Marktdaten

Market data 2013

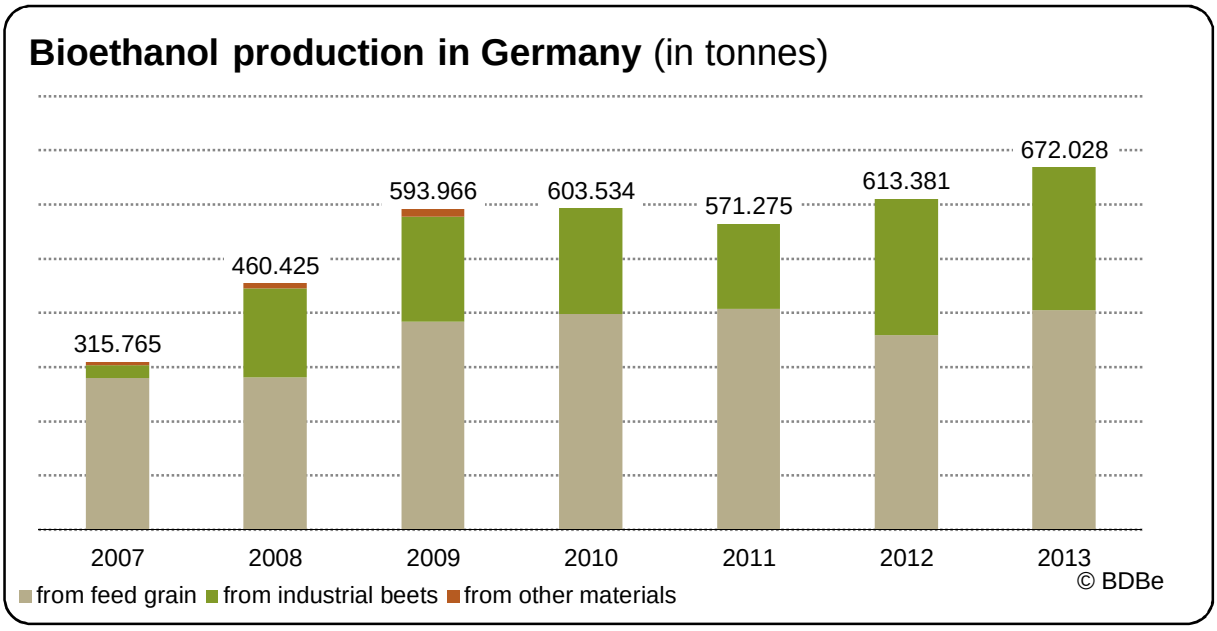
July 2014

Overview

The Bundesverband der deutschen Bioethanolwirtschaft - BDBe (German Bioethanol Industry Association) gives a positive assessment of 2013: bioethanol production in Germany rose by 9.6% to a total of 672,028 tonnes. Biofuel consumption in Germany experienced a slight drop to a total of 1,206,255 tonnes (-3.4%). In the shrinking petrol market (-0.4%), consumption of Super E10 increased from the previous year by 142,845 tonnes, reaching 2,761,350 tonnes (+5.4%). The BDBe anticipates a similar trend in production and consumption for 2014.

1. Production in 2013

Bioethanol production in Germany once again increased. The eight plants in northern and eastern Germany produced a record quantity of 672,028 tonnes of bioethanol from the renewable raw materials feed grain and industrial beets. Other materials, such as residues from the food industry, were not used as in previous years. Overall, production rose by 58,647 tonnes, 9.6% more than in 2012.



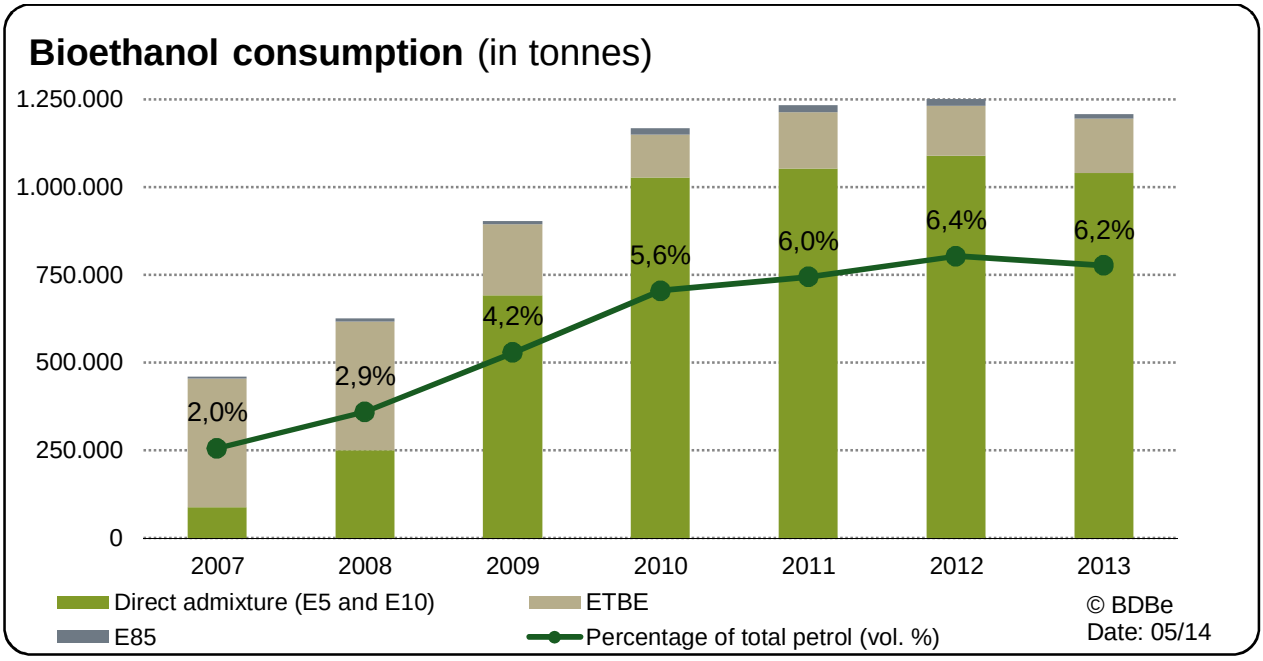
Use of raw materials in 2013

Thanks to the good grain harvest in 2013, the amount of bioethanol produced from feed grains increased to 404,954 tonnes (+12.8%). This increase means that bioethanol producers in Germany produced almost as much bioethanol from feed grain as they did in 2011. Bioethanol production from industrial beets also saw a further increase and reached 267,074 tonnes, a rise of 5.2%. Overall, approx. 2.8 million tonnes of industrial beets and 1.4 million tonnes of feed grain were processed to make bioethanol.

Bioethanol production (in tonnes)				
Bioethanol	**2011**	**2012**	**2013**	**%**
from feed grain	406,838	359,030	404,954	**+12.8**
from industrial beets	164,438	253,866	267,074	**+5.2**
from other materials	0	486	0	
Total	**571,275**	**613,381**	**672,028**	**+9.6%**

2. Consumption in 2013

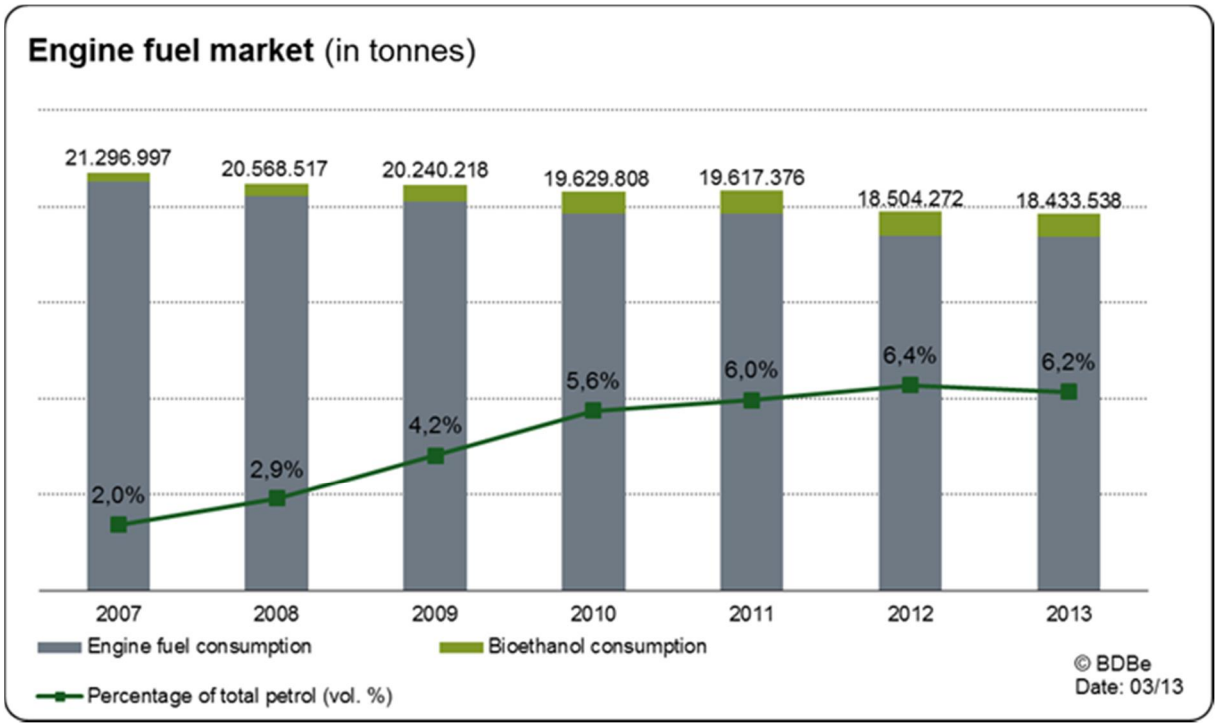
1.21 million tonnes of bioethanol were consumed in 2013. This represents a decline of 3.4% from the 2011 level of 1.25 million tonnes. Bioethanol is most commonly used in Germany as an admixture with petrol for E5 and E10 fuels, followed by use as a petrol additive called ETBE (ethyl tert-butyl ether). The amount of bioethanol used as an admixture dropped by 4.5% to 1.04 million tonnes. The consumption of ETBE rose from 141,676 tonnes to 154,481 tonnes (+9.0%).



Sales of E85 fuel, which is only available at independent petrol stations, fell significantly in 2013. Consumption of E85 was lower for the first time since 2007, declining from 21,326 tonnes to 13,588 tonnes (-36.3%). Ethanol fuel is available at 333 of the approx. 14,700 German petrol stations.

Domestic consumption (in tonnes)						
	2008	**2009**	**2010**	**2011**	**2012**	**2013**
E85 (bioethanol percentage 70-90%)	8,452	8,953	18,103	19,723	20,925	13,588

The German petrol market shrank again in 2013, this time by 0.4% to a total of 18.4 million tonnes. Bioethanol accounted for 6.2% (vol.) of total petrol compared to the previous year when this figure was 6.4% (vol.). This was the first decline reported in the consumption of bioethanol.



In 2013, Super E5 was once again the most common fuel pumped at filling stations, with sales of around 14.6 million tonnes and a market share of nearly 80%. Sales of Super E10 rose 5.4% from the previous year to a total of 2.8 million tonnes, giving it a market share of 15% just two years after its introduction to the market. Sales of Normal and Super Plus, which can contain up to 5% bioethanol, experienced a downturn. Thanks to an increase in sales of Super E10, bioethanol can gain further market share in the future, also in a petrol market that continues to shrink.

Development of fuels on the petrol market (in tonnes)			
	2011	**2012**	**2013**
Normal	199,533	36,788	4,240
Super Plus	2,404,534	1,109,554	1,063,504
Super E10	**1,817,206**	**2,618,505**	**2,761,350**
Super E5	15,186,559	14,721,990	14,593,179
Engine fuel market share of E10	**9.3%**	**14.2%**	**15.0%**

3. Greenhouse gas saving

Biofuels are required by law to reach minimum savings of 35% compared to fossil fuels. In 2013, bioethanol production in Germany achieved certified average minimum savings of more than 50% and thus exceeds the legally required minimum savings for 2017.

Outlook

The BDBe expects the development of bioethanol production to be positive in 2014. Positive development of Super E10 will allow bioethanol to increase its market share in the future. As a result of the change from the energy quota to the greenhouse gas quota in 2015, the high CO2 savings of bioethanol is expected to positively impact price and demand.

Published by:

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