

# Global Waste-based Biodiesel Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Waste-based Biodiesel market size is expected to reach \$ 39119 million by 2032, rising at a market growth of 7.7% CAGR during the forecast period (2026-2032).

In 2025, global sales volume of waste-based biodiesel reached 18.47 million tonnes, with an average price of \$1,253 per tonne.

Waste-based biodiesel refers to biodiesel produced from inedible biomass waste?such as waste oils and fats, animal fats, used cooking oil (UCO), and 'gutter oil'?via transesterification (first generation, FAME) or hydrodeoxygenation (second generation, HVO/HEFA). Unlike conventional biodiesel derived from edible vegetable oils (palm, soybean, or rapeseed oil), waste-based biodiesel utilizes waste generated during production and consumption. It offers the distinct advantage of not competing with food supplies or arable land and delivers superior lifecycle carbon reduction (70%?90% lower emissions than fossil fuels); consequently, it benefits from 'double counting' policy incentives under regulations such as the EU Renewable Energy Directive (RED III).

Key feedstocks for waste-based biodiesel include used cooking oil (UCO/gutter oil/swill oil), animal fats (beef tallow, lard, mutton fat), palm oil mill effluent (POME) oil, fats/oils/grease (FOG) from food service operations, and industrial waste oils. Regarding feedstock supply, China is the world's largest producer and exporter of UCO; while its theoretical annual production capacity exceeds 8 million tonnes and actual collection/processing volume was approximately 5.4 million tonnes in 2024, collection volumes declined by about 20% year-on-year in 2025 due to poor business conditions in the food service sector. Feedstock supply faces several core challenges: UCO prices surged from approximately \$540/tonne in March 2023 to \$1,300/tonne in November 2023 (a 240% increase). By November 2025, average prices in China stood at roughly

6,456 RMB/tonne for 'gutter oil' (recycled cooking oil from drains/sewers), 6,881 RMB/tonne for swill oil, and 7,920-7,950 RMB/tonne for high-quality UCO at ports. Global competition for feedstock is fierce, with Europe and the Netherlands set to implement UCO import quota restrictions starting in 2026. China eliminated the 13% export tax rebate for UCO in December 2024; based on the 2024 export price of \$897/tonne, exporters lost approximately \$117/tonne in rebate-related profit, meaning more UCO will remain in the domestic market. Furthermore, the feedstock collection system is highly fragmented; upstream suppliers in China are predominantly individual operators (accounting for about 84.5%), resulting in inconsistent feedstock quality and high pretreatment costs.

The cost structure of waste-based biodiesel is characterized by the absolute dominance of raw material costs, followed by processing costs. Direct materials account for as much as 84.3% of biodiesel production costs, with the production of one tonne of biodiesel consuming approximately 0.97 tonnes of UCO; manufacturing overhead and freight account for about 12.5%. For the second-generation HVO process, costs are roughly double those of FAME, reaching approximately \$1,350/tonne. Feedstock costs make up over 80% of this total, while hydrogen consumption accounts for 5-8% (hydrogen usage rate of 3-4%), precious metal catalysts (Pt, Pd, or Ni-Mo, Co-Mo) and chemicals account for 3-5%, energy and utilities for 3-5%, and depreciation and labor for 3-5%. Feedstock pretreatment represents a major hidden cost; 'gutter oil' contains numerous impurities and requires complex pretreatment steps—such as dehydration, deacidification, desalting, and degumming—and this labor-intensive work significantly drives up actual production costs. Enterprises primarily reduce costs through upstream integration (acquiring food waste treatment plants, signing long-term supply agreements), optimizing catalyst efficiency (reducing hydrogen consumption), adopting ebullated-bed processes (simplifying pretreatment), and bulk procurement; however, raw material price volatility and supply stability remain the core challenges facing the industry.

This report studies the global Waste-based Biodiesel production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Waste-based Biodiesel 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 Waste-based Biodiesel that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Waste-based Biodiesel total production and demand, 2021-2032, (Kilotons)

Global Waste-based Biodiesel total production value, 2021-2032, (USD Million)

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

Global Waste-based Biodiesel consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: Waste-based Biodiesel domestic production, consumption, key domestic manufacturers and share

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

Global Waste-based Biodiesel production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global Waste-based Biodiesel production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global Waste-based Biodiesel 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), Cargill (US), Diamond Green Diesel (US), Phillips 66 (US), Marathon Petroleum (US), Chevron Renewable Energy Group (US), TotalEnergies (FR), Eni (IT), Repsol (ES), Moeve / Cepsa Bio-Oils (ES), 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 Waste-based Biodiesel 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 Waste-based Biodiesel Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

#### Global Waste-based Biodiesel Market, Segmentation by Type:

FAME

HVO

SAF

#### Global Waste-based Biodiesel Market, Segmentation by Feedstock Source:

Used Cooking Oil (UCO)

Animal Fat (Tallow)

Palm Oil Mill Effluent (POME) Oil

Other

#### Global Waste-based Biodiesel Market, Segmentation by Process Type:

Transesterification

Hydrodeoxygenation

Hydroisomerization

Ebullated-bed Hydroprocessing

#### Global Waste-based Biodiesel Market, Segmentation by Application:

Industrial Fuels

Transportation Fuels

Chemical Industry

#### Companies Profiled:

Neste (FI)

Cargill (US)

Diamond Green Diesel (US)

Phillips 66 (US)

Marathon Petroleum (US)

Chevron Renewable Energy Group (US)

TotalEnergies (FR)

Eni (IT)

Repsol (ES)

Moeve / Cepsa Bio-Oils (ES)

EcoCeres (HK)

Greenergy (GB)

Argent Energy (GB)

Olleco (GB)

BIO OIL Group (NL)

M?nzer Bioindustrie (AT)

Be8 (BR)

Pacific Biodiesel (US)

Baker Commodities (US)

Lootah Biofuels (AE)

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

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

Hebei Jingu Plasticizer Co., Ltd. (CN)

Anhui Tianyi New Building Materials Co., Ltd. (CN)

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

Tangshan Jinlilai Biodiesel Co., Ltd. (CN)

Shandong Fenghui Equipment Technology Co., Ltd. (CN)

Hebei Longhai Bioenergy Co., Ltd. (CN)

Key Questions Answered:

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

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