

Meeting of the EU Crop Markets Observatory  
April 3<sup>rd</sup> 2019

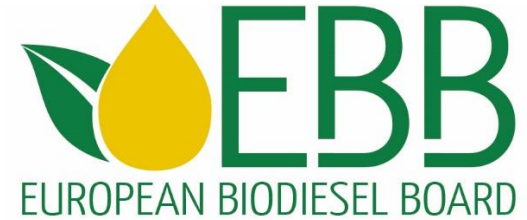
## *The European Biodiesel Sector*

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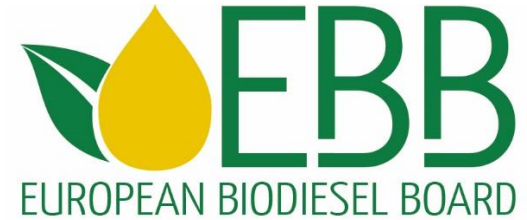
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# The European Biodiesel Board

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- The European Biodiesel Board (EBB) represents 75 members from 21 European Member States accounting for nearly 80% of EU biodiesel production and nearly two thirds of the biodiesel produced worldwide.
- Deeply committed to offer a green alternative to fossil fuels in transport, EBB constantly works towards the reduction of EU energy dependency, the creation of green jobs and the protection of environment.
- EBB represents its members to the institutions of the European Union and in other international organizations
- We are constantly committed in the promotion of scientific, technological, legal and research activities.
- Our aim is to bring effective solutions to the biodiesel industry from different perspectives (economic, political, legal, institutional and technical)



# EBB members & associate members



# Consumption of renewables in Europe

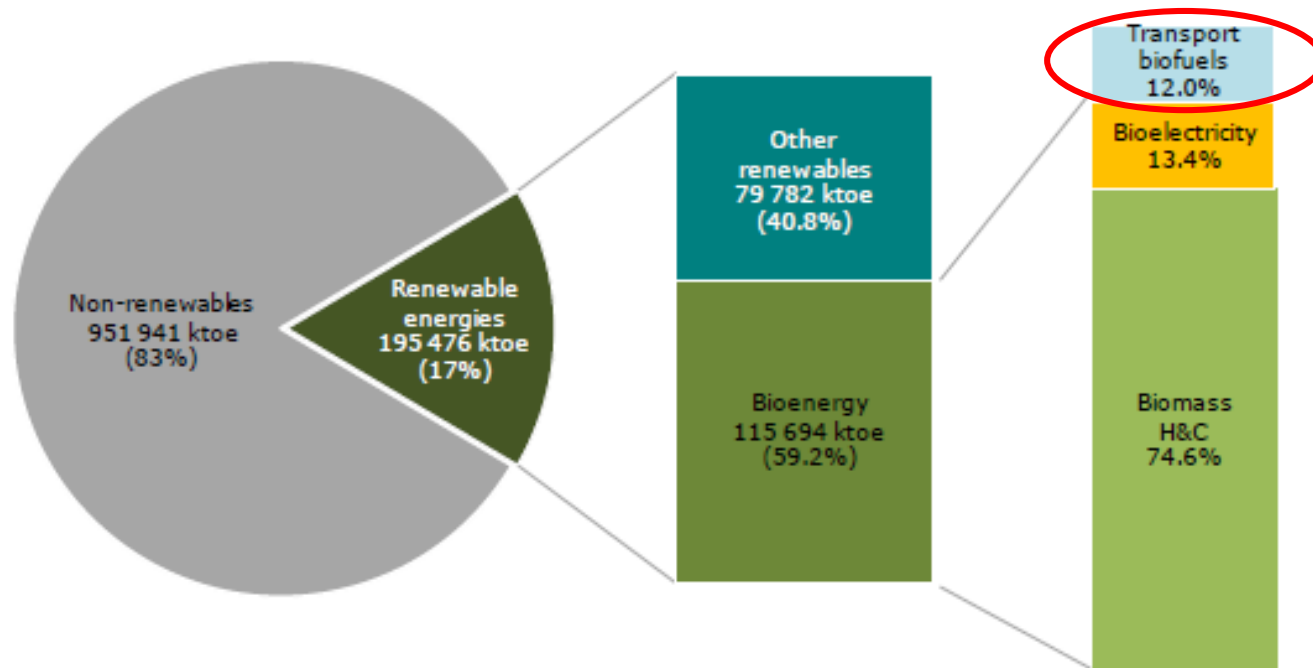


Figure 1. Share of renewables in the EU's gross final energy consumption for 2016 and breakdown of the bioenergy contribution. Source: [Eurostat 2018b](#) and [NREAP Progress Reports](#).

# Consumption of renewables in Europe

## - Gross final bioenergy consumption in 2016

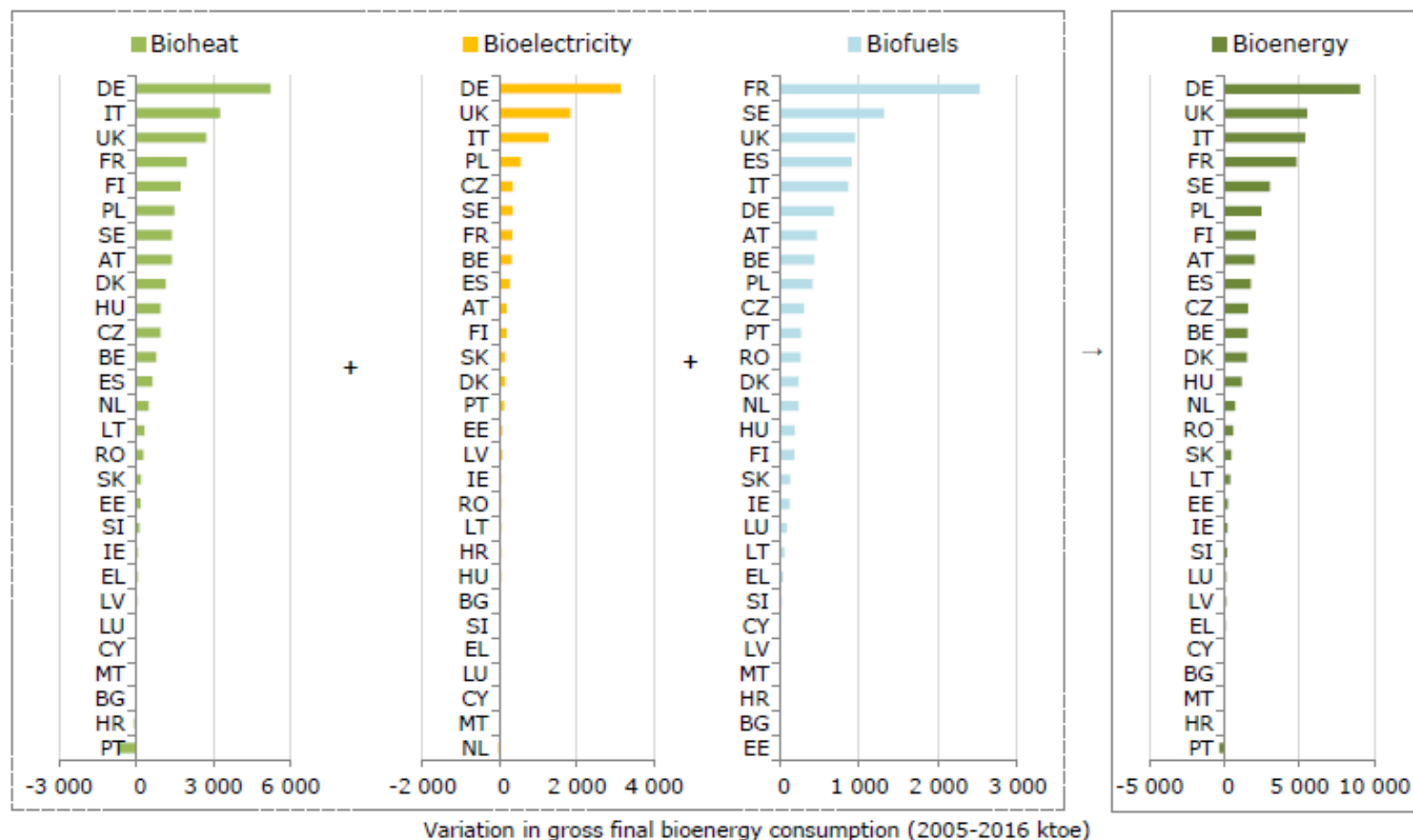
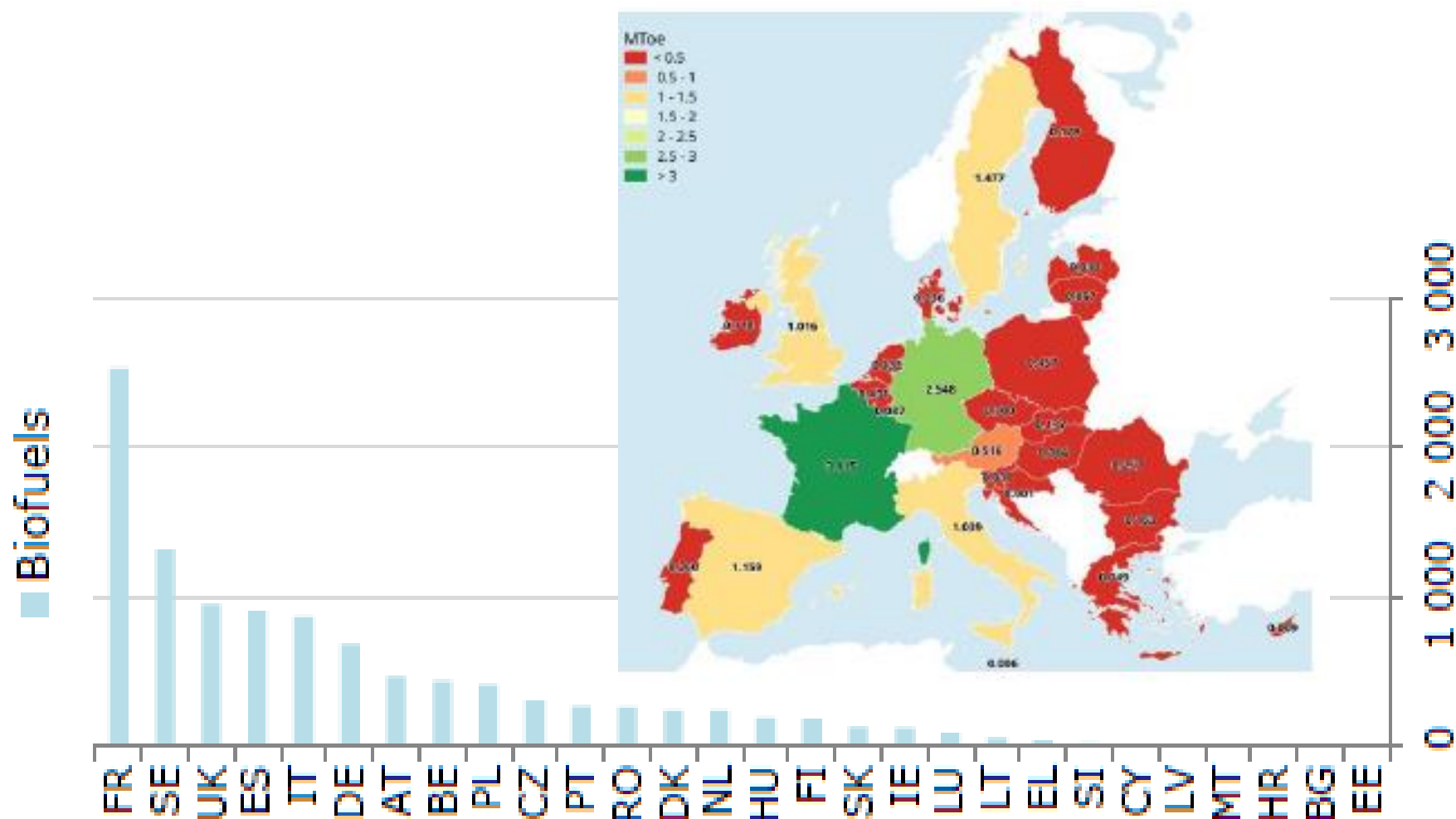


Figure 5. Variation in gross final bioenergy consumption (ktOE)<sup>4</sup> in EU Member States between 2005 and 2016. Source: [Eurostat 2018a](#) and [NREAP Progress Reports](#). Note: Biofuels data includes only those biofuels that are compliant with sustainability criteria, as provided by the Renewable Energy Directive<sup>7</sup>.

# Consumption of renewables in Europe

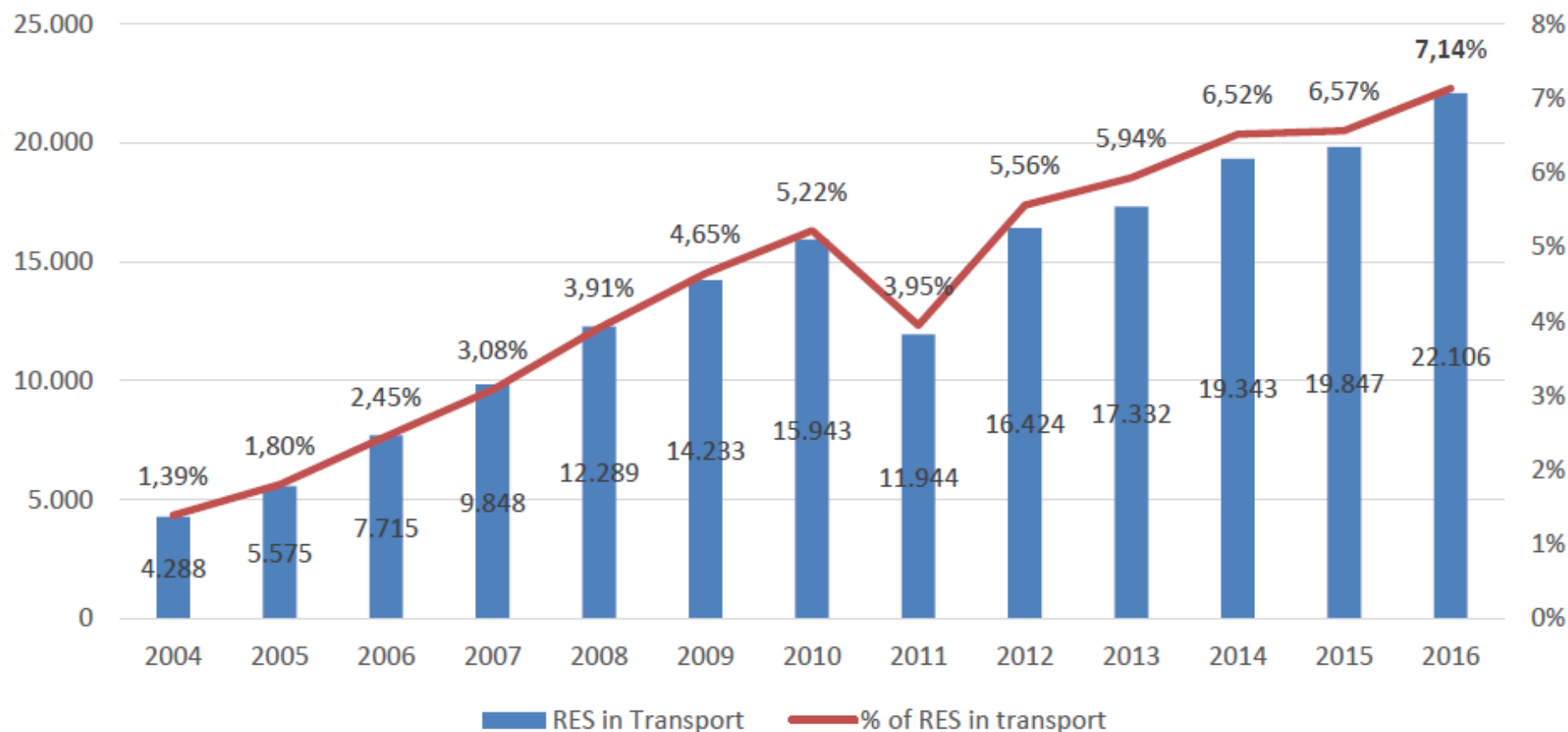
## - Gross final biofuels consumption in 2016



# Consumption of renewables in Europe

## - Renewables share in transport

Figure 6.2 Evolution of renewable energy consumption in the transport sector\* in EU28 (ktoe and %)



\*Multipliers applied

Source: Eurostat, SHARE 2016



# The European biodiesel industry

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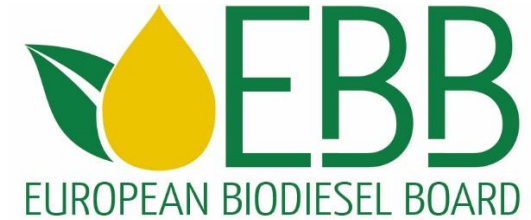


With around 80% of the market share, biodiesel is the most widely used biofuel in Europe, with more than 11 million tonnes of biodiesel blended into the European transport energy mix. These include around 3 million tonnes of waste-based biodiesel, reinforcing the industry's efforts to use different raw materials and contribute to the circular economy.

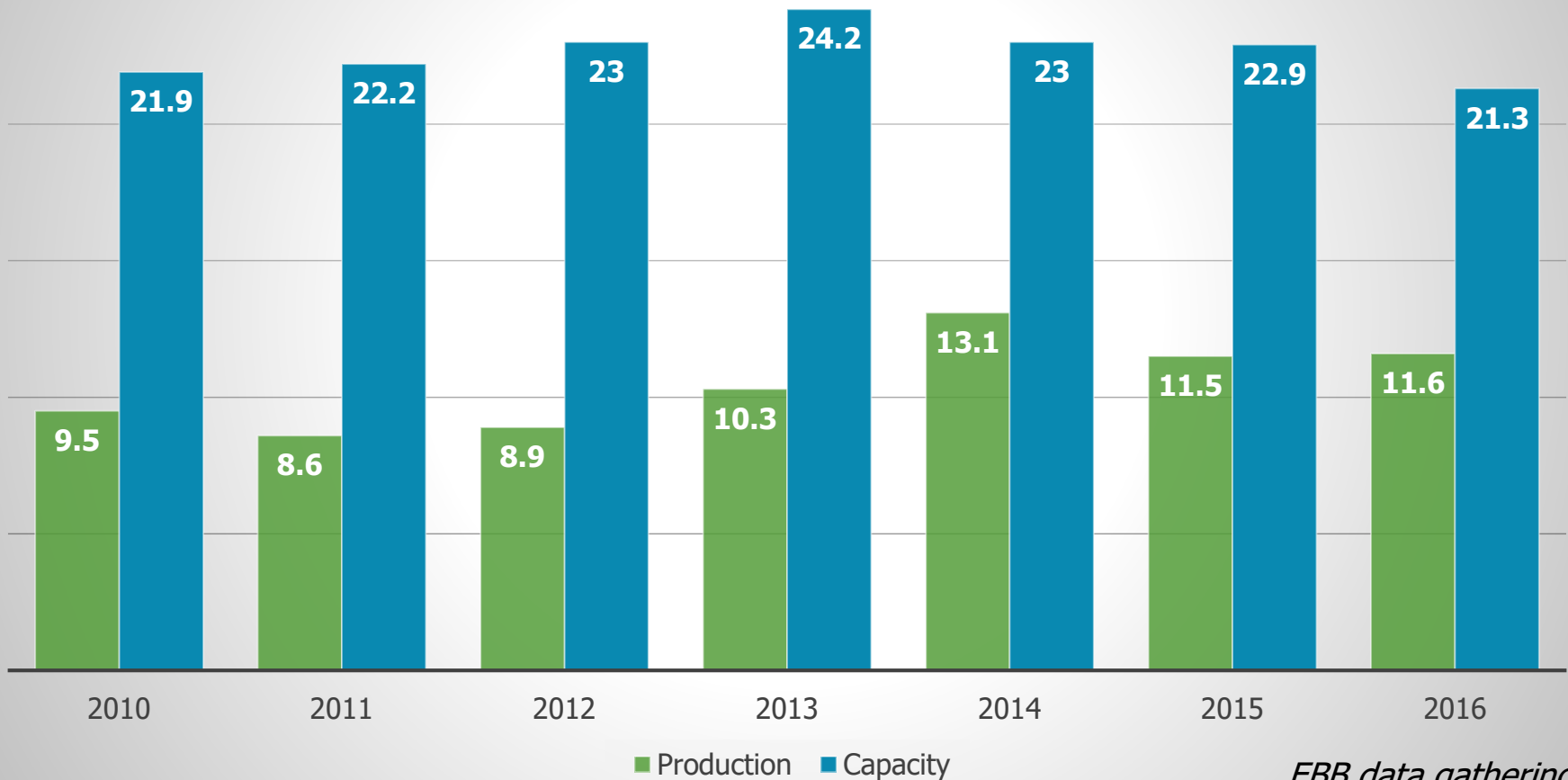
This sustainable biodiesel delivers significant GHG emissions savings, mitigates the need for the EU to import additional animal feed and avoids the need to import even more fossil fuels from third countries.

# The European biodiesel industry

## Production & Capacity



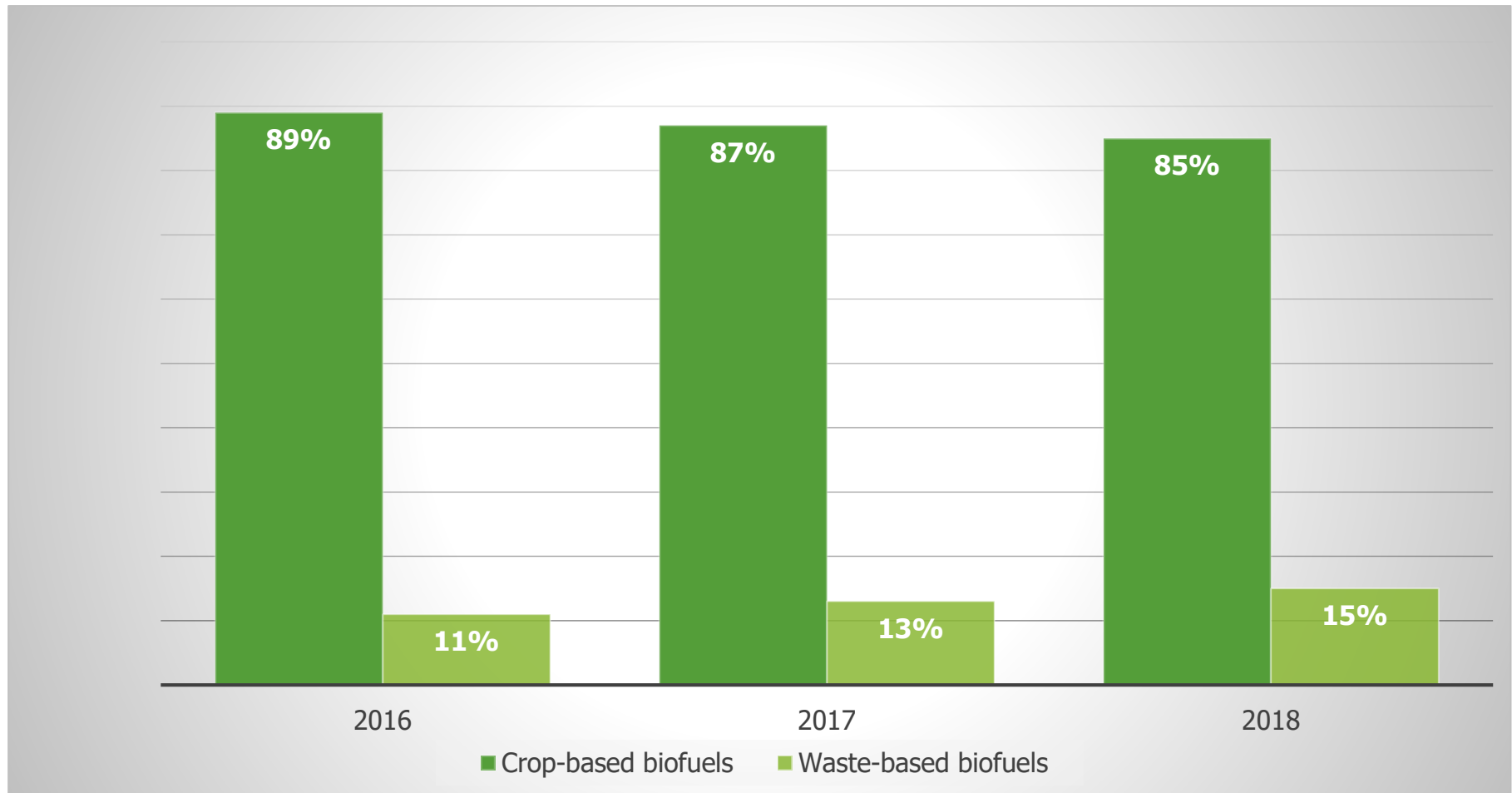
*In million tonnes*



*EBB data gathering*

# The European biodiesel industry

## Biodiesel produced in the EU (2016-2017-2018)

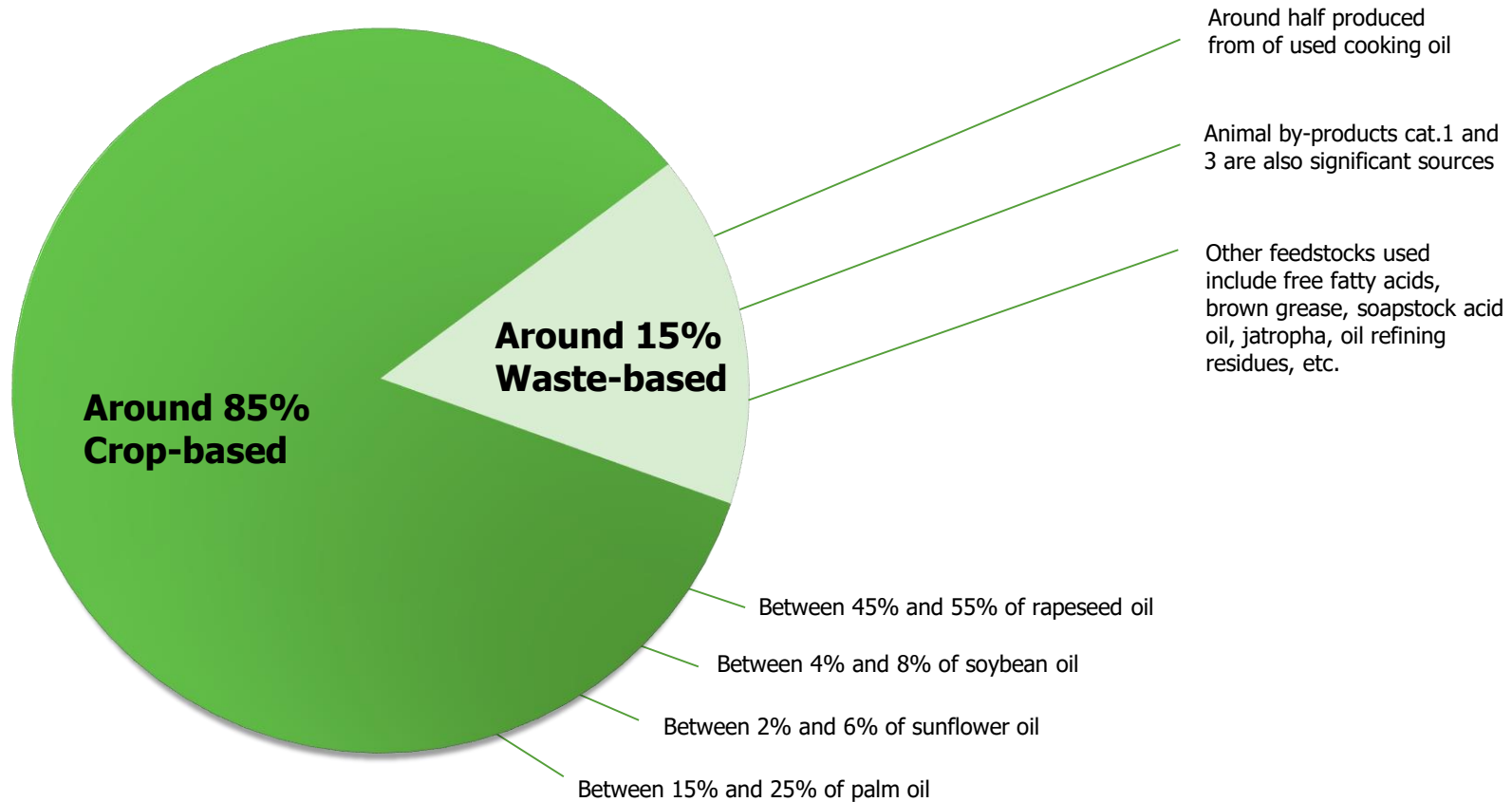


roduced in the EU  
-2018

*EBB data gathering exercise - estimations*

# The European biodiesel industry

Biodiesel produced in the EU - feedstocks



*EBB data gathering exercise - estimations*

# The European biodiesel market



The **price of biodiesel** falls in between two unrelated variables:

- **Diesel oil price**

- **Vegetable oil price**, different accordingly with the feedstock used (i.e. soy, rape, palm, etc.)

With a high oil price and a low vegetable oil price the margin increases for biodiesel.

## BIODIESEL QUOTES

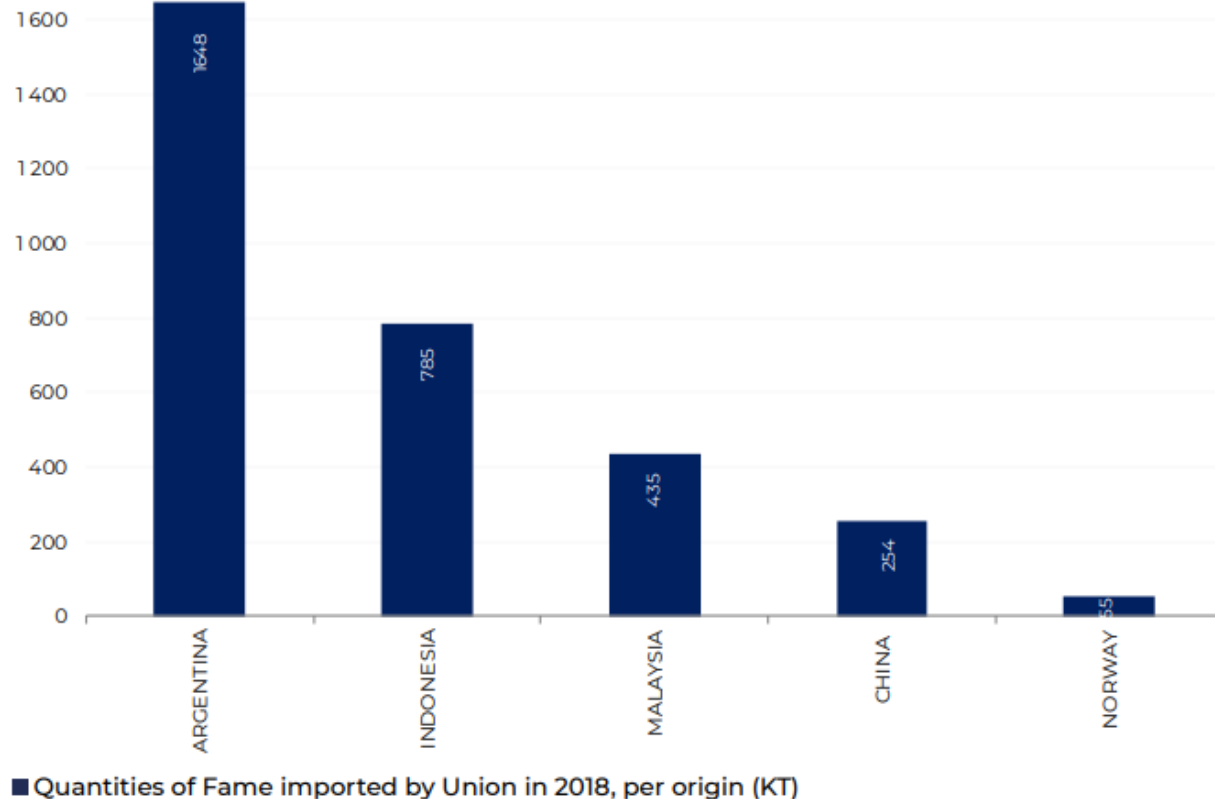
PREMIUMS	USD/MT	(Δ)	INCENTIVES	USD/MT
FAME 0° vs ICE Gasoil	210	5	DC UCOME vs FAME 0°	70
RME vs ICE Gasoil	265	-20	Germany high GHG	-35
UCOME EU vs ICE Gasoil	350	0	Italy premium DC	60



# Imports of biodiesel

## Top 5 suppliers of Fame to the EU

Eurostat final figures for 2018 confirmed the dominance of Argentina as the first biodiesel suppliers to the EU. The SME industry delivered about 50% of the 3.32 million mt received last year, a performance that will not be duplicated in 2019 as the quota will limit the supply to 1.2 million mt max. PME suppliers together shipped a solid 1.22 million mt to the EU.



# Thank you for your attention

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