

Date: 05/2026

Overview

German bioethanol production increased again last year and has stabilized, following the period of significant fluctuations in the early 2020s. Domestic sales of bioethanol for fuel blending also continued its upward trend. In 2025, bioethanol consumption in the fuel market exceeded 1.3 million tonnes, an increase of over four percent compared to the previous year. Slightly more than half of the total demand for bioethanol in the German fuel market was met by imports. In the overall moderately growing fuel market, gasoline sales rose by just under one percent to about 17.9 million tonnes. At the same time, the blending ratio of bioethanol in the Super E10, Super Plus and Super (E5) grades increased to 6.9 percent by volume (2024: 6.7 percent by volume). The share of Super E10 in the overall market increased again in 2025 – as in previous years – reaching 28.6 percent (2024: 27.5 percent).

Bioethanol production in 2025

Last year, German biorefineries produced slightly more than 790,000 tonnes of bioethanol. Compared to 2024, this represents an increase in production of more than 46,000 tonnes – equivalent to just over six percent. Bioethanol from feed grains continued to account for the largest share of production, at approximately 630,000 tonnes (around 80 percent). Another nearly 160,000 tonnes (about 20 percent) were produced from sugar beet. The share of bioethanol from residues and waste materials was not disclosed in detail by the Federal Office for Agriculture and Food (BLE). The amount of bioethanol produced from sugar beet and molasses amounted to 159,368 tonnes last year, showing another significant increase as in 2024. This represents a year-on-year rise of just under 77 percent. This production volume was achieved using more than 1.8 million tonnes of sugar beets, an increase of approximately 770,000 tonnes from 2024. In total, the processed volume corresponded to about 5.6 percent of the German sugar beet harvest in 2025.

Bioethanol production by raw material (in tonnes)

		2025	630,701	
Total grain		2024	653,941	-3.6%
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of which:	Maize	2025	89,257	-29.3%
		2024	126,329	
		<hr/>		
	Wheat	2025	373,101	8.8%
		2024	342,987	
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	Other	2025	168,344	-8.8%
		2024	184,625	
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Molasses/sugar beet pulp		2025	159,368	76.9%
		2024	90,112	
		<hr/>		
Residues and waste materials*		no data	no data	
		<hr/>		
Total*		2025	790,069	6.2%
		2024	744,053	

*Total without residues and waste materials, no data due to antitrust law

Source: Federal Office for Agriculture and Food (BLE)

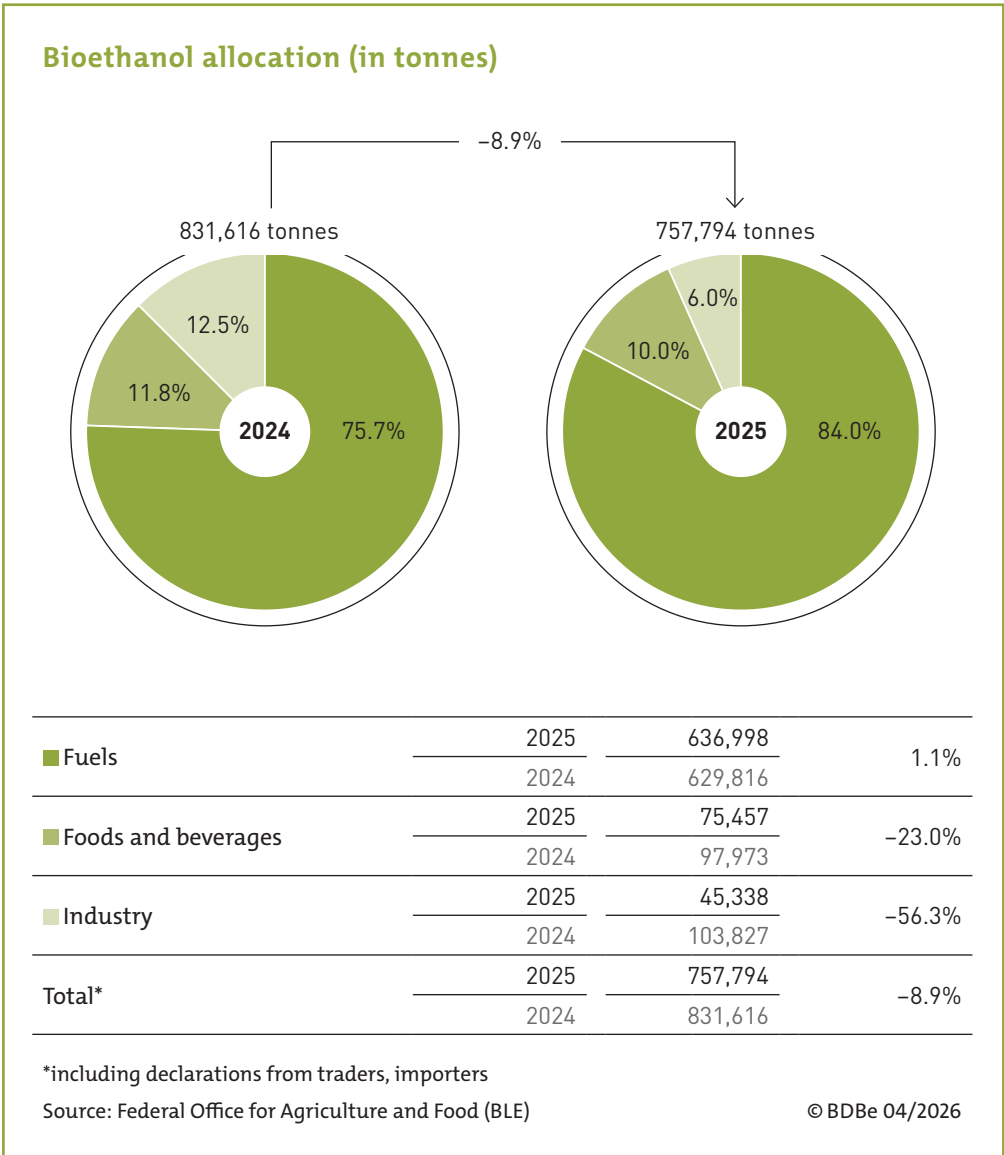
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Despite an overall very good grain harvest of over 45 million tonnes in 2025 (compared to just under 39 million tonnes in 2024) bioethanol production from feed grains declined to some extent. It fell by 3.6 percent from 653,941 tonnes in 2024 to 630,701 tonnes. The quantity of feed grain processed for this purpose, approximately 2.6 million tons, corresponded to a little more than 5.8 percent of the German grain harvest (2024: 6.8 percent). Significant changes were particularly evident in the processing of maize: Here, bioethanol production fell by 29.3 percent, after having risen about 16 percent the year before.

In bioethanol production, the plant components of the raw materials used – in addition to fermentation into bioethanol – are fully utilized and processed into valuable co-products. From the resulting proteins, dietary fiber, minerals, and vitamins, protein feed for animal nutrition and other products for the food and feed industries are produced. In addition, organic fertilizer, biogas, and biogenic CO₂ were produced, the latter being increasingly used in the beverage industry and for technical applications, among other things.

Bioethanol allocation

The total volume of bioethanol produced by German manufacturers decreased by about nine percent compared to the previous year, to approximately 758,000 tonnes (2024: 831,616 tonnes). The decline was particularly noticeable in the chemical and pharmaceutical industries. Following a strong increase in the previous year (+39 percent), the volume sold dropped from over 103,000 tonnes in 2024 to just over 45,000 tonnes in 2025. This corresponds to a decline of about 56 percent. A significant decrease of 23 percent was also recorded in the use of bioethanol in food and beverages: from just under 98,000 tonnes in 2024 to only slightly more than 75,000 tonnes in 2025. In contrast, a slightly positive trend emerged in the fuel sector: The amount of bioethanol used here rose slightly by 1.1 percent from just under 630,000 tonnes in 2024 to just under 637,000 tonnes in 2025.



Bioethanol consumption in the fuel market in 2025

In 2025, the market for gasoline showed moderate growth of just under one percent, with gasoline sales increasing to around 17.9 million tonnes (2024: 17.8 million tonnes). The consumption of bioethanol, which is blended into the fuel grades Super E10, Super Plus, and Super (E5) either directly or as ethyl *tert*-butyl ether (ETBE), also increased, reaching a level of over 1.3 million tonnes (2024: 1.25 million tonnes).

Bioethanol use on the fuel market (in tonnes)

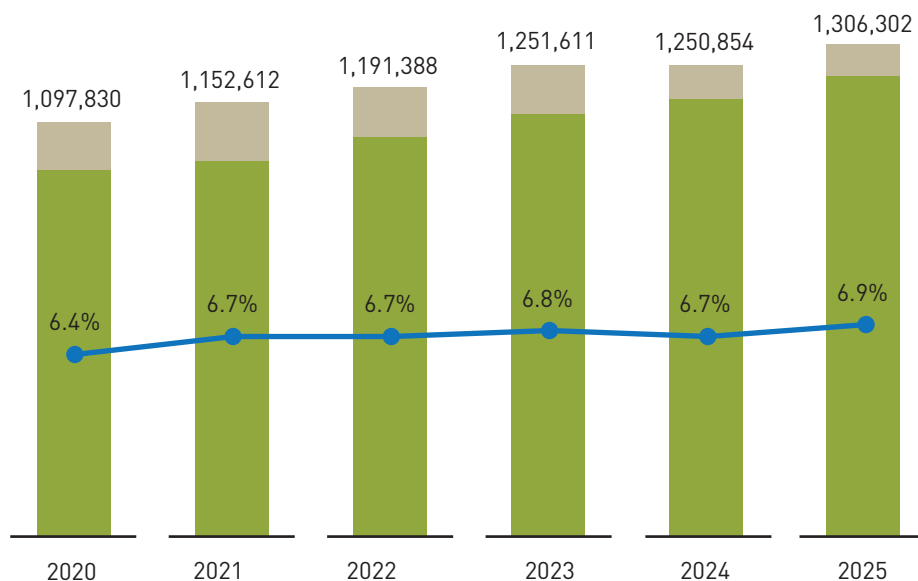
Total bioethanol		2025	1,306,302	+ 4.4%
		2024	1,250,854	
of which:	Bioethanol Fuel additive	2025	1,222,005	+ 5.3%
		2024	1,160,510	
	Bioethanol for ETBE*	2025	84,297	- 6.7%
		2024	90,344	
Engine fuels (incl. bioethanol)		2025	17,876,595	+ 0.6%
		2024	17,762,941	
Share of bioethanol in engine fuels [vol.-%]		2025	6.9%	
		2024	6.7%	

*ETBE: ethyl *tert*-butyl ether, additive produced from bioethanol

Source: Federal Office for Economic Affairs and Export Control

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Bioethanol as a fuel additive in petrol (in tonnes)



Fuel additive in petrol

■ as ETBE* ■ as bioethanol ● Percentage of bioethanol in petrol [vol. %]

*ETBE: ethyl *tert*-butyl ether, additive produced from bioethanol

Source: Federal Office for Economic Affairs and Export Control

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More than 84,000 tonnes were used for the blending of ETBE into gasoline. This meant that usage was again below the previous year's figure (-7 percent) but declined less sharply than in the previous year (-31.1 percent in 2024) and remained below the level of over 90,000 tonnes at that time. The bioethanol blending rate in the gasoline market thus reached 6.9 percent by volume in 2025 (2024: 6.7 percent by volume).

The market share of Super E10 gasoline in total gasoline sales continued to rise in 2025, increasing from 27.5 percent in 2024 to 28.6 percent. The absolute sales volume increased by 4.6 percent to over 5.1 million tonnes. The market share of Super (E5) declined slightly – as in the previous year – and stood at just over 66 percent with sales of 11.8 million tonnes. The market share of Super Plus, which also contains up to 5 percent bioethanol, rose only insignificantly in 2025 to over 0.9 million tonnes, amounting to 5.2 percent (2024: 5.1 percent).

Sales of petrol types 2025 and 2024 (in tonnes)

			Change	Market share
Super Plus	2025	931,967	+3.8%	5.2%
	2024	897,536		5.1%
Super (E5)	2025	11,838,341	-1.2%	66.2%
	2024	11,985,663		67.5%
Super E10	2025	5,106,287	+4.6%	28.6%
	2024	4,879,742		27.5%
Total	2025	17,876,595	+0.6%	
	2024	17,762,941		

Source: Federal Office for Economic Affairs and Export Control © BDBe 05/2026

Outlook 2026

Both robust domestic bioethanol production and the rising market share of Super E10 illustrate a resilient market and underscore its increasingly significant vital role. Against the backdrop of the upcoming relaxation of the protection grade regulations for Super (E5) in Germany, Super E10's market position is expected to strengthen further. Additionally, the recently bolstered greenhouse gas reduction quota (GHG quota), which is set to reach 17.5 percent starting in 2027, is also likely to contribute to a further expansion of Super E10's market share. In addition, the persistently high fuel prices resulting from the war with Iran could further boost demand for Super E10, as Super E10 has had a nationwide price advantage of around 5 to 6 cents per liter over Super (E5) for years. The standardization and market launch of E20 in the EU also offer medium-term prospects. The necessary regulations are scheduled to be discussed later this year.

Super E10 is widely available in Europe and is already available in 19 EU member states as well as in Liechtenstein, Norway, and the United Kingdom. In eleven of these countries Super E10 had already achieved a market share of over 85 percent by 2025. In Italy, Super E10 is expected to be widely available later this year.

Note: Deviations from market data from previous years are due to regular intra-year corrections to the official mineral oil statistics of the BAFA.