



Market Insights: Biodiesel - 2019

Market Insights: Biodiesel - 2019 is one in a series of reports published as part of Nexant's Markets & Profitability program.

Nexant's upcoming Market Insights report provides a comprehensive review of the biodiesel market and includes:

- Discussion regarding key market drivers and constraints for each region
- Supply, demand trade for nine regions: North America, South America, Western Europe, Central Europe, Eastern Europe, Middle East, Africa, Asia Pacific, and China
- Forecast period: 5 years history and 5 years forecast
- Competitiveness analysis, including competitive landscape and cost competitiveness
- Pricing snapshot with commentary regarding latest trends

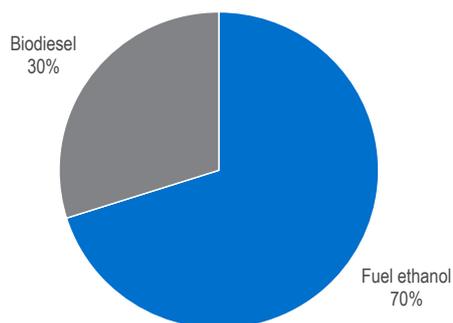
Along with the written report, supply, demand and trade data is provided in Excel.

Published: June 2019

Report Abstract:

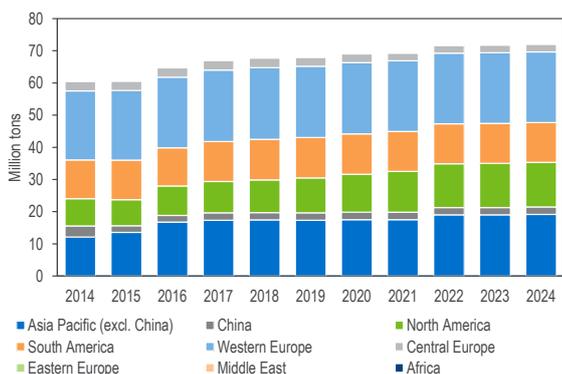
The term biodiesel encompasses a range of products produced from bio-based sources. Biodiesel is currently consumed almost exclusively in road transport applications, where it can be used directly instead of conventional, petroleum-derived, diesel fuel or blended with it. Biodiesel accounts for an estimated 30 percent of road transport biofuel use, behind the more widely used fuel ethanol. Biodiesel is primarily produced in two forms, namely Fatty Acid Methyl Ester (FAME) and Hydrotreated Vegetable Oil (HVO). In addition, biodiesel is defined by the type of feedstock used in its production, either first generation (from food crop-derived feedstocks such as soy, rapeseed or palm oil) or second generation/advanced (from non food crop-derived feedstocks such as used cooking oil). First generation FAME product currently accounts for the majority of the global market.

Road Biofuels Demand, 2018



Biodiesel demand has been supported over the last decade by government policy mechanisms in several fuels markets, initially the European Union, and more recently the United States and several Asian markets. With biofuels targets in the U.S. and European Union approaching key milestones in the early 2020s, demand is projected to rise robustly in the short term. However, the longer term outlook is less positive, as blending targets are reached, and underlying road diesel demand weakens in the European Union.

Biodiesel Capacity Development



A key trend in the global biodiesel market in recent years has been the emergence of HVO, or renewable diesel, which is chemically similar to conventional diesel, and can be used in any concentration without vehicle adaptation. FAME, in contrast, is generally blended into conventional diesel at concentrations of up to around 15 percent. HVO capacity has grown significantly, with much of the world's production being consumed in California, where a state-level incentive program – the Low Carbon Fuel Standard or LCFS – provides incentives based on reduced carbon intensity of fuels. Looking forward, HVO and other routes to renewable diesel are projected to play an increasing role in the global biodiesel market.

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- A. Global Capacity by Region

Each region section in Chapter 3 includes:

- Market Overview
- Market Drivers
- Market Constraints
- Competitive Landscape
- Supply and Demand

For additional analysis on biofuels markets, please refer to:

- **Market Insights: Fuel Ethanol – 2019**
- **Biorenewable Insights: Biofuels for Land & Sea**

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Markets and Profitability tracks over 60 feedstocks, petrochemicals, polymers, chemical intermediates and fertilizers on an ongoing basis and provides regularly updated reports covering all commercial aspects of these global industries. The accompanying database, provides global analysis and forecasts in two major inter- related areas: **Markets and Profitability**.

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