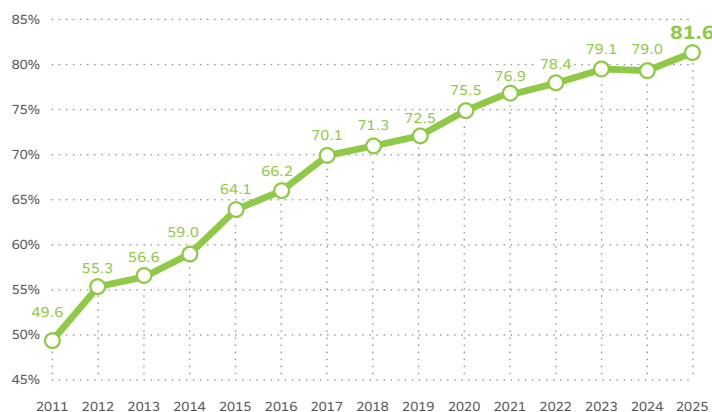


In 2025, ePURE members and other European producers of renewable ethanol produced **5.32 million tonnes (6.7 billion litres) of ethanol** and **6.61 million tonnes of food and feed co-products, including high-protein animal feed** – in other words, **more food than fuel**. Nearly all of the crops used were **grown by European farmers**. 82.5% of the ethanol produced was for fuel use, with an average of **81.6% GHG savings compared to fossil fuels**.

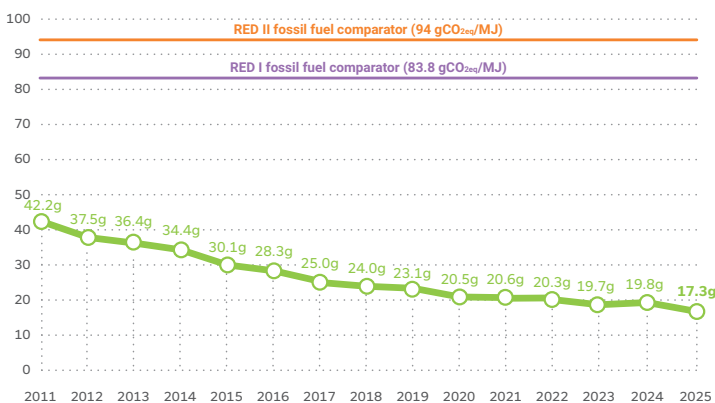
Average certified GHG emission savings in %

The average certified greenhouse gas emission savings of renewable ethanol against fossil fuels have increased from 49.6% in 2011 to 81.6% in 2025.



Source: Aggregated and audited data of ePURE members and other European producers for volumes certified under RED I or RED II methodology.

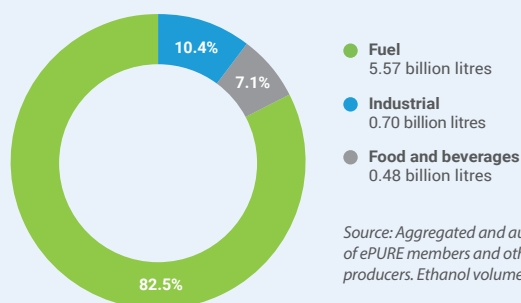
Average certified GHG emissions from the production and use of fuel ethanol in gCO₂eq/MJ



Source: Aggregated and audited data of ePURE members and other European producers for volumes certified under RED I or RED II methodology.

Renewable ethanol production by end-use

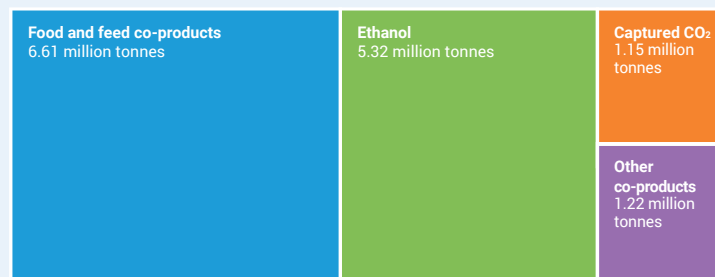
In 2025, ePURE members and other European producers of renewable ethanol produced 6.75 billion litres of ethanol, operating at 86.4% of their 7.81 billion litres of installed capacity. Fuel accounted for 82.5% of the use; other markets, such as industrial applications and beverages & food, represented 10.4% and 7.1% respectively.



Source: Aggregated and audited data of ePURE members and other European producers. Ethanol volumes in pure alcohol.

Main output of European renewable ethanol plants

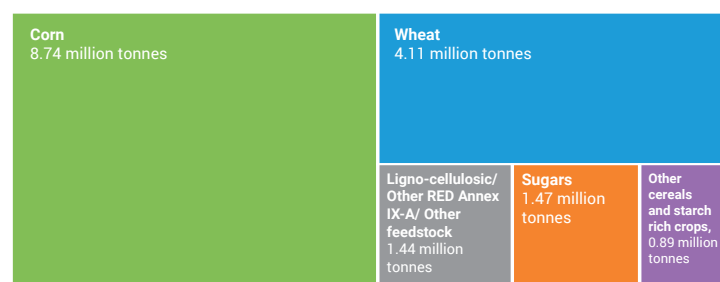
In 2025, ePURE members and other European producers of renewable ethanol produced more food and feed co-products than ethanol: of the 9.62 million tonnes of co-products produced by biorefineries, 6.92 million tonnes were food and feed co-products.



Source: Aggregated and audited data of ePURE members and other European producers. Ethanol – pure alcohol; Food and feed co-products – commercial product equivalent; Other co-products – commercial equivalent.

Feedstock used to produce renewable ethanol

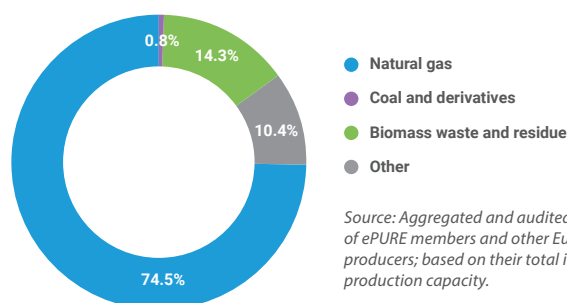
Nearly all the feedstock used to produce renewable ethanol by ePURE members and other European producers was grown in Europe. Of the 6.75 billion litres of ethanol produced in 2025, 50.3% was from corn, 20.4% from wheat, 13.3% from sugars, 5.1% from other cereals and starch-rich crops, and 11.1% from ligno-cellulosic, other RED Annex IX-A and other feedstocks.



Source: Aggregated and audited data of ePURE members and other European producers. Sugars – sugar equivalent; Ligno-cellulosic/Other RED Annex IX-A/Others – dry matter equivalent.

Share of installed production capacity per type of process fuels

ePURE members and other European producers are improving production processes for renewable ethanol. In 2025, nearly 55% of the installed production capacity of the European bioethanol industry was equipped with a CO₂ capture system, and nearly 59% had integrated cogeneration of heat and power (CHP) to reduce their energy demand.

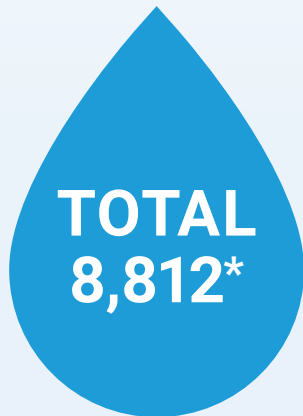


Source: Aggregated and audited data of ePURE members and other European producers; based on their total installed production capacity.



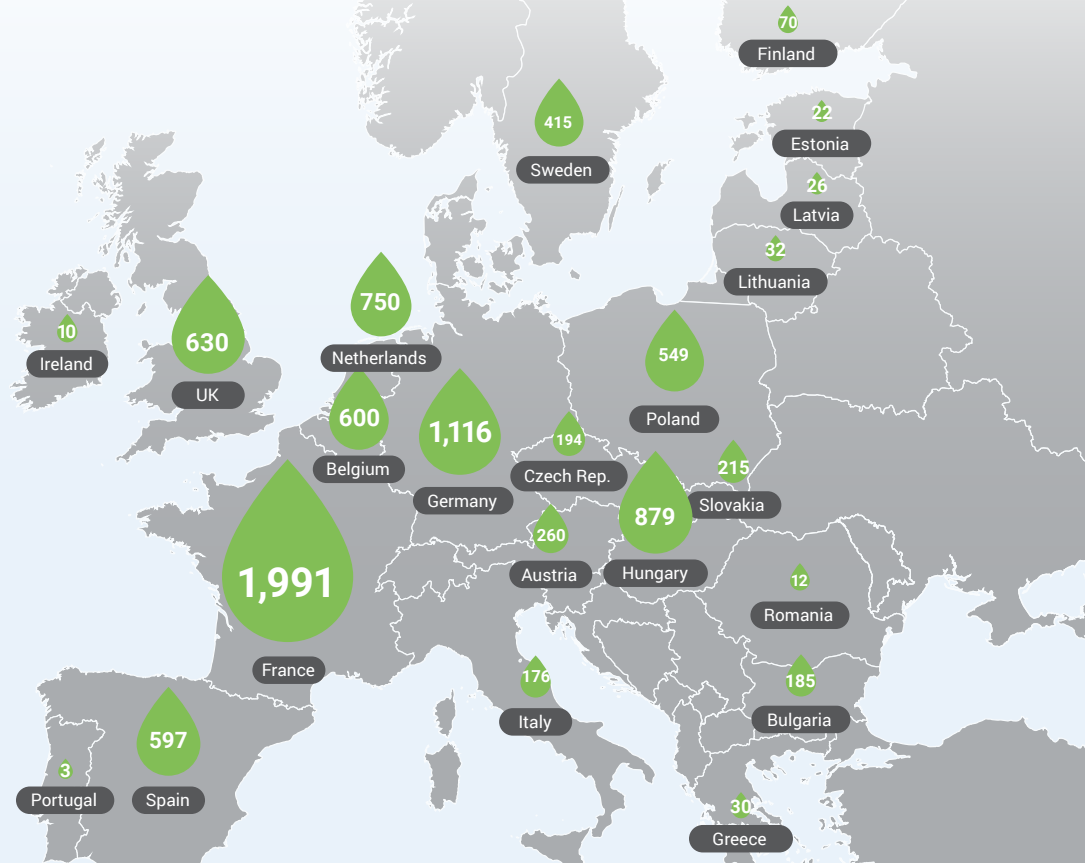
Renewable ethanol market at a glance – 2025

EU27 + UK renewable ethanol installed production capacity (Million litres)



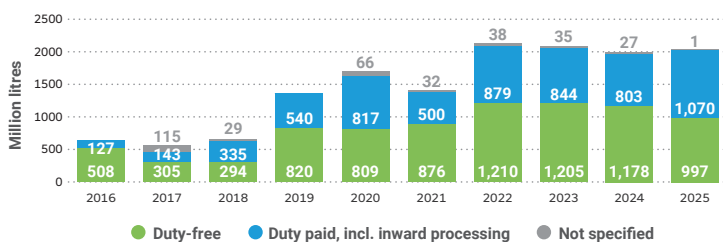
*Includes non-ePURE members.

Source: ePURE estimates for ethanol fermentation capacity based on ePURE members and F.O. Licht.



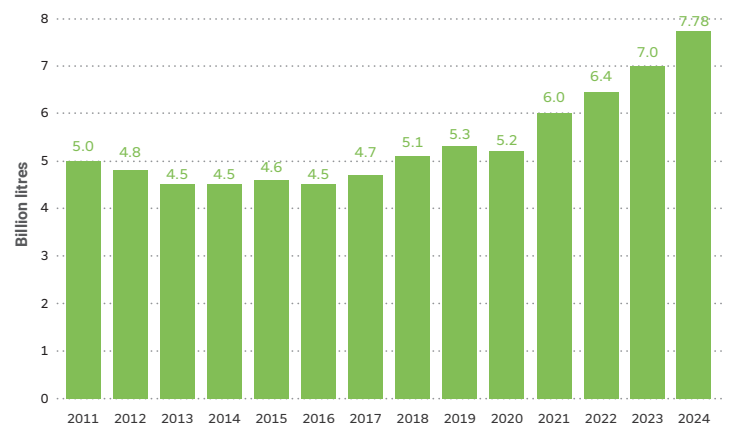
Imports of ethanol into the EU27

EU ethanol imports remained high at 2,068 million litres in 2025, registering an increase of 3% compared to 2024, reminding that in 2022 imports spiked by 51% as compared to 2021. Imports from countries enjoying duty-free access decreased to 48% (down from 59% in 2024), notably due to a partial GSP+ removal of non-fuel imports from Pakistan in H2 2025 as well as a lower import rate from the UK, which registered a decrease by 48% from 282 MI in 2024 to 151 MI in 2025. Pakistan remains the largest duty-free importer with 148 MI imported duty-free (fuel and non-fuel in H1 2025). Imports subject to duties including inward processing, represented 52% of total imports, these include imports from the US which increased by 48% in 2025 as compared to 2024, reaching 851 MI and marking the US top EU importer in 2025. Imports from Brazil continued to decrease reaching 121 million litres in 2025.



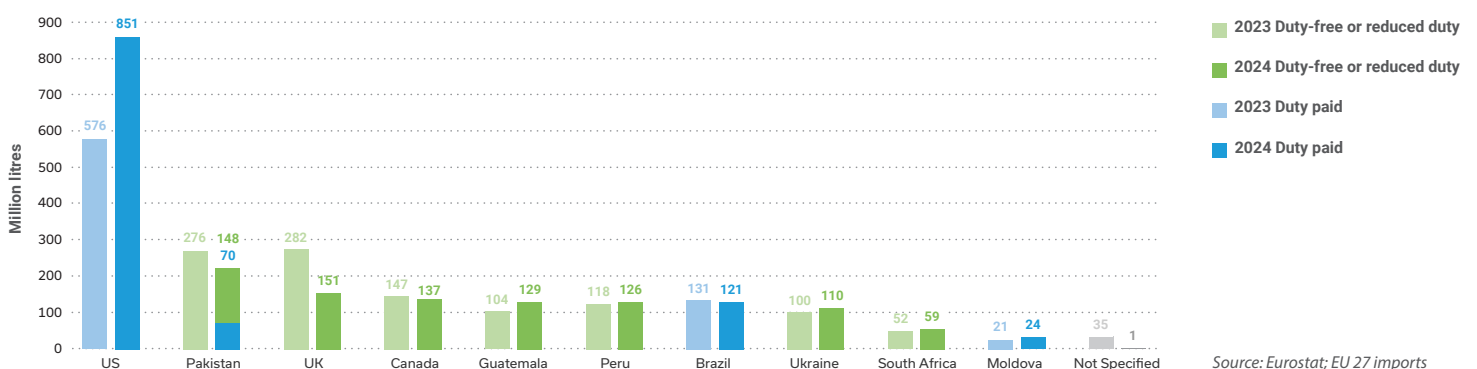
Source: Eurostat EU28 imports until 2019, EU27 imports without the UK as of 2020

EU27 biogasoline consumption



Source: Eurostat
Biogasoline: liquid biofuels suitable to be blended with or to replace motor gasoline from fossil origin e.g. ethanol, methanol and the share of ETBE and MTBE from biomass.

Top 10 origins of EU ethanol imports



Source: Eurostat; EU 27 imports