

# World Biofuels Market

<https://marketpublishers.com/r/W09D4D6F454EN.html>

Date: February 2013

Pages: 138

Price: US\$ 3,960.00 (Single User License)

ID: W09D4D6F454EN

## Abstracts

Three quarters of the 27.9 billion gallon global biofuels market of 2012 was for bioethanol, with the remaining quarter consisting of biodiesel sales. The U.S. and Brazil dominate the bioethanol market, with the two countries accounting for 85% of production and 82% of global consumption. This makes the global fuel ethanol market very reliant on the markets of these two countries, a difficult prospect since Brazil's bioethanol market has been in decline since 2009 and the U.S. market has stagnated since 2010. In the U.S., the biggest issues are the "blend wall" and the poor corn harvest of 2012. In Brazil, a combination of successive poor sugarcane harvests, strong international sugar prices and a smaller domestic price spread between ethanol and gasoline has seen a growing number of motorists choosing to use gas rather than ethanol for their flex-fuel vehicles in the last four years.

Europe, spearheaded by Germany and France, is the largest biodiesel producer in the world, as well as the largest market. However, market growth for biodiesel has slowed considerably since 2009 as EU policy moves away from supporting biofuels produced from food feedstocks such as rapeseed oil, while domestic biodiesel production has declined since 2010 because of the influx of cheaper biodiesel imports from Argentina and Indonesia. New regulations coming into effect in 2013 will limit the amount of mandated biodiesel producers can make from food crops, and will cause depressed conditions for the region's biodiesel market through to 2020.

The forecast for the global biofuels market over the next decade is one of only single digit growth, as consumption in the U.S. and Brazil for bioethanol, and consumption in the EU for biodiesel, experience only modest gains. Less political support for biofuels in most of the key regional markets for both bioethanol and biodiesel is going to slow growth of the global biofuels market through the next decade and result in a total of 41.7 billion gallons sold in 2022, a CAGR of just 4.0% between 2013 and 2022.

World Biofuels Market by SBI Energy provides key insight into current and future trends for both the production and sales of biofuels and biofuel blends in key geographic segments around the world. The analysis includes definitions, current product offerings and market detail on the following liquid biofuel segments:

Bio-based ethanol, including both pure bioethanol fuels and blends of bioethanol and gasoline

Diesel fuel created through transesterification or hydrotreating of plant and animal oils

The report also studies the key elements driving biofuels adoption, pricing and employment within the biofuels sector.

## **Report Methodology**

This report contains primary and secondary data obtained from government sources, trade associations and publications, business journals, scientific papers, company literature, investment reports and interviews with industry professionals. Statistics on biofuel production primarily comes from the U.S. Energy Information Administration, Brazil's National Agency for Oil, Natural Gas and Biofuels (ANP) and Ministry of Agriculture, Livestock and Supply (MAPA), Eurostat, other national statistics offices and various national biofuel trade associations. Price data for biofuels, feedstocks and coproducts comes from a number of sources including the U.S. Department of Agriculture, and the International Monetary Fund (IMF).

## **What You'll Get in This Report**

World Biofuels Market provides a concise, focused look at the global production and sales of liquid biofuels, as it exists today, and shows where the market is moving between 2013 and 2022. The report highlights key players in bioethanol and biodiesel production and pinpoints ways that current and prospective competitors can capitalize on recent trends and spearhead new ones. No other market research report provides both the comprehensive analysis and extensive data that World Biofuels Market offers. In addition, you'll benefit from extensive data presented in easy-to-read and practical charts, tables and graphs.

## **How You'll Benefit from this Report**

If your company is involved with biofuel production or distribution, or is considering investing in companies working within the biofuels industry, you will find this report invaluable as it provides a comprehensive package of information and insight not offered in any other single source. You will gain a thorough understanding of the current biofuels market in key countries such as the U.S. and Brazil, as well as projected trends through 2022. The report also provides a concise view of the employment provided by liquid biofuel production and sales.

**This report will help:**

Marketing managers identify market opportunities and develop targeted promotional plans for businesses looking to expand their target markets.

Research and development professionals stay on top of competitor initiatives, explore new biofuel demand and understand key legislation mandating biofuel use in target countries.

Advertising agencies working with clients in a host of market sectors such as plant construction, fuel distribution, procurement and environmental assessment to develop messages and images that compel biofuel businesses to migrate towards their clients.

Business development executives understand the dynamics of the market and identify possible partnerships or joint ventures with key biofuel production and distribution companies.

Information and research center librarians provide market researchers, brand and product managers and other colleagues with the vital information they need to do their jobs more effectively.

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RENEWABLE ENERGY GROUP (REG)  
VALERO RENEWABLES

## **APPENDIX A: ACRONYMS USED IN THE REPORT**

## **APPENDIX B: COMPANY CONTACT INFORMATION**

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