THE U.S. GRAINS COUNCIL IS
PROMOTING ETHANOL AROUND THE WORLD

BRAZIL
OUR FOCUS:
Maintaining market access within the framework of the new RenovaBio policy
MARKET SIZE:
390 million gallons of U.S. exports in 2018/19

CANADA
OUR FOCUS:
Supporting provincial and national policies that expand the biofuels mandate beyond E10
MARKET SIZE:
331 million gallons of U.S. exports in 2018/19

INDIA
OUR FOCUS:
Promotion of two-tier ethanol import strategy in order to gain access for U.S. fuel ethanol
MARKET SIZE:
203 million gallons of U.S. exports in 2018/19 (industrial use only)

CHINA
OUR FOCUS:
Informational exchange with policy makers and industry throughout the national transition to E10
MARKET SIZE:
350 million gallons of U.S. exports in 2019/20

JAPAN
OUR FOCUS:
Increase U.S. market share by increasing the carbon baseline score for gasoline
MARKET POTENTIAL:
217 million gallons of ethanol for ETBE production

MEXICO
OUR FOCUS:
Assisting relevant Mexican agencies resolve regulatory barriers to nationwide E10 use
MARKET POTENTIAL:
1.2 billion gallons with implementation of nationwide E10 mandate

INDONESIA
OUR FOCUS:
Providing technical information on blending and infrastructure in addition to octane pricing analysis to government officials and state-owned oil companies
MARKET POTENTIAL:
1 billion gallons with implementation of nationwide E10 mandate

Vietnam
OUR FOCUS:
Working with local leaders to develop biofuels policy

Addressing trade barriers and logistical constraints to imports
Showing ethanol's value as a source of octane

Demonstrating the environmental and human health benefits of ethanol
Working with local leaders to develop biofuels policy
Addressing trade barriers and logistical constraints to imports
Showing ethanol's value as a source of octane

Ethanol’s market potential around the world
- Brazil: 390 million gallons
- Canada: 331 million gallons
- India: 203 million gallons
- China: 350 million gallons
- Japan: 217 million gallons
- Mexico: 1.2 billion gallons
- Indonesia: 1 billion gallons

Key focus areas:
- Promoting ethanol's value as source of octane
- Demonstrating environmental and health benefits
- Assisting policymakers and industry
- Expanding biofuels mandate
- Overcoming logistical barriers and trade issues