RENEWABLE FUELS ASSOCIATION

Nationwide E15 Sales Jump 23% In 2025, Setting New Record:

As Gasoline Prices Soar, the Need for Federal Legislation Allowing Year-Round E15 Sales Is Clearer Than Ever Before

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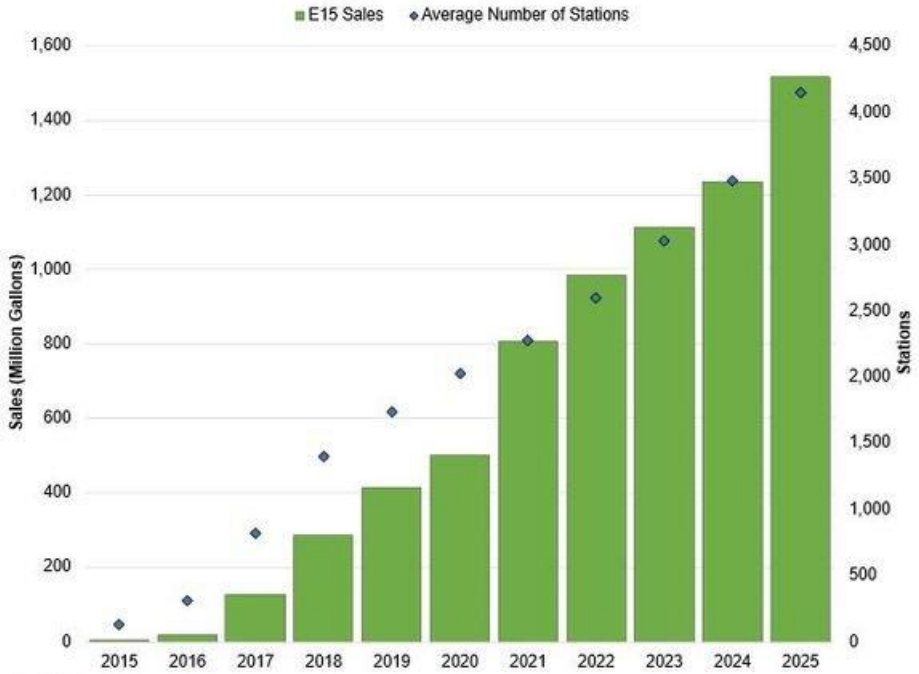
By Scott Richman, RFA Chief Economist

U.S. sales of E15, a gasoline blend containing 15 percent ethanol, hit a record 1.52 billion gallons in 2025, an increase of 23 percent over 2024, according to a Renewable Fuels Association analysis of data released by state agencies in **Minnesota** and **Iowa** (Exhibit 1). The increase was due to a combination of increased sales per station and accelerated growth in the number of stations offering E15 across the U.S.

Exhibit 1: Number of Stations Offering E15 and Estimated U.S. Volumes



Source: RFA

Reported sales of E15 surged 60 percent in Iowa to more than 410 million gallons. This was due in part to the state's E15 Access Standard, which required most retailers to make the fuel available to consumers by the beginning of this year.

Because a significant number of stations that sell E15 and other midlevel blends of ethanol in Minnesota are not required to report their volumes to the Department of Commerce, the DOC estimates total midlevel blend sales "using the number of stations operating times the station [average] volume reported."[1] E15 has accounted for 99 percent of midlevel blend sales reported in Minnesota in recent years. Multiplying this share by DOC's estimate of total midlevel blend sales implies that 169 million gallons of E15 were sold in the state last year.

Thus, combined sales in Iowa and Minnesota were 579 million gallons, compared to 428 million gallons in 2024.[2] Minnesota and Iowa are the only two states for which reliable government data exist for E15 sales volumes.

Across the United States, RFA estimates that the number of stations offering E15 rose to 4,600 by the end of 2025, an increase of 900 from the end of 2024. This equaled the combined increase over the prior two years. The average number of stations offering E15 during the full 2025 calendar year was 4,150.

Total U.S. E15 sales can be estimated using the data for Iowa and Minnesota, given that the two states account for more than a third of U.S. stations offering E15. Average annual E15 sales per reporting station across the states have centered around 365,000 gallons over the last five years.

Multiplying the number of stations selling E15 in the U.S. by the average of reported sales per station in Iowa and Minnesota, RFA estimates that nationwide E15 sales increased to a record 1.52 billion gallons in 2025, compared to 1.24 billion gallons a year earlier (Exhibit 2).

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Exhibit 2: Minnesota and Iowa E15 Sales and Estimated U.S. Volumes (Million Gallons, Except for Station Count)

	2019	2020	2021	2022	2023	2024	2025
E15 Sales Volume							
As Reported							
Minnesota	79	75	87	106	128	143	144
Iowa	49	61	87	119	179	257	410
Estimated Total							
Minnesota	98	93	130	171	168	171	169
Iowa (As Reported Except 2020-2023)	49	67	97	156	217	257	410
E15 Sold per Reporting Station							
Minnesota	0.28	0.25	0.32	0.39	0.37	0.37	0.35
Iowa	0.20	0.24	0.39	0.37	0.37	0.34	0.39
Average	0.24	0.25	0.35	0.38	0.37	0.36	0.37
United States Estimate							
Average Number of Stations	1,740	2,030	2,280	2,600	3,030	3,480	4,150
Estimated E15 Sales Volume	415	500	807	986	1,113	1,236	1,516
Ethanol Content of E15	62	75	121	148	167	185	227

Source: U.S. estimates are based on RFA data and analysis. State estimates are based on data from the Minnesota Dept. of Commerce and Iowa Dept. of Revenue and analysis by RFA.
Note on estimated total sales: For Minnesota, the volume is based on DOC-estimated midlevel blend sales multiplied by the E15 share of reported E15-E50 sales. For Iowa, reported gallons were used for all years except 2020-2023, when the survey response rate fell below 85%; for those years, sales were prorated based on the ratio of total taxable gasoline and ethanol blend sales in the monthly DOR reports to the annual report.

E15 volumes have risen in recent years for three reasons. First, since 2019, sales of E15 have been allowed during the summer months in areas of the U.S. where conventional gasoline is used.[3] The first Trump administration issued a rule allowing year-round sales of E15 in 2019. Although the D.C. Circuit Court of Appeals vacated the rule in 2021, deciding in favor of oil refiners, the EPA has continued to grant summertime waivers for from the regulatory requirement since then, citing "extreme and unusual fuel or fuel additive supply circumstances." Most recently, the EPA on March 25 announced it would issue emergency waivers this summer. While these emergency waivers have allowed existing E15 retailers to continue selling E15 through the summer months, the uncertainty surrounding their issuance and timing of the waivers have led many retailers who do not currently offer E15 to "remain on the sidelines."

Second, the expansion of E15 infrastructure has been facilitated by $537 million in funding through the federal **Higher Blends Infrastructure Incentive Program** (HBIIP), along with additional funds that were provided by a predecessor program.

Third, E15 is usually priced at a significant discount to regular unleaded gasoline. Drivers typically save at least **25 cents per gallon** when filling up with E15, and that discount has been even larger over the last month, as gasoline prices have risen sharply due to the military conflict in Iran and the effective closure of the Strait of Hormuz. Coincidentally, the Iowa Department of Revenue report showing record E15 sales happened to be released the same day that the U.S. average retail gasoline price crossed above $4 per gallon.

The nationwide E15 sales volume estimate presented here may understate actual E15 sales. Many of the stations selling E15 in Minnesota and Iowa are in less populous rural areas, meaning the average sales volumes from stations in those states may be lower than average volumes for stations in busier, more populous areas for which data do not exist. For example, there is fairly high concentration of high-volume stations offering E15 along the busy I-95 corridor in Florida. Moreover, E15 is offered at hundreds of high-volume stations in densely populated metro areas like Houston, Dallas, Kansas City, Colombus, Indianapolis, Milwaukee, Chicago, Pittsburgh, Philadelphia, and Raleigh-Durham.

The need for temporary emergency waivers each year in conventional gasoline areas, which account for roughly two-thirds of U.S. gasoline consumption, has kept retailers from embracing E15 more widely. The best solution for both fuel supply chain participants and American consumers would be passage of legislation permanently allowing year-round sale of E15, such as the Nationwide Consumer and Fuel Retailer Choice Act (**S. 593**). In early 2026, a legislative solution was offered as part of a government funding bill, but it was not included in the final version; instead, an E15 Domestic Energy Council was established to forge a compromise on the issue, but thus far it has not introduced legislation.

Nearly all gasoline sold in the U.S. today contains ethanol, and the presence of ethanol in the fuel pool has mitigated the rise in retail gasoline prices during the Iran conflict. Ethanol increases fuel supplies, and the price of ethanol has increased far less than the price of gasoline blendstock over the last month. Over the last couple of weeks, ethanol has been priced more than $1 per gallon below gasoline blendstock (RBOB) at the wholesale level. It is no coincidence that in several states where ethanol production is concentrated—and E15 stations are most prevalent—retail gasoline prices showed the **smallest increases** during March.

Ethanol's positive impact during times of geopolitical turmoil is not a new development. In a 2019 **study**, energy economist Dr. Philip Verleger looked at oil market disruptions over nearly 50 years and determined that "even a modest amount of renewable fuels can significantly moderate the price impact of market disruptions."

If the original Consumer and Fuel Retailer Choice Act introduced in 2017 or subsequent legislation allowing year-round, nationwide sales of E15 had been enacted, the U.S. would be considerably farther along in its adoption of E15 right now. This would have further mitigated the rise in gasoline prices over the last month.

Moreover, the farm sector is experiencing challenging times, and after a record-shattering corn crop was harvested last fall, larger sales of E15 would have provided a much-needed boost to demand. A **study** conducted in September by RFA and the National Corn Growers Association found that full adoption of E15 would add $25.8 billion to U.S. gross domestic product, of which $13.8 billion would be generated by the agriculture sector.

The time to act is now. For American consumers, for farmers, and for the broader economy, it's time to use common sense and do what should have been done long ago: pass legislation unleashing E15.

NOTES

[1] Annually from 2015 to 2024, only between 61 percent and 83 percent of operating stations selling midlevel blends in Minnesota reported their volumes to the DOC, though this improved to 86 percent last year.

[2] This likely underestimates actual sales of E15 in Minnesota. RFA has identified considerably more stations selling E15 in the state than the 500 operating stations the Department of Commerce indicated were selling midlevel blends at the end of the year.

[3] EPA limits the volatility of gasoline during the "high ozone season" every summer (June 1-September 15). Prior to the 2019 rule, the practical limit on the Reid vapor pressure (RVP) of E10 sold in conventional gasoline areas was 10 pounds per square inch (psi), but E15 was held to a 9-psi limit. EPA's 2019 rule effectively extended the E15 volatility limit to 10 psi, creating parity for E15 and E10.