



An investment in clean fuels is an investment in a stronger, more resilient future for farmers across the U.S. At **Clean Fuels Alliance America**, we're helping to build and sustain strong markets for biomass-based diesel products — and the feedstocks used to produce them — through strategic policy work, fuel quality, research and education efforts. Demand for clean fuels helps safeguard farmers during market fluctuations and international trade challenges.

Biodiesel. Renewable Diesel. Sustainable Aviation Fuel.



Domestic Market Potential (gallons)



ON-& OFF-ROAD
56.4 Billion



BIOHEAT® FUEL
3.3 Billion



RAIL
3.2 Billion



MARINE
2.23 Billion



AVIATION
26.5 Billion

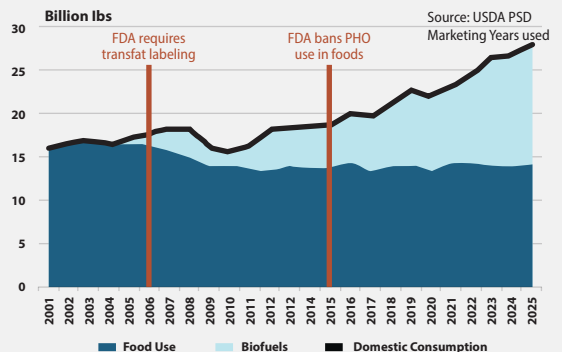
Source: EIA: Annual Energy Outlook

Growing Soybean Demand

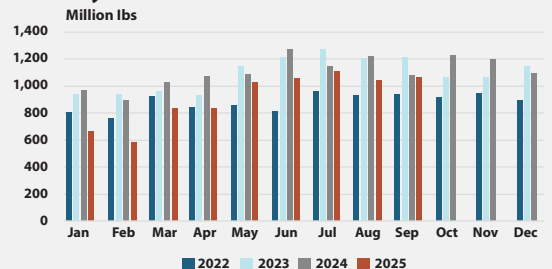
Clean fuels are essential to agricultural markets in the U.S. Since 2009, food demand for soybean oil has remained flat, limiting growth opportunities. Biomass-based diesel (BBD) — most notably, biodiesel and renewable diesel — has become a vital new market beyond food uses. In fact, the use of soybean oil in biodiesel and renewable diesel now represents 10% of the value of every bushel of all U.S. grown soybeans.

The Environmental Protection Agency (EPA) estimates that biodiesel producers would need to increase production volume by millions of gallons per year to meet the U.S. Renewable Fuel Standard (RFS) proposed for 2026 and 2027. This market development would create additional demand for soybeans grown in the U.S.

Domestic SBO Consumption Breakdown



Soybean Oil Use for BBD



Key Policy Initiatives



Federal Policy

Clean Fuels helped secure the adoption of the first robust RFS. For 2026, the EPA has proposed a renewable volume obligation (RVO) for BBD that exceeds what the biomass-based diesel fuel industry requested.



State-level Policy

Clean Fuels has worked on tax incentives, mandates and low-carbon fuel standards at the state level to stabilize demand and continue to grow markets for biodiesel, renewable diesel and sustainable aviation fuel. California remains the single most important market for BBD, with approximately 2.7 billion gallons delivered in 2024, about 74% of the state's diesel pool.

Technical Program

Backed by an expert technical team, Clean Fuels drives demand for BBD fuels by demonstrating compatibility with new and existing markets through established quality standards.



BQ-9000® Quality Assurance

Accredited Fuel Producers *Exceed*
ASTM Requirements

Source: National Laboratory of the Rockies
(Formerly, National Renewable Energy Laboratory)

Clean Fuels Calculator (CFC)

A member benefit for voluntary reporting, the CFC lets biodiesel, renewable diesel and sustainable aviation fuel producers create facility- and batch-specific life cycle analyses (LCAs) and convert them into customer-facing emission factors aligned with the Greenhouse Gas Protocol (GHGP). Unlike compliance tools, it focuses on voluntary market use and simplifies emissions reporting for fuel customers.

Growing Acceptance of Higher Volumes of Biodiesel

John Deere	B30 / B100
Caterpillar	B20 / B100
Wabtec	B20
Progress Rail	B20
Carlin Combustion/Energy Kinetics/RW Beckett/ Webster/Combustion Heating Oil Burners	B100

Carbon Intensity (CI) Score Report

Clean Fuels Alliance America's commitment to science and market research resulted in a **60% reduction** in the modeled indirect land use change (ILUC) value for soy-based clean fuels.



Study: Land Use Change Emissions Associated with Soybeans, Considerations for California's LCFS

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