

Assessment of China's Market for Biofuels

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Abstracts

BEIJING- January 4, 2011 – GCiS China Strategic Research has published a study of the China market for biofuels, an emerging alternative energy. Covering both ethanol and biodiesel, this study provides an in-depth look at the trends, participants and forecasts for the industry from 2009 to 2015.

The study finds a large size and growing biofuels market, much of which is due to government mandated ethanol-only areas of northeast and central China and accounts for 20 percent of China's automotive fuel consumption. But the biofuel supply to these areas is a state sanctioned monopoly conferred upon three of China's largest State-owned enterprises: Sinopec, CNPC and the Cofco group. Further, the grain used as a fuel stock in nearly two-thirds of biofuels has been banned in new projects amidst concerns of domestic food price inflation.

In some ways, the biodiesel and ethanol markets sharply contrast each other. Biodiesel suppliers are mostly privately owned, whereas all but one ethanol supplier is state-owned. The ethanol fuel industry is the result of careful state planning and control, while biodiesel is organic and its suppliers are typically opportunistic makers of chemicals.

But both types of biofuels are caught between rising raw material pricing and restrictions and the fixed (and artificially low) pricing of diesel and gasoline, to which biofuels must be pegged. The Chinese government has provided subsidies and tax breaks to both suppliers, although anecdotally, state owned enterprises are favored. Many admit that without such support, biofuels would be a loss-making venture.

Biofuels are officially recognized as a part of China's long term energy security. Opportunities exist for those with the technology to wean China off grain-based ethanol and onto more sustainable feedstocks like cellulosic fiber; for those with the insights into which trends will shape the industry and how select companies will perform; and for

those with the patience to see this embryonic, yet potent market come of age.

About the GCIS China Biofuels Study

This GCiS market study draws on a three month, in-depth primary survey of over 90 of the market's supply side, channel players and end-users. It is essential reading for any professional needing accurate and detailed strategic information on this market. Major areas covered include: market size and shares, five-year projections, market structure, pricing trends, distribution, consumption, an assessment of key suppliers and more.

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