



Ethyl alcohol

Global and EU Outlook

Meeting of the Expert group for the Common organisation of the agricultural markets – Arable crops & Olive oil

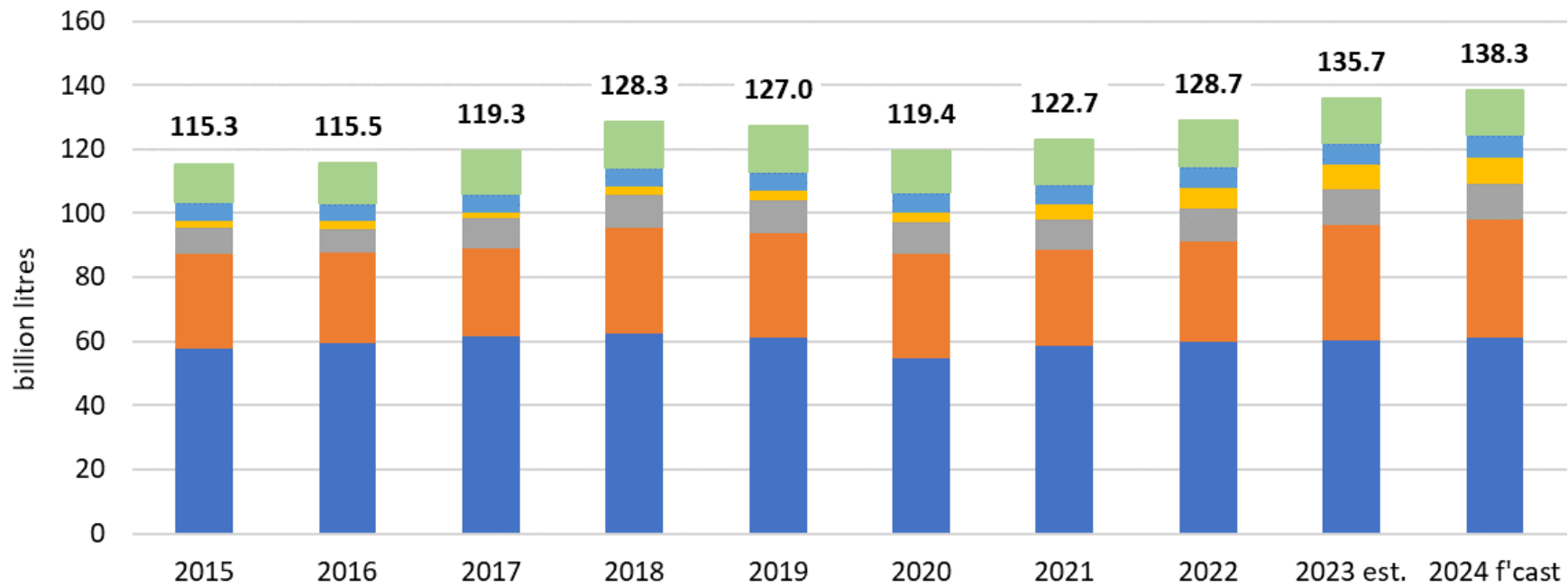
31 October 2024



Global Ethanol Outlook

EU Ethanol Prices

Ethanol: World production

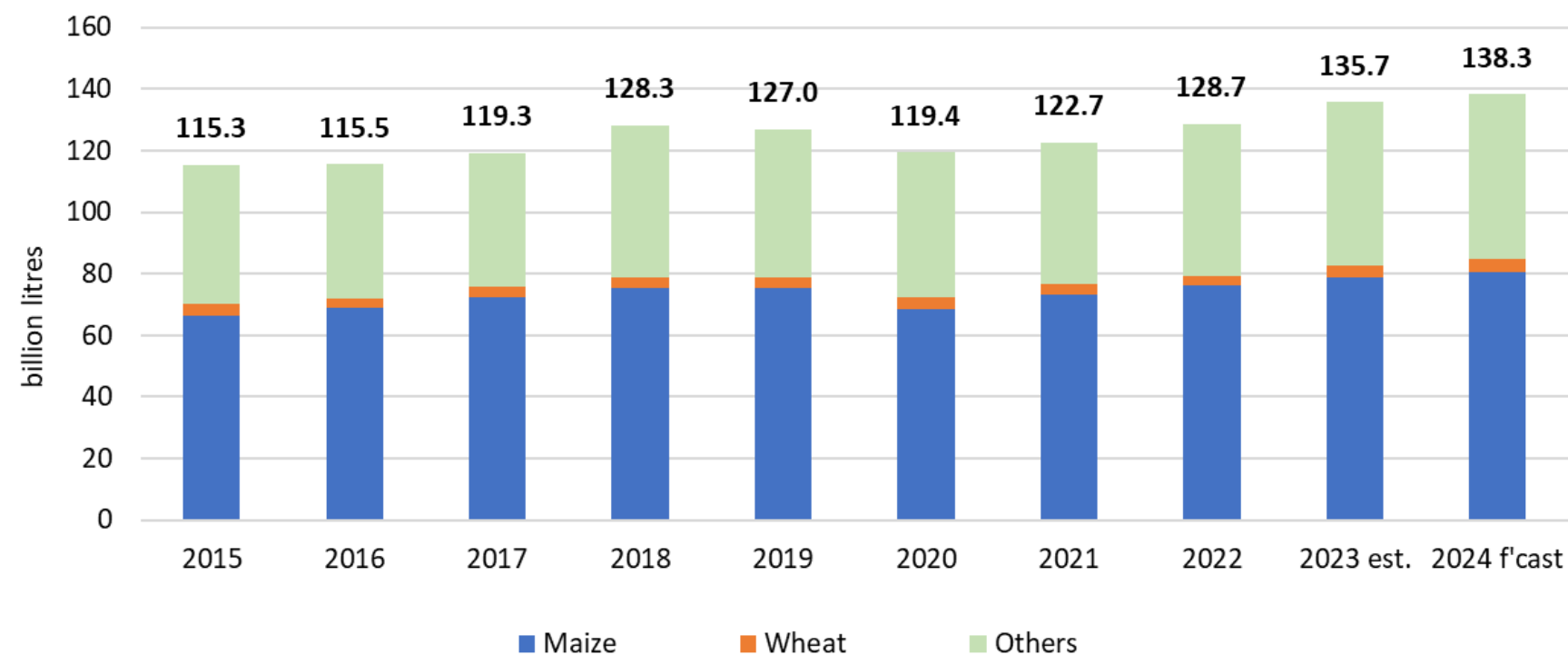


Source: IGC

* Refers to all current EU member states (excl. the UK)

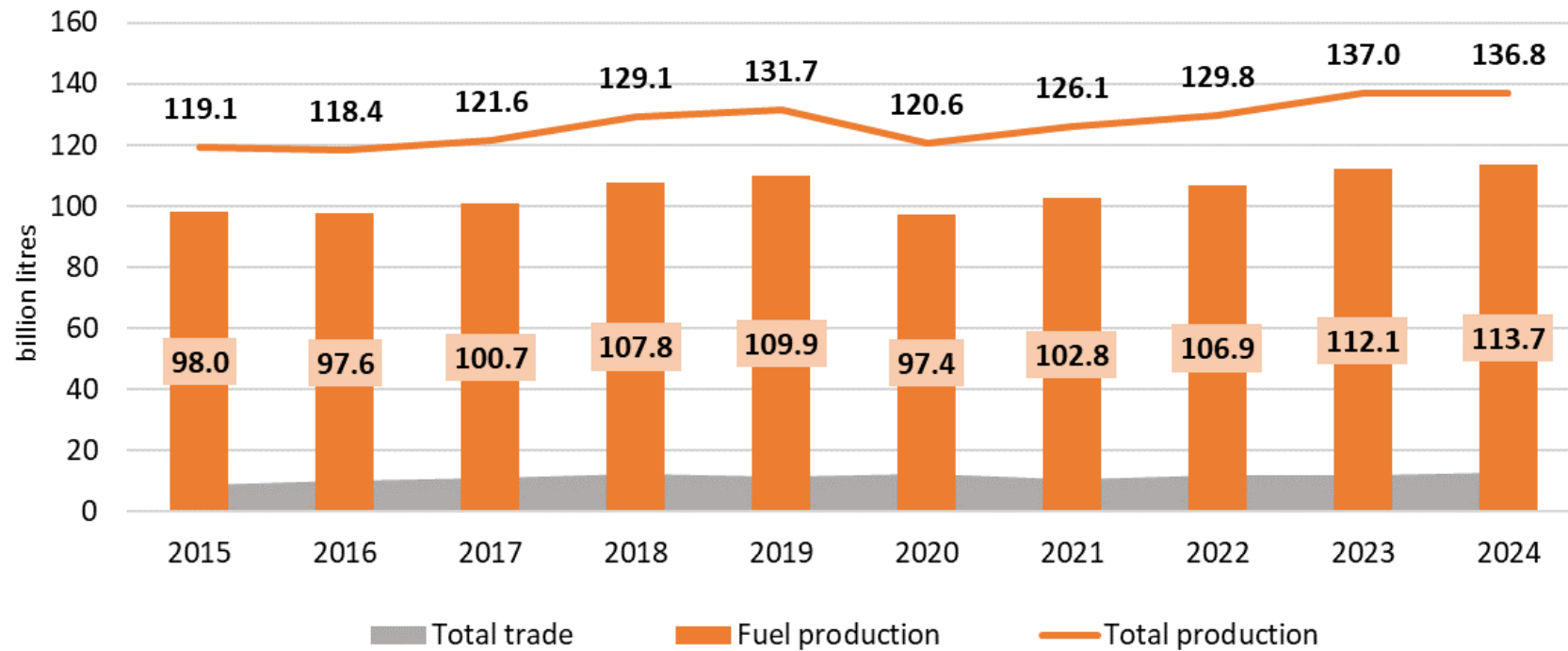
■ US ■ Brazil ■ China ■ India ■ EU* ■ Others

Ethanol: World production by feedstocks



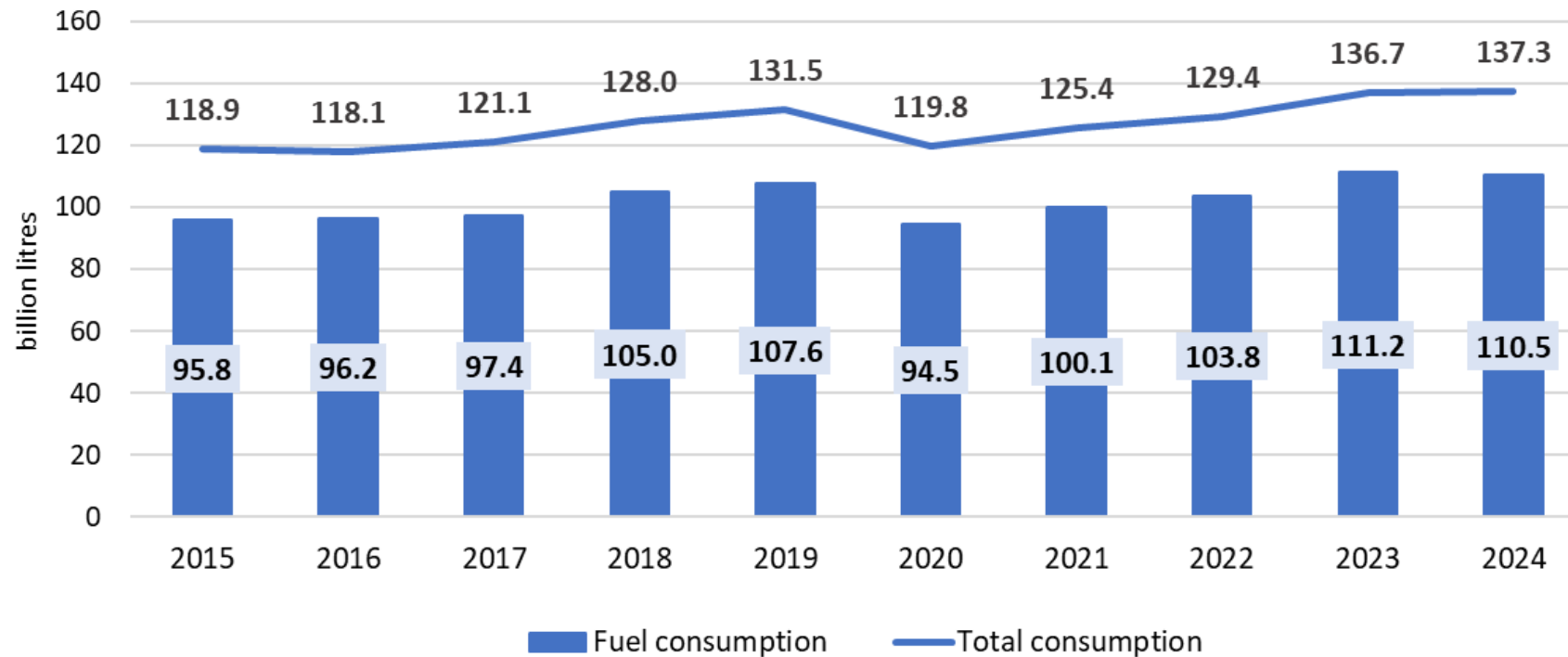
Source: IGC

Ethanol: World production



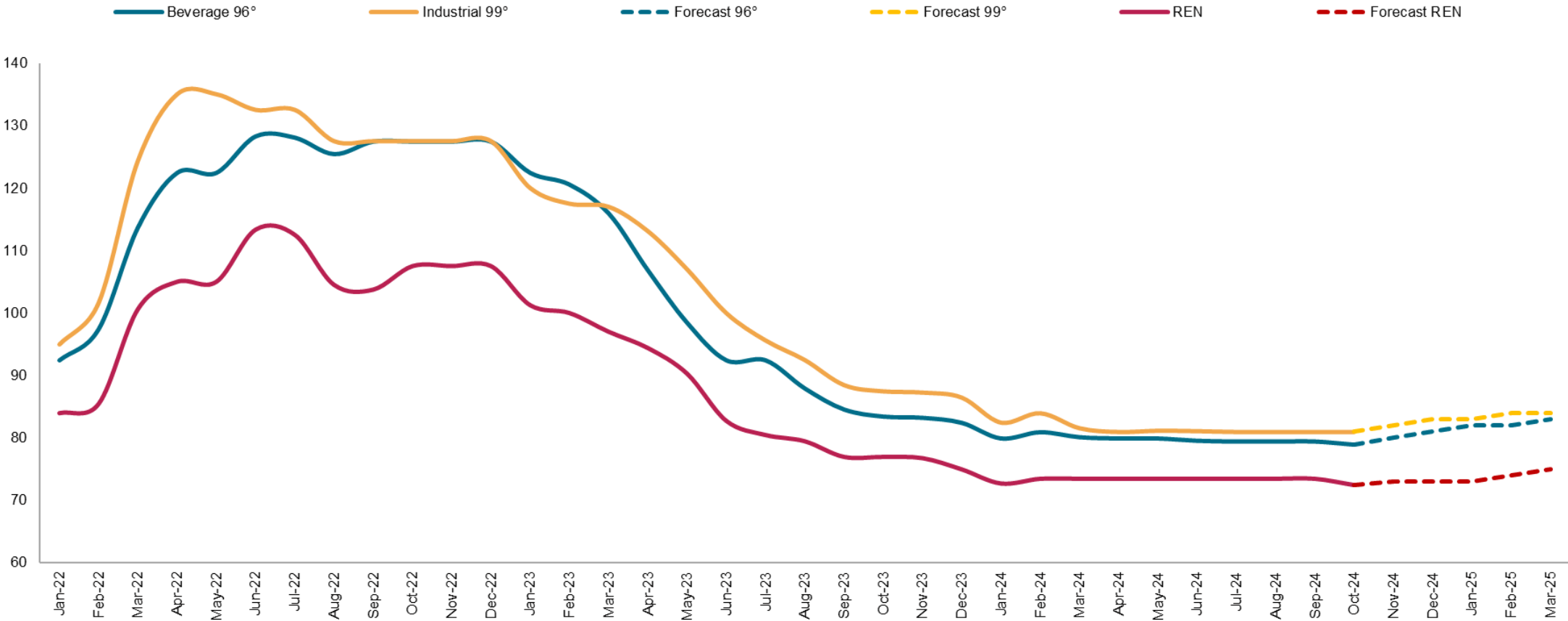
Copyright @ GlobalData PLC. All rights reserved. Reproduction of part or all of this contents without permission is prohibited.

Ethanol: World consumption



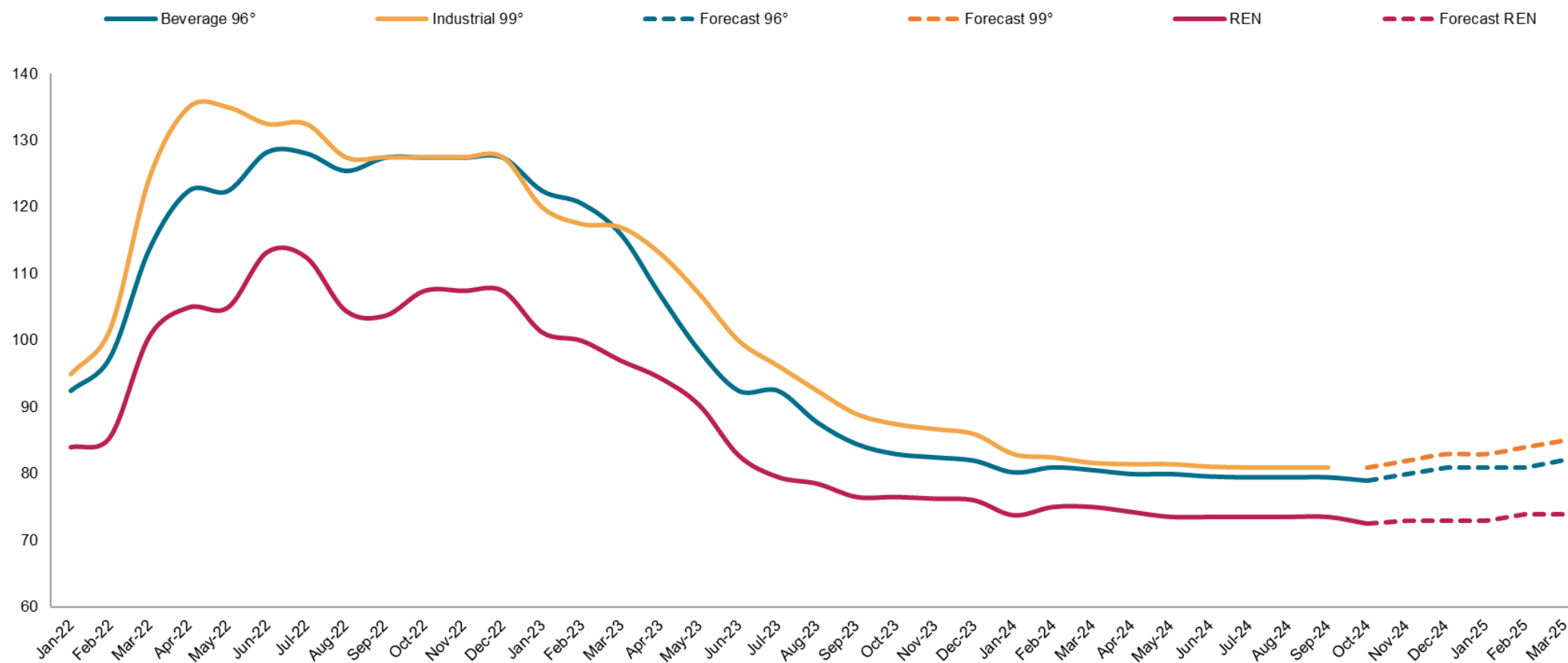
Copyright @ GlobalData PLC. All rights reserved. Reproduction of part or all of this contents without permission is prohibited.

Central Europe - Ethanol spot (€ per hectoliter)



As of Oct. 14, 2024.
Source: S&P Global Commodity Insights.
© 2024 S&P Global.

West Europe - Ethanol spot (€ per hectoliter)

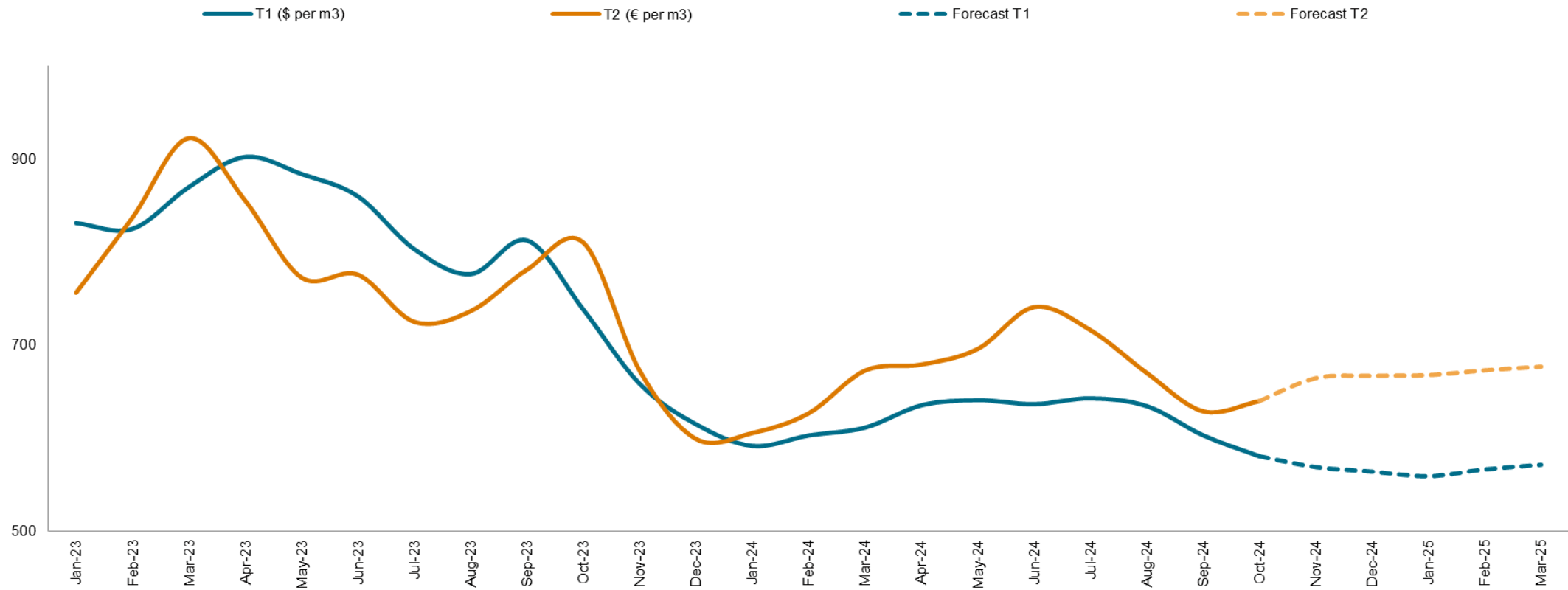


As of Oct 14, 2024.

Source: S&P Global Commodity Insights.

© 2024 S&P Global.

Northwest Europe - Fuel ethanol spot



As of Oct. 14, 2024.
Source: S&P Global Commodity Insights.
© 2024 S&P Global.



EU Ethyl alcohol supply and demand 2023

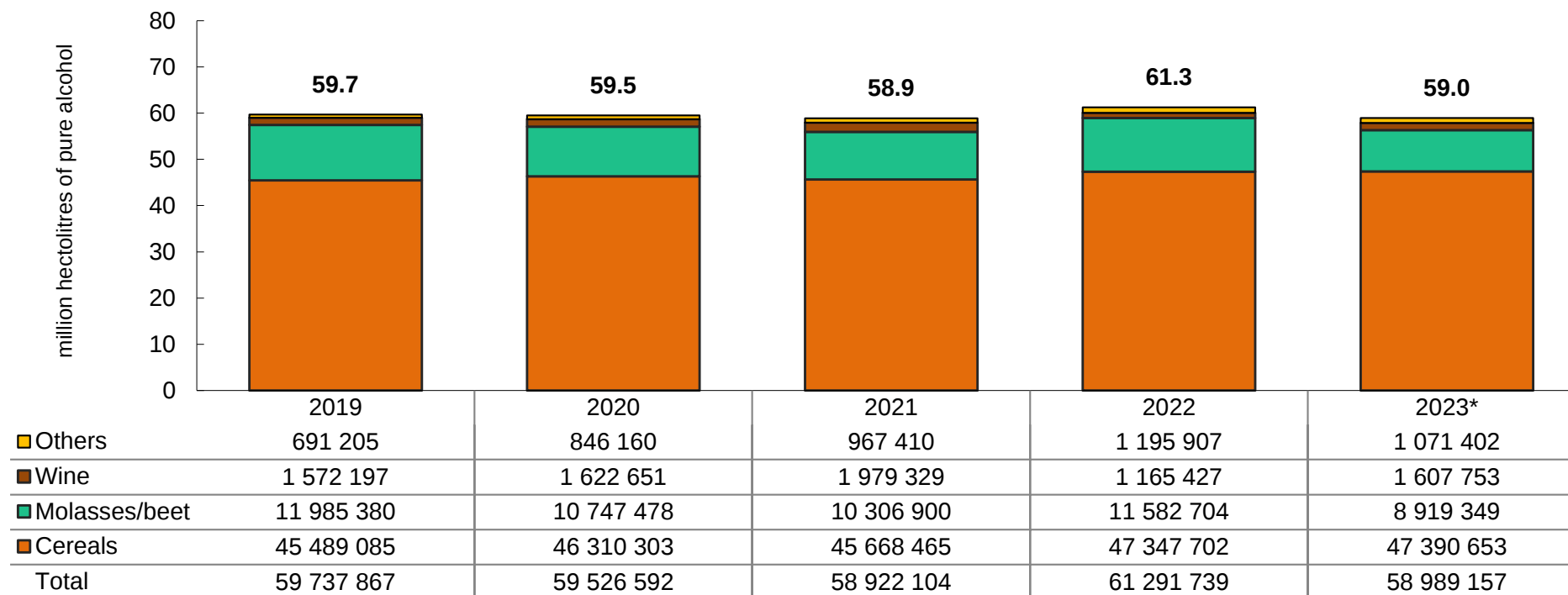
Preliminary draft

Member States notifications on ethanol of agricultural origin

- *Obligation set by Commission Implementing Regulation (EU) 2017/1185 – Article 12(b), Annex III. Point 10 (a) and (b)*
 - production broken down by the agricultural raw material from which the alcohol is produced
 - disposal broken down by category of use (food and beverages, fuels, industrial/Others)
 - Period of notification: by 1 March each year in respect of the previous calendar year

EU27 - Ethyl alcohol from agricultural origin

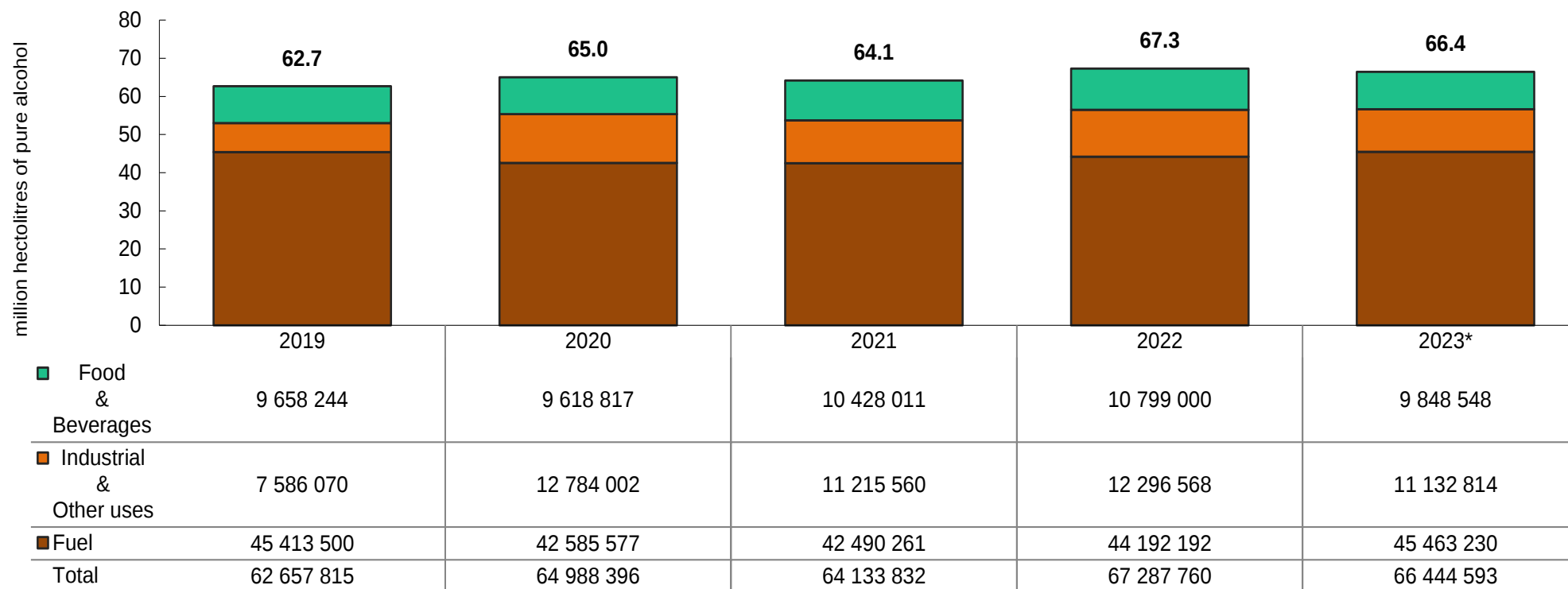
Production by raw material



* For 2023, the EU supply and demand does not include Croatia, Latvia and Malta. Missing data for Belgium and Spain for 2022 and 2023 were compiled using other sources.

EU27 - Ethyl alcohol from agricultural origin

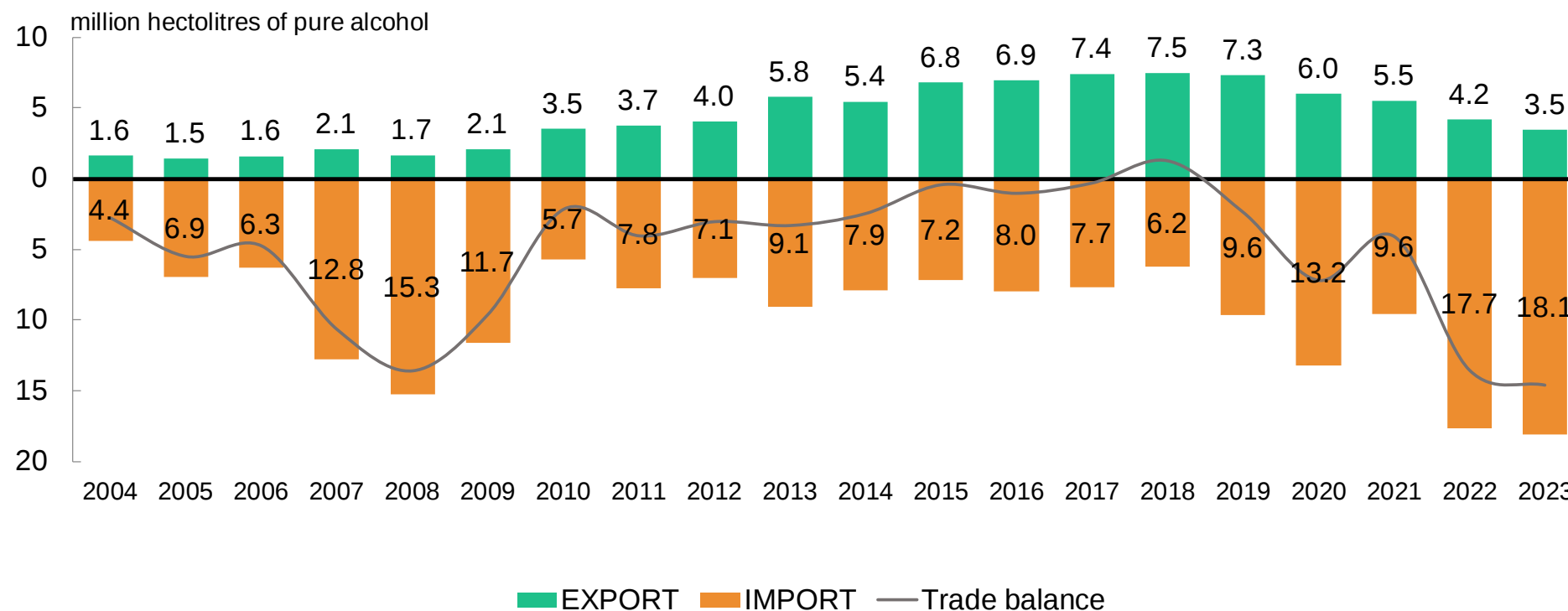
Disposal by sector of destination



* For 2023, the EU supply and demand does not include Croatia, Latvia and Malta. Missing data for Belgium and Spain for 2022 and 2023 were compiled using other sources.

EU27– Ethyl alcohol trade evolution

CN 2207 10, CN 2207 20, CN 2208 90 91, CN 2208 90 99 (excl. inward processing*)

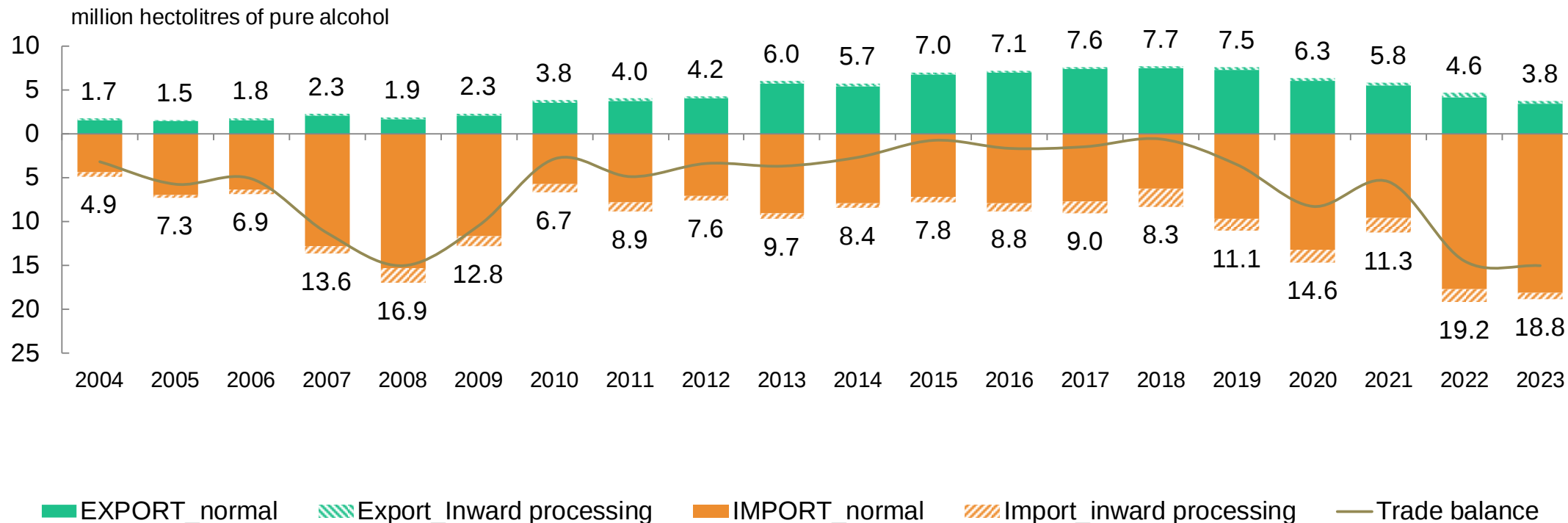


Source: Eurostat - Comext (data extraction 28.6.2024; since previous publication most recent data may reflect possible corrections by Member states)

* Inward processing is a duty relief procedure. It allows goods to be imported into the European Union (EU) for processing, with suspension of import duties and VAT. The processed products which result from the processing can either be re-exported or released to free circulation.

EU27– Ethyl alcohol trade evolution

CN 2207 10, CN 2207 20, CN 2208 90 91, CN 2208 90 99 (incl. inward processing*)



Source: Eurostat - Comext (data extraction 28.6.2024; since previous publication most recent data may reflect possible corrections by Member states)

Import origins

Stat. Reg 1 - imports without inward processing in HLP A				
Import origin	2022	2023		y/y
EXTRA EU	17 691 289	18 068 766	↑	+2%
Pakistan	4 429 548	3 574 076	↓	-19%
United States	3 236 557	3 122 486	↓	-4%
Brazil	2 541 168	3 164 782	↑	+25%
United Kingdom	1 682 050	2 365 848	↑	+41%
Peru	1 229 362	1 275 021	↑	+4%
Guatemala	968 616	722 567	↓	-25%
Canada	776 841	847 114	↑	+9%
Paraguay	413 923	663 305	↑	+60%
Bolivia	349 074	116 445	↓	-67%
Costa Rica	338 521	203 874	↓	-40%
Moldova, Republic of	305 913	145 470	↓	-52%
South Africa	291 015	428 264	↑	+47%
Ukraine	250 348	747 998	↑	+199%
Russian Federation	125 944	21 691	↓	-83%
Egypt	139 749	87 668	↓	-37%
Argentina	116 646	2 665	↓	-98%
Norway	104 094	220 354	↑	+112%
Sudan	103 579			
Nicaragua	68 200	124 253	↑	+82%
Switzerland	53 876	64 597	↑	+20%
Türkiye	51 245	64 440	↑	+26%
Others	115020	105848	↓	-8%

Source: ESTAT/Comext, data extraction 28.6.2024

All regimes - Total imports in HLP A				
Import origin	2022	2023		y/y
EXTRA EU	19 155 732	18 813 340	↓	-2%
Pakistan	4 429 839	3 574 076	↓	-19%
United States	4 243 421	3 591 163	↓	-15%
Brazil	2 936 628	3 440 679	↑	+17%
United Kingdom	1 682 050	2 365 848	↑	+41%
Peru	1 229 362	1 275 021	↑	+4%
Guatemala	968 616	722 567	↓	-25%
Canada	776 841	847 114	↑	+9%
Paraguay	413 923	663 305	↑	+60%
Bolivia	349 074	116 445	↓	-67%
Costa Rica	338 521	203 874	↓	-40%
Moldova, Republic of	305 913	145 470	↓	-52%
South Africa	291 015	428 264	↑	+47%
Ukraine	250 348	747 998	↑	+199%
Russian Federation	187 772	21 691	↓	-88%
Egypt	139 749	87 668	↓	-37%
Argentina	116 646	2 665	↓	-98%
Norway	104 094	220 354	↑	+112%
Sudan	103 579			
Nicaragua	68 200	124 253	↑	+82%
Switzerland	53 876	64 597	↑	+20%
Türkiye	51 245	64 440	↑	+26%
Others	115020	105848	↓	-8%

Source: ESTAT/Comext, data extraction 28.6.2024

EU27 - Preliminary draft of 2023 Supply and demand (compared with previous years)

EU27 Ethyl alcohol supply and demand 2023 (compared with previous years)

	2019	2020	2021	2022	2023*	Y/Y
Production	59 737 867	59 526 592	58 922 104	61 291 739	58 989 157	-4%
Imports	9 648 083	13 193 402	9 597 687	17 691 289	18 068 766	+2%
Exports	7 296 396	6 011 574	5 532 828	4 164 780	3 473 886	-17%
Disposal	62 657 815	64 988 396	64 133 832	67 287 760	66 444 593	-1%
<i>Food and beverages</i>	9 658 244	9 618 817	10 428 011	10 799 000	9 848 548	-9%
<i>Industrial/other</i>	7 586 070	12 784 002	11 215 560	12 296 568	11 132 814	-9%
<i>Fuel</i>	45 413 500	42 585 577	42 490 261	44 192 192	45 463 230	+3%

Quantity in hectolitres of pure alcohol (HLPa)

Sources: MS notifications (production and disposal); EUROSTAT (imports and exports); market information

* For 2023, the EU supply and demand does not include Croatia, Latvia and Malta. Missing data for Belgium and Spain for 2022 and 2023 were compiled using other sources.

Imports and exports cover only products under codes CN 2207 10, CN 2207 20, CN 2208 90 91 and CN 2208 90 99; data extraction 28/6/2024

The United Kingdom is no longer a Member State of the European Union, however where it is deemed relevant (e.g. for comparison purposes) an EU+UK aggregate are still displayed



© European Union 2020

Unless otherwise noted the reuse of this presentation is authorised under the [CC BY 4.0](https://creativecommons.org/licenses/by/4.0/) license. For any use or reproduction of elements that are not owned by the EU, permission may need to be sought directly from the respective right holders.