World Biodiesel Markets
The Outlook to 2010

A special study from F.O. Licht and Agra CEAS

This important new study provides a detailed analysis of the global biodiesel market and the outlook for growth and development to the end of the decade.

The study examines the critical factors influencing the market, including the regulatory and trade framework, feedstock supply and price developments, biodiesel production processes and costs, and current and projected global biodiesel capacity. It includes profiles of the major national markets.

The study features almost 200 pages of data and analysis with more than 70 tables and charts.

NEW

Outlook for the world biodiesel market to 2010
In-depth profiles on Europe, the Americas and Asia/Pacific
Feedstocks
Biodiesel production processes
Production costs
Biodiesel as an alternative to diesel fuel
Technological improvements
Environmental aspects
Diesel/biodiesel vs. gasoline/fuel ethanol
Trade issues
Prospects for world biodiesel market development
• Food vs. fuel debate
• The impact on feed production
Operational biodiesel production capacities worldwide
Biodiesel production capacity under construction and in planning
Over 70 tables, graphs and charts

www.agra-net.com/biodieselmarkets
The world biodiesel industry is still in its infancy but evolving rapidly. World output in 2007 is likely to reach 8.4 million tonnes, valued at about US$7 billion. By 2010, total biodiesel production could be as high as 20 million tonnes. High fuel prices and generous regulatory support have given the sector healthy margins and relatively short investment payback times. The success enjoyed by the first movers, and bright prospects for future growth, are attracting investors from agribusiness, as well as a diverse range of industries, such as petroleum, biotechnology, chemicals, engineering, and financial services.

**Biodiesel Feedstocks**
The most common feedstocks for biodiesel are:
- Soyoil - used mainly in the US and in South America
- Rapeseed and sunflower oils - used mainly in Europe
- Palm oils - used mainly in Asia

Feedstock costs vary tremendously by region and could change significantly in the future. In most biodiesel operations feedstock accounts for 80% or more of production costs, so feedstock prices have a huge effect on producers’ returns.

This unique market study looks in detail at traditional feedstocks and some of the new feedstocks currently being explored, such as jatropha, and examines relative production processes and costs.

**Major Biodiesel Markets**
The second part of the study focuses on the major biodiesel markets around the world and considers the policy that supports and encourages the production and use of biodiesel and the constraints posed by the domestic feedstock market. It includes in-depth profiles of the following areas:
- **European Union**
  - Germany, France, Italy, Spain, UK, Poland, Austria
- **The Americas**
  - USA, Brazil, Colombia, Argentina, Canada
- **Asia/Pacific**
  - Malaysia, Indonesia, Australia, China, India, Philippines, Thailand, Singapore

**World Trade**
Only a small fraction of world biodiesel production is currently exchanged internationally, but this may change in the future. The EU is by far the world’s largest producer of biodiesel, and has a high demand for additional feedstocks which are met through imports. The study provides an overview of world vegetable oil trading patterns which is currently of major importance to biodiesel producers as an increasing volume of vegetable oil ends up in biodiesel refineries.

**Prospects for World Biodiesel Market Development**
The study considers the role of biodiesel in the value chain of food and feed production and looks at:
- Food versus fuel debate - the use of land and water resources
- The interrelation of oils for biodiesel production and oil meals as animal feed ingredients

The study also considers the relative fuel properties of diesel and biodiesel and compares emissions and the effects on agriculture and the environment.

**Outlook to 2010**
The study considers three key factors which will be major influences in the growth of the biodiesel industry over the coming years and looks at the prospects in the main producing and consuming regions:
- Global diesel demand
- Economic viability of biodiesel production
- Domestic policy and political support

**Biodiesel Production Capacities Worldwide**
Current and planned biodiesel production capacities are listed in the study by country and company, and indicate the feedstock used.
Introduction

The product

- The history of biodiesel
- Feedstocks
  - Soya
  - Rapeseed oil
  - Sunflower oil
  - Palm oil
- Other feedstocks
- Comparison of yields
- Production process
- Biodiesel as an alternative to diesel fuel
  - Performance of biodiesel versus diesel fuel
  - Biodiesel standards
  - The cost of production
- Technological improvements
  - Feedstock production
  - Oil processing
- Environmental aspects of biodiesel production and consumption
  - The benefits: lower air emissions, low toxicity
  - Local emissions of air pollutants
  - GHG emissions
  - Human and eco-toxicity
  - The rate of fossil energy preservation
  - Adverse impact: agriculture
  - Agricultural operations
  - Fertilisation
  - Land conversion and loss of biodiversity
  - Environmental impact of biodiesel
- Diesel/biodiesel versus gasoline/fuel ethanol

Biodiesel markets

- European Union
  - Biodiesel production
  - Feedstock
- Biofuels policy
  - Germany
    - Production
    - Feedstock
    - Biofuels policy
  - France
    - Production
    - Feedstock
    - Biofuels policy
  - Italy
  - Spain
  - Poland
  - Austria
  - UK
- The Americas
  - USA
    - Biodiesel industry and political environment
    - Domestic biodiesel production capacity
    - Soybeans versus maize - the feedstock market
    - The outlook
  - Canada
    - Production
    - Feedstock
    - Biofuels policy
- Biofuels policy
  - Brazil
    - Production
    - Feedstock
    - Biofuels policy
  - Argentina
    - Production
    - Feedstock
    - Biofuels policy
  - Colombia
- Asia/Pacific
  - Malaysia
    - Production
    - Feedstock
    - Biofuels policy
  - India
  - China
  - Thailand
  - Indonesia
  - Philippines
  - Singapore
  - Australia
  - Other Asia/Pacific

World biodiesel trade

- Biodiesel import tariff rates and trade issues
  - EU vegetable oil imports
  - Global vegetable oil trade

Over 70 tables, graphs and charts including

- World vegetable oil production, 2002/03-2005/06, mln tonnes
- Major suppliers of soybeans, 2003-2005, '000 tonnes
- Major suppliers of rapeseed oil, 2004/05-2006/07, '000 tonnes
- Major suppliers of palm oil, 2002/03-2006/07, '000 tonnes
- Oil yields of different feedstocks
- Diesel versus biodiesel: comparison of fuel properties
- Sample of biodiesel production cost estimates for Europe and the US
- Loss and profit scenario for biodiesel production in Europe
- Exhaust emissions of biodiesel compared to fossil diesel
- GHG reduction potential of biodiesel (B-100)
- Fertiliser requirements of biodiesel feedstock crops
- Summary on environmental impact of biodiesel
- EU biodiesel production by country, 2002-2006, '000 tonnes
- Vegetable oil production in the EU-27, 2004/05-2006/07, '000 tonnes
- EU biodiesel and rapeseed demand 2005, 2010 and 2015
- Biofuels use and national indicative targets
- Biodiesel taxation in Germany
- Tax-reduced biofuel production quotas in France, '000 tonnes
- Biofuel shares according to the Spanish Renewable Energy Plan
- Monthly biodiesel sales in the UK, mln litres
- U.S. biodiesel production 2000 to 2016, mln gallons
- Biofuel requirements under the Renewable Fuels Standard
- Canada - biodiesel production capacity
- Future biodiesel production capacity and demand in Brazil, tonnes
- Brazilian biodiesel tax incentives
- Argentinean biodiesel output, 2006-2010, tonnes
- Oliseeds production in South East Asia, '000 tonnes
- Biodiesel production in Malaysia, 2006-2010, tonnes
- Malaysia's palm oil production and exports, mln tonnes
- Australia biofuels excise rates
- Production volume of main oilsides in the world, mln tonnes
- Average monthly prices for major oils, EUR/tonne, J une 1999 - J une 2007
- E U rapeseed and rapeseed oil balance sheet 2003-04/05-06/07
- Biodiesel share of rapeseed oil demand EU-25, 1993-2005, mln tonnes
- EU rapeseed and rapeseed oil balance sheet 2003-04/05-06/07
- Outlook of the world biodiesel market in 2010
  - The European Union
  - United States
  - South America
  - Southeast Asia
F.O. Licht is the leading soft commodity analyst with over 140 years' experience and produces a range of regular market reports which include:

- World Ethanol and Biofuels Report
- European Ethanol Price Report
- World Biodiesel Price Report
- World Grain Markets Report
- International Sugar & Sweetener Report
- World Molasses & Feed Ingredients Report
- World Coffee Report
- World Tea Markets Monthly

**Licht Interactive Data** gives you access to F.O. Licht's unique database of world commodity statistics online. This easy-to-use interactive format allows you to locate, interrogate and retrieve data on import, export, production and consumption.

Each year F.O. Licht organises a series of major international conferences in Europe, Asia, Latin America and USA. They include World Ethanol, the premier event for the ethanol industry, World Biofuels, Biofuels Finance & Investment, World Sugar Asia, Sugar & Ethanol Brazil, Biodiesel Brazil and many more.

**For more information go to www.agra-net.com or e-mail marketing@agra-net.com or phone +44 (0) 20 7017 7500.**

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We work extensively with our sister company, **F.O. Licht**, the leading international commodity analyst and information provider in the biofuels and ethanol sector, to provide independent advice and analysis for the global biofuels and ethanol industry. Our unrivalled understanding of the international biofuels and ethanol industry spans the entire length and breadth of the biofuels and ethanol value chain, from feedstock to fuel. We are uniquely placed to offer a wide range of consulting services, including:

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- Biofuels and agricultural policy analysis and business impact assessments
- Due diligence market, economic and financial reports and support
- Plant feasibility studies and support
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- Global market information and sector reviews
- Agriculture/feedstock analysis

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