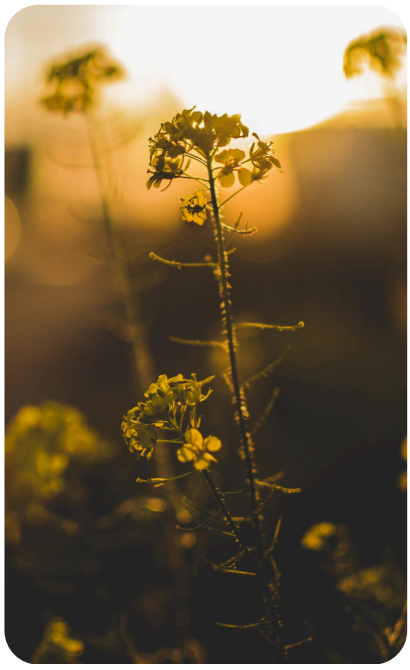
NEWS REVIEW

March 2026

Feedstocks

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

Announcements & Commentary



Research & Development

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

FOREWORD

Welcome readers, to this month's Feedstocks and Biorefinery News Review.

The Bio-based Industries Consortium (BIC) and the Renewable Carbon Initiative (RCI), together with nova-Institute and partners, have commissioned a study which concluded that sustainably sourced agricultural and woody biomass can realistically provide about 20% of the global carbon demand of the chemicals and derived materials sector by 2050 - up from roughly 5.5% in the EU and 10% worldwide today - without jeopardising food and feed supply or existing biofuel quotas, although going beyond 20% with biomass alone is considered challenging. Food and feed use remains the top priority, and current regulation i.e. REDIII, which sets targets for renewable energy but not for bio-based chemicals and materials, creates a market pull towards biofuel applications. Nonetheless, projected increases in crop production and moderate "Green High Tech" yield gains of around 10% beyond business-as-usual are sufficient to cover the sector's future demand for starch, sugar and vegetable oil feedstocks, with more ambitious high-tech scenarios theoretically enabling up to 40% if policy allowed.

To reach and possibly exceed this 20% target sustainably, the paper emphasises greater use of lignocellulosic feedstocks such as straw, wood and biowaste, including underused maize and rice straw, while warning that second-generation biomass faces strong competition from sustainable aviation fuels (SAF), which benefit from powerful quotas and could restrict access for chemicals. It highlights the role of technological options like Carbon Capture and Utilisation (CCU) and synthetic aviation fuels - whose co-product naphtha can be fed into petrochemical crackers – somewhat reducing competition for biomass resources, and notes that projected 38% growth in industrial roundwood supply (especially in Asia and Europe) should make the additional wood demand from chemicals manageable, whether via a small share of roundwood, increased use of processing by-products, or limited diversion from fuelwood.

The California Forest Residual Aggregation Market Enhancement (Cal FRAME) is a pilot initiative in Placer County which builds on the wider question of whether there is enough sustainable biomass and how can we best source and supply. Nevada, and El Dorado counties took part in the pilot designed to address the logistical and financial barriers to removing woody biomass from forest lands. By centralising the collection and contracting of forest residuals through a regional "aggregation hub," the project aims to bridge the gap between small-scale wildfire fuel reduction efforts and the industrial demand for biomass feedstock in sectors like biochar, biofuels, and renewable energy. To support this, Cal FRAME has deployed a Digital Marketplace featuring tools like the California Working Forest Planner and the California Forest Industry Directory, which connect private landowners with forestry professionals and service providers.

FOREWORD

In regards to addressing challenges in biomass processing, DARPA's Fleetwood program aims to find better ways to break down its most stubborn component - lignin. This U.S-based strategic initiative designed to transform gigatons of discarded biomass waste - specifically lignin, a complex and energy-dense molecule found in agricultural and forestry residues - into high-value chemicals and essential materials. While lignin is traditionally difficult to process and often discarded or burned for low-value heat, Fleetwood utilises novel catalytic methods and advanced manufacturing techniques, such as reductive catalytic fractionation, to break it down with atomic-level precision. The program aims to create a resilient, domestic supply chain for critical products like plastics, adhesives, and composites.

Read on for the latest news.

Markets

USDA Oils Report Shows Heavy Biofuel Feedstock Use

The U.S. Department of Agriculture (USDA) annual Fats and Oils Report for 2025 shows large volumes of vegetable oils and animal fats moving through U.S. processors, a key signal for food costs, crush demand, and biofuel feedstock availability.

In the vegetable oil categories shown, NASS totals indicate palm oil use in processing reached about 2.08 billion pounds in 2025, while palm kernel oil use totaled about 519 million pounds. Sunflower refining activity also remained meaningful, with about 405 million pounds of crude sunflower oil processed and roughly 396 million pounds of once-refined sunflower oil produced.

Click here to read the full report.

Arable Market Report – 9 March 2026

UK feed wheat futures (May-26) closed Friday at £171.60/t, gaining £2.60/t from 27 February to 6 March, the highest closing price this year. The relative strength index (RSI) for the May-26 contract gained from 52 on 27 February to 65 on 6 March (Figure 1).

Due to the surge in crude oil prices this morning, there is support across the grain futures complex. May-26 futures were trading at £174.95/t (11:00am) this morning, the highest level since November 2025, and Nov-26 futures were trading as high as £185.00/t (10:00am), the highest level since August 2025.

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California Forest Residual Aggregation Market Enhancement (Cal FRAME) Biomass Aggregation

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Placer, Nevada, and El Dorado counties have been part of a pilot partnership under the Cal FRAME initiative to address barriers to statewide biomass removal. These three partner counties have engaged with water districts, cities, special districts, fire safe councils, tribes, utilities, NGOs, and others to research and develop coordinated solutions to biomass removal challenges in our tri-county region.

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Is there Enough Biomass to Defossilise the Chemicals and Derived Materials Sector by 2050?

This reports presents the findings of a joint project of the Bio-based Industries Consortium (BIC) and the Renewable Carbon Initiative (RCI), which focuses on whether agricultural and woody biomass combined sustainably provide enough biomass to meet 20% of the future carbon demand of the chemical and derived materials industries in 2050 (up from 5.5% (EU27) and 10% (global) in 2023).

Click here to read the full report.

Research & Development

Advanced sorting technologies – Focus: Food Waste

With over one billion tons of food waste generated annually worldwide, contributing 8-10% of global greenhouse gas emissions, effective sorting technologies are critical for environmental sustainability and resource recovery. This case story report focuses on Germany, which generates approximately 11 million tons of food waste per year, nearly 20% of EU's total volume. The economic losses of this German food waste are estimated at around 30 billion euros annually, while it also is resposible for 4% of Germands greenhouse gas emissions. With the EU's mandatory food waste sorting policy in force since 2024, advanced sorting technologies are essential to reduce per capita food waste 50%, by 2030 to meet the UN Sustainable Development Goal (SDG) 12.3 goal.

This report by IEA Bioenergy TCP Task 36 (Material and Energy Valorisation of Waste in a Circular Economy) provides an overview of the food waste sorting technologies available in the market from mechanical systems to artificial intelligence (AI) applications.

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Advancing bio-based manufacturing with biomass residues

A circular economy requires not only renewable feedstocks, but also the replacement of hazardous substances embedded in today's materials. The EU-funded NewWave project set out to introduce sustainable, bio-based raw materials into several manufacturing lines, directly substituting toxic and fossil-derived chemicals. Using residual biomass as its starting point, the project combines conversion, product development and recycling strategies to reduce environmental impact across entire value chains. NewWave's approach is based on thermochemical fractionation (TCF). "TCF is a unique technology that unlocks biomass and makes it available for the manufacture of green chemicals and products without adding chemicals or enzymes," explains Bert Van de Beld, NewWave project coordinator.

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Carbon Direct and C2X Announce Collaboration on Pioneering Forestry Residue-to-Biofuel Project

Carbon Direct and C2X have announced a new collaboration to advance the Beaver Lake Biofuels project in Louisiana. This project presents a pioneering approach to biomass carbon removal and storage (BiCRS), transforming forestry residues and by-products into both clean fuel and high-quality carbon dioxide removal (CDR) credits.

Click here for more information

Wood & Crops

Croatia to Build Biomass-Powered Data Centre Using Olive Oil Waste

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A Croatian engineering firm is developing a data centre that will run on biomass energy generated from waste material produced by the country's olive oil industry.

Inovapro plans to construct what it describes as a "green AI data centre" in Čaporice, near Trilj, approximately 30 miles northeast of Split. The €20 million facility will have a capacity of around 3MW and is expected to be completed in the first half of 2027.

The project's key feature is its integration with an adjacent energy park that will convert olive production waste and discarded materials from Croatia's tourism and hospitality sectors into biomass power. After olive oil extraction, most of the fruit becomes waste, and the leftover material — known as pomace — poses disposal challenges due to its acidity and toxicity.

The two facilities will operate symbiotically. Excess heat from the data centre will be redirected to the energy park, where it will help dry olive pomace. The park is designed to process up to 12,900 tonnes of bio-waste each year across a five-hectare site, effectively transforming a disposal problem into an energy resource.

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Oilseed rape looks set to bounce back as crop area rises

Optimism is growing in the oilseed rape industry with this season's crop area rising, buoyed by last summer's high yields, firm rapeseed prices and reduced risk from one key damaging pest.
This season's larger crop is looking well established this winter and is set to produce a harvest of more than 1m tonnes, which will help cut big imports of rapeseed into the UK.

The threat from the crop's number one pest – cabbage stem flea beetles (CSFB) – is looking lower for the second successive season, and James Warner, managing director at co-operative United Oilseeds believes this and other factors make the outlook more promising.

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Cytotrait secures £3M seed funding

Cytotrait, a biotechnology spinout company from The University of Manchester focussed on the development of novel traits for food and agriculture, today announced the close of its £3M seed funding round. The investment was led by Northern Gritstone, with contributions from the UK Innovation & Science Seed Fund (UKI2S, managed by Future Planet Capital), and Northern Universities Ventures Fund, managed by Parkwalk in collaboration with Northern Gritstone.

Cytotrait's seed funding will enable the Company to build on strong early data from its proprietary Mutant Organelle Selection System (MOSS) technology, initiating new development programmes to explore enhanced traits in major crop species.

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Ence's biomass platform powers on as pulp losses hit €55 million

After posting losses of €55 million in 2025, Ence announces that it will accelerate its focus on specialty pulp and sees positive prospects for 2026 driven by the rise in pulp prices, which have climbed to $1,330/t

Pulp prices shaped the year's results for Ence. Financial year 2025 was marked by a decline in celulosa prices, which fell to an average of $1,086/t. The outlook for 2026 is favourable. Prices have already reached $1,250/t, with leading producers announcing increases to $1,330/t.

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India faces hotter, drier February, impacting winter crops such as rapeseed

After an unusually warm January, India will be warmer and drier this month, raising risks for key crops such as wheat, rapeseed and chickpeas, according to local weather office data reported by The Star.

The country's northwestern wheat-growing region was expected to receive less than 78% of its long-term average rainfall, Mrutyunjay Mohapatra, director-general of the India Meteorological Department, said on 31 January.

Maximum and minimum temperatures in most parts of the country would be above average in February, impacting crops such as wheat and barley, he added.

"Below-normal cold-wave days are likely over several parts of northwest and adjoining central India," he was quoted as saying in the 1 February report.

Click here for more information.

Biorefinery

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Celtic Renewables secures further £10m backing for Grangemouth biorefinery project

Celtic Renewables, the breakthrough Scottish green chemicals firm, has secured £16.23 million in public and private funding to scale its production of high-demand green chemicals.

The funding comprises £5 million in new investment from Scottish Enterprise, Scotland's national economic development agency, and £5 million from Celtic's existing private investors, alongside £6.23 million from the Grangemouth Just Transition Fund that was awarded by the Scottish Government in December.

The latest investment was announced by Scotland's Secretary for Climate Action and Energy Gillian Martin on a visit to Celtic Renewables' biorefinery at Grangemouth today.

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Eni: the investment in the development of biorefining in Sannazzaro de' Burgondi is confirmed

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Eni announces a further important strategic investment in biorefining. In addition to the Priolo project, the final investment decision (FID) has also been approved for Eni's plan to convert certain units of the Sannazzaro de' Burgondi refinery (Pavia, Lombardy) into a biorefinery.

Both projects represent a significant step forward in developing Enilive's biofuel production capacity. The two biorefineries will be completed by 2028 and will offer maximum flexibility in producing both HVO diesel (Hydrogenated Vegetable Oil) and SAF-biojet, Sustainable Aviation Fuel.

The new biorefinery in Sannazzaro de' Burgondi will not affect the plant's existing traditional fuels production capacity. Instead, it will introduce additional biofuel production from renewable raw materials, further diversifying the range of products available to the market.

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Energy from Waste

SIVALOR renews its trust in SUEZ to make its Energy-from-Waste plant a European benchmark in environmental, energy and industrial performance

SIVALOR brings together three urban communities (Pays de Gex, Haut Bugey and Annemasse Les Voirons), six intermunicipal communities (Terre Valserhône, Genevois, Usses et Rhône, Pays Rochois, Vallée Verte, Arve et Salève), and 146 municipalities in Ain and Haute-Savoie departments. Its mission is to recover energy from household waste across a territory of more than 434,000 inhabitants and to raise public awareness about more responsible waste management.

As part of a 10-year global performance contract, SUEZ is committed, alongside SIVALOR to turn the Energy-from-Waste plant into a true "resource factory" and a European benchmark for environmental, energy, and industrial performance. Several concrete levers will be deployed to achieve this objective.

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Other News

Upgrading biomass waste into strategic materials

Every year, gigatons of biomass from agricultural and forestry residues are discarded worldwide. This waste is rich in lignin – an energy-dense but difficult-to-process molecule that gives plants their structure.

To transform this waste into a strategic advantage, DARPA has launched the Fleetwood program to develop novel catalysts and advanced manufacturing processes to convert lignin into value-added chemicals and materials, strengthening U.S. economic and national security.

Click here for more information

Events

14th - 15th April 2026
Biofuels International Conference & Expo 2026
Barcelona, Spain

Click here for more information

21st - 23th April 2026
Argus Biomass Conference
London, UK

Click here for more information

19th - 22th June 2026
34th European Biomass Conference and Exhibition 2026
The Hague, Netherlands

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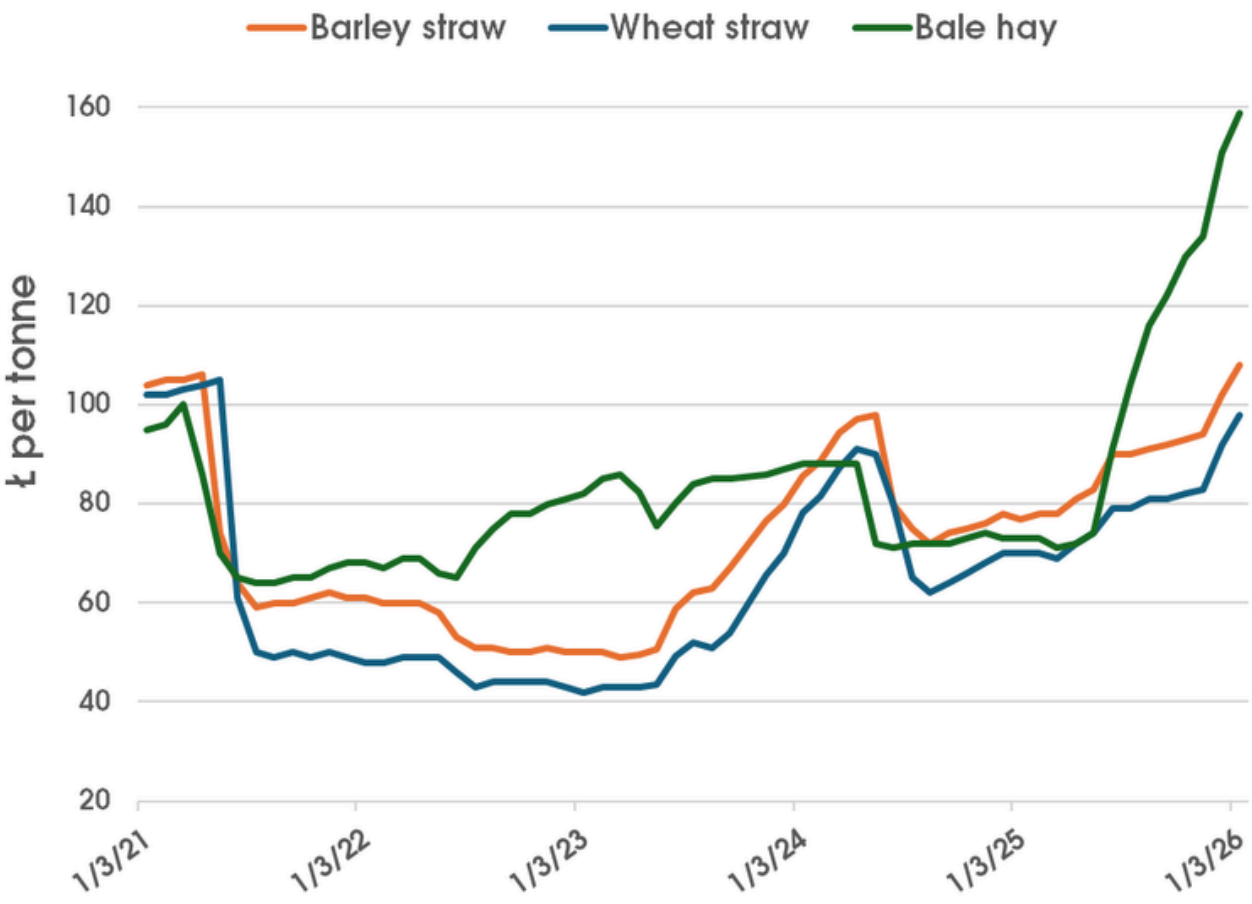
Feedstock prices

UK spot prices of bagged wood pellets, delivered. Grain and oilseed prices are across all main regions of the UK.

	Wood Pellets	Milling wheat	Feed wheat	Feed barley	Oilseed rape
	£/kg, 5% VAT	£/tonne, ex-farm	£/tonne, ex-farm	£/tonne, ex-farm	£/tonne, ex-farm
High	0.42	178.00	170.00	161.00	419.00
Low	0.35	171.00	151.00	139.00	400.00
Average	0.38	174.50	162.45	151.20	411.64

For wood pellets prices we consider UK pellet traders advertised selling prices.
For details on grains and oilseed prices, see Farmers Weekly.

Monthly prices of ex-farm Hay and Straw in England and Wales. Prices shown are for 5 years up to January 2026.



Source: British Hay and Straw Merchants' Association, Defra

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Alder BioInsights is a leading international consultancy with expertise on the conversion of biomass to bioenergy, biofuels and biobased products.

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