

ANNEX A

Table A.28. Main policy assumptions for biofuel markets

		2014est	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
ARGENTINA												
Biodiesel												
Export tax	%	11.8	6.2	6.2	6.2	6.2	6.2	6.2	6.2	6.2	6.2	6.2
BRAZIL												
Ethanol												
Import tariffs	%	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	%	18.3	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	13.5	19.5	18.0	16.3	14.6	14.8	15.1	15.6	16.1	16.5	14.1
Import tariffs	%	4.6	4.6	4.6	4.6	4.6	4.6	4.6	4.6	4.6	4.6	4.6
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 tariffs	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	5.0	4.0	3.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Provincial	CAD/hl	4.3	4.3	4.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Biodiesel												
Tax concessions ²	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 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	10.0	8.0	6.0	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 tariffs	%	9.7	9.7	9.7	9.7	9.7	9.7	9.7	9.7	9.7	9.7	9.7
Blending target ^{3,4}	%	8.0	8.0	9.0	9.0	9.0	9.0	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	%	5.2	5.6	6.0	6.4	6.8	7.0	7.0	7.0	7.0	7.0	7.0
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 tariffs	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 tariffs	%	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 tariffs	%	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 tariffs	%	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	%	3.7	4.6	5.5	6.4	7.3	8.2	8.2	8.2	8.2	8.2	8.2
INDONESIA												
Ethanol												
Import tariffs	%	26.3	26.3	26.3	26.3	26.3	26.3	26.3	26.3	26.3	26.3	26.3
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	%	10.0	11.0	13.0	14.0	15.0	17.0	18.0	19.0	21.0	22.0	24.0
MALAYSIA												
Ethanol												
Import tariffs	%	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	%	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	6.0	6.0	6.0	6.0	7.0	7.0	7.0	7.0	7.0
PERU												
Ethanol												
Import tariffs	%	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	%	7.8	7.8	7.8	7.8	7.8	7.8	7.8	7.8	7.8	7.8	7.8
Biodiesel												
Import tariffs	%	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	%	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0

Table A.28. Main policy assumptions for biofuel markets (cont.)

		2014est	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
THAILAND												
Ethanol												
Import tariffs	%	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	%	8.3	9.3	10.4	11.4	12.4	13.5	14.5	15.6	16.6	17.6	18.7
Biodiesel												
Blending target ⁴	%	5.0	5.0	6.0	6.0	6.0	6.0	7.0	7.0	7.0	7.0	7.0
UNITED STATES												
Renewable Fuel Standard⁶												
Total	mln L	60 793	61 141	61 247	60 794	60 460	60 051	59 841	59 620	59 348	59 086	58 835
advanced mandate	mln L	8 713	8 875	8 894	8 841	8 819	8 772	8 748	8 796	8 792	8 799	8 817
cellulosic ethanol	mln L	0	0	8	14	27	52	99	187	356	677	1 286
biodiesel	mln L	4 845	4 845	4 845	4 845	4 845	4 845	4 845	4 845	4 845	4 845	4 845
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 tariffs (undenatured)	%	2.40	2.40	2.40	2.40	2.40	2.40	2.40	2.40	2.40	2.40	2.40
Import tariffs (denatured)	%	1.90	1.90	1.90	1.90	1.90	1.90	1.90	1.90	1.90	1.90	1.90
Blenders 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 tariffs	%	4.60	4.60	4.60	4.60	4.60	4.60	4.60	4.60	4.60	4.60	4.60
Blenders tax credit	USD/hl	26.42	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Note: 2014est: Data for 2014 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.

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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. This means that the total mandate is assumed to be 60% lower than what is specified in RFS2 for 2024.

Source: OECD/FAO (2015), "OECD-FAO Agricultural Outlook", OECD Agriculture statistics (database). doi: [dx.doi.org/10.1787/agr-outl-data-en](https://doi.org/10.1787/agr-outl-data-en)