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Report Name: US Biofuels Exports to the Netherlands Surge - New Markets Arise

Country: Netherlands

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Report Highlights:

In 2025, the Netherlands imported $535 million of U.S. biofuels, solidifying its role as a key hub for sustainable road, aviation, and shipping fuels. Starting in 2026, Dutch legislation imposes greenhouse gas (GHG) reduction mandates for marine and inland bunker suppliers, aiming to meet strict emission targets. While the shipping sector explores various alternatives, a significant shift toward biobased diesel fuels is anticipated to meet these evolving requirements. These regulatory changes, particularly focusing on waste-based biofuels in the Port of Rotterdam, are creating new market opportunities for U.S. biofuels and as well as feedstock suppliers.

In 2025, Dutch imports of renewable transport fuels (biofuels) from the United States totaled $535 million. These imports[1] included predominantly bioethanol[2] (with a value of $274 million and a volume of 326,000 MT) and hydro processed esters and fatty esters[3] (biobased HEFA; $261 million, 168,000 MT), and a negligible volume of biobased fatty acid methyl esters[4] (FAME). With these imports the Netherlands is a key hub for biofuels for road transportation, aviation, and shipping. Compared to the Dutch biofuels market for road transport (992,000 MT in 2024; 398,000 MT of bioethanol and 594,000 MT of biodiesels), the markets for aviation (116,000 MT) and marine shipping (246,000 MT) are small but forecast to expand significantly based on global, EU, and national renewable energy and related greenhouse gas (GHG) emission reduction targets. For more information see the EU Biofuels Annual of 2025. Higher demand is forecast specifically for biofuels with high GHG emission reduction values. This report elaborates on the market for sustainable marine fuels (SMF) because the Dutch government recently implemented national legislation for shipping fuel (bunker) suppliers and the port of Rotterdam is the key bunkering hub in Europe.

Beginning on January 1, 2026 with the implementation of the revised second Renewable Energy Directive (REDII), the Netherlands changed from the current biofuel mandate system based on energy content to a system based on GHG based performance. Another novelty is that it includes obligations for marine and inland bunker *suppliers*, which must reduce the GHG emissions of their fuels by respectively 2.9 percent and 2.5 percent in 2026 (all renewable energy included, increasing to respectively 8.2 percent and 14.5 percent in 2030). This Dutch system aims to back the EU Emission Trading System (ETS) and the FuelEU Maritime regulation which are directed toward *shipowners* to reduce the GHG emissions of the fuel they buy from the bunker suppliers. The ETS assigns a price to carbon emissions, making fuels with high GHG emissions more expensive. The EU Regulation set GHG reduction mandates and started with a mandate of two percent in 2025, which progressively decreases to a reduction of six percent in 2030. The Netherlands also adheres to the International Maritime Organization (IMO) strategy, which aims for the uptake of zero or near-zero GHG emission technologies by at least five percent, striving for ten percent, of the energy used by international shipping by 2030.

A distinct difference between the Dutch system and the FuelEU Maritime regulation is that the first focuses on the bunker suppliers and obligations can only be met by bunkering the fuel in the Netherlands. The EU obligation can also be met (by 50 percent) by bunkering the fuel in a non-EU port such as Singapore or New York. Another difference between the two systems is that the EU regulation allows feedstocks listed in Annex IX-B (waste oils and fats) of the REDII (for more information see the 2025 EU Biofuels Annual). The Dutch obligation focuses on feedstocks listed in Annex IX Part A of the REDII (which are mainly municipal and agricultural waste streams such as sewage sludge and fractions from palm oil mills, vegetable oil refineries, and pulp and paper plants). Feedstocks listed in Annex IX-B are not permitted by the Dutch system. Both systems exclude crop-based biofuels. The total volume of bunker fuel sold in Rotterdam, was approximately 9.8 MMT in 2025. Because advanced biofuels typically offer 70–90 percent GHG savings, a volume of about 350,000 MT is required to meet a 2.9 percent GHG reduction across the entire bunker pool.

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[1] Source Eurostat
[2] HS Code 2207, a negligible share is used for other purposes than transport fuel
[3] HS Code 27101942, made available by EU Customs since January 2025
[4] HS Code 3826

While the marine shipping sector initially focused on (partly biobased) methanol and ammonia as non-fossil alternatives to reduce GHG emissions, it recently has been switching to (partly biobased) liquified natural gas (LNG). However, the availability of bio-LNG is limited, and it is anticipated that to fulfill the global targets and EU and Dutch mandates the use will gradually shift to bioethanol and biobased diesels, both FAME and HEFA. The main advantage of HEFA above bioethanol and FAME is that it is a drop-in fuel and can be used without any modification of the ship engine and related fuel storage and distribution systems. The advantage of ethanol is the limited variability and the large volumes of (crop-based) ethanol globally available. However, since ships primarily run on diesel-like fuels, the regulations are anticipated to create a market for mainly biobased HEFA. At the same time, are EU road transportation and aviation sector also require HEFA to comply with the mandates set for these sectors. The total demand for HEFA by the transport sector results in a competitive market for this biofuel as well as for the feedstock to produce the required volumes. Overall, the EU and Dutch regulations for marine shipping fuels are creating opportunities for EU as well as non-EU suppliers of a wide variety of biofuels and feedstocks.

For more information please see the EU Biofuels Annual of 2025 or contact FAS The Hague:

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Attachments:

No Attachments.