[Click here for more information.](#)

Markets

EcoCeres earns prestigious RSB ICAO CORSIA certification, underscoring global leadership in sustainable aviation fuel

EcoCeres has attained certification under the RSB ICAO CORSIA scheme for Sustainable Aviation Fuel (SAF), a globally recognised standard aligned with the International Civil Aviation Organization's Carbon Offsetting and Reduction Scheme for International Aviation (CORSIA).

EcoCeres Inc., a leading pure-play renewable fuels producer, announced that it has attained certification under the RSB ICAO CORSIA scheme for Sustainable Aviation Fuel (SAF), a globally recognised standard aligned with the International Civil Aviation Organization's Carbon Offsetting and Reduction Scheme for International Aviation (CORSIA). The certification goes further than other CORSIA-eligible schemes to ensure robust social safeguards and biodiversity protection, while confirming that EcoCeres' SAF meets rigorous requirements for sustainability, greenhouse gas (GHG) reduction, and traceability.

[Click here for more information.](#)

Market value of biofuels production worldwide from 2021 to 2023, with a forecast until 2030

The global biofuels production market was valued at nearly 120 billion U.S. dollars in 2023. Figures are projected to continuously increase until 2030 when the biofuels market is forecast to amount to more than 175 billion U.S. dollars.

Biofuels are especially prevalent in the transportation sector and have been marketed as a renewable alternative to petroleum-based motor fuels such as gasoline and diesel.

Ethanol and biodiesel are the most common biofuel types, which are won from distilling and refining feedstocks such as crops, vegetable oils, and cooking fats. Although biofuel adoption has increased, they are usually blended with gasoline and diesel in order for them to work in regular combustion engines. The United States is the leading biofuel producing country in the world, followed by Brazil and Indonesia.

Both ethanol and biodiesel production is forecast to increase in the coming years. In 2024, a biofuel production forecast suggests worldwide output could edge close to 200 billion litres per annum.

[Click here for more information.](#)

COMMODITIES 2026: European biodiesel market to be shaped by regulatory landscape, feedstock dynamics

U.S. ethanol exports surged to 188.8 million gallons (mg) in August, vaulting 15% above July and running 24% ahead of year-ago levels, with momentum anchored by record-setting shipments to Canada and the European Union, which together absorbed nearly two-thirds of total volumes. Canada climbed 11% to 74.4 mg, remaining the top outlet and capturing 73% of all denatured fuel ethanol sold, while exports to the European Union skyrocketed 65% to 47.6 mg—almost entirely routed through the Netherlands, the principal destination for undenatured fuel ethanol. Beyond these markets, trade flows shifted sharply: Colombia climbed 43% to 14.1 mg to become the second-largest buyer of denatured product; India rebounded from 0.5 mg to 13.6 mg; the United Kingdom slid 50% to 10.6 mg; the Philippines eased 16% to 8.0 mg; Mexico jumped 35% to 6.7 mg; Jamaica leapt ninefold to 4.4 mg; South Korea held nearly steady at 3.8 mg; and Peru tumbled 56% to 3.7 mg. Brazil was notably absent from the market after taking 9.2 mg in July...

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BAFA enhances transparency in the blending market and now also reports HVO volumes



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After a long interruption, the Federal Office for Economic Affairs and Export Control (BAFA) has published the biofuels consumption figures up to August 2025. For the first time, the data also include HVO volumes. BAFA thus meets the call for greater transparency in the blending market that the Union zur Förderung von Oel- und Proteinpflanzen e. V. (UFOP) has repeatedly issued.

[Click here for more information.](#)

Research & Development

Moeve and UPM launch the first Green Molecules Innovation Chair



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During an event held at Moeve's headquarters, the company and the Universidad Politécnica de Madrid (UPM) signed an agreement to create the first Green Molecules Innovation Chair, a pioneering collaborative space created with the aim of exploring solutions that contribute to the energy transition by promoting science, innovation, and young talent.

The chair will work on developing projects to produce sustainable aviation fuels (SAF) through two complementary pathways: second-generation biofuels derived from organic waste and used cooking oils and synthetic fuels (e-fuels) generated using green hydrogen. It will cover areas of knowledge promoted by Moeve, such as CO₂ capture and transformation and green hydrogen production technologies, as well as other projects related to the field of chemicals and sustainable mobility.

[Click here for more information.](#)

Airbus Partners with Gati Shakti Vishwavidyalaya to develop Sustainable Aviation Fuel from waste

Airbus has entered into a new partnership with Gati Shakti Vishwavidyalaya (GSV) to advance research and development on converting municipal waste into Sustainable Aviation Fuel (SAF), aiming to support India's transition toward cleaner aviation.

The collaboration is structured under a Joint Study Agreement that combines GSV's research capabilities with Airbus' global industry experience. The goal is to develop scalable, domestically produced SAF using municipal solid waste as feedstock, aligning with India's broader circular economy objectives.

According to the companies, the effort supports the long-term sustainability of India's aviation sector, which is among the fastest-growing in the world. "This agreement is a key move toward establishing a homegrown SAF supply chain, which will be essential for supporting India's aviation growth while reducing emissions," said Jürgen Westermeier, President and Managing Director of Airbus India and South Asia.

Airbus will provide advanced research equipment, funding, and personnel. The company will also coordinate with the Earth Rakshak Foundation, a local nonprofit that will collect and supply waste materials from both rural and urban areas for the project.



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Bioethanol

Growth Energy CEO Emily Skor: Investing in Bioethanol is an Investment in the Rural Economy



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Growth Energy CEO Emily Skor today delivered keynote remarks at the 28th Annual World Ethanol & Biofuels Conference, underscoring the strength of America's rural economy and the growing global demand for homegrown bioethanol. Skor highlighted the Trump Administration's extension of the clean fuel production tax credit and the bipartisan coalition that continues to drive U.S. leadership in biofuels. She noted that support for American bioethanol is rooted in its benefits for farmers, small businesses, and rural communities nationwide.

[Click here for more information.](#)

facility while also converting 20 buses to 100% biodiesel (B100).

The project was awarded \$14.6 million through the Federal Transit Administration's Bus and Bus Facilities Competitive Program.

[Click here for more information.](#)

Quatra expands UK footprint with strategic acquisition of Lifecycle Oils

Quatra, one of Europe's leading specialists in the collection and processing of used cooking oils and fats, has signed an agreement to acquire UK-based Lifecycle Oils.

With this strategic step, Quatra strengthens its position in the UK market and accelerates its long-term growth ambitions across Europe.

The acquisition provides Quatra with an expanded customer network, stronger national coverage and access to experienced local teams. It reinforces Quatra's operational model in the UK, by improving customer proximity and enabling sustainable processing and collection on a larger, more efficient scale.

"The UK is an important market for us," said Piet Van Pollaert, CEO Quatra. "This acquisition enables us to bring our advanced capabilities to a broader customer base. It marks an important milestone in our European growth strategy."

[Click here for more information.](#)

Biodiesel

CyRide is converting its buses to biodiesel thanks to \$14M grant

Ames' bus system is using a \$14.6 million federal grant to expand its facility and convert its fleet to biodiesel. CyRide, the bus system collaboration between the city of Ames, Iowa State University, and ISU's student government, plans to expand its administrative, maintenance, and bus storage

Banks mining cuts 2084 tonnes of CO₂ using Dieselite biodiesel blend

Banks Mining, a long-established mining and quarrying company, has partnered with biodiesel supplier Argent Energy to lower carbon emissions from its mining operations.

[Click here for more information.](#)

Aviation & Maritime Biofuels

SAF production growth rate is slowing down, essential to correct course ahead of e-SAF mandates



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The International Air Transport Association (IATA) released new estimates for Sustainable Aviation Fuel (SAF) production showing that:

- In 2025, SAF output is expected to reach 1.9 million tonnes (Mt) (2.4 billion liters), double the 1 Mt produced in 2024. However, in 2026, SAF production growth is projected to slow down and reach 2.4 Mt.
- SAF production in 2025 represents only 0.6% of total jet fuel consumption, increasing to 0.8% the following year. At current price levels, the SAF premium translates into an additional USD 3.6 billion in fuel costs for the industry in 2025.
- The estimated SAF output for 2025 of 1.9 Mt is a downward revision from IATA's earlier forecasts due to lack of policy support to take full advantage of the installed SAF capacities. SAF prices exceed fossil-based jet fuel by a factor of two, and by up to a factor of five in mandated markets.

[Click here for more information.](#)

Willis Sustainable Fuels and Green Finance Institute launch accelerator to advance UK's sustainable aviation fuel infrastructure

Willis Sustainable Fuels UK Limited ("WSF"), a subsidiary of Willis Lease Finance Corporation (NASDAQ: WLFC) ("WLFC") and the Green Finance Institute ("GFI"), an independent advisor to governments and investors, have announced a Sustainable Aviation Fuel (SAF) Project Accelerator to bring WSF's pioneering SAF project at Wilton International in Teesside to Final Investment Decision (FID) and establish a replicable blueprint for financing new homegrown transition projects.

Since the start of 2025, the UK's SAF mandate requires increasing levels of SAF in the UK's jet fuel supply to reach 10% in 2030 and 22% in 2040.

Under the mandate, the economic, energy-security and innovation benefits of expanding domestic SAF production are compelling. This policy stability provides a strong, long-term demand signal to accelerate SAF growth, but the challenge remains in reaching bankability.

[Click here for more information](#)

Menzies Aviation advances transition to Hydrotreated Vegetable Oil (HVO) at London Heathrow and Gatwick Airports

Menzies Aviation, the leading service partner to the world's airports and airlines, has taken another step towards its net-zero by 2045 target, by advancing the transition from diesel to Hydrotreated Vegetable Oil (HVO) across its ground support equipment (GSE) fleet at London Heathrow (LHR) and London Gatwick (LGW) airports.

At Heathrow, around 60% of Menzies' GSE fleet now runs on HVO and more than 50% at Gatwick, with the remainder of all GSE equipment electric.

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Lighthouse Green Fuels launches consultation on £2bn Teesside sustainable aviation fuel facility



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Alfanar Group's Lighthouse Green Fuels (LGF) Sustainable Aviation Fuel (SAF) facility on Teesside has today progressed to the public consultation phase of the Development Consent Order (DCO) process.

The £2bn project is expected to be the first commercial scale SAF facility of its kind in the UK and create 600 jobs on Teesside. As a project of national significance, the consultation will inform the project's final planning application, which is targeted for submission in Summer 2026.

This follows recent [news](#) confirming LGF's move to a new, neighbouring site in Teesside offering more space for on-site SAF processing and potential further expansion

The Lighthouse Green Fuels (LGF) Sustainable Aviation Fuel (SAF) facility in Teesside has today launched its public consultation which will run until Tuesday January 13 2026.

[Click here for more information.](#)

Shell inks long-term deal for output from Egypt's first SAF plant



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Shell has signed a long-term agreement to purchase 100% of the sustainable aviation fuel (SAF) output from Green Sky Capital, providing the commercial certainty needed to construct Egypt's first commercial-scale SAF facility.

The plant, which is being developed by Green Sky Capital in the Suez Canal Economic Zone, is expected to commence operations by the end of 2027. It is designed to produce up to 145,000 tons per year (t/y) of SAF, along with bionaphtha and biopropane, helping to reduce carbon dioxide equivalent emissions by up to 500,000 t/y.

"By securing 100% of the plant's output, Shell is strengthening its global supply network for low-carbon fuels and helping aviation meet decarbonization targets," said Geoff Mansfield, Vice President of Low Carbon Fuels at Shell Trading.

[Click here for more information.](#)

Exploring ethanol: new fuel trial to start on Laura Mærsk

Maersk continues to explore options to diversify its low-emission fuel portfolio by testing ethanol in a dual-fuel methanol engine. Building on a successful initial trial, the company will now blend 50% ethanol with 50% methanol in a test onboard the vessel Laura Mærsk.

The first trial, conducted in October and November, involved a 10% ethanol / 90% e-methanol blend and confirmed that ethanol can be safely and effectively integrated into the fuel mix. The test underscores the potential to create greater optionality for Maersk's dual-fuel methanol fleet, essentially enabling dual fuel alcohol vessels.

[Click here for more information.](#)

World Fuel Services supplies a Norwegian Cruise Line Holdings vessel with waste-based biofuels in Greece through collaboration with EKO

World Fuel Services, a World Kinect (NYSE: WKC) company (World Fuel) announces that Norwegian Cruise Line Holdings has carried out one of the first commercial biofuel bunkerings for a cruise vessel in Greece, with Norwegian Viva receiving a waste-based marine fuel blend in Piraeus. Coordinated by World Fuel, in collaboration with Greek supplier EKO, the delivery highlights how international cooperation is enabling the cruise sector to reduce emissions today.

The pioneering bunkering operation represents an extension of Norwegian Cruise Line Holdings' biofuel program across Southern Europe as part of its Sail & Sustain strategy and highlights World Fuel's ability to connect ship operators with certified sustainable fuels worldwide.

The delivery builds on Norwegian Cruise Line Holdings' previous biofuel operations in Europe, including successful trials in Gibraltar, Copenhagen, and the Amsterdam-Rotterdam-Antwerp (ARA) region, as well as a biofuel delivery in Piraeus on 20th July. Together, these operations highlight the cruise line's commitment to integrating sustainable fuel solutions across its fleet and World Fuel's pivotal role in enabling these projects.

[Click here for more information.](#)

Events

28th - 30th April 2026

**Argus Green Marine Fuels
Europe Conference**

Antwerp, Belgium

CONFERENCE

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5th - 7th May 2026

**Global Maritime
Decarbonisation 2026**

Amsterdam, Netherlands

CONFERENCE

[Click here for more information](#)

22nd - 23th September 2026

SAF Global Summit 2026

London, UK

CONFERENCE

[Click here for more information](#)

20th - 22nd October 2026

Argus Biofuels Europe

London, UK

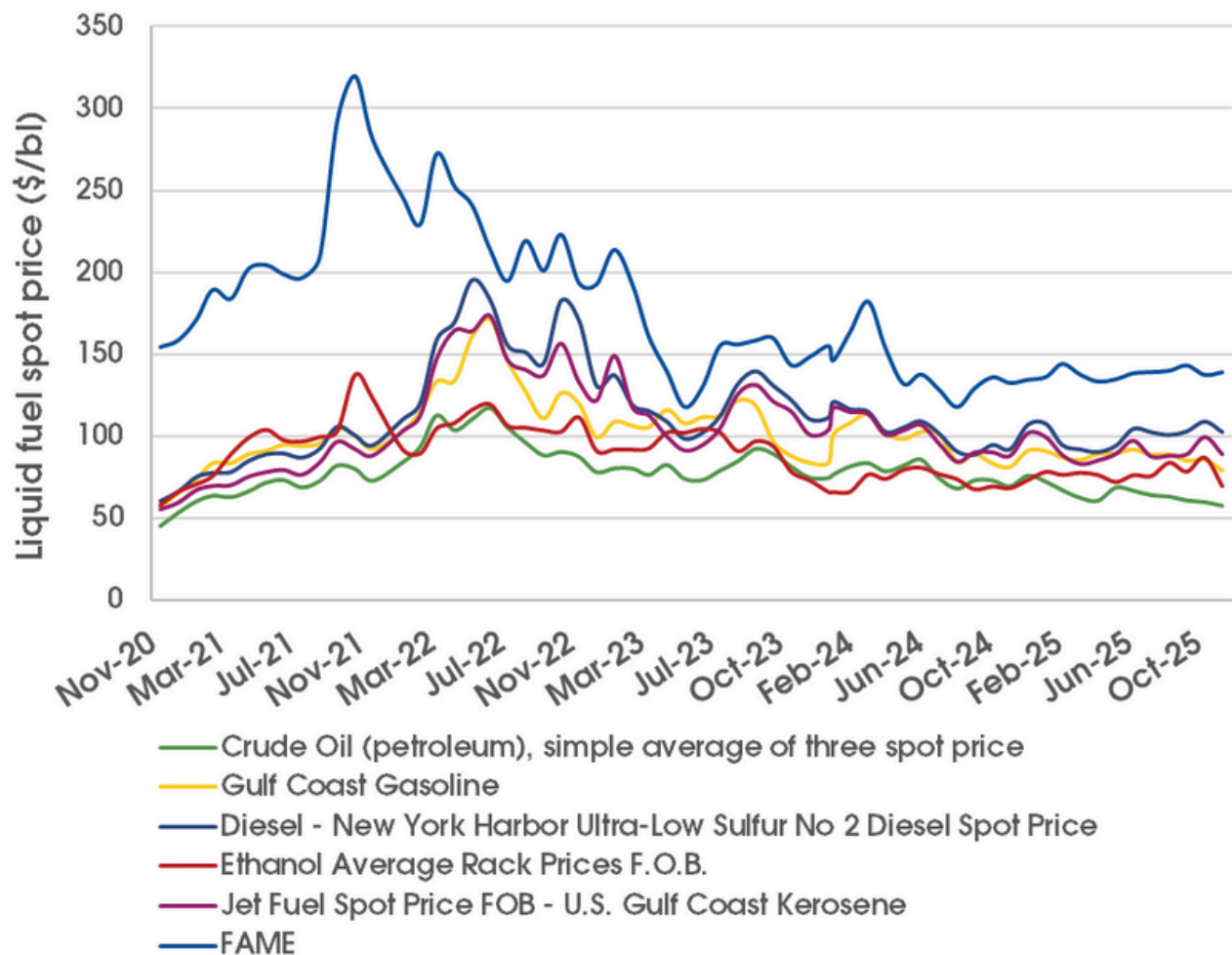
CONFERENCE

EXHIBITION

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Price Information

Historical spot prices of liquid fossil fuels and liquid biofuels. Five years of pricing up to November 2025 are given in \$ per barrel.



Prices of Crude oil, diesel, jet fuel, gasoline and ethanol are recorded from Trading Economics
 Prices for FAME from Neste (NB: Prices for June to August 2024 and January 2025 to present refer to UCOME only)

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Alder Bioinsights News Review is edited by Konstantinos Drousiotis for Alder BioInsights subscribers. Feedback is welcome. The Review has been compiled in good faith and Alder BioInsights does not accept responsibility for any inaccuracies or the products or services shown.





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