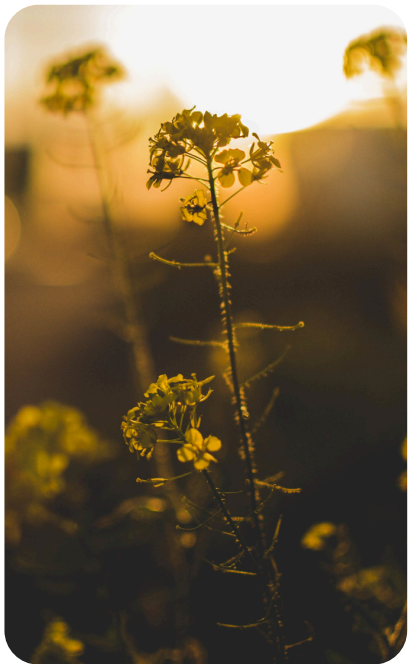
NEWS REVIEW

July 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

Future Market Insights Inc. has recently published a report on starch derivatives noting that while their market is growing, the margins increasingly depend on processing capacity, energy cost, weather damage and import competition, not just demand. It highlights corn as the dominant input, while wheat, potato, cassava, and tapioca are gaining strategic importance for different functional and regional needs. It argues that integrated processors with wet-milling scale, modification capability, multiple sourcing regions, and energy/logistics resilience are best placed to protect margins. It also notes that volatility in crops, energy, trade, and plant utilisation can quickly pressure costs, so reliability is becoming a competitive advantage in its own right.

Looking at market developments concerning maize specifically, the National Corn Growers Association's (NCGA) new demand strategy argues that U.S. maize needs three major demand-growth pathways over the long term: maritime fuels, sustainable aviation fuel, and biobased products through biomanufacturing. The report frames these as large, largely untapped markets that could absorb billions of additional bushels of maize annually, helping offset weak farm economics and supporting future profitability for growers. It also reinforces NCGA's near-term priorities around year-round E15 access, trade, infrastructure, and research, with the broader message that maize can remain central to both energy security and industrial decarbonisation.

The Farm Progress newsagent notes that U.S. soybean conditions are still being watched closely, but the bigger story is not just acreage or crop progress - it is how weather and quality risks can shape supply reliability and pricing later in the season. Taken in combination with NCGA's outlook, it suggests that maize markets are being pulled in two directions at once: producers needing stronger demand long-term, while end users are also dealing with uncertainty around crop quality, timing, and logistics.

Agricultural R&D news includes a £2.4 million UK pilot project `RePeat', which aims to create a "circular farm" model that produces both food and low-carbon fuel on the same estate. Based in Lincolnshire, the three-year project will test how farm-grown biomass can be converted into renewable dimethyl ether, while heat and carbon dioxide from the fuel process are reused to support controlled-environment food production. The wider goal is to show a scalable way to cut agricultural emissions without reducing productivity, offering a practical blueprint for future UK farming.

A key challenge for the biorefining industry is ability to produce biomass without impacting food production. Bayer and bp have formed a long-term alliance to scale camelina, branded as newgold®, as an intermediate oilseed crop for biofuels in North America. The core idea is to create a new low-carbon feedstock that can fit into existing farming systems without displacing major food crops.

Camelina is positioned as a flexible rotational crop that can be grown between seasons, within established rotations, or on marginal land, which helps limit competition with food production and offers farmers an additional revenue stream.

Bayer has said camelina may offer strong sustainability characteristics and lower input requirements, while bp sees it as a way to help build the supply base needed for future fuel demand. In practical terms, the partnership is trying to move camelina from trial and development into a commercial value chain, with field-scale testing already underway in selected regions of the U.S. Northern Plains and western Canada.

Read on for the latest news

LEXICON

Our bioeconomy lexicon continues to be a popular resource for many of our followers and industry colleagues.

The lexicon includes over 200 widely used terms, clearly defining each of them and providing advice regarding their use. This is also an interactive tool, allowing users to suggest terms they would like to see included.

If you follow us on Linkedin then keep an eye out for our weekly featured terms and insights chosen by our team. If you're not following us, then you can find us here:

Policy

Defra publishes Farming Roadmap 2050 - A long-term plan giving farmers clarity to invest, adapt and build a profitable, productive, sustainable and resilient future for English farming.

A long-term plan giving farmers clarity to invest, adapt and build a profitable, productive, sustainable and resilient future for English farming.

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USDA to release 45Z feedstock rule, new feedstock carbon intensity calculator

The USDA on June 25 announced its final Regenerative Feedstock Rule is ready for release. The action provides a voluntary pathway for farmers to capture value from regenerative agriculture practices via the 45Z clean fuel production credit.

The agency did not release the full rule on June 25, but indicated the final rule and related USDA Feedstock Carbon Intensity Calculator will be available on the USDA.gov website once it is published in the Federal Register.

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NCGA Releases Demand Strategy for U.S. Corn's Next 250 Years

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The National Corn Growers Association today released a new report outlining a strategy to secure new demand for American corn. As farmers face a projected fourth consecutive year of losses in 2026, NCGA is setting a course toward markets that could collectively unlock demand for billions of additional bushels of corn annually.

The report identifies three new high-growth sectors where NCGA looks to compete:

- Maritime Fuels: Securing 10% of the global maritime fuel market fueled by corn-based ethanol would equate to 3 billion bushels of annual new demand.
- Sustainable Aviation Fuel: Securing 10% of the global SAF market fueled by ethanol-to-jet technologies would represent 1.7 billion bushels of annual demand.
- Biobased Products and Biomanufacturing: Securing 10% of the global biochemical and biobased product market, with corn-based feedstocks capable of replacing the petroleum in 10% of the world's plastics would total 6.6 billion bushels of potential demand.

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Research & Development

Technical Guidelines for the Production of Regenerative Agricultural Biofuel Feedstocks

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On June 25, 2026, the U.S. Department of Agriculture (USDA) announced the release of a final rule on Technical Guidelines for the Production of Regenerative Agricultural Biofuel Feedstocks. The final rule establishes guidelines for quantifying, reporting, and verifying the carbon intensity (CI) associated with the production of regenerative biofuel feedstock commodity crops grown in the United States.

The final rule will be posted for public inspection on June 26, 2026 at regulations.gov and will be published on June 29, 2026.

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Wood & Crops

Processing Capacity and Feedstock Risk in Starch Derivatives: Why Corn, Wheat, Potato, and Tapioca Supply Is Deciding Margin Stability

Reliable processing capacity and diversified feedstock sourcing are becoming decisive competitive advantages as starch derivative manufacturers navigate crop volatility, energy costs, and demand for high-performance specialty starches.

- Processing capacity is becoming a stronger margin factor in starch derivatives because suppliers must secure reliable crop inputs, energy access, wet-milling efficiency, drying capacity, modification capability, and logistics continuity before they can defend contracts.
- Corn remains the most important feedstock in starch derivatives, but wheat, potato, cassava, and tapioca are becoming more strategically important where buyers need specific texture, clarity, clean-label positioning, or regional sourcing flexibility.
- Feedstock risk is not only a crop-price issue. Weather disruption, low starch content, poor grain quality, cellulose load, energy volatility, trade policy, import competition, and underutilized plants can all affect production cost and delivery reliability.
- The strongest advantage belongs to integrated processors with crop access, wet-milling scale, modification technology, application labs, multiple sourcing regions, and the ability to shift between native starch, modified starch, glucose syrup, maltodextrin, resistant starch, and industrial starch applications.
- The biggest risk is assuming starch derivatives are simple commodity ingredients. In reality, buyers are increasingly paying for supply security, consistent functionality, documentation, and reliable production capacity as much as they are paying for starch itself.

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USDA: Soybean planted acreage up 5% in 2026

The USDA's National Agricultural Statistics Service on June 30 announced U.S. farmers planted an estimated 85.4 million acres of soybeans in 2025, up 5% when compared to last year. Planted acreage is up or unchanged in 20 of the 29 estimating states.

To compile the data released June 30, NASS surveyed approximately 90,300 farm operators during the first two weeks of the month. The survey gathered data on actual acres planted by U.S. agricultural producers.

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New rules for biotech crops clear final hurdle in Parliament

The European Parliament on Wednesday gave final approval to looser rules for gene-edited plants, fending off last-minute bids to unravel the political compromise with EU countries.

Long-awaited legislation on new genetic modification techniques (NGTs), dating back to a 2023 Commission proposal, will soon become law. The new rules will free crops with targeted gene tweaks that could also occur naturally or through conventional breeding from the EU's burdensome GMO rules, paving the way for new plant varieties to enter the market.

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UK-first £2.4m 'circular farm' aims to turn crops into food and clean fuel

A £2.4m "circular farm" project aiming to turn crops into both food and low-carbon fuel has launched in Lincolnshire, in a UK-first move that could reshape the future of farming.

The three-year RePeat initiative is designed to tackle one of agriculture's biggest challenges — producing food while cutting emissions and adapting to climate and market pressures.

The project brings together the University of Lincoln, Pollybell Farm and energy supplier Flogas, backed by Defra's Farming Innovation Programme and Innovate UK.

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Fueling agriculture: biofuels as the catalyst

Technology and innovation have enabled US farmers and ranchers to supply more food and fuel than ever before—a trend that promises to accelerate as artificial intelligence (AI) powers advances in seed technologies, crop protection, regenerative farming practices, and digital agriculture. In 2025, the US experienced another record-breaking harvest, extending the largest-ever surplus of grains and oilseeds. Similar trends are being observed globally. For perspective, world corn yields have increased 1.5% per year over the past decades, helping push global grain, oilseed and fiber stocks to nearly 1 billion metric tons in 2025.

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Bayer and bp form strategic alliance to jointly scale camelina as intermediate crop for biofuels

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BHP and the Global Centre for Maritime Decarbonisation (GCMD) have blended biofuels from two distinct feedstocks—used cooking oil and waste animal fats —and introduced the lower-emissions marine fuel into a BHP-chartered bulk carrier as part of a pilot project.

The BHP and GCMD pilot will assess how biofuels from multiple feedstocks can be blended, handled, and introduced under real-world operating conditions using existing used cooking oil bunkering infrastructure.

At the same time, insights from this pilot will help identify solutions to challenges related to fuel quality, handling, traceability, and onboard vessel performance.

Biofuels for global shipping today rely heavily on used cooking oil – a feedstock whose availability is approaching its projected limits. Biofuel from waste animal fats presents a promising option to expand the supply of lower-emissions marine fuels.

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Funding Notice: Department of Energy Announces up to $10 Million for Algal Systems Research and Development to Expand U.S. Bioenergy Feedstock

The U.S. Department of Energy (DOE) Bioenergy Technologies Office (BETO) announced up to $10 million in funding to support high-impact research and development (R&D) focused on algae system cultivation and preprocessing. The notice of funding opportunity (NOFO), Maximizing Algal System Yield (MASY), will support BETO's R&D priorities in the area of Renewable Carbon Resources for advancing algal systems.

Algae can provide abundant, feedstock sources for affordable, reliable biofuels, bioproducts, and bioenergy that do not compete with existing feedstocks. For this NOFO, algae include microalgae, cyanobacteria, and macroalgae (also referred to as seaweed).

The MASY NOFO seeks applications to address 'pinch points' (defined as a challenge area within a proposed system that, if relieved, would enable scaling towards commercialization) in algal system operations that currently limit algae expansion as a domestic bioenergy feedstock. By addressing these challenges now with targeted applied R&D, BETO will accelerate the development of innovative technologies that can enable algae developers to bring new bioproducts to market, that will grow domestic supply chains, expand access to renewable feedstocks, and improve energy security.

This funding opportunity aligns with EERE and national goals to deliver a resilient energy future, by maximizing the use of domestic resources, and supporting the growth of the bioeconomy to provide good paying jobs for all Americans.

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UK waste wood sector proved resilient in 2025 amid market pressure

The UK's waste wood sector continued to process over four million tonnes of waste wood in 2025 despite challenging market conditions.

According to the latest annual statistics published today (June 25) by the Wood Recyclers' Association (WRA), 4.013 million tonnes – or 89% of all waste wood generated in the UK – was sent for reuse, recycling or recovery last year. This represented a 7.3% fall in processing compared to 2024.

The decline comes after the market came under significant pressure last year, with a series of unplanned outages at end-use facilities creating oversupply and putting pressure on storage capacity.

While an 89% processing rate remains strong compared to other waste streams, the WRA said the decline highlighted the need for more flexible and risk-based regulation around waste wood storage to ensure as much waste wood is utilised as possible, with the best environmental outcome.

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Arable Market Report – 6 July 2026

The report can be found via the link below.

Click here for more information

Biorefinery

Old zinc mine becomes Ireland's first National Biorefinery Pilot Plant

An old zinc mine in Lisheen, Co Tipperary, has been given a new purpose as the home of Ireland's first National Biorefinery Pilot Plant.

The facility is designed to help businesses turn waste, and natural materials from agriculture and industry, into useful products such as renewable energy, chemicals and new materials as part of the bioeconomy.

Backed by almost €10 million in state and EU funding, the plant will allow companies to test new ideas before investing in large-scale production.

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Improving biomass yield: New models could help biorefineries accommodate their unique needs

Before they can generate energy-efficient fuel from organic and inorganic waste, biorefinery startup companies across the nation must deal with the challenge of biomass feedstock variability. The materials that make up biomass – which is anything either directly or indirectly derived from living material – come in all shapes and sizes. This feedstock variability presents challenges to both effective biorefinery operation and efficient conversion of biomass into biofuel and biochemicals.
Improving biofuel yields across the national biomanufacturing industry will help the United States become a dominant force in advanced manufacturing and provide alternative, efficient fuel for mass transportation. But this ambitious goal cannot be achieved without first understanding and addressing feedstock variability.

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Acelen Renewables and Trafigura Sign Strategic Agreement to Supply Feedstock and Market Renewable Fuels from Bahia Biorefinery

Acelen Renewables, an energy company of Mubadala Capital, and Trafigura, one of the world's largest independent commodity trading companies, signed a strategic agreement to supply feedstocks and market renewable fuels to be produced by the biorefinery currently under development in the state of Bahia, Brazil.

This agreement is a significant milestone in the project schedule and reinforces Acelen Renewables's readiness to begin constructing the facility, following the recent announcement of a US$1.5 billion financing package. Using HEFA (Hydroprocessed Esters and Fatty Acids) technology, the plant will have the capacity to produce up to 1 billion liters per year of SAF (Sustainable Aviation Fuel) and HVO (Renewable Diesel).

Under the terms of the agreement, Trafigura will participate in two strategic stages of the value chain: feedstock supply and marketing of the plant's future production. This integrated model enhances operational predictability, strengthens feedstock supply security for the project, and reduces risks associated with its implementation and operation.

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Bioethanol

Philippines bans imported sugar and molasses for bioethanol to support domestic sugar industry

The Sugar Regulatory Administration (SRA) has prohibited the importation of sugar, molasses and other sugarcane-derived products for use in bioethanol production, tightening enforcement of the country's biofuels policy and strengthening support for domestic sugar producers.

The measure was introduced through Sugar Order No. 4 dated May 18 and made public on June 22, Manila Bulletin reported.

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Waste

USDA CCC: No actions expected under Feedstock Flexibility Program

The USDA's Commodity Credit Corp. on June 30 announced it does not expect to purchase and sell sugar under the Feedstock Flexibility Program for crop year 2025, which runs from Oct. 1, 2025, to Sept. 30, 2026.

The CCC is required to announce quarterly estimates of sugar to be purchased for the FFP based on crop and consumption forecasts. The agency issued its latest quarterly estimate on June 30.

Under federal law, processors of sugar beets and domestically grown sugarcane can obtain USDA loans when the harvest begins. The loans provide interim financing so that commodities can be stored after harvest, when prices are typically low, and be sold later, when prices are higher. When the nine-month loan matures, the processor can repay the loan in full or forfeit the collateral sugar to the USDA.

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Tyre pyrolysis oil resource framework published

How to meet 'end of waste' status for tyre pyrolysis oil produced from the pyrolysis of waste tyres.

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Events

20th - 21st October 2026

Global Bioeconomy Summit 2026

Dublin, Ireland

Click here for more information

3rd - 5th November 2026

S&P World Biofuels, Ethanol and Feedstocks Conference

Barcelona, Spain

Click here for more information

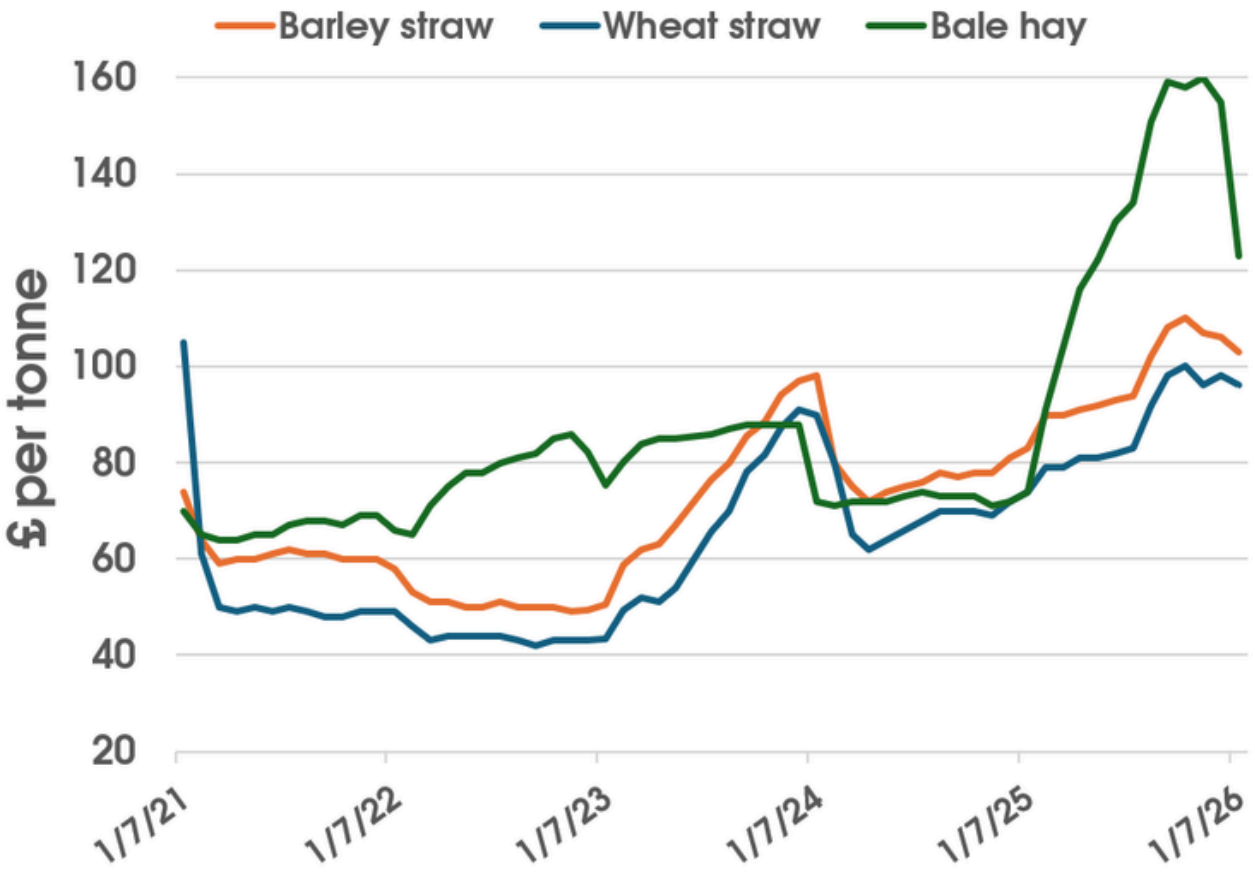
Feedstock prices

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	0.51	194.00	184.00	169.00	424.00
Low	0.35	193.00	146.00	136.00	394.00
Average	0.42	193.50	170.17	147.45	415.00

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 July 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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