

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.



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

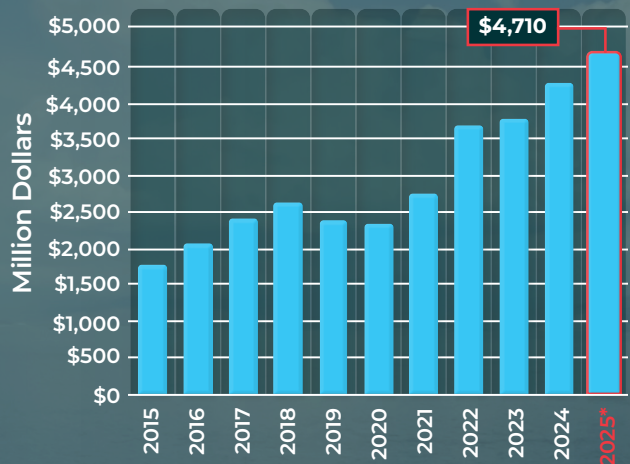
United Kingdom demand remained elevated after an exceptional year in 2024, supported by new E10 blending requirements.

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.

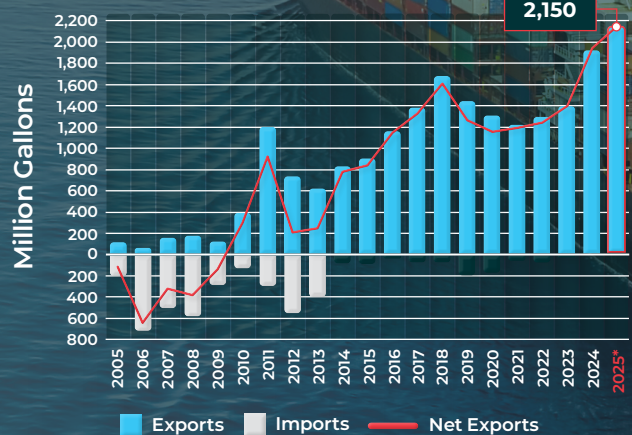
The industry also exported more than one-third of distillers grains production in 2025 to over 50 countries, totaling 11.5 million metric tons. For the ninth consecutive year, Mexico remained the top destination, while Asia-Pacific markets accounted for nearly 40 percent of exports.

VALUE OF U.S. ETHANOL EXPORTS



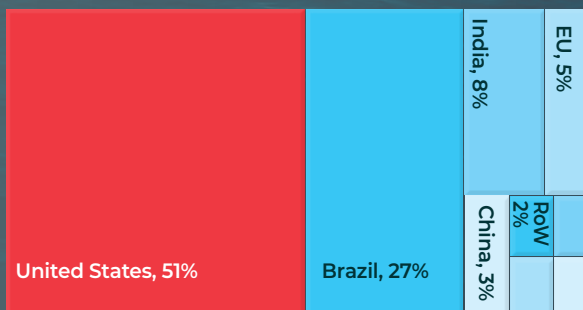
Source: U.S. Dept. of Commerce, U.S. Census Bureau, Foreign Trade Statistics *Forecast based on Jan.-Sep. 2025 data

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

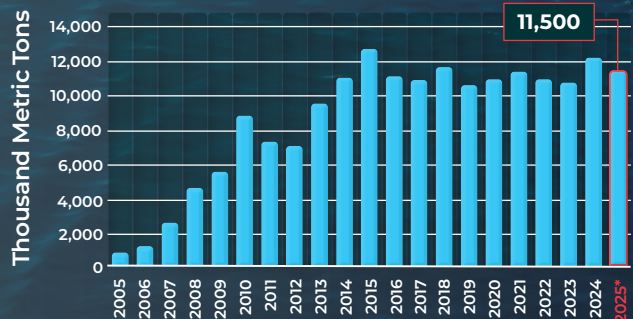
2025 GLOBAL FUEL ETHANOL PRODUCTION BY COUNTRY



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

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