

Bioethanol Quarterly Report Q1 through Q3 2014

January 2015

Production and consumption: Q1 to Q3 2014

Bioethanol production in Germany during the first 3 quarters of 2014 was higher than production during the same period in 2013. The plants in northern and eastern Germany produced a total of 507,507 tonnes of bioethanol from the renewable raw materials feed grain and industrial beets. By way of comparison, this is an increase of 29,061 tonnes (+ 6.1%).

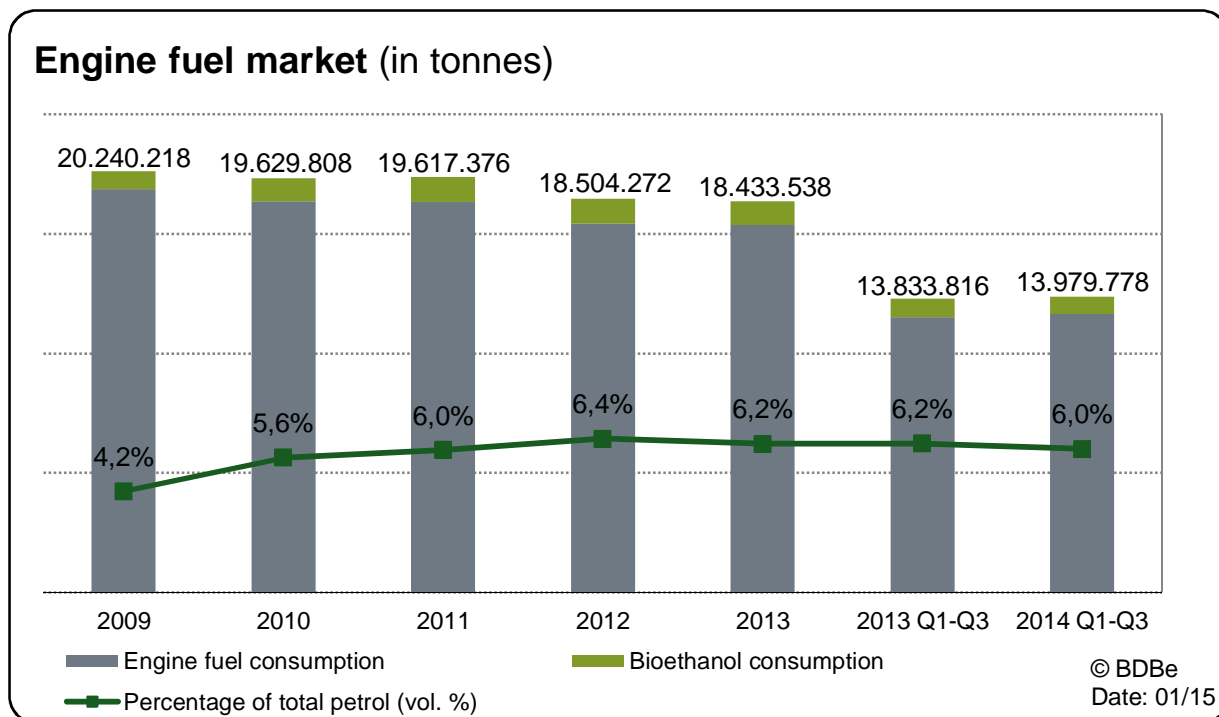
882,912 tonnes of bioethanol were consumed for fuel during the first three quarters of 2014. This represents a decline of 2.5% from the previous year's level of 905,643 tonnes.

Bioethanol in Germany (in tonnes)	2013	2013 Q1-Q3	2014 Q1-Q3
Production	672,028	478,446	507,507
Consumption	1,206,255	905,643	882,912

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In Germany, bioethanol is blended with petrol for Super (E5) and Super E10 fuel. It is also contained in the petrol additive ETBE (ethyl tert-butyl ether) and in E85 fuel, which is only available at independent petrol stations. At the end of Q3 2014, E85 was available at 309 of the around 14,700 German petrol stations.

The German petrol market did not shrink during the first three quarters of 2014. Instead, an increase of 145,962 tonnes was reported year-on-year. Petrol sales declined in 2013 as they did in previous years. By the end of the third quarter of 2014, bioethanol accounted for 6.0% (vol.) of the total petrol market. This percentage was 6.2% (vol.) during the same period in 2013.



During the first three quarters of 2014, Super E5 was once again the most common fuel pumped at filling stations, with sales of around 11 million tonnes and a market share of nearly 80%. Sales of Super E10 rose 4.5% from the previous year to a total of 2.1 million tonnes, giving it a market share of 15.39% almost three years after being introduced to the market.

Development of fuels on the petrol market (in tonnes)			
	2013	2013 Q1-Q3	2014 Q1-Q3
Normal	4,240	3,370	1,662
Super Plus	1,063,504	802.467	801.789
Super E5	14,593,179	10,962,237	11,019,625
Super E10	2,761,350	2,056,782	2,149,969
Total	18,422,273	13,824,856	13,973,045
Engine fuel market share of E10	14.99%	14.88%	15.39%

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Greenhouse gas saving

Biofuels are required by law to reach minimum savings of 35% compared to fossil fuels. In 2014, bioethanol production in Germany achieved - certified - average minimum savings of more than 50% and thus exceeds the legally required minimum savings for 2017.

The requirement to reduce greenhouse gas emissions went into force on 1.1.2015. This requirement based in law stipulates that the affected companies in the mineral oil sector must lower greenhouse gas emissions by 3.5% in 2015 and 2016. These emissions are measured based on the quantities of fuel brought to market during a calendar year. For the period 2017 to 2019, emissions are required to be reduced by 4% and 6% starting in 2020. Germany is the

only member state in the European Union to push through a regulation that will simultaneously lead to competition in greenhouse gas efficiency and optimisation. In practical terms, however, it also means the introduction of CO2 limits for petrol and diesel: starting in 2015, CO2 emissions have to be lowered on average to 2.59 kg/l for petrol and 2.91 kg/l for diesel.

Preliminary results for 2014 and outlook

The BDBe expects 2014 to be as positive overall as 2013. Positive development of Super E10 will allow bioethanol to increase its market share in the future. The change from the energy quota to the greenhouse gas quota required for all biofuels in Germany that went into force on 1.1.2015 will show that the high CO2 savings of bioethanol will encourage sales and ensure its use on the fuel market.

(The complete "2014 market data" will be published in July 2015)

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BDBe - Bundesverband der deutschen Bioethanolwirtschaft (German Bioethanol Industry Association)

Reinhardtstr. 16, 10117 Berlin

Contact:

Carola Wunderlich, press and public relations

T +49 (0)30 301 29 53-13

presse@bdbe.de