

Managing A Changing Biofuels Landscape: Addressing the Need to Innovate, Diversify and Trade in New Global Markets

Tuesday 05 November

World Ethanol & Biofuels Leaders Summit

- 08.00 Registration and Welcome Coffee
- 09.00 **Opening Address**
- 09.20 **Opening Remarks from the Chair**
Christoph Berg, Managing Director
F.O. Licht, Germany
- 09.50 **FACETIME: Hear From Global Leaders and Innovators Pushing The Industry Forward**
- 11.10 Refreshments
- 11.30 **EU POLITICS and POLICY CORNER: Bringing Together Policy-Makers, MEPS and National Government Representatives**
- Instituting a solid and long term regulatory framework
 - ILUC YES; ILUC NO - What to do with ILUC?
 - To cap, or not to cap
 - Establishing incentives for 2G ethanol
 - Signalling commitment to biofuels as a renewable energy
 - Is E10 in the EU still a possibility given the reluctance for implementation?
 - Ensuring 'sustainable' production of biofuels
- 12.20 **HEAD TO HEAD: What are the Real Benefits of Biofuels?**
- 13.00 Conference Lunch
- 14.00 **Keeping the US Fuel Market Open to Alternative Fuels**
- The RFS: What's Next?
 - Moving beyond the 10% blend wall
 - Biodiesel's expanding role is meeting the advanced target in the US
 - Examining blending economics: Given the slow E15 roll out, should the focus shift to E85?
 - How much import demand from the US under the advanced biofuels mandate will there really be?
- 14.30 **Brazil: Meeting Both Domestic and International Rising Demand for Cane Ethanol**
- Hydrous ethanol : Creating a level playing field with gasoline
 - Attracting investment to expand production capacity and cane supply to meet potential rises in domestic and overseas demand

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- 15.00 Refreshments
- 15.30 **BIOFUELS & ETHANOL BUYERS PANEL: Examining the Market Pull From the Oil, Automotive, Chemical and Aviation Industries**
- 16.30 **PANEL DISCUSSION: Economic Analysis of the Biofuels Industry**
- In a changing environment with crude market prices dropping, new oil finding, the shale gas revolution and lower gasoline consumption where does biofuels fit into the fuel energy matrix?
 - Moving away from a negative perception in the political and public arena for first generation biofuels
 - Pushing the underlying positive benefits the biofuels industry has as a successful and viable renewable energy
 - Managing through policy uncertainty: What are the likely policy outcomes in the US and the EU?
 - Dealing with the challenges - ILUC, RFS revision, food/fuel debate, 5% Cap Consequences
- 17.20 **THE GLOBAL EXCHANGE**
World Fuel Ethanol Market Analysis – Demand and Supply Projections and Global Trade Flow Dynamics in the USA, Brazil EU and Asia
- Examining trade flow projections between the US and Brazil – fob and cif prices and RIN value impacts on trade dynamics
 - Overcapacity in the EU or does the EU need to import and where would the ethanol come from?
 - What is the unpinning factor keeping ethanol prices low in the EU?
 - How much ethanol do Asian countries need?
- 18.15 **Bavarian Beer Festival Party at the Augustiner Keller**



4-7 November 2013
Hilton Munich Park Hotel, Germany
16th Annual

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Wednesday 06 November AM

Track 1 – Reinventing First Generations Ethanol Plants *Responding to Market Conditions and Improving Your Margins*

- 08.00 Welcome Coffee
- 09.10 **Introductory Remarks from the Chair**
- 09.20 **Feedstock Switching: Looking at the Economics and Practical Viability of a Multiple Feedstock System**
- 09.50 **Boosting Ethanol Yields Through Advanced Extraction and Yield Technologies**
- 10.20 Refreshments
- 10.50 **Using Advanced Enzymes in Ethanol Production**
- 11.20 **Reducing Plant Energy Costs and Enzymes Costs: Moving to Enzymes in Crops**
- 13.10 Conference Lunch

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Track 2 – 2G Deployment, Biochemicals and Biomaterials

Managing the interdependency between regulation, technology readiness and cost, and financing of a plant

- 08.00 **Welcome Coffee**
- 09.10 **Introductory Remarks from the Chair**
- 09.20 **PANEL DISCUSSION: Second-Generation Value Analysis: Making a Convincing Case and Securing Investment**
- Growth of cellulosic ethanol: What is now needed?
 - Assessing the commercial viability of the technology
 - Political support and incentives to encourage cellulosic ethanol production
 - Scaling production for larger volumes
 - Getting the unit production cost to compete with other fuels
 - Defining next-generation biofuels
 - Establishing a solid 10 year policy framework to secure investment
- 10.20 **PANEL DISCUSSION: Developing a Constant Supply of Bio-Based Feedstocks for Cellulosic Ethanol**
- Moving away from 'food' feedstocks – what are the alternatives and the volumes?
 - From technology enhancements to logistical planning: guaranteeing a sustainable and competitive cellulose supply
- 11.00 Refreshments
- 11.30 **Creating Market Pull For A Biobased Economy Through Policy Instruments**
- 12.00 **Biomaterials – Biochemicals – Biopolymers: The Bioeconomy What are the Options for 1G and 2G Producers?**
- Diversifying into bioplastics and biopolymers
 - Strengthening the bioeconomy link with bioethanol
 - Moving into a new business model to produce not only fuels but biomaterials
 - With agriculture being the raw material will the same issues as with fuel ethanol be encountered? Will biochemicals receive the same opposition?
 - Examining the impact from shale gas on agri-based biochemicals and energy
- 12.30 Chair's Closing Remarks
- 13.10 Conference Lunch

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Track 3 – Industrial and Beverage Alcohol Focus

*Examining global demand and changing policy and economic drivers for industrial
and beverage alcohol*

- 08.00 **Welcome Coffee**
- 09.10 **Introductory Remarks from the Chair**
- 09.20 **Imports to Destabilise EU Non-Fuel Ethanol Market ?**
- 09.50 **The US Market for High Grade Ethanol**
- 10.20 **Alcohol Demand in China to Level Off?**
- 10.50 Refreshments
- 11.20 **Beverage Alcohol in Southern Africa**
- 11.50 **Russia's Strategy for Alcohol Export Markets**
- 12.20 **Industrial Scale Alcohol from Coal**
- 12.50 Chair's Closing Remarks
- 13.10 Conference Lunch

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Wednesday 06 November PM

Track 1 Continued– Reinventing First Generations Ethanol Plants

Responding to Market Conditions and Improving Your Margins

- 14.20 **Introductory Remarks from the Chair**
- 14.25 **Algae Co-Location – Using CO2 to Produce Algae**
- 14.55 **Switchover to Biobutanol? Assessing the Viability of Converting Ethanol to Butanol Fuels**
- 15.25 **Expanding Capacity With a Cellulosic Ethanol Add-On**
- 16.10 Refreshments
- 16.40 **Moving Towards Greater Greenhouse Gas Savings**
- 17.10 **Ethanol The Co-Product**
- Diversifying the co-products and hedging against the pressure on ethanol
 - Rationalising to extract the compounds – oil, fibre protein
 - Protein recovery – biorefining to deliver the proteins
 - Valuing co-products: how can this be done?
- 17.40 Closing Remarks from the Chair
- 18.00 **Round Table Discussions**

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Track 2 Continued – 2G Deployment, Biochemicals and Biomaterials

Managing the interdependency between regulation, technology readiness and cost, and financing of a plant

- 14.20 **Introductory Remarks from the Chair**
- CASE STUDIES: Second Generation Business Models for Commercial and Industrial Scale Growth in the Biofuels and Biochemicals**
- 14.20 **Turning Waste to Energy Into A Reality**
- 14.50 **Producing Renewable Diesel and Fuel-Jet in Commercially Viable Volumes**
- 15.20 **Biorefining on an Industry Scale**
- 15.50 Refreshments
- 16.20 **Examining Developments in the Global Marketplace For Green Products**
- 16.50 **Financing Industry Growth for Advanced Biofuels and Biochemicals**
- Options available for financing biorefining projects
 - Overcoming problems that stop investment
 - Understanding what investors are looking for in biofuel projects
 - Examining current financing environment that project developers should focus on
- 17.30 Closing Remarks from the Chair
- 18.00 **Round Table Discussions**

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Thursday 7 November

08.00 Welcome Coffee

09.05 **Introductory Remarks from the Chair**

AROUND THE WORLD:

*Examining Mandates, Government Policy Status, Investment Appetite and
Trade Flows Across the Rest of the World*

- Identifying possible future origins for export supplies
- Identifying new deficit regions around the globe due to new government targets
- Identifying new production opportunities for both 1G and 2G ethanol

09.10 **The Asian Block**

10.10 Questions

10.25 Refreshments

10.55 **The African Block**

11.55 **The Latin American Block**

12.55 Questions

13.10 Closing Remarks from the Chair

13.20 End of Conference

13.30 Lunch