

4th Annual Cellulosic Biofuels Summit 2009

November 16-19, 2009 | Washington, DC

Cellulosic Biofuels Summit 2009

Agenda * November 17-18, 2009

Tuesday, November 17, 2009

7:00 – 8:00 *Registration & Continental Breakfast – Sponsored By:*



8:00 – 8:15 Welcome & Introduction by the Summit Chair
Bob Dinneen, President & CEO,
RENEWABLE FUELS ASSOCIATION

8:15 – 8:45 *Keynote Address:*
**U.S. DEPARTMENT OF ENERGY'S SUPPORT OF CELLULOSIC
BIOFUELS DEVELOPMENT**

Dr. Kristina M. Johnson, Under Secretary,
U.S. DEPARTMENT OF ENERGY

8:45 – 10:00 *Keynote Panel*
THE STATE OF THE CELLULOSIC BIOFUELS INDUSTRY

Driven by the Renewable Fuel Standard (RFS), the fledgling cellulosic biofuels industry is racing to get the plants under construction and producing that can meet the standard's requirements. Yet, creating a new industry is a challenging business. The Summit's opening panel will discuss the state of the industry's progress, the significant developments taking place, and the key challenges that still need to be tackled and the strategies for moving the industry forward over the coming year.

- Government policies supporting the industry—are they sufficient to lead to industry success?
- Plant construction—when can we realistically expect plants to be up and producing? At what volumes?
- Financial environment—will an economic rebound unleash the financial resources needed by the industry?

- Sustainability—what are the crucial issues the industry must address over the coming year?
- Strategic relationships—how are they influencing the industry?
- Technology developments—where can we expect successes?

Moderator: **Todd Alexander**, *Partner*, CHADBOURNE & PARKE, LLP

Panelists:

Douglas Durante, *Executive Director*,

CLEAN FUELS DEVELOPMENT COALITION

Brent Erickson, *Executive Vice President, Industrial & Environmental Section*,

BIOTECHNOLOGY INDUSTRY ORGANIZATION

Michael Leister, *Fuels Technology Manager/Chairman, Fuels Committee*

MARATHON PETROLEUM COMPANY/API

Franz Matzner, *Acting Legislative Director*,

NATURAL RESOURCES DEFENSE COUNCIL

Ted Monoson, *Director of Legislative Affairs*, GROWTH ENERGY

Candace Wheeler, GM Technical Fellow/Research & Development,
GENERAL MOTORS

10:00 – 10:20 *Summit Networking Break – Sponsored By:*



10:20 – 10:50 **BP – STRATEGY & OUTLOOK IN BIOFUELS**

Since 2006, BP has announced investments of more than \$1.5 billion in biofuels research, development and operations, and has investments in production facilities in Europe, Brazil and the US. Vercipia Biofuels, the newly-christened 50-50 joint venture company formed by BP and Verenium, recently initiated development of one of the nation's first commercial-scale cellulosic ethanol facilities in Highland County, Florida. This latest collaboration between the oil industry and the biofuels industry reflects the potential for a variety of such mutually beneficial associations. In this special presentation, the reasons why BP has made the move into biofuels and the opportunities it sees going forward in the US and globally will be explored.

Presenter:

Susan Ellerbusch, *President*, BP BIOFUELS, NORTH AMERICA

BRIEFINGS FROM THE FRONT LINE – PART I

At this stage of industry growth, the critical step is to get an assortment of biorefineries built and operating in order to provide the feedback needed to move to large-scale production. This important work of

development activity is being performed on the frontline by a group of companies endeavoring to move their plants over the finish line. Throughout the *Summit*, these companies will provide briefings on their activities and examine these four, critical areas:

- Project development activities
- Feedstock supply line
- Technology update
- Financing activities

10:50 – 11:10 DEVELOPER BRIEFING

Presenter:

Jeff Passmore, *Executive Vice President*, IOGEN CORPORATION

11:10 – 11:30 DEVELOPER BRIEFING

Presenter:

Cynthia Bryant, *Global Biomass Business Development Manager*, NOVOZYMES

11:30 – 11:45 *Summit Networking Break – Sponsored By:*



11:45 – 12:05 DEVELOPER BRIEFING

Presenter:

Wesley J. Bolsen, *Chief Marketing Officer, Vice President of Business Development*, COSKATA, INC.

12:05– 12:25 DEVELOPER BRIEFING

Presenter:

Kevin A. Gray, *Chief Technology Officer*, QTEROS, INC.

12:25 – 12:45 DEVELOPER BRIEFING

Presenter:

Sam McConnell, *Senior VP, Corporate Development*, MYRIANT TECHNOLOGIES LLC

12:45 – 2:00 *Summit Group Luncheon – Sponsored By:*



2:00 – 3:00 **FEEDSTOCK SUPPLY LINES: A PROGRESS REPORT**

The availability of sustainable, cost-effective, stably-priced feedstock supplies is essential to the growth and long-term viability of a cellulosic biofuels industry. Whether it is dedicated fuel crops, crop residues, woody biomass or urban waste, developing the feedstock supply lines on the scale needed to support a full-blown industry is a challenge requiring a dedicated effort. The panelists will discuss some of the pioneering activities of the past year in building a feedstock supply line infrastructure, including the notable developments in the biomass to power market, and the next steps to be taken to get this infrastructure ready for prime time.

- What notable steps have been taken to build a feedstock supply chain in the past year?
- What supply lines are being developed in the biomass to power market and what lessons do they give the cellulosic biofuels industry?
- What will be the impact on prices from competition for biomass feedstocks from power producers?
- What, if any, has been the impact of EPA's RFS rulemaking?
- Are there any relevant trends in pricing, business models, or types of relationships developing in the marketplace?
- What issues must be overcome to attract widespread feedstock supplier commitment to the industry?
- What are the lessons from rising corn prices on corn ethanol that the cellulosic ethanol must heed?
- What needs to be the plan of action for the next year?

Moderator: **Gregory J. Lynch**, *Managing Partner*,
MICHAEL BEST & FRIEDRICH LLP

Panelists:

Bob Emory, *Environmental Affairs Manager*, *Southern Timberlands*,
WEYERHAEUSER COMPANY

Steve A. Flick, *President & Chairman of the Board*,
SHOW ME ENERGY COOPERATIVE

Michael Manella, *Scientist II*, ARCHER DANIELS MIDLAND

Anna Rath, *Vice President of Commercial Development*, CERES, INC.

David P. Tenny, *President & CEO*,
NATIONAL ALLIANCE OF FOREST OWNERS

3:00 – 3:15 *Summit Networking Break Sponsored By:*



BRIEFINGS FROM THE FRONT LINE - PART II

Our afternoon session features another series of leading developers who provide a briefing on their respective company's status on project development activities, feedstock supply strategies, a technology update and financing activities.

3:15 – 3:35 DEVELOPER BRIEFING

Presenter:

Stuart Thomas, *Vice President, Technology & Licensing*,
DUPONT DANISCO CELLULOSIC ETHANOL

3:35 – 3:55 DEVELOPER BRIEFING

Presenter:

Bill Schafer, *Senior Vice President of Business Development and Government Affairs*, RANGE FUELS

3:55 – 4:15 DEVELOPER BRIEFING

Presenter:

Gerson Santos-Leon, *Director*,
ABENGOA BIOENERGY NEW TECHNOLOGIES

4:15 – 4:30 *Summit Networking Break – Sponsored By:*



4:30 – 4:50 DEVELOPER BRIEFING

Presenter:

Vincent Chornet, *President & CEO*, ENERKEM

4:50 – 5:10 DEVELOPER BRIEFING

Presenter:

John Howe, *Vice President, Public Affairs*, VERENIUM

5:10 – 5:30 DEVELOPER BRIEFING

Presenter:

Arnold Klann, *Chairman/President/CEO*,
BLUEFIRE ETHANOL, INC.

5:30 – 6:30 *Cellulosic Biofuels Summit Reception – Sponsored By:*



Wednesday, November 18, 2009

7:00 – 8:00 *Continental Breakfast – Sponsored By:*



8:00 – 8:05 **WELCOME & INTRODUCTION BY THE CHAIRMAN**
Bob Dinneen, *President & CEO*,
RENEWABLE FUELS ASSOCIATION

8:05 – 8:45 *Keynote Address:*
EPA RFS 2 RULE MAKING UPDATE
Paul N. Argyropoulos, *Senior Policy Advisor, Office of Transportation & Air Quality*, ENVIRONMENTAL PROTECTION AGENCY

8:45 – 9:45 **AGRICULTURE, FORESTRY & THE BIOFUELS INDUSTRY IN A REDUCED CARBON ECONOMY**

America is on a glide path to reduce its carbon footprint and policy makers are searching for measures to reduce greenhouse gas (GHG) emissions. The current Renewable Fuel Standard requires cellulosic biofuels to achieve a 60 percent GHG emissions reduction compared to baseline lifecycle GHG emissions. Under pending U.S. cap-and-trade legislation, GHG emissions nationally would be reduced by 83 percent by 2050 compared to 2005 levels. The agriculture and forestry sectors and biofuels industry are well positioned to provide valuable low carbon sources of energy as well as carbon reduction services. The panelists will discuss how biofuels displace fossil fuels with greater GHG emissions and how the production of biomass feedstocks captures and sequesters carbon dioxide, a primary GHG. Topics to be covered include:

- The size of the sequestration opportunity
- Potential economic opportunities and challenges
- Biofuel contributions to reducing GHG emissions
- Path forward for calculating lifecycle GHG emissions of biofuels

Moderator: **Ernie Shea**, *Project Coordinator, 25 X 25*

Panelists:

Antonio Bento, *Associate Professor, Applied Economics & Management*, CORNELL UNIVERSITY

Geoff Cooper, *Vice President, Research*,
RENEWABLE FUELS ASSOCIATION

Jimmy Daukus, *Managing Director, Agriculture & Environment*,
AMERICAN FARMLAND TRUST

Christopher Galik, *Research Coordinator, Climate Change Policy Partnership, DUKE UNIVERSITY*
James Sturdevant, *Director of Project Liberty, POET*
Tim Warman, *Executive Director, Global Warming Program, NATIONAL WILDLIFE FEDERATION*

9:45 – 10:15 *Summit Networking Break – Sponsored By:*



BRIEFINGS FROM THE FRONT LINE – PART III

In our third and final set of briefings, the accent is on biotechnology, featuring status reports on advanced biofuels such as butanol and the development of enhanced yield technology for conventional row crops as well as second generation bioseeds and feedstocks.

10:15 – 10:35 **DEVELOPER BRIEFING**

Presenter:

Neal Gutterson, *President & CEO, MENDEL BIOTECHNOLOGY*

10:35 – 10:55 **DEVELOPER BRIEFING**

Presenter:

David Glassner, Ph. D., *Executive Vice President of Technology, GEVO*

10:55 – 11:15 **DEVELOPER BRIEFING**

Presenter:

David Isaacs, *Senior Vice President of Government Relations, SOLAZYME*

11:15 – 12:15 **DEVELOPING THE BIOFUELS DISTRIBUTION INFRASTRUCTURE**

A critically important piece in the building out of the cellulosic biofuels value chain is the distribution infrastructure—getting biofuels transported, dispensed, and into vehicles that can handle higher-level blends. The panelists will report on some of the significant activities taking place in developing this essential part of the industry.

- Activities underway to increase blend levels
 - Petition to EPA for approval of 15% blends
 - DOE testing of 20% blends

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- UL approval of dispensing equipment of biofuel blends
- The challenges and successes of fuel marketers' efforts in penetrating the marketplace
- The impact of auto industry reorganization on the future supply of vehicles that can accept high-level blends

Moderator: **Graham Noyes**, *Of Counsel*, STOEL RIVES LLP

Panelists:

Karl Doenges, *Executive Director*, PROTEC FUEL MANAGEMENT

John Eichberger, *Vice President, Government Relations*,
NATIONAL ASSOCIATION OF CONVENIENCE STORES

Burl Haigwood, *President*,
FLEXFUEL VEHICLE CLUB OF AMERICA

Claire Kammer, *Manager, Government Affairs*
UNDERWRITERS LABORATORIES

John McKnight, *Director, Environmental & Safety Compliance*,
NATIONAL MARINE MANUFACTURERS ASSOCIATION

12:15

The Summit Adjourns