Message from the President and Secretary General ................................................................. 4-5

Key Highlights (2018-2019) ........................................................................................................ 6-7

Energy & Environment — Building policy support for ethanol in Europe .......................... 8-9
Technical & Regulatory Affairs — Compiling and analysing industry data ...................... 10
Trade — Ensuring a balanced and competitive European ethanol market ..................... 11
Communications — Raising awareness of ethanol’s benefits ........................................... 12-13

Governance & Structure ........................................................................................................... 14-18

• About us............................................................................................................................. 14
• Our structure ..................................................................................................................... 15
• Board member companies ............................................................................................ 16
• Associate members ........................................................................................................ 17
• Our team .......................................................................................................................... 18
A new start for European renewable ethanol

A year ago, in the spring of 2018, the future of the European ethanol industry was more than a little bit uncertain. The EU was finalising its renewable energy policy for the 2020-2030 period and dealing with the occasionally thorny question of what role biofuels should play in it. The so-called RED II debate often provoked strong disagreements – and just as often was based on misconceptions.

At ePURE, we had spent the previous two years battling those misconceptions and working to inform policymakers that phasing out conventional biofuels such as ethanol – as the Commission had initially proposed – would deal a severe blow to EU climate and energy ambitions. Our advocacy and communications teams – from the secretariat and from member companies – made the case in meetings, at events and conferences, and in our public messaging.
What a difference a year makes. In the end, the RED II agreement turned out to be relatively good for the industry – and, not coincidentally, for the EU’s efforts to fight climate change. The European Parliament and Member States agreed that there are good biofuels and bad biofuels – and that renewable EU ethanol is on the side of the good. Under the adopted legislation, renewable ethanol would continue to play a role in the fight against climate change as part of the EU energy mix.

Our work since then has focused on making sure that contribution is as significant as possible. Just because ethanol should play a role does not necessarily mean it will. If Member States do not maximise the uptake of renewable ethanol – for example by rolling out E10 as the standard petrol grade – then the EU will still be missing an opportunity to use an immediately available homegrown solution to reduce transport emissions, and jeopardise the coexistence of crop-based and cellulosic ethanol.

The work we have done at ePURE and with our members has included new efforts to highlight the benefits of ethanol – with our informative “Ethanol Facts” website and a multilingual campaign to promote E10 – to ensure that opportunity is not missed.

We still believe there is a promising future for European ethanol if policymakers do the right thing and support sustainable biofuels as a readily available and effective solution to fighting climate change. That means encouraging production in both first- and second-generation ethanol as part of a larger focus on the importance of bioenergy and the bioeconomy.

In this report we highlight more of the work done over the past year by ePURE and its members to make European renewable ethanol as prominent as possible on the EU policy agenda.

To be sure, challenges remain. As the EU considers its long-term efforts to reduce emissions and improve air quality, it will be more important than ever to inform politicians of ethanol’s crucial role. After the 2019 European elections, many of those politicians will be new to the EU energy debate. We look forward to giving European ethanol producers an even more prominent voice in it.
Key Highlights (2018-19)

The great decarbonisation debate

ePURE and POLITICO co-organized our annual policy conference in June 2018, “Decarbonizing transport: assessing all solutions.” The event brought together senior policymakers, experts and industry representatives for a frank discussion about clean mobility solutions in Europe.

Just the facts

ePURE launched the new website Ethanol Facts, a one-stop-shop for information about the production, use, sustainability and importance of ethanol as a renewable fuel. The broader campaign to engage with citizens and influencers included a new Twitter account, @ethanolfacts.

New study confirms ethanol benefits

Research from independent consultancy firm Ricardo Energy & Environment, published in June 2018, shows how prevalent internal combustion engines will be on Europe’s roads in the coming decades and confirms that low-carbon fuels are essential to achieve decarbonisation objectives in the medium-to long-term.

Ethanol drives decarbonisation

Once again, European renewable ethanol delivered record-high GHG savings, 70% on average compared to fossil petrol.

ePURE’s advocacy work

Throughout the year, ePURE’s advocacy work aimed at influencing policymakers on key legislative decisions such as the final adoption of the Renewable Energy Directive, the Clean Mobility Package and the EU’s 2050 decarbonisation strategy. Our advocacy team and members met with policymakers and regulators; engaged with media and stakeholders; and took part in events.

Promoting E10

ePURE published a new multilingual brochure highlighting the benefits of E10 for reducing transport emissions. The publication was translated into six other languages besides English, and formed the basis of a social media campaign.

An ethanol blend to fuel Europe’s clean mobility...
The EU launched its long-term vision for decarbonisation by 2050 in November. ePURE highlighted the importance of bioenergy and biofuels to achieving this goal, and called on EU policymakers to be consistent in biofuels policy.

An animated video produced by ePURE makes the case for ethanol as a realistic clean mobility solution that delivers results today and will be essential in the coming decades.

ePURE supported its members and the Commission during the expiry review of anti-dumping duties against U.S. ethanol imports.

Several international agencies – including the IEA and IRENA – published reports highlighting the need to boost the use of sustainable biofuels in transport in order to meet EU’s climate goals.

ePURE’s media outreach resulted in coverage throughout the year in several publications, including POLITICO, EURACTIV, Argus Media, Biofuels International, F.O. Licht, Ethanol Producer Magazine, Platts.

Working together with other associations in the biofuels and bioeconomy value chain, ePURE was instrumental in helping coordinate messages on our key issues.

For the second year in a row, ePURE stepped up its digital presence, with social media campaigns in several languages promoting our messages on E10, ethanol benefits and key policy initiatives.

Renewable ethanol continues to build its popularity in France, where motorists have already made E10 the top-selling gasoline blend and, in 2019, E85 showed huge sales growth, mainly thanks to conversion systems certifications.

Several international agencies – including the IEA and IRENA – published reports highlighting the need to boost the use of sustainable biofuels in transport in order to meet EU’s climate goals.
Renewable Energy Directive: negotiation process and approval

ePURE engaged with policymakers accompanying the trilogue negotiations for the Post-2020 renewable energy policy (RED II), presenting our views and seeking compromises. ePURE coordinated positioning and advocacy activities with other Biofuel Chain stakeholders. Following the successful conclusion of the negotiations process, ePURE has maintained a constant dialogue with the European Commission to clarify the interpretation of several provisions and worked, through its members, for a proper implementation of the new rules.

Delegated Regulation on high and low ILUC-risk biofuels

Following the adoption of RED II, ePURE participated in an experts workshop organised by the European Commission on the definition and certification of high and low ILUC-risk biofuels. ePURE also participated in several Parliament briefings and stakeholders’ events, and met Commission services to inform officials about our views ahead of the adoption of the delegated act. We also participated in the experts group meeting and submitted our response to the Commission’s consultation on the draft delegated act. Ahead of the presentation and exchange of views of the delegated act in Parliament we reached out to the ITRE and ENVI Members to share our views, often in coordination with other stakeholders representing the interest of biofuels produced from European feedstock.

Further information available on our website:
- Response to the Commission’s consultation on the draft delegated act

Energy Governance: RED II and Effort Sharing

In order to support national efforts to draft INEPCs for the period 2020-2030, ePURE launched a project aiming at reconciling RED II and Effort Sharing targets and requirements.

Based on the progress made since 2005 by each Members State in terms of GHG reduction in non-ETS sectors and of renewable energy incorporation in the transport sector, we modelled the 2030 emissions shortfall that would be created in a business as usual scenario.

Building on this result, we aimed at proving that RED II should be seen as a minimum objective to be exceeded in order to achieve the necessary national climate target: the transport sector should be deeply decarbonised by at least maintaining the current incorporation of crop-based biofuels.

National biofuels policies

In September ePURE updated its overview of the status of transposition of biofuels policies including the so-called ILUC Directive in every Member State. Our comprehensive overview of the biofuel policies and market across the EU-28 serves to inform the European Commission, national governments and ePURE members of the state of play and best practices to implement the existing framework. We also published the table of national policies in the 28 Member States for 2019.

Further information available on our website:
- Overview of the biofuel policies and markets across the EU-28
- Overview of biofuel obligations in the EU in 2019
Building policy support for ethanol in Europe

Clean Planet for All (2050 Strategy)
ePURE also followed other files including the Strategy for long-term emission reduction. ePURE submitted its response to the European Commission’s consultation on the Strategy. Ahead of the discussions at Council and Parliament levels, ePURE adopted and conveyed its position to national administrations through our network of Member States leads and Parliament.

Further information available on our website:
• ePURE’s response to the European Commission’s consultation on the Strategy for long-term EU GHG emission reduction
• ePURE position paper on long-term EU GHG emission reduction Strategy

Post-2020 CO₂ standards for light-duty and heavy-duty vehicles, revision of the Clean Vehicles Directive
Following the publication of its position early 2018, ePURE focused its efforts on the revision of CO₂ standards for cars and vans. ePURE supported the work of the different Members and rapporteurs of the European Parliament. Building on the study commissioned from Ricardo and published in July 2018 on the potential scenarios for the EU light-duty vehicle fleet, their associated energy needs and emissions for 2020-2050, ePURE adopted in October 2018 its updated position paper before the launch of the trilogue negotiations. ePURE sought to coordinate positioning and advocacy with other stakeholders of the energy and transport industries.
ePURE also worked on the closely related files of the post-2020 CO₂ standards for heavy duty vehicles and the revision of the Clean Vehicles Directive. Addressing legislative developments at Parliamentary and Council level, ePURE coordinated actions at national level to promote common clean mobility positions.

Further information available on our website:
• Europe’s Clean Mobility Outlook: Scenarios for the EU light-duty vehicle fleet, associated energy needs and emissions, 2020-2050
• Post-2020 CO₂ targets for light duty vehicles – ePURE position for trilogue negotiations
Compiling and analysing industry data

**ePURE keeps members, stakeholders and the public informed with the latest industry data and analysis**

**Statistics**

In September 2018, ePURE released industry data for the year 2017. In January 2019, we launched the exercise covering data for the year 2018 – including modifications based on input from ePURE members, consulting lawyers and the audit service, Copartner.

**Further information on our website:**

- European renewable ethanol – key figures

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**Certified average greenhouse gas emission savings of renewable European ethanol compared to fossil fuel**

Since 2011 the average certified greenhouse gas emission savings of renewable ethanol against fossil fuel have increased continuously, reaching 70% in 2017.

![Weighted average certified emission savings in %](image)

**Certified average greenhouse gas emission savings of renewable European ethanol compared to fossil fuel**

Since 2011 the average certified greenhouse gas emission savings of renewable ethanol against fossil fuel have increased continuously, reaching 70% in 2017.

**E10 at Member State level and E20/25 work**

In support of the introduction of E10 at national level, ePURE submitted its contribution to the UK consultation on E10, consumer protection and fuel labelling. Pointing out the shortcomings of the UK government original proposal, ePURE recommended to follow the E10 introduction process conducted with success in Belgium. ePURE also continued its participation in the H2020 research project on E20/25. Complete results of the project are expected to be publicly released in 2019.

**Fuel labelling and revision of the Alternative Fuels Infrastructure Directive**

ePURE monitored the introduction of fuel labelling requirements at EU level, regularly liaising with fuel suppliers and car manufacturers representatives. The initiative will allow better consumer information while facilitating future national introduction of E10.

Following the standard EN 16942, these requirements stem from the Alternative Fuels Infrastructure Directive, the evaluation of which will be carried by the Commission in 2020. In that context, ePURE participated in the Sustainable Transport Forum and provided input to the Commission’s consultation on the roadmap for the evaluation of the Directive.

**Protein Balance Sheet**

ePURE collaborated with the European Commission and more specifically DG AGRI on its initiatives related to the European protein supply. ePURE participated in the technical meeting aiming at updating for 2018 the Protein Balance Sheet which provide a comprehensive overview of the supply and demand situation for protein used for feed purposes in the European Union.

**External work**

ePURE maintained its participation and the representation of the ethanol industry in the Art Fuels Forum (II). ePURE is also a member of the association dedicated to the Carbon Capture and Utilisation, CO2 Value Europe.
Ensuring a balanced and competitive European ethanol market

ePURE advocates a trade policy that is consistent with EU energy and climate goals.

Trade policy

ePURE defends the interests of EU ethanol producers against unfair trading practices and seeks to ensure a level playing field when competing with third country renewable ethanol producers.

Anti-dumping duties imposed by the EU on fuel ethanol imports originating in the United States were set to expire in February 2018. The Commission launched an expiry review investigation on 20 February 2018 to assess whether the anti-dumping duties can be prolonged for a 5-year period. Over the course of the past year, ePURE actively supported the Commission throughout the investigation. The Commission’s decision to repeal the duties was published on 14 May 2019, and ePURE responded with a press release.

In the framework of several ongoing and forthcoming trade negotiations between the EU and third countries, ePURE provided its views to the European Commission, requesting the sensitive treatment of renewable ethanol, notably with India and Indonesia. Treating ethanol as sensitive in negotiations with leading sugar producing countries is justified even when a large ethanol industry does not yet exist in those markets. There are important synergies between sugar and ethanol production, which means that those countries could exploit any EU market opening in the form of tariff liberalisation.

Moreover, ePURE advocated for the introduction of effective rules of origin to ensure that any possible future bilateral market access concessions are not inadvertently benefiting other third country ethanol producers.

ePURE objected to requests for the authorisation of licences for the Inward Processing of non-fuel renewable and synthetic ethanol into other chemicals. ePURE argued that the economic conditions for granting an authorisation could no longer be considered to be met. The EU industry has sufficient capacity available to supply the required quality and quantity of renewable ethanol to meet domestic demand.
Raising awareness of ethanol's benefits

Ensuring ethanol's place in the EU energy mix defined by RED II

ePURE's Communications team supported Government Affairs activities during the final stages of the RED II debate, helping deliver the best possible outcome for the European ethanol industry. Actions included the creation of new animated infographics on ePURE's key messages, a coordinated and targeted social media campaign, and regular outreach to journalists.

Highlighting ethanol as a long-term clean mobility and decarbonisation solution

ePURE's annual event, co-sponsored by POLITICO, focused on the need for low-carbon liquid fuels in decarbonising transport. It was coordinated with a communications campaign built around the results of the Ricardo study showing the importance of biofuels to achieving EU clean mobility goals. Additionally, ePURE's partnership with EURACTIV included a weeklong series of articles on ethanol's importance to EU clean mobility ambitions. EURACTIV also produced a video reportage during a tour of the Alco Bio Fuel biorefinery in Gent.

Making the case for a Europe-wide E10 rollout

ePURE launched a multi-platform communications campaign to promote the benefits of E10 ethanol blend. This included a four-page brochure illustrating why E10 and higher ethanol blends should be used to help EU Member States meet their national renewable energy targets. The campaign also included a social media component, including updated infographics. The E10 brochure was translated into several languages for use at Member State level.
Raising awareness of ethanol's benefits

Debunking myths about ethanol

To better educate policymakers and the public about ethanol, ePURE launched a new website, www.ethanolfacts.eu, with a simple Q&A format aimed at addressing key issues. The launch was accompanied by campaign of infographics and animations promoted on social media. The website can be read in three languages: English, French and German.

ePURE press releases:

• Trade decision is bad for EU’s ethanol industry, farmers – and climate ambitions – 15 May 2019
• Several countries declare strong support for biofuels – 15 April 2019
• The long-term vision for a climate neutral EU also needs short-term action – 19 March 2019
• Commission still needs to do better on palm oil – 13 March 2019
• No real progress made in cutting EU reliance on fossil fuels – 27 February 2019
• EU keeps palm oil in the mix – 11 February 2019
• Can Europe still be the world leader in clean energy? – 29 January 2019
• E10 ethanol needed for immediate climate progress in transport – 14 December 2018
• When it comes to long-term transport decarbonisation, Commission has a short attention span – 28 November 2018
• Europe’s new protein strategy needs fortifying – 22 November 2018
• RED II is now reality. What’s next for biofuels? – 13 November 2018
• New ethanolfacts.eu website launches – 6 November 2018

• EU greenhouse-gas emissions continue to rise. It’s time to maximize sustainable biofuels – 29 October 2018
• Europe’s ethanol industry boosts production of low-carbon fuel and high-protein feed – 4 September 2018
• New report highlights updated biofuel policies and markets across the EU-28 – 29 June 2018
• European ethanol sets new high level for greenhouse gas savings – 20 June 2018
• EU recognises importance of crop-based ethanol to achieving climate goals – 14 June 2018
• Low-carbon fuels crucial to achieving EU clean mobility goals, new study shows – 11 June 2018
About us

ePURE is a members-driven association, with a Board of Directors, Working Groups and a permanent Secretariat based in Brussels.

Once a year our members meet in a General Assembly to approve the annual budget and accounts, confirm the President and Vice-President of the association and update the association’s bylaws as necessary.

The Board of Directors consists of senior executives of companies based in Europe who are directly involved in the production of renewable ethanol. The Board meets at least four times a year, and determines new strategies, policies, positions, actions and representations of the association. It delegates responsibilities to the President and the Secretary General and appoints the latter.

ePURE has several permanent Working Groups and temporary task forces that provide technical expertise and advisory support to the Board on a number of topics. These groups are composed of experts from our member companies and are coordinated by the Secretariat.

ePURE also coordinates a platform of national ethanol associations and a beverage and industrial alcohol platform. The Secretariat supports the Board and the various working groups and task forces and is responsible for the day-to-day work of the association.

The Secretary General oversees the Secretariat’s work and ensures that the association’s priorities are being developed and implemented.
ePURE’s Board members are companies that produce renewable ethanol in Europe or have a high degree of participation in the sector.
A number of organisations that do not produce ethanol in Europe are associate members of ePURE, including national ethanol associations and companies involved in the ethanol value chain covering a diverse range of sectors including engineering and enzyme technology.

- Assodistil (www.assodistil.it)
- BBA (www.belgianbioethanol.be)
- BDBE (wwwbdbede)
- Betatech (www.betatechopproducts.com)
- DuPont (www.dupont.com)
- Lallemand (www.lallemandbds.com)
- Lesaffre Advanced Fermentations (www.lesaffreadvancedfermentations.com)
- Mitsui (www.mitsui.com/eu)
- NAPA (United Kingdom)
- Philbro (www.pahc.com)
- Praj (www.praj.net)
- Starsupply (www.star supplied.ch)
- SNPA (www.alcool-bioethanol.net)
- Tarkim (www.tarimsalkimya.com.tr)
- UEP (Czech Republic)