



# ETHANOL UNLEASHED

2026 ETHANOL INDUSTRY OUTLOOK

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## A NOTE FROM OUR CEO

Day in and day out, **tens of thousands** of workers in the ethanol value chain take grain from America’s farm fields and transform it into clean, renewable fuel and valuable coproducts.

But those dedicated workers aren’t just making and delivering ethanol, distillers grains, and corn oil to the world’s consumers—they are solving problems. Big problems. Like air pollution, rising carbon emissions, affordability challenges, energy security concerns, and rural economic struggles.

In reality, if you work in the ethanol industry, you’re in the problem-solving business. Time and time again, ethanol has proved its value as a solution

for cleaning up the air we breathe, slashing carbon emissions, cutting costs for consumers, strengthening national security, creating jobs, and bolstering our farm economy.

But these problems—and the need to proactively address them—aren’t going away. And American ethanol could be doing so much more to confront these societal challenges—if only we had increased access to the marketplace and government policy that truly unleashed ethanol’s full potential.

Against that backdrop, **this year’s Annual Ethanol Outlook provides the facts, data, and evidence** to substantiate ethanol’s incredible benefits. And it also provides the roadmap for expanding those benefits through the removal of barriers and roadblocks to increased ethanol production and use worldwide.

Indeed, the 2026 Outlook is meant to provide an insightful look at the world we seek to create—a world in which ***Ethanol is Unleashed***.



**RFA President and CEO**  
Geoff Cooper, Renewable Fuels Association

## INSIDE THE OUTLOOK

Ethanol Unleashed.....	2	Beyond 10 Percent.....	18
Farm-to-Fuel Connection.....	4	Ethanol for Energy Independence.....	20
Raising the Standard.....	6	Ethanol’s Valuable Coproducts .....	22
Incentivizing Innovation .....	8	Serving a Global Marketplace .....	24
Ethanol by Air and Sea .....	10	Seeking the Truth .....	26
Industry Economics.....	12	Supporting Our Members.....	28
A Healthier Fuel Option.....	14	Reaching Consumers.....	30
The Importance of Octane.....	16	About RFA .....	32

# ETHANOL UNLEASHED

2025 was a strong year for the U.S. ethanol industry, marked by such significant policy victories as the long-awaited approval of E15 as a transportation fuel in California, one of the nation's largest fuel markets. Ethanol production reached a record 16.4 billion gallons, while exports continued their year-over-year growth, setting another record at 2.2 billion gallons.

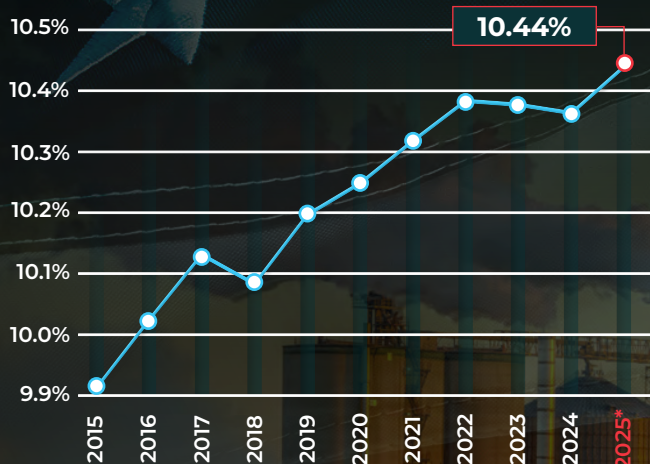
These policy successes, combined with expanding markets for renewable fuel and coproducts, position the industry for yet another record-setting performance in 2026. While national attention has shifted from climate policy toward reinvigorating the agriculture sector, affordability, and boosting U.S. energy independence, American-made ethanol continues to offer a practical solution for meeting all of these goals. Ethanol can energize transportation by land, air, and sea, powering everything from compact crossovers to passenger jets and container ships. In addition to delivering lower prices at the pump and stimulating demand for American crops, ethanol significantly reduces smog-forming emissions and greenhouse gases.

But to truly unleash ethanol's potential in 2026 and beyond, policymakers must prioritize the removal of antiquated regulatory impediments and continue to embrace thoughtful policies, like the Renewable Fuel Standard, that create market access for lower-cost, cleaner-burning fuels.

## ETHANOL PRODUCTION CAPACITY BY STATE

State	Existing Production Capacity (MGY)	Capacity Under Constr./Expansion (MGY)	Installed Ethanol Biorefineries	Biorefineries Under Constr./Expansion
IA	4,947	21	42	1
NE	2,380	0	24	0
IL	1,977	50	14	1
MN	1,477	0	19	0
SD	1,468	0	16	0
IN	1,460	0	15	0
OH	755	0	7	0
WI	647	0	9	0
KS	625	1	12	1
ND	557	0	6	0
TX	425	0	4	0
MI	392	2	5	1
MO	335	0	6	0
TN	245	0	3	0
CA	187	0	4	0
CO	155	0	3	0
PA	120	0	1	0
NY	63	0	1	0
NC	62	0	1	0
ID	60	0	1	0
AZ	55	0	1	0
KY	55	0	2	0
OR	40	0	1	0
VA	2	0	1	0
<b>U.S.</b>	<b>18,489</b>	<b>74</b>	<b>198</b>	<b>4</b>

## ANNUAL ETHANOL BLEND RATE



Source: RFA, based on U.S. Energy Information Admin. data  
\*Forecast

Source: RFA, as of December 2025



# FARM-TO-FUEL CONNECTION

From the very beginning, the U.S. ethanol industry has had a deep and lasting connection to agriculture. For farmers, ethanol represents more than just another market for their crops; it is an industry that stabilizes demand, supports prices, and creates broader economic opportunities across rural communities. Billions of dollars of investment from local farmers helped build ethanol biorefineries across the country. And today, farmers continue to own dozens of those facilities and share in their profits. In fact, of the 320,000 jobs supported by the ethanol industry in 2025, more than two-thirds were tied to agriculture.

Ethanol's ability to buoy the farm economy has never been more important. In 2025, farmers produced a record-large corn crop of 17 billion bushels and notched a record average yield of 186.5 bushels per acre. The result of that incredible productivity was a grain supply that overwhelmed demand, sending prices, farmland values, and grower profitability to painful lows.

Thankfully, a record amount of corn use for ethanol (5.6 billion bushels) helped boost an otherwise languishing farm economy, reduced volatility for farmers, and kept a floor under prices in 2025.

But to truly restore demand-driven dynamics and bring hope and prosperity back to farm country, leaders in Washington must adopt policies that expand markets for ethanol. That starts with

implementing a strong Renewable Fuel Standard and allowing year-round, nationwide E15. Indeed, a recent study by RFA and the National Corn Growers Association found nationwide adoption of E15 would create new demand for 2.4 billion bushels of corn, **adding \$4 billion** in farm income and supporting 64,000 jobs across the economy.

To be sure, the future success of our nation's farming communities depends on expanding value-added markets for corn and other crops. And the best way to do that is to truly *unleash the power of American-made ethanol*.

## One Kernel, Multiple Products

On average, 1 bushel of corn (56 pounds) processed by a dry mill ethanol biorefinery produces:



**2.9 GALLONS**

of denatured fuel ethanol



**14.0 POUNDS**

of distillers grains animal feed (10% moisture)



**1.0 POUND**

of distillers corn oil



**16.0 POUNDS**

of captured biogenic carbon dioxide (CO<sub>2</sub>)

Approximately 30 percent of U.S. dry mills capture CO<sub>2</sub> from fermentation.

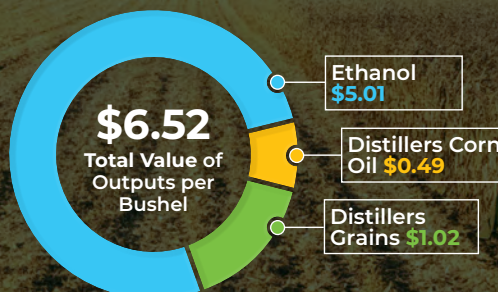
Source: RFA based on U.S. Dept. of Agriculture data.

## Ethanol Adds Value for Farmers

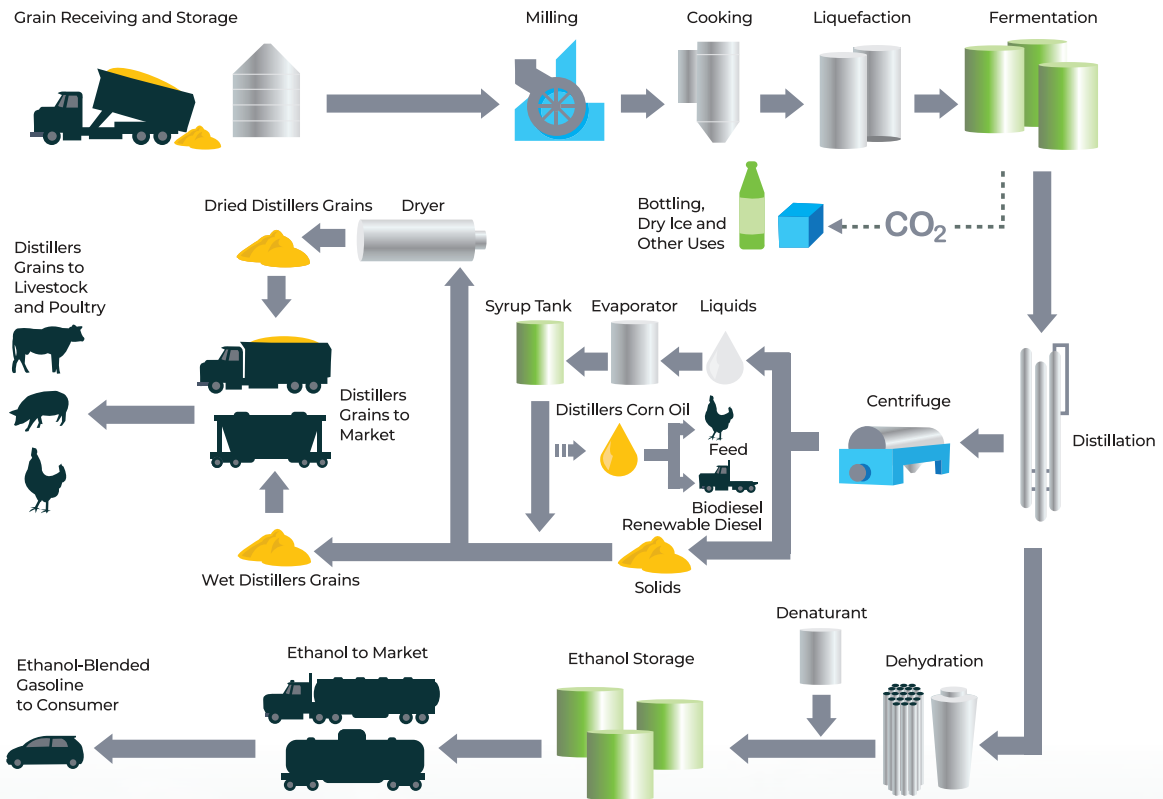
Based on average prices and product yields in 2025, a typical dry mill ethanol plant generated approximately **\$2.25** of additional value—over **50%**—to every bushel of corn processed.

Source: RFA based on U.S. Dept. of Agriculture data. Estimate based on Jan.-Nov. 2025 price data

Corn Cost per Bushel: **\$4.27**

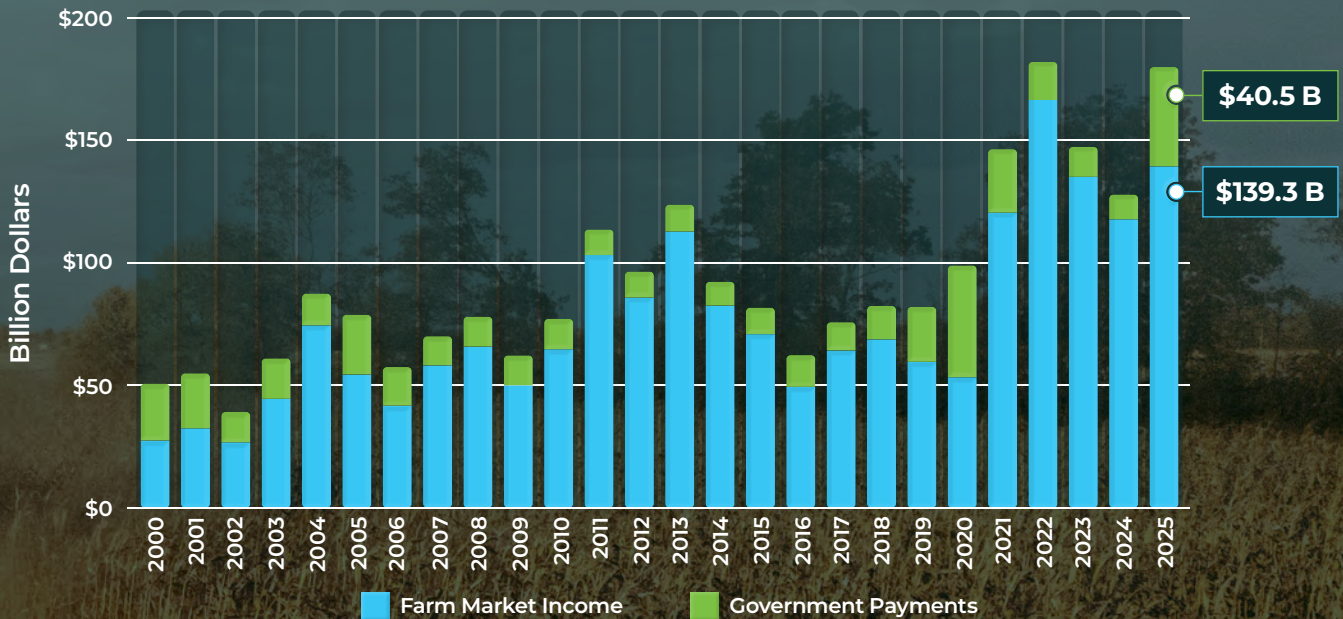


# DRY MILL ETHANOL PROCESS



Source: RFA

## NET FARM INCOME



Source: RFA, based on U.S. Dept. of Agriculture data

# RAISING THE STANDARD

## RFS GOALS



Energy Security



A Stronger Farm Economy



Cleaner Air



Fuel Choice and Diversification

## SURVEY SAYS...

A December 2025 survey of registered voters found that nearly seven in 10 (69%) support the Renewable Fuel Standard, its highest rating ever in nearly a decade of polling by Morning Consult for RFA.

**The Renewable Fuel Standard has always rested on a clear and compelling foundation: When given certainty and fair access to the market, American-made renewable fuels can deliver cleaner air, stronger rural economies, enhanced energy security, and true fuel choice for consumers.**

From its earliest years, the RFS provided the long-term confidence needed for rural communities, small businesses, and energy companies alike to invest in building a new, high-tech renewable fuel industry from the ground up. Farmers partnered with local lenders to build ethanol plants in their communities, while grain processors, transportation firms, fuel marketers, and technology innovators committed substantial capital to renewable fuel infrastructure and distribution networks.

Over time, the program has delivered on every one of its aims. And contrary to claims that the RFS “distorts” markets, the program has opened them—introducing long-overdue competition

into a fuel system historically dominated by petroleum. By ensuring renewable fuels can access a marketplace that would otherwise be closed to new entrants, the RFS remains as vital today as when it was first enacted.

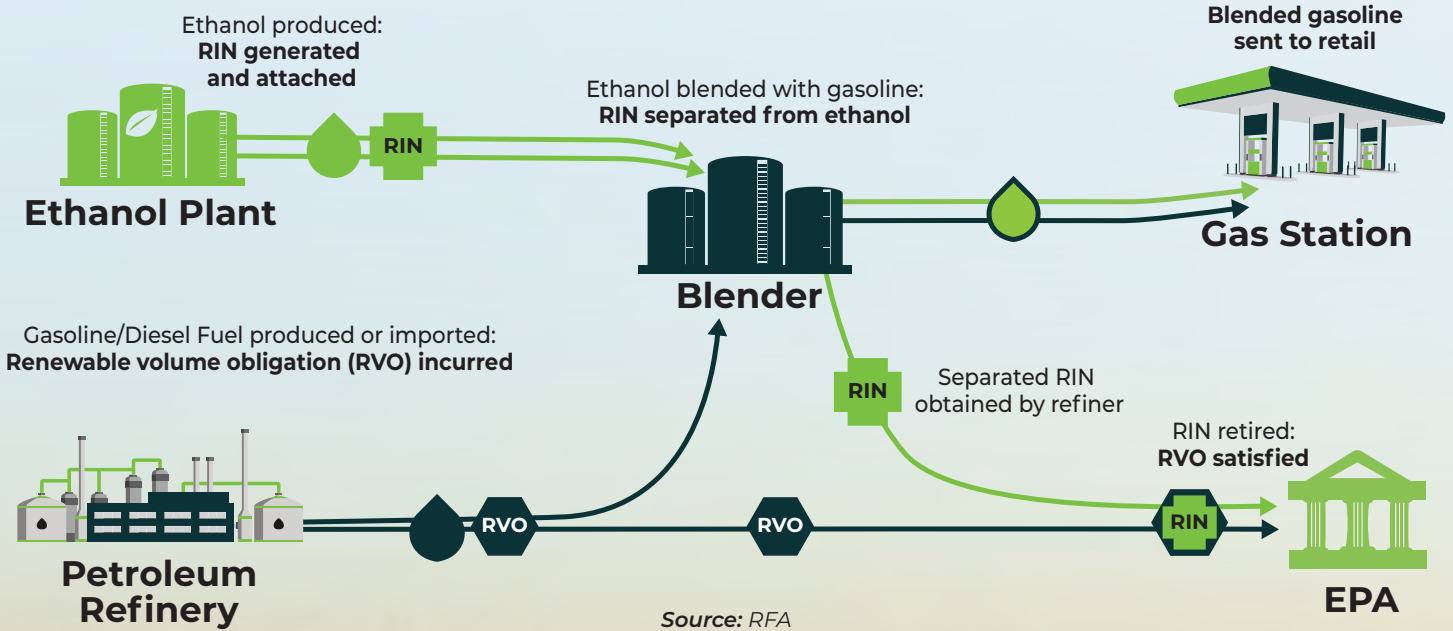
As we begin a new year, that importance only grows. EPA is charting a new course for the RFS in 2026 and 2027, with the goals of American energy dominance and bolstering farm communities now in the spotlight. And it remains crucially important that those goals are not undermined by small refinery exemptions or other questionable waivers that undermine the purpose of the RFS.

In this evolving policy environment, predictable implementation and a level playing field for American producers remain essential for continued growth.

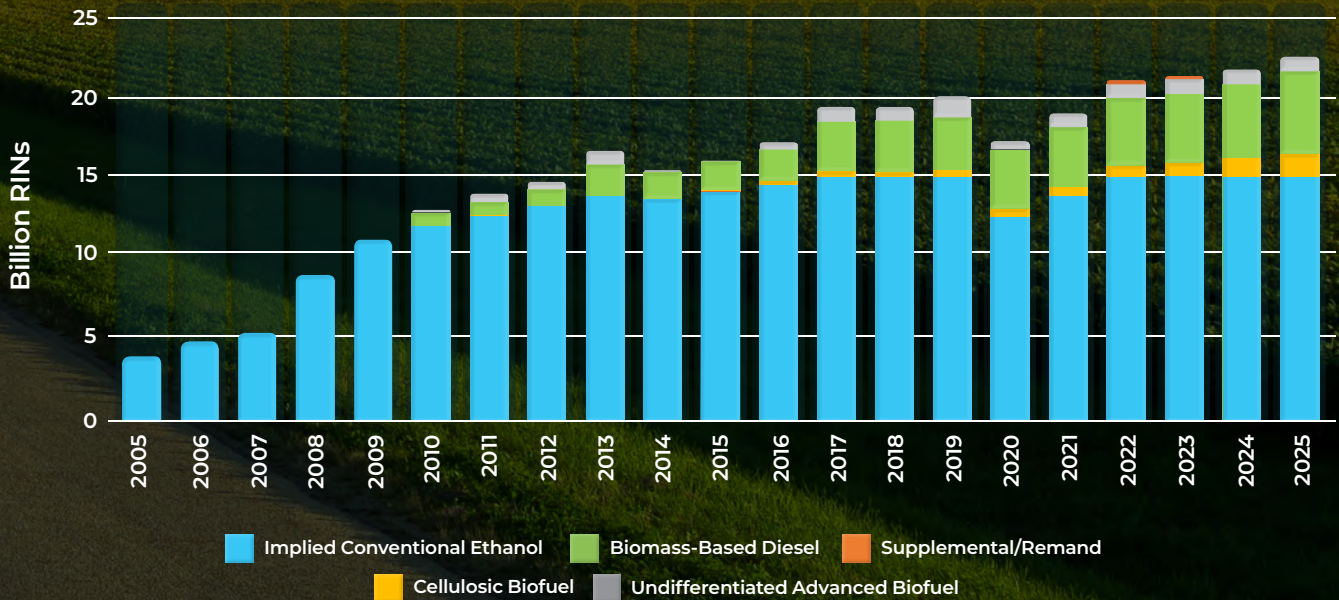
The RFS isn't finished. Its next chapter will prioritize a more secure domestic energy mix, greater use of homegrown renewable fuels in higher blends, expanded opportunity for farmers and rural communities, and stronger market competition and affordability at the pump—just as Congress intended.

A RIN, or renewable identification number, is a numbered credit generated by renewable fuel producers. Obligated parties to the RFS acquire RINs when they purchase and blend renewable fuel and then turn them in to the EPA to demonstrate compliance with their renewable volume obligation. RINs are tradeable: Obligated parties who blend less than their required share of renewable fuels may purchase RINs from other parties who have blended more.

## RIN LIFECYCLE



## FINAL ENFORCED RENEWABLE VOLUME OBLIGATIONS



Source: RFA, based on U.S. Environmental Protection Agency data



# INCENTIVIZING INNOVATION

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The clean-fuel tax incentives enacted in recent years reflect a clear national priority: **Strengthening America's domestic energy supply while encouraging the production of cleaner, more efficient fuels made here at home.**

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With the Clean Fuel Production Credit (45Z) taking effect in 2025, the United States is poised to expand the role of American-grown feedstocks and domestically produced low-emission fuels in meeting the nation's energy, economic, and security needs. As a brand-new incentive, 45Z continues to progress through the rulemaking and guidance process, and many of its operational details are still being clarified. Ethanol producers began to work with the credit for the first time in 2025, incorporating it into business planning and evaluating how it will shape investment decisions throughout its duration.

For renewable fuel producers, 45Z represents an opportunity to stimulate further efficiency

gains, agricultural productivity, and technological improvements. The credit is structured to recognize cleaner production pathways, support facility-level improvements, and reward measurable reductions in lifecycle greenhouse gas emissions.

Alongside 45Z, the 45Q credit for carbon capture and utilization pathways remains an important tool for reinforcing energy stability and operational flexibility. For biorefineries, 45Q offers an additional means to improve environmental performance and diversify revenue streams, further anchoring domestic fuel production in rural communities.

As Treasury and other federal agencies finalize rules governing eligibility, lifecycle modeling,

verification requirements, feedstock tracing, and credit interactions, producers will continue adapting to the new framework. Ongoing regulatory updates in 2026 and beyond will define how these tax incentives function in practice and how reliably producers can incorporate them into long-term strategies.

The intent of 45Z and related incentives is clear: **Stronger markets for American-made fuels, more resilient rural economies, enhanced national energy security, and steady progress in reducing greenhouse gas emissions. As these credits take hold, they have the power to shape a more reliable, affordable, and domestically sourced energy future.**

# TAX CREDITS EXPLAINED

**The Carbon Capture Tax Credit (45Q)** provides a performance-based tax credit for carbon management projects that capture carbon oxides (carbon dioxide and carbon monoxide) from eligible industry and power facilities and directly from the atmosphere. The 45Q tax credit can be claimed when an eligible project has securely stored the captured carbon dioxide in appropriate dedicated geologic formations, including saline or other geologic formations, or oil and gas fields; or reused the captured CO<sub>2</sub> or carbon monoxide as a feedstock to produce low- and zero-embodied carbon products such as fuels, chemicals, and building materials.

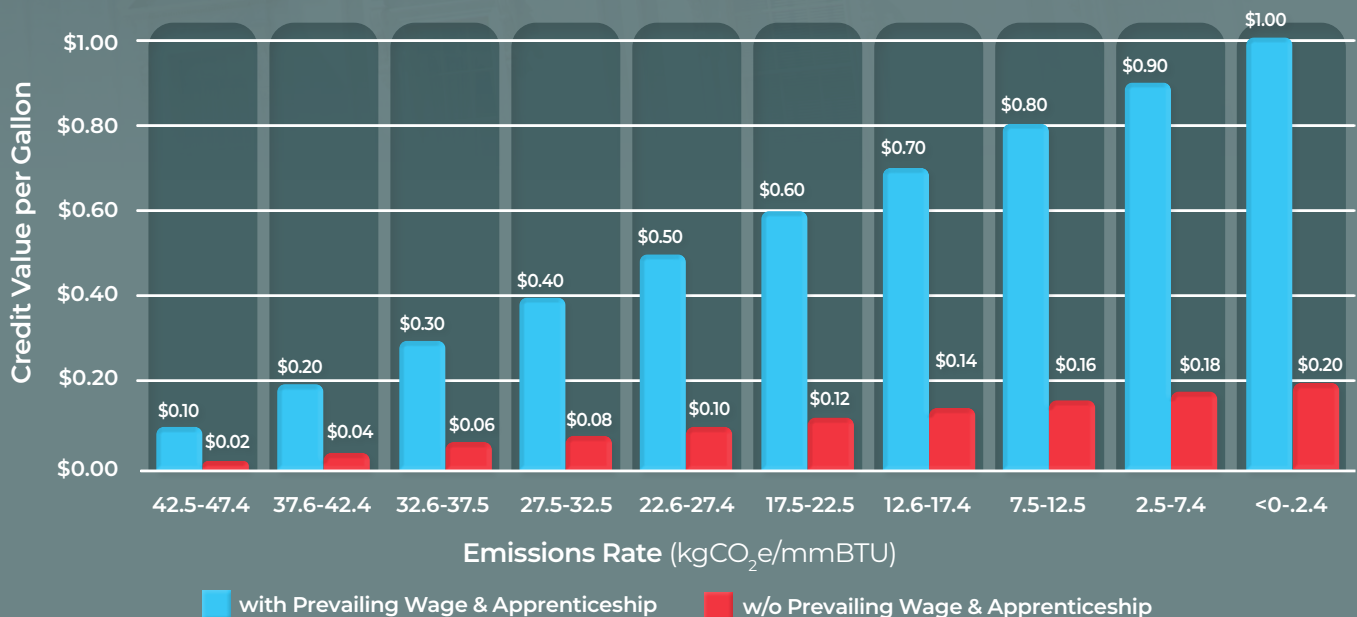
Created in the 2022 Inflation Reduction Act, the **Clean Fuel Production Credit (45Z)** is meant to stimulate investment in production of lower-carbon fuels, especially for sustainable aviation fuel. It provides a credit worth \$0.10–\$1.00 per gallon for non-aviation fuels based on carbon intensity for 2025–2027 tax years, and \$0.18–\$1.75 per gallon for aviation fuels. Producers must meet prevailing wage and apprenticeship requirements (PWA) or credit values are cut by 80%. The One Big Beautiful Bill Act extended the credit through 2031; removed indirect land-use change emissions from emissions rates; prohibited fuels made from crops not grown in the U.S., Canada, or Mexico; removed the SAF premium; and eliminated “transferability” after 2027.

# IMPROVING 45Z

RFA urges Congress and the Trump administration to work together to establish a fair, transparent, and forward-looking fuel tax credit framework. Specifically, RFA urges the following improvements to the 45Z provision:

- **Make prevailing wage and apprenticeship requirements more workable for an established industry with stable employment and contractor relationships**
- **Incorporate farming practices into 45Z and enable book-and-claim tracking for better supply chain flexibility and transparency**
- **Congress should consider more effective approaches for stimulating alcohol-to-jet (sustainable aviation fuel) production**
- **Ensure policy follows science to maximize emissions reductions and innovation**

## 45Z CREDIT VALUES



Source: RFA



# ETHANOL BY AIR & SEA

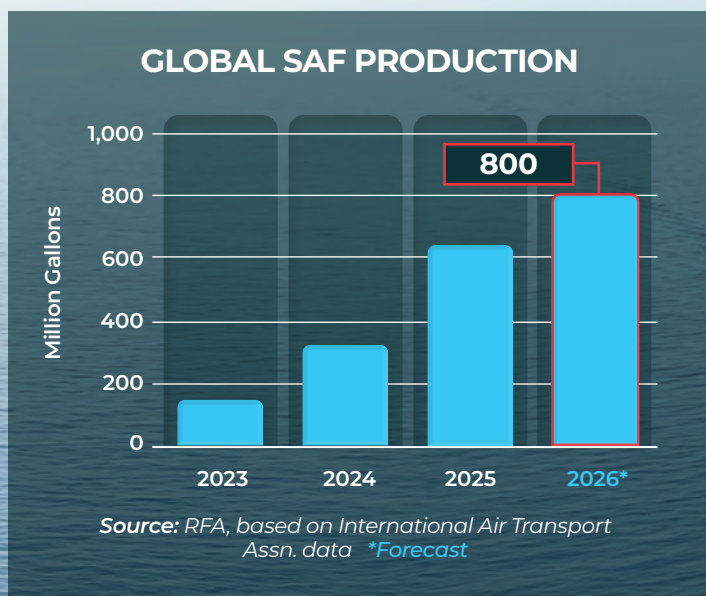
## WHEELS UP

Aviation represents potentially the most difficult industry to decarbonize. Jet fuel is energy dense, performance-based, and safety critical. Today, and in the foreseeable future, there is simply no substitute for liquid fuels at speed and altitude. In 2025, global sustainable aviation fuel (SAF) production nearly doubled from 334 million gallons to just over 634 million gallons, according to the International Air Transport Association (IATA).

This increase still represents just 0.6 percent of total jet fuel consumption, and 2026 projections estimate SAF production at just 800 million gallons, falling below estimates to stay on track with the SAF Grand Challenge, which endeavors to support 3 billion gallons of U.S. SAF production by 2030. However, SAF demand from airlines remains strong, although price sensitive, as they continue to prioritize reducing emissions from the aviation sector.

Further action by the ethanol industry can drive down the carbon intensity of alcohol-to-jet (AtJ) feedstock by applying carbon capture, utilization and sequestration where available, and operational upgrades increasing plant efficiency.

RFA member LanzaJet announced in November 2025 that it has fully operated and produced ethanol-based SAF at its LanzaJet Freedom Pines Fuels facility in Georgia, marking both the world's first production of jet fuel using ethanol as a feedstock at a commercial-scale plant, and the first non-oil-based renewable solution compatible with today's aircraft.





## MARITIME MOMENTUM

The global maritime fleet uses an estimated 80 billion gallons of fuel annually. Today, most of this is comprised of light/heavy fuel oils, diesel and liquefied natural gas, with alternative fuels playing a small (less than 1%) but increasingly important role in the future maritime fuel profile.

Indeed, ethanol is gaining momentum as a practical, cost-effective marine fuel. Manufacturers of marine engines like Everllence, WinGD and Wärtsilä are investing in dual-fuel ethanol-powered engines and conducting sea trials. These initiatives speak to ethanol's potential to deliver cleaner burning fuel at a lower cost while future-proofing the global fleet. That means American ethanol might soon fuel ships crossing oceans, anchoring U.S. agriculture, and strengthening global trade.

To speed the introduction of ethanol as a maritime fuel, RFA is leading, along with the American Biogas Council, the new American Biofuels Maritime Initiative.

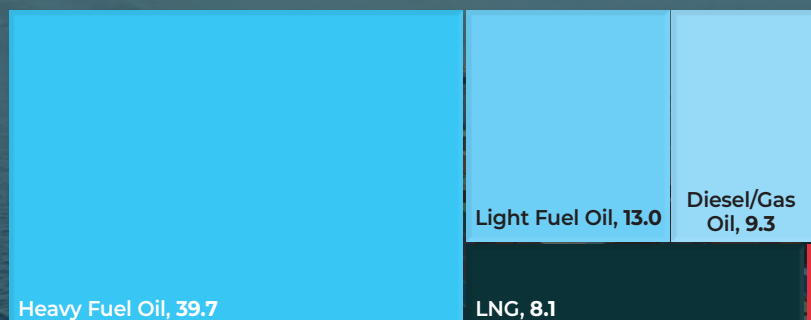


In December 2025, Maersk said it would blend 50% ethanol with 50% methanol in a test onboard the vessel Laura Mærsk. An earlier trial, conducted in October and November, involved a 10% ethanol / 90% e-methanol blend and confirmed that ethanol can be safely and effectively integrated into the fuel mix. Beyond the upcoming E50 test, Maersk plans to conduct a trial using 100% ethanol.

## MARINE FUEL OFFERS AN ENORMOUS NEW MARKET OPPORTUNITY FOR U.S. ETHANOL AND AGRICULTURE

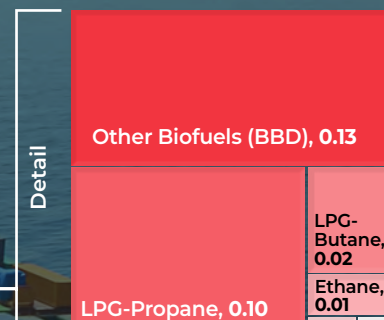
2023 Global Marine Fuel Consumption in  
5,000+ Gross Tonnage Ships  
(Billion Gallons)

**Total = 70.4 BG**



2023 Global Alternative  
Marine Fuel Consumption  
(Billion Gallons)

**Total = 0.3 BG**



Detail

Ethane, 0.01

Ethanol, 0.001

Alternative Fuels, 0.3

Methanol, 0.002

Source: RFA

# INDUSTRY ECONOMICS

After setting new records for production and exports in 2024, the U.S. ethanol industry eclipsed those marks in 2025 and pushed further into record territory. Annual ethanol production reached **16.4 billion** gallons, an increase of **nearly 200 million** gallons over 2024. On a weekly basis, the industry hit record output levels in June and again in the fall, proving the ability to produce **well over 17 billion** gallons.

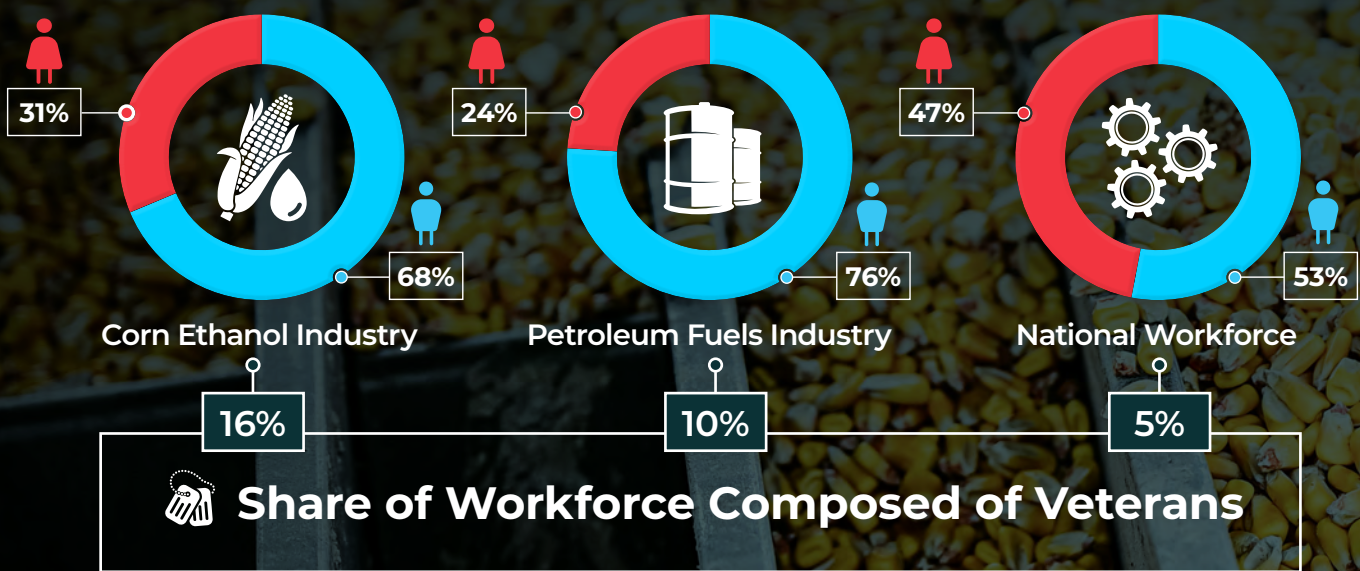
The demand growth that supported this output expansion occurred primarily in the export market. After setting a record in 2024, shipments to foreign destinations increased an additional **200 million**

gallons in 2025 to a new high-water mark of **2.2 billion** gallons. Meanwhile, domestic ethanol consumption was relatively stable, as a higher ethanol blend rate (i.e., the average ethanol content in gasoline) offset lower gasoline consumption.

Ethanol remained competitive in domestic and international fuel markets, as production costs increased only incrementally from the lows of 2024. Corn prices remained subdued, as the U.S. harvested a crop that was **more than a billion** bushels larger than the previous high-water mark.

Although conditions remained challenging for corn growers, record levels of ethanol production and corn exports provided badly needed outlets for large grain supplies. Approximately **5.5 billion** bushels of corn worth **\$24 billion** were processed into ethanol.

## Workforce Demographics



Source: U.S. Department of Energy data

# ETHANOL AND THE 2025 ECONOMY

The ethanol industry's contribution to the U.S. economy **increased moderately** from 2024, given rising production and slightly higher prices for most ethanol-related commodities. The industry made substantial contributions to U.S. gross domestic product and household incomes and supported hundreds of thousands of jobs. Its impact was most pronounced in the agriculture sector, providing a vital source of demand in a year when crop growers faced margin pressure and evolving trade policy.

The industry is a natural fit for workers passionate about a strong agriculture sector and in bolstering America's energy security. In fact, veterans account for 16 percent of the ethanol workforce, a higher share than in any other segment of the U.S. energy sector—notably, 60 percent above the petroleum industry—and more than three times the national workforce average.

Moreover, the industry's economic impact can continue to grow. According to an analysis conducted by RFA jointly with the National Corn Growers Association, if E15 were fully adopted in the United States on a nationwide, year-round basis, it would generate an additional \$25.8 billion in GDP and \$10.3 billion in incomes, while supporting an additional 128,000 full-time equivalent jobs.



**79,228**  
Direct Jobs



**237,292**  
Indirect/Induced Jobs



**\$28.3 Billion**  
Household Income

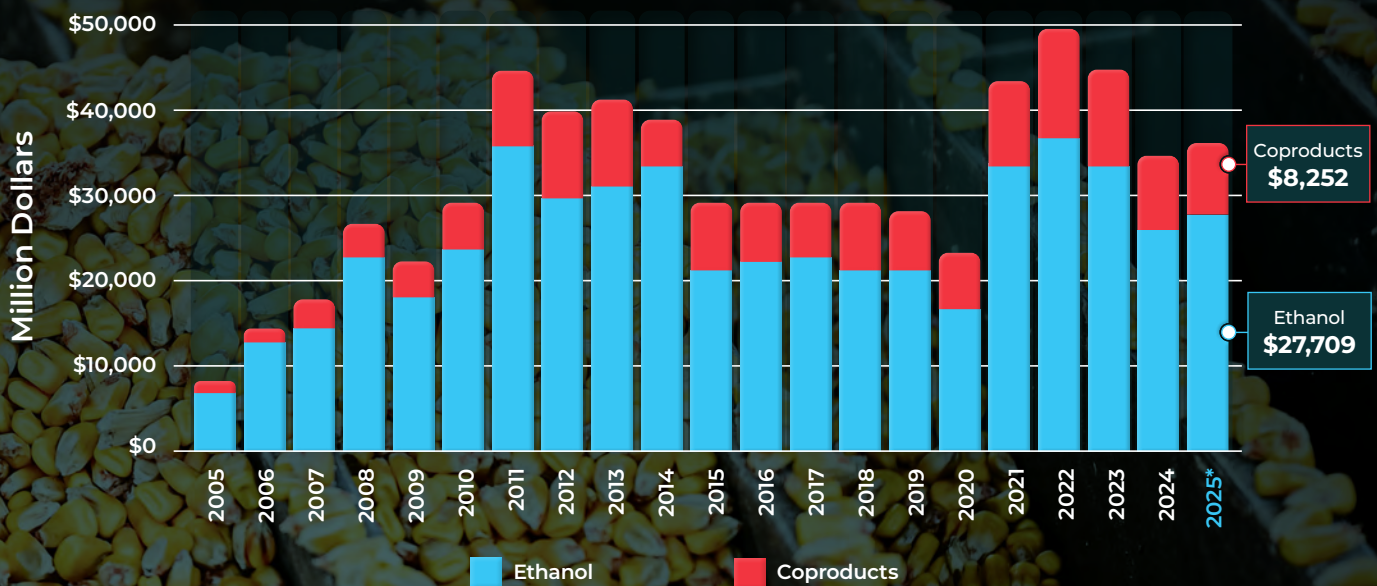


**\$50.4 Billion**  
GDP Contribution



**\$9.0 Billion**  
Tax Revenues

## GROSS VALUE OF U.S. ETHANOL INDUSTRY OUTPUT



Source: U.S. Department of Energy \*Forecast

# A HEALTHIER FUEL OPTION

Many Americans are taking a fresh look at health and wellness issues and are exploring new ways for their families to live better, healthier lives. Choosing ethanol-blended fuels is a simple way for Americans to improve human health and better the environment for their families and neighbors. Ethanol has a major role to play in securing cleaner air, cleaner water, and healthier soils.

Tailpipe emissions such as carbon monoxide, hydrocarbons, nitrogen oxides, and fine particulate matter are linked to a number of health issues, including lung disease and respiratory conditions, heart problems, cancer, and other illnesses. Adding ethanol to gasoline dilutes and displaces the most harmful gasoline components—like sulfur, benzene, toluene, and xylene—that are major contributors to smog formation. Because oxygen-rich ethanol is a cleaner-burning fuel, its use directly lowers the emissions that create urban haze and poor air quality.

The Hormel Institute, in collaboration with the University of Minnesota and the University of Illinois Chicago, found that increasing the use of ethanol reduces carcinogenic exposure, thereby decreasing cancer risk for American families.

## Switching from E10 to E15 reduces:

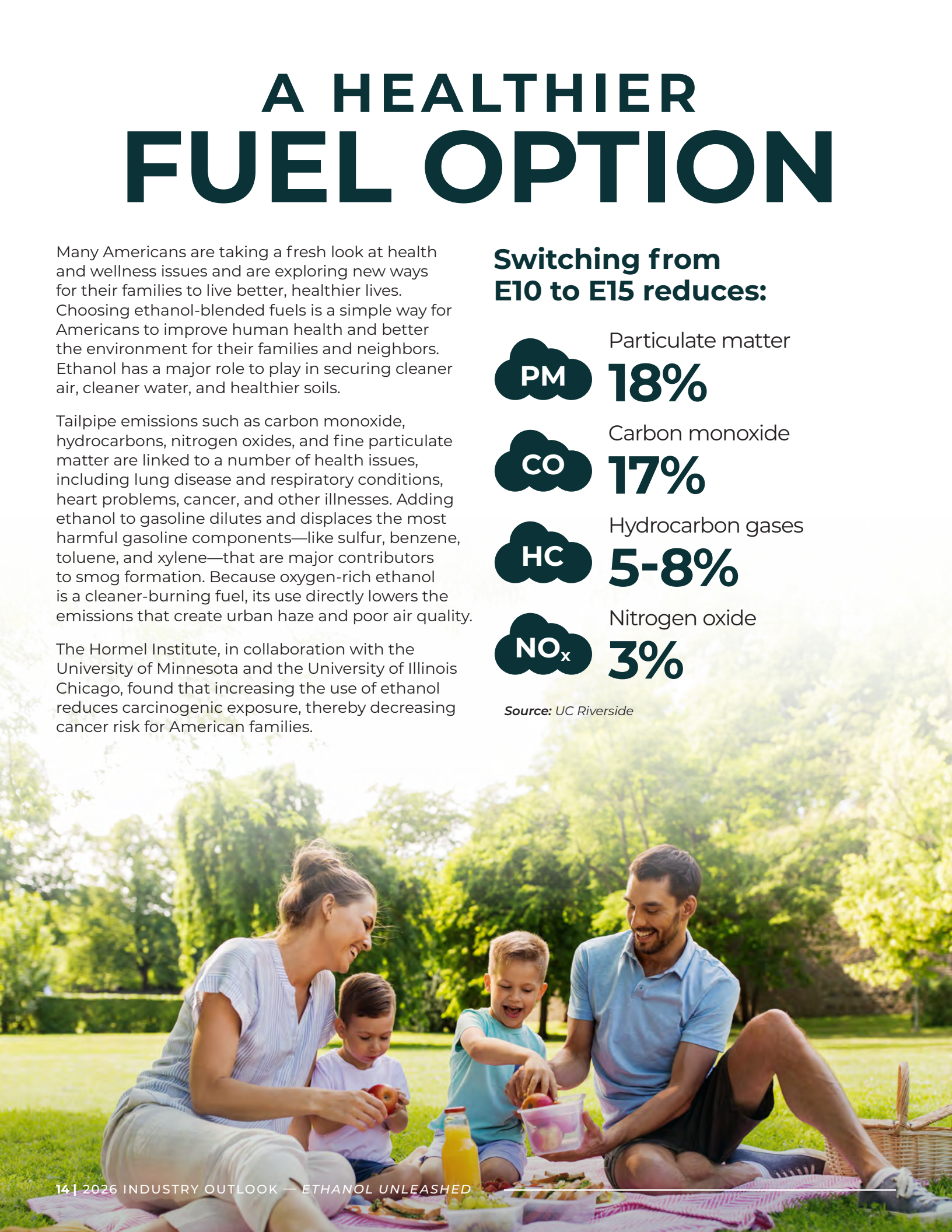
Particulate matter  
**PM 18%**

Carbon monoxide  
**CO 17%**

Hydrocarbon gases  
**HC 5-8%**

Nitrogen oxide  
**NO<sub>x</sub> 3%**

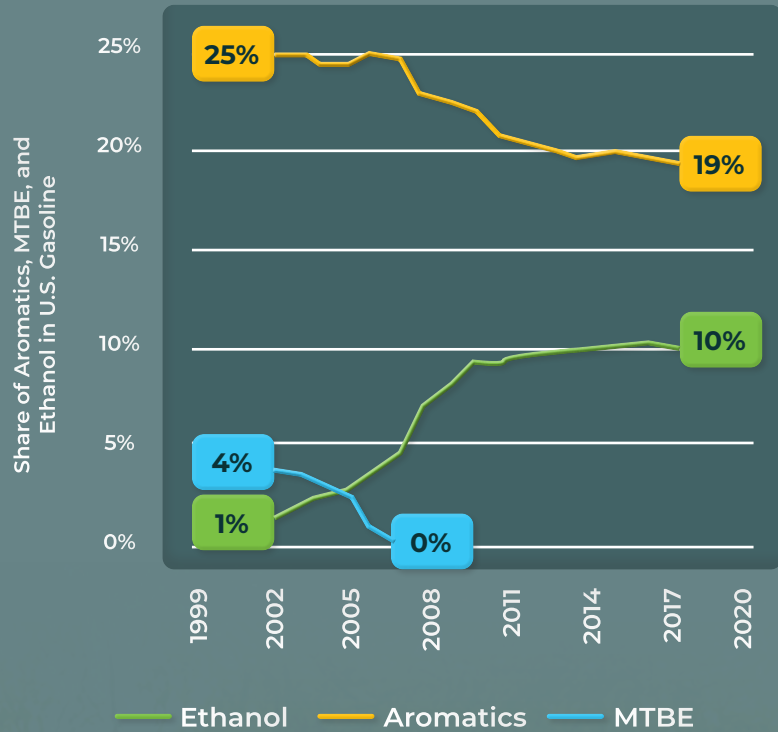
*Source: UC Riverside*



**“It is essential to reduce exposure to the products from burning fossil fuels to prevent breast cancer. We are studying if reducing BTEX exposure will reduce susceptibility to PAH induced breast cancer. One way to reduce BTEX compounds is to reduce exposure by adding ethanol to gasoline.”**

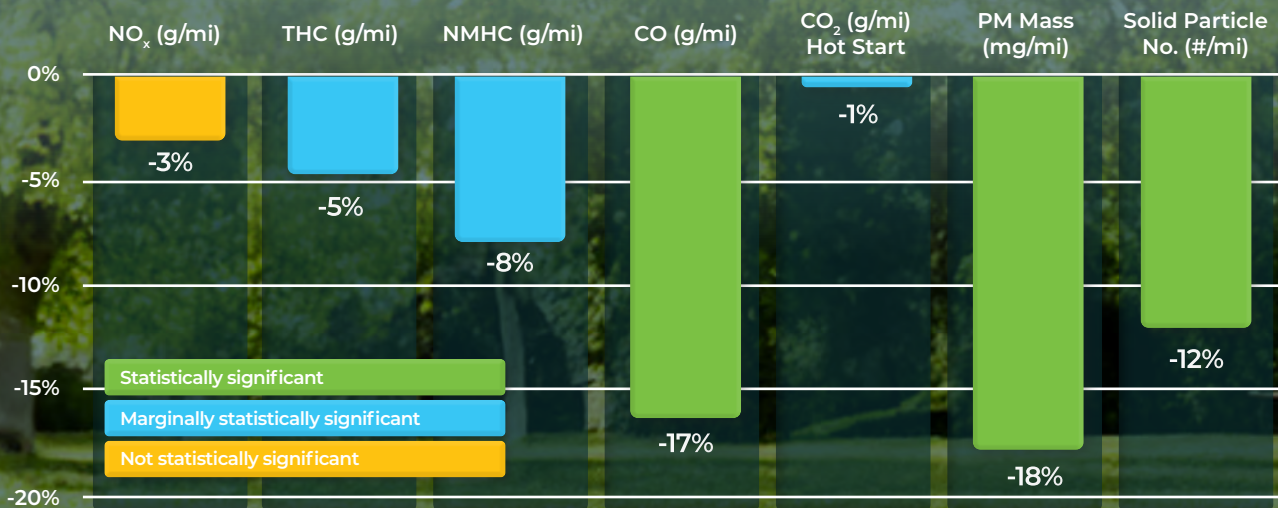
— Dr. Leena Hilakivi-Clarke, *The Hormel Institute*. BTEX refers to benzene, toluene, ethylbenzene and xylene; PAH refers to polycyclic aromatic hydrocarbons.

## MORE ETHANOL MEANS LESS HARMFUL AROMATICS AND MTBE



Source: U.S. Environmental Protection Agency

## E15 VS. E10: CHANGES IN EMISSIONS



Source: University of California, Riverside CE-CERT

Notes: Statistical significance based on least square means; NO<sub>x</sub>, THC, NMHC, CO, CO<sub>2</sub> and PM Mass results are weighted based on cold-start, hot-start, and hot-running emissions.

# THE IMPORTANCE OF OCTANE

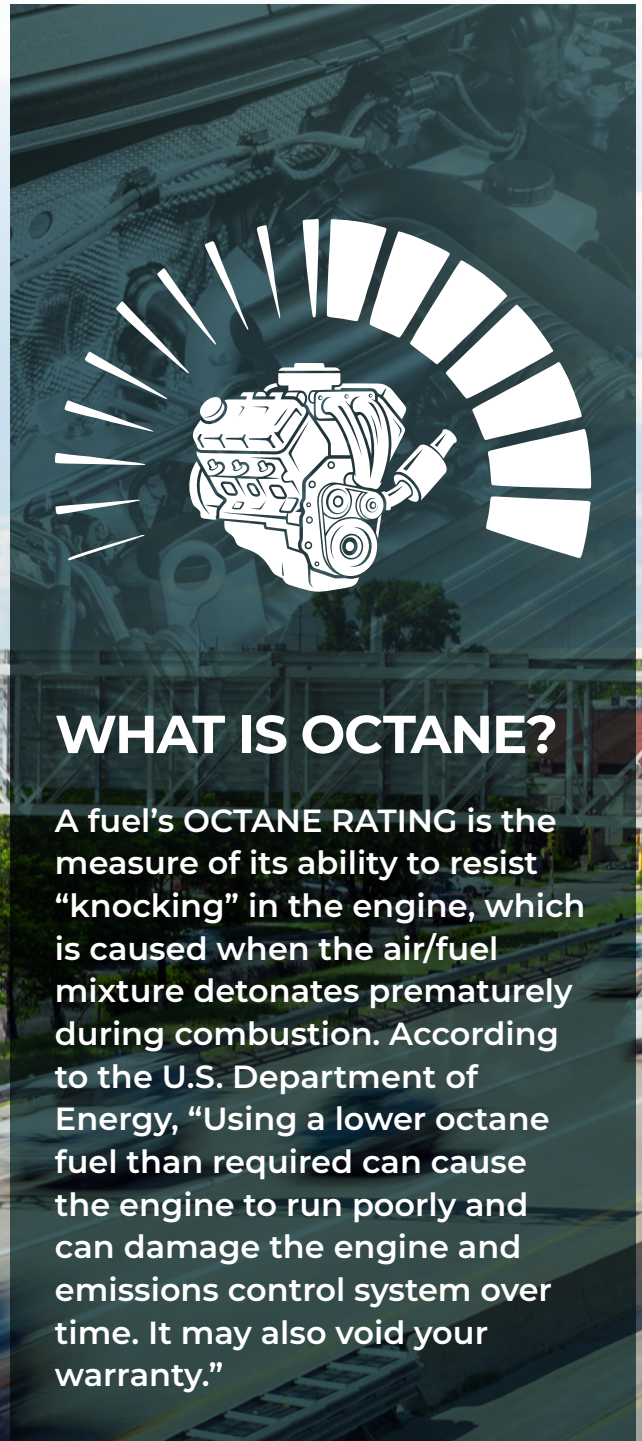
Each year, auto manufacturers produce more turbocharged, higher-compression engines that need higher-octane gasoline to operate efficiently. Currently, automakers either require or recommend premium fuel for more than half the light-duty vehicles on the market, a marketplace dynamic that demands ethanol as a clean and affordable source of octane.

Ethanol's blending octane rating of 114 is significantly higher than the ratings of the main petroleum-based octane components. Moreover, aromatic hydrocarbons such as benzene and toluene may raise octane, but they worsen air pollution and are highly toxic—that's why the use of certain aromatics is strictly limited by the U.S. Environmental Protection Agency and state agencies. In the future, raising the standard inclusion level of ethanol to 15 percent and beyond can enable refiners to further reduce their reliance on harmful aromatics to boost octane.

## ETHANOL'S OCTANE SAVES MONEY

Ethanol as an octane booster saves drivers with each fill-up. A recent analysis conducted by a former BP/Amoco refining engineer estimates the cost of refinery-derived octane to be 4.5 times higher than that of ethanol-derived octane. The analysis found that using just 10 percent ethanol to boost octane ratings reduces gasoline production costs by 39 cents per gallon. If ethanol was removed from the U.S. fuel supply, replacing its current octane contribution with refinery-produced octane would substantially increase refining costs and add \$54 billion per year to consumer spending on gasoline.

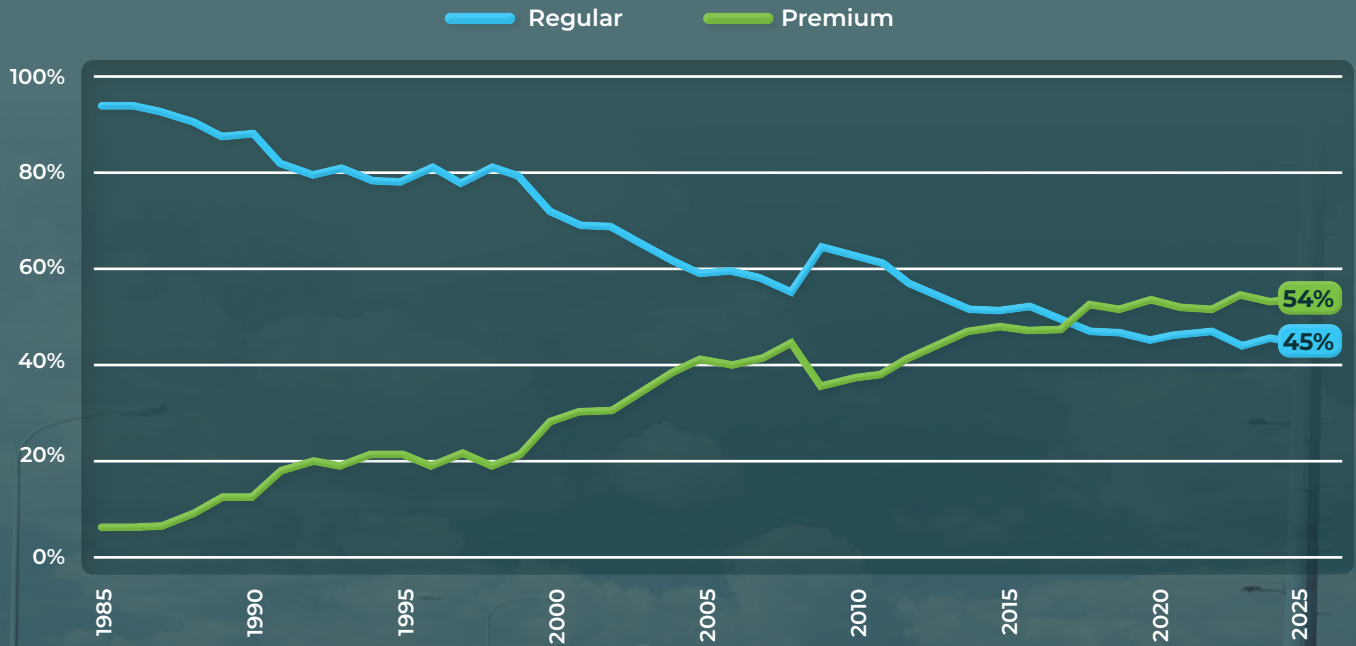
RFA continues to push for an expanded future role for high-octane, low-carbon ethanol and educate policymakers about the benefits of these fuels.



## WHAT IS OCTANE?

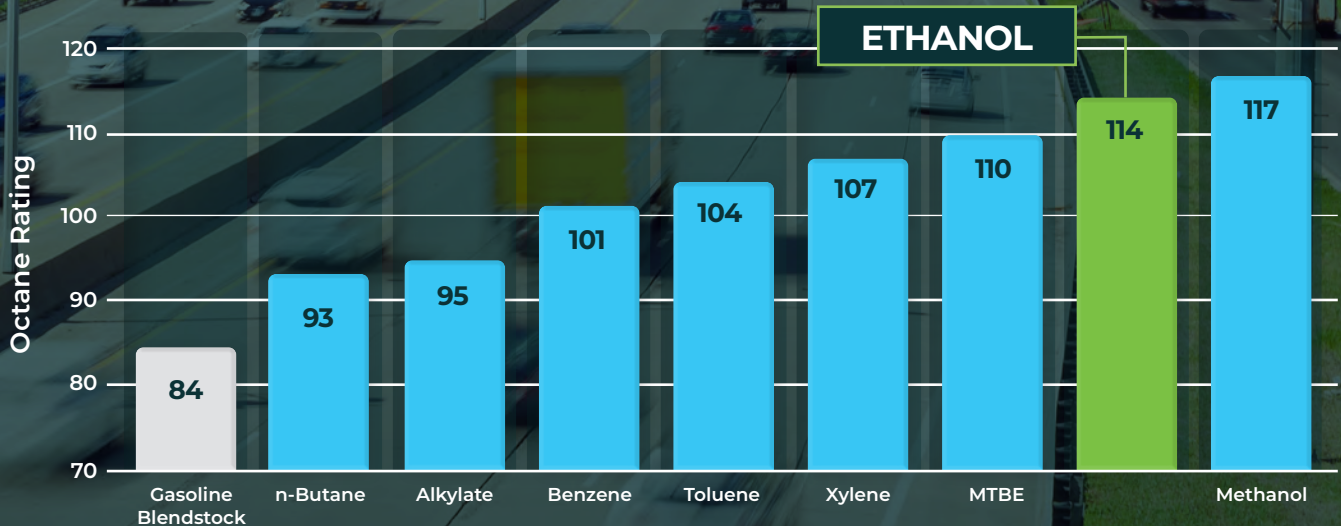
A fuel's **OCTANE RATING** is the measure of its ability to resist “knocking” in the engine, which is caused when the air/fuel mixture detonates prematurely during combustion. According to the U.S. Department of Energy, “Using a lower octane fuel than required can cause the engine to run poorly and can damage the engine and emissions control system over time. It may also void your warranty.”

## SHARE OF LIGHT-DUTY VEHICLE MODEL CONFIGURATIONS BY RECOMMENDED GASOLINE GRADES



Source: U.S. Dept. of Energy and U.S. Environmental Protection Agency Fuel Economy Guides

## BLENDED OCTANE RATING OF GASOLINE COMPONENTS



Source: U.S. Department of Energy

# 2026 U.S. ETHANOL PRODUCTION CAPACITY BY BIOREFINERY

Company	City	State	Feedstock	Production Capacity (MGY)	Capacity Under Constr. /Expansion (MGY)
Absolute Energy LLC	St. Ansgar	IA	Corn, Cellulosic Fiber	128	—
Ace Ethanol LLC	Stanley	WI	Corn, Cellulosic Fiber	54	—
Adkins Energy LLC	Lena	IL	Corn	60	—
ADM	Clinton	IA	Corn	237	—
ADM	Decatur	IL	Corn	375	—
ADM	Marshall	MN	Corn	48	—
ADM (Dry Mill)	Cedar Rapids	IA	Corn	300	—
ADM (Dry Mill)	Columbus	NE	Corn, Cellulosic Fiber	313	—
ADM (Wet Mill)	Cedar Rapids	IA	Corn	240	—
ADM (Wet Mill)	Columbus	NE	Corn	100	—
A.E. Innovation LLC	Luverne	MN	Corn	18	—
Aemetis Inc.	Keyes	CA	Corn, Sorghum	70	—
Al-Corn Clean Fuel LLC	Claremont	MN	Corn, Cellulosic Fiber	140	—
Alto Ingredients Columbia Inc.	Boardman	OR	Corn	40	—
Alto Ingredients Magic Valley Inc.	Burley	ID	Corn	60	—
Alto Ingredients Pekin ICP Inc.	Pekin	IL	Corn	90	—
Alto Ingredients Pekin Inc. (Dry Mill)	Pekin	IL	Corn	60	—
Alto Ingredients Pekin Inc. (Wet Mill)	Pekin	IL	Corn	100	—
Amber Wave	Phillipsburg	KS	Wheat Byproducts	50	—
Arkalon Energy LLC	Liberal	KS	Corn, Sorghum, Cellulosic Crop Residue	120	—
Aztalan Bio LLC	Jefferson	WI	Corn	108	—
Badger State Ethanol LLC	Monroe	WI	Corn, Cellulosic Fiber	81	—
Benchmark Renewable Energy LLC	Raeford	NC	Corn	62	—
BI Biorefinery LLC	Grand Forks	ND	Food/Beverage/CPG Waste	17	—
Big River Resources Boyceville LLC	Boyceville	WI	Corn	64	—
Big River Resources Galva LLC	Galva	IL	Corn	129	—
Big River Resources West Burlington LLC	West Burlington	IA	Corn	113	—
Big River United Energy LLC	Dyersville	IA	Corn	130	—
BioUrja Renewables LLC	Peoria	IL	Corn	135	—
Bonanza BioEnergy LLC	Garden City	KS	Corn, Sorghum	70	—
Bridgeport Ethanol LLC	Bridgeport	NE	Corn	55	—
Bushmills Ethanol Inc.	Atwater	MN	Corn	90	—
Calgren Renewable Fuels LLC	Pixley	CA	Corn, Sorghum, Cellulosic Fiber	55	—
Carbon Green BioEnergy LLC	Lake Odessa	MI	Corn	55	—
Cardinal Colwich LLC	Colwich	KS	Corn	70	—
Cardinal Ethanol LLC	Union City	IN	Corn	135	—
Cargill Inc.	Blair	NE	Corn	210	—
Cargill Inc.	Eddyville	IA	Corn	71	—
Cargill Inc.	Fort Dodge	IA	Corn	130	—
Chief Ethanol Fuels Inc.	Hastings	NE	Corn, Cellulosic Fiber	75	—
Chief Ethanol Fuels Inc.	Lexington	NE	Corn, Cellulosic Fiber	48	—
Chippewa Valley Ethanol Co.	Benson	MN	Corn, Cellulosic Fiber	50	—
CHS Inc.	Annawan	IL	Corn	130	—
CHS Inc.	Rochelle	IL	Corn	138	—
CIE	Marion	IN	Corn	55	—
CIE	Norfolk	NE	Corn	50	—
Commonwealth Agri-Energy LLC	Hopkinsville	KY	Corn	50	—
CORN LP	Goldfield	IA	Corn, Cellulosic Fiber	75	—
Crysalis Biosciences Inc.	Sauget	IL	Corn	55	—
Dairy Distillery Alliance LLC	Constantine	MI	Food/Beverage/CPG Waste	-	2
Dakota Ethanol LLC	Wentworth	SD	Corn, Cellulosic Fiber	100	—
DENCO II LLC	Morris	MN	Corn, Cellulosic Fiber	36	—
Diamond Ethanol LLC	Levelland	TX	Corn, Sorghum	45	—

Company	City	State	Feedstock	Production Capacity (MGY)	Capacity Under Constr. /Expansion (MGY)
Didion Ethanol LLC	Cambria	WI	Corn	50	—
Dynamic Recycling LLC	Bristol	TN	Food/Beverage/CPG Waste	5	—
E Energy Adams LLC	Adams	NE	Corn, Cellulosic Fiber	100	—
East Kansas Agri-Energy LLC	Garnett	KS	Corn, Cellulosic Fiber	45	—
Elite Octane LLC	Atlantic	IA	Corn, Cellulosic Fiber	150	—
Fox River Valley Ethanol LLC	Oshkosh	WI	Corn	65	—
Front Range Energy LLC	Windsor	CO	Corn	45	—
Glacial Lakes Energy LLC	Aberdeen	SD	Corn, Cellulosic Fiber	65	—
Glacial Lakes Energy LLC	Huron	SD	Corn	40	—
Glacial Lakes Energy LLC	Mina	SD	Corn	162	—
Glacial Lakes Energy LLC	Watertown	SD	Corn, Cellulosic Fiber	148	—
Golden Grain Energy LLC	Mason City	IA	Corn, Cellulosic Fiber	120	—
Golden Triangle Energy LLC	Craig	MO	Corn	20	—
Grain Processing Corp.	Muscatine	IA	Corn	83	—
Grain Processing Corp.	Washington	IN	Corn	37	—
Granite Falls Energy LLC	Granite Falls	MN	Corn	63	—
Green Plains Central City LLC	Central City	NE	Corn	130	—
Green Plains Fairmont LLC	Fairmont	MN	Corn	120	—
Green Plains Madison LLC	Madison	IL	Corn	95	—
Green Plains Mount Vernon LLC	Mount Vernon	IN	Corn	90	—
Green Plains Otter Tail LLC	Fergus Falls	MN	Corn	60	—
Green Plains Shenandoah LLC	Shenandoah	IA	Corn	95	—
Green Plains Superior LLC	Superior	IA	Corn	65	—
Green Plains Wood River LLC	Wood River	NE	Corn	121	—
Green Plains York LLC	York	NE	Corn	55	—
GreenAmerica Biofuels Ord LLC	Ord	NE	Corn	65	—
Greenfield Global Inc.	Winnebago	MN	Corn	48	—
Guardian Energy LLC	Janesville	MN	Corn, Cellulosic Fiber	160	—
Guardian Hankinson LLC	Hankinson	ND	Corn, Cellulosic Fiber	150	—
Guardian Lima LLC	Lima	OH	Corn, Cellulosic Fiber	75	—
Harvestone Low Carbon Partners	Rensselaer	IN	Corn	60	—
Harvestone Low Carbon Partners	Spiritwood	ND	Corn	80	—
Harvestone Low Carbon Partners	Underwood	ND	Corn	75	—
Heartland Corn Products	Winthrop	MN	Corn, Cellulosic Fiber	150	—
Hereford Ethanol Partners LP	Hereford	TX	Corn, Sorghum, Cellulosic Fiber	120	—
Heron Lake BioEnergy LLC	Heron Lake	MN	Corn	68	—
Highwater Ethanol LLC	Lamberton	MN	Corn, Cellulosic Fiber	70	—
Homeland Energy Solutions LLC	Lawler	IA	Corn, Cellulosic Fiber	200	—
Husker Ag LLC	Plainview	NE	Corn, Cellulosic Fiber	110	—
KAAPA Ethanol LLC	Minden	NE	Corn, Cellulosic Fiber	83	—
KAAPA Ethanol Ravenna LLC	Ravenna	NE	Corn	135	—
KAAPA Partners Aurora LLC	Aurora	NE	Corn, Cellulosic Fiber	130	—
Kansas Ethanol LLC	Lyons	KS	Corn, Sorghum, Cellulosic Fiber	80	—
LifeLine Biofuels	St. Joseph	MO	Corn	50	—
Lincolnland Agri-Energy LLC	Palestine	IL	Corn	60	—
Lincolnway Energy LLC	Nevada	IA	Corn, Cellulosic Fiber	90	—
Little Sioux Corn Processors LLC	Marcus	IA	Corn, Cellulosic Fiber	165	—
Louis Dreyfus Grand Junction LLC	Grand Junction	IA	Corn, Cellulosic Fiber	125	—
Marquis Energy LLC	Hennepin	IL	Corn, Cellulosic Fiber	400	—
Marysville Ethanol LLC	Marysville	MI	Corn	55	—
MGP Ingredients Inc.	Atchison	KS	Corn	3	—
Mid America Agri Products/Wheatland LLC	Madrid	NE	Corn, Cellulosic Fiber	48	—
Mid-Missouri Energy LLC	Malta Bend	MO	Corn, Cellulosic Fiber	60	—
Midwest Renewable Energy LLC	Sutherland	NE	Corn	26	—
MXI Environmental Services LLC	Abingdon	VA	Food/Beverage/CPG Waste	2	—

Company	City	State	Feedstock	Production Capacity (MGY)	Capacity Under Constr. /Expansion (MGY)
Nebraska Corn Processing LLC	Cambridge	NE	Corn	50	—
Nesika Energy LLC	Scandia	KS	Corn	10	—
Net-Zero Richardton LLC	Richardton	ND	Corn, Cellulosic Fiber	65	—
New Energy Blue LLC	Mason City	IA	Cellulosic Crop Residue	—	21
NuGen Energy LLC	Marion	SD	Corn, Sorghum	150	—
One Earth Energy LLC	Gibson City	IL	Corn	150	50
Parallel Products of California	Rancho Cucamonga	CA	Food/Beverage/CPG Waste	2	—
Parallel Products of Kentucky	Louisville	KY	Food/Beverage/CPG Waste	5	—
Pelican Renewables LLC	Stockton	CA	Corn, Sorghum, Food/Beverage/CPG Waste	60	—
Pennsylvania Grain Processing LLC	Clearfield	PA	Corn	120	—
Pinal Energy LLC	Maricopa	AZ	Corn	55	—
Pine Lake Corn Processors LLC	Steamboat Rock	IA	Corn	88	—
Plymouth Energy LLC	Merrill	IA	Corn	65	—
POET Bioprocessing - Alexandria LLC	Alexandria	IN	Corn, Cellulosic Fiber	90	—
POET Bioprocessing - Arthur LLC	Arthur	IA	Corn, Cellulosic Fiber	132	—
POET Bioprocessing - Ashton LLC	Ashton	IA	Corn, Cellulosic Fiber	68	—
POET Bioprocessing - Big Stone LLC	Big Stone City	SD	Corn, Cellulosic Fiber	105	—
POET Bioprocessing - Bingham Lake LLC	Bingham Lake	MN	Corn, Cellulosic Fiber	35	—
POET Bioprocessing - Caro LLC	Caro	MI	Corn, Cellulosic Fiber	80	—
POET Bioprocessing - Chancellor LLC	Chancellor	SD	Corn, Cellulosic Fiber	125	—
POET Bioprocessing - Cloverdale LLC	Cloverdale	IN	Corn, Cellulosic Fiber	95	—
POET Bioprocessing - Coon Rapids LLC	Coon Rapids	IA	Corn, Cellulosic Fiber	65	—
POET Bioprocessing - Corning LLC	Corning	IA	Corn, Cellulosic Fiber	90	—
POET Bioprocessing - Emmetsburg LLC	Emmetsburg	IA	Corn, Cellulosic Fiber	68	—
POET Bioprocessing - Fairbank LLC	Fairbank	IA	Corn, Cellulosic Fiber	132	—
POET Bioprocessing - Fairmont LLC	Fairmont	NE	Corn, Cellulosic Fiber	131	—
POET Bioprocessing - Fostoria LLC	Fostoria	OH	Corn, Cellulosic Fiber	90	—
POET Bioprocessing - Glenville LLC	Albert Lea	MN	Corn, Cellulosic Fiber	48	—
POET Bioprocessing - Gowrie LLC	Gowrie	IA	Corn, Cellulosic Fiber	90	—
POET Bioprocessing - Groton LLC	Groton	SD	Corn, Cellulosic Fiber	68	—
POET Bioprocessing - Hanlontown LLC	Hanlontown	IA	Corn, Cellulosic Fiber	80	—
POET Bioprocessing - Hudson LLC	Hudson	SD	Corn, Cellulosic Fiber	80	—
POET Bioprocessing - Iowa Falls LLC	Iowa Falls	IA	Corn, Cellulosic Fiber	112	—
POET Bioprocessing - Jewell LLC	Jewell	IA	Corn, Cellulosic Fiber	90	—
POET Bioprocessing - Laddonia LLC	Laddonia	MO	Corn, Cellulosic Fiber	80	—
POET Bioprocessing - Lake Crystal LLC	Lake Crystal	MN	Corn, Cellulosic Fiber	68	—
POET Bioprocessing - Leipsic LLC	Leipsic	OH	Corn, Cellulosic Fiber	90	—
POET Bioprocessing - Macon LLC	Macon	MO	Corn, Cellulosic Fiber	55	—
POET Bioprocessing - Marion LLC	Marion	OH	Corn, Cellulosic Fiber	155	—
POET Bioprocessing - Menlo LLC	Menlo	IA	Corn, Cellulosic Fiber	132	—
POET Bioprocessing - Mitchell LLC	Mitchell	SD	Corn, Cellulosic Fiber	86	—
POET Bioprocessing - North Manchester LLC	North Manchester	IN	Corn, Cellulosic Fiber	90	—
POET Bioprocessing - Obion LLC	Rives	TN	Corn	130	—
POET Bioprocessing - Portland LLC	Portland	IN	Corn, Cellulosic Fiber	90	—
POET Bioprocessing - Preston LLC	Preston	MN	Corn, Cellulosic Fiber	55	—
POET Bioprocessing - Shelbyville LLC	Shelbyville	IN	Corn, Cellulosic Fiber	98	—
POET Bioprocessing - Shell Rock LLC	Shell Rock	IA	Corn, Cellulosic Fiber	131	—
POET Research Center Inc.	Scotland	SD	Corn, Cellulosic Fiber	12	—
Pratt Energy LLC	Pratt	KS	Corn, Sorghum, Cellulosic Fiber	55	—
Primient	Loudon	TN	Corn	110	—
PureField Ingredients LLC	Russell	KS	Corn, Sorghum, Wheat Byproducts	55	—
Quad County Corn Processors	Galva	IA	Corn, Cellulosic Fiber	37	—
Red River Energy LLC	Rosholt	SD	Corn	35	—
Redfield Energy LLC	Redfield	SD	Corn, Cellulosic Fiber	62	—
Reeve Agri-Energy Inc.	Garden City	KS	Corn, Sorghum	15	—

Company	City	State	Feedstock	Production Capacity (MGY)	Capacity Under Constr./Expansion (MGY)
Ringneck Energy LLC	Onida	SD	Corn, Sorghum, Cellulosic Fiber	80	—
SAFFiRE Renewables LLC	Liberal	KS	Cellulosic Crop Residue	—	1
Sandhills Renewable Energy LLC	Atkinson	NE	Corn	55	—
Show Me Ethanol LLC	Carrollton	MO	Corn, Cellulosic Fiber	70	—
Siouxland Energy Cooperative	Sioux Center	IA	Corn, Cellulosic Fiber	70	—
Siouxland Ethanol LLC	Jackson	NE	Corn, Cellulosic Fiber	100	—
Southwest Iowa Renewable Energy LLC	Council Bluffs	IA	Corn, Cellulosic Fiber	140	—
Sterling Ethanol LLC	Sterling	CO	Corn	55	—
Tharaldson Ethanol LLC	Casselton	ND	Corn	170	—
The Andersons Renewables LLC – Albion	Albion	MI	Corn, Cellulosic Fiber	145	—
The Andersons Renewables LLC – Clymers	Logansport	IN	Corn, Cellulosic Fiber	140	—
The Andersons Renewables LLC – Denison	Denison	IA	Corn, Cellulosic Fiber	65	—
The Andersons Renewables LLC – Greenville	Greenville	OH	Corn, Cellulosic Fiber	150	—
Three Rivers Energy LLC	Coshocton	OH	Corn	55	—
Trenton Agri Products LLC	Trenton	NE	Corn, Sorghum, Cellulosic Fiber	50	—
United Energy Necedah LLC	Necedah	WI	Corn	100	—
United Ethanol LLC	Milton	WI	Corn	60	—
United Wisconsin Grain Producers LLC	Friesland	WI	Corn, Cellulosic Fiber	65	—
Valero Renewable Fuels Co. LLC	Albert City	IA	Corn, Cellulosic Fiber	140	—
Valero Renewable Fuels Co. LLC	Albion	NE	Corn	140	—
Valero Renewable Fuels Co. LLC	Aurora	SD	Corn	150	—
Valero Renewable Fuels Co. LLC	Bloomingsburg	OH	Corn	140	—
Valero Renewable Fuels Co. LLC	Bluffton	IN	Corn	140	—
Valero Renewable Fuels Co. LLC	Charles City	IA	Corn, Cellulosic Fiber	165	—
Valero Renewable Fuels Co. LLC	Fort Dodge	IA	Corn, Cellulosic Fiber	150	—
Valero Renewable Fuels Co. LLC	Hartley	IA	Corn, Cellulosic Fiber	150	—
Valero Renewable Fuels Co. LLC	Lakota	IA	Corn	110	—
Valero Renewable Fuels Co. LLC	Linden	IN	Corn	140	—
Valero Renewable Fuels Co. LLC	Mount Vernon	IN	Corn	100	—
Valero Renewable Fuels Co. LLC	Welcome	MN	Corn, Cellulosic Fiber	150	—
VERBIO Nevada Biorefinery	Nevada	IA	Corn, Cellulosic Crop Residue	60	—
VERBIO North America Corp.	South Bend	IN	Corn	100	—
Western New York Energy LLC	Medina	NY	Corn	63	—
Western Plains Energy LLC	Oakley	KS	Corn, Sorghum	52	—
White Energy Inc.	Hereford	TX	Corn, Sorghum	130	—
White Energy Inc.	Plainview	TX	Corn, Sorghum	130	—
Yuma Ethanol LLC	Yuma	CO	Corn	55	—
ZFS Riga LLC	Riga	MI	Corn	57	—
<b>U.S. Total</b>				<b>18,489</b>	<b>74</b>

Source: RFA, as of December 2025

## 2026 U.S. ALCOHOL-TO-JET (ATJ) SAF PRODUCTION CAPACITY BY BIOREFINERY

Company	City	State	Production Capacity (MGY)	Capacity Under Constr./Expansion (MGY)
Gevo Net-Zero 1 LLC	Lake Preston	SD	0	65
Crysalis Biosciences Inc.	Sauget	IL	0	30
GranBio LLC	Jessup	GA	0	1
LanzaJet Freedom Pines Fuels LLC	Soperton	GA	10	0
Marquis Sustainable Aviation Fuel	Hennepin	IL	0	120
SAFFiRE Renewables LLC	Liberal	KS	0	N/A
Summit Next Gen LLC	Houston	TX	0	250
<b>U.S. Total</b>			<b>10</b>	<b>466</b>

Source: RFA, as of December 2025

# BEYOND 10 PERCENT

Expanding the nationwide availability of higher ethanol blends, such as E15 and E85 flex fuel, is a top priority for the ethanol industry. This effort goes beyond securing year-round access to E15 and includes increasing its presence in states where it is already permitted but remains limited or difficult to find.

In 2025, after years of work by the Renewable Fuels Association and our allies, California became the final state to legalize E15, and RFA is working to remove regulatory roadblocks and help retailers offer the fuel to consumers. We are also applying lessons learned in the Golden State to other areas where E15 should be a more prevalent option for drivers.

The U.S. Environmental Protection Agency has approved the use of E15 in all light-duty vehicles manufactured since 2001, and the vast majority of automakers continue to warrant the use of E15 in their vehicles. Only a few automakers, representing a small fraction of new vehicles sold, still do not specifically list E15 as an approved fuel.

Flex fuels like E85 also continue to gain in popularity, and its use in California rose to record heights in 2025. General Motors expanded its latest FFV lineup to ten models, reversing years of limited offerings across all automakers. RFA continues to strongly advocate for the production of more FFVs and fairness in how alternative fuel vehicles are incentivized under fuel economy and greenhouse gas regulations, and voters clearly want the option to choose a flex fuel vehicle.

## E15 APPROVAL STATUS FOR U.S. LIGHT-DUTY VEHICLES

Automakers/Brands	Model Year														Market Share*		
	'12	'13	'14	'15	'16	'17	'18	'19	'20	'21	'22	'23	'24	'25		'26	
<b>BMW Group **</b>																	
BMW																	2.5%
Mini																	0.2%
<b>Daimler Group (Mercedes-Benz)</b>																	2.0%
<b>Ford Motor Co. (Ford &amp; Lincoln)</b>																	13.8%
<b>GM (Buick, Cadillac, Chevrolet &amp; GMC)</b>																	18.4%
<b>Honda Motor Co. (Acura &amp; Honda)</b>																	9.3%
<b>Hyundai Motor Co. (Genesis, Hyundai &amp; Kia)</b>																	11.5%
<b>Mazda</b>																	2.7%
<b>Mitsubishi Motors Corp. †</b>																	0.6%
<b>Nissan Motor Co.</b>																	
Infiniti																	0.3%
Nissan ‡																	5.5%
<b>Stellantis (Alfa Romeo, Chrysler, Dodge, Fiat, Jeep &amp; Ram)</b>																	7.9%
Subaru																	4.2%
<b>Tata Motors (Jaguar &amp; Land Rover)</b>																	0.7%
<b>Toyota Motor Corp.</b>																	
Lexus																	2.3%
Toyota §																	13.3%
<b>Volkswagen Group</b>																	
Audi																	1.2%
Porsche																	0.4%
Volkswagen																	2.2%
<b>Volvo Car Group</b>																	0.8%

\* Internal combustion engine models only. \*\*Approves the use of up to 25% ethanol blends. † Approves the use of E15 in Outlander. ‡ Approves the use of E15 except in 2.0L I4 engines § Approves the use of up to 25% ethanol blends in Supra

■ E15 approved by automaker in ALL models
 ■ E15 approved by automaker in SOME models
 ■ E15 approved by EPA only; NOT approved by automaker

## SURVEY SAYS...

A December 2025 survey of registered voters by Morning Consult found support for increasing availability of the lower-cost E15 blend at 69%. And nearly two-thirds of those surveyed (65%) want the federal government to promote the production and sale of flex fuel vehicles.

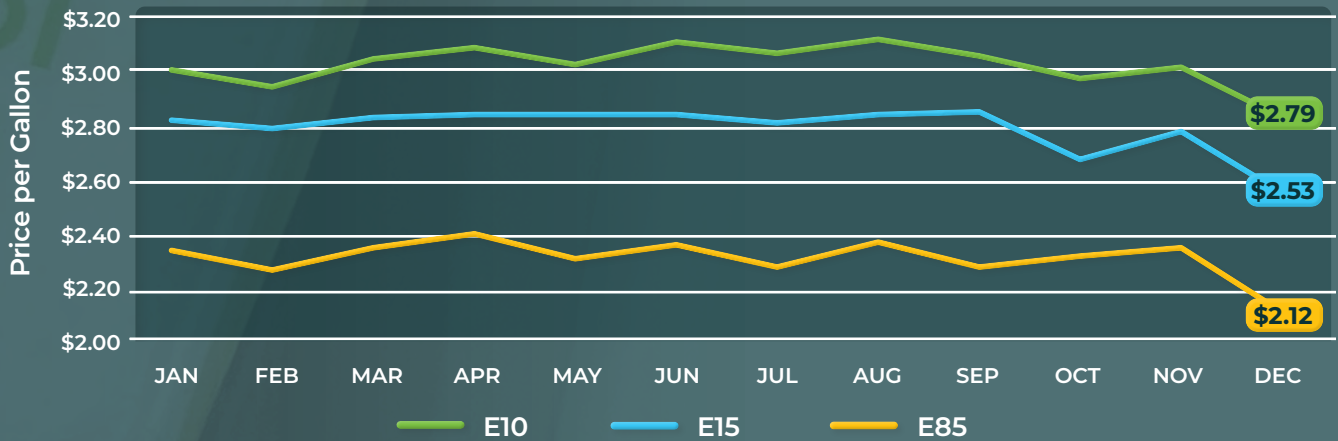
### COUNTRIES WITH E10 OR HIGHER ETHANOL BLENDS

Country	Ethanol Blend	Country	Ethanol Blend
Argentina	E12	Mozambique	E10
Bolivia	E30	Nepal	E10
Brazil	E30	Nigeria	E10
Canada	E10	Pakistan	E10
China	E10	Panama	E10
Colombia	E10	Peru	E7.8-E10
Dominican Republic	E10	Philippines	E10
Ethiopia	E10	South Africa	E2-E10
Eswatini	E10	Spain	E10
France	E10	Sri Lanka	E10
Germany	E10	United Kingdom	E10
India	E20	United States	E10
Italy	E10	Zambia	E10
Kenya	E10	Zimbabwe	E10
Malawi	E30		

Above countries have national or regional E10+ gasoline blending standards, policies, or mandates; some have regional or uneven implementation. Does not include countries that allow E85 Flex Fuel.

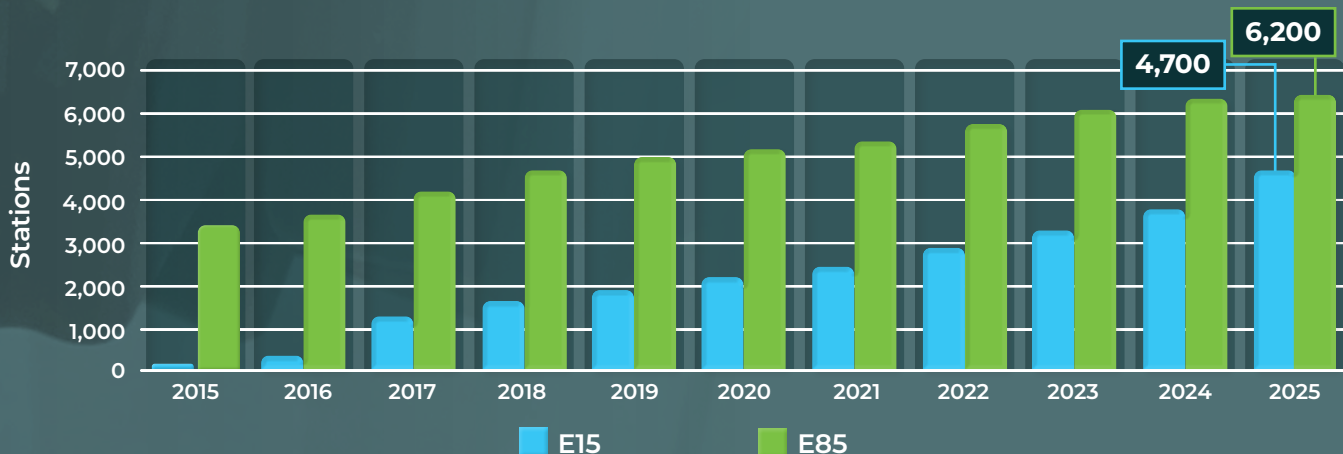
Source: RFA based on public sources

### 2025 NATIONAL AVERAGE RETAIL PRICES FOR E10, E15 & E85



Source: RFA based on E85prices.com data

### EXPANSION OF U.S. RETAIL STATIONS OFFERING E15 & E85



Source: RFA estimates based on multiple sources

# ETHANOL FOR ENERGY INDEPENDENCE

On the day of his inauguration, President Trump made it clear that energy independence would be a top priority of his administration. He declared a national energy emergency and issued an executive order focused on “Unleashing American Energy.” The declaration specifically pointed to ethanol, and stated, “An affordable and reliable domestic supply of energy is a fundamental requirement for the national and economic security of any nation.”

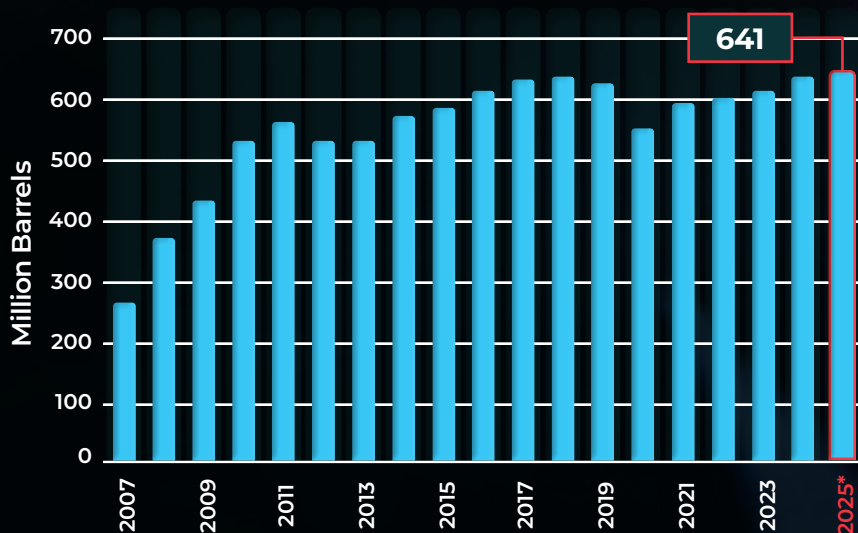
Ethanol delivers on those criteria: it is both affordable and reliable. More than 99 percent of the ethanol consumed in the United States is produced domestically—and it’s made exclusively from grain grown on American farms. The ethanol produced in the United States displaced the equivalent of 641 million barrels of oil in 2025.

Moreover, ethanol continued to save consumers money at the pump. On average, the price of ethanol was more than 25 cents per gallon below the price of gasoline blendstock on the futures market, a discount of 13 percent.

On the other hand, despite recent policies that are highly favorable to the oil industry, the U.S. still imported nearly 200 million barrels of oil per month in 2025. Imports continued to account for nearly one-third of the total U.S. oil supply and nearly 40 percent of inputs to refineries. As a result, Americans paid OPEC countries such as Saudi Arabia, Iraq, and Venezuela \$23 billion for crude oil.

Notably, 2025 marked the 20th anniversary of the Renewable Fuel Standard, a primary objective of which was to bolster U.S. energy security. The RFS has delivered on this promise, as the average ethanol content in the nation’s gasoline pool reached a record of 10.5 percent. And as demonstrated by the record-shattering corn crop harvested last fall, the resources exist to support even more domestic ethanol production as the adoption of E15 expands.

## HISTORICAL OIL IMPORT DISPLACEMENT BY ETHANOL



Source: RFA based on U.S. Dept. of Energy data \*Forecast

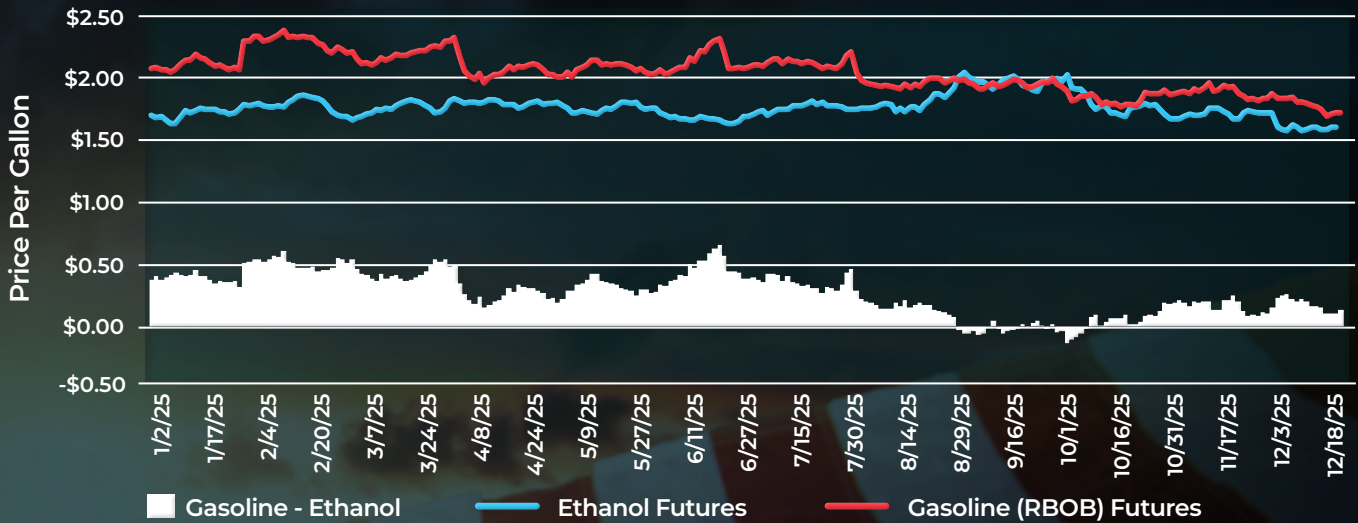
## TRANSFERRING AMERICAN WEALTH TO OPEC

The U.S. still pays billions of dollars every year to OPEC countries such as Saudi Arabia and Venezuela for crude oil.

OPEC Nation	U.S. Spending on Crude Oil Imports (Billion \$)
Saudi Arabia	\$7.0
Iraq	\$4.9
Nigeria	\$4.0
Venezuela	\$3.3
Libya	\$1.3
Angola	\$0.9
Other OPEC	\$1.7
<b>Total</b>	<b>\$23.0</b>

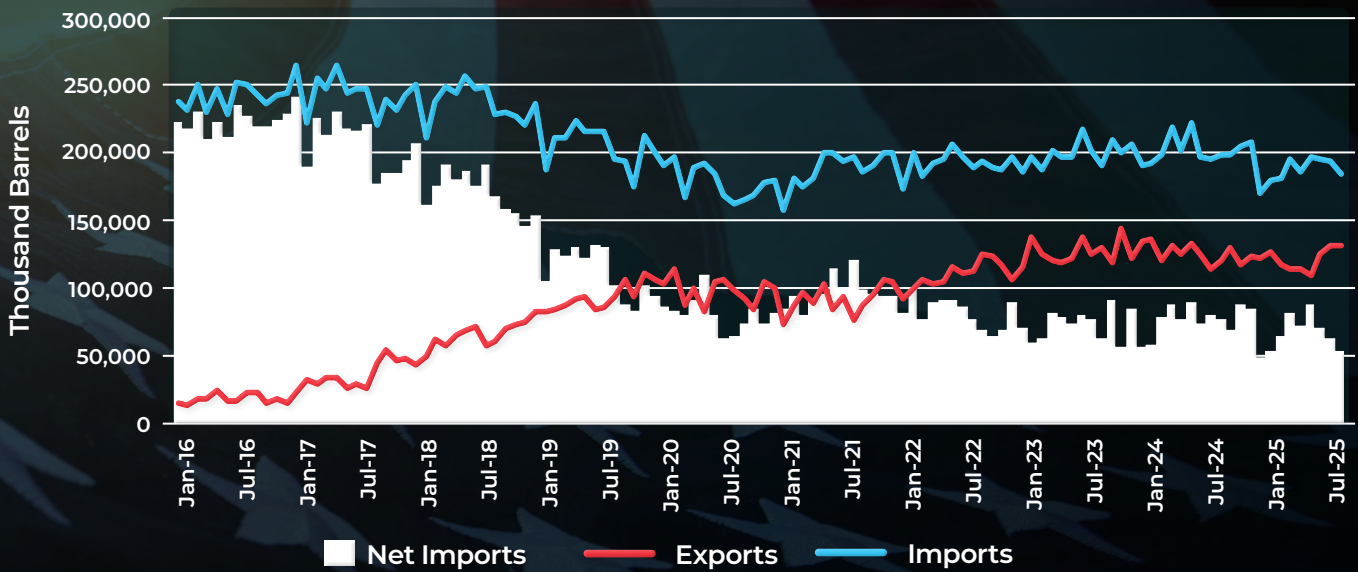
Source: RFA based on U.S. Census Bureau data through Sep. 2025

## WHOLESALE ETHANOL VS. GASOLINE PRICES

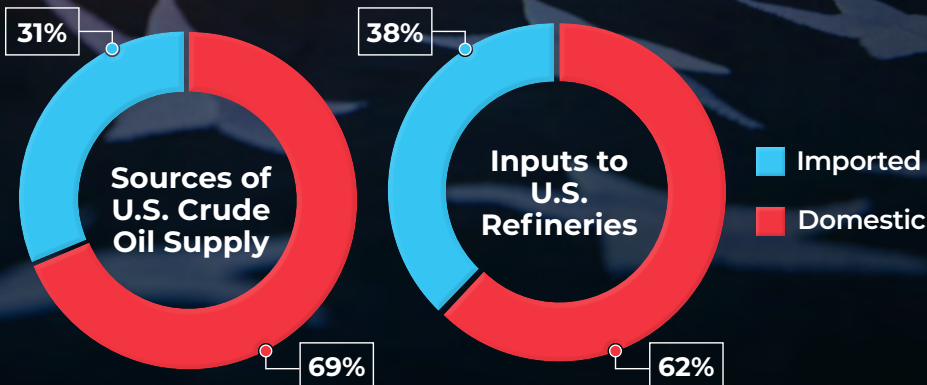


Source: CME Group

## U.S. CRUDE OIL TRADE



Source: U.S. Dept. of Energy



Source: RFA based on U.S. Dept. of Energy data

## SURVEY SAYS...

A December 2025 survey of registered voters by Morning Consult found that 79% believe it is important for America to be energy independent. Seventy-eight percent believe renewable fuels like ethanol are important to energy independence. And 73% believe it is very or somewhat important for their fuel to be made in America.

# ETHANOL'S VALUABLE COPRODUCTS

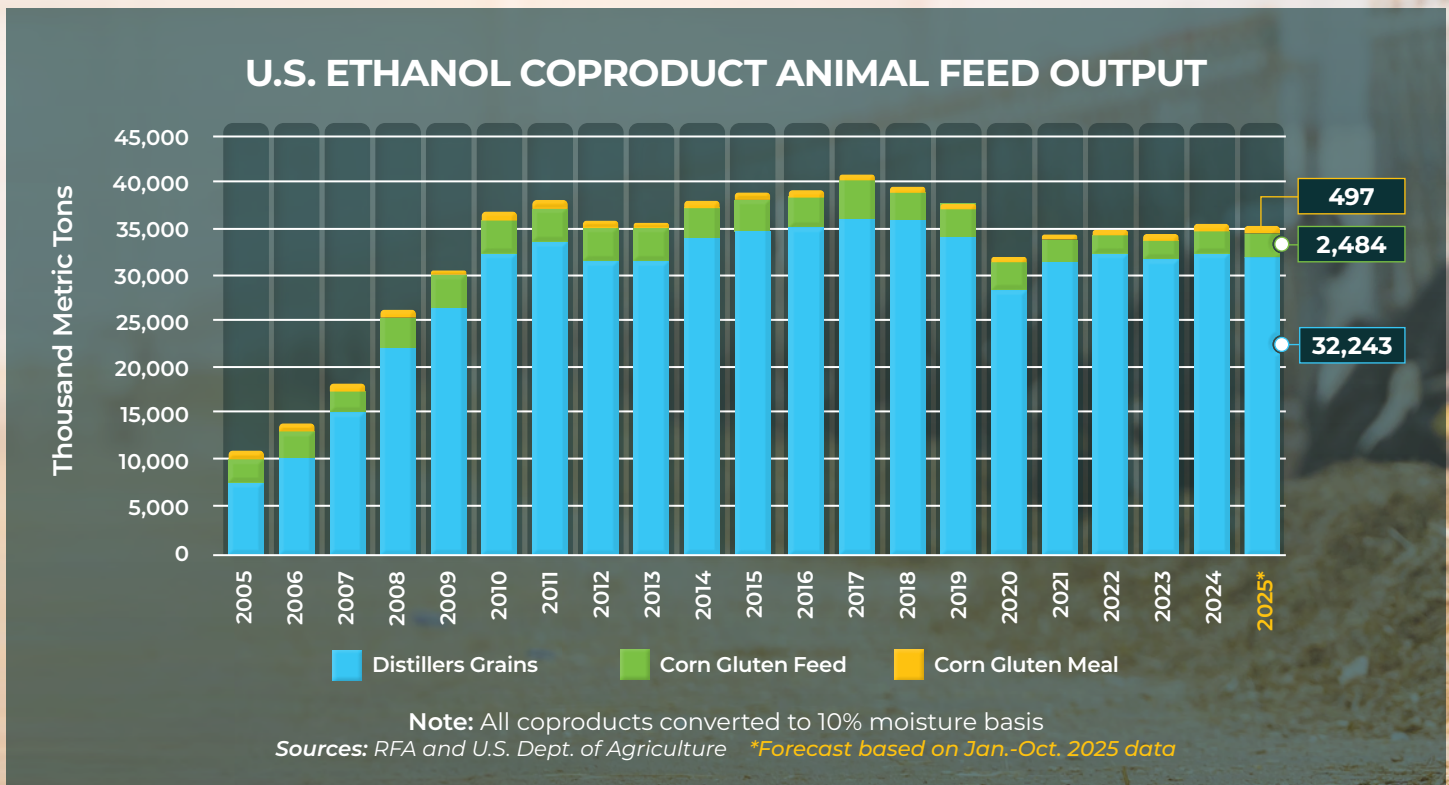
Corn ethanol fermentation generates high-value coproducts that play a dual economic role: supporting ethanol biorefinery margins while providing livestock, poultry, and aquaculture producers with dependable, lower-cost sources of protein and energy. In 2025, U.S. ethanol biorefineries generated over 35 million metric tons of distillers grains, corn gluten feed, and corn gluten meal. On a volume basis, these coproduct feeds rival the scope of soybean meal usage, helping moderate feed-cost volatility, expanding protein supply options, and serving as a natural hedge against swings in soybean meal prices.

In 2025, beef and dairy cattle accounted for roughly 70 percent of U.S. distillers grains use, reflecting well-established alignment with ruminant nutrition science and the ability of nearby operations to utilize wet and modified products. Swine producers represented nearly one-quarter of consumption, reinforcing the role of distillers grains as a cost-effective protein and energy input in commercial feed rations. Poultry use remains more targeted,

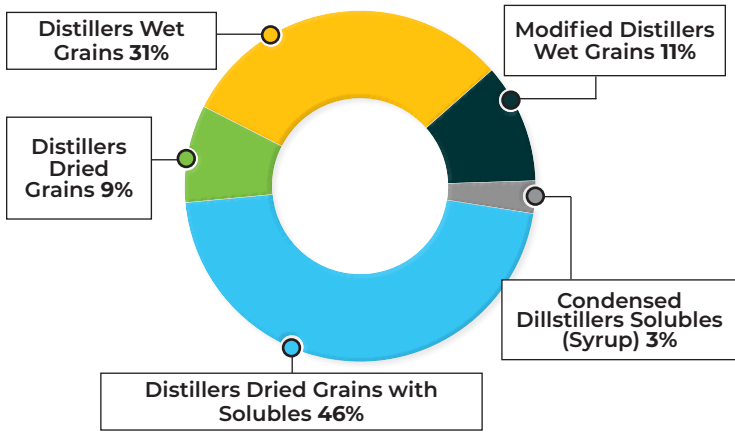
consistent with ration-specific optimization and continued advances in feed formulation.

Rapid biorefinery production optimization over the past five years has also driven record output of distillers corn oil. In 2025, DCO production grew 4 percent to 4.7 billion pounds. This expansion reflects both improved extraction efficiency—with yields improving 50 percent over the last decade and averaging roughly one pound per bushel processed—and growing end-use demand as a key feedstock for renewable diesel, biodiesel and sustainable aviation fuel, as well as for poultry feed.

Beyond feed and fuel coproducts, ethanol producers are increasingly unleashing the value of fermentation byproducts. The capture of a record 3 million tons of high-purity biogenic CO<sub>2</sub> in 2025 underscores ethanol's role as one of the most cost-effective and scalable carbon capture platforms in the economy, delivering immediate lifecycle emission reductions while laying the foundation for net-zero and potentially carbon-negative fuels.

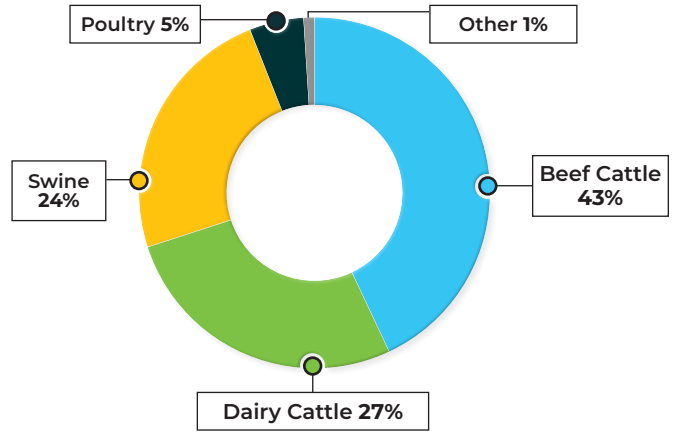


### 2025 DISTILLERS GRAINS PRODUCTION BY TYPE, AS-IS BASIS



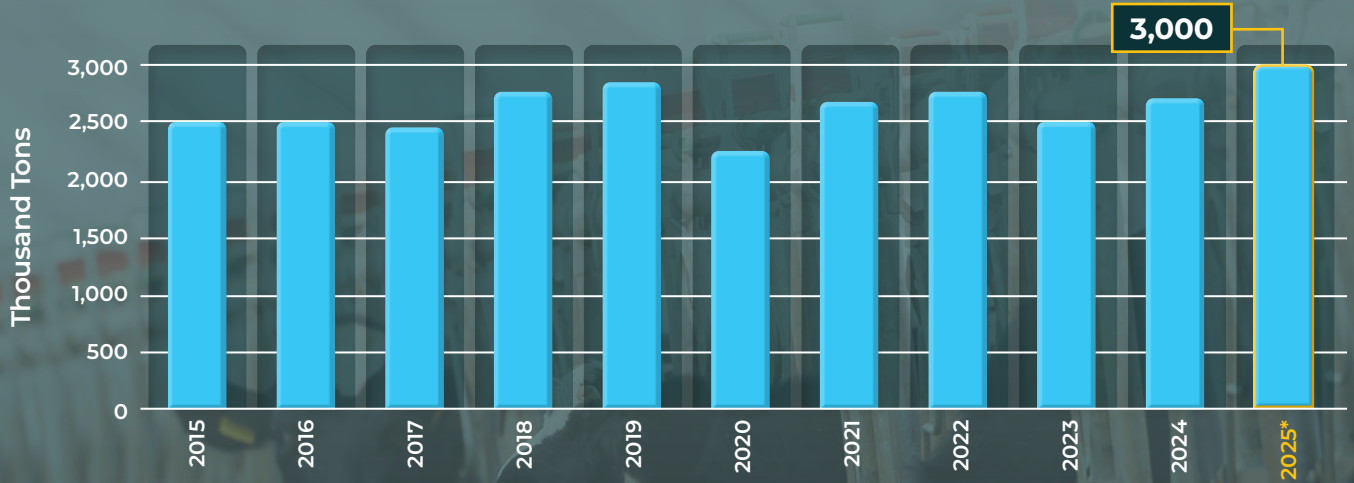
Source: U.S. Dept. of Agriculture. Based on Jan.-Oct. 2025 data.

### 2025 DISTILLERS GRAINS CONSUMPTION BY SPECIES



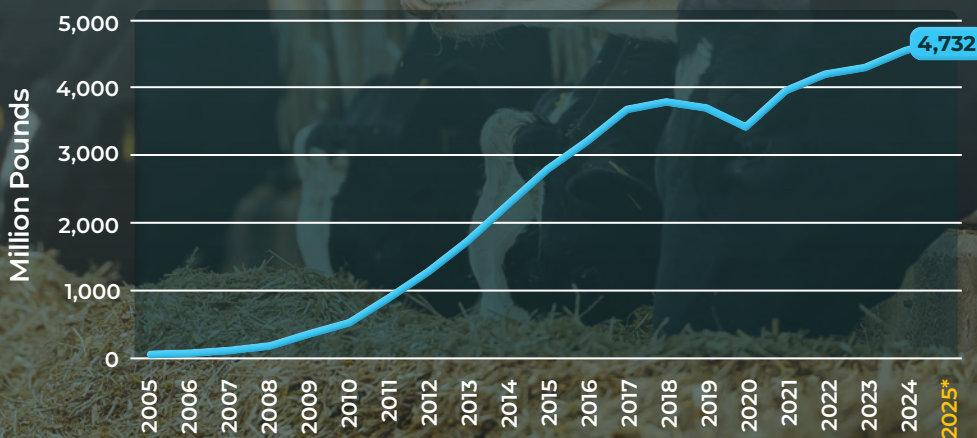
Source: Distillers grains marketing companies

### ANNUAL BIOGENIC CO<sub>2</sub> CAPTURED AT U.S. ETHANOL FACILITIES



Sources: RFA and U.S. Dept. of Agriculture \*Forecast based on Jan.-Oct. 2025 data

### DISTILLERS CORN OIL PRODUCTION



Source: RFA and U.S. Dept. of Agriculture \*Forecast based on Jan.-Oct. 2025 data

# SERVING A GLOBAL MARKETPLACE

Building on a record year in 2024, **U.S. ethanol exports increased 11 percent in 2025** to an estimated 2.2 billion gallons. American-made ethanol was shipped to nearly 90 countries and valued at roughly \$4.7 billion. **Exports accounted for a record 13 percent of total demand**, stimulating record production levels and domestic corn use. Meanwhile, U.S. ethanol imports remained negligible, consisting primarily of duty-free shipments from Brazil.

Canada accounted for more than one-third of U.S. ethanol exports in 2025, as demand for more affordable, cleaner fuels continues to surge north of the border. Exports to Canada are up 60 percent since 2022, following implementation of Clean Fuel Regulations. As carbon intensity requirements tighten, low-carbon U.S. ethanol has emerged as the most economical compliance option, positioning Canada as the most stable export market for U.S. ethanol through 2030.

Together, the European Union, India, and the United Kingdom accounted for another third of U.S. ethanol exports in 2025, reflecting the growing influence of policy-driven demand. U.S. exports to the EU more than doubled compared to 2024 levels, as compliance obligations tightened under Renewable Energy Directive policies. India's accelerated transition to E20 expanded ethanol demand faster than domestic supply growth, resulting in increased imports of U.S. ethanol to backfill industrial uses.



**TOP DESTINATIONS FOR U.S. ETHANOL EXPORTS**  
Rest of the World **6%**

**TOP DESTINATIONS FOR U.S. DISTILLERS GRAINS**  
Rest of the World **18%**

Sources: U.S. Dept. of Commerce, U.S. Census Bureau, Foreign Trade Statistics \*Based on Jan.-Sep. 2025 data

**“We won’t just increase ethanol production in our own country; we will make it our mission to export ethanol all over the world.”**

— **President Donald J. Trump**

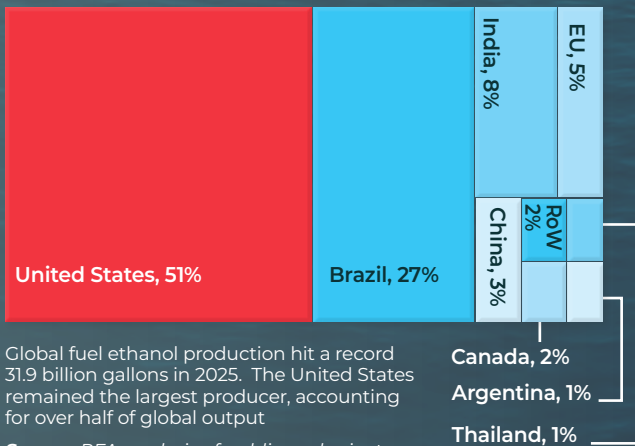
United Kingdom demand remained elevated after an exceptional year in 2024, supported by new E10 blending requirements.

Ethanol market access was a top priority in the U.S. government’s 2025 trade discussions, but only the United Kingdom delivered a concrete outcome, securing duty-free access for nearly 370 million gallons of U.S. ethanol. Japan and Vietnam are taking steps that could expand ethanol’s role in transportation fuels, making continued engagement on trade policy and regulatory alignment critical. Additional opportunities may also emerge in aviation and maritime fuel markets overseas, where U.S. ethanol could gain share if its low-carbon attributes are formally recognized.

In contrast, U.S. ethanol exports to Brazil and China remained constrained by persistent tariff and non-tariff barriers. Brazil’s 18 percent tariff continued to block U.S. ethanol from a once-robust market, while China’s prohibitive duties effectively closed access.

The industry also exported more than one-third of distillers grains production in 2025 to over 50 countries, totaling 11.5 million metric tons. For the ninth consecutive year, Mexico remained the top destination, while Asia-Pacific markets accounted for nearly 40 percent of exports.

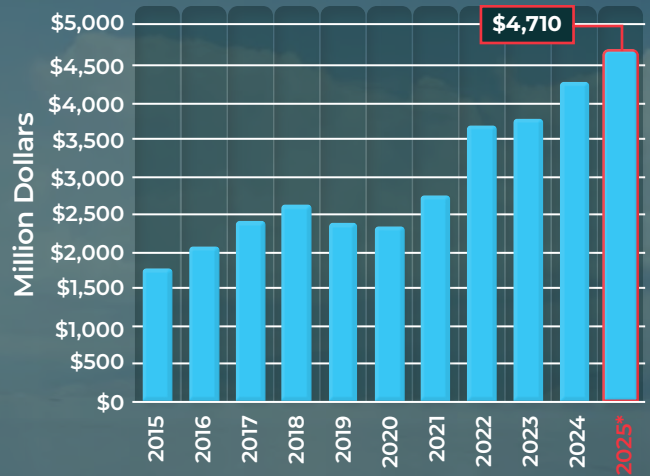
### 2025 GLOBAL FUEL ETHANOL PRODUCTION BY COUNTRY



Global fuel ethanol production hit a record 31.9 billion gallons in 2025. The United States remained the largest producer, accounting for over half of global output

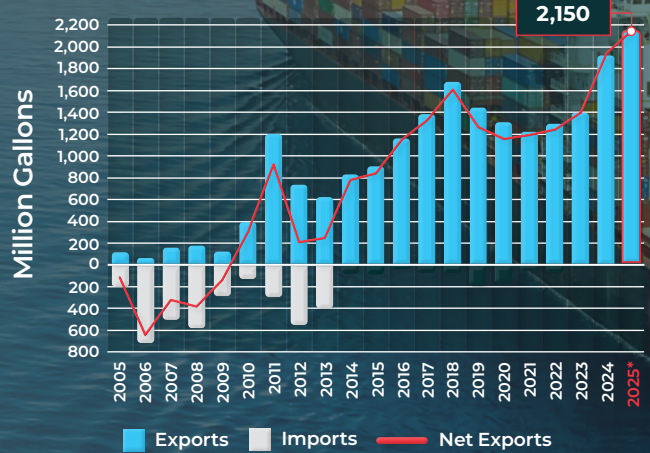
Source: RFA analysis of public and private data sources

### VALUE OF U.S. ETHANOL EXPORTS



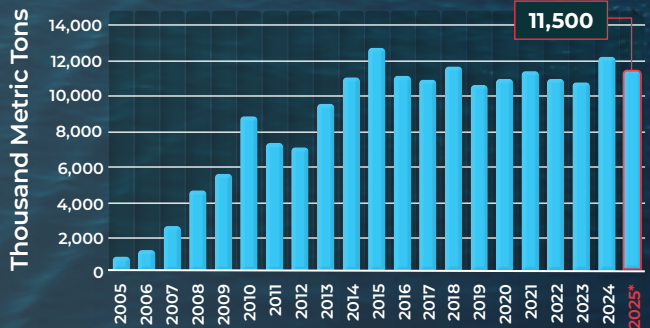
Source: U.S. Dept. of Commerce, U.S. Census Bureau, Foreign Trade Statistics \*Forecast based on Jan.-Sep. 2025 data

### U.S. NET ETHANOL EXPORTS



Source: U.S. Dept. of Commerce, U.S. Census Bureau, Foreign Trade Statistics \*Forecast based on Jan.-Sep. 2025 data

### U.S. DISTILLERS GRAINS EXPORTS



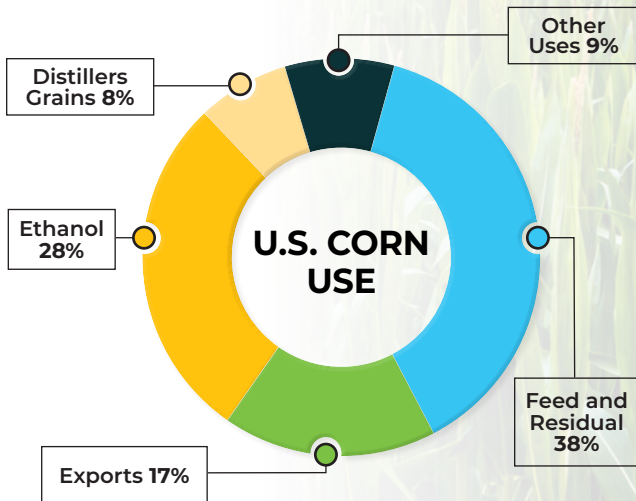
Source: U.S. Dept. of Commerce, U.S. Census Bureau, Foreign Trade Statistics \*Forecast based on Jan.-Sep. 2025 data

# SEEKING THE TRUTH

From the earliest days of the ethanol industry, the many advantages of renewable fuels have been demonstrated repeatedly. Still, critics intent on slowing the shift toward renewable fuels continue to recycle outdated myths—and create new ones. Below is a fact-based look at some of the issues, aimed at dispelling the persistent misinformation spread by ethanol's opponents.

## MEETING BOTH FOOD AND FUEL NEEDS

Thanks to the remarkable increase in corn production per acre, American farmers are growing more than enough corn to meet all needs for food, fuel and other uses—so much so, in fact, that each year brings a surplus of corn carried over to the next marketing year. After a record corn crop in 2025, the surplus coming into 2026 is more than 2.2 billion bushels. Often, critics talk about the amount of corn being made into ethanol as a “problem,” while ignoring the other products that come out of the biorefining process. In fact, the various types of distillers grains produced at ethanol plants are returned to farms as livestock feed, eventually becoming high-protein food in the form of beef, pork, poultry and fish. For the current marketing year, with nearly 1.2 billion corn-equivalent bushels of distillers grains produced, net corn usage for ethanol is at 28 percent.

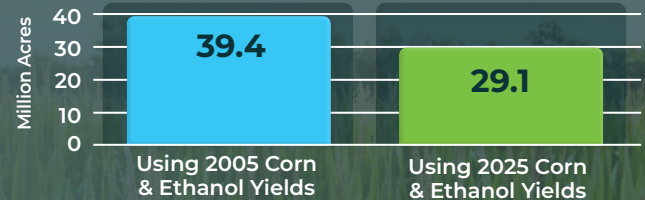


Source: National Corn Growers Association

## USING LESS LAND FOR ETHANOL PRODUCTION

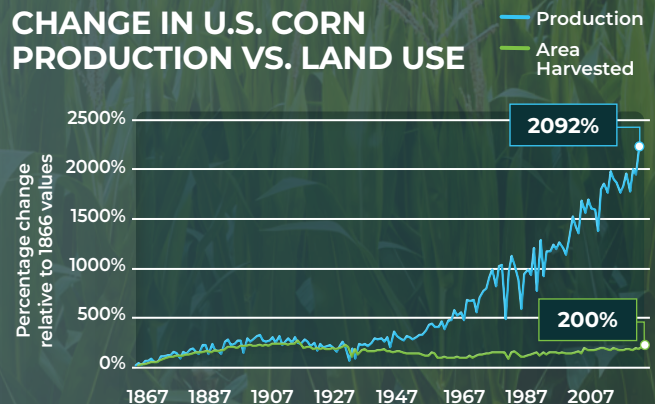
Because corn yields have increased dramatically over the past several decades, farmers are growing much more corn on the same relative acreage – a nearly sevenfold increase in production over the last century. When combined with increasing ethanol yields per bushel processed, this means that the amount of land needed for ethanol production has been steadily decreasing.

### HOW MANY CORN ACRES WOULD BE NEEDED TO PRODUCE 16 BILLION GALLONS OF ETHANOL?



Source: RFA

### CHANGE IN U.S. CORN PRODUCTION VS. LAND USE



Source: RFA, based on U.S. Dept. of Agriculture January 2026 data

## BALANCING ENERGY AND FUEL ECONOMY

While some often confuse a fuel's energy content with its fuel economy, mileage is not solely determined by energy density. Other factors play an important role, such as the fuel's heat of vaporization, octane value, fuel injection calibrations, and more. While the E15 blend, for example, has a slightly lower energy density than E10, mileage is not noticeably affected.

Vehicle testing by the University of California, Riverside analyzed the fuel economy of 20 light-duty vehicles when operating on E10 vs. E15. Some vehicles experienced better fuel economy when operating on E15 versus E10 due to E15's higher-octane value and lower heat of vaporization. Other vehicles showed no statistical difference in fuel economy between E15 and E10. Importantly, the lower cost of ethanol blends makes up for any fuel economy difference and saves drivers money with each mile they drive.

	MPG*	\$/gallon**	\$/mile	\$/year/household***
<b>E15</b>	28.28	\$2.79	\$0.099	\$2,448
<b>E10</b>	28.65	\$2.99	\$0.104	\$2,572
<b>Difference</b>	-0.37	<b>\$(0.20)</b>	<b>\$(0.005)</b>	<b>\$(124)</b>
<b>% Difference</b>	-1.3%	<b>-7.2%</b>	<b>-5.8%</b>	<b>-5.1%</b>

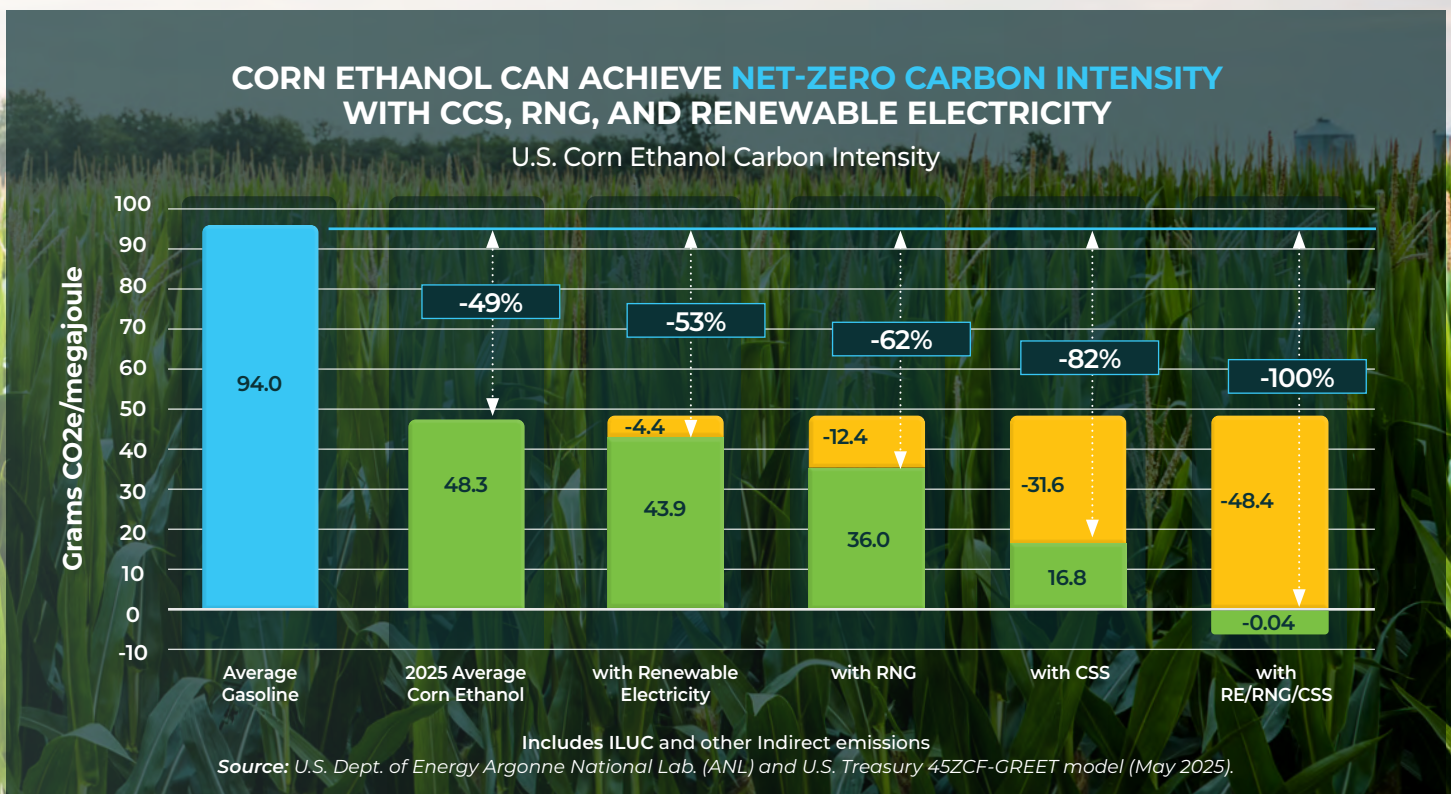
\*CARB/UCR vehicle testing

\*\*E15 prices (national average)

\*\*\*Federal Reserve Bank of St. Louis and Bureau of Transportation Statistics

## SLASHING CORN ETHANOL'S CARBON INTENSITY

As much as discussions around carbon emissions and climate change have shifted over the past year, corn ethanol's carbon story is a good one. There remains great potential for ethanol's carbon intensity to reach net-zero or better, as long as the right policies are in place. Ethanol producers continue to make great progress on lowering carbon intensity by using renewable electricity and biogas; carbon capture, sequestration and utilization; and other innovations



# SUPPORTING OUR MEMBERS

The Renewable Fuels Association offers its members several opportunities to engage, influence, and contribute to the advancement of renewable fuels, expanding their impact beyond individual operations through collaborative committees, forums, and networks. These efforts continue into 2026.

## RFA Environment, Health & Safety Committee

The EH&S Committee is dedicated to helping our members meet and exceed environmental, health, and safety standards. This committee serves as a vital platform for members to collaborate on best practices, navigate complex regulations, and develop innovative solutions. With a focus on production, handling, distribution, and incident response, RFA's EH&S Committee prioritizes protecting the environment and ensuring the safety of employees and consumers.

## RFA Strategy and Innovation Forum

The renewable fuels industry is evolving rapidly, fueled by technological advancements and emerging opportunities. Launched in 2023, this seminar series explores critical topics shaping the industry, including cutting-edge technologies, production efficiencies, emerging coproducts, and novel research. RFA's Strategy and Innovation Forum empowers members to stay ahead of the curve and strategically position their organizations for sustained success in the renewable fuels sector.



As part of the 2025 Fuel Ethanol Workshop in Omaha, attendees participated in an exclusive tour of the Pottawattamie County 911 and Emergency Management Agency facility, gaining firsthand perspective on emergency response coordination, incident communication, and community partnerships that keep ethanol facilities and their neighbors safe.

## RFA Technical Committee

Accurate and reliable information regarding the production, blending, distribution, and performance of renewable fuels is essential for the success of our industry. The RFA Technical Committee focuses heavily on fuel specifications and standards such as ASTM International, National Conference of Weights and Measures, ISO, Canadian General Standards Board, and other international fuel requirements.

## Young Professionals Network

Launched in 2020, RFA's YPN connects the next generation of leaders committed to driving progress and innovation in the renewable fuels industry. It offers member-only events that focus on networking, leadership growth, operational improvements,



At RFA's annual membership meeting in Omaha, members of the Young Professionals Network got an exclusive behind-the-scenes look at Charles Schwab Field, home of the College World Series. Stadium officials walked us through what it takes to prepare the stadium for one of college baseball's biggest events—from field prep and team logistics to broadcast setup and fan experience. The group toured player areas, media zones, and other parts of the stadium that most fans never get to see, while hearing plenty of inside stories along the way.

and exploring fresh strategies to expand ethanol's market presence. RFA's YPN is open to professionals 39 years old and younger who are employed in the U.S. ethanol industry or related stakeholder sectors.

### Veterans for Renewable Fuels

VRF is a growing community dedicated to honoring and supporting military veterans across the U.S. ethanol industry, a sector that employs veterans at more than three times the national average. Established in 2023, VRF celebrates the invaluable contributions of service members while fostering camaraderie, professional growth, and mutual support among industry professionals. The group also serves as a unified voice for advocacy, connecting the shared values of military service with the mission of advancing America's renewable energy future.



RFA's Preventive Controls for Animal Feed course in Sioux Falls prepared participants as Preventive Controls Qualified Individuals to advance safe, FSMA-compliant operations.



During the 2025 National Ethanol Conference, the VRF community came together for a special event at Old Glory Distilling Co. in Clarksville, Tennessee. Founder Matt Cunningham shared his remarkable journey from firefighter to distillery owner, while RFA's Justin Schultz delivered a personal story titled "Keep Moving," about resilience and perseverance in both military service and professional life.

# REACHING CONSUMERS

When it comes to expanding markets for ethanol, the Renewable Fuels Association works to identify appropriate opportunities to reach new and growing audiences that especially need to learn, and see for themselves, the power of ethanol.

## California E15 Campaign

RFA launched a campaign in 2025 that included a series of in-person workshops across multiple cities in California, offering an overview of what fuel retailers, equipment providers, blenders, terminal operators, and refiners need to know following E15's approval in the state. Each session walked attendees through E15 fundamentals, economic drivers, infrastructure requirements, and lessons learned from real-world market rollouts, helping businesses prepare for a smooth transition. In addition, RFA delivered additional industry webinars that provided timely regulatory updates, technical guidance, and operational insights to support ethanol producers, retailers, and partners nationwide. The campaign also included a new website and advertising across the state.

## Building Energy Literacy

In 2025, the Renewable Fuels Foundation released an updated version of Ethanol in the Classroom, an interactive learning module designed to support STEM and agriculture education. The updated version includes refreshed data, timely content, and new graphics. Worksheets developed in collaboration with Kansas Corn STEM help students and teachers track learning progress and reinforce key concepts. The Ethanol in the Classroom eLearning program features modules for grades 3–12. By building foundational knowledge about renewable energy, agriculture, and sustainability, the program helps students understand how everyday choices connect to science, innovation, and the broader energy system.



Just as an E15 bill sailed through the California state legislature and was signed by Gov. Gavin Newsom, RFA held a number of seminars up and down the state to prepare retailers for offering the lower-cost fuel to California drivers.



## Girls Auto Clinic

The partnership between RFA and Girls Auto Clinic (GAC) continues to expand ethanol education among women engaged in car buying, maintenance, and repair. Founded by Patrice Banks



Girls Auto Clinic hosted a super-sized RFA workshop in October 2025, bringing even more visibility to ethanol education. Ethanol content remains a consistent part of GAC's social media and Shecanic Blog, helping further extend our reach to consumers.

in 2013, GAC empowers women—"shecanics"—with the knowledge to make confident, informed automotive decisions. Through this collaboration, GAC amplifies ethanol's story, highlighting cost savings, environmental benefits, and public health impacts across its workshops and digital platforms.

## Fueling Fishing Competitions

RFA continues its efforts to promote ethanol as a smart fuel for anglers across both bass and crappie competitions. With sponsored teams in the Midwest Crappie Chasers and the Major League Fishing, ethanol was seen across the country as the preferred fuel of recreational boaters wanting to keep the air and water clean.

## Fuel Price Tracking

Hosted by RFA, the websites E85Prices.com and E15Prices.com provide crowdsourced data on the prices of E85 and E15 fuels, offering users the ability to view real-time price updates across different regions. The websites also include features like a station locator, map, a price reporting tool, a savings calculator, and a list of vehicles that are compatible with E15 and E85, giving consumers instant insight into fuel prices and the potential savings of using ethanol compared to traditional gasoline. A related smartphone app is currently available for Apple and Android devices.



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Drive growth in sustainable renewable fuels and bioproducts for a better future.

## OUR VISION

Help the world by unlocking the power of renewable fuels and bioproducts.

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## OUR MISSION

Meet the future education, research, and strategic planning needs of the U.S. ethanol industry.

## OUR FOCUS

Collaboration with academia, industry, and public policymakers on new uses, feedstocks, and technologies that will impact the future of ethanol.

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**Grain Elevator and Processing Society (GEAPS)**  
geaps.com

**H<sub>2</sub>O Innovation**  
h2oinnovation.com

**Hawkeye Gold LLC – subsidiary of J.D. Heiskell & Co.**  
heiskell.com

**IFF**  
xcelis.com

**Illinois Corn Marketing Board**  
ilcorn.org

**Illinois Farm Bureau**  
ilfb.org

**IMA Financial Group Inc.**  
imacorp.com

**incite.ag**  
incite.ag

**Indiana Corn Marketing Council**  
incornandsoy.org

**Iowa Corn Growers Association**  
iowacorn.org

**Iowa Renewable Fuels Association**  
iowarfa.org

**Kansas Corn Commission**  
ksccorn.com

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ksccorn.com

**KATZEN International Inc.**  
katzen.com

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**Kurita America Inc.**  
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lbds.com

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mncorn.org

**Minnesota Corn Research & Promotion Council**  
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**National Corn Growers Association**  
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**National Corn-to-Ethanol Research Center**  
ethanolresearch.com

**Nebraska Corn Board**  
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**Nebraska Corn Growers Association**  
necga.org

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protect.llc

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**RCM Thermal Kinetics**  
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**Renew Kansas**  
renewkansas.com

**Renewable Fuels Nebraska**  
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**RPMG LLC**  
rpmgllc.com

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rsmus.com

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solitionsciences.com

**Sorghum Checkoff**  
sorghumcheckoff.com

**StepOne Tech America Inc.**  
eflexfuel.com

**StoneX Group Inc.**  
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**Sundaram Brake Linings Ltd.**  
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**Superior Environmental Solutions**  
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tncorn.org

**Texas International Terminals Ltd.**  
titerminals.com

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gbx.com

**The ProExporter Network**  
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distillersgrains.org

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ifl.iowacentral.edu

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marylandgrain.org

**National Sorghum Producers**  
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**New York Corn & Soybean Growers Association**  
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**North Dakota Corn Council**  
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**South Dakota Corn Growers Association**  
sdcorn.org

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grains.org



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