

# **North America Renewable Diesel Market by feedstock (Waste oils, Vegetable oils), and Country (United States, Canada, Mexico) - Forecast to 2044**

<https://marketpublishers.com/r/NDDBD1AF6D66EN.html>

Date: March 2023

Pages: 123

Price: US\$ 4,950.00 (Single User License)

ID: NDDBD1AF6D66EN

## **Abstracts**

The North America Renewable diesel market size is projected to grow from USD 12.9 Billion in 2022 to USD 49.1 Billion by 2044, at a CAGR of 7.1% during the forecast year. Used cooking oil is a good source of raw material used for renewable diesel production. Finding feedstocks to sustain production is one of the major problems the biofuel sector is experiencing. Conventional feedstocks such as soy oil are not economically viable. Animal or recycled fats and used cooking oil are the more appealing alternative feedstock.

“By Feedstock, Waste Oil segment has the largest share in North America Renewable diesel market in 2022.”

Tallow, used cooking oil, fish oil, lard, and poultry are considered under the waste oil segment. The Waste oil segment market will increase as the many biofuels suffer sustainability issues owing to high feedstock costs and the competition of some bio feedstocks with food supplies. Waste-based biofuel feedstocks, such as animal fats, yellow grease, manure, wastewater treatment sludge, municipal solid waste, crop residue, and forest residue, can play an essential role in growing biofuel feedstocks and ensuring the biofuel industry's long-term growth.

“US Renewable diesel market is projected to have largest market share during the forecast period.”

The US dominates the renewable diesel market in North America and is expected to continue its dominance during the forecast period. The waste oils segment is considered a potential feedstock for the production of renewable diesel. According to

the US Energy Information Administration, at the end of 2020, the US renewable diesel production capacity totaled nearly 0.6 billion gallons per year (gal/y) or 38,000 barrels per day (b/d). Several projects currently under construction could increase this capacity by 2.4 billion gal/y; proposed and announced projects would add another 1.8 billion gal/y by 2024. The US renewable diesel production would total 5.1 billion gal/y (330,000 b/d) by the end of 2024.

In-depth interviews were performed with Chief Executive Officers (CEOs), marketing directors, other innovation and technology directors, and executives from several key organizations working in the North America Renewable diesel market.

By Department: Tier 1: 30%, Tier 2: 50%, Tier 3: 20%

By Designation: Directors: 20%, CXOs: 40%, and Others: 40%

By Region: US: 60%, Canada: 30%, Mexico: 10%,

The North America Renewable diesel market comprises major manufacturers, such as Neste Oyj (Finland), Chevron Group (Renewable Energy Group) (US), PBF Energy Inc. (US), Valero Energy Corporation (US), Gevo, Inc (US), Phillips 66 (US), Marathon Petroleum Corporation (US), Aemetis, Inc. (US).

## Research Coverage

The market study covers the North America Renewable diesel market across various segments. It aims at estimating the market size and the growth potential of this market across different segments based on type, generation, application, and region. The study also includes an in-depth competitive analysis of key players in the market, along with their company profiles, key observations related to their products and business offerings, recent developments undertaken by them, and key growth strategies adopted by them to enhance their position in the North America Renewable diesel market.

## Key Benefits of Buying the Report

The report is projected to help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers of the overall North America Renewable diesel market and its segments and sub-segments. This report is projected to help stakeholders understand the market's competitive landscape and gain

insights to improve the position of their businesses and plan suitable go-to-market strategies. The report also aims at helping stakeholders understand the pulse of the market and provides them with information on the key market drivers, challenges, and opportunities.

## Contents

### 1 INTRODUCTION

#### 1.1 STUDY OBJECTIVES

#### 1.2 MARKET DEFINITION

##### 1.2.1 RENEWABLE DIESEL MARKET: INCLUSIONS AND EXCLUSIONS

#### 1.3 STUDY SCOPE

##### 1.3.1 RENEWABLE DIESEL MARKET SEGMENTATION

#### 1.4 YEARS CONSIDERED

#### 1.5 CURRENCY CONSIDERED

#### 1.6 LIMITATIONS

#### 1.7 STAKEHOLDERS

### 2 RESEARCH METHODOLOGY

#### 2.1 RESEARCH DATA

##### FIGURE 1 NORTH AMERICA RENEWABLE DIESEL MARKET: RESEARCH DESIGN

##### 2.1.1 SECONDARY DATA

###### 2.1.1.1 Critical secondary inputs

###### 2.1.1.2 Key data from secondary sources

##### 2.1.2 PRIMARY DATA

###### 2.1.2.1 Critical primary inputs

###### 2.1.2.2 Key data from primary sources

###### 2.1.2.3 Key industry insights

###### 2.1.2.4 Breakdown of primary interviews

##### FIGURE 2 BREAKDOWN OF PRIMARY INTERVIEWS

#### 2.2 MARKET SIZE ESTIMATION

##### FIGURE 3 MARKET SIZE ESTIMATION: BOTTOM-UP APPROACH

##### FIGURE 4 MARKET SIZE ESTIMATION: TOP-DOWN APPROACH

#### 2.3 DATA TRIANGULATION

##### FIGURE 5 NORTH AMERICA RENEWABLE DIESEL MARKET: DATA TRIANGULATION

#### 2.4 RESEARCH ASSUMPTIONS

#### 2.5 LIMITATIONS

#### 2.6 RECESSION IMPACT

### 3 EXECUTIVE SUMMARY

FIGURE 6 WASTE OIL SEGMENT ACCOUNTED FOR LARGER SHARE IN 2022

FIGURE 7 NORTH AMERICA: RENEWABLE DIESEL MARKET, 2023–2044

## **4 PREMIUM INSIGHTS**

### **4.1 ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN RENEWABLE DIESEL MARKET**

FIGURE 8 INCREASING FOCUS ON REDUCING CARBON EMISSIONS TO DRIVE RENEWABLE DIESEL MARKET GROWTH

### **4.2 NORTH AMERICA: RENEWABLE DIESEL MARKET, BY TYPE AND COUNTRY, 2022**

FIGURE 9 WASTE OIL SEGMENT ACCOUNTED FOR DOMINANT SHARE OF RENEWABLE DIESEL MARKET IN 2022

### **4.3 RENEWABLE DIESEL MARKET, BY KEY COUNTRIES**

FIGURE 10 CANADA TO REGISTER HIGHER CAGR IN NORTH AMERICA RENEWABLE DIESEL MARKET

## **5 MARKET OVERVIEW**

### **5.1 INTRODUCTION**

### **5.2 MARKET DYNAMICS**

FIGURE 11 DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES IN RENEWABLE DIESEL MARKET

#### **5.2.1 DRIVERS**

5.2.1.1 Increasing focus on reducing carbon emissions

5.2.1.2 Growth of automotive industry

FIGURE 12 GLOBAL AUTOMOBILE PRODUCTION (UNITS)

5.2.1.3 Environment friendly and better performance compared with biodiesels

5.2.1.4 Tax credits by governments and investments in renewable energy

#### **5.2.2 RESTRAINTS**

5.2.2.1 Limited availability of renewable diesel

5.2.2.2 Lack of proper infrastructure

#### **5.2.3 OPPORTUNITIES**

5.2.3.1 Enhancing supply chain of renewable diesel

#### **5.2.4 CHALLENGES**

5.2.4.1 Insufficient availability of feedstocks

5.2.4.2 Requirement for wastewater treatment facilities

5.2.4.3 Availability of substitutes

5.2.4.4 Finding suitable location for producing renewable diesel

## 5.3 INDUSTRY TRENDS

### 5.3.1 PORTER'S FIVE FORCES ANALYSIS

FIGURE 13 PORTER'S FIVE FORCES ANALYSIS: RENEWABLE DIESEL MARKET

TABLE 1 RENEWABLE DIESEL MARKET: PORTER'S FIVE FORCE ANALYSIS

5.3.1.1 Bargaining power of suppliers

5.3.1.2 Bargaining power of buyers

5.3.1.3 Threat of new entrants

5.3.1.4 Threat of substitutes

5.3.1.5 Intensity of competitive rivalry

## 5.4 SUPPLY CHAIN ANALYSIS

FIGURE 14 RENEWABLE DIESEL SUPPLY CHAIN

## 5.5 TECHNOLOGY ANALYSIS

TABLE 2 COMPARISON OF PROPERTIES: PETROLEUM DIESEL, BIODIESEL, AND RENEWABLE DIESEL

## 5.6 PRICING ANALYSIS

TABLE 3 NATIONAL AVERAGE PRICE BETWEEN OCTOBER 1 AND OCTOBER 15, 2022

## 5.7 PATENT ANALYSIS

5.7.1 INTRODUCTION

5.7.2 METHODOLOGY

5.7.3 DOCUMENT TYPE

TABLE 4 GRANTED PATENTS ACCOUNTED FOR 41.8 % OF ALL PATENTS IN LAST 10 YEARS

FIGURE 15 NUMBER OF PATENTS PUBLISHED FROM 2013 TO 2023

FIGURE 16 NUMBER OF PATENTS PUBLISHED, YEAR-WISE (2012-2022)

5.7.4 INSIGHTS

5.7.5 JURISDICTION ANALYSIS

FIGURE 17 PATENT ANALYSIS, BY TOP JURISDICTIONS

5.7.6 TOP COMPANIES/APPLICANTS

FIGURE 18 TOP 10 COMPANIES/APPLICANTS WITH HIGHEST NUMBER OF PATENTS

## 5.8 REGULATORY LANDSCAPE

5.8.1 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 5 LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

## 5.9 ECOSYSTEM MAPPING

FIGURE 19 RENEWABLE DIESEL MARKET: ECOSYSTEM MAP

## 5.10 TRENDS/DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES

## FIGURE 20 RENEWABLE DIESEL MARKET: TRENDS IMPACTING CUSTOMER'S BUSINESS

### 5.11 TRADE ANALYSIS

#### 5.11.1 IMPORT SCENARIO

TABLE 6 IMPORT SCENARIO FOR HS CODE 382600, BY COUNTRY, 2017–2021 (USD THOUSAND)

#### 5.11.2 EXPORT SCENARIO

TABLE 7 EXPORT SCENARIO FOR HS CODE: 382600, BY COUNTRY, 2017–2021 (USD THOUSAND)

### 5.12 KEY CONFERENCES AND EVENTS, 2022–2023

TABLE 8 RENEWABLE DIESEL MARKET: DETAILED LIST OF CONFERENCES AND EVENTS

### 5.13 MACROECONOMIC OVERVIEW

TABLE 9 GDP GROWTH: ANNUAL PERCENTAGE CHANGE PROJECTION WORLDWIDE

### 5.14 CASE STUDY

5.14.1 RENEWABLE DIESEL AIDING IN REDUCING GREENHOUSE GAS EMISSIONS BY USE IN PRIVATE FLEET IN CALIFORNIA

### 5.15 ADJACENT AND CONNECTED MARKETS

### 5.16 TENOR OF SALES CONTRACTS

TABLE 10 SUSTAINABLE AVIATION FUEL (SAF)

TABLE 11 RENEWABLE DIESEL

## 6 RENEWABLE DIESEL MARKET, BY FEEDSTOCK

### 6.1 INTRODUCTION

FIGURE 21 WASTE OIL SEGMENT DOMINATED RENEWABLE DIESEL MARKET IN 2022

### 6.2 WASTE OIL

#### 6.2.1 TALLOW

#### 6.2.2 USED COOKING OIL

#### 6.2.3 FISH OIL

### 6.3 VEGETABLE OIL

TABLE 12 RENEWABLE DIESEL MARKET SIZE, BY FEEDSTOCK, 2020–2044 (GALLON MILLION)

TABLE 13 RENEWABLE DIESEL MARKET SIZE, BY FEEDSTOCK, 2020–2044 (USD MILLION)

## 7 RENEWABLE DIESEL MARKET, BY REGION

## 7.1 INTRODUCTION

## 7.2 NORTH AMERICA

### FIGURE 22 NORTH AMERICA: RENEWABLE DIESEL MARKET SNAPSHOT

TABLE 14 NORTH AMERICA: RENEWABLE DIESEL MARKET SIZE, BY COUNTRY, 2020–2044 (MILLION GALLON)

TABLE 15 NORTH AMERICA: RENEWABLE DIESEL MARKET SIZE, BY COUNTRY, 2020–2044 (USD MILLION)

#### 7.2.1 US

7.2.1.1 To dominate market during forecast period

TABLE 16 US RENEWABLE DIESEL FUEL AND OTHER BIOFUEL PLANT PRODUCTION CAPACITY ((JANUARY 1, 2022)

TABLE 17 US: RENEWABLE DIESEL MARKET SIZE, BY FEEDSTOCK, 2020–2044 (MILLION GALLON)

TABLE 18 US: RENEWABLE DIESEL MARKET SIZE, BY FEEDSTOCK, 2020–2044 (USD MILLION)

#### 7.2.2 CANADA

7.2.2.1 Clean fuel standard to reduce country's greenhouse gas emissions

TABLE 19 CANADA: RENEWABLE DIESEL MARKET SIZE, BY FEEDSTOCK, 2020–2044 (MILLION GALLON)

TABLE 20 CANADA: RENEWABLE DIESEL MARKET SIZE, BY FEEDSTOCK, 2020–2044 (USD MILLION)

#### 7.2.3 MEXICO

## 8 COMPETITIVE LANDSCAPE

### 8.1 INTRODUCTION

### 8.2 STRATEGIES ADOPTED BY KEY PLAYERS

FIGURE 23 OVERVIEW OF STRATEGIES ADOPTED BY KEY PLAYERS IN RENEWABLE DIESEL MARKET

### 8.3 KEY STRATEGIES ADOPTED BY KEY MARKET PLAYERS

TABLE 21 STRATEGIC POSITIONING OF KEY PLAYERS

### 8.4 COMPANY EVALUATION QUADRANT

#### 8.4.1 STARS

#### 8.4.2 PERVASIVE PLAYERS

#### 8.4.3 EMERGING LEADERS

#### 8.4.4 PARTICIPANTS

FIGURE 24 RENEWABLE DIESEL MARKET: COMPANY EVALUATION QUADRANT, 2022



## 8.5 START-UPS/SMALL AND MEDIUM-SIZED ENTERPRISES (SMES) EVALUATION QUADRANT

### 8.5.1 RESPONSIVE COMPANIES

### 8.5.2 DYNAMIC COMPANIES

### 8.5.3 STARTING BLOCKS

### 8.5.4 PROGRESSIVE COMPANIES

## FIGURE 25 START-UPS AND SMALL AND MEDIUM-SIZED ENTERPRISES (SMES) EVALUATION MATRIX, 2022

## 8.6 REVENUE ANALYSIS OF TOP PLAYERS

## FIGURE 26 REVENUE ANALYSIS OF KEY COMPANIES, 2019–2021

## 8.7 COMPETITIVE BENCHMARKING

## TABLE 22 RENEWABLE DIESEL MARKET: LIST OF KEY PLAYERS

## TABLE 23 RENEWABLE DIESEL MARKET: COMPETITIVE BENCHMARKING OF KEY PLAYERS

## 8.8 COMPETITIVE SITUATION AND TRENDS

### 8.8.1 PRODUCT LAUNCHES

## TABLE 24 RENEWABLE DIESEL MARKET: PRODUCT LAUNCHES

### 8.8.2 DEALS, 2019–2022

## TABLE 25 RENEWABLE DIESEL MARKET: DEALS

### 8.8.3 OTHER DEVELOPMENTS, 2019–2022

## TABLE 26 RENEWABLE DIESEL MARKET: OTHER DEVELOPMENTS

## 9 COMPANY PROFILES

(Business Overview, Products Offered, Recent Developments, MnM View, Right to win, Strategic choices, Weaknesses and competitive threats) \*

### 9.1 KEY PLAYERS

#### 9.1.1 NESTE OYJ

## TABLE 27 NESTE OYJ: COMPANY OVERVIEW

## FIGURE 27 NESTE OYJ: COMPANY SNAPSHOT

## TABLE 28 NESTE OYJ: PRODUCTS OFFERED

## TABLE 29 NESTE OYJ: DEALS

#### 9.1.2 CHEVRON GROUP (RENEWABLE ENERGY GROUP)

## TABLE 30 CHEVRON GROUP (RENEWABLE ENERGY GROUP): COMPANY OVERVIEW

## FIGURE 28 CHEVRON GROUP (RENEWABLE ENERGY GROUP): COMPANY SNAPSHOT

## TABLE 31 CHEVRON GROUP (RENEWABLE ENERGY GROUP): PRODUCTS OFFERED

TABLE 32 CHEVRON GROUP (RENEWABLE ENERGY GROUP): DEALS  
TABLE 33 CHEVRON GROUP (RENEWABLE ENERGY GROUP): PRODUCT  
LAUNCHES

9.1.3 PBF ENERGY INC.

TABLE 34 PBF ENERGY INC.: COMPANY OVERVIEW  
FIGURE 29 PBF ENERGY INC.: COMPANY SNAPSHOT  
TABLE 35 PBF ENERGY INC.: PRODUCTS OFFERED  
TABLE 36 PBF ENERGY INC.: DEALS  
TABLE 37 PBF ENERGY INC.: OTHERS

9.1.4 VALERO ENERGY CORPORATION

TABLE 38 VALERO ENERGY CORPORATION: COMPANY OVERVIEW  
FIGURE 30 VALERO ENERGY CORPORATION: COMPANY SNAPSHOT  
TABLE 39 VALERO ENERGY CORPORATION: OTHERS

9.1.5 GEVO, INC.

TABLE 40 GEVO, INC.: COMPANY OVERVIEW  
FIGURE 31 GEVO, INC.: COMPANY SNAPSHOT  
TABLE 41 GEVO, INC.: PRODUCTS OFFERED  
TABLE 42 GEVO, INC.: DEALS

9.1.6 PHILLIPS 66

TABLE 43 PHILLIPS 66: COMPANY OVERVIEW  
FIGURE 32 PHILLIPS 66: COMPANY SNAPSHOT  
TABLE 44 PHILLIPS 66: PRODUCTS OFFERED  
TABLE 45 PHILLIPS 66: DEALS  
TABLE 46 PHILLIPS 66: OTHERS

9.1.7 MARATHON PETROLEUM CORPORATION

TABLE 47 MARATHON PETROLEUM CORPORATION: COMPANY OVERVIEW  
FIGURE 33 MARATHON PETROLEUM CORPORATION: COMPANY SNAPSHOT  
TABLE 48 MARATHON PETROLEUM CORPORATION: PRODUCTS OFFERED  
TABLE 49 MARATHON PETROLEUM CORPORATION: DEALS  
TABLE 50 MARATHON PETROLEUM CORPORATION: OTHERS

9.1.8 AEMETIS, INC.

TABLE 51 AEMETIS, INC.: COMPANY OVERVIEW  
FIGURE 34 AEMETIS, INC.: COMPANY SNAPSHOT  
TABLE 52 AEMETIS, INC.: PRODUCTS OFFERED  
TABLE 53 AEMETIS, INC.: DEALS  
TABLE 54 AEMETIS, INC.: OTHERS

9.1.9 SHELL PLC

TABLE 55 SHELL PLC: COMPANY OVERVIEW  
FIGURE 35 SHELL PLC: COMPANY SNAPSHOT

TABLE 56 SHELL PLC: PRODUCTS OFFERED

TABLE 57 SHELL PLC: DEALS

TABLE 58 SHELL PLC: OTHERS

9.1.10 GLOBAL CLEAN ENERGY HOLDINGS, INC.

TABLE 59 GLOBAL CLEAN ENERGY HOLDINGS, INC.: COMPANY OVERVIEW

TABLE 60 GLOBAL CLEAN ENERGY HOLDINGS, INC.: PRODUCTS OFFERED

TABLE 61 GLOBAL CLEAN ENERGY HOLDINGS, INC.: DEALS

9.2 OTHER PLAYERS

9.2.1 VERBIO VEREINIGTE BIOENERGIE AG (VERBIO AG)

TABLE 62 VERBIO VEREINIGTE BIOENERGIE AG (VERBIO AG): COMPANY OVERVIEW

9.2.2 CANADA CLEAN FUELS INC

TABLE 63 CANADA CLEAN FUELS INC: COMPANY OVERVIEW

9.2.3 FORGE HYDROCARBONS CORPORATION

TABLE 64 FORGE HYDROCARBONS CORPORATION: COMPANY OVERVIEW

9.2.4 CARGILL, INCORPORATED

TABLE 65 CARGILL, INCORPORATED: COMPANY OVERVIEW

9.2.5 GENUINE BIO-FUEL INC.

TABLE 66 GENUINE BIO-FUEL INC.: COMPANY OVERVIEW

9.2.6 ROCKY MOUNTAIN SUSTAINABLE ENTERPRISES, LLC

TABLE 67 ROCKY MOUNTAIN SUSTAINABLE ENTERPRISES, LLC: COMPANY OVERVIEW

9.2.7 FARMERS UNION INDUSTRIES LLC

TABLE 68 FARMERS UNION INDUSTRIES LLC: COMPANY OVERVIEW

9.2.8 AMERICAN GREENFUELS, LLC

TABLE 69 AMERICAN GREENFUELS, LLC: COMPANY OVERVIEW

9.2.9 SMISSON-MATHIS ENERGY SOLUTIONS

TABLE 70 SMISSON-MATHIS ENERGY SOLUTIONS: COMPANY OVERVIEW

9.2.10 IMPERIAL OIL LTD.

TABLE 71 IMPERIAL OIL LTD.: COMPANY OVERVIEW

9.2.11 LOWER MAINLAND BIODIESEL INC

TABLE 72 LOWER MAINLAND BIODIESEL INC: COMPANY OVERVIEW

\*Details on Business Overview, Products Offered, Recent Developments, MnM View, Right to win, Strategic choices, Weaknesses and competitive threats might not be captured in case of unlisted companies.

## 10 APPENDIX

### 10.1 DISCUSSION GUIDE

10.2 KNOWLEDGESTORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL

10.3 CUSTOMIZATION OPTIONS

10.4 RELATED REPORTS

10.5 AUTHOR DETAILS

## I would like to order

Product name: North America Renewable Diesel Market by feedstock (Waste oils, Vegetable oils), and Country (United States, Canada, Mexico) - Forecast to 2044

Product link: <https://marketpublishers.com/r/NDDBD1AF6D66EN.html>

Price: US\$ 4,950.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/NDDBD1AF6D66EN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:  
Last name:  
Email:  
Company:  
Address:  
City:  
Zip code:  
Country:  
Tel:  
Fax:  
Your message:

**\*\*All fields are required**

Customer signature \_\_\_\_\_

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below and fax the completed form to +44 20 7900 3970

