

# CELLULOSIC ETHANOL SUMMIT

**Integrating Communities in the Value Chain to Build a New Industry**

OCTOBER 15-17, 2007 • WASHINGTON, DC

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## SUMMIT AGENDA

### October 16, 2007

8:30 – 8:45 **Welcome & Introduction by the Summit Chairman**  
**Bob Dinneen**, *President & CEO*, RENEWABLE  
FUELS ASSOCIATION (RFA)

8:45 – 9:15



### Keynote Address

**The Honorable Jay Inslee**  
*U.S. Representative*  
(D-WA)

9:15 – 10:15 **GOVERNMENTAL SUPPORT OF THE CELLULOSIC  
ETHANOL INDUSTRY**

The U.S. Government is a major proponent of cellulosic ethanol. In its efforts to support the industry's growth—and establish overall energy and climate policy—a number of proposals for loan guarantees, tax incentives and other supports are under consideration. This panel will provide a status report on what actions can be expected out of the nation's capital to support the building of a cellulosic ethanol industry.

Moderators:

**Douglas Durante**, *Executive Director*,  
CLEAN FUELS DEVELOPMENT COALITION  
**Burl Haigwood**, *Director of Program Development*,  
CLEAN FUELS DEVELOPMENT COALITION

Panelists:

**Jonathan Coppess**, *Agriculture & Energy Legislative Assistant*,  
OFFICE OF BEN NELSON, U.S. SENATE  
**Tracy Nagelbush**, *Senior Policy Advisor for Energy, Environment and  
Agriculture*, U.S. REP. JAY INSLEE (D-WA)  
**Christopher Schepis**, *Legislative Director*,  
OFFICE OF U.S. REP. JOHN BARROW (GA-12)  
**Aaron Whitesel**, *Agriculture Legislative Assistant*,  
OFFICE OF RICHARD LUGAR, U.S. SENATE

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10:15 – 10:45 *Value Chain Networking Break*

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10:45 – 12:00 **FARMERS' PROGRESS IN GETTING READY TO SUPPLY  
FEEDSTOCK**

The ability of the agricultural community to grow, harvest, store and transport feedstock on an economic and profitable basis is an important cornerstone of a fully commercialized cellulosic ethanol industry. Now that several biorefineries have been funded and there will be “steel in the ground,” providing feedstock is passing from a theoretical issue to a real, live need. The panelists will discuss how farmers are organizing to meet this need and the business factors that are guiding their decision-making.

- How are farmers organizing to provide feedstock?
- What are the business models they are considering?
- What type of relationships are they pursuing with biorefiners?
- What challenges need to be addressed to attract widespread farmer commitment to the industry?

**Cellulosic Ethanol Summit 2007  
Agenda**

Moderator:

**Greg Lynch**, *Attorney*, MICHAEL BEST & FRIEDRICH

Panelists:

**David Bransby**, *Professor, Energy Crops and Bioenergy*,  
AUBURN UNIVERSITY

**Bill Belden**, *Consulting Manager*, PRAIRIE LANDS BIO-PRODUCTS

**Duane Grant**, *Owner*, GRANT 4D FARMS, *Leads IDAHO STRAW  
VALUE-ADDED COMMITTEE (SVAC)*

**Donald Tyler**, *Professor, Soil Management*, UNIVERSITY OF  
TENNESSEE

**Steve Flick**, *Board of Directors*, SHOW ME ENERGY  
COOPERATIVE

12:00 – 1:30 *Group Luncheon*

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*Luncheon Address:*

**AGRICULTURE'S ROLE IN BUILDING A  
NATIONAL CELLULOSIC ETHANOL  
INDUSTRY**

**Chuck Conner**

*Acting Secretary of Agriculture,*  
U.S. DEPARTMENT OF AGRICULTURE

1:30 – 2:45 **THE ENZYMATIC BIOREFINERY DEVELOPER COMMUNITY:  
PUTTING “STEEL IN THE GROUND” AND ITS IMPLICATIONS FOR  
INDUSTRY PROGRESS**

With developers set to build the first series of enzymatic projects, the industry is reaching a major transitional point. This panel of developers will discuss the projects in development and what they portend for cellulosic ethanol industry building.

- What are the plans for the first series of enzymatic projects?
- How are developers working with other players in the value chain to move these projects forward?
- What are the lessons that will be learned from these projects?
- How can these lessons be extrapolated to large-scale production?
- What will these projects teach us about: feedstock? technology? production economics?
- What opportunities do these projects create for other industry players?

Moderator:

**Courtney Tuttle**, *Managing Director, Investment Banking*,  
JEFFERIES & COMPANY INC.

Panelists:

**Doug Berven**, *Director of Business Development*, POET  
**Ross MacLachlan**, *President & Chairman*, LIGNOL INNOVATIONS  
CORP.

**Carlos Riva**, *CEO*, VERENIUM CORPORATION

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

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2:45 – 3:15 *Value Chain Networking Break*

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3:15 – 4:15 **THE NON-ENZYMATIC BIOREFINERY DEVELOPER  
COMMUNITY'S PLAN AND ACTIVITIES**

Non-enzymatic developers are also moving forward to build new plants. Non-enzymatic plants, however, are driven by different requirements and must be supported by a different value chain. This group of developers will discuss their plans and what they mean for the industry.

- What are the projects and activities of the non-enzymatic developer community?
- How are developers working with other players in the value chain to move these projects forward?
- What technologies are being deployed?
- What are the lessons that will be learned from these projects?
- What opportunities do these projects create for other industry players?

Moderator:

**John McKinsey**, *Partner*, STOEL RIVES LLP

Panelists:

**Craig Evans**, *Representative*, ALICO, INC.

**Arnold Klann**, *President*, BLUEFIRE ETHANOL, INC.

**Ben Thorp**, *President*, FLAMBEAU RIVER BIOREFINERY, LLC

**Bill Lee**, *GM*, CHIPPEWA VALLEY ETHANOL CO.

4:15 – 5:30 **THE INDUSTRIAL BIOTECH COMMUNITY'S QUEST TO DEVELOP EFFICIENT, COST EFFECTIVE ENZYMES AND YEASTS**

The ability of the industrial biotech community to deliver more efficient and economical enzymes and yeasts, which will drive down cellulosic ethanol production costs, is a key milestone on the path to commercialization. Members of this community will outline the progress achieved over the past year, identify the chief challenges remaining, and describe their interactions with the technology developers.

- What development path is the industrial biotech community pursuing to develop more efficient enzymes and yeasts?
- What progress has the community made in the past year?
- What hurdles does the community still need to overcome to make breakthroughs in production costs?
- What is the projected timeline for overcoming these hurdles?
- What business models and financial arrangements does the community need to support its success?

Moderator:

**Patrick McCroskey**, *CFO*, CERES, INC.

Panelists:

**Bill Baum**, *Executive Vice President and General Manager, Specialty Enzymes*, VERENIUM CORPORATION

**David Glassner**, *Vice President, Bioprocessing and Engineering*, GEVO, INC.

**Jack Huttner**, *Vice President*, GENENCOR INTERNATIONAL

**Emmanuel Petiot**, *Global Business Development Manager, Biomass*, NOVOZYMES

5:30 – 7:00 **THE SUMMIT RECEPTION**

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October 17, 2007

8:00 – 8:45



Keynote Address:

**John Mizroch**

*Deputy Assistant Secretary  
U.S. Department of Energy*

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8:45 – 10:00

**THE FINANCIAL COMMUNITY'S PERSPECTIVES ON THE VALUE CHAIN**

The willingness of the financial community to become active players in the cellulosic ethanol industry is essential to its success. This panel of representatives from the financial community will share their current perspectives on the industry and outline the key elements that need to be in place in order to receive financial community backing. They will describe the criteria they will use when making investment and lending decisions, the terms they will be seeking, and the level of investments they are prepared to make.

- What factors need to be in place for the financial community to fully commit to the industry?
- What price points are driving investment decision-making?
- How do government supports, loans, or other supports fit into its thinking?
- How do technology risks affect its decision-making?

Moderator:

**Christopher Groobey**, *Partner*, BAKER & MCKENZIE, LLP

Panelists:

**Brian Bolster**, *Vice President*, GOLDMAN SACHS & COMPANY

**Paul Ho**, *Director, Head of Biofuels and Alternative Fuels*,  
CREDIT SUISSE

**Jerome Peters**, *Senior Vice President*, TD BANKNORTH

**William Lese**, *Managing Director*, BRAEMAR ENERGY

VENTURES LLC

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10:00 – 10:30 *Value Chain Networking Break*

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10:30 – 11:15 **FEDERAL POLICIES AND REGULATIONS – INFLUENCING FACTORS ON FUTURE FUELS**

**Paul Agryropoulos**, *Office of Transportation and Air Quality*,  
ENVIRONMENTAL PROTECTION AGENCY

11:15 – 12:30 **DRIVING MARKET DEMAND FOR CELLULOSIC ETHANOL: INDUSTRY PERSPECTIVES**

Driving and supporting a high level of market demand for cellulosic ethanol requires the industry to determine the blend levels to be used in the market and then develop the infrastructure to support its use. The panelists will discuss how the industry is working to determine which blend levels will prevail in the market and what plans are underway to provide the underlying supporting infrastructure.

- What are the factors in the evaluation of E85 or higher blend levels?
- How will the industry lock into a blend level? Will it be determined by government mandate?
- What is a realistic timeline for determining a market standard?
- What are automakers' plans to support these blend levels?
- What is the position of the auto industry in regard to the use of E20 in non-flexible fuel vehicles?
- What is the position of the auto industry in regards to the use of E20 in flexible fuel vehicles?

Moderator:

**Douglas Durante**, *Executive Director*,  
CLEAN FUELS DEVELOPMENT COALITION

Panelists:

**John Eichberger**, *Vice President of Government Relations*,  
NATIONAL ASSOCIATION OF CONVENIENCE STORES  
(NACS)

**Coleman Jones**, *Biofuel Implementation Manager*, GENERAL  
MOTORS CORPORATION

**Phillip Lampert**, *Executive Director*, NATIONAL ETHANOL  
VEHICLE COALITION

**Scott W. Schramm**, *Manager - Regulatory & Technical Affairs*,  
DAILMER CHRYSLER