World Biofuels

Industry Study with Forecasts for **2014 & 2019**

Study #2668 | September 2010 | $5900 | 468 pages

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Industry Study with Forecasts for ***2014 & 2019***

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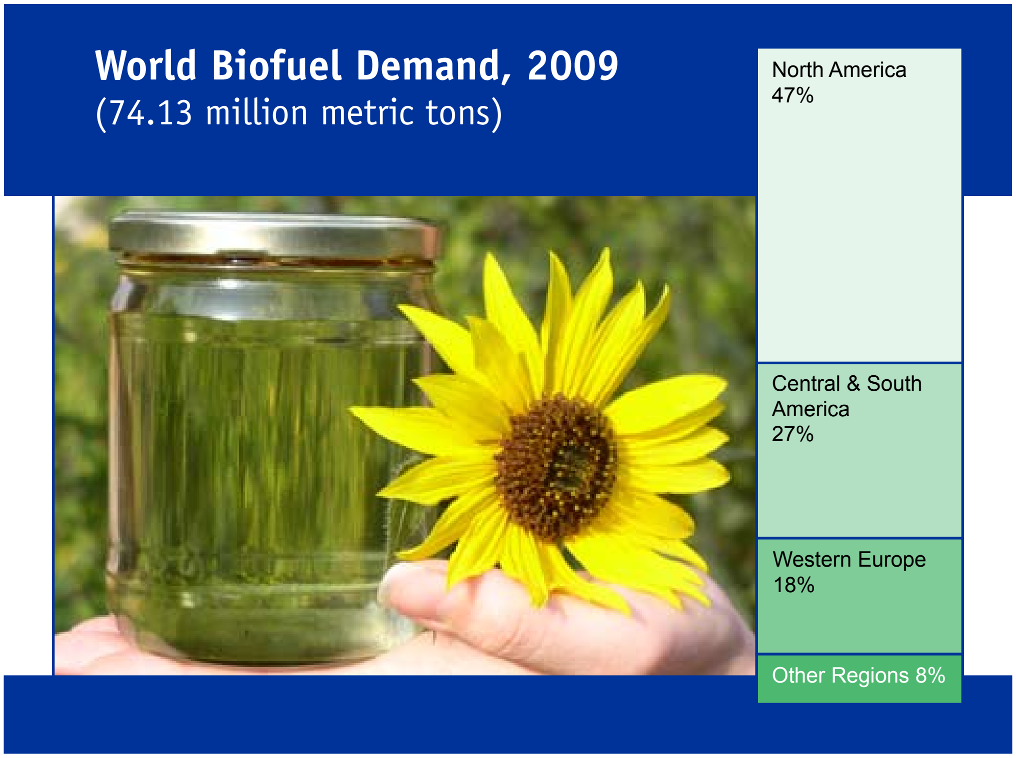
Bioethanol will experience the greatest gains, as continued steady growth in the large North American market will be accompanied by more rapid advances in the Asia/Pacific region and Europe.

Global demand to continue expanding at double-digit annual rates through 2014

Growth in world biofuel demand will continue to expand at a rapid double-digit annual pace, reaching 121 million metric tons in 2014. Bioethanol will experience the greatest gains, as continued steady growth in the large North American market will be accompanied by more rapid advances in the Asia/Pacific region and Europe. Much faster growth will occur in the smaller biodiesel market as the maturation of biodiesel in Western Europe is offset by robust gains in all other regions. Additionally, demand for other biofuels such as biobutanol and renewable diesel will begin to reach commercially significant volumes as production technology matures and full commercial scale plants are brought online. While historically not a factor, global trade in biofuels will rise rapidly going forward as large biofuel consuming countries are forced to seek additional supply, and a number of smaller developing countries seek to exploit biofuel exports as a means of driving economic growth.

United States, Brazil to remain dominant biofuel consumers, producers

The global bioethanol industry will continue to be dominated by the United States and Brazil, the world's two largest consumers and producers of bioethanol.



Delays in the emergence of second generation cellulosic ethanol as a viable alternative to grain-derived bioethanol will create demand for bioethanol derived from sugar cane (made mostly in Brazil) in the United States and Europe. However, over the longer term this imbalance in demand and production will decline as cellulosic ethanol capacity is brought online and other biofuels begin to compete with bioethanol in the marketplace. Other crops such as cassava and sweet sorghum will increasingly be used as bioethanol feedstocks in Africa and Asia, reflecting concerns about the potential use of food crops for biofuels and the general lack of access to technology, infrastructure and funding to pursue more advanced alternatives.

Biodiesel to grow fastest outside of Europe

Western Europe has emerged as the dominant consumer of biodiesel due to the regionwide focus on diesel transport fuel and the need by member nations to comply with the European Union biofuel directive. An increasing EU biofuel obligation will continue to drive biodiesel demand growth in the region, as well as in Eastern Europe, going forward. However, supply constraints will force European consumers to turn to exporters in South America and Asia to satisfy demand. Additionally, rising biodiesel standards in countries outside of Europe will lead to even faster demand growth among all other regions.

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Sample Text, Table & Chart

TABLE VII-9

SOUTH KOREA -- BIOFUEL INDICATORS
(million metric tons)

Item	1999	2004	2009	2014	2019
Gross Domestic Product (bil 2008$)					30
per capita GDP					30
Population (mil persons)					.6
Motor Vehicle Park (mil units)					.8
m ton refined product/vehicle					.4
Refined Petroleum Product Demand					.0
Gasoline Demand					.1
Distillate Fuel Demand					.8
Maize Production					.1
Sugar Cane & Sugar Beet Production					--
Vegetable Oil Production					.2

SAMPLE TABLE

ASIA/PACIFIC

South Korea: Biofuel Supply & Demand

Biofuel demand in South ... m ... 2014 as the government increa... in ... to incrementally meet its annou... nh ... emissions four percent from 20... nc ... will also climb rapidly from ne... q ... ties consumed will remain sma... f ... domestically sourced biofuels, ... at ... throughout the forecast period.

SAMPLE TEXT

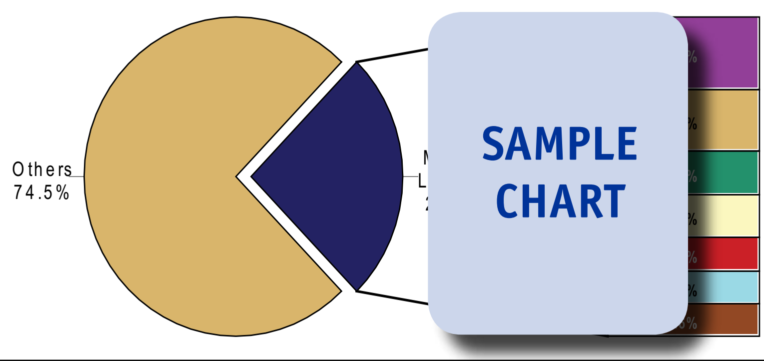
Much like Australia and Japan, South Korea has been slow to develop a national biofuel program. Much of the delay is attributed to the influence of the entrenched domestic energy companies that have sought to avoid competition for their petroleum refined fuels. Initial biofuel blends were introduced in 2006, and are currently set to slowly increase through 2012. However, in late 2009 the government announced a plan to reduce the country's carbon dioxide emissions four percent from 2005 levels by 2020, with the increased consumption of biofuels expected to account for a large share of the reduction. This should result in a ramping up of the biodiesel blend rate well above the three percent levels currently specified for 2012, leading to a jump in demand. Bioethanol demand is expected to remain minimal in the near term as South Korea lacks a cheap domestic source of carbohydrates or sugar, and imports would be prohibitively expensive. Over the long term, biomass-based bioethanol production -- for example, from kelp -- will help boost suppl... levels will remain well below those of biodiesel.

There are a large number of biodiesel makers in South ... were registered with the South Korean Ministry of Knowled... in 2009 -- particularly for such a small market. Plant sizes r... 5,000 to 90,000 metric tons per year, and utilize a combinati... cooking oil and imported soybean and palm oil. Many of the...

265 Copyright 2010

CHART IX-1

WORLD BIOFUEL MARKET SHARE, 2009
(74.13 million metric tons)



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Freedonia

Sample Profile, Table & Forecast

TABLE VII-10

SOUTH KOREA -- BIOFUEL SUPPLY & DEMAND
(million metric tons)

Item	1999	2004	2009	2014	2019
Refined Petroleum Product Demand					
m ton biofuel/000 m ton refined produ					
Biofuel Demand					
Bioethanol					
Biodiesel					
Other					
net exports					
Biofuel Production					
Bioethanol					
Biodiesel					
Other					

SAMPLE TABLE

COMPANY PROFILES

Infinita Renovables SA
Avenida Camelias, 114
36211 Vigo
Spain
34-986-91-3333
http://www.infinitarenovables.es

Sales: $ ... y)
Employ ...)

Key Pro...

Infi ... nufacturer and marketer of ...

SAMPLE PROFILE

The ... uels industry via the production of biodiesel at two plants in Castellon and Ferrol, Spain. The Castellon plant opened in late 2008 with an annual capacity of 680,000 liters on two processing lines. The facility in Ferrol opened in May 2009 with a production capacity of 340,000 liters per year on a single processing line. In 2009, these plants manufactured a total of nearly 340,000 liters, operating at 60-percent capacity. The Company expects to increase production in 2010 to more than 680,000 liters.

Biodiesel is produced by Infinita Renovables using such vegetable oils as soya, rapeseed and palm oil. Much of the Company's raw materials are supplied by the Infinita Renovables Patagonia SA subsidiary (Argentina), which is dedicated to managing agricultural lands for the production of rapeseed, soya and other plants. Infinita Renovables Patagonia performs various agricultural, industrial and commercial processes to obtain and export vegetable oils for use in the Company's biodiesel plants.

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"The Asia/Pacific region accounted for only a small share of world biofuel demand in 2009, as potentially large markets such as Japan, South Korea and Australia trailed other developed countries in North America and Western Europe in terms of their support for biofuels, and as India continued to delay the rollout of its nationwide bioethanol mandate due to a poor sugar cane harvest. Despite the small share of the global market, the region's gains were impressive when compared to 2001 when very little biofuel was consumed."
--Section VII, pg. 240-1

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Other Studies

Lubricants

US demand for lubricants will reverse recent declines, supported by a turnaround in motor vehicle production, an acceleration in the number of automobiles in use, and increased manufacturing output. Higher-quality Group II/II+ and Group III basestocks, as well as synthetic types, will increase their share of the market. This study analyzes the 2.1 billion gallon US lubricant industry, with forecasts for 2014 and 2019 by base oil, product and market. It also evaluates company market share and profiles industry players.

#2677 .... October 2010 .... $4900

Enzymes

US demand for enzymes will rise 4.8% annually to 2014. Gains will be driven by continued expansion of higher-value specialty enzymes in pharmaceuticals, diagnostics, research and biotechnology, and biocatalysts. In the biofuels segment, growth will moderate as the industry transitions to cellulases for producing biomass ethanol. This study analyzes the $2.2 billion US enzymes industry, with forecasts for 2014 and 2019 by market and product. It also evaluates company market share and profiles industry competitors.

#2670 .... September 2010................ $4900

Refinery Chemicals

US refinery chemical demand will rise 5% annually through 2014, driven by the use of new, higher-value products that offer enhanced performance. Merchant hydrogen will remain the largest product type and grow the fastest. Petroleum treatment and conversion will remain the largest and fastest growing applications. This study analyzes the $5.5 billion US refinery chemical industry, with forecasts for 2014 and 2019 by application and product. It also evaluates company market share and profiles industry players.

#2629 .... April 2010 .... $4700

Synthetic Lubricants & Functional Fluids

US demand for synthetic lubricants and functional fluids will expand 3.2% annually through 2013. Engine oils and hydraulic and transmission fluids will grow the fastest as synthetics finally begin to penetrate the medium- and heavy-duty truck market and expand market share in the light vehicle segment. This study analyzes the $4.1 billion US synthetic lubricant and functional fluid industry, with forecasts for 2013 and 2018 by product, material and market. It also evaluates company market share and profiles industry competitors.

#2582 .... March 2010................... $4700

Soy Chemicals

US soy chemical demand will grow 7.8% annually through 2013, driven by the continued penetration of biodiesel, and by the adoption of alternatives to traditional, petrochemical-based materials in manufacturing. Soy oil derivatives such as methyl soyate, polyols, soy-based foamed plastics, waxes and fatty acids hold particularly good prospects. This study analyzes the $1.9 billion US soy chemical industry, with forecasts for 2013 and 2018 by product and market. It also evaluates market share and profiles industry players.

#2538 .... September 2009................ $4700

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