



Market Insights: Fuel Ethanol – 2022

Market Insights: Fuel Ethanol - 2022 is one in a series of reports published as part of NexantECA’s **Markets & Profitability** program.

NexantECA’s Market Insights report provides a comprehensive review of the global fuel ethanol market, including supply by first generation and second generation (advanced) and demand by country.

The following scope is covered:

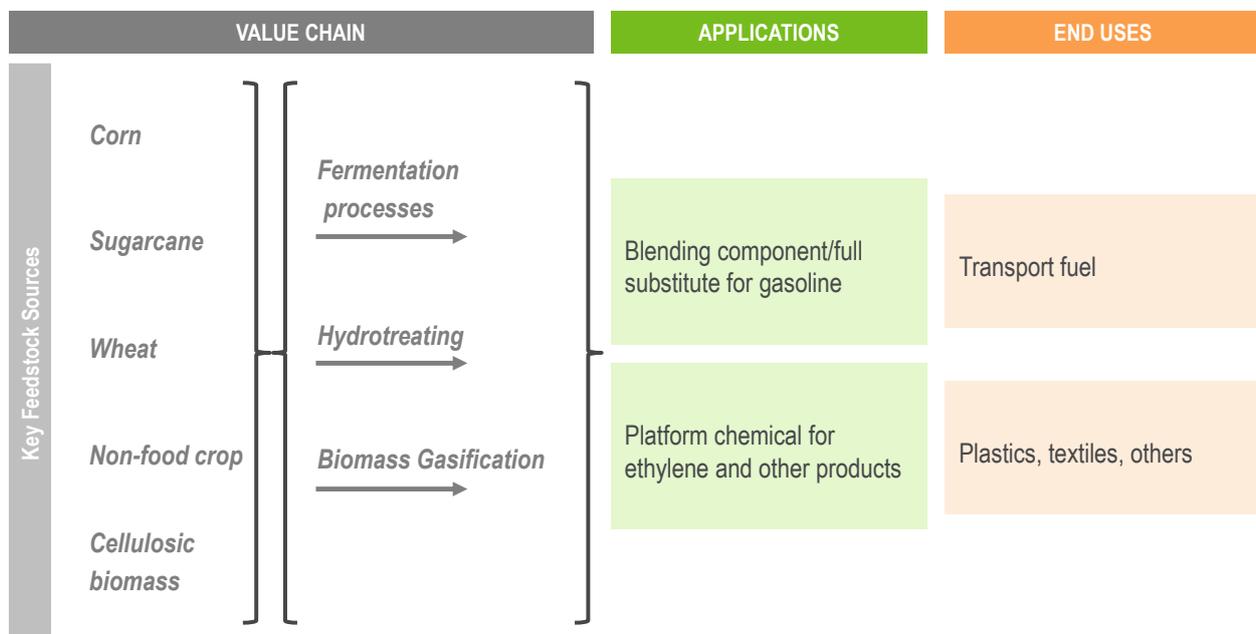
- Discussion regarding key market drivers and constraints for each region
- Supply/Demand/Trade for nine regions: North America, South America, Western Europe, Central Europe, Eastern Europe, Middle East, Africa, Asia Pacific, and China
- Competitiveness analysis, including competitive landscape and cost competitiveness
- Price history and forecast with commentary regarding latest trends
- Forecast period: 10 years history and 15 year forecast to 2035

Along with the written report, data is provided in Excel

Report Abstract:

Ethanol – otherwise known as alcohol, ethyl alcohol or EtOH – is a compound produced either from bio-based or petroleum-derived feedstocks. Production from bio-based feedstocks – largely via the fermentation of sugar or starch crops – accounts for the majority of the global ethanol market. Production from petroleum-derived sources – largely ethylene – is at a much smaller scale.

Ethanol – whether produced from bio-derived or petroleum-derived sources – is essentially highly purified alcohol. Accordingly, the product has a wide variety of uses, notably in the production of alcoholic beverages, but also in the chemical and fuel sectors. While other applications are addressed, this report focuses on ethanol use in the transport fuel sector, where the product has emerged over several decades as the world’s most widely consumed biofuel.



Fuel ethanol is defined by a variety of terms, depending on the type of feedstock, or the type of technological process, used in its production. NexantECA classifies fuel ethanol (as well as biodiesel and other biofuels) either as “first generation” or “second generation” (otherwise known as “advanced”) product, an approach which is broadly in line with that of authorities in the European Union, the United States or China.

Ethanol is produced using a range of technological processes, but the product is generally defined based on the nature of its feedstocks, and specifically whether its production competes directly with food or animal feed crop

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cultivation. Ethanol produced from food and feed crops is defined as first generation product. Such feedstocks include corn, sugarcane, wheat, sugar beet, sorghum and cassava. Ethanol derived from these sources account for the majority of global demand.

Ethanol produced via newer production processes, using feedstocks that do not compete with food or feed production, such as cellulosic ethanol from sources such as agricultural waste, is defined as second generation, or advanced ethanol. Second generation ethanol production has been the focus of sustained efforts in recent years, but remains limited in scale compared to first generation product.

The drive for second generation ethanol is due to considerations around the impact of first generation biofuels on food supply and prices, as well as the extent to which these products can effectively bring about reductions in greenhouse gas (GHG) emissions compared to conventional petroleum-derived transport fuels. First generation and advanced ethanol are subject to different policy incentives and mandates in many key markets, as discussed in further detail in the report.



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Each region section in Chapter 3 includes:

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

Report License Details:

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- Consultation time with the project team

Contact Us

For more information:

Markets@NexantECA.com

or

www.NexantECA.com



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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
110 Cannon Street, London
EC4N 6EU
United Kingdom

Asia Pacific

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