

Advanced Renewable Transportation Fuels

ART PRODUCTION BY SECTOR

A total of 973 plants in 49 countries are listed on the 2023 edition of the ARTF, up 142 facilities (and four countries). Note that the total in the sector breakdown is 1,055 plants. This is due to the fact that plants with more than one fuel type produced e.g. "HVO/SAF" are counted both in the "Road/rail" and "SAF" categories.

Most of SAU facilities do produce or can produce other transportation fuels, depending on the process pathway – conversely, by adding an extra stop (and gaining the necessary approvals) an HVO plant could produce SAF via the hydro-processing Ester and Fatty Acids (HEFA) Synthetic Kerosene Pathway (SPK), or an ethanol plant could use an ethanol-to-jet (E20). It is also the reason why "Biodiesel" is a separate category, and plants that have polyols (PLG), biocrude, syncrude, are only counted in this category.

Of the 973 plants listed, 123 facilities (12 percent) produce/plan to produce sustainable aviation fuel (SAF), while an additional 45 facilities (4 percent) produce/plan to produce a biocrude for further refining. When it comes to renewable fuels for the road/rail and marine sectors, the numbers are far less certain and the selection into one or another category is even more arbitrary. Unlike SAF which is a dedicated fuel type, there is certain interchangeability between road and marine transportation fuels, for example LBG/LNG and biodiesel both of which are only counted in the "Road/rail" category.

The vast majority, 75 percent or 792 of the plants listed plants produce/plan to produce renewable fuels for the road/rail transportation markets, of which biomethane aka renewable natural gas (RNG) including compressors and liquefied forms (CNG and LNG respectively) is the largest fuel in terms of production facilities, especially in the United States. The remaining 9 percent or 95 facilities would seem to be targeting the inland waterway/maritime sector. Methanol is one fuel that is counted in the marine sector even though methanol/btugel-ether (MTBE) is used as gasoline (as an octane booster), and high blend methanol (M100) is used for road transportation, especially in China, America, India, Russia (RFO) and lignin-ethanol (LIO) are all dedicated marine fuels.

Nonetheless, the ARTF map illustrates that advanced renewable transportation fuel production and activity is ongoing around the world. They range from stand-alone greenfield or brownfield projects to refinery retrofits or "bolt-on" to existing biofuel facilities utilizing a diversity of feedstocks and technologies.

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