

BRINGING CAPITAL TO BIOENERGY TECHNOLOGIES

**4TH STAKEHOLDER PLENARY MEETING OF THE
EUROPEAN BIOFUELS TECHNOLOGY PLATFORM**

ROBERTO RODRIGUEZ LABASTIDA

14 SEPTEMBER 2011



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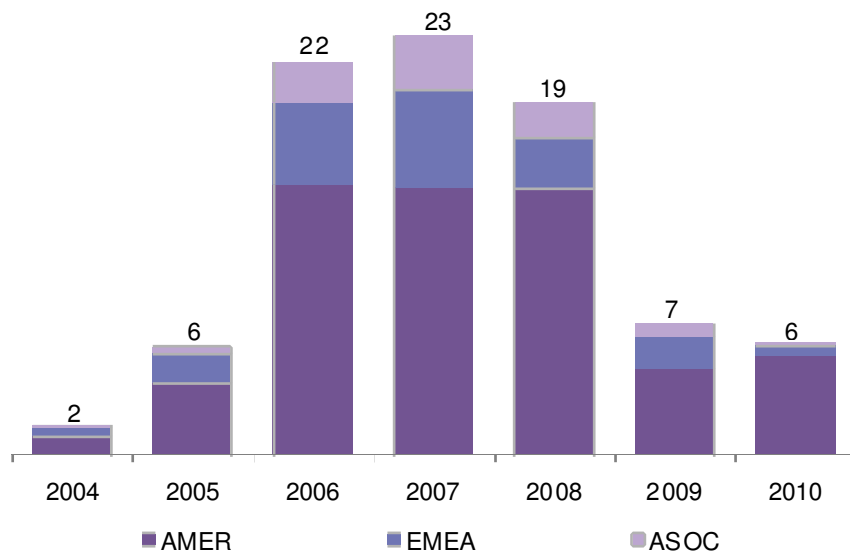
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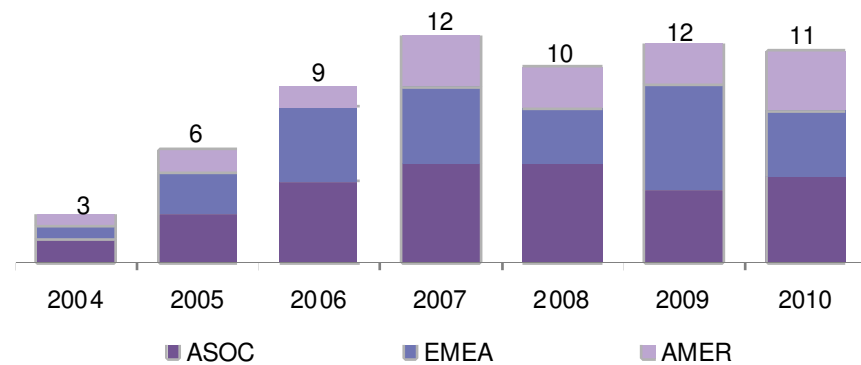
Next-generation biofuels stakeholder survey

TOTAL BIOENERGY INVESTMENT BY SECTOR, 2004-10 (\$BN)

BIOFUELS



BIOMASS AND WASTE-TO-ENERGY

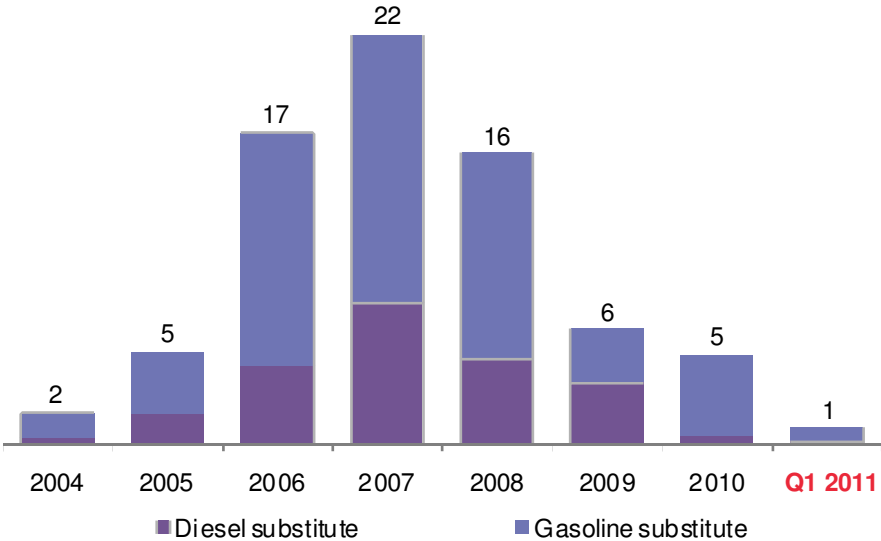


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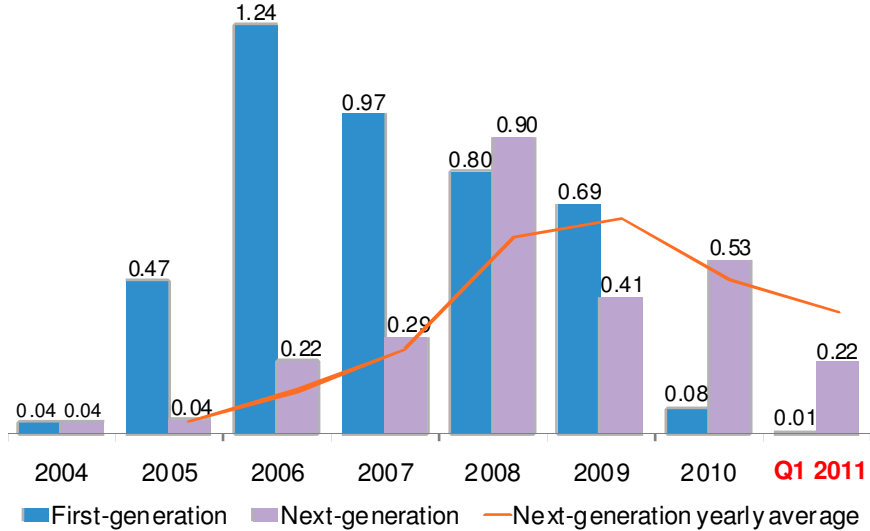
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BIOFUELS INVESTMENT TRENDS, 2004- Q1 2011 (\$BN)

ASSET FINANCING



FIRST-GENERATION VERSUS NEXT-GENERATION VC/PE INVESTMENT



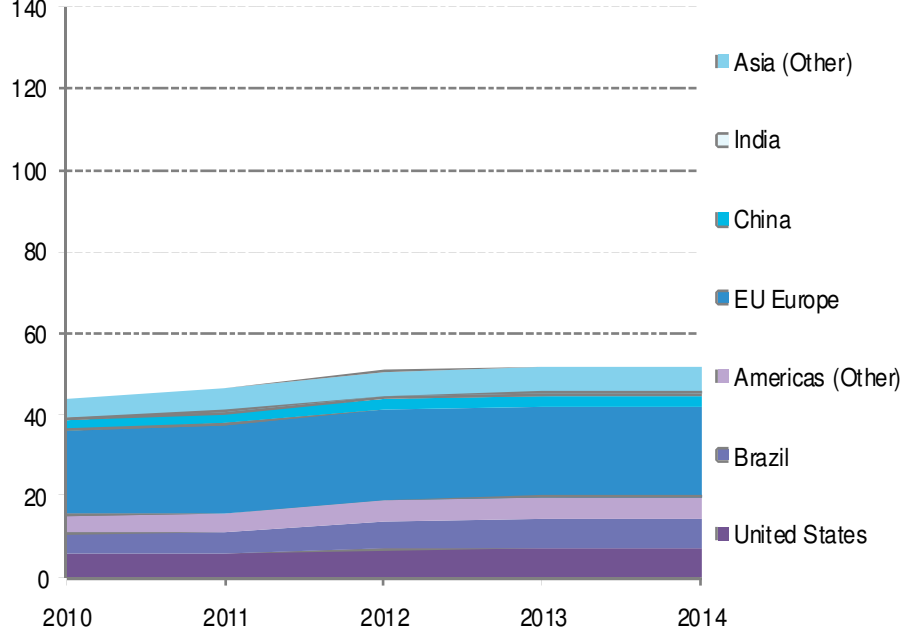
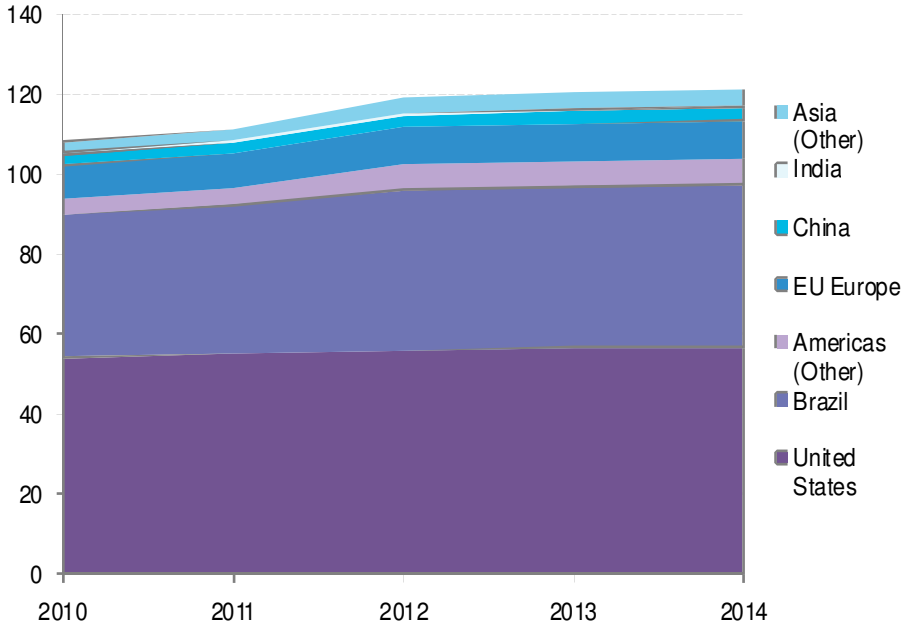
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BIOFUELS INSTALLED CAPACITY, 2010- 2014(BILLION LITRES)

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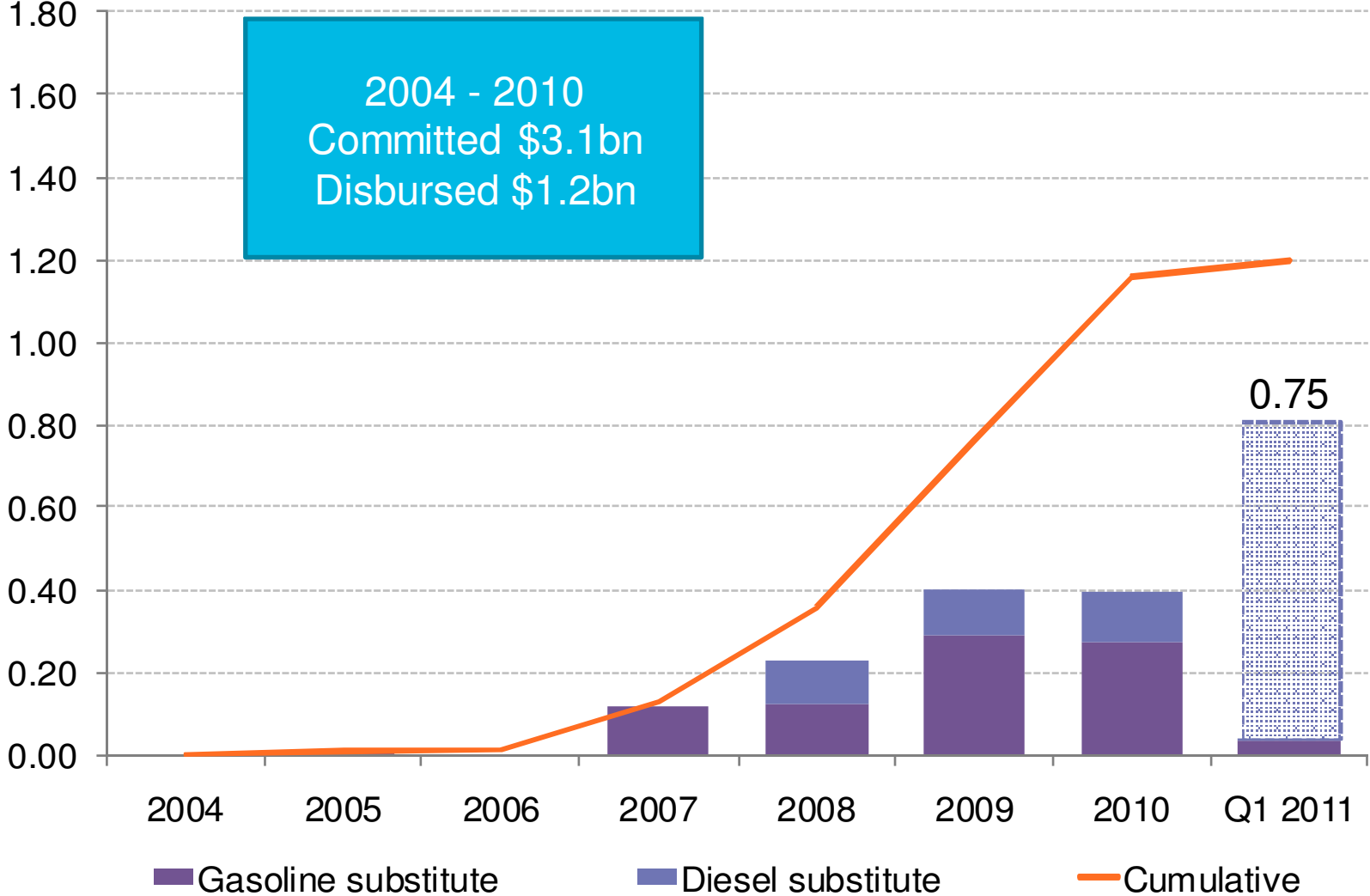
DIESEL SUBSTITUTES



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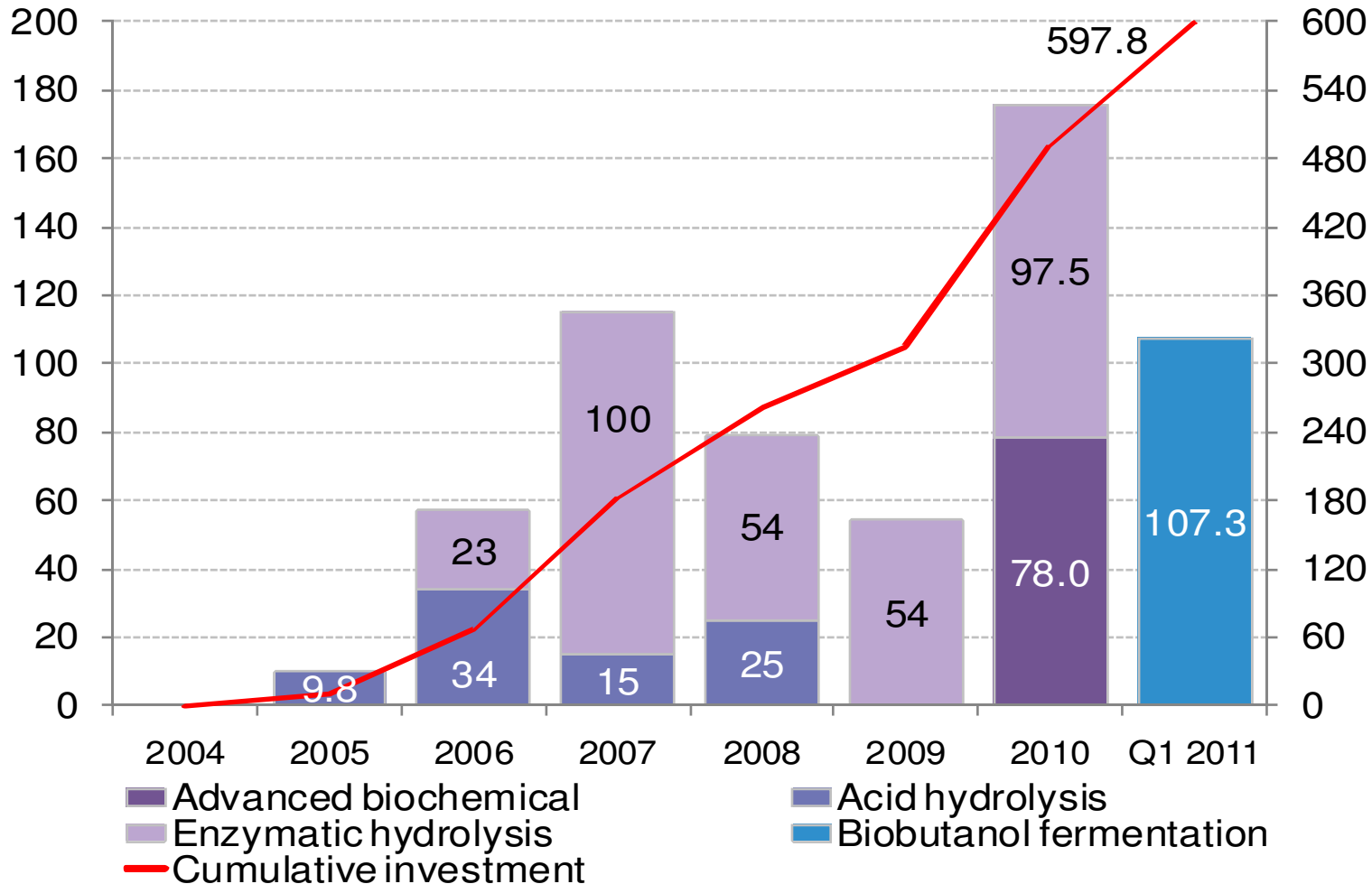
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NEXT-GENERATION US GOVERNMENT DISBURSED INVESTMENT 2004-Q1 2011 (\$BN)



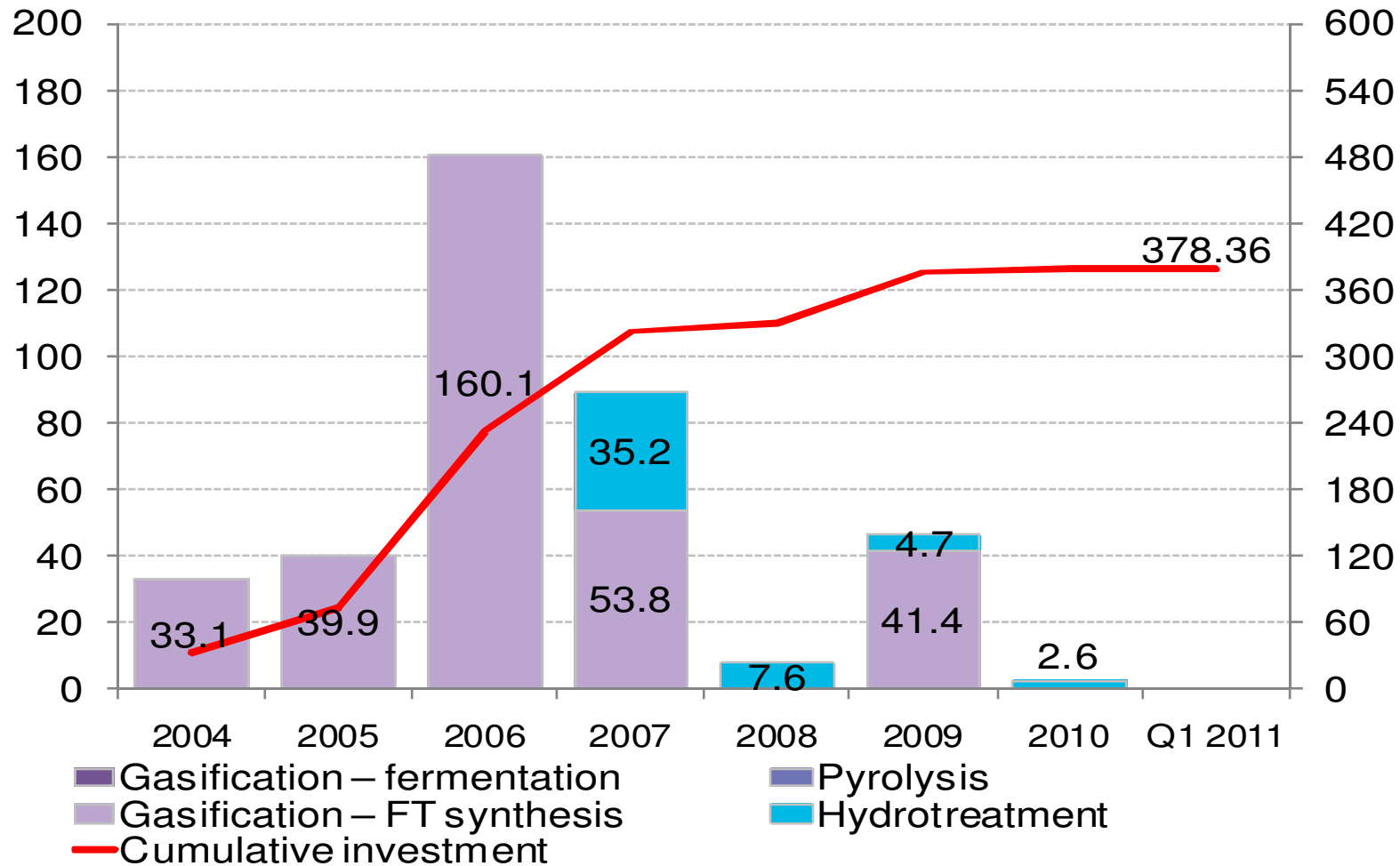
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PUBLIC MARKETS INVESTMENT IN BIOCHEMICAL TECHNOLOGIES, 2004-Q1 2011 (\$M)



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PUBLIC MARKETS INVESTMENT IN THERMOCHEMICAL TECHNOLOGIES, 2004-Q1 2011 (\$M)



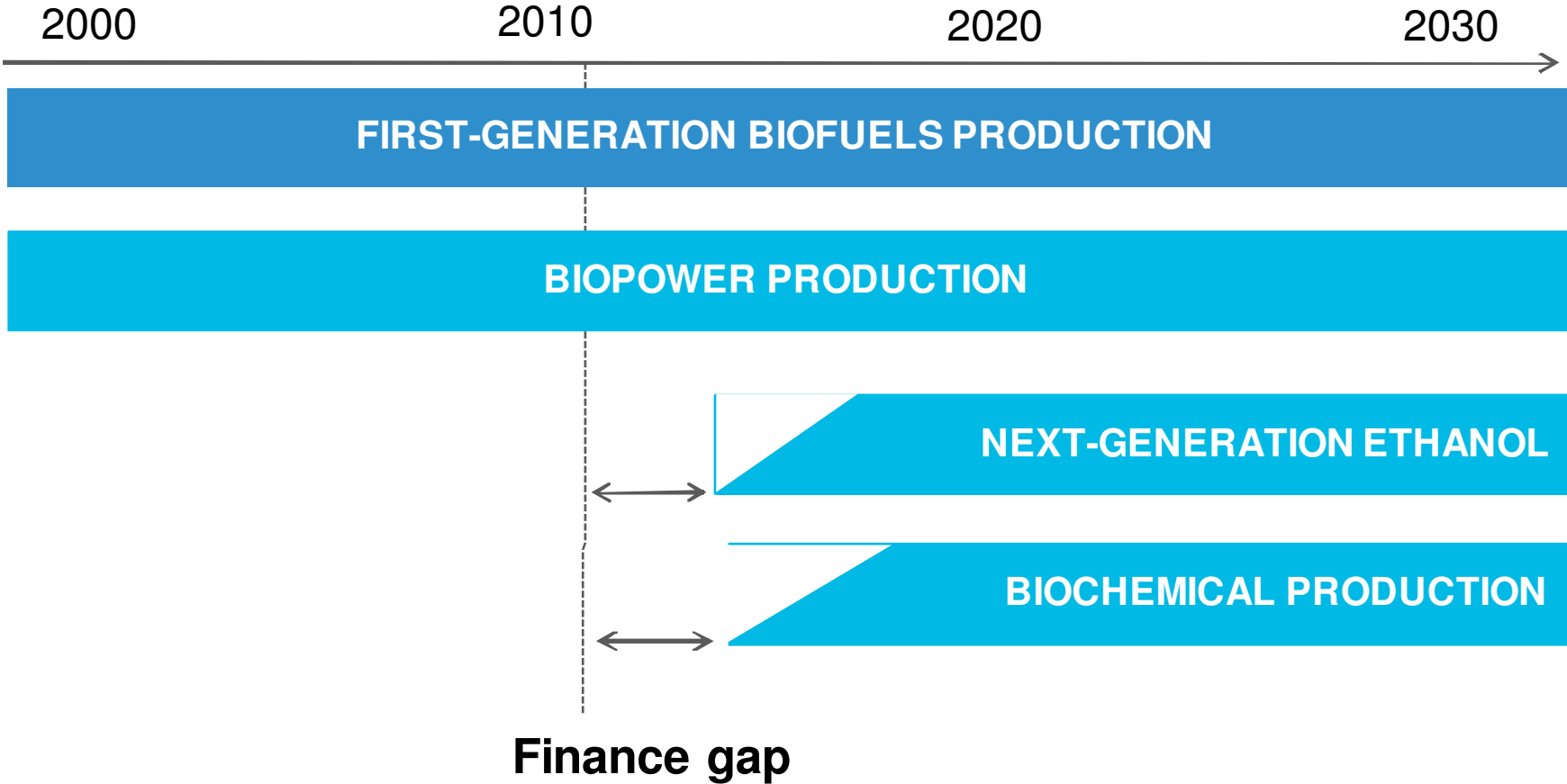
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BIOPRODUCT INDUSTRY DEVELOPMENT, 2000-2030



WHY IS THE NEXT-GENERATION BIOFUEL INDUSTRY ATTRACTIVE?

Answers	Decouples from food chain	Existing mandates	Growth potential	Lower emissions	Ready to scale
Developers	●	●	●	●	●
Oil majors	●	●	●	●	●
Financial community	●	●	●	●	●
Total	●	●	●	●	●

Note: ● no impact, ● minimal impact, ● medium impact, ● major impact, ● significant impact

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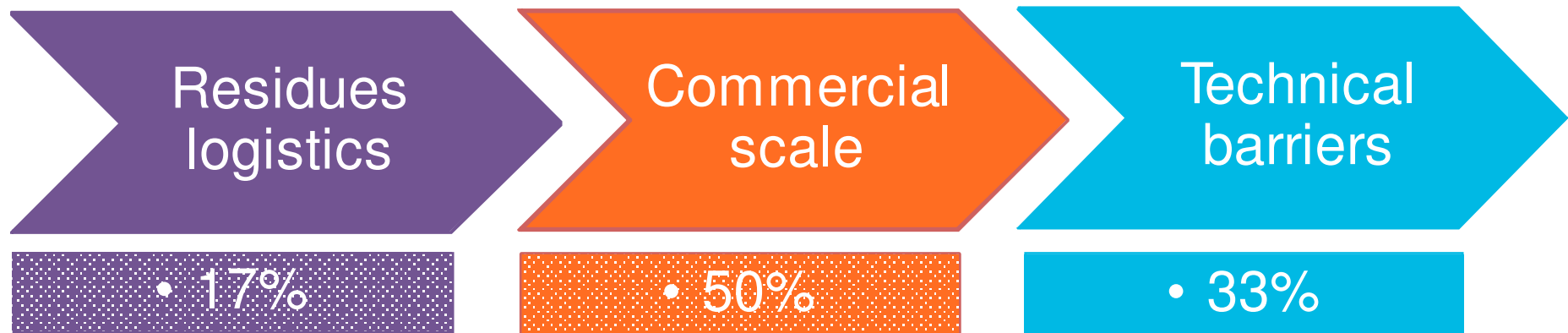
WHAT ARE THE INDUSTRY BARRIERS?

Answers	Technology inconsistency	Weak policy	High capital costs	Risk mitigation	Production economics	Offtake agreements	Feedstock logistics
Developers	●	●	●	●	●	●	●
Oil majors	●	●	●	●	●	●	●
Financial community	●	●	●	●	●	●	●
Total	●	●	●	●	●	●	●

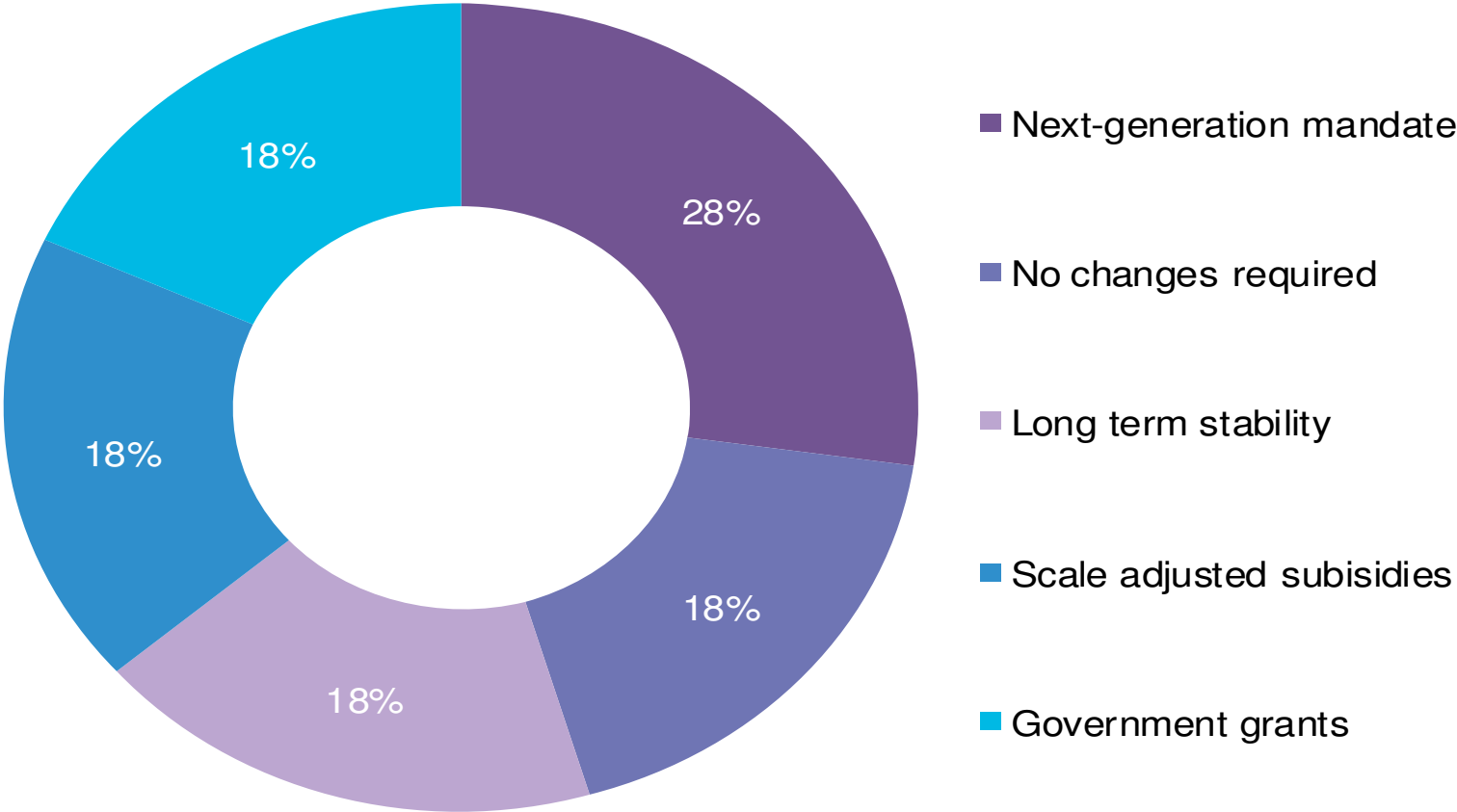
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WHAT ARE THE VALUE CHAIN DEVELOPMENTAL PRIORITIES?



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