

Table A.33. Main policy assumptions for biofuel markets

		2016est	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
<b>ARGENTINA</b>												
<b>Biodiesel</b>												
Export tax	%	5.1	5.1	5.1	5.1	5.1	5.1	5.1	5.1	5.1	5.1	5.1
<b>BRAZIL</b>												
<b>Ethanol</b>												
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 <sup>2</sup>	%	19.9	19.9	19.9	19.9	19.9	19.9	19.9	19.9	19.9	19.9	19.9
<b>Biodiesel</b>												
Tax concessions <sup>3</sup>	BRL/hl	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Import tariff	%	4.6	4.6	4.6	4.6	4.6	4.6	4.6	4.6	4.6	4.6	4.6
<b>CANADA</b>												
<b>Ethanol</b>												
Tax concessions <sup>3</sup>	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 <sup>2</sup>	%	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	3.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Provincial	CAD/hl	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0
<b>Biodiesel</b>												
Tax concessions <sup>3</sup>	CAD/hl	7.7	7.7	7.7	7.7	7.7	7.7	7.7	7.7	7.7	7.7	7.7
Incorporation mandate <sup>2</sup>	%	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	6.0	0.0	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
<b>COLOMBIA</b>												
<b>Ethanol</b>												
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 <sup>1,4</sup>	%	90.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0
<b>Biodiesel</b>												
Blending target <sup>1</sup>	%	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0	10.0
<b>EUROPEAN UNION</b>												
<b>Biofuel</b>												
Energy share in fuel consumption <sup>5</sup>	%	5.6	5.9	6.1	6.3	6.4	6.4	6.4	6.4	6.4	6.4	6.4
<b>Ethanol</b>												
Tax concessions <sup>3</sup>	EUR/hl	33.9	33.9	33.9	33.9	33.9	33.9	33.9	33.9	33.9	33.9	33.9
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
<b>Biodiesel</b>												
Tax concessions <sup>3</sup>	EUR/hl	11.9	11.9	11.9	11.9	11.9	11.9	11.9	11.9	11.9	11.9	11.9
Import tariff	%	6.5	6.5	6.5	6.5	6.5	6.5	6.5	6.5	6.5	6.5	6.5
<b>INDIA</b>												
<b>Ethanol</b>												
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
<b>Biodiesel</b>												
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	%	5.5	6.4	7.3	8.2	8.2	8.2	8.2	8.2	8.2	8.2	8.2
<b>INDONESIA</b>												
<b>Biodiesel</b>												
Blending target <sup>1</sup>	%	20.0	20.0	20.0	20.0	20.0	20.0	20.0	20.0	20.0	20.0	20.0
<b>MALAYSIA</b>												
<b>Biodiesel</b>												
Blending target <sup>1</sup>	%	6.0	6.0	6.0	6.0	7.0	7.0	7.0	7.0	7.0	7.0	7.0
<b>PERU</b>												
<b>Ethanol</b>												
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 <sup>1</sup>	%	7.8	7.8	7.8	7.8	7.8	7.8	7.8	7.8	7.8	7.8	7.8
<b>Biodiesel</b>												
Blending target <sup>1</sup>	%	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0
<b>THAILAND</b>												
<b>Ethanol</b>												
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 <sup>1</sup>	%	10.4	15.0	15.0	15.0	15.0	15.0	15.0	15.0	15.0	15.0	15.0
<b>Biodiesel</b>												
Blending target <sup>1</sup>	%	7.0	7.0	7.0	7.0	7.0	7.0	7.0	7.0	7.0	7.0	7.0

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

		2016est	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
<b>UNITED STATES</b>												
<b>Renewable Fuel Standard<sup>6</sup></b>												
Total	mIn L	68 554	72 983	73 550	73 550	73 550	73 550	73 550	73 550	73 550	73 550	73 550
advanced mandate	mIn L	13 665	16 202	16 769	16 769	16 769	16 769	16 769	16 769	16 769	16 769	16 769
cellulosic ethanol	mIn L	871	1 177	1 308	1 660	1 986	2 255	2 512	2 800	3 116	3 386	3 663
<b>Ethanol</b>												
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
<b>Biodiesel</b>												
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	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Note: 2016est: Data for 2016 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. Expressed in volume share.
2. Share in respective fuel type, energy equivalent.
3. Difference between tax rates applying to fossil and biogen fuels.
4. Applies to cities with more than 500 000 inhabitants.
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 maximum volume of ethanol being consumed in low blend.

Source: OECD/FAO (2017), "OECD-FAO Agricultural Outlook", *OECD Agriculture statistics* (database). doi: dx.doi.org/10.1787/agr-outl-data-en