

Global HVO-100 Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G623021BB038EN.html>

Date: August 2026

Pages: 127

Price: US\$ 4,480.00 (Single User License)

ID: G623021BB038EN

Abstracts

The global HVO-100 market size is expected to reach \$ 84.27 million by 2032, rising at a market growth of 17.6% CAGR during the forecast period (2026-2032).

In 2025, the global production of HVO-100 reached approximately 24,000 tons, with an average global market price of around US\$1,100 per ton. In the same year, the global total production capacity of HVO-100 reached 30,000 tons. The industry average gross profit margin of this product reached 20%-40%. HVO-100 (Hydrotreated Vegetable Oil 100%) is a 100% renewable diesel fuel made by hydrotreating vegetable oil, animal fat or waste oil. Its chemical structure is similar to fossil diesel and can be used directly in conventional diesel engines without modification. It has a higher cetane number (70-90), lower sulfur content, better low-temperature performance and reduces greenhouse gas emissions by up to 90%. HVO-100 complies with EN 15940 standards and is suitable for transportation, shipping and other fields. It is a high-end product among biofuels.

The HVO-100 industry chain begins upstream with the supply of biomass feedstocks, including used cooking oil (UCO), animal fats, palm oil, and other vegetable oil resources. The midstream comprises the core production phase, where bio-oils are converted into high-purity paraffinic diesel using hydrotreating and isomerization technologies; this segment is dominated by refining companies such as Neste and Chevron Renewable Energy Group. The downstream sector consists of end-use markets, including road transport, off-road machinery, marine fuel, and certain sustainable aviation fuel applications. The entire industry chain relies heavily on the stability of feedstock supplies and policy incentives, exhibiting a structure defined by feedstock constraints, policy drivers, and capital-intensive refining operations.

Future growth for HVO-100 is primarily driven by global carbon neutrality policies, the

demand for alternative transport fuels, and decarbonization efforts in the aviation and shipping sectors. As a 'drop-in' fuel solution, it addresses a persistent, long-term demand in heavy-duty transport sectors that are difficult to electrify. While demand is expected to expand alongside the implementation of the EU's RED III, the US Low Carbon Fuel Standard (LCFS), and stricter global shipping emission regulations, growth remains constrained by bottlenecks in feedstock supply (such as waste oils) and high production costs. In the long term, HVO-100 will form part of a multi-pathway decarbonization energy system alongside electrification and hydrogen; it is projected to maintain rapid growth through 2030, though it may subsequently enter a phase characterized by feedstock constraints and price competition.

This report studies the global HVO-100 production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for HVO-100 and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of HVO-100 that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global HVO-100 total production and demand, 2021-2032, (Kilotons)

Global HVO-100 total production value, 2021-2032, (USD Million)

Global HVO-100 production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)

Global HVO-100 consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: HVO-100 domestic production, consumption, key domestic manufacturers and share

Global HVO-100 production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)

Global HVO-100 production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global HVO-100 production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global HVO-100 market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Neste, Crown Oil, Moeve, ORLEN, OG Clean Fuels, Star

Oilco, Valero, Phillips 66, Shell, UPM Biofuels, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World HVO-100 market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Kilotons) and average price (US\$/Ton) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global HVO-100 Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global HVO-100 Market, Segmentation by Type:

Waste Cooking Oil

Industrial Waste Fats/oils

Animal Fats

Others

Global HVO-100 Market, Segmentation by Technical Pathways:

Hydrodeoxygenation

Isomerization

Global HVO-100 Market, Segmentation by Carbon Intensity:

Low-CI HVO

Medium-CI HVO

High-CI HVO

Global HVO-100 Market, Segmentation by Application:

Road Vehicles

Non-road Machinery

Ship

Others

Companies Profiled:

Neste

Crown Oil

Moeve

ORLEN

OG Clean Fuels

Star Oilco

Valero

Phillips 66

Shell

UPM Biofuels

TotalEnergies

Enilive

Sinopec

ENEOS Corporation

Key Questions Answered:

1. How big is the global HVO-100 market?
2. What is the demand of the global HVO-100 market?
3. What is the year over year growth of the global HVO-100 market?
4. What is the production and production value of the global HVO-100 market?
5. Who are the key producers in the global HVO-100 market?
6. What are the growth factors driving the market demand?

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