Biodiesel 2020:
Global Market Survey, Feedstock Trends and Forecasts
Multi-Client Study, 2nd Edition (2008 release), 685 pages Published by Emerging Markets Online
**Introduction and Executive Summary**

**Rapid Global Market Growth**

The global market for biodiesel is poised for explosive growth in the next ten years. Although Europe currently represents 80% of global biodiesel consumption and production, the U.S. is now ramping up production at a faster rate than Europe, and Brazil is expected to surpass U.S. and European biodiesel production by the year 2015. It is possible that Biodiesel could represent as much as 20% of all on-road diesel used in Brazil, Europe, China and India by the year 2020 with the pursuit of second generation, non-food feedstocks. Biodiesel demand and over-capacity in Europe, the US and Asia is driving investment in the global trade of alternative feedstocks.

**Feedstock Trends and Next Generation Fuels**

For this market study, Emerging Markets Online examines the trend towards lower cost multiple feedstock options, and provides details on new feedstocks and global trade trends. This study provides details of the leading jatropha curcas projects in India, Africa, Asia, and Latin America. This study also reviews major projects in progress for lower-cost feedstocks from renewable diesel, tallow, yellow grease, and waste recycling. Algae based biodiesel projects are also reviewed, along with technologies for renewable diesel via pyrolysis, biomass waste to liquids via GTL, Fischer-Tropsch gas to liquids and others.

**Trends, Outlook, & Opportunities**

In the USA, the market for biodiesel is growing at an alarming rate - from 25 million gallons per year in 2004 to 450+ million gallons in 2007. The total biodiesel being sold in the U.S. amounts to less than 1% of all diesel consumption. In Europe, biodiesel represents 2-3% of total transportation consumption and is targeted to reach 6% by 2010. In China, India, Brazil and Europe, economic and environmental security concerns are giving birth to new government targets and incentives, aimed at reducing petroleum imports and increasing the consumption and production of renewable fuels. Europe, Brazil, China and India each have targets to replace 5% to 20% of total diesel with biodiesel. If governments continue to aggressively pursue targets for second generation fuels; and continue to promote research and development in investment in alternative, non-food feedstocks such as grease tallow, jatropha, castor, algae, and renewable diesel, the prospects for biodiesel will be realized faster than anticipated. **Biodiesel 2020** finds that each of these variables will be essential to the eventual success of these targets.

**Market Forecasts and Scenarios to 2020**

This study tracks the global markets for biodiesel growth, and provides 5 to 10 year forecasts for biodiesel demand, consumption and production. Europe, the U.S., Brazil, China, and India are each covered as market studies. Proprietary forecasts developed for this study are also used to produce 2020 "Scenarios" for Europe, the U.S., Brazil, China, and India. **Biodiesel 2020** also provides an outlook and scenarios for the transition from first generation to second generation biodiesel projects in developed countries and in the emerging markets.
CHAPTER 1: Executive Summary

1.1 Global Biodiesel Trends, Targets, Growth
1.1.1 Executive Summary of Findings
1.1.2 Government Targets for Biodiesel
1.1.3 Market Summary by Region
1.1.4 Summary - Scenarios and Outlook to 2020

1.2 Biodiesel Industry Feedstocks in Transition
1.2.1 Global Supply and Demand Trends in Transition
1.2.1.1 Overcapacity Drives New Trends
1.2.1.2 Demand for Feedstock Exceeds Supplies
1.2.1.3 Feedstock Constraints Drive Import Trade
1.2.1.4 China's Oilseed Consumption and Impact

1.2.2 Biodiesel Industry Structure in Transition
1.2.2.1 Alternative Biodiesel Goes Mainstream
1.2.2.2 Large Renewable Diesel Plants Emerge
1.2.2.3 Yellow Grease Projects Increase
1.2.2.4 Non Food Feedstocks on The Rise

1.2.3 Global Biofuels Policies in Transition
1.2.3.1 National Plans Driving Global Growth
1.2.3.2 Policy Transitions in US, EU, China

1.2.4 Commercialization Outlook 2nd Gen Biodiesel
1.2.4.1 The Biofuels Revolution - Policy Driven
1.2.4.2 The Biofuels Evolution - Market Driven
1.2.4.3 Emerging Markets for 2nd Generation

CHAPTER 2: Europe Biodiesel Market

2.1 Summary: Europe - The World's Leader
2.2 Government Targets, Regulations, Incentives
2.3 Production, Distribution and Retail Markets
2.4 Biodiesel Producer Profiles
2.5 Biodiesel Market Trends
2.6 Feedstock Trends
2.6 Import Trends - US, Ukraine, Russia, Argentina

CHAPTER 3: U.S. Biodiesel Market

3.1 Summary
3.2 Review and Details - Energy Security Act of 2007
3.3 Government Programs, Targets, Incentives
3.4 Production, Distribution and Retail Markets
3.5 Biodiesel Production Trends
3.6 Feedstock Trends and Outlook
3.7 Appendix - End of Tax Credit and Splash & Dash?

CHAPTER 4: Brazil Biodiesel Market

4.1 Summary - Brazil's Big Start for Biodiesel
4.2 Government Programs, Targets, Incentives
4.3 Production, Distribution and Retail Markets
4.4 Biodiesel Production Trends
4.5 Biodiesel Market Trends
4.6 Feedstock Trends and Outlook
4.7 Feedstock Use by Region - Jatropha, Castor, Soy
4.8 Appendix - Biodiesel Export Potential?

CHAPTER 5: China Biodiesel Market

5.1 Summary - China's Entry into Biodiesel
5.2 Government Programs, Targets, Incentives
5.3 Current Production, Distribution and Retail Markets
5.4 Biodiesel Production Trends
5.5 Biodiesel Market Trends
5.6 Feedstock Trends and Outlook
5.7 Appendix - China’s Massive Jatropha Curcas Project

CHAPTER 6: India Biodiesel Markets

6.1 Summary - Nascent Markets in Biodiesel
6.2 Government Programs, Targets, Incentives
6.3 Current Production, Distribution and Retail Markets
6.4 Biodiesel Producer Profiles
6.5 Biodiesel Market Trends
6.6 Feedstock Trends and Outlook
6.7 Appendix

CHAPTER 7: Global Outlook and Forecasts

Review of published petrol and biodiesel forecasts
7.1 Global Biodiesel Forecasts
7.1.1 Petroleum and Diesel Forecasts
7.1.2 Biodiesel Forecasts to 2020
7.2 Europe Petrol, Diesel and Biodiesel Forecasts
7.3 U.S. Petrol, Diesel and Biodiesel Forecasts
7.4 Brazil Petrol, Diesel and Biodiesel Forecasts
7.5 China Petrol, Diesel and Biodiesel Forecasts
7.6 India Petrol, Diesel and Biodiesel Forecasts
CHAPTER 8: Biodiesel Targets to 2020

8.1 Global Biodiesel Targets and Scenarios
8.1.1 Summary of Targets and Forecasts
8.1.2 Comparison of Targets and Forecasts

8.1 Europe
8.2.1 Summary of National Biodiesel Targets
8.2.2 Comparison of Targets and Forecasts

8.3 U.S.
8.3.1 Summary of National Biodiesel Targets
8.3.2 Comparison of Targets and Forecasts

8.4 Brazil
8.4.1 Summary of National Biodiesel Targets
8.4.2 Comparison of Targets and Forecasts

8.5 China
8.5.1 Summary of National Biodiesel Targets
8.5.2 Comparison of Targets and Forecasts

8.6 India
8.6.1 Summary of National Biodiesel Targets
8.6.2 Comparison of Targets and Forecasts

CHAPTER 9: Feedstock Market Trends

9.1 Introduction - Alternative, Lower Cost Feedstocks
9.1.1 Review of Feedstock Price Trends
9.1.2 Price Correlation Between Oilseeds and Petroleum
9.1.3 Production Over-Capacity in Europe, US, Malaysia 1st Generation Feedstock Limits?

9.2 Yellow Grease
9.2.1 US Markets
9.2.2 Global Markets
9.2.3 List of Yellow Grease Based Producers

9.3 Tallow (Chicken Fat, Beef Tallow and Pork Lard)
9.3.1 Tallow Biodiesel Production in US, Global Markets
9.3.2 Tallow Market Segmentation by Size
9.3.3 Large Scale Tallow Biodiesel Production
9.3.4 Medium Size Tallow Biodiesel Production
9.3.5 Local/Community Size Tallow Biodiesel Production
9.3.6 Company Profiles in Tallow Biodiesel
Profiles include project overview, info and illustrations
9.3.6.1 Argent UNK
9.3.6.2 Bertin Group Brazil

9.4 Renewable Diesel from Tallow, Grease, Waste
9.4.1 Renewable and Green Diesel
9.4.2 Introduction to Renewable Diesel
9.4.3 Renewable Diesel Market Characteristics
9.4.3.1 Market Driver - Feedstock Prices
9.4.3.2 Processes for Renewable Diesel
9.4.3.3 Properties of Renewable Diesel
9.4.4 Renewable Diesel Market Segments
9.4.4.1 Large Scale Plants
9.4.4.2 Medium Scale Plants
9.4.4.3 Small - Local/Community Scale Plants
9.4.6 Renewable Diesel Company/Project Profiles
Profiles include project overview, info and illustrations
9.4.6.1 Conoco-Philips Ireland
9.4.6.2 British Petroleum Australia
9.4.6.3 Shell Choren Green Diesel Germany
9.4.6.4 Tyson-ConocoPhilips Texas
9.4.6.5 Sanimax/NovaSource Biofuels
9.4.6 Outlook for Renewable Diesel

9.5 Jatropha Curcas
9.5.1 Introduction to Jatropha Curcas
9.5.2 Jatropha Market Overview
9.5.2.1 Global Jatropha Production
9.5.2.2 Production History
9.5.3 Global Jatropha Markets
9.5.3.1 India
9.5.3.2 Africa
9.5.3.3 Southeast Asia
9.5.3.4 Emerging Markets in Americas, World-Wide
9.5.4 Jatropha Production Levels by Plantation
9.5.4.1 Small Pilot Projects
9.5.4.2 First Stage Commercial Projects
9.5.4.3 Large-Scale Commercial Projects
9.5.6 Jatropha Economics Overview
9.5.7 Jatropha Producing Companies Overview
9.5.8 Jatropha Company Profiles, Projects, Outlook
Profiles include project overview, info and illustrations
9.5.8.1 D1 Oils PLC - UK
9.5.8.2 Mission Biofuels Australia
9.5.8.3 ESV Bio-Africa
9.5.8.4 Duelco Renewable Energy South Africa
Feedstock Trends continued

9.6 Algae to Biodiesel Overview

9.6.1 Introduction to Algae

9.6.2 Algae Overview - Research and Development

9.6.3 Algae Process Methods Overview
  9.6.3.1 Growing Algae
  9.6.3.2 Harvesting Algae
  9.6.3.3 Extraction Methods Overview

9.6.4 Algae Production Methods Overview
  9.6.4.1 Pond Based Systems and Raceway Ponds
  9.6.4.2 Closed PhotoBioreactor Systems

9.6.5 Algae Applications for Biofuels
  9.6.5.1 Algae Waste To Fuels Applications
    9.6.5.1.1 Algae CO2 Capture for Biodiesel, Ethanol, Fuels
    9.6.5.1.2 Municipal Waste Stream Utilization for Algae
  9.6.5.2 Algae Biomass to Liquids Overview
    9.6.5.2.1 Algae to Bio-Oil for Transport, Military Applications
    9.6.5.2.2 Algae to Biodiesel for Transport Fuels
    9.6.5.2.3 Algae to Ethanol for Transport Fuels
    9.6.5.2.4 Algae to Methane for Power Generation

9.6.6 Algae to Biodiesel Obstacles
  9.6.6.1 Common Limiting Factors
  9.6.6.2 Algae Oil Extraction - Economic Viability
  9.6.6.3 Algae Large-Scale Project Commercialization

9.6.7 Algae to Biofuels Projects
  9.6.7.1 Overview and List of Algae Projects A-Z
  9.6.7.2 Project Profiles - Leading Algae to Biodiesel Projects
    Profiles include project overview, info and illustrations
    9.6.7.2.1 GreenFuels Technologies
    9.6.7.2.2 Biofuel - Algae
    9.6.7.2.3 Valcent - Global Green Solutions
    9.6.7.2.4 Cellana - Shell and HR Biopetroleum
    9.6.7.2.5 LiveFuels - Sandia National Labs
    9.6.7.2.6 Chevron-National Renewable Energy Laboratory
    9.6.7.2.7 UOP/Honeywell - DARPA
    9.6.7.2.8 PetroGen Biofuels Refining

9.6.8 Outlook for Algae to Biodiesel Commercial Production
  9.6.8.1 Leaders in the Closed PhotoBioreactor Group
  9.6.8.2 Recent Trends, Leaders in the Open Pond Group
  9.6.8.3 Conclusion - Outlook for Algae Commercialization

CHAPTER 10: Conclusion & Outlook

10.1 First Generation Feedstocks - Limits to Growth?
  10.1.1 Large Scale Commercial Markets in Transition
  10.1.2 EU and US Markets Transition From Subsidies
  10.1.3 BIC Countries - Support for Non-Food Feedstocks

10.2 Game Changers - Large Scale Producers & 2nd Gen
  10.2.1 Game Changing Potential From Large-Scale Plants
  10.2.2 Game Changing Potential From Large Algae Projects

10.3 First Generation Biodiesel Market Trends and Outlook
  10.3.1 1st Generation Markets With/Without Tax Support?
  10.3.2 1st Generation Markets Shift to Large Scale Plants
  10.3.3 1st Generation Markets Shift to Next Generation Plants
  10.3.4 1st Generation Consolidation in Europe, US, Malaysia

10.4 Conclusion and Outlook

  10.4.1 Outlook For Developed Nations - 1st and 2nd Gen
    10.4.1.1 Short Term Outlook to 2010
    10.4.1.2 Mid Term Outlook and Scenarios to 2015
    10.4.1.3 Long Term Outlook and Scenarios to 2020

  10.4.2 Outlook For Emerging Markets - 1st and 2nd Gen
    10.4.2.1 Short Term Outlook to 2010
    10.4.2.2 Mid Term Outlook and Scenarios to 2015
    10.4.2.3 Long Term Outlook and Scenarios to 2020

10.4.3 Economic Sustainability Outlook for Biodiesel

  10.4.3.1 Developed Markets - Economic Sustainability Outlook
    10.4.3.1.1 First Gen Commodity/Food-Grade Feedstocks
    10.4.3.1.2 First Gen Non-Food Feedstocks Accelerate
    10.4.3.1.3 Second Gen Biodiesel Markets Now Expanding

  10.4.3.2 Emerging Markets - Economic Sustainability Outlook
    10.4.3.2.1 First Gen Commodity/Food-Grade Feedstocks
    10.4.3.2.2 First Gen Non-Food Feedstocks Expand Rapidly
    10.4.3.2.3 Second Gen Biodiesel - Leap Frog Opportunity

10.4.4 Opportunities for Sustainable Biofuels

  10.4.4.1 Transition Opportunities to Non-Food, 2nd Gen Biofuels
  10.4.4.2 Economic & Environmental Sustainability Opportunities
  10.4.4.3 Resource Utilization Process Improvement Scenarios
  10.4.4.4 Feedstock Yield Improvement Scenarios
  10.4.4.5 CO2 Powergen/Transport Reduction Via Algae
  10.4.4.6 Collaborative Opportunities for Sustainable Growth
  10.4.4.7 Opportunities for Public-Private Sector Engagement
Table of Figures (continued)

CHAPTER 4 Brazil Biodiesel Markets
Brazil Biodiesel Demand Forecast in MT 2005-2013
Brazil Biodiesel Targets: B2, B5 by 2008 and 2013
Brazil Diesel Sales by Region 1992-2005
Brazil Biodiesel Production Growth January 2006-September 2007
Biodiesel Plant Operations and Capacity in Brazil 2007
Biodiesel Supply, Demand, Surpluses by Region 2008
Biodiesel Supply, Demand Projections 2008 in Million Gallons
Matrix - Biodiesel Capacity in Brazil By Region 2008
Production, Supply, Demand, Exports, Utilization 2003-07
Table of Biodiesel Plants 2008 by Location, Capacity, Company
List of Contact Information For Biodiesel Producers in Brazil
Brazilian Oil and Fats Production by Feedstock Type 2007
Map - Biodiesel Potential by Region and Feedstock Type
Biodiesel Supply & Demand Projections in Brazil by Region 2008
Map - Feedstocks by Region - Soy, Castor, Jatropha, Palm in 2007
Global Soybean Export Forecast by Country 1990 to 2015
Biodiesel Distribution Timeline and Deliveries 2007-2008
List of Brazilian Biodiesel Distributors With Contact Info
List of Brazilian Biodiesel Associations With Contact Info

CHAPTER 4 China Biodiesel Markets
Update - China's 2008 Biofuels Policy Revisions and Initiatives
Matrix of Biofuels Feedstocks and Targets for 2008 and Beyond
Gasoline and Diesel Consumption in China (1980-2004)
Number of Autos Owned in China, Annual Increase (1986-2004)
Projected Vehicle Ownership in China 2002 to 2030
China's Oil Demand Forecast Through 2030
Forecast of China's Oil Import Dependency Through 2030
Table: China's Government Energy Entities
Table: An historical look at China's ethanol production
China Biodiesel Production Capacity and Output
Forecast for China Biodiesel Capacity 2005-2010
Biodiesel Plants In China by Location, Capacity, Feedstock, Process
Table: Biodiesel Feedstock Options In China
Cost Of Biodiesel in China by Feedstock (Jatropha, Pistacia Bunge)
Table: Comparison of fossil and biodiesel prices
Forecast - Automobile Fuel and Automobiles in China
Forecast - Projected Vehicle Ownership in China to 2020
Company Profile - Gushan Company
Company Profile - China Biodiesel

CHAPTER 6: India China Biodiesel Markets
India Oil Consumption 1965-2005
India's Oil Production and Consumption 1980-2005 (Net Imports)
Timeline of India's National Mission With Jatropha Targets
Timeline - Phase 1 - Demonstration Project to Plant Jatropha Curcas
Timeline - Phase 2 - Expansion - Jatropha and Karanja Plantations
Map: States Implementing Ethanol and Jatropha Projects by Region
Table: Jatropha Plantations by NOVOD by Region, Size in Hectares
Table: Biodiesel Tests And Trial Examples In India
Table: Details Of Largescale Jatropha Plantations In India
Table: Company Profiles - Biodiesel Producers and Leaders in India

Table: Companies Setting Up New Biodiesel Units In India
Table: Biodiesel Projects In India
Table: Economics Of Biodiesel Production In India - 3 Models
Appendix: Biodiesel Purchase Policy by Ministry of Petroleum
Appendix: List Of State Level Coordinators For Biodiesel Supply

CHAPTER 7 Forecasts and Scenarios
Growing World Energy Demand 2004-2030
Global Biodiesel Production by Country 2006
World Biodiesel Production 1991-2006
Table: Global Biofuels Targets and Status by Region
Global Biofuels Renewable Energy Targets
Global Oil Production 1950-2050
Oil - Proven Reserves 1965-2005
Global Oil Production by Region 2002-2050
Global Oil Demand by Region 2002-2050
Global Oil Production and Demand by Region 2002-2050
Global Oil Consumption by Country 1965-2005
Global Oil Consumption and Forecasts by Country to 2030
European Biodiesel Production 2002-2006
EU Energy Forecasts by Fuel Type To 2030
EU Energy Demand Outlook To 2030
Forecast - European Automotive Consumption by Fuel Type
European Biodiesel Growth by Country 2002-2006
Forecast - U.S. Demand for Biodiesel 2004-2010
U.S. Department of Energy Biodiesel Forecast to 2020
Diesel Cars Forecast In The US 2005-2010
Weekly U.S. Retail On-Highway Diesel Prices 2004-2006
Forecast - U.S. Distillate Fuel Prices 2002-2008
U.S. Diesel Prices 1995-2006
Forecast - U.S. Oil Production & demand to 2030
Brazil National Biodiesel Targets - 2008 and 2013
Forecast - Brazil Biodiesel Targets 2005-2013
Brazil Oil Production vs. Consumption 1965-2005
Brazil Oil Consumption and Forecasts - 1990 to 2030
China Transportation Biofuels Forecast 2005-2020
China Biodiesel Capacity Forecast 2005-2010
China - Diesel Consumption For Transport Purposes
China Growth Scenario In Demand Of Diesel to 2020
Total Potential For Biodiesel In China 2020
China's Biofuels National Development Plan Targets to 2020
Forecasts Automobile Fuel and Automobiles in China
Forecast - China Oil Production & Demand to 2030
China Oil Consumption and Production to 2050
Comparison of Petroleum Demand Growth - U.S & Asia 1990-2025
China Oil Production vs. Consumption 1996-2006
China Oil Consumption and Forecasts - 1990 to 2030
India - Diesel Demand and Future Biodiesel Requirements
India - Projected Consumption of Light Diesel Oil and Biofuels
India - Forecast Land Requirement by Different % Projections
India - Oil Production and Demand Forecast to 2030
India Oil and Gas Consumption Forecast to 2025
Demand for Biodiesel in India's Transportation Sector 2004-2012
Biodiesel Consumption in India as % of Diesel Consumption

Growing World Energy Demand 2004-2030
Global Biodiesel Production by Country 2006
World Biodiesel Production 1991-2006
Table: Global Biofuels Targets and Status by Region
Global Biofuels Renewable Energy Targets
Global Oil Production 1950-2050
Oil - Proven Reserves 1965-2005
Global Oil Production by Region 2002-2050
Global Oil Demand by Region 2002-2050
Global Oil Production and Demand by Region 2002-2050
Global Oil Consumption by Country 1965-2005
Global Oil Consumption and Forecasts by Country to 2030
European Biodiesel Production 2002-2006
EU Energy Forecasts by Fuel Type To 2030
EU Energy Demand Outlook To 2030
Forecast - European Automotive Consumption by Fuel Type
European Biodiesel Growth by Country 2002-2006
Forecast - U.S. Demand for Biodiesel 2004-2010
U.S. Department of Energy Biodiesel Forecast to 2020
Diesel Cars Forecast In The US 2005-2010
Weekly U.S. Retail On-Highway Diesel Prices 2004-2006
Forecast - U.S. Distillate Fuel Prices 2002-2008
U.S. Diesel Prices 1995-2006
Forecast - U.S. Oil Production & demand to 2030
Brazil National Biodiesel Targets - 2008 and 2013
Forecast - Brazil Biodiesel Targets 2005-2013
Brazil Oil Production vs. Consumption 1965-2005
Brazil Oil Consumption and Forecasts - 1990 to 2030
China Transportation Biofuels Forecast 2005-2020
China Biodiesel Capacity Forecast 2005-2010
China - Diesel Consumption For Transport Purposes
China Growth Scenario In Demand Of Diesel to 2020
Total Potential For Biodiesel In China 2020
China's Biofuels National Development Plan Targets to 2020
Forecasts Automobile Fuel and Automobiles in China
Forecast - China Oil Production & Demand to 2030
China Oil Consumption and Production to 2050
Comparison of Petroleum Demand Growth - U.S & Asia 1990-2025
China Oil Production vs. Consumption 1996-2006
China Oil Consumption and Forecasts - 1990 to 2030
India - Diesel Demand and Future Biodiesel Requirements
India - Projected Consumption of Light Diesel Oil and Biofuels
India - Forecast Land Requirement by Different % Projections
India - Oil Production and Demand Forecast to 2030
India Oil and Gas Consumption Forecast to 2025
Demand for Biodiesel in India's Transportation Sector 2004-2012
Biodiesel Consumption in India as % of Diesel Consumption
### Table of Figures (continued)

#### CHAPTER 9: Biodiesel Plans, Targets, Scenarios
- U.S. 2020: Biodiesel Targets as % of Petrol Demand Forecasts
- Europe 2020: Biodiesel Targets as % of Petrol Demand Forecasts
- China 2020: Biodiesel Targets as % of Petrol Demand Forecasts
- Brazil 2020: Biodiesel Targets as % of Petrol Demand Forecasts
- India 2020: Biodiesel Targets as % of Petrol Demand Forecasts
- Global Biodiesel Target Forecasts by Country 2005 to 2020
- Matrix of Global Biodiesel Targets by Country and Timeline to 2020
- Matrix Key Drivers For Biodiesel Growth

#### CHAPTER 10: Feedstock Markets and Trends
- Forecast - First and Second Generation Biofuels 2005-2030
- Feedstock Price Trends - Europe - Rapeseed Oil FOB 1993-2006
- Price Correlation Between US Soy Oil and Diesel Fuel 2005-2007
- World Biodiesel Production and Capacity 2002-2008
- Europe Biodiesel Production and Capacity 2002-2007
- Feedstock Prices in US - SoyOil, Palm Oil and Yellow Grease
- Price Correlation Between Crude Oil and DJIA 1999-2007

#### Grease and Tallow
- US Yellow Grease and Tallow Production By Volume, Type in 2007
- Prices of US Diesel Fuel, Tallow and Yellow Grease 2005-2007
- Table of US Biodiesel Producers Using Yellow Grease 2007
- List of Small to Mid Sized Biodiesel Producers - Yellow Grease 2007
- Table of Large North American Tallow-Based Operations in 2007
- Comparative Analysis of Tallow Producers By Size, Market
- Company Profile - Tallow Biodiesel - Argent Biodiesel UK
- Company Profile - Brazil's Largest Tallow Based Biodiesel Producer

#### Renewable Diesel
- Matrix of Renewable Diesel By Feedstock, Process Technology
- Feedstock Prices In Europe - Soybean, Rapeseed, Palm Oil in 2007
- List - Examples of Large Renewable Diesel Projects World-Wide
- Diagram - Process Technology - Thermal Depolymerization
- Company Profile - Renewable Diesel - ConocoPhilips Ireland
- Company Profile - Renewable Diesel - British Petroleum Australia
- Project Profile - Green Diesel - Choren Industries/Shell in Germany
- Project Profile - Tyson-ConocoPhilips in Texas, US
- Diagram - Renewable Diesel Process Technology - Tyson-Conoco
- Project Profile - Sanimax/Nova Source Biofuels in Wisconsin, US
- List of US Renderers - Tallow, Animal Fats, Yellow Grease 2007

#### Jatropha Curcas continued
- Table of Large-Scale Jatropha Producers World Wide 2007
- Company Profile - Commercial Jatropha - D1 Oils UK
- Company Profile - Commercial Jatropha - Mission Biofuels
- Company Profile - Commercial Jatropha - ESV Bio-Africa
- Company Profile - Commercial Jatropha - Duelco South Africa
- Table and Details of Large Scale Jatropha Plantations in India
- Table of State Level Coordinators: Supplying Biodiesel in India
- List of Jatropha Seed Suppliers India By Region With Contact Info
- Economics of Jatropha Production in India - Model 1 of 3
- Economics of Jatropha Production in India - Model 2 of 3
- Economics of Jatropha Production in India - Model 3 of 3
- China's Jatropha Program, Incentives, and Initial Plan
- China's 13 Million Hectare Jatropha Plan Details

#### Algae
- Forecast - Ethanol and Green Diesel to 2020 by NREL
- Algae Cultivation - Open Pond Raceway Systems - Photographs
- Illustration of Algae Farm Using Multiple Open Pond Raceways
- Illustration - PhotoBioreactors at Massachusetts Institute of Tech
- Illustration - Diagram of a PhotoBioreactor System from Bioking
- Illustration - Capturing CO2 from PowerGeneration For Algae
- Illustration - PhotoBioreactor System Using Vertical Enclosures
- Process - Algae Conversion to Biomass, Bio Crude, and Biodiesel
- Table of Algae to Biofuels Projects from A to Z, With Descriptions
- Algae Company Profiles, Project Info, Outlook & Illustrations
- Company/Project Profile - GreenFuel Technologies
- Company/Project Profile - Bioking / AlgaeLink
- Company/Project Profile - Valcent/Global Green Solutions
- Company/Project Profile - Cellana - Shelf/HR BioPetrol
- Company/Project Profile - LiveFuels/Sandia National Labs
- Company/Project Profile - Chevron/NREL
- Company/Project Profile - UOP/Honeywell/DARPA
- Company/Project Profile - Petrosun Biofuels Refining

#### CHAPTER 10: Outlook and Conclusions
- Timeline of Commercialization of Biofuels to 2020
- Illustration - Future Large Scale Algae Raceway Pond Farms
- Illustration - Future Large Scale Algae PhotoBioreactor Farms
- Refinery Consolidation, Industry Expansion 1985-2005 (Analog)
- Biodiesel Industry Consolidation in Germany 2007, USA 2008

#### Appendices
- Appendix: Economics And Logistics Of Algae Biodiesel
- Appendix: What is Biodiesel?
- Appendix: Biodiesel Production Fact Sheet
- Appendix: Biodiesel Benefits - By Biofuel Systems
- Appendix: Biodiesel Fact Sheet - Iowa State Government
- Appendix: How Is Biodiesel Used In The Market Place?
- Appendix: NREL - How is Biodiesel Made?
- Appendix: Biodiesel Production Process Explained
- Appendix: Simplified Biodiesel Production Process
TABLE OF FIGURES (selected)

**Chapters 1-6 Selected Figures**
- World Biodiesel Production & Capacity 2002-2008
- Table: Global Matrix of National Biodiesel Targets
- Table: Key Drivens For Biodiesel Market Growth
- Biodiesel Consumption Targets by Country to 2020
- Europe Biodiesel Production and Capacity 2002-2007
- Europe Biodiesel Feedstock Prices 1980-2007
- Europe Rapeseed Oil Imports from Ukraine & Russia 2007
- Biodiesel Production Capacity in Germany 2002-2007
- Biodiesel Production Capacity in France 2002-2008
- Global Gasoline vs Diesel Consumption by Region
- US Energy Independence and Security Act of 2007 Analysis
- US Renewable Fuels Standards Targets 2008-2022
- US Feedstock Prices - Soy Oil, Tallow, Yellow Grease 2007
- US Biodiesel Plants Operating in the US -2006 vs. 2007
- Brazil Biodiesel Demand Forecast in MT 2005-2013
- Biodiesel Plants in Brazil by Location, Capacity in 2007
- Brazil Biodiesel Production by Jatropha, Castor, Soy in 2007
- China Biodiesel Production by Plant, Feedstock Type 2007
- China’s 2008 Biofuels Policy Revisions and Initiatives
- Forecast for China Biodiesel Capacity 2005-2010
- India Biodiesel Program for Jatropha, Production Goals 2007
- Timeline of Commercialization of Biofuels to 2020

**Chapter 9 - Feedstock Trends and Outlook**
- Yellow Grease and Tallow Production By Volume and Type in 2007
- Prices of Diesel Fuel, Tallow and Yellow Grease 2005-2007
- Table of Large US Biodiesel Producers Utilizing Yellow Grease
- Table of Small-Mid Sized Producers Using Yellow Grease 2007
- Table of Large North American Tallow-Based Operations in 2007
- Table of Major Renewable Diesel Projects from Grease, Animal Fats
- List - Examples of Large Renewable Diesel Projects World-Wide
- Map of Commercial Jatropha Plantations in Asia, Africa, Americas
- Map of Jatropha Projects in India By State
- Diagram - Traditional Jatropha Processing Method in India
- Jatropha Production Levels - Pilot/Local Plantations
- Jatropha Production Levels - First Stage Commercial Plantations
- Jatropha Production Levels - Large Commercial Plantations
- Table of Algae to Biofuels Projects from A to Z With Descriptions
- Illustration - Diagram of an Algae PhotoBioreactor System
- Illustration - Diagram Capturing CO2 from PowerGen With Algae
- Illustration - Algae PhotoBioreactor System Using Vertical Enclosures
- Illustration - Large Scale Algae Raceway Pond Farm
- Illustration - Large Scale Algae Closed PhotoBioreactor Farm
- Diagram - Algae Conversion to Biomass, Bio Crude, and Biodiesel
- Appendix: Economics & Logistics Of Algae Biodiesel
- Forecast - First and Second Generation Biodiesel 2008-2030

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