NEW

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.

- 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

Available in print and on CD

F.O. LICHTS and Agra CEAS Consulting

www.agra-net.com/biodieselmarkets

World Biodiesel Markets The Outlook to 2010

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$7billion. 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.

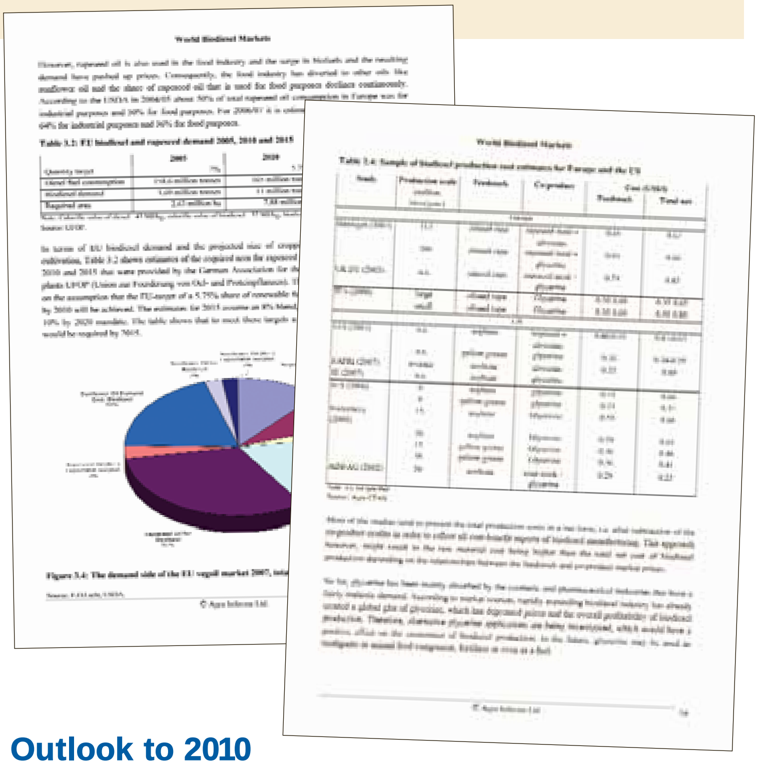
Biodiesel Feedstocks

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

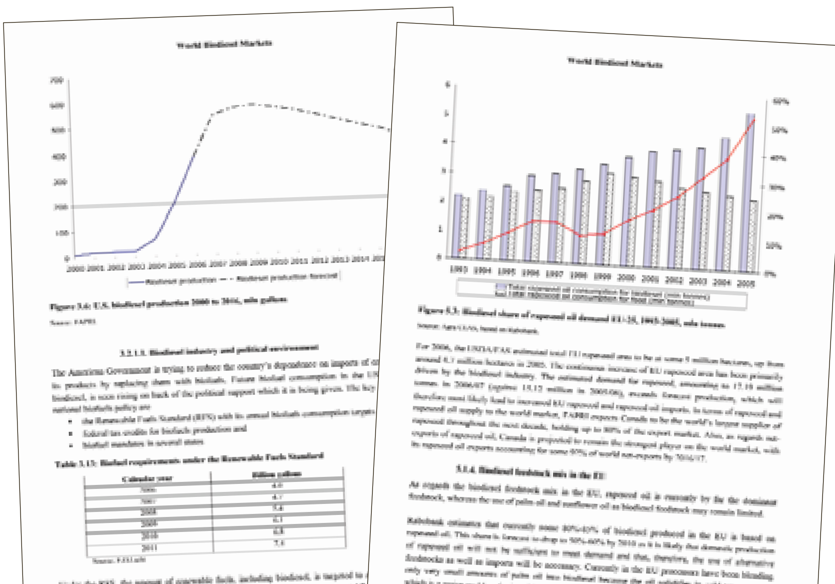
The study considers three key factors which will be major influences in the growth of the biodiesel industry over the coming years and looks at the prospects in the main producing and consuming regions:

- **Global diesel demand**
- **Economic viability of biodiesel production**
- **Domestic policy and political support**

● **European Union** ● **USA** ● **South America** ● **Southeast Asia**

Biodiesel Production Capacities Worldwide

Current and planned biodiesel production capacities are listed in the study by country and company, and indicate the feedstock used.



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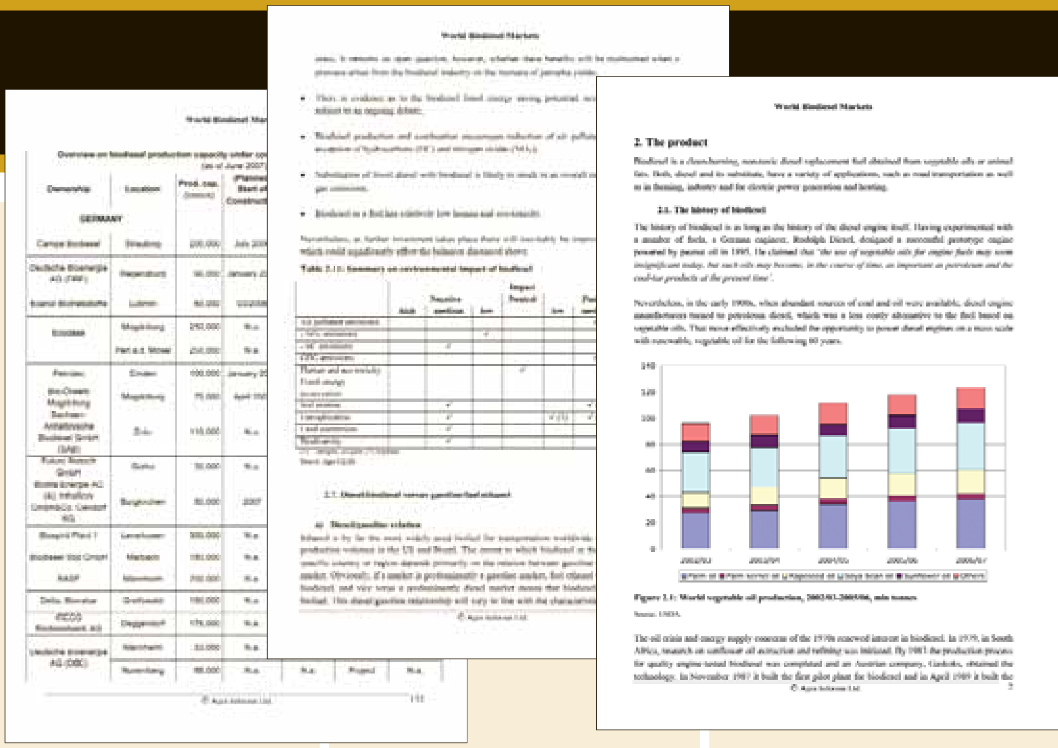

Over 70 tables, graphs and charts including

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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
- International 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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