Leipziger Biokraftstoff-Fachgespräche 2025: Erfahrungsbericht grüne Raffinerien

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Neste's transformation journey

Focused on refining waste and residues into renewable products

Renewables production on three continents

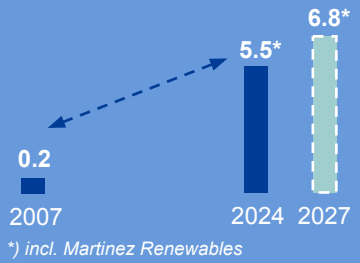
- Rotterdam, the Netherlands
- Singapore
- Porvoo, Finland
- Martinez, CA, U.S. (joint operation)

Our Rotterdam refinery capacity expansion project will further increase the total production capacity of renewable products to

6.8 million tons

in 2027

Renewables production capacity growth, Mt



*) incl. Martinez Renewables

Waste and residues

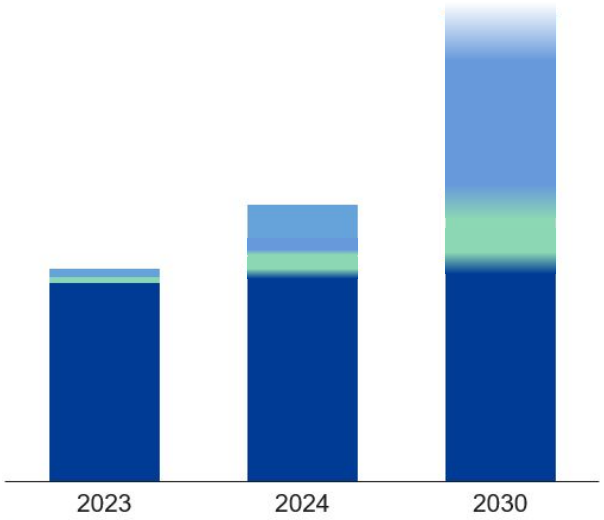
90%

of our annual renewable raw material inputs globally

NESTE

Diversifying Neste's leading portfolio of renewable and circular products

Indicative shares of sales volumes development, Mt



Ambition by 2030

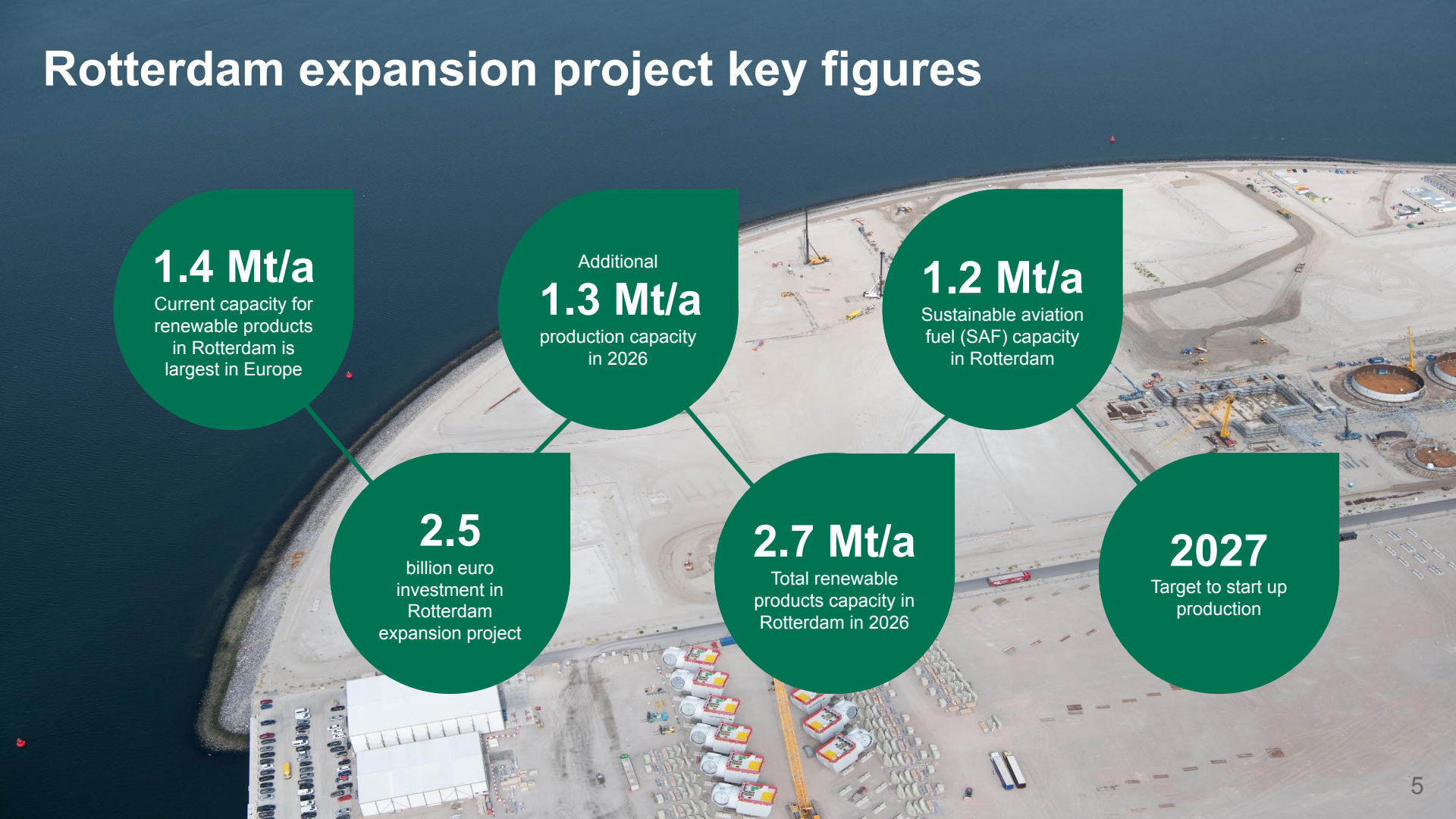
- **Up to 40%** Sustainable aviation fuel
- **10-20%** Renewable and circular feedstock for polymers and chemicals
- **40-50%** Renewable diesel

Unique competitive advantages

Strategic focus on three product segments with understanding of customer and market needs

Global presence, product optionality and global raw material capabilities enable to efficiently serve customers

Rotterdam expansion project key figures

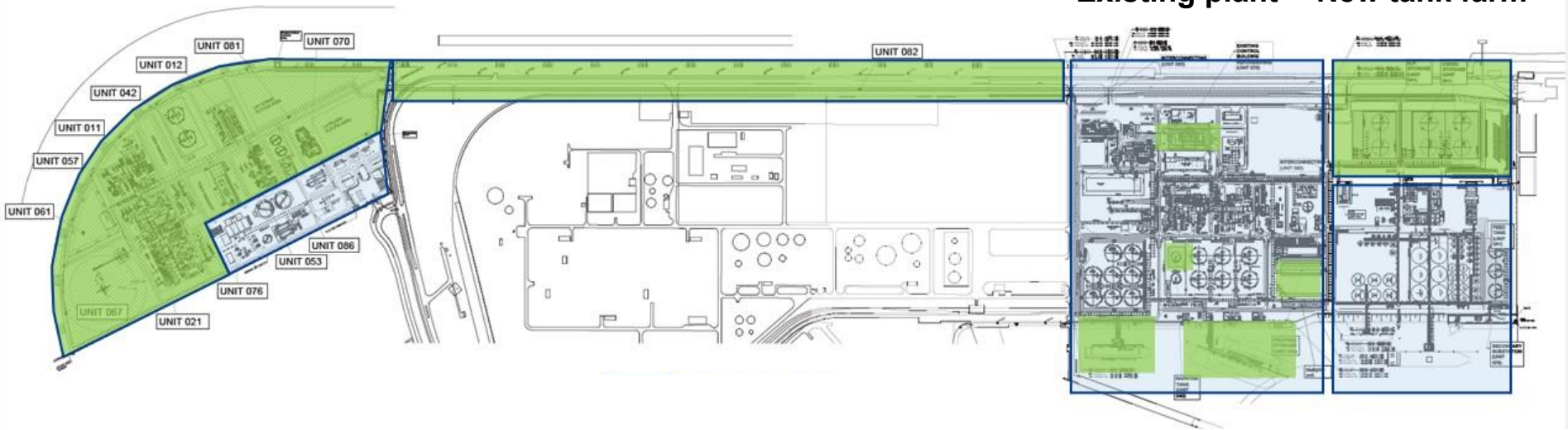


Rotterdam expansion project

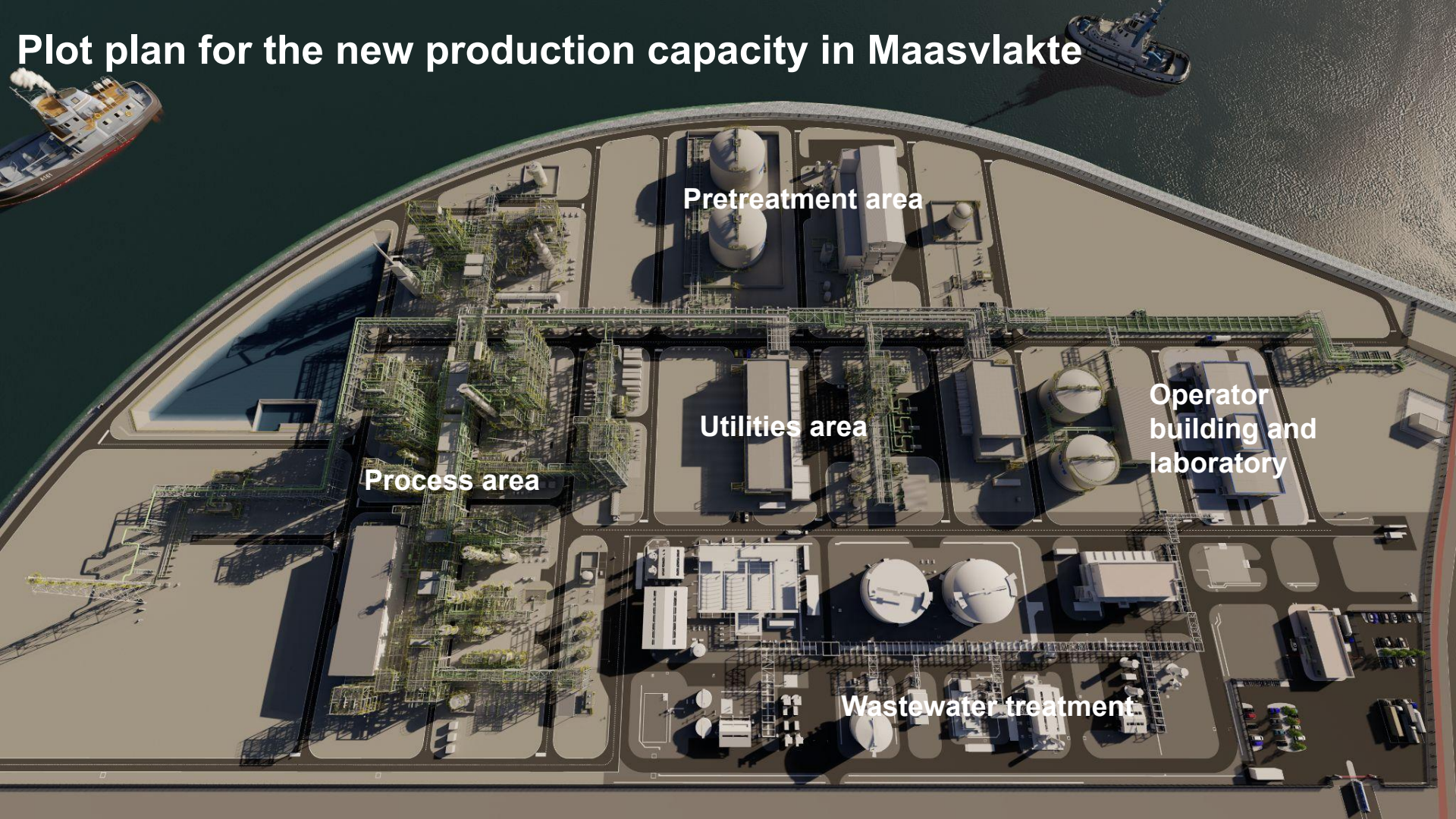
Maasvlakte new area

Existing plant

New tank farm

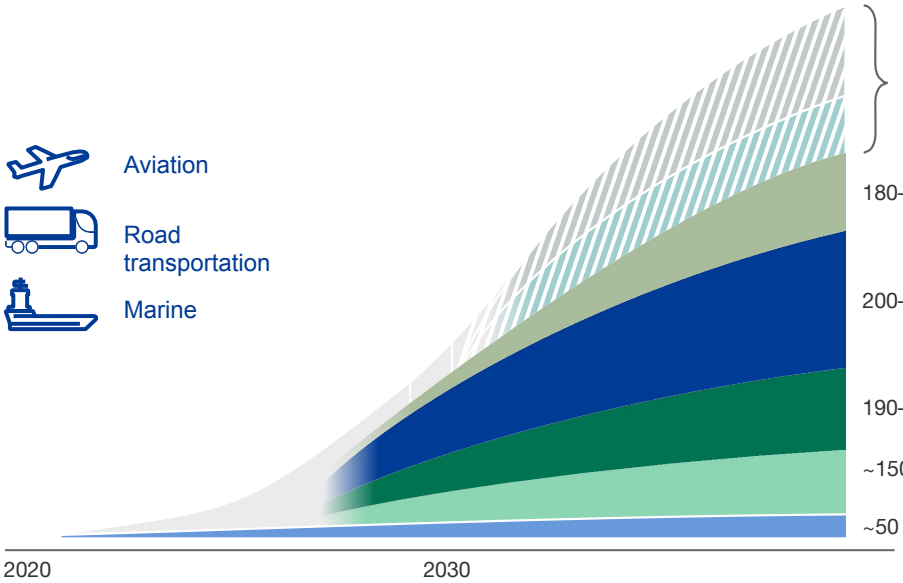


Plot plan for the new production capacity in Maasvlakte



Expanding the raw material pool is necessary

Global raw material potential for renewable fuels (Mtoe)



Long-term fuel potential (Mtoe)

Significant potential for fuel production in the long term

180–275	Power-to-liquids
	Algae
	Cellulosic energy crops
200–400	Lignocellulosic residues (agriculture; forestry)
190–250	Municipal solid waste*
~150	Novel vegetable oils (cover crops; degraded land)
~50	Waste and residue fats and oils

Source: Neste analysis based on WEF Clean Skies for Tomorrow and other sources. Biomass potential converted to fuel potential, using around 85% conversion efficiency (weight-based) for fats and oils and novel vegetable oils; around 25% efficiency for lignocellulosic biomass and municipal solid waste.
*80% organic waste, with 20% non-reusable, non-separable plastic waste

Developing vegetable oils from regenerative agricultural practices

Novel Vegetable Oils

Renewable raw materials produced using regenerative agricultural practices that help restore soil health and increase farm productivity

Neste's approach

64 field trials on 5 continents

Partnerships with the value chain

Scaling the most promising concepts

Continuous focus on sustainability KPIs

Novel vegetable oils could make up 20% of our raw materials pool by 2035

Restoring soil health

Promoting biodiversity

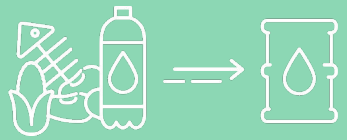
Carbon sequestration in the soil

Increased farm productivity

✓ Product Scalability & ✓ Technical Compatibility
⇒ Enable renewable fuels transition along the value chains

RED III: Pave the way towards climate neutrality

- ➔ Ambitious implementation of "RED III"-targets to pave the way for **all solutions** towards climate neutrality
- ➔ Focus on real GHG-savings instead of double counting & multipliers



Fleet emissions: Greening fleets with renewable fuels

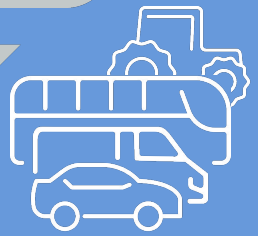
- ➔ Recognize all renewable fuels for fleet emission targets
- ➔ Regulatory framework for vCNF (Carbon Neutral Fuel Vehicle)
- ➔ Implementation of CCF (Carbon Correction Factor)

Up to **90%***

Facilitate comprehensive "Molecular transition"

- ➔ Create solid framework conditions for renewable co-products (SAF, chemicals & polymers)
- ➔ Allow for flexible allocation of renewable solutions across sectors

Encourage users to take charge of the change



- ➔ Differentiate taxation for renewable fuels and fossil fuels
- ➔ Promote switching to renewable fuels in logistics, corporate fleets, agriculture & construction

**The GHG emission reduction varies depending on the region-specific legislation that provides the methodology for the calculations (e.g. EU RED II 2018/2001/EU for Europe and US California LCFS for the US), and the raw material mix used to manufacture the product for each market.*

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