

Global Second Generation Biodiesel(HVO) Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/GE3FFC8B15A5EN.html>

Date: July 2026

Pages: 161

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

ID: GE3FFC8B15A5EN

Abstracts

The global Second Generation Biodiesel(HVO) market size is expected to reach \$ 51591 million by 2032, rising at a market growth of 6.2% CAGR during the forecast period (2026-2032).

Global sales volume of second-generation biodiesel is projected to reach 19.86 million tonnes in 2025, with an average price of \$1,683 per tonne.

Second-generation biodiesel (also known as HVO?Hydrotreated Vegetable Oil) is an advanced biofuel produced from non-edible oils or waste fats through processes such as catalytic hydrodeoxygenation and hydroisomerization. Unlike first-generation biodiesel (FAME?Fatty Acid Methyl Esters), which is produced via transesterification, second-generation biodiesel removes oxygen atoms from the feedstock in the form of water and carbon dioxide. This yields straight-chain alkanes (C15?C18) with molecular structures almost identical to those of petroleum-based diesel; hence, it is also referred to as 'renewable diesel' or 'green diesel.' Its key advantages include a high cetane number (75?99, compared to ~50 for petroleum diesel), excellent oxidative stability, and superior low-temperature flow properties (pour point as low as -30?C). It can be blended with petroleum diesel in any proportion or used directly at 100% concentration without requiring engine or infrastructure modifications.

Feedstocks for second-generation biodiesel primarily include waste oils (such as Used Cooking Oil/UCO, 'gutter oil,' and swill oil), animal fats, Palm Oil Mill Effluent (POME) oil, vegetable oils (palm, rapeseed, and soybean oil), and tall oil. There are significant regional differences in feedstock preferences: Europe relies mainly on rapeseed oil and UCO; the Americas primarily use soybean oil; Southeast Asia favors palm oil; and China predominantly utilizes waste oils, with an estimated annual resource of 4?5 million tonnes of 'gutter oil.' Feedstock supply faces several major challenges: UCO

prices surged from approximately \$540/tonne in March 2023 to \$1,300/tonne in November 2023 (a 240% increase) amidst fierce global competition for the resource; Europe and the Netherlands are set to implement UCO import quota restrictions starting in 2026, with Chinese UCO exports to Europe projected to contract by another 15% in the first half of 2026; and palm oil prices are influenced by expectations regarding Indonesia's B50 mandate and production fluctuations, with Malaysian palm oil futures trading at approximately 4,149 MYR/tonne as of June 2025.

The cost structure of second-generation biodiesel is characterized by the absolute dominance of feedstock costs, followed by processing costs. Feedstock accounts for over 80% of total production costs, with waste oils and fats offering a distinct cost advantage. Specifically, production costs for first-generation biodiesel (FAME) range from \$480 to \$857 per tonne depending on the feedstock, whereas the cost of second-generation biodiesel (HVO) is roughly double that of FAME, reaching \$1,350 per tonne. The cost breakdown primarily includes: feedstock procurement (approx. 80%-85%), hydrogen consumption (approx. 5%-8%; hydrogen usage rate of 3%-4%), catalysts and chemicals (approx. 3%-5%; utilizing precious metals like Pt and Pd or transition metals such as Ni-W, Ni-Mo, and Co-Mo), energy and utilities (approx. 3%-5%), and depreciation and labor (approx. 3%-5%). Key cost drivers for HVO production include: feedstock-to-product conversion rates (the NExBTL process yields approximately 0.82 tonnes of HVO per tonne of feedstock, consuming 20% more oil/fat than FAME production), hydrogen prices (influenced by natural gas or coal-chemical costs), and precious metal catalyst replacement cycles (fixed-bed reactors face issues with coking and catalyst poisoning/deactivation, while ebullated-bed processes can mitigate these problems but require higher capital investment). Furthermore, raw material pretreatment accounts for a significant portion of hidden costs; 'gutter oil' contains numerous impurities and requires complex pretreatment steps such as dehydration, deacidification, desalting, and degumming which substantially drive up actual production costs. Companies primarily seek to reduce costs by optimizing catalyst efficiency (lowering hydrogen consumption), employing ebullated-bed technology (simplifying pretreatment and reducing pressure drop), and engaging in large-scale raw material procurement and strategic sourcing (such as establishing POME plants in Malaysia); however, raw material price volatility remains the most significant source of uncertainty affecting total costs.

This report studies the global Second Generation Biodiesel(HVO) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Second

Generation Biodiesel(HVO) 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 Second Generation Biodiesel(HVO) that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Second Generation Biodiesel(HVO) total production and demand, 2021-2032, (Kilotons)

Global Second Generation Biodiesel(HVO) total production value, 2021-2032, (USD Million)

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

Global Second Generation Biodiesel(HVO) consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: Second Generation Biodiesel(HVO) domestic production, consumption, key domestic manufacturers and share

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

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

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

This report profiles key players in the global Second Generation Biodiesel(HVO) 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 (FI), Renewable Energy Group (US), Valero Energy (US), Wilmar International (SG), Argent Energy (GB), Diamond Green Diesel (US), Marathon Petroleum (US), Phillips 66 (US), Chevron Renewable Energy Group (US), HF Sinclair (US), 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 Second Generation Biodiesel(HVO) 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 Second Generation Biodiesel(HVO) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Second Generation Biodiesel(HVO) Market, Segmentation by Type:

High Pour Point HVO

Low Pour Point HVO

Global Second Generation Biodiesel(HVO) Market, Segmentation by Feedstock Sources:

Animal Fat

Vegetable Oil

Used Cooking Oil (UCO)

Other

Global Second Generation Biodiesel(HVO) Market, Segmentation by Process Type:

Hydrodeoxygenation (HDO)

Hydroisomerization

Ebullated-bed Hydroprocessing

Other

Global Second Generation Biodiesel(HVO) Market, Segmentation by Application:

Vehicle Fuels

Industrial Fuels

Chemical Industry

SAF

Companies Profiled:

Neste (FI)

Renewable Energy Group (US)

Valero Energy (US)

Wilmar International (SG)

Argent Energy (GB)

Diamond Green Diesel (US)

Marathon Petroleum (US)

Phillips 66 (US)

Chevron Renewable Energy Group (US)

HF Sinclair (US)

Montana Renewables (US)

TotalEnergies (FR)

Enilive / Eni (IT)

Repsol (ES)

Moeve / Cepsa Bio-Oils (ES)

OMV (AT)

EcoCeres (HK)

Braya Renewable Fuels (CA)

Tidewater Renewables (CA)

Parkland / Sunoco Burnaby Refinery (CA)

Euglena (JP)

Idemitsu Kosan (JP)

Longyan Zhuoyue New Energy Co., Ltd. (CN)

Zhejiang Jiaao Enprotech Stock Co., Ltd. (CN)

Shanghai Zhongqi Environmental Technology Co., Ltd. (CN)

Key Questions Answered:

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

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