



The American BIOFUELS TRADE OUTLOOK



THE TRUMP EFFECT

America is blessed with an abundance of agricultural resources and the hardest-working, most innovative farming community on the planet. Since President Trump took office, biofuels exports have soared like never before seen in the history of our country. In fact, thanks to President Trump's leadership, 2025 was the greatest year of ethanol exports in the history of the United States of America. It is clear that the strategies deployed by the U.S. Department of Agriculture and the Office of the U.S. Trade Representative — in coordination with our wonderful farmers — have driven this success story, which is bringing prosperity to rural communities across this great country.

Secretary of Agriculture Brooke L. Rollins and Under Secretary for Trade and Foreign Agricultural Affairs Luke Lindberg look forward to continuing to work with American farmers and the biofuels sector to advance the key components of this plan, in addition to supporting passage of legislation implementing year-round sales of E15. This plan builds on the success of the historic 2.2 billion gallons of U.S. ethanol that were shipped across the world in 2025, representing \$4.7 billion.

THE BIOFUELS ROADMAP

The American Biofuels Trade Outlook will continue working on these core policy strategies to build on current success with international partners:



Increase On-Road Ethanol Blending



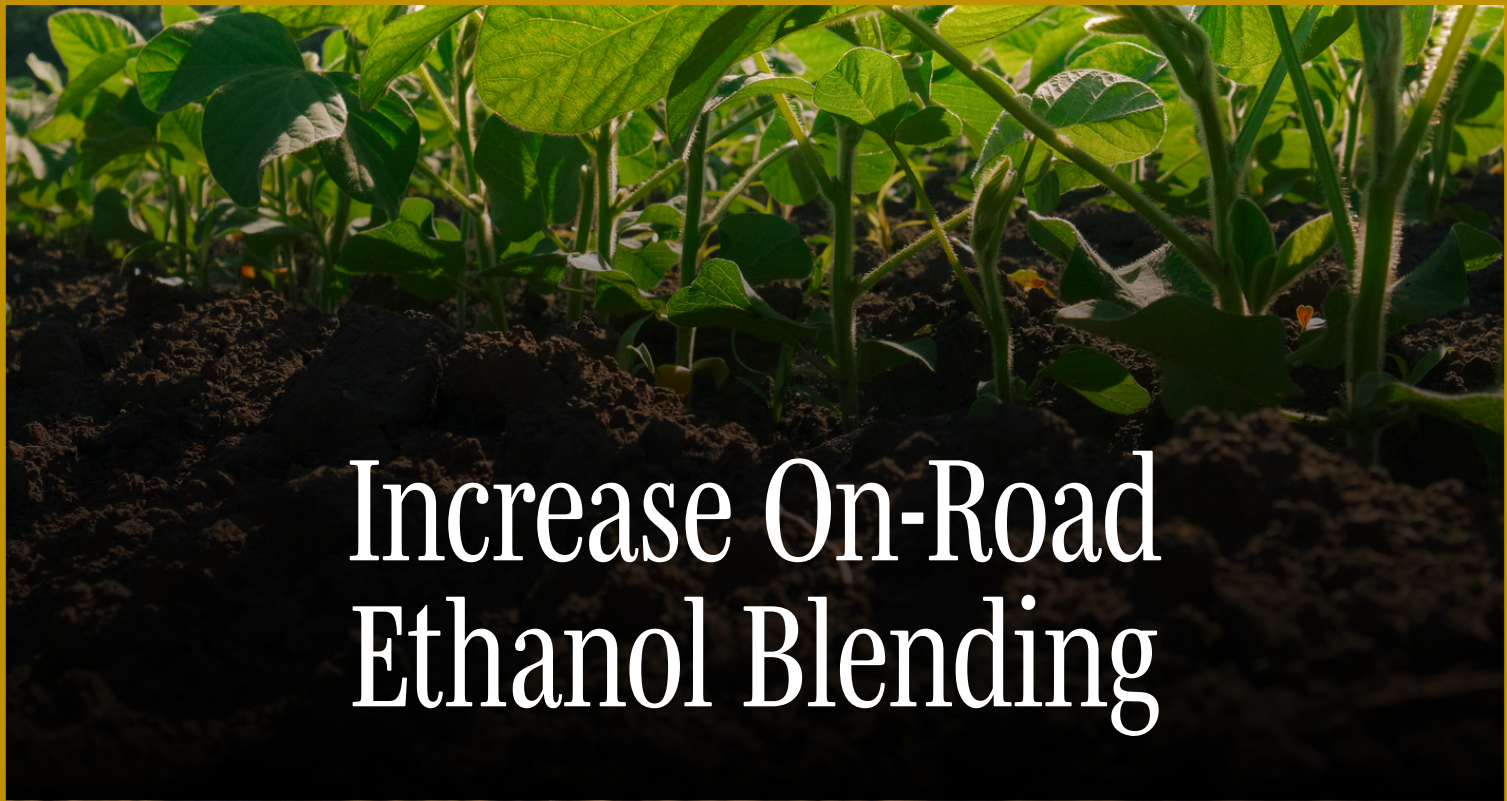
*Reduce and Remove Restrictions
Placed on Crop-Based Biofuels*



Reach Untapped Markets



*Accelerate Opportunities with
International Organizations*



Increase On-Road Ethanol Blending

ACTION: Continue prioritizing breakthrough markets in Latin America and Southeast Asia that are prime for E10 adoption.

ACTION: Continue addressing implementation challenges in markets like Vietnam, and working with the 20 countries at E10 to fully implement their blending policies.

ACTION: Further deepen partnership between Foreign Agricultural Service (FAS) staff and government leaders to prioritize establishing and increasing ethanol blends.



Reduce & Remove Restrictions Placed on Crop-Based Biofuels

ACTION: Continue preventing EU influence over policies adopted by U.S. trading partners that place limits on biofuels and correcting their misinformation campaign.

ACTION: Invest in research, outreach, technical work to maximize international market opportunities.



Reach Untapped Markets

ACTION: Increase technical engagement to help encourage Mexico to adopt increased ethanol blending to expand U.S. ethanol exports.

ACTION: Target high-impact emerging markets in Asia while focusing resources on markets with the largest potential long-term returns such as Indonesia, Japan, and Vietnam.

ACTION: Deepen engagement in India to reduce trade barriers, expand market access, and build demand for U.S. ethanol.

ACTION: Leverage anticipated increases in market development funding to support new marketing initiatives in Pakistan and an ethanol pilot program in Nigeria.



Accelerate Opportunities with International Organizations

ACTION: Continue USDA engagement at the U.N. International Civil Aviation Organization (ICAO) and the U.N. International Maritime Organization (IMO) that supports the inclusion and competitiveness of U.S. biofuels so that other countries, like Brazil, do not design rules that shut out American biofuels.

ACTION: Proceed with investments in research, outreach, and technical work necessary to ensure U.S. biofuels are treated fairly around the world.



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