EBB
EUROPEAN BIODIESEL BOARD

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BIODIESEL
BOARD

STATISTICAL REPORT

2024-2025

July 2025

ABOUT EBB

The European Biodiesel Board (EBB) is a non-profit organisation established in January 1997. The EBB gathers over has 35 member companies and 8 National Associations across 17 Member-States, representing about 70% of the European output. Biodiesel is the main European solution to reduce emissions from transport and dependence on imported oil. The EBB promotes the use of biodiesel in the European Union and is committed to fulfil international standards for sustainability in GHG emissions and sustainable feedstock. The EBB is constantly working towards the development of improved and greener technologies.

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FOREWORD

We are pleased to present the EBB Statistical Report, covering the year 2024 and offering a comprehensive overview of the biodiesel industry in the EU. This report features the latest data and trends related to biodiesel capacity, demand, supply and trade flows. It also includes production figures for both FAME and HVO from the European Biodiesel Board's members, grouped by country(s) to guarantee confidentiality.

The publication of the report reflects the EBB continued commitment to data-driven advocacy, and industry knowledge. As biodiesel remains a critical component of Europe's renewable energy landscape, providing sustainable alternatives to fossil fuels, accurate and timely information is essential for policymakers, industry stakeholders, and the public. As the main industry association representing producers of biodiesel in the EU, the EBB is keen on making this information accessible. We hope it will benefit you.

The data presented here is compiled from a combination of member input, trusted third-party research, and public sources. For the data collection, EBB collaborated with Stratas Advisors and Square Commodities, global consulting and advisory firms specialising in comprehensive analysis of the energy sector. The report covers all three products considered "biodiesel": Fatty Acid Methyl Ester (FAME), Hydrotreated Vegetable Oil (HVO) and Hydrotreated Esters and Fatty Acids (HEFA). All graphs are measured in million tonnes (Mt). Production figured include both co-processed and standalone production plants.

Xavier Noyon,

Secretary General of the
European Biodiesel Board

EBB MEMBER'S PRODUCTION

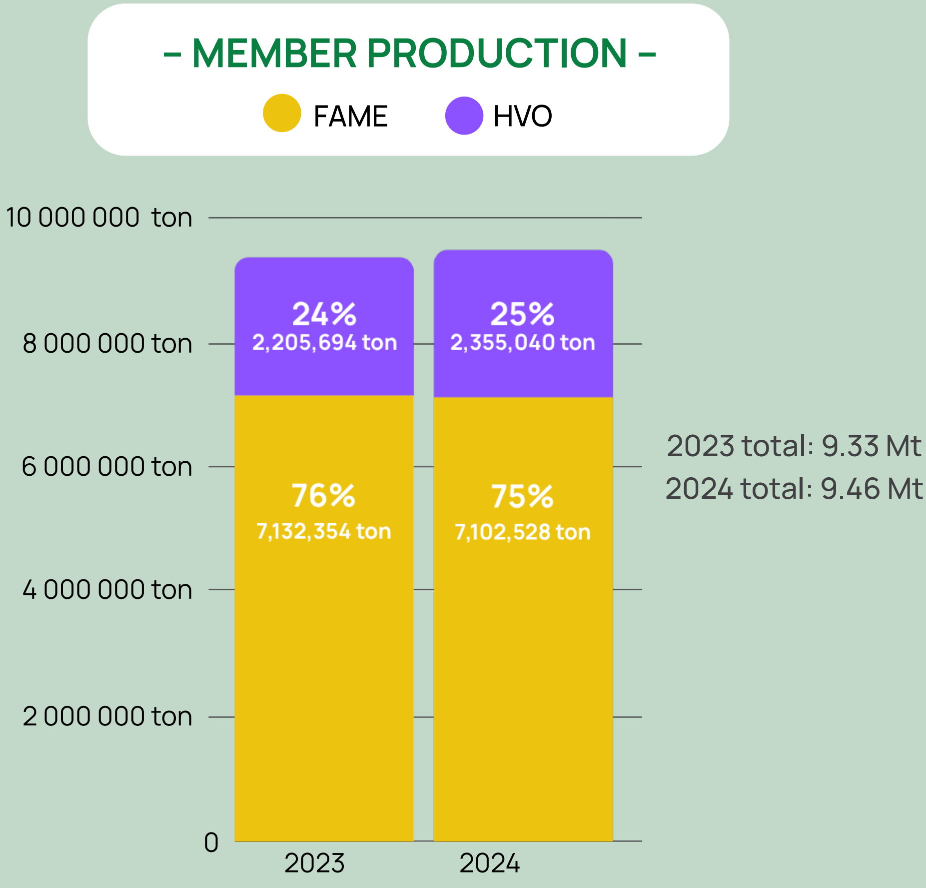
Collectively, the members of the European Biodiesel Board (EBB) represent about 70% of biodiesel production in the EU.

The first bar chart shows the breakdown by product (FAME & HVO) in the EBB member production volumes. Overall, between 2023 and 2024, production by members increased slightly, with FAME producers still suppling the large majority of the output.

In 2024, EBB produced 7.1 Mt of FAME and 2.3 Mt of HVO.

EBB production by country shows the many variations in production between EU member states. Germany, France and Italy lead in EU biodiesel output. Belgium and the Netherlands also represent a fair share. The production overall is stable and these countries maintain their dominant positions. Countries like Spain & Portugal, and Central and Eastern European countries, contribute stable although smaller shares.

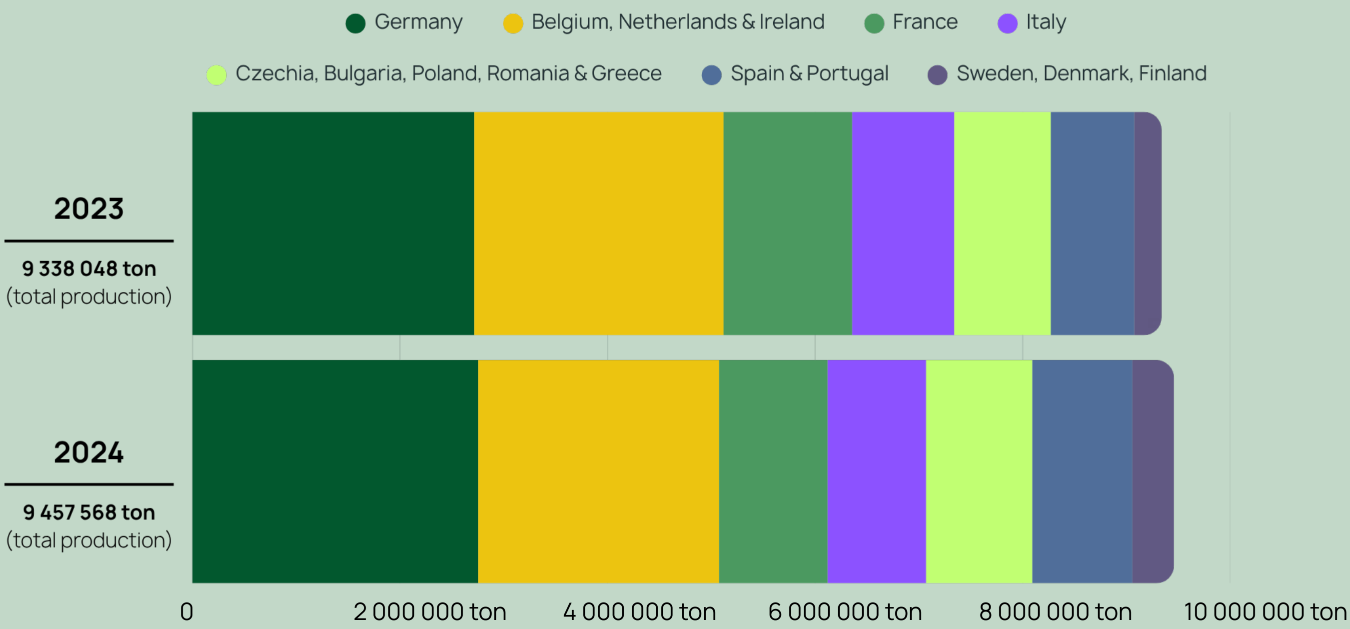
Thirdly we show the break-down of EBB presentiveness of the overall market. The EBB continues to be the leading association representing biodiesel producers in Europe, with its members representing about 70% of the EU production.



EBB MEMBER'S PRODUCTION

– MEMBER PRODUCTION –

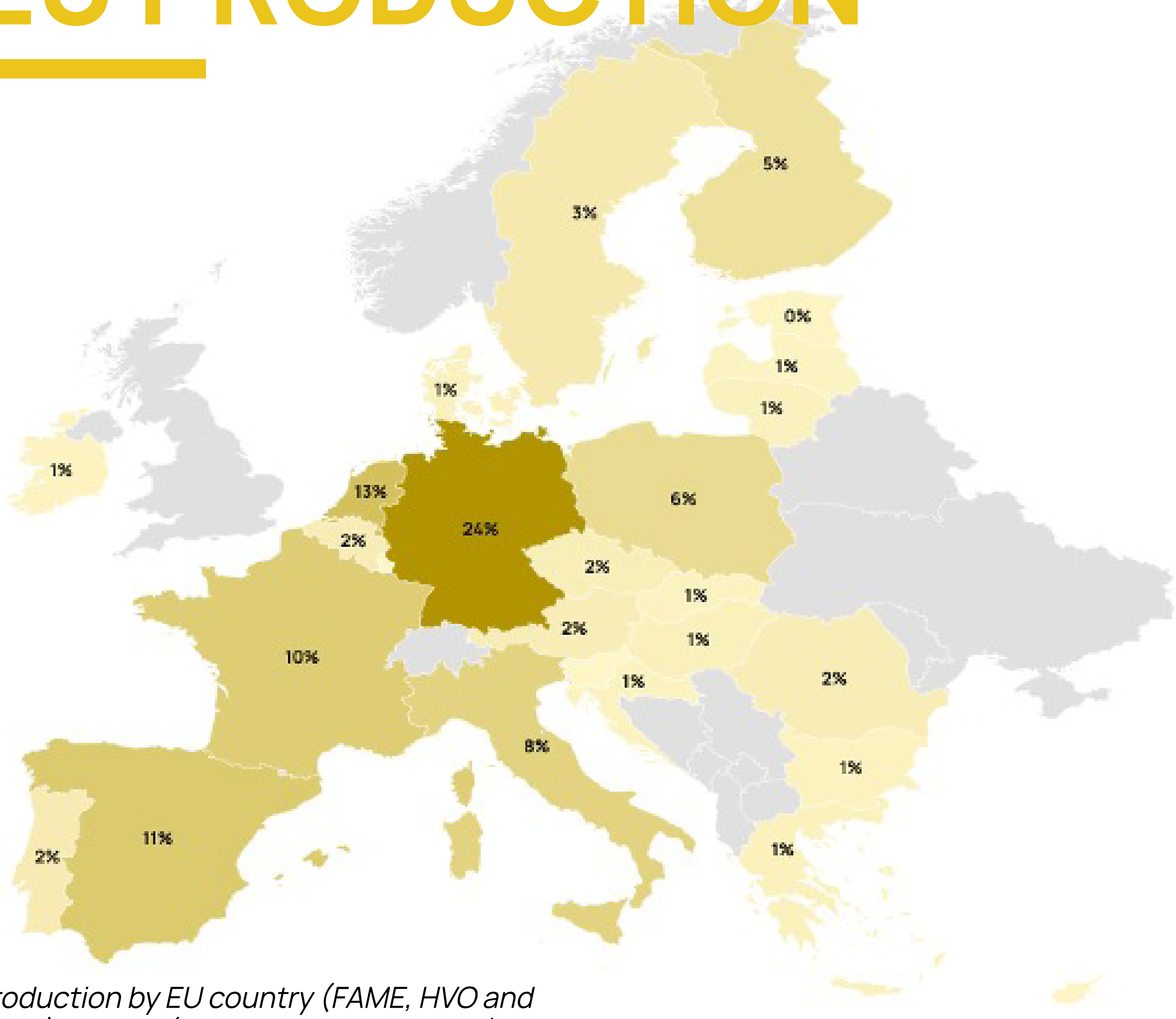
BY COUNTRY / REGION



COUNTRY / REGION	2023 PRODUCTION	2024 PRODUCTION	Q1 - 2024 PRODUCTION	Q2 - 2024 PRODUCTION	Q3 - 2024 PRODUCTION	Q4 - 2024 PRODUCTION
Germany	2,715,169	2,753,627	729,667	677,074	651,422	695,465
Belgium, Ireland & Netherlands	2,401,892	2,319,838	678,825	650,920	508,115	481,977
France	1,239,524	1,047,971	286,573	253,517	254,274	253,607
Italy	984,846	947,670	246,148	298,403	267,387	135,731
Czechia, Bulgaria, Poland, Romania & Greece	929,844	1,024,100	256,584	237,636	268,237	261,643
Spain & Portugal	803,723	963,083	233,686	271,958	298,770	158,669
Sweden, Denmark & Finland	263,050	401,280	63,424	56,471	143,405	137,980
TOTAL	**9,338,048**	**9,457,568**	**2,494,907**	**2,445,978**	**2,391,610**	**2,125,073**

FAME and HVO, produced by EBB members ('000 tonnes)

EU PRODUCTION



Production by EU country (FAME, HVO and HEFA) in 2024 (EU-27, in million tonnes)

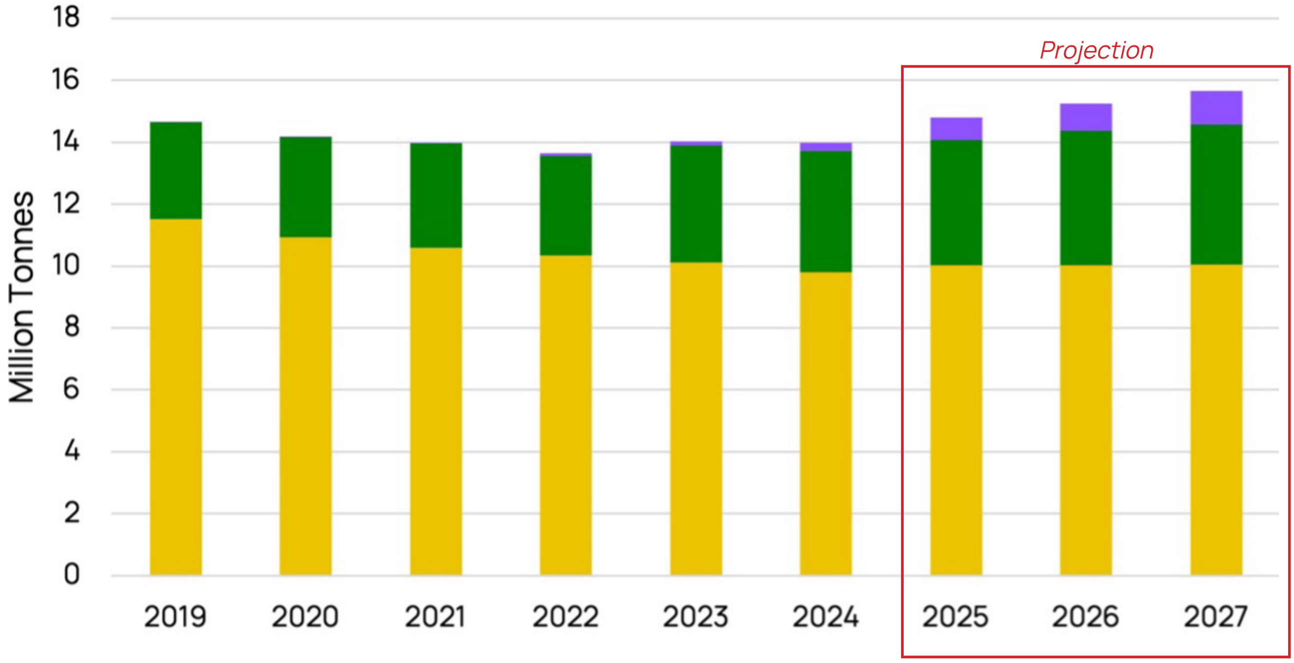
EU biodiesel production by country

LEGEND

- <10%
- 10-20%
- >20%

Mandates and targets in EU policies continue to drive the uptake of sustainable alternatives to fossil fuels, as governments are setting more ambitious climate targets in the transport sector. The EU also remains an important producing bloc when it comes to biofuels. In 2024, for all types of biodiesel (FAME, HVO and HEFA) combined, Germany remains the largest with 24% of the EU-27 production, followed by the Netherlands (13%), Spain (11%), France (10%), and Italy (8%). This top five collectively accounts for over 65% of the EU's total biodiesel production, highlighting a strong concentration of output in Western and Southern Europe.

PRODUCTION By product



Production, by product, of FAME, HVO and HEFA (EU-27, in million tonnes)

LEGEND

FAME

HVO

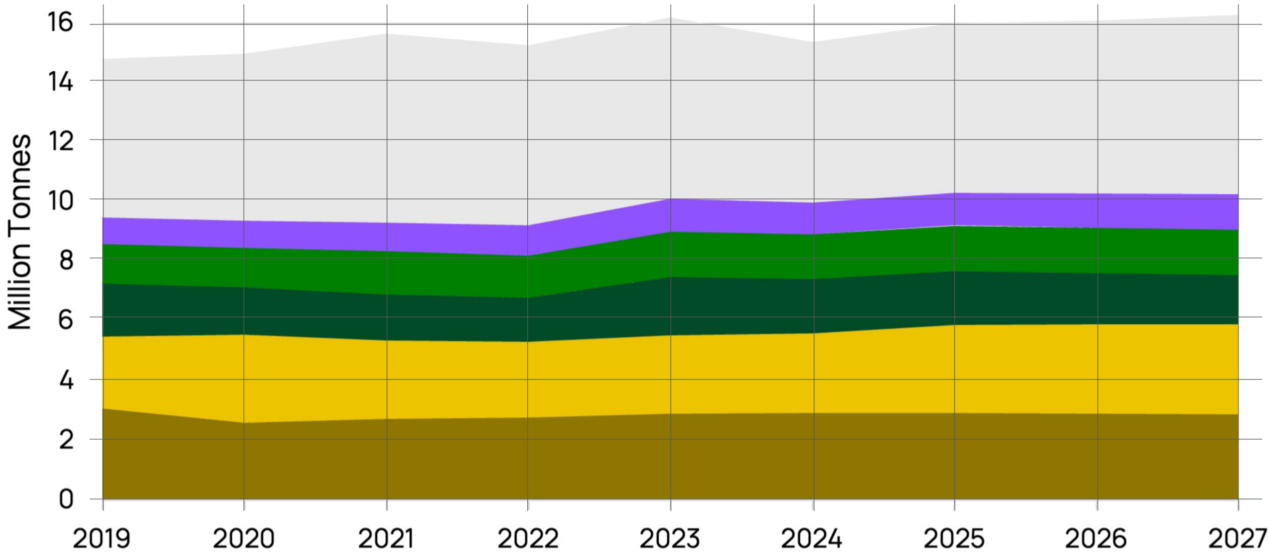
HEFA

EU biodiesel production by product

The production of biodiesel is increasing, year-on-year in response to growing demand for renewable fuels. In 2024, the EU production was estimated to be nearly 14 Mt. We see FAME continue to dominate and moderate but consistent growth in HVO volumes, rising from about 4.5 Mt in 2019 to around 5.6 Mt by 2024. HEFA, used as a Sustainable Aviation Fuel is taking flight and is rapidly becoming the main pathway for decarbonisation of the aviation sector.

Product	2019	2020	2021	2022	2023	2024	2025	2026	2027
FAME	11.5	10.9	10.6	10.3	10.1	9.8	10.0	10.0	10.1
HVO	3.1	3.2	3.4	3.2	3.8	3.9	4.1	4.4	4.5
HEFA	0.00	0.00	0.01	0.08	0.14	0.26	0.72	0.86	1.07

DEMAND



Demand by EU country (FAME, HVO and HEFA) in 2024 (EU-27, in million tonnes)

LEGEND

France
Germany
Spain
Italy
Poland
Rest of EU-27

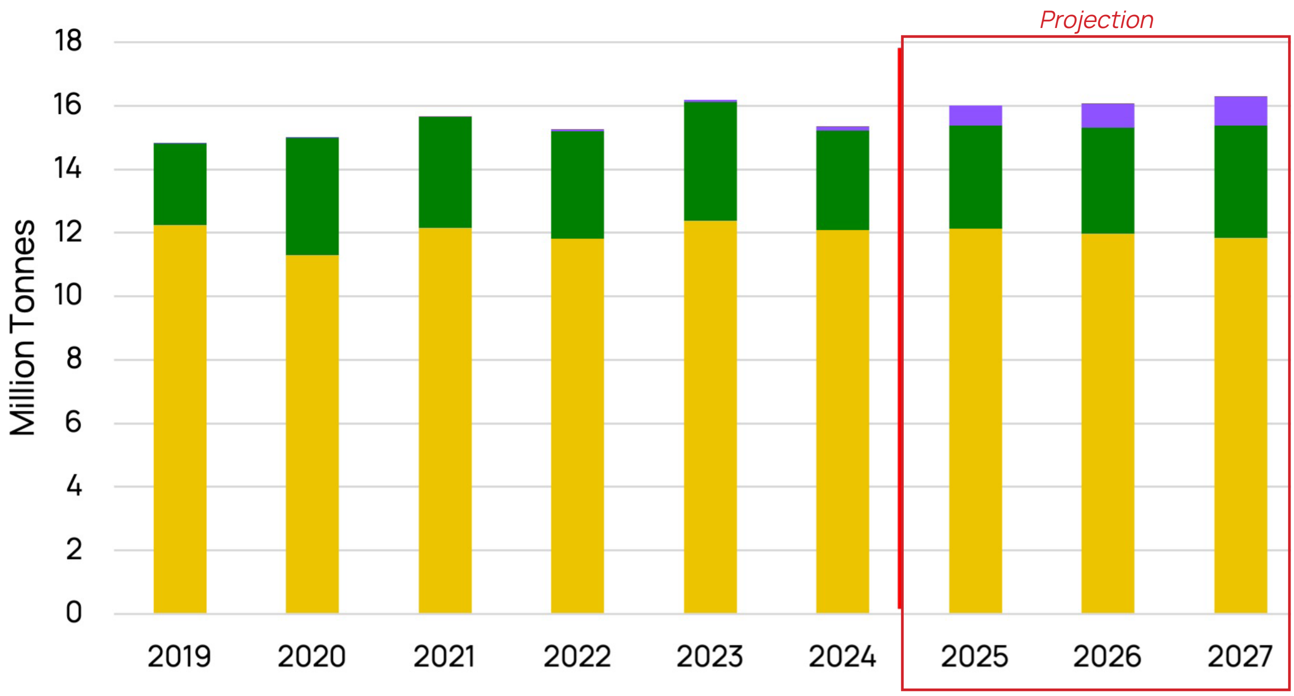
EU biodiesel demand by country

When analysing the demand for biodiesel, it's worth taking a closer look at the top five consumers. Germany and France remain the largest, consistently maintaining high demand levels. Spain also takes up a significant share. Together, in 2024, the three countries consume about half (48%) of the market demand.

The rest of the EU-27 combined accounts for the countries that did not make it into the top five. This segment grows steadily, suggesting broader EU-wide increases in biodiesel use.

Country	2019	2020	2021	2022	2023	2024	2025	2026	2027
France	3.1	2.6	2.7	2.8	2.9	2.9	2.9	2.9	2.9
Germany	2.4	3.0	2.6	2.6	2.6	2.7	2.9	3.0	3.0
Spain	1.8	1.6	1.5	1.5	2.0	1.8	1.8	1.7	1.6
Italy	1.3	1.3	1.5	1.4	1.5	1.5	1.5	1.5	1.5
Poland	0.9	0.9	1.0	1.0	1.1	1.1	1.1	1.1	1.2
Rest of EU-27	5.3	5.6	6.3	6.0	6.1	5.4	5.7	5.8	6.0

DEMAND By product



Demand by product for FAME, HVO and HEFA (EU-27, in million tonnes)

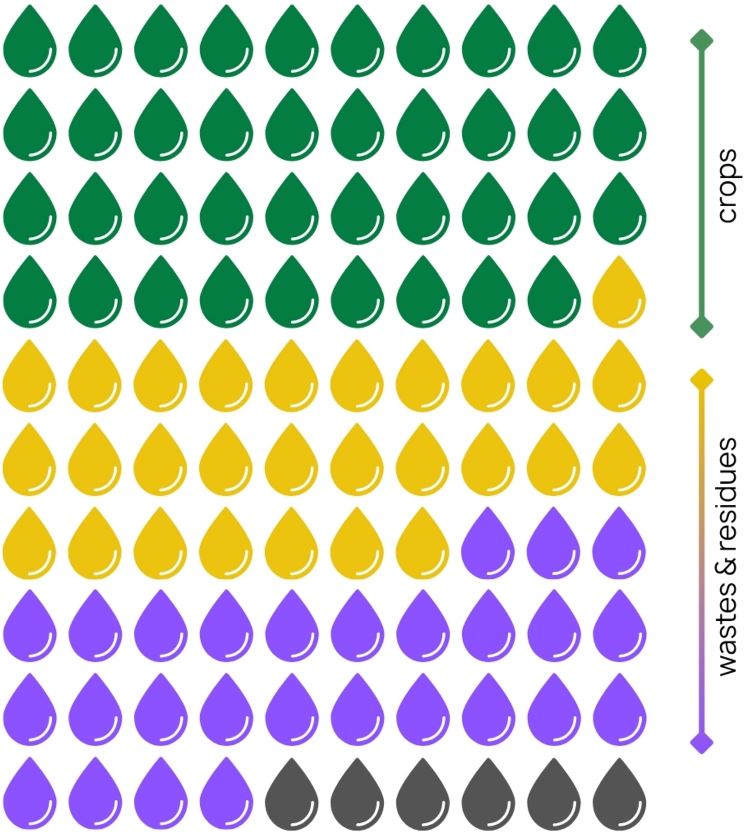
LEGEND

Overall, we see a steady rise in total biofuel demand across the EU, with more noticeable growth post-2022. In that sense, the 2024 figures demonstrate well the past evolution and future projections for the three types of biodiesel. FAME continues to dominate the market, maintaining demand levels between approximately 11.5 and 12.5 Mt, and projected to remain at these levels for the foreseeable future. HVO displays a steady growth trend, increasing gradually from 2019 onwards, and this trend is likely to continue. HEFA, initially absent, begins to appear from 2023 onward and grows steadily. Only used in aviation, we see that it contributes about 1% of total demand for biodiesel, as we are still in the early stages of market uptake.

Product	2019	2020	2021	2022	2023	2024	2025	2026	2027
FAME	12.2	11.3	12.2	11.8	12.4	12.1	12.1	12.0	11.8
HVO	2.6	3.7	3.5	3.4	3.7	3.1	3.2	3.3	3.5
HEFA	0.00	0.01	0.02	0.07	0.08	0.15	0.63	0.77	0.91

FEEDSTOCKS

	CROP-BASED	39%
	ANNEX IX (B)	28%
	ANNEX IX (A)	27%
	UNCATEGORISED	6%



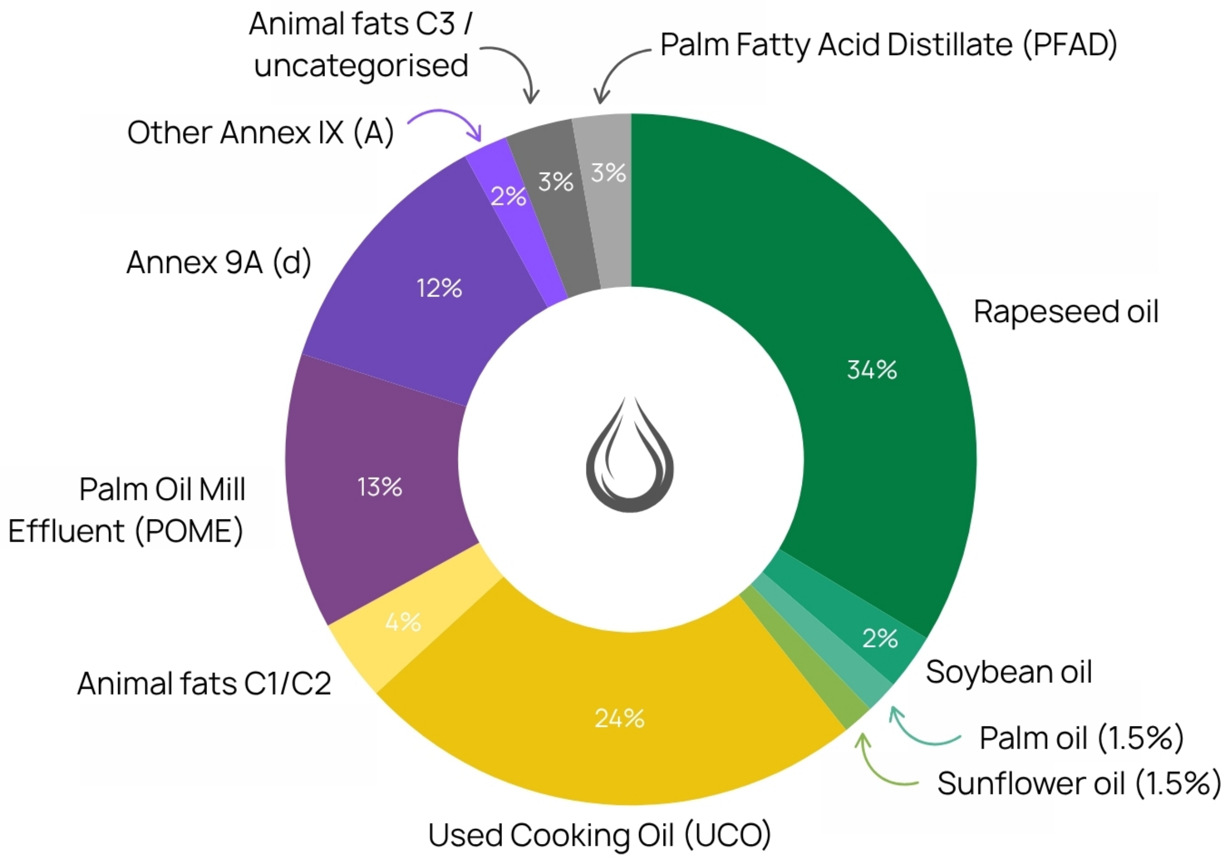
Grouped breakdown of feedstock use for FAME and HVO production (EU-27, percentage)

EU feedstock use by group

Over the period 2019-2024 we see a relative decline in the use of crop-based feedstocks to about 6.5 Mt (39% of EU feedstock use). Relatively speaking, demand for waste-based feedstocks steadily rises, overtaking crop-based around 2022 as the main feedstock. Feedstocks classified as Annex IX (A) and Annex IX (B) nearly evenly split at 4.5 Mt. The feedstocks in “uncategorised” include mostly animal fats C3 and Palm Fatty Acid Distillate (PFAD).

FEEDSTOCKS

EU feedstock use (detail)



Detailed breakdown of feedstock use for FAME and HVO production (EU-27, percentage)

LEGEND

39%	**Crop-based** (green-tones)
28%	**Annex IX (B)** (yellow-tones)
27%	**Annex IX (A)** (purple-tones)
6%	**Uncategorised** (grey-tones)

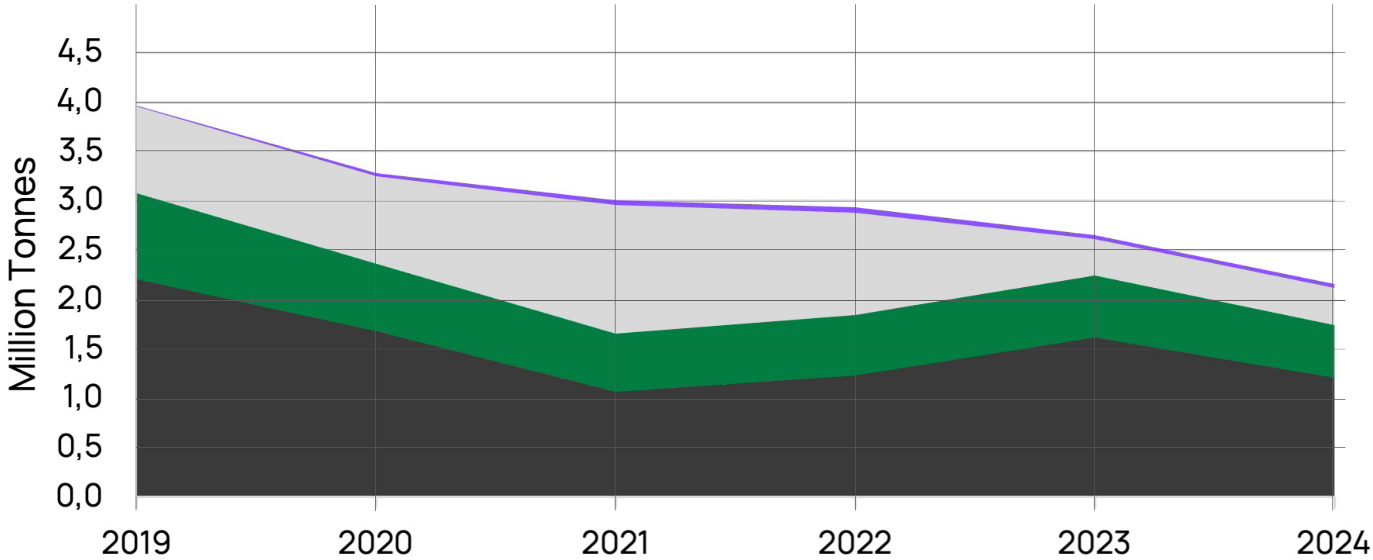
EU feedstock use (detail)

In this detailed overview, the EU production is broken down by feedstock. The colours indicate the feedstock group: Crop-based in green-tones, Annex IX (B) in yellow-tones, Annex IX (A) in purple-tones, and "uncategorised" in grey-tones.

Rapeseed oil dominates at 34%, maintaining its role as the primary crop feedstock. UCO is the largest waste-based contributor at 24%, followed by POME at 13%.

"Other Annex IX (A)" includes: Crude glycerine, Spent Bleaching Earth, technical corn oil, tall oil, manure and sewage sludge. These feedstocks individually represent <1% of the feedstock mix.

TRADE



Imports of FAME into the EU by region of origin
(EU-27, in million tonnes)

LEGEND

- Asia
- Non EU-27
- Latin Amercia
- Rest of the world

EU imports of FAME by region of origin

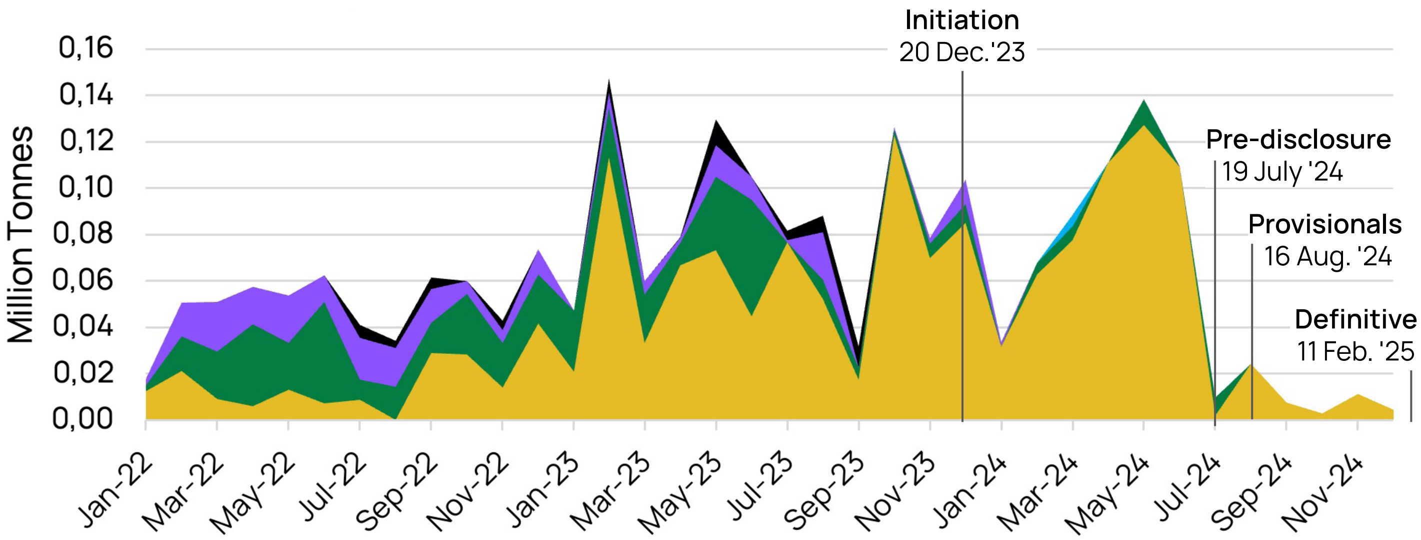
Imports of FAME declined steadily from nearly 4 Mt in 2019 to around 2 Mt in 2024. Asia consistently remains the largest source of FAME imports, although its contribution dropped from over 2 Mt in 2019 to just above 1 Mt by 2024.

The analysis of trade flows is based on publicly available Eurostat data and relies on customs declarations and their corresponding product codes.

As there was no customs code for HVO prior to EBB's interventions to request the creation of one, we only show the development of imports of FAME. For HVO we have a code as of January this year, and will be able to monitor it more closely from now on. For HEFA/SAF we continue to argue for a separate code.

TRADE

EU imports of FAME from China



EU imports of FAME from China, by country in million tonnes - Data: Eurostat.

LEGEND

- Netherlands
- Spain
- France
- Belgium
- Other EU countries

Country	2022	2023	2024
Netherl.	0.19	0.78	0.57
Spain	0.24	0.19	0.03
France	0.0	0.0	0.01
Belgium	0.16	0.07	0.0
Other EU	0.02	0.04	0.0

EU imports of FAME from China

Taking a closer look at imports of FAME from Asia, we see that by far most of the imports into the EU-27 come from China. Following a period of sharply rising import volumes through 2022 and early 2023 – peaking significantly in March and June 2023 – the import data shows a dramatic downturn starting in July 2024. This sharp drop coincides closely with the pre-disclosure (19 July 2024) and provisional measures (16 August 2024) phases of the EU anti-dumping investigation, initiated by EBB.

The Eurostat data on imports of FAME from China are available up to December 2024. Therefore, we are currently unable to show the effects of the Definitive Measures in the anti-dumping case, that came out on 11 February 2025.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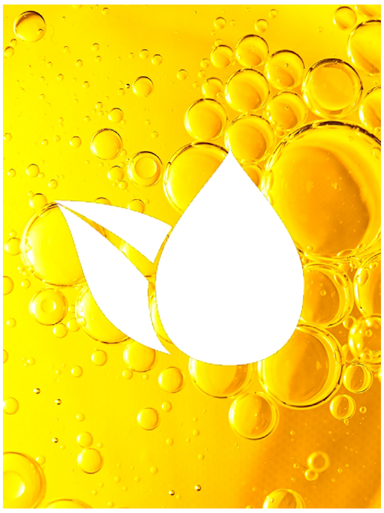
COLOPHON



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Figures are rounded to the closest decimal number. All EBB statistics are subject to a +/- 5% margin of error.

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