

Coarse Grain Biofuel Market Opportunity, Growth Drivers, Industry Trend Analysis, and Forecast 2025 - 2034

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Abstracts

The Global Coarse Grain Biofuel Market was valued at USD 50.7 billion in 2024 and is estimated to grow at a CAGR of 10.9% to reach USD 142.4 billion by 2034.

Strong growth in the sector is supported by expanding government mandates on fuel blending and increasing feedstock demand for sustainable aviation fuel. As countries ramp up efforts to reduce dependence on fossil fuels, biofuel targets are playing a key role in emissions reduction strategies. Ethanol produced from coarse grains such as corn and sorghum is becoming integral to transport fuel policies, particularly as the aviation sector looks for decarbonization pathways. Regulatory frameworks that promote ethanol-based SAF are helping to expand the role of coarse grain biofuels into new applications beyond road transportation. Growing emphasis on sustainability, national energy security, and the shift toward localized resource utilization are all contributing to a favorable business environment. With international commitments to net-zero targets gaining momentum, industries are accelerating the adoption of low-carbon fuels. Coarse grain-based ethanol, with its significantly lower lifecycle emissions, is emerging as a key component in long-term decarbonization plans across both transportation and industrial ecosystems.

The ethanol-based fuels segment accounted for a 78.6% share in 2024 and is forecast to grow at a CAGR of 11% through 2034. This dominant position is being driven by policy-driven demand and the increasing application of dry mill ethanol production technologies. In the U.S., most ethanol output comes from dry mill plants, which have adopted modern technologies to enhance feedstock conversion efficiency, reduce energy use, and optimize product value. These facilities convert corn and sorghum into ethanol, corn oil, and distillers' grains, delivering both economic and environmental

value to the production chain.

The biodiesel segment will reach USD 25 billion by 2034. While traditional vegetable oils remain a primary input, corn oil, a byproduct of ethanol refining, is seeing expanded use in biodiesel blending. This integration not only boosts the efficiency of feedstock utilization but also aligns with the principles of a circular bioeconomy by minimizing waste and diversifying end uses.

U.S. Coarse Grain Biofuel Market held 93% share in 2024, generating USD 18.7 billion. This leadership is underpinned by a strong alignment of agricultural policy and climate goals, with grain production serving as a strategic advantage. Biofuel initiatives across the U.S. and Canada are closely tied to broader decarbonization plans involving transport, agriculture, and industrial sectors, reinforcing the region's commitment to energy independence and emissions control.

Key companies in the Coarse Grain Biofuel Market include Verbio, Chevron, Praj Industries, Clariant, POET, TotalEnergies, FutureFuel, Wilmar International, The Andersons, ADM, Neste, My Eco Energy, Borregaard, Zilor, BTG Bioliquids, Munzer Bioindustrie, UPM, CropEnergies, COFCO, and Cargill. To solidify their position in the Global Coarse Grain Biofuel Market, major players are deploying several focused strategies. Companies are heavily investing in technology upgrades, particularly in dry mill and fermentation systems, to improve process efficiencies and product yields. Expanding their feedstock base and incorporating co-products like corn oil into biodiesel chains is helping increase operational value. Many firms are also collaborating with government bodies to align product development with regulatory goals, especially in the SAF segment.

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