

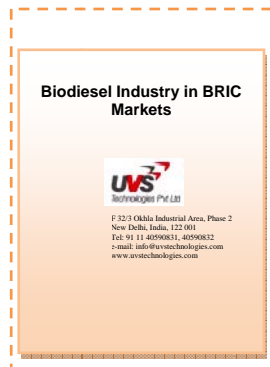
# BIODIESEL INDUSTRY IN BRIC MARKETS

*Size, trends, growth drivers, competitive shares and industry structure underlying the production of Biodiesel used as a fuel substitute in BRIC markets*

Latest information compiled through in-depth research and analysis of the Biodiesel BRIC market comprising existing producers and new entrants in feedstock cultivation and Biodiesel production

## Analysis

- Production estimates in volume and value
- Market share
- End-use applications
- Industry structure
- Competitive review (existing producers and new entrants)
- Capacities
- Domestic consumption Vs exports
- Feedstock usage
- Wasteland development
- Greenfield expansion
- Regulatory environment
- Key trends, drivers and challenges
- Outlook and forecast



## Profiles of Key Players

- Competitive landscape for major producers:
  - ✓ Revenue analysis
  - ✓ Market share
  - ✓ Future strategies & strengths

One-time independently-researched report of its kind which focuses on the Biodiesel production in emerging economics, i.e. Brazil, Russia, India and China. The study includes analysis of production from various feedstock's:

### • Edible oil

- ✓ Soya
- ✓ Palm
- ✓ Sunflower
- ✓ Rapeseed

### • Non-edible oil

- ✓ Rapeseed
- ✓ Jatropha
- ✓ Pongamia

### • Animal fat

- ✓ Tallow
- ✓ Lard

### • Waste vegetable oil/used cooking oil

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# BIODIESEL INDUSTRY IN BRIC MARKETS

## Report Synopsis

This report provides a detailed coverage of the biodiesel market in Brazil, Russia, India and China, generally referred to as BRIC countries. The biodiesel segment in the BRIC markets is amongst the fastest growing sector within the alternative fuel industry.

The research study is a pioneering market research effort by UVS, to analyze the Biodiesel market with emphasis on the overall BRIC market as well as geography specific current size & future projections, current capacity & future additions (including wasteland development and Greenfield facilities setup), end-use applications, feedstock analysis, new entrants in the market, competitive landscape and providing a broad sweep of the regulatory environment governing the sector and the opportunities thereof.

The report further provides a detailed insight into the overarching trends, drivers, challenges/ issues underlining the industry as a whole. The company profiles for the major players further dwells on the sales analysis, competitive position and the specific future strategy of each of these players.

The current size of the Biodiesel market in BRIC is estimated at \$577.57mn (the cumulative turnover of 35 active players), and is further projected to increase to \$6.0bn by 2012, at a CAGR of 59.9%. Further an additional 33 players are in the process of setting up production facilities, which are expected to go live during 2008~12. The top three players alone account for nearly two thirds of the BRIC market, while the rest is distributed amongst the smaller players.

This study can be put to immediate use for current market size identification and assessing future potential, country/region strategizing, competitive landscape analysis, assessing viability of possible strategic tie-ups/alliances either through JVs, equity participation or tech transfer agreements based on the emanating opportunities.

These and other key factors impacting the industry are analyzed in this report - the only study of its kind that seeks to quantify and analyze the entire business of biodiesel manufacturing in the BRIC region. The study goes beyond official statistics/ analyst coverage and provides an independent appraisal generated from a wide-ranging investigation and analysis from the ground-up.

## METHODOLOGY

### PRIMARY

- Interviews and interactive contact with senior industry executives in marketing, sales, strategic planning, and other management functional areas
- Industry trade associations and government agencies
- Trade shows

### SECONDARY

- Trade publications
- Annual and analyst reports
- Analysis of strategies of key players as well as new entrants
- Other literature from individual manufacturers and from general industry sources

## About UVS

UVS is a consultancy, knowledge processing and business publication enterprise, having operational bases in India and Switzerland.

The company specializes in providing Market Research Services and IT Services.

Through its multi-industry and multi-domain research capability UVS helps clients identify and explore growth opportunities in global markets, supporting them in making intelligent and information-driven business decisions.

Key strength at UVS is the highly professional team having vast experience in executing several challenging cross-border assignments across a range of domains/verticals, including:

- Automotive, Auto-component and allied sectors
- Special Purpose Vehicle
- Mineral Extraction & Processing Equipment
- Construction & Construction Equipment
- Retail & FMCG
- Civil Aviation
- Telecommunication
- Packaging
- Media
- Healthcare
- Financial Services
- Strategic Sourcing/ Outsourcing
- IT and ITeS Outsourcing

The functional experts/ project managers at UVS are adept at handling a multitude of client assignment, such as:

- Proprietary Report Writing
- International Sales and Marketing
- Consulting
- Strategic Sourcing Research
- Sector Specific Business Analysis & Forecasts
- Business Research
- Competitive Intelligence
- Expert Sourcing
- Market Share Analysis/ Market Segmentation/
- Competitive Benchmarking/ Company Profiling
- Market Research/ Customer Satisfaction Surveys
- Trend and Churn Analysis

UVS Technology is driven by professional excellence and sustained quality in every sphere of its operations. The company is focused on developing long-term partnerships with global clients - partnerships that bring unparalleled strategic and business advantages to its customers.

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This one-time study on the Biodiesel Industry in BRIC Markets is organized as a COMPLETE REPORT, into the below mentioned sections:

### COMPLETE REPORT

#### A. SCOPE

B. The **EXECUTIVE SUMMARY** highlights briefly the overview of the Biodiesel industry in the BRIC markets. It also references to common trends, drivers and challenges influencing the Biodiesel market in these countries. Additionally, this section also etches the outlook in the region and clearly establishes the core geography w.r.t. future opportunities.

C. **MARKET OVERVIEW** summarizes the entire BRIC market in terms of cumulative production - current and projected (in volume and value), capacity, feedstock usage, end-use applications, industry structure, competitive landscape, new entrants, wasteland development, key trends, drivers, challenges, regulatory environment, Greenfield expansion and overall outlook

D. **MARKET ANALYSIS BY COUNTRY** covers the topics enlisted in Market Overview on a country specific basis, and begins with quantitative estimates of the current and projected production in volume and corresponding value. The data is subsequently segregated along the feedstock usage and end-use application types. Further the market is analyzed w.r.t. domestic consumption and exports. The industry structure establishes the extent of fragmentation in the industry in a particular market. The competitive landscape further entails the extent of dominance by major players. Additionally, the new firms entering the Biodiesel market (as Greenfield projects) substantiate the capacity augmentation programme. Eventually an assessment is made of the key drivers impacting demand and finally, the market analysis is rounded off through a comprehensive evaluation of the profiles of the key players.

E. **NEXT STEPS** is largely based on the outlook and the ensuing opportunities in a market, the appropriate investment destination has been recommended, along with the pre and post entry market support service offerings from UVS.

F. **UVS ADVANTAGE** presents a brief note on the capabilities of UVS in terms of being the virtual partners to all endeavors of its client.

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- FUTURE PLANS

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