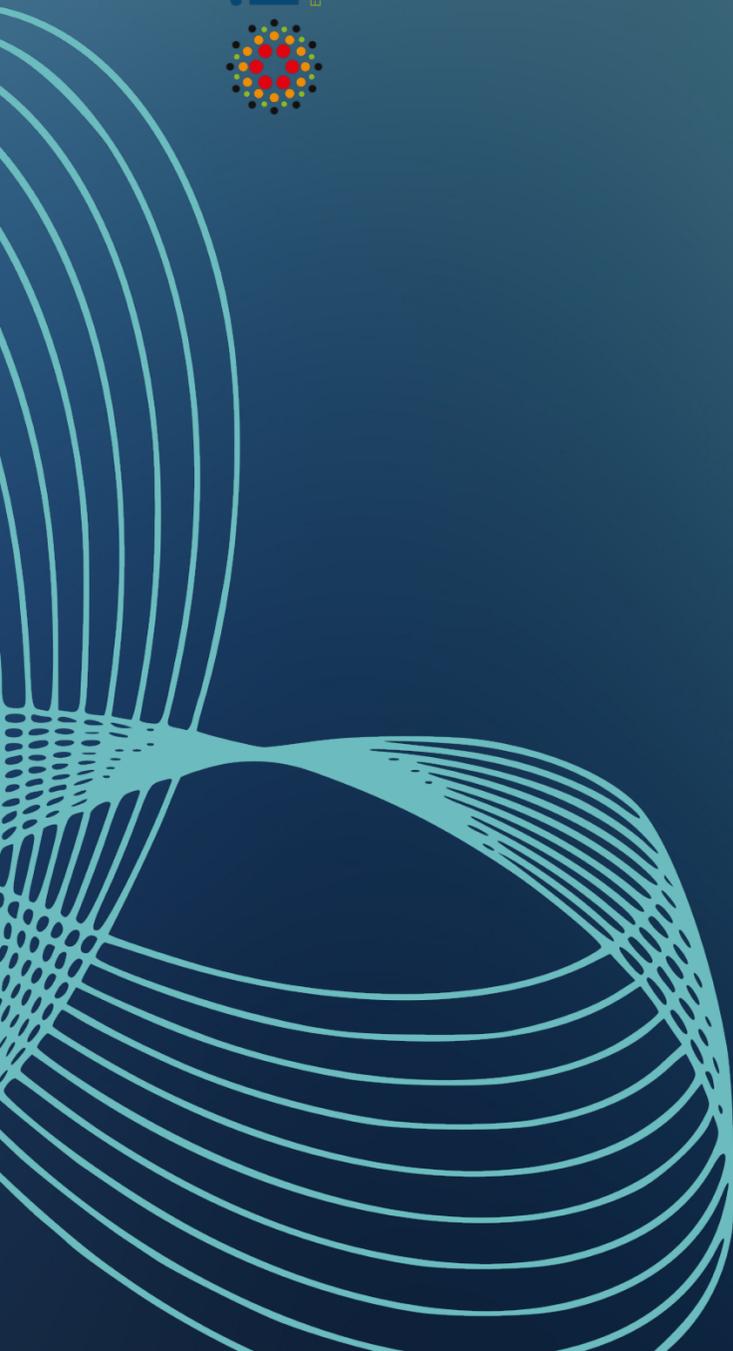


# EU non-fuel ethanol market

**iEthanol, European Industrial & Beverage Ethanol Association**



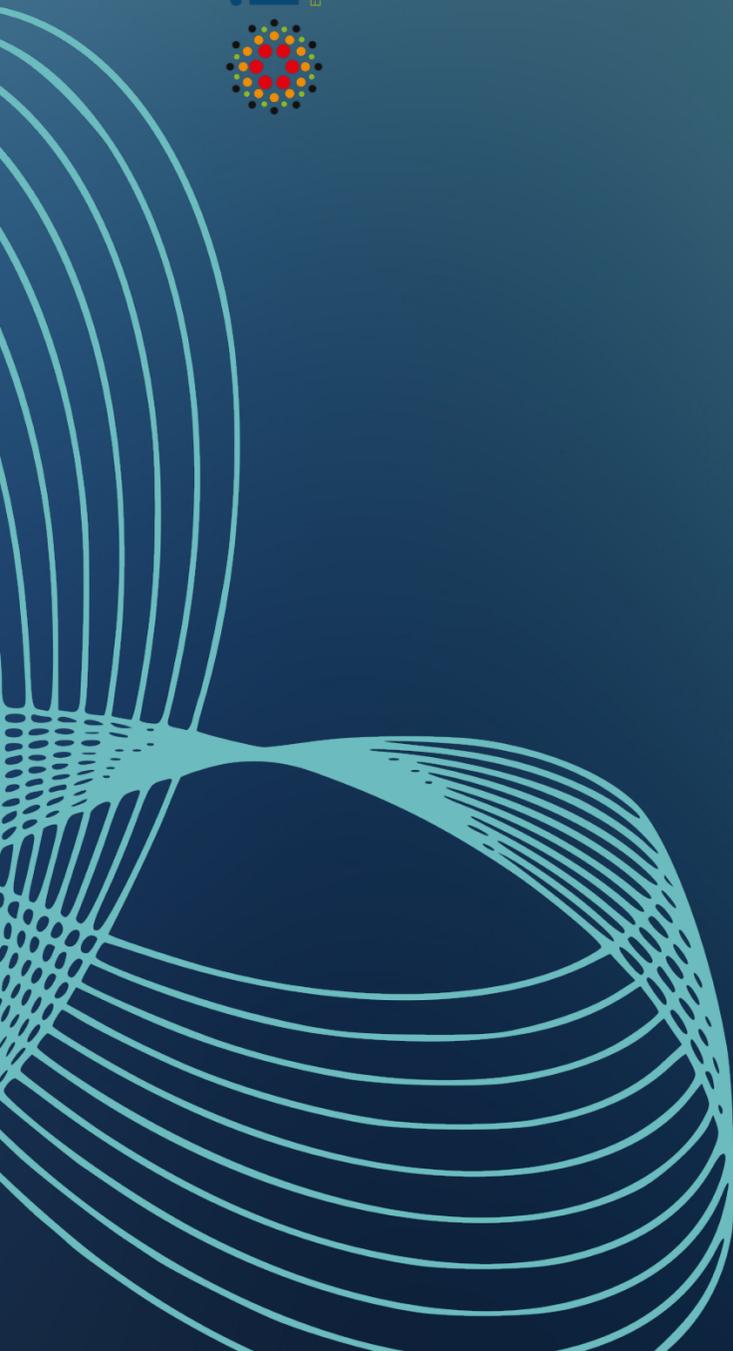
WHO ARE WE?



# ABOUT US

- iEthanol, the European Industrial and Beverage Ethanol Association, is a Brussels-based trade association created in 2008 and representing the majority of the non-fuel ethanol producers in Europe. Our members produce ethanol for industrial and beverage uses, ethanol being produced by fermentation or by catalytic hydration of ethylene.
- To date, the Association is composed of companies, many of whom are SMEs, that cover over 60% of the non-fuel ethanol industry, adding value to local and regional communities in terms of employment, investment and long-term vision.

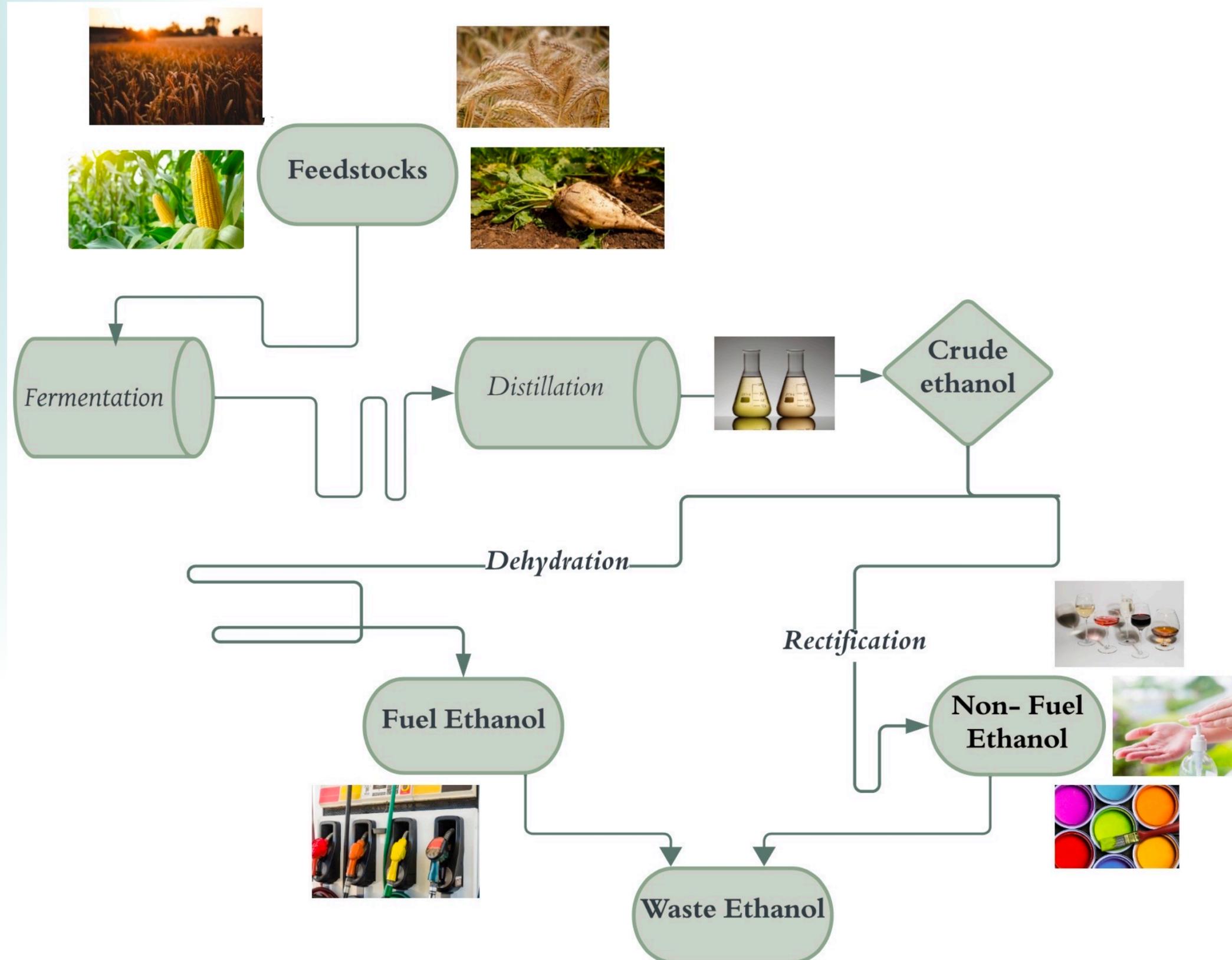




# EU ETHANOL MARKET



# Ethanol production process



# Market usages of non-fuel ethanol



## Industrial & Beverage



**Pharmaceutical  
manufacture**



**Hand sanitizers  
& surface disinfectants**



**Perfumes**



**Spirits**



**Paints  
& coatings**



**Screen-wash & deicers  
for the automotive  
industry**



**Cosmetic  
& toiletries**



**Detergent  
& cleaning products**



**Printing inks**



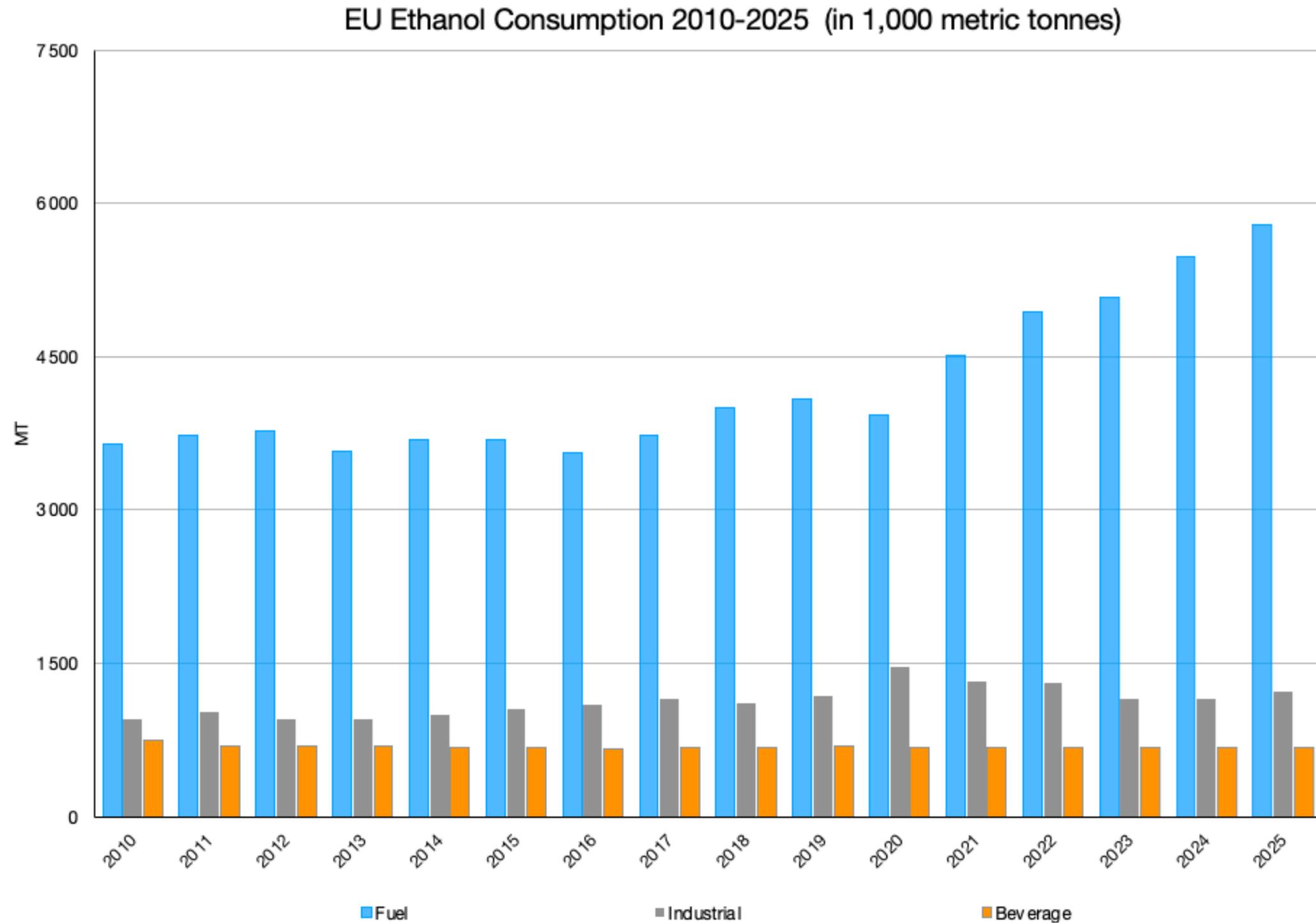
**Production of important  
chemical intermediates  
such as for polymers  
and plastics**



**Vinegar  
& flavors manufacture**

# EU ethanol consumption: Fuel & Non-Fuel

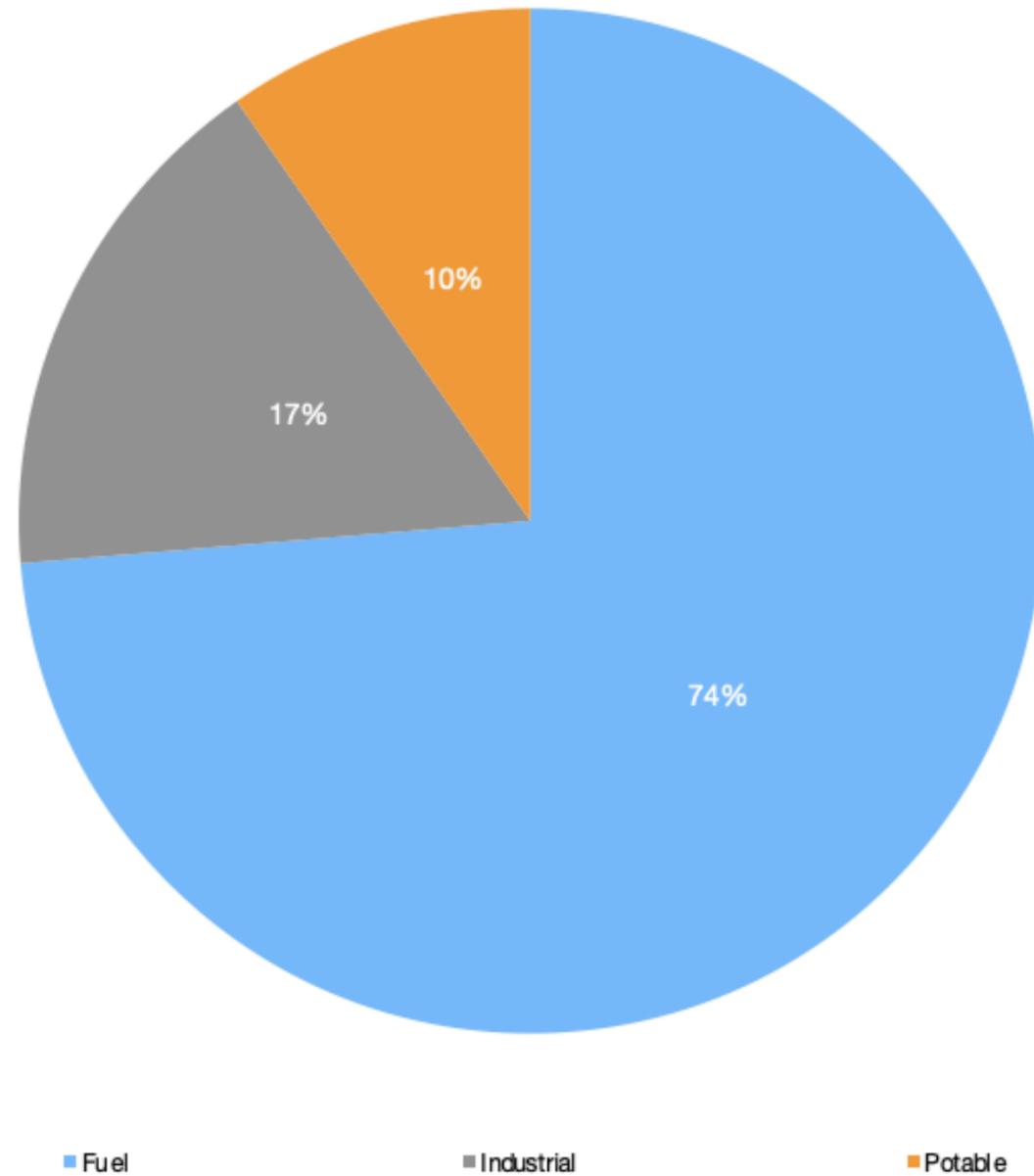
- Fuel 74%
- Non-Fuel 26%
- Industrial 65%
- Beverage 35%



07

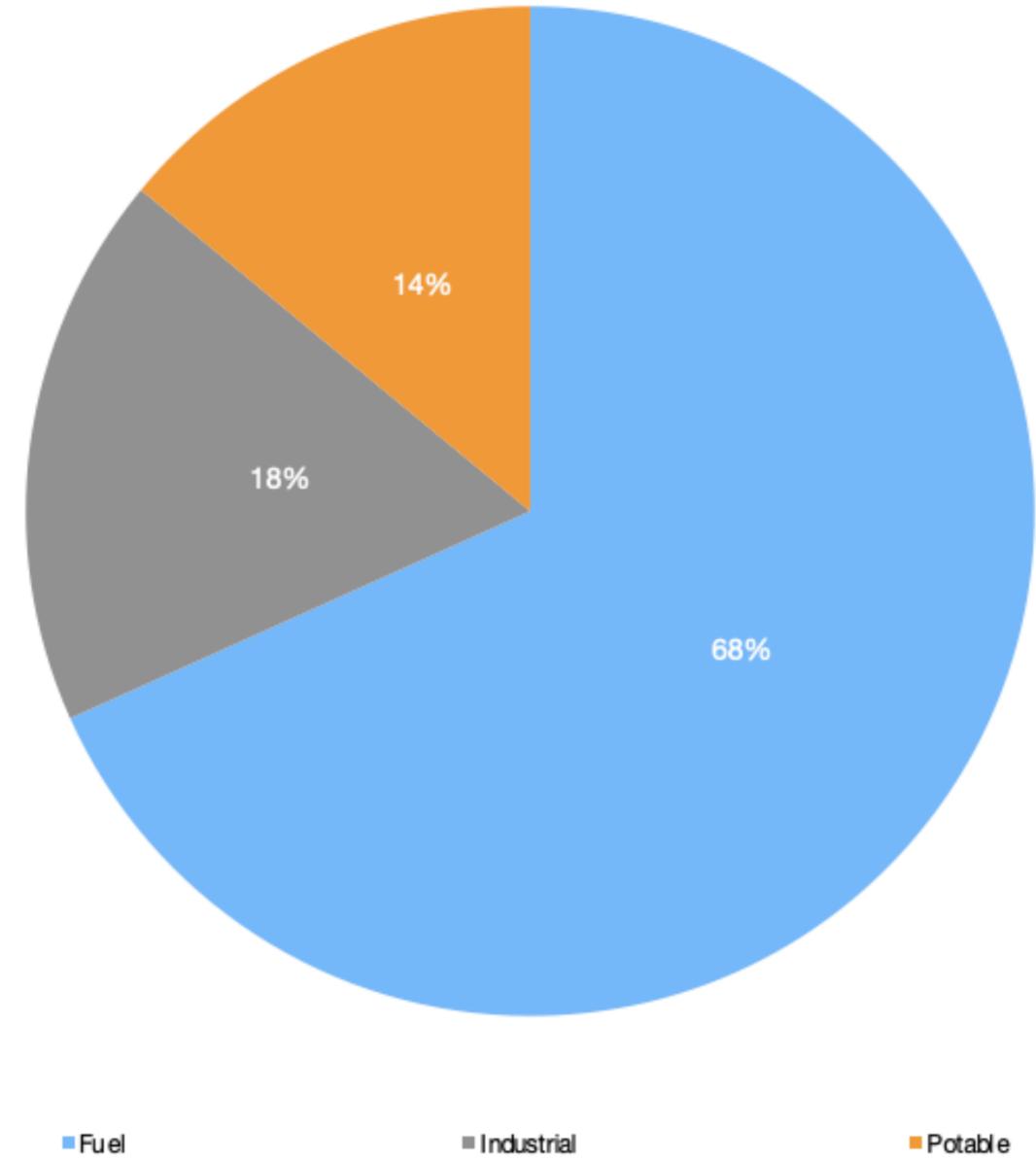
# EU ethanol consumption: 2023 vs 2010

EU Ethanol Consumption 2023 (total 6,900 MT\*1,000)



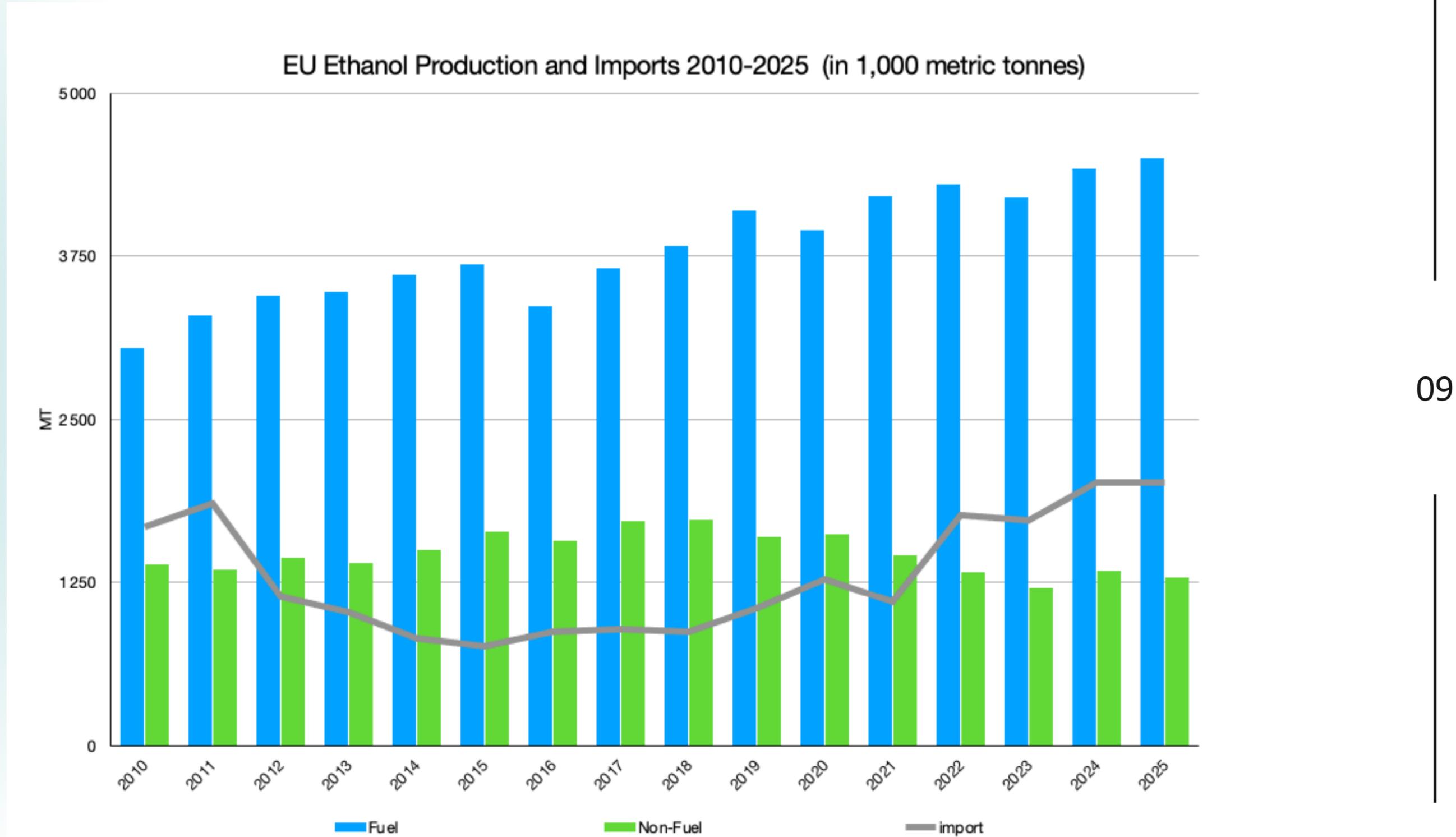
VS

EU Ethanol Consumption 2010 (total 5,348 MT\*1,000)

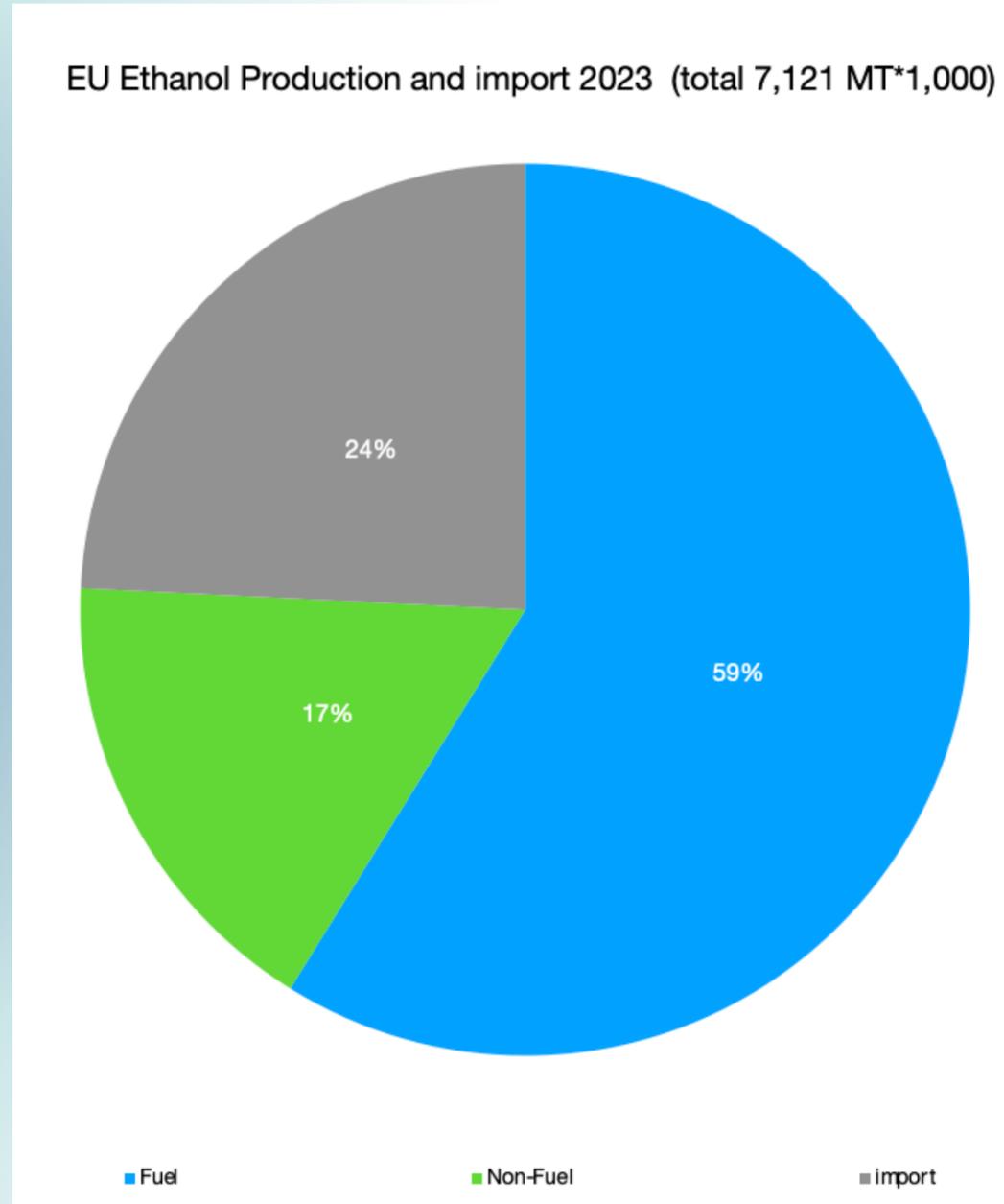


08

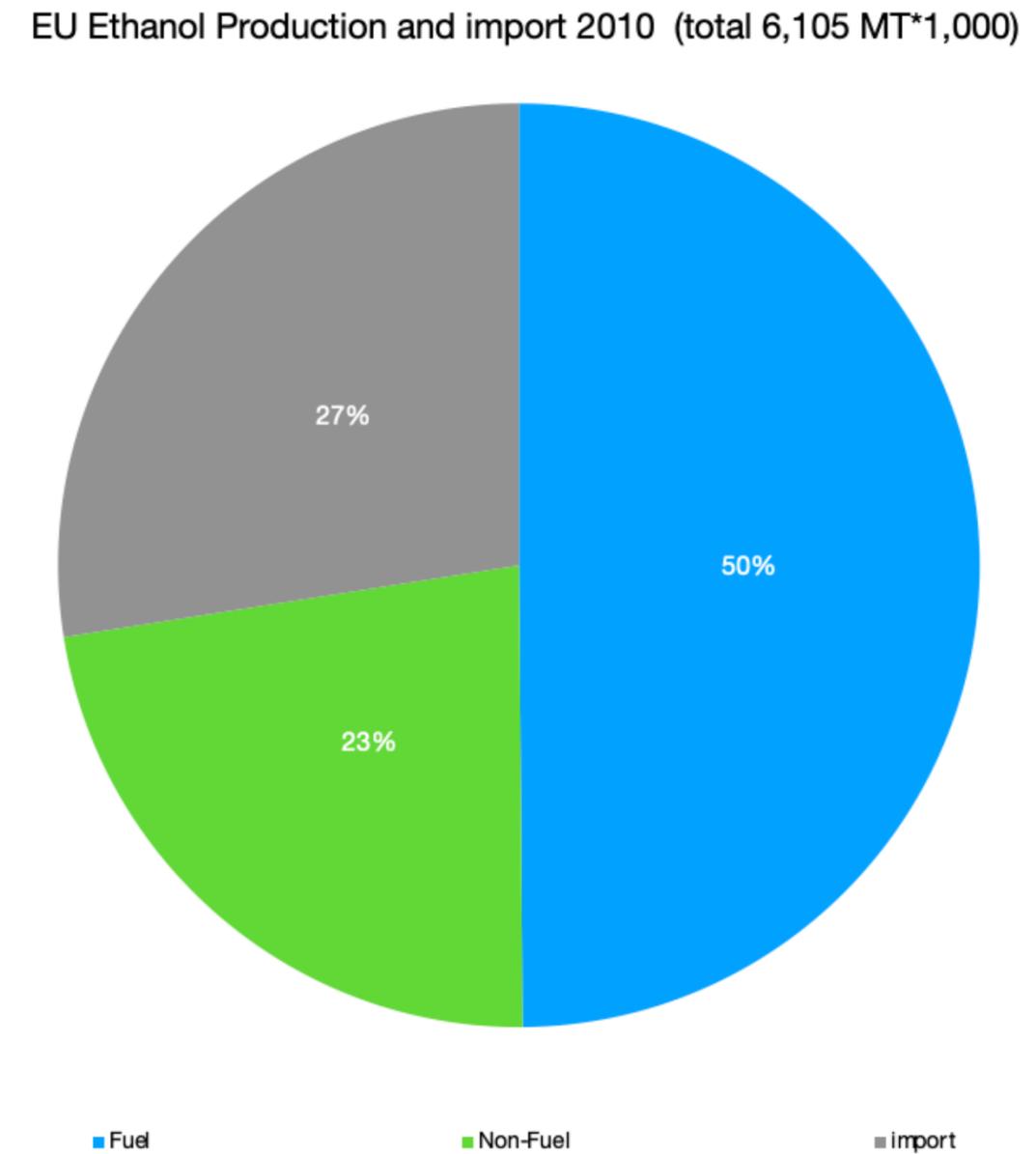
# EU ethanol production + Imports: Fuel & Non-Fuel



# EU ethanol production + Imports: 2023 vs 2010



VS



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# Ethanol prices: EU vs Pakistan

During COVID, no availability of Pakistan extra neutral ethanol (over 75% of PK production) for EU. Since 2022, massive price war leading to an impressive 20% market share today in the EU non-fuel market.

The massive increase of Pakistanese imports have led to a sharp fall of the prices on the Union market from an average of **100 EUR/hl in early 2022 to around 70-82 EUR/hl in January 2024.**

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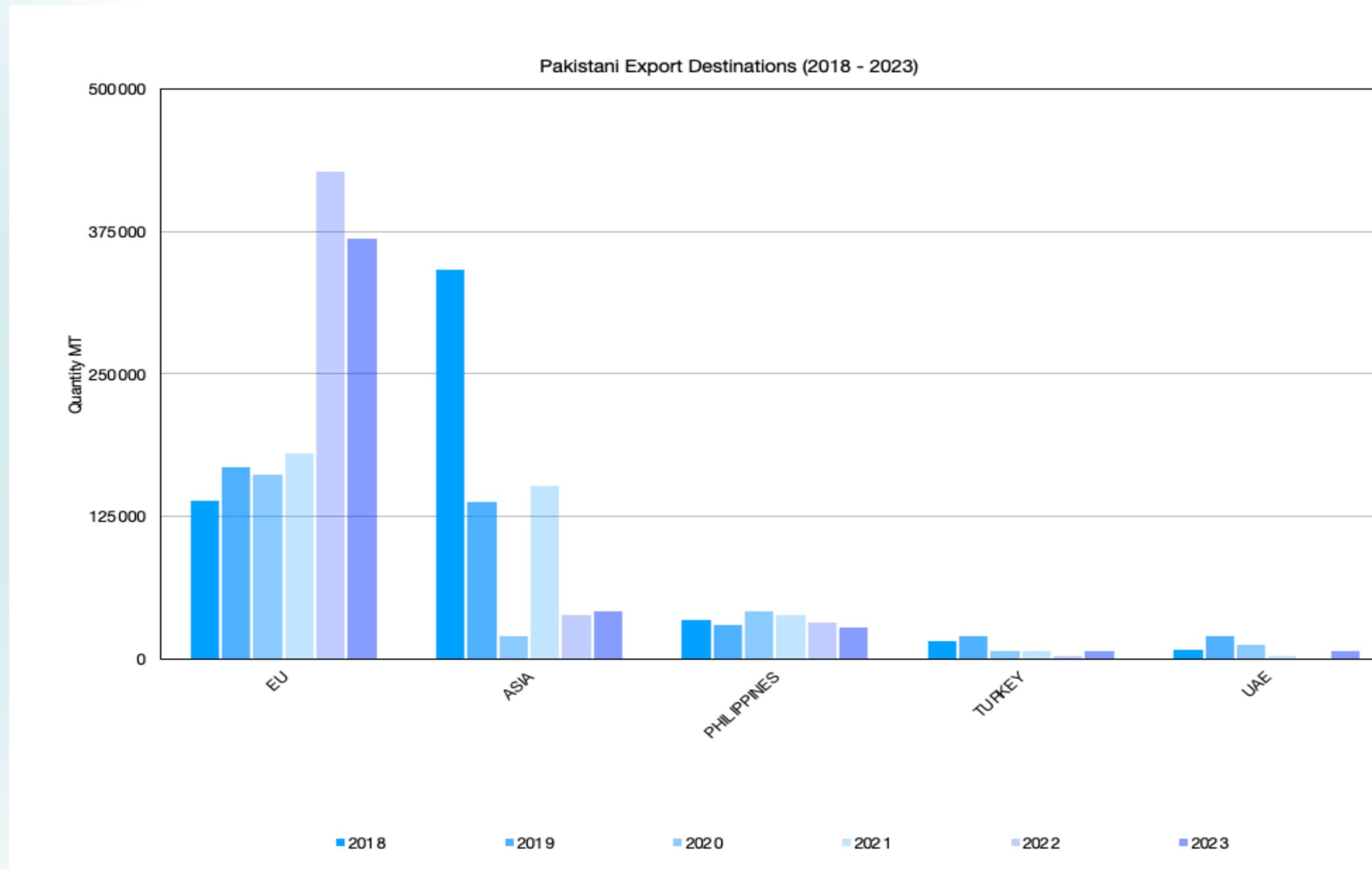
On the other hand, raw materials, labor costs and energy prices in Europe have not decreased by the same measure.

Imports of non-fuel ethanol from Pakistan have caused serious disturbances to the Union market, with undercutting at 26% in 2023.

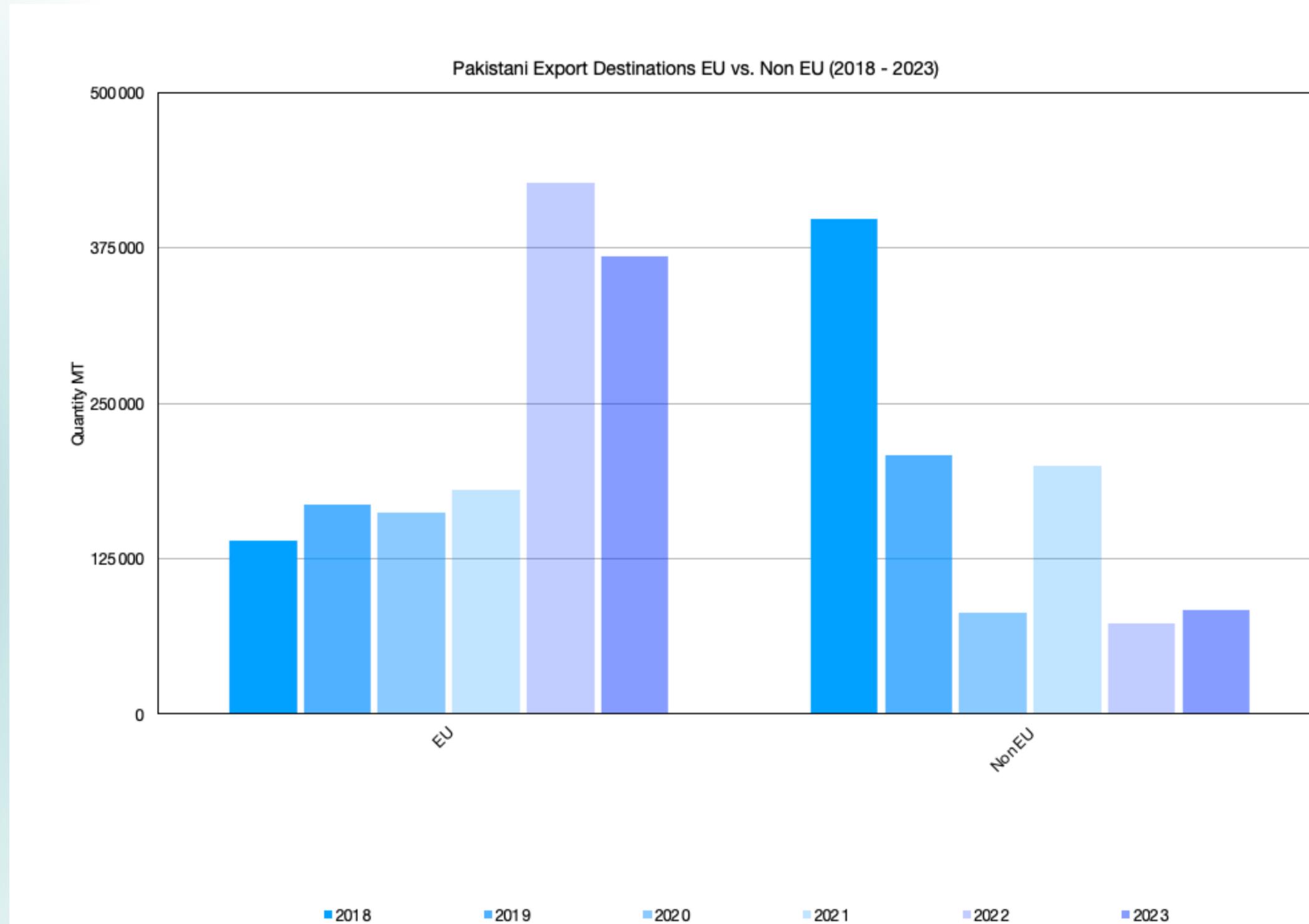
Pakistan produces only non-fuel ethanol, their production not meeting EU RED II sustainability criteria. Hence, PK massive imports to the EU are directly and mostly affecting the non-fuel ethanol industry, where EU production capacity was able to meet demand, now sitting idle or running at low capacity.



**Pakistan's export destinations 2018-2023:** Due to lack of import duties to the EU, Pakistan has switched market from Asia to the EU. China and Far East are obliged to find other origins at higher overseas or regional costs.



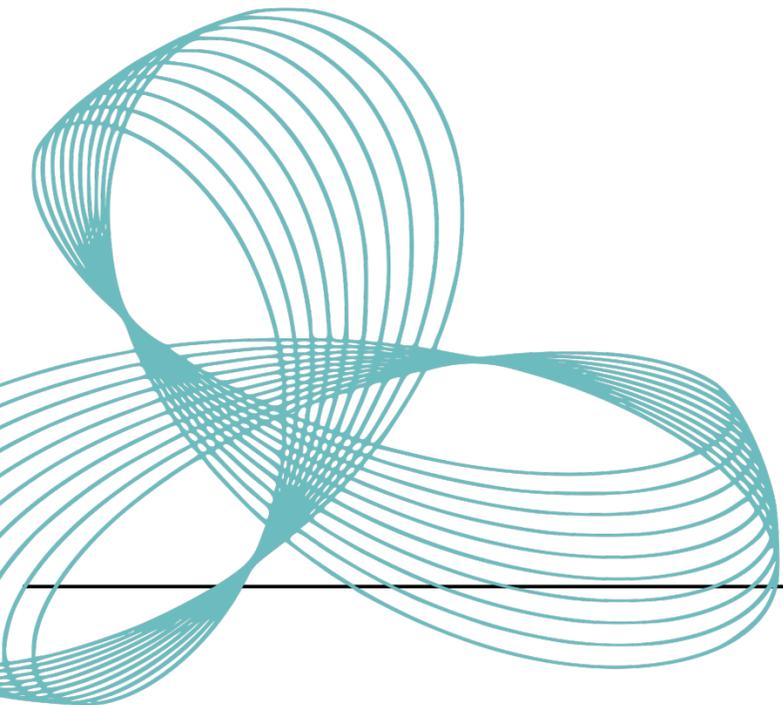
# Pakistan's export destinations 2018-2023 EU vs non-EU



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# iETHANOL



**Thank you for your attention!**



European Industrial & Beverage Ethanol Association

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EU Transparency Register n°: 482977343776-86

**2024**