

Table A.33. Main policy assumptions for biofuel markets

		2015est	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
ARGENTINA												
Biodiesel												
Export tax	%	6.1	3.9	3.9	3.9	3.9	3.9	3.9	3.9	3.9	3.9	3.9
BRAZIL												
Ethanol												
Import tariff	%	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Incorporation mandate ¹	%	19.9	19.9	19.9	19.9	19.9	19.9	19.9	19.9	19.9	19.9	19.9
Biodiesel												
Tax concessions ²	BRL/hl	16.7	11.0	12.8	14.2	15.2	16.4	16.9	17.3	18.3	19.4	20.5
Import tariff	%	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
CANADA												
Ethanol												
Tax concessions ²	CAD/hl	6.4	6.4	6.4	6.4	6.4	6.4	6.4	6.4	6.4	6.4	6.4
Import tariff	CAD/hl	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0
Incorporation mandate ¹	%	3.4	3.4	3.4	3.4	3.4	3.4	3.4	3.4	3.4	3.4	3.4
Direct support												
Federal	CAD/hl	..	..	..	..	..	..	..	..	..	..	..
Provincial	CAD/hl	4.3	4.3	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0
Biodiesel												
Tax concessions ²	CAD/hl	7.7	7.7	7.7	7.7	7.7	7.7	8.7	8.7	8.7	8.7	8.7
Incorporation mandate ¹	%	1.8	1.8	1.8	1.8	1.8	1.8	1.8	1.8	1.8	1.8	1.8
Direct support												
Federal	CAD/hl	8.0	6.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Provincial	CAD/hl	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
COLOMBIA												
Ethanol												
Import tariff	%	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0
Blending target ^{3,4}	%	8.0	9.0	9.0	9.0	9.0	10.0	10.0	10.0	10.0	10.0	10.0
Biodiesel												
Blending target ⁴	%	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0
EUROPEAN UNION												
Biofuel												
Energy share in fuel consumption ⁵	%	5.0	5.4	5.8	6.1	6.4	6.5	6.5	6.5	6.5	6.5	6.5
Ethanol												
Tax concessions ²	EUR/hl	18.3	18.3	18.3	18.3	18.3	18.3	18.3	18.3	18.3	18.3	18.3
Import tariff	EUR/hl	19.2	19.2	19.2	19.2	19.2	19.2	19.2	19.2	19.2	19.2	19.2
Biodiesel												
Tax concessions ²	EUR/hl	19.4	19.4	19.4	19.4	19.4	19.4	19.4	19.4	19.4	19.4	19.4
Import tariff	%	6.5	6.5	6.5	6.5	6.5	6.5	6.5	6.5	6.5	6.5	6.5
INDIA												
Ethanol												
Import tariff	%	8.0	8.0	8.0	8.0	8.0	8.0	8.0	8.0	8.0	8.0	8.0
Share of biofuel mandates in total fuel consumption	%	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0
Biodiesel												
Import tariff	%	7.8	7.8	7.8	7.8	7.8	7.8	7.8	7.8	7.8	7.8	7.8
Share of biofuel mandates in total fuel consumption	%	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0
INDONESIA												
Ethanol												
Import tariff	%	30.0	30.0	30.0	30.0	30.0	30.0	30.0	30.0	30.0	30.0	30.0
Blending target ⁴	%	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Biodiesel												
Blending target ⁴	%	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0
MALAYSIA												
Ethanol												
Import tariff	%	30.3	30.3	30.3	30.3	30.3	30.3	30.3	30.3	30.3	30.3	30.3
Blending target ⁴	%	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Biodiesel												
Blending target ⁴	%	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0
PERU												
Ethanol												
Import tariff	%	6.0	6.0	6.0	6.0	6.0	6.0	6.0	6.0	6.0	6.0	6.0
Blending target ⁴	%	7.8	7.8	7.8	7.8	7.8	7.8	7.8	7.8	7.8	7.8	7.8
Biodiesel												
Import tariff	%	2.3	2.3	2.3	2.3	2.3	2.3	2.3	2.3	2.3	2.3	2.3
Blending target ⁴	%	2.0	2.0	2.2	2.5	2.8	3.1	3.5	3.9	4.4	4.9	5.0

Table A.33. Main policy assumptions for biofuel markets (cont.)

		2015est	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
THAILAND												
Ethanol												
Import tariff	%	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Blending target ⁴	%	9.3	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0
Biodiesel												
Import tariff	%	3.8	3.8	3.8	3.8	3.8	3.8	3.8	3.8	3.8	3.8	3.8
Blending target ⁴	%	7.0	7.0	7.0	7.0	7.0	7.0	7.0	7.0	7.0	7.0	7.0
UNITED STATES												
Renewable Fuel Standard⁶												
Total	mln L	63 708	68 554	68 528	68 029	67 515	67 076	66 962	67 005	67 159	67 394	67 689
advanced mandate	mln L	10 523	13 665	14 400	14 856	15 088	15 303	15 571	15 878	16 216	16 579	16 964
cellulosic ethanol	mln L	466	871	879	888	897	906	915	924	933	943	952
Ethanol												
Import surcharge	USD/hl	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Import tariff (undenatured)	%	2.40	2.40	2.40	2.40	2.40	2.40	2.40	2.40	2.40	2.40	2.40
Import tariff (denatured)	%	1.90	1.90	1.90	1.90	1.90	1.90	1.90	1.90	1.90	1.90	1.90
Blender tax credit	USD/hl	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Biodiesel												
Import tariff	%	4.60	4.60	4.60	4.60	4.60	4.60	4.60	4.60	4.60	4.60	4.60
Blender tax credit	USD/hl	26.42	26.42	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

.. Not available

Note: 2015est: Data for 2015 are estimated.

For many countries, shares for ethanol and biodiesel are not individually specified in the legislation.

Figures are based on a combination of the EU mandate in the context of the Renewable Energy Directive and the National Renewable Energy Action Plans (NREAP) in the EU member states.

1. Share in respective fuel type, energy equivalent.
2. Difference between tax rates applying to fossil and biogen fuels.
3. Applies to cities with more than 500 000 inhabitants.
4. Expressed in volume share.
5. According to the current Renewable energy Directive 2009/28/EC, the energy content of biofuel other than first-generation biofuels counts twice towards meeting the target. It is assumed that other sources than biofuel will help filling the 10% transport energy target.
6. The total, advanced and cellulosic mandates are not at the levels defined in EISA. As those mandates are subject to uncertainties regarding EPA implementation, the following assumptions were taken to construct the baseline: the amount of ethanol being consumed in low blend mixes in the United States will not exceed the "blend wall" level of 10% and the development of the flex-fuel vehicle fleet will be limited.

Source: OECD/FAO (2016), "OECD-FAO Agricultural Outlook", *OECD Agriculture statistics* (database). doi: dx.doi.org/10.1787/agr-outl-data-en