Europe Advanced Biofuel - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 110 pages | Mordor Intelligence

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Report description:

The Europe Advanced Biofuel Market is expected to register a CAGR of greater than 4% during the forecast period.

The market was negatively impacted by COVID-19 in 2020. Presently, the market has reached pre-pandemic levels.

Key Highlights
- Over the long term, the ease in the availability of raw materials and their use being non-food and wastes, along with governmental incentives supporting the development of technologies for producing advanced biofuels, are expected to drive the market during the forecast period.
- On the flip side, the high cost of production of advanced biofuels, even with all the associated benefits, is likely to restrain the market's growth.
- Nevertheless, countries such as Germany, the United Kingdom, the Netherlands, and Sweden are encouraging biodiesel blending to obtain pure biodiesel, which can be used as a fuel source in diesel engines. This will likely provide ample opportunities for the biofuel market in the future.
- Germany is expected to dominate the advanced biofuel market in Europe during the forecast period.

Europe Advanced Biofuel Market Trends

Biodiesel Fuel Type to Witness Significant Growth

- Biodiesel is a renewable fuel produced from vegetable oils, such as rapeseed oil, sunflower seed oil, and soybean oil, and used cooking oils or animal fats. Biodiesel has been demonstrated to have significant environmental benefits in terms of decreased global warming impacts, reduced emissions, greater energy independence, and a positive impact on agriculture.
- Biodiesel is used in diesel engine-based cars, trucks, buses, and other vehicles and in stationary heat and power applications. Most biodiesel is made by chemically treating vegetable oils and fats (such as palm, soy, and canola oils, and some animal fats) to produce fatty acid methyl esters (FAME).
- According to the United States Department of Agriculture, biodiesel and a mixture of biodiesel in fossil fuels help to reduce carbon dioxide emissions, especially in the transport sector. The European Commission plans to revise the Renewable Energy Directive, which is expected to increase renewable energy targets in the transport sector.
- The European region witnessed significant growth in biodiesel consumption in recent years, with a rising concern regarding climate change and a need for clean transportation fuel. For instance, according to the Digest on the United Kingdom Energy Statistics, biodiesel consumption in the transport sector increased rapidly from 559 liters in 2015 to about 1,238 liters in 2021.
- This, in turn, is increasing the demand for new biodiesel production facilities to meet the growing regional demand. For instance, in June 2022, Cargill completed its first advanced biodiesel plant in Ghent, Belgium, which converts waste oils and residues into renewable fuel. The advanced biodiesel produced at the facility will be used by the maritime and trucking sectors, enabling customers to lower the carbon footprint associated with their marine and road transport activities.
- Therefore, based on the aforementioned factors, biodiesel fuel type is expected to witness significant growth in Europe's advanced biofuel market during the forecast period.

Germany to Dominate the Market

- Germany is one of the largest producers of biofuel in the world. The country encourages biofuel usage in road transportation to reduce greenhouse gas emissions.
- According to the BP Statistical Review of World Energy 2022, Germany produced 121.2 petajoules of biofuel, equivalent to 3.1% of the world's biofuel production. Germany is one of the largest biodiesel producers in the European Union. According to the United States Department of Agriculture (USFDA), in 2020, Germany produced approximately 3,542 million liters of biodiesel, witnessing an increase of roughly 14.33% compared to 3,106 million liters of biodiesel in 2012.
- In 2018, the European Union adopted the Renewable Energy Directive II (RED II) for the period 2021-2030, which indicated to set a new overall renewable energy target of 32% by 2030 and a 14% target for the transport sector. Furthermore, the European Union has set some minimum biofuel use to achieve the Renewable Energy Directive II. Thus, in accordance with the RED II initiative, the German Government has set a blending target of 0.5% for advanced biofuels by 2025 to foster renewable fuels for transport purposes. Furthermore, Germany has also set a target to reduce GHG emissions by 6% in the transport sector by 2025. Thus, such government initiatives are likely to support the market for advanced biodiesel in Germany during the forecast period.
- Palm oil was used as the primary feedstock in Germany till 2019. However, indirect land use change impacts of biofuels (ILUC) delegated act limits palm oil (the only 'high ILUC risk' feedstock) launched in 2019 limits the use of palm oil in the production of biodiesel till 2023 and then would phase out the use of palm oil entirely by 2030. Germany has set a target of phasing out palm oil by 2023 and helping in reducing GHG emissions.
- Furthermore, in July 2022, DHL Global Forwarding, the air and ocean freight specialist of Germany's Deutsche Post DHL Group, signed an agreement with compatriot liner shipping company Hapag-Lloyd for the use of advanced biofuels. As an initial step, Hapag-Lloyd will ship 18,000 TEU of DHL's volume using advanced biofuels, equivalent to a reduction of 14,000 tons of Well-to-Wake CO_2 emissions. The two companies share the vision of decarbonizing container shipping and logistics. Such agreements are likely to create positive demand for the advanced biofuels market in Germany during the forecast period.
- Therefore, based on the above factors, Germany is expected to dominate Europe's advanced biofuel market during the forecast period.

Europe Advanced Biofuel Industry Overview

The Europe advanced biofuel market is consolidated in nature. Some of the major players in the market (in no particular order) include Abengoa Bioenergy, Chemtex Group, Clariant Produkte GmbH, Greenergy International Ltd, and Envien Group.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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