



Market Insights: Fuel Ethanol - 2019

Market Insights: Fuel Ethanol - 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 fuel ethanol 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

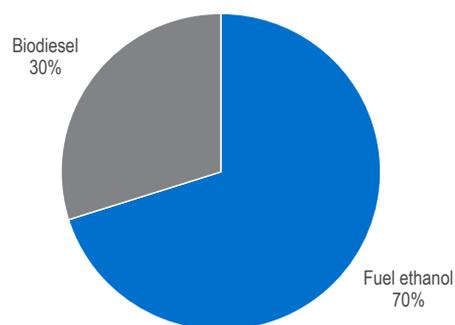
Along with the written report, supply, demand and trade data is provided in Excel.

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Report Abstract:

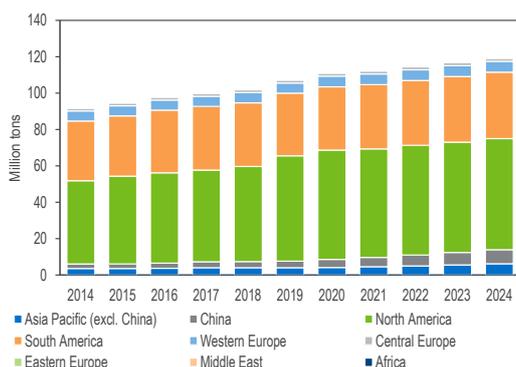
Ethanol – otherwise known as alcohol, ethyl alcohol or EtOH – is a compound produced from bio-based feedstocks, largely via the fermentation of sugar or starch crops or less commonly from petroleum-derived sources such as ethylene. Ethanol has a wide range of uses, from beverages to chemical and industrial applications. However, use in transport applications, as a substitute for petroleum-derived gasoline, has become increasingly important in recent decades, as governments worldwide have ramped up efforts to reduce carbon emissions from the road transport sector. Fuel ethanol is the most widely used biofuel globally, accounting for around 70 percent of global road biofuel use, well in excess of the only other widely used biofuel, biodiesel.

Road Biofuels Demand, 2018



Fuel ethanol demand has been supported over the last decade by key government policy mechanisms in several leading gasoline markets, led by the United States, Brazil and Western Europe. 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 gasoline demand flattens in key markets through 2030. Other large markets, led by China and India, have announced ambitious ethanol targets, but may face significant obstacles in reaching higher ethanol content in their gasoline pools.

Fuel Ethanol Capacity Development



The global ethanol market is led by the United States and Brazil, each leveraging their extensive cultivation of feedstock crops, namely corn and sugarcane (defined as first generation feedstocks), to stand as key global suppliers. However, production is increasing in a range of other markets, notably in Asia. In addition, significant efforts have been made to spur production from non-food feedstocks (second generation, or advanced ethanol). Progress on scaling up advanced ethanol production – particularly cellulosic ethanol – has, however, encountered various obstacles, and has failed to reach levels anticipated relatively recently. Economic commercial scale cellulosic production is a key target for the industry in the coming years.

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Table of Contents

1. Executive Summary
2. Introduction
 - 2.1. Overview
 - 2.2. Key End-Use Markets
3. Market Outlook
 - 3.1. Global
 - 3.2. North America
 - 3.3. South America
 - 3.4. Asia Pacific (excluding China)
 - 3.5. China
 - 3.6. Western Europe
 - 3.7. Central Europe
 - 3.8. Eastern Europe
 - 3.9. Middle East
 - 3.10. Africa
4. Cost Competitiveness
5. Market Summary
 - 5.1. Porters Five Force

Appendix

- 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: Biodiesel – 2019**
- **Biorenewable Insights: Biofuels for Land & Sea**

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Contact Us:

For more information please contact

markets@nexant.com

or

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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**.

Nexant serves its clients from over 30 offices located throughout the Americas, Europe, the Middle East, Africa and Asia.

Corporate Headquarters

Tel: +1 415 369 1000
101 2nd St Suite 1000
San Francisco
CA 94105-3651
USA

Americas

Tel: +1 914 609 0300
44 S Broadway,
4th Floor White Plains
NY 10601-4425
USA

Europe, Middle East & Africa

Tel: +44 20 7950 1600
1 King's Arms Yard
London EC2R 7AF
United Kingdom

Asia Pacific

Tel: +662 793 4600
22nd Floor, Rasa Tower I
555 Phahonyothin Road
Kwaeng Chatuchak
Khet Chatuchak
Bangkok 10900
Thailand