

Fuel Ethanol Market Analysis By Product (Starch-Based, Sugar-Based, Cellulosic), By Application (Conventional Vehicles, Flexible Fuel Vehicles), By Region, And Segment Forecasts, 2014 - 2025

<https://marketpublishers.com/r/F61D55E75BCEN.html>

Date: August 2017

Pages: 80

Price: US\$ 5,950.00 (Single User License)

ID: F61D55E75BCEN

Abstracts

The global ethanol fuel market is expected to reach USD 115.65 billion by 2025, growing at a CAGR of 6.7%, according to a new report by Grand View Research, Inc. Asia Pacific is estimated to witness a fast paced growth during the forecast period. China, India, and Philippines are the key countries that are considered to positively impact the industry growth in the future.

The government of India is currently drawing efforts on enhancing the use of ethyl alcohol as an automotive fuel. The National Policy on Biofuels was implemented in India in 2009, which stated that the oil manufacturing companies were required to distribute petrol blended with a minimum of 5% ethyl alcohol. Furthermore, this policy proposed a target of 20% increase in the blending rate by the end of 2017 in the country.

Growth of the automotive industry in India is another vital factor that is expected to enhance the consumption of the product over the years ahead. Government of India is focusing on making automobile sector as one of the major drivers of the 'Make in India' initiative. The manufacturing output of passenger vehicles is likely to reach approximately 9.4 million units by the end of 2026, as stated by the Auto Mission Plan (AMP) 2016-26.

Significant blending mandates in Australia, China, and Philippines are considered to drive the market demand during the forecast period. Australia currently has an E7 ethanol blending mandate implemented in New South Wales. Furthermore, Australia focuses on reaching a 10% biofuels mandate by the end of 2020. In China, nine

provinces have proposed a 10% ethanol blends that include Jilin, Henan, Heilongjiang, Liaoning, and Anhui.

Further key findings from the report suggest:

In terms of volume, sugar-based segment is expected to rise at a CAGR of 5.4% from 2017 to 2025. In terms of revenue, the product demand is expected to reach USD 24.44 billion by the end of 2025.

Technological advancement in the production of ethyl alcohol from lignocellulosic raw materials is expected to propel the industry growth during the forecast period

In 2012, DuPont commenced the construction of its cellulosic ethyl alcohol facility in Iowa, U.S., that utilizes corn stover as a raw material source and has an anticipated annual manufacturing capacity of 30 million gallons per year. The construction of this manufacturing plant is anticipated to be completed by the end of 2017.

India is likely to witness fast paced growth in terms of product demand over the years ahead. In 2016, the Union Minister of Road Transport & Highways and Shipping announced the Indian Government is focusing on increasing the ethanol blend rate in petrol to 22.5% in the future.

Abundant availability of raw material substitutes is estimated to lower the bargaining power of suppliers over the years ahead. Barrier for new entrants is estimated to remain high over the years ahead, as longer duration is required to achieve economies of scale.

Companies are focusing on business growth by implementing various growth strategies such as forward and backward integration of business operations, acquisition, technology licensing, and distribution agreements.

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