

The Contribution of Advanced Renewable Transport Fuels to **Transport Decarbonisation** in 2030 and beyond

Tracking Progress on Biofuels Implementation

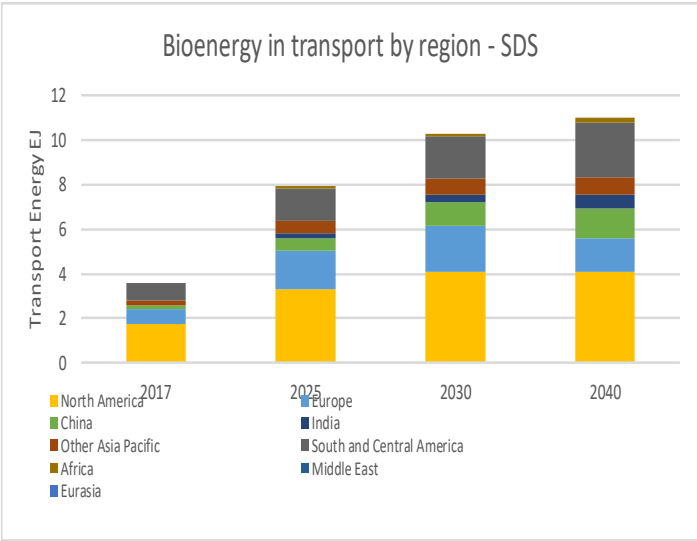
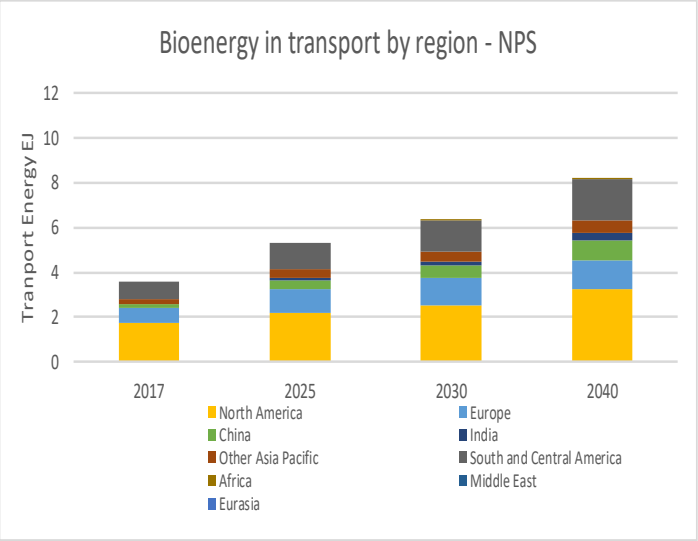
Adam Brown

Brussels, 18 November 2019

IEA WEO Scenarios

Scenario	Assumptions
Current Policy	Existing laws and regulations as of mid-2018
New Policy	Today's policy frameworks and ambitions, including the commitments made in the Nationally Determined Contributions under the Paris Agreement
Sustainable Development	Key outcomes related to the main energy-related components of the Sustainable Development Goals can be achieved.

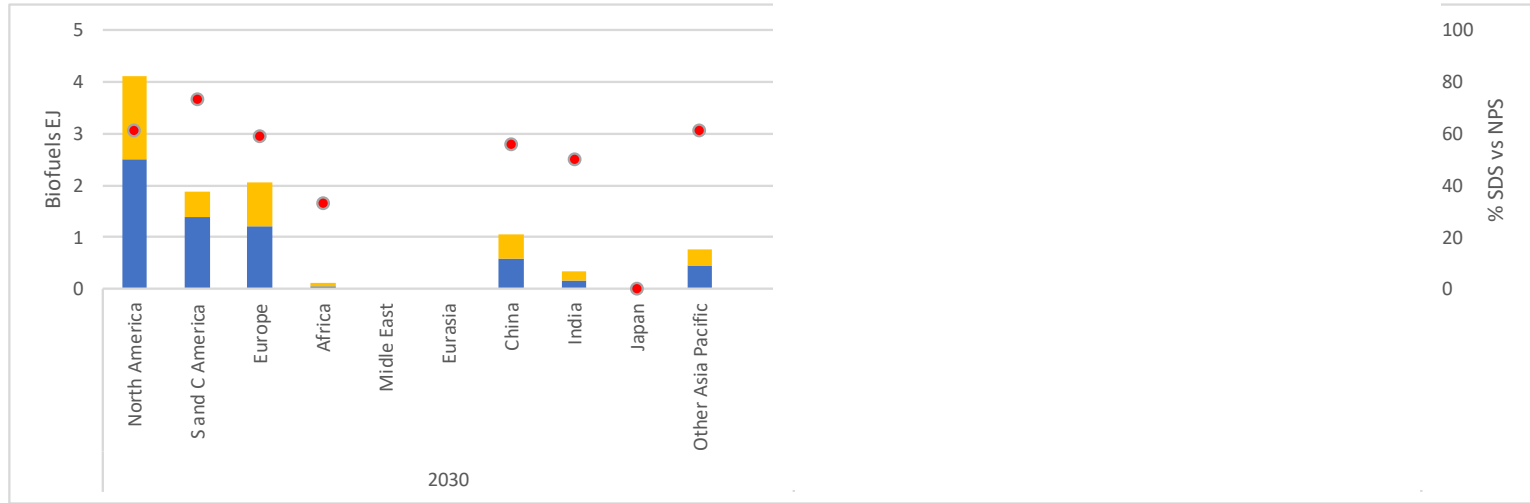
Comparison of role of biofuels in NPS and SDS Scenarios



Source: Based on scenarios in IEA WEO 2018

Comparison of biofuels use in NPS and SDS

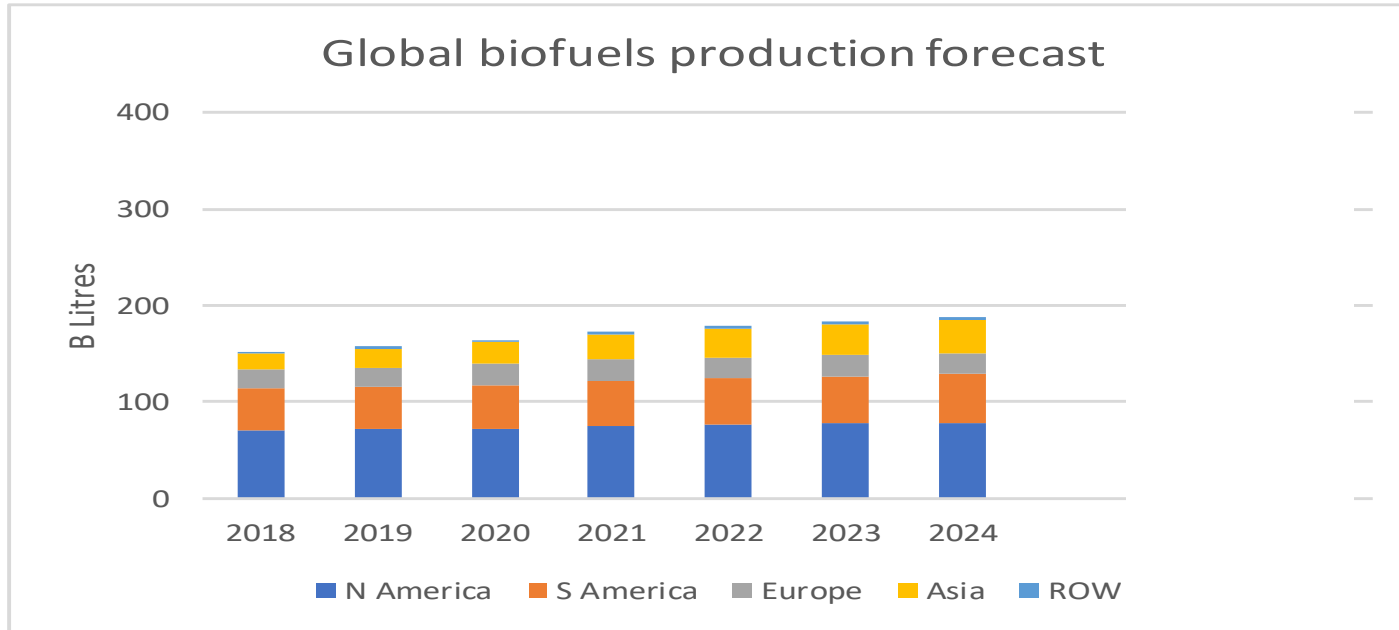
Bioenergy use by region



Source: Based on scenarios in IEA WEO 2018

Current and planned policies will only lead to c 60% of deployment needed in SDS

Biofuels: projected growth by 23% by 2024

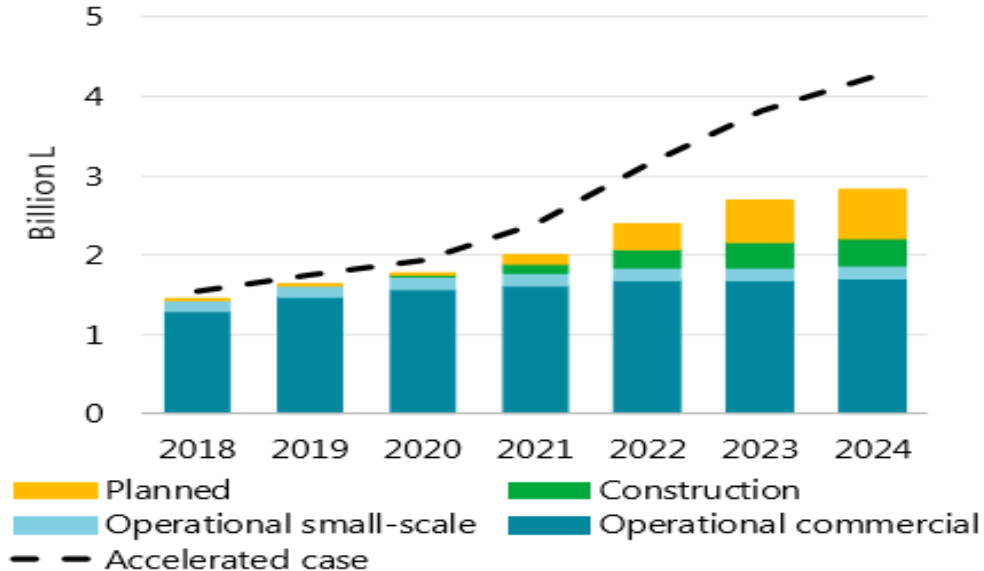


Source: IEA Renewables 2019

Growth: NPS: 50%; SDS 240%

Right sort of biofuels growth?

Forecast – novel advanced biofuels



Source: IEA Renewables 2019

Novel advanced biofuels only around 2% of total biofuels by 2024

Promising signs

1. Strong growth of HVO/HEFA and biomethane

- HVO production due to double by 2024
- Biomethane growing in US and Europe (plus China, India etc.)

2. Market growth in China, India and Brazil

- Biofuels market tripling in China
- Market doubling in India by 2024 plus emphasis on cellulosic ethanol and biomethane
- Brazil growth prompted by RenovaBio

Conclusions

1. **Current and planned policies will provide c. 60% of deployment needed in SDS**
2. **Anticipated levels of deployment in short term will provide only c. 50% of NPS growth by 2024**
3. **Advanced biofuels growing only slowly as % of total**
4. **Promising signs for technically robust options and in China, India, Brazil**
5. **More ambitious policy actions needed to get back on track!**

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More information: <https://iea-amf.org/content/news/TD-WS>

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