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Economic Impact of Biodiesel on the US Economy 2024: Main Report

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Main Report

Introduction

For this study, our goal is to evaluate the economic impact of the biodiesel sector on the United States economy. We assess the effect under a range of scenarios, including the impact if domestic production increased to a maximum of 7.4 billion gallons¹.

This study assesses the impact of the biodiesel industry in three separate ways for a given year:

1. **Economic impact:** this measure quantifies the value added to the United States economy by the biodiesel value chain.
2. **Employment impact:** this measure estimates the number of full-time equivalent (FTE) jobs contributed by production, processing and distribution of biodiesel and its feedstocks.
3. **Wage impact:** this measure evaluates the total wages for individuals employed along the biodiesel value chain.

Throughout this report, we present our results for the first three of these economic indicators as the **total effect**, or sum, of three separate measures: the direct, indirect and induced effects below:

- **Direct effects:** These are the economic, employment and wage impacts that can be directly attributed to the biodiesel value chain. These would include, for example, jobs and wages of people working in biodiesel processing facilities, and the value of oilseed crops grown for use in biodiesel. Although these direct effects are significant, they fail to capture the full impact of the “ripple” effect that the biofuel industry has on supporting industries. We term these the “indirect” effects...
- **Indirect effects:** These are the economic, employment and wage impacts created by those industries that supply the biodiesel value chain, or by individuals who work at the periphery of the sector. For some steps in the biodiesel value chain, the indirect effect can be quite large, such as capital-intensive sectors like oilseed crushing and crude oil refining, where many jobs are associated with keeping facilities operational, from white collar jobs in engineering to the work of trade professionals like electricians, plumbers, and pipefitters working on a contractual basis.
- **Induced Effects:** Direct effects also fail to capture the economic activity stemming from expenditures of households drawing a salary from a given sector. In our case, employees in the biodiesel value chain spend their income in the wider economy, generating value added and jobs. While these induced effects are typically smaller than indirect effects, they can still constitute a sizeable benefit, particularly when the sector being evaluated is large, as is the case for biodiesel.

Note: Throughout the report, we adopt the collective term “biodiesel” when we refer to fatty acid methyl esters (FAME), renewable diesel (RD) and Sustainable Aviation Fuel (SAF). We use the terms “FAME”, “renewable diesel, or RD” and “SAF” when we refer to any of these specifically.

¹ This scenario assumes that capacity continues to expand beyond existing levels and is fully utilized. Current US production capacity is approximately 6.6 billion gallons, increasing to 7.3 billion gallons in 2026 with projects already approved. Capacity could reach more than 8 billion gallons in 2026 based on current, approved and announced projects.

Summary of total impact

Based on actual 2024 production, imports, consumption in and exports from the United States:

- The biodiesel sector contributed a **total U.S. economic impact of \$42.4 billion, 107,400 U.S. jobs, and \$5.8 billion in wages paid.**
- This impact is generated by actual 2024 U.S. biodiesel production of 5.0 billion gallons and imports of 0.9 billion gallons (15% of the total supply), giving total U.S. biodiesel supply of 5.9 billion gallons (of which 0.6 billion gallons were exported and 5.3 billion gallons were consumed domestically). If all 5.9 billion gallons had been produced in United States, the total economic impact would have increased to \$50.2 billion (an increase of \$7.9 billion compared with the 15% import share, supporting 122,600 jobs (an increase of 15,100), and \$6.5 billion in wages paid (an increase of \$0.8 billion).

We include three further scenarios, with **6.4, 6.9 and 7.4 billion gallons of total biodiesel supply**, respectively. These scenarios also estimate the impact if U.S. production/imports are maintained at an 85%/15% split and, alternatively, if production is 100% within United States. The impact of U.S. biodiesel supply of **7.4 billion gallons** is estimated at:

- *If the share of domestic production vs. imports remains at the actual 2024 split of 85% production and 15% imports, this scenario generates \$49.7 billion in total U.S. economic impact, 122,200 U.S. jobs, and \$6.6 billion in U.S. wages paid.*
- *However, if all 7.4 billion gallons were produced domestically (i.e. no biodiesel imports), the effects would increase to \$60.2 billion in total economic impact (an increase of \$10.5 billion compared with the actual 15% import share), supporting 145,700 jobs (an increase of 23,500), and \$7.8 billion in wages paid (an increase of \$1.2 billion).*

Use of multipliers to evaluate indirect and induced impacts

To capture indirect and induced effects, economists use multipliers, which are developed from “input-output” tables and measure the impact on the broader economy from some kind of exogenous shock to a specific sector of the economy. Because input-output tables and economic multipliers are the convention when estimating indirect and induced effects, they are available for many economies globally. In the case of the United States, multipliers are made available by the United States Department of Commerce’s Bureau of Economic Analysis across 406 detailed industries and, in most cases, by state.

Table 1 presents the most important multipliers used in this study, along with the industry classification NAICS code. To capture indirect and induced effects, these multipliers are applied to the calculated direct effects.

Table 1: Effective multipliers (state-weighted averages) used to calculate results for this study

Activities	TOTAL = Direct+Indirect+Induced		
	Economic	Employment	Wage
Crushing	2.76	5.16	3.79
Refining and Biodiesel Processing	2.93	4.94	3.92
Rail	1.85	3.16	2.28
Animal Processing	2.76	4.27	3.62
Oilseed Farm	2.22	3.00	3.09
Trucking	2.15	2.46	2.13

Estimating economic impact with different scenarios for production and imports

The study estimates economic benefits under various scenarios representing different levels of production and imports. For most steps within the value chain, with feedstock production being a good example, the relationship between production and economic impact is linear, i.e. a doubling of oil used in biodiesel results in a doubling of the economic impact. However, for some categories, notably oilseed and biodiesel processing, there are economies of scale at the factory level: we have allowed for these after consultation with industry participants.

Assumptions for renewable diesel (RD) volumes

In our scenarios we assume that domestic FAME output fully utilizes existing capacity, while most of the growth is split between RD and SAF. Regarding the location of this output in the scenarios, we are informed by the Department of Energy's Energy Information Administration (EIA) data on renewable diesel volumes as well as GlobalData capacity databases and discussions with industry personnel.

Pricing and conversion differences

With the rapid developments the US biodiesel sector has witnessed in the last few years, there are now a range of published prices available for RD and SAF. We use West Coast prices published by Argus for assigning a value to the outputs of the biodiesel processing stage.

Nonetheless, the full effect of higher RD and SAF prices does not feed into the processing margin because they require more feedstock per unit of fuel produced. While FAME uses one unit of feedstock for almost one unit of diesel production, renewable diesel requires approximately 1.2 units of feedstock for a given unit of diesel production, while SAF requires 1.4 units of feedstock per unit of renewable kerosene produced. These differences in efficiency, along with the differences in by-product production have been captured in the model.

The biodiesel value chain

We estimate the economic impact of biodiesel on the United States economy by considering the value chain necessary for its production and distribution. We evaluate the benefits for each sector along the value chain, spanning the production, collection and processing of raw materials — oilseeds, animal fats and waste oils — to biodiesel production, distribution, import and export. These steps in the value chain are listed in Table 2, along with a brief description of each.

We have excluded the contribution from the oilseed meal component when evaluating the impact from the production and crushing of oilseeds. We focus only on the **oil share** of value created in oilseeds (and inedible oil for corn) as this is the biodiesel feedstock.

Table 2: The biodiesel value chain

Value chain stage	Description
Oilseed production	Value of the oil produced for biodiesel feedstock in oilseeds. As meal is outside the scope of the biodiesel chain, its value is excluded
Animal processing and waste grease delivery	Processing and rendering of animal carcasses and fats into feedstocks for biodiesel use as well as collection of waste greases
Local oilseed delivery	Delivery of oil share of oilseeds used in biodiesel to local elevation facility
Elevator/grain terminal activities	Elevation and storage of oil component of oilseed used in biodiesel production
Oilseed crush	Value of removing oil from oilseed in the crush process for use as a biodiesel feedstock
Feedstock delivery by barge	Long range delivery of oil share of biodiesel feedstocks by barge
Feedstock delivery by rail	Long range delivery of oil share of biodiesel feedstocks by rail
Port activities for imported feedstock	Unloading ocean-going vessels laden with biodiesel feedstock imports
Biodiesel processing, with feedstock collection	Collection and processing of feedstocks, including waste greases, into biodiesel
Rail deliveries of domestic and exported biodiesel	Rail shipments of domestic biodiesel from surplus to deficit states and ports of export (mostly originating in Midwest and Gulf)
Rail deliveries of glycerin	Rail shipments of domestic glycerin from surplus to deficit states (mostly originating in Midwest)
Rail deliveries of imported biodiesel	Rail shipments of imported biodiesel from surplus to deficit states (mostly originating in Gulf)
Trucking domestic biodiesel to sale	Trucking of domestically produced biodiesel (mostly blended with conventional diesel) from terminal to dealer outlet
Trucking imports to sale	Trucking of imported biodiesel (mostly blended with conventional diesel) from terminal to dealer outlet
Port activities for imported biodiesel	Unloading ocean-going vessels laden with biodiesel imports
Port activities for exported biodiesel	Loading ocean-going vessels with biodiesel shipments for export

Scenarios used in analysis

We calculate the economic, jobs and wages impact associated with biodiesel supply in United States. The effects are presented for each step in the value chain, under various supply scenarios for the United States market:

- 5.9 billion gallons of biodiesel (the actual 2024 figure, which we term the “actual” or “baseline” scenario)
- 6.4 billion gallons
- 6.9 billion gallons
- 7.4 billion gallons

The effect of each of these scenarios is calculated twice:

- For the actual 2024 U.S. production/import split of 85% domestic biodiesel and 15% imported biodiesel. (The actual figure for the model is 84.1% domestic, but we use the term “85%” for ease throughout this report.)
- Assuming that 100% of biodiesel is produced domestically in United States, i.e. no imported biodiesel.

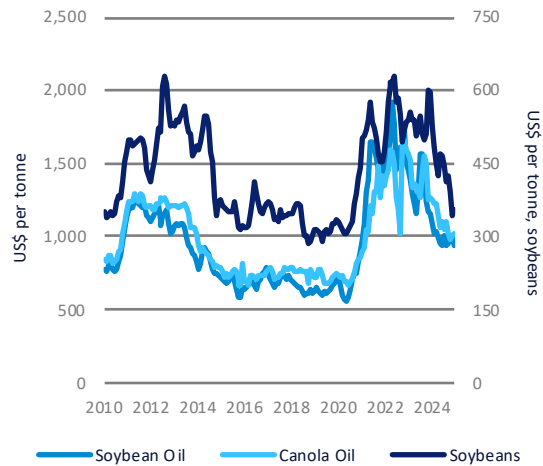
The 2024 market conditions underpinning these projections

The key determinants of the economic value added at several stages of the value chain are prices (and thus margins) multiplied by volumes. In simple terms, therefore, higher prices/margins and higher volumes create economic greater value added. This analysis was undertaken using 2024 data as for prices and as a basis where volumes and capacity distribution are required.

As we see illustrated in Diagram 1 for soybeans, soy oil and canola oil, prices for oilseeds and vegetable oils generally retreated in this period from the 2022 highs, which impacts value added: however, we should remember that the output price of one sector (e.g. farming oilseeds) is the input price for the next sector (e.g. oilseed crushing). Thus, low margins are often offset by low prices from the prior sector in the chain.

When commodity prices ease, we can expect the economic impacts of the biodiesel industry to decline, especially in the farm sector, other things being equal. However, easing prices have been largely counteracted by the surge in volumes over the last couple of years, which has seen RD output outstripping FAME and continuing to accelerate. This volume effect is therefore the main driver for the continued increase in the biodiesel industry’s impacts.

Diagram 1: Soybean and soybean/canola oil prices



Key results

Total benefits

The economic benefits contributed by the biodiesel sector to the United States economy are significant. For 2024, the actual situation, represented by the baseline case, has U.S. production of 5.0 billion gallons and actual imports of 0.9 billion gallons. For this year, we estimate that:

- The biodiesel sector provides **\$42.4 billion in economic activity** to the United States economy.
- The biodiesel sector sustains **107,400 jobs** and supports **\$5.8 billion in wages paid**.

This “actual” case reflects the market in 2024, based on estimates of FAME and RD production from the EIA and imports from the United States International Trade Commission (USITC), with assistance from Clean Fuels Alliance America on RD imports. SAF production and import volumes are based on estimates from GlobalData research.

Most of the value-added activity associated with imported biodiesel takes place overseas and, therefore, on a per-gallon basis, the economic impact of domestic biodiesel production greatly exceeds that of imported biodiesel. Therefore, if U.S. consumption were to remain at the current level of 5.3 billion gallons, the potential benefit from shifting to 100% domestic production *could add as much as*:

- \$7.9 billion in economic activity
- 15,100 further jobs supported
- \$0.8 billion in support to wages paid

The benefits of shifting away from imported biodiesel to 100% domestic production become even greater as the size of the United States biodiesel market increases. For example, with **7.4 billion gallons of U.S. supply**, shifting supply from 85% domestic production to 100% domestic could support an additional:

- \$10.5 billion in economic activity
- 23,500 jobs
- \$1.2 billion in wages paid

These results are presented in Table 3 below.

Table 3: Summary of total impact of biodiesel on the United States economy

	Using actual domestic production (85%) vs imports (15%)				Assuming 100% domestic production			
	Actual	Scenarios			Actual	Scenarios		
Biodiesel								
US production (bn gallons)	5.0	5.3	5.8	6.2	5.9	6.4	6.9	7.4
US imports (bn gallons)	0.9	1.0	1.1	1.2	0.0	0.0	0.0	0.0
Total US supply (bn gallons)	5.9	6.4	6.9	7.4	5.9	6.4	6.9	7.4
Impact								
Economic (US\$ billion)	42.4	42.9	46.3	49.7	50.2	50.6	55.4	60.2
Jobs (FTE)	107,433	110,054	116,046	122,176	122,570	123,839	134,309	145,686
Wage (US\$ billion)	5.8	5.9	6.2	6.6	6.5	6.6	7.2	7.8
Increase (100% US output vs. 15% imports)								
Economic (US\$ billion)	n.a.	n.a.	n.a.	n.a.	7.9	7.7	9.1	10.5
Jobs (FTE)	n.a.	n.a.	n.a.	n.a.	15,137	13,785	18,263	23,511
Wage (US\$ billion)	n.a.	n.a.	n.a.	n.a.	0.8	0.7	1.0	1.2

FTE = full-time equivalent.

Benefits by stage in biodiesel value chain

In the following series of tables, we split the aggregate results presented above into the different stages of the biodiesel value chain. Some of the key results for the sectors that contribute most to the totals are summarized below.

For the actual 2024 situation for U.S. biodiesel supply (5.9 billion gallons, where 85% — 5.0 billion gallons — is supplied domestically), the farm-level **oilseed production sector** benefits from biodiesel supply to the tune of:

- \$15.2 billion in economic impact (36% of the total economic impact of biodiesel)
- 30,600 jobs, 29% of the total
- \$1.5 billion, 26% of the total support to wages paid.

The oilseed production sector (the farm-level of the value chain) is therefore a substantial beneficiary of the value and jobs created by biodiesel activities.

Moving along the value chain to the **processing or crushing of oilseeds**, where we consider only the value added to the oil component in the crush, under the actual 2024 base case of 5.9 billion gallons, the United States biodiesel industry creates:

- \$3.9 billion in economic activity, 9% of the total economic impact of biodiesel
- 8,600 jobs, 8% of the total
- \$410 million, 7% of wages paid.

Further along the biodiesel value chain, we come to the **processing of vegetable oils, animal-based feedstocks and waste greases into biodiesel**.

Under the actual 2024 base case of 5.9 billion gallons, the United States biodiesel industry adds:

- \$19.9 billion in economic activity, 47% of the total economic impact of biodiesel

- 41,500 jobs, 39% of the total
- \$2.4 billion in wages paid, 41% of the total.

Table 4: Economic activity supported by the United States biodiesel sector (using actual 2024 supply composition of 80% U.S. domestic production and 20% imports)

	Actual 2024 Supply	Supply scenarios (85%/15% US/import split)		
US supply (billion gallons)	5.9	6.4	6.9	7.4
- US production	5.0	5.3	5.8	6.2
- Imports	0.9	1.0	1.1	1.2
Economic impact (US\$ billion)	42.37	42.89	46.28	49.73
Oilseed production	15.19	14.50	15.70	17.01
Animal processing and fats/grease delivery *	0.07	0.09	0.10	0.11
Local oilseed delivery	0.29	0.28	0.30	0.32
Elevator/grain terminal activities	0.60	0.58	0.62	0.67
Oilseed crush	3.90	3.83	4.12	4.40
Feedstock delivery by barge	0.09	0.10	0.11	0.12
Feedstock delivery by rail	0.70	0.72	0.79	0.85
Port activities for imported feedstock	0.05	0.05	0.05	0.05
Biodiesel processing	19.89	21.05	22.63	24.20
Rail deliveries of domestic and exported biodiesel	0.92	0.99	1.09	1.18
Rail deliveries of glycerin	0.04	0.04	0.05	0.05
Rail deliveries of imported biodiesel	0.04	0.04	0.04	0.04
Trucking domestic biodiesel to sale	0.45	0.49	0.53	0.57
Trucking imports to sale	0.09	0.09	0.10	0.10
Port activities for imported biodiesel	0.03	0.04	0.04	0.04
Port activities for exported biodiesel	0.02	0.02	0.01	0.01

* As explained in the Methodology, revenues from animal processing are not included.

Table 5: Economic activity supported by the United States biodiesel sector (assuming 100% U.S. domestic production and zero imports)

	Actual 2024 Supply	Supply scenarios (100% domestic production)		
US supply (billion gallons)	5.9	6.4	6.9	7.4
- US production	5.9	6.4	6.9	7.4
- Imports	0.0	0.0	0.0	0.0
Economic impact (US\$ billion)	50.23	50.62	55.42	60.25
Oilseed production	18.19	18.48	19.99	22.33
Animal processing and fats/grease delivery *	0.10	0.10	0.11	0.12
Local oilseed delivery	0.34	0.34	0.37	0.41
Elevator/grain terminal activities	0.71	0.71	0.77	0.85
Oilseed crush	4.48	4.53	4.94	5.41
Feedstock delivery by barge	0.12	0.13	0.15	0.17
Feedstock delivery by rail	0.85	0.86	0.97	1.08
Port activities for imported feedstock	0.05	0.05	0.05	0.06
Biodiesel processing	23.80	23.74	26.24	27.88
Rail deliveries of domestic and exported biodiesel	1.05	1.12	1.23	1.32
Rail deliveries of glycerin	0.05	0.05	0.05	0.05
Rail deliveries of imported biodiesel	0.00	0.00	0.00	0.00
Trucking domestic biodiesel to sale	0.46	0.49	0.53	0.57
Trucking imports to sale	0.00	0.00	0.00	0.00
Port activities for imported biodiesel	0.00	0.00	0.00	0.00
Port activities for exported biodiesel	0.02	0.02	0.01	0.01

* As explained in the Methodology, revenues from animal processing are not included.

Table 6: Jobs supported by the United States biodiesel sector (using actual 2024 supply composition of 80% U.S. domestic production and 20% imports)

	Actual 2024 Supply	Supply scenarios (85%/15% US/import split)		
US supply (billion gallons)	5.9	6.4	6.9	7.4
- US production	5.0	5.3	5.8	6.2
- Imports	0.9	1.0	1.1	1.2
FTE jobs	107,433	110,054	116,046	122,176
Oilseed production	30,642	28,695	30,761	33,005
Animal processing and fats/grease delivery	12,691	15,903	16,912	17,921
Local oilseed delivery	1,026	986	1,064	1,143
Elevator/grain terminal activities	2,153	2,069	2,234	2,400
Oilseed crush	8,596	8,449	9,167	9,885
Feedstock delivery by barge	1,327	1,395	1,553	1,713
Feedstock delivery by rail	1,683	1,714	1,870	2,031
Port activities for imported feedstock	354	394	412	429
Biodiesel processing	41,450	42,204	43,051	43,897
Rail deliveries of domestic and exported biodiesel	3,246	3,735	4,178	4,553
Rail deliveries of glycerin	95	95	101	108
Rail deliveries of imported biodiesel	46	48	52	55
Trucking domestic biodiesel to sale	3,167	3,364	3,643	3,920
Trucking imports to sale	587	615	661	707
Port activities for imported biodiesel	247	263	282	301
Port activities for exported biodiesel	125	125	105	105

Table 7: Jobs supported by the United States biodiesel sector (assuming 100% U.S. domestic production and zero imports)

	Actual 2024 Supply	Supply scenarios (100% domestic production)		
US supply (billion gallons)	5.9	6.4	6.9	7.4
- US production	5.9	6.4	6.9	7.4
- Imports	0.0	0.0	0.0	0.0
FTE jobs	122,570	123,839	134,309	145,686
Oilseed production	36,394	36,025	38,590	42,699
Animal processing and fats/grease delivery	17,289	17,327	19,073	20,231
Local oilseed delivery	1,209	1,221	1,322	1,460
Elevator/grain terminal activities	2,538	2,564	2,778	3,068
Oilseed crush	10,068	10,245	11,271	12,467
Feedstock delivery by barge	1,764	1,796	2,079	2,339
Feedstock delivery by rail	2,003	2,044	2,364	2,708
Port activities for imported feedstock	392	391	416	434
Biodiesel processing	43,329	44,196	47,612	50,825
Rail deliveries of domestic and exported biodiesel	4,028	4,552	5,019	5,418
Rail deliveries of glycerin	119	119	119	119
Rail deliveries of imported biodiesel	0	0	0	0
Trucking domestic biodiesel to sale	3,311	3,234	3,562	3,814
Trucking imports to sale	0	0	0	0
Port activities for imported biodiesel	0	0	0	0
Port activities for exported biodiesel	125	125	105	105

Table 8: Wages supported by the United States biodiesel sector (using actual 2024 supply composition of 80% U.S. domestic production and 20% imports)

	Actual 2024 Supply	Supply scenarios (85%/15% US/import split)		
US supply (billion gallons)	5.9	6.4	6.9	7.4
- US production	5.0	5.3	5.8	6.2
- Imports	0.9	1.0	1.1	1.2
Wage impact (US\$ billion)	5.79	5.92	6.24	6.56
Oilseed production	1.50	1.40	1.50	1.61
Animal processing and fats/grease delivery	0.53	0.66	0.70	0.75
Local oilseed delivery	0.06	0.05	0.06	0.06
Elevator/grain terminal activities	0.14	0.14	0.15	0.16
Oilseed crush	0.41	0.40	0.43	0.47
Feedstock delivery by barge	0.08	0.08	0.09	0.10
Feedstock delivery by rail	0.14	0.14	0.15	0.17
Port activities for imported feedstock	0.03	0.03	0.03	0.03
Biodiesel processing	2.40	2.44	2.49	2.54
Rail deliveries of domestic and exported biodiesel	0.27	0.31	0.34	0.37
Rail deliveries of glycerin	0.01	0.01	0.01	0.01
Rail deliveries of imported biodiesel	0.00	0.00	0.00	0.00
Trucking domestic biodiesel to sale	0.18	0.19	0.21	0.22
Trucking imports to sale	0.03	0.04	0.04	0.04
Port activities for imported biodiesel	0.02	0.02	0.02	0.02
Port activities for exported biodiesel	0.01	0.01	0.01	0.01

Table 9: Wages supported by the United States biodiesel sector (assuming 100% U.S. domestic production and zero imports)

	Actual 2024 Supply	Supply scenarios (100% domestic production)		
US supply (billion gallons)	5.9	6.4	6.9	7.4
- US production	5.9	6.4	6.9	7.4
- Imports	0.0	0.0	0.0	0.0
Wage impact (US\$ billion)	6.55	6.63	7.19	7.80
Oilseed production	1.78	1.76	1.89	2.09
Animal processing and fats/grease delivery	0.72	0.72	0.79	0.84
Local oilseed delivery	0.07	0.07	0.07	0.08
Elevator/grain terminal activities	0.17	0.17	0.18	0.20
Oilseed crush	0.48	0.48	0.53	0.59
Feedstock delivery by barge	0.10	0.10	0.12	0.13
Feedstock delivery by rail	0.16	0.17	0.19	0.22
Port activities for imported feedstock	0.03	0.03	0.03	0.03
Biodiesel processing	2.50	2.55	2.75	2.93
Rail deliveries of domestic and exported biodiesel	0.33	0.37	0.41	0.45
Rail deliveries of glycerin	0.01	0.01	0.01	0.01
Rail deliveries of imported biodiesel	0.00	0.00	0.00	0.00
Trucking domestic biodiesel to sale	0.19	0.18	0.20	0.22
Trucking imports to sale	0.00	0.00	0.00	0.00
Port activities for imported biodiesel	0.00	0.00	0.00	0.00
Port activities for exported biodiesel	0.01	0.01	0.01	0.01

About GlobalData

GlobalData is a leading provider of data, analytics, and insights on the world's largest industries.

In an increasingly fast-moving, complex, and uncertain world, it has never been harder for organizations and decision makers to predict and navigate the future. This is why GlobalData's mission is to help our clients to decode the future and profit from faster, more informed decisions. As a leading information services company, thousands of clients rely on GlobalData for trusted, timely, and actionable intelligence. Our solutions are designed to provide a daily edge to professionals within corporations, financial institutions, professional services, and government agencies.

| Unique Data

We continuously update and enrich 50+ terabytes of unique data to provide an unbiased, authoritative view of the sectors, markets, and companies offering growth opportunities across the world's largest industries.

| Expert Analysis

We leverage the collective expertise of over 2,000 in-house industry analysts, data scientists, and journalists, as well as a global community of industry professionals, to provide decision-makers with timely, actionable insight.

| Innovative Solutions

We help you work smarter and faster by giving you access to powerful analytics and customizable workflow tools tailored to your role, alongside direct access to our expert community of analysts.

| One Platform

We have a single taxonomy across all of our data assets and integrate our capabilities into a single platform – giving you easy access to a complete, dynamic, and comparable view of the world's largest industries.

Contact Us

If you have any more questions regarding our research, please contact us:

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