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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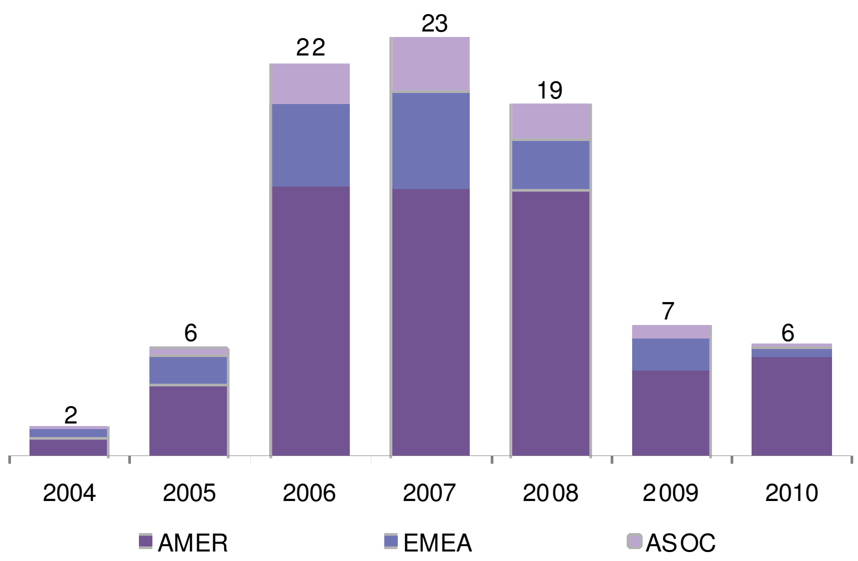
Global bioenergy investment trends

Next-generation biofuels stakeholder survey

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

BIOFUELS



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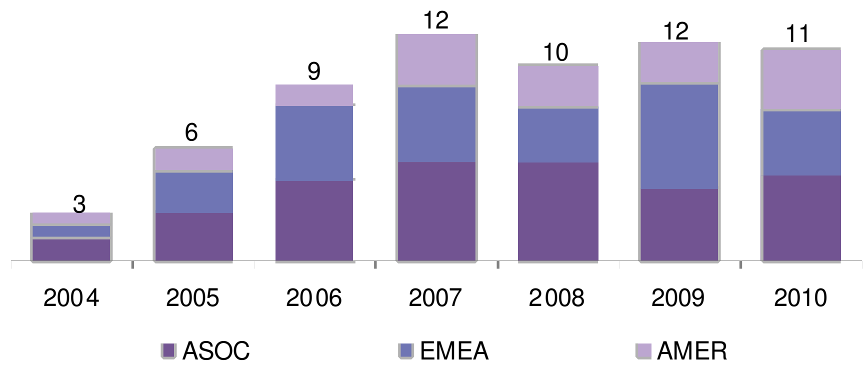
BIOMASS AND WASTE-TO-ENERGY



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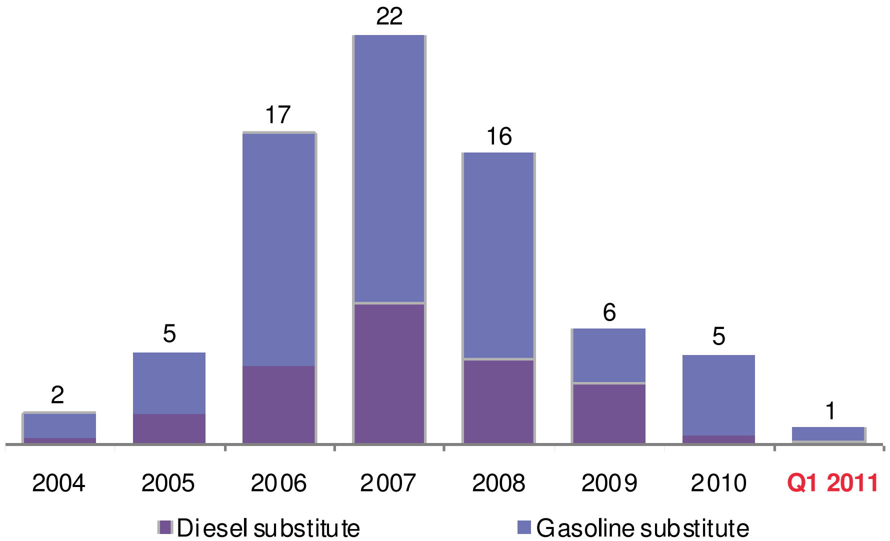
BIOFUELS INVESTMENT TRENDS, 2004- Q1 2011 ($BN)

ASSET FINANCING



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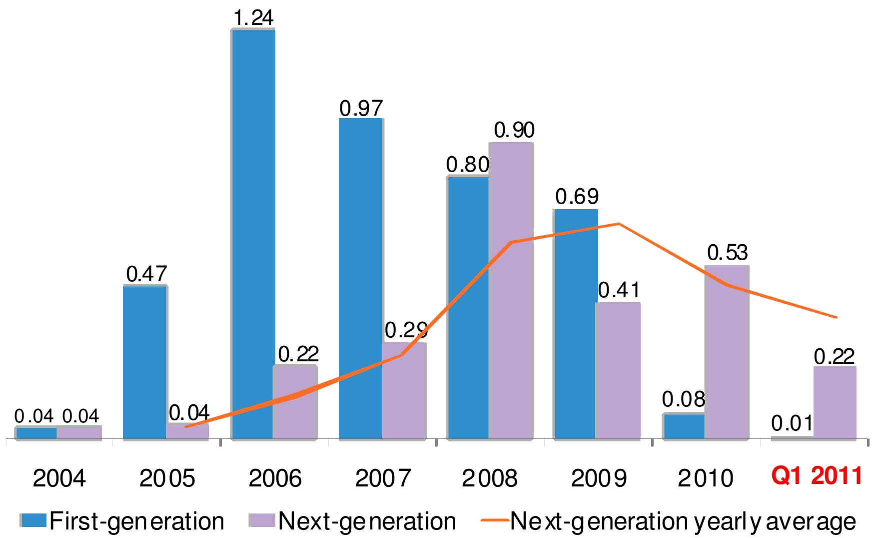
FIRST-GENERATION VERSUS NEXT-GENERATION VC/PE INVESTMENT



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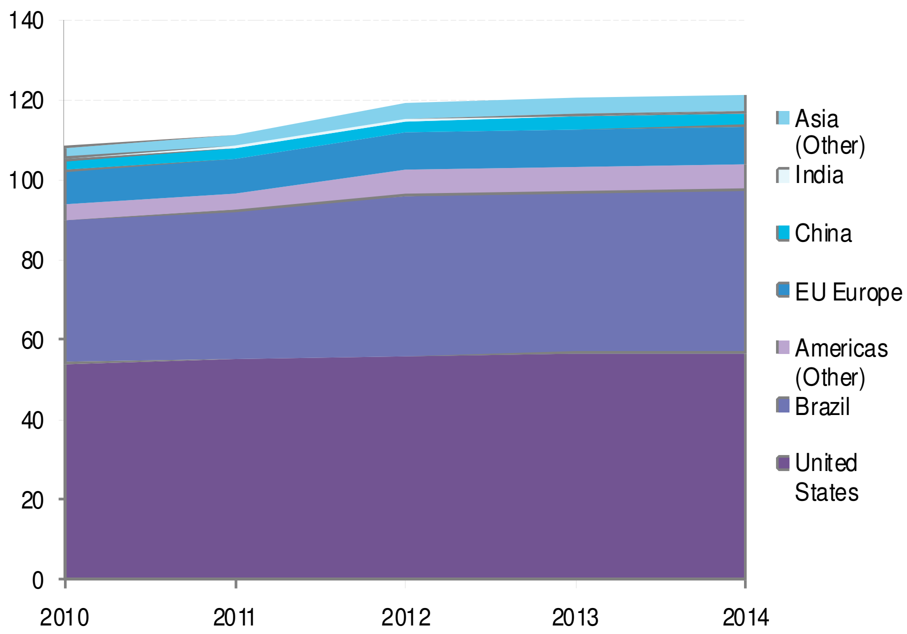
BIOFUELS INSTALLED CAPACITY, 2010- 2014(BILLION LITRES)

ETHANOL



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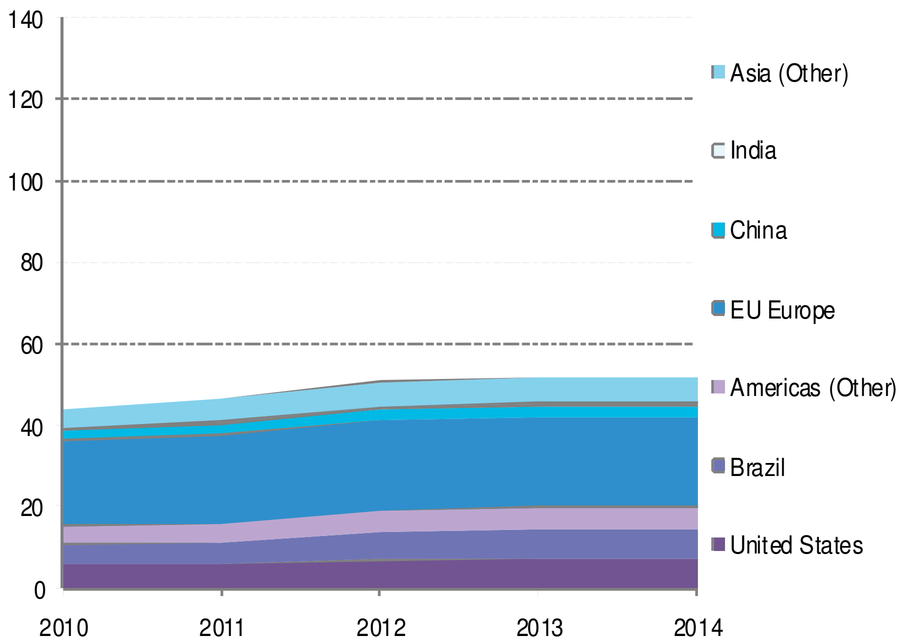
DIESEL SUBSTITUTES



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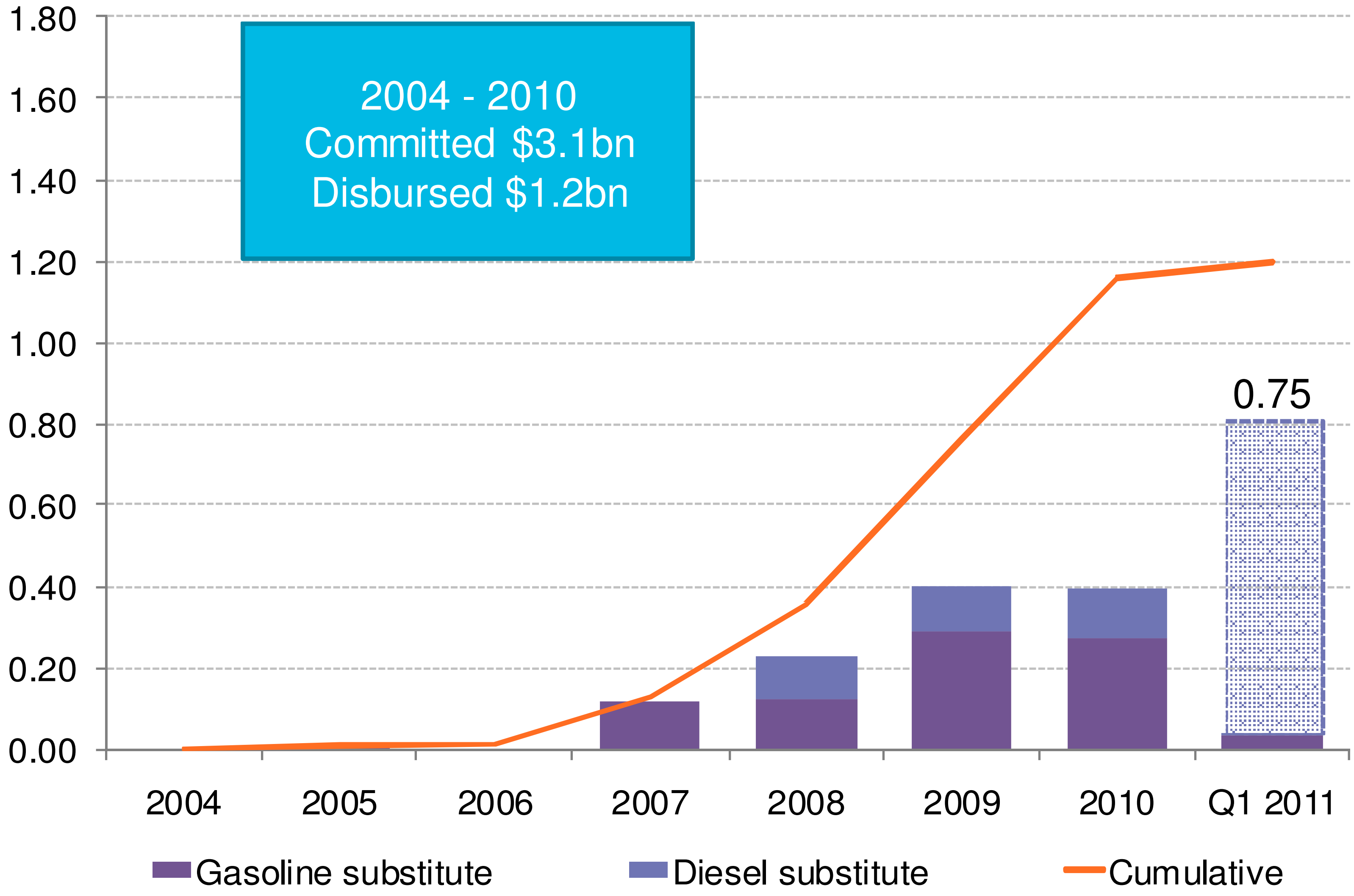
NEXT-GENERATION US GOVERNMENT DISBURSED INVESTMENT 2004-Q1 2011 ($BN)



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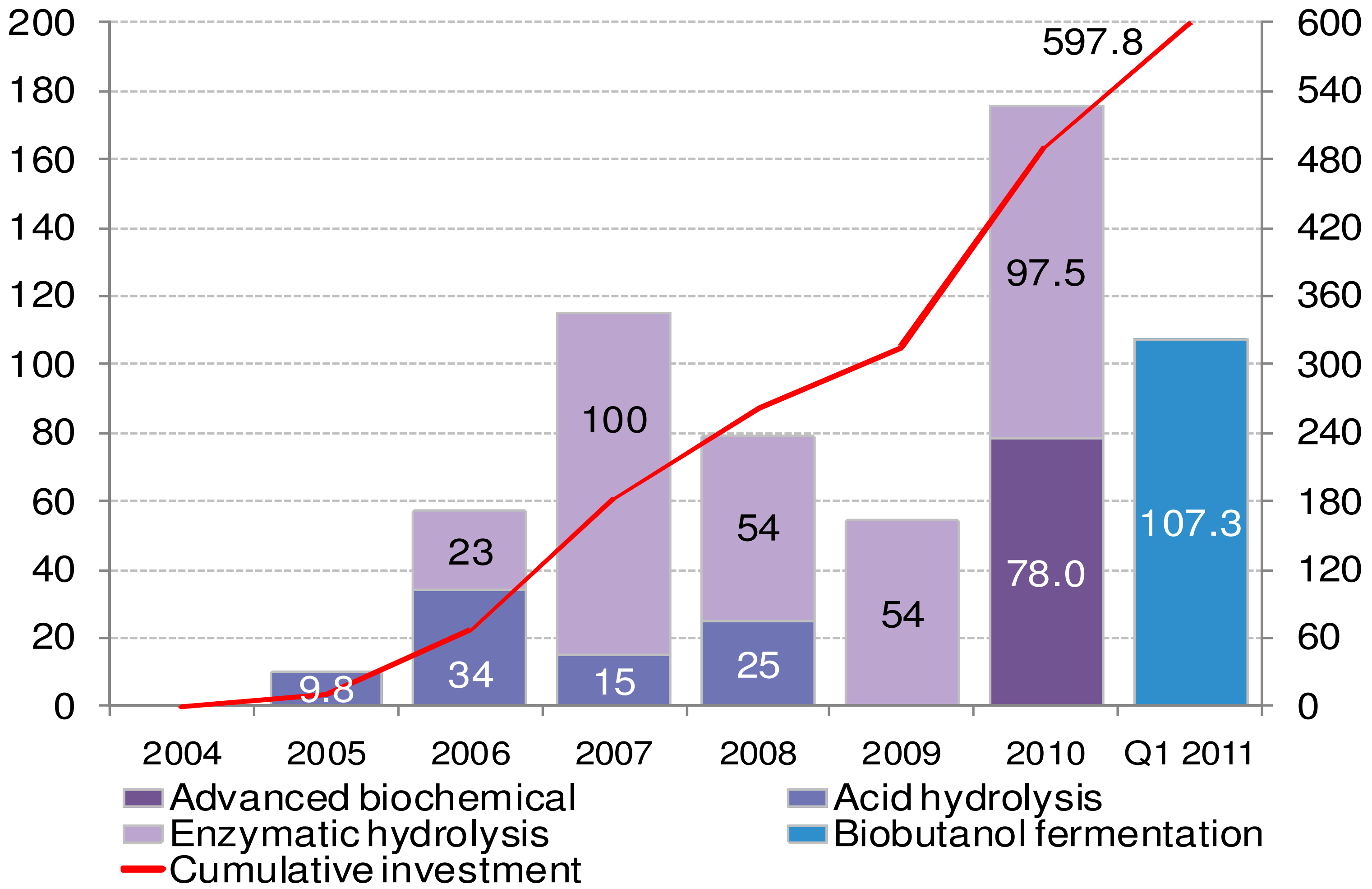
PUBLIC MARKETS INVESTMENT IN BIOCHEMICAL TECHNOLOGIES, 2004-Q1 2011 ($M)



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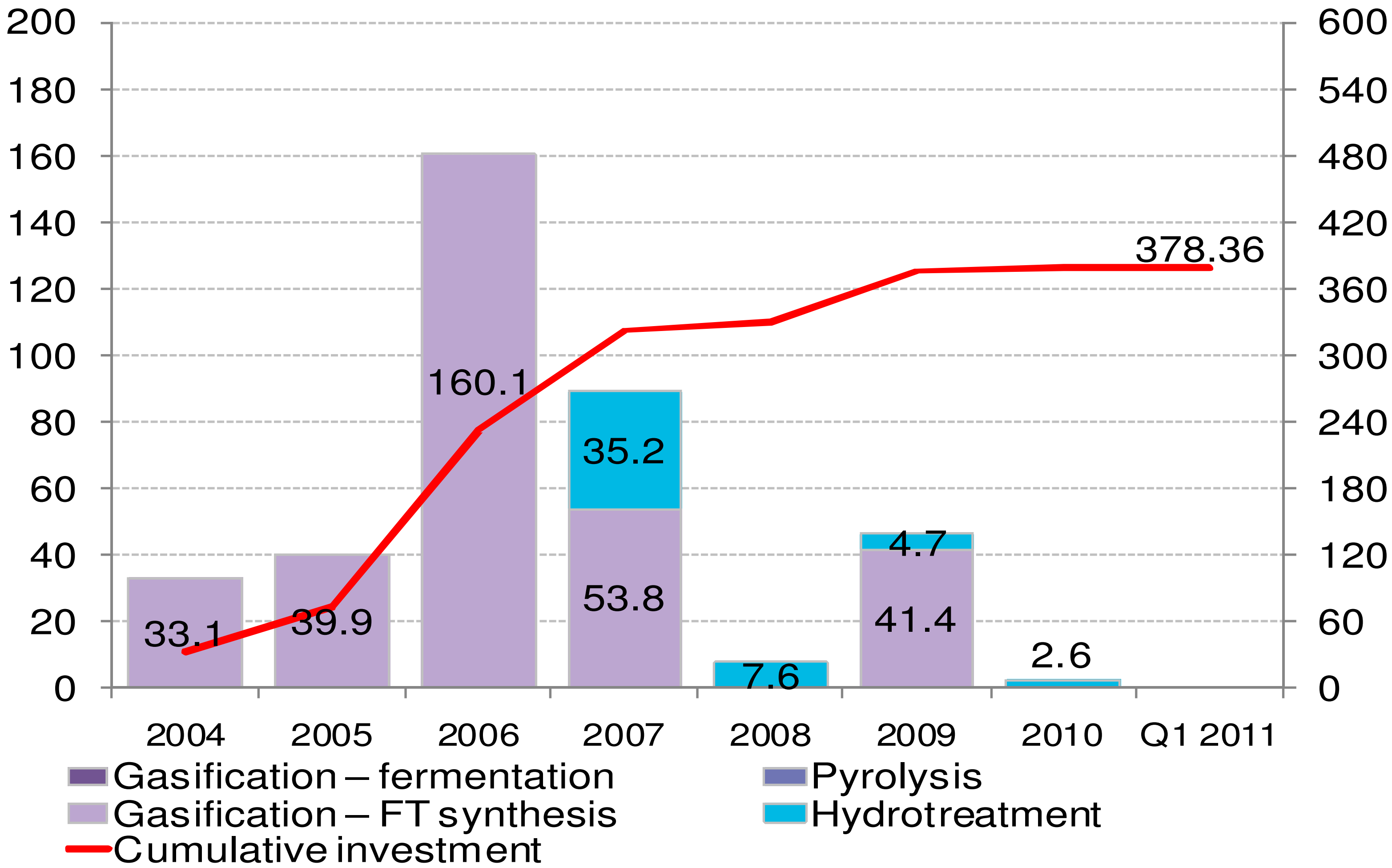
PUBLIC MARKETS INVESTMENT IN THERMOCHEMICAL TECHNOLOGIES, 2004-Q1 2011 ($M)



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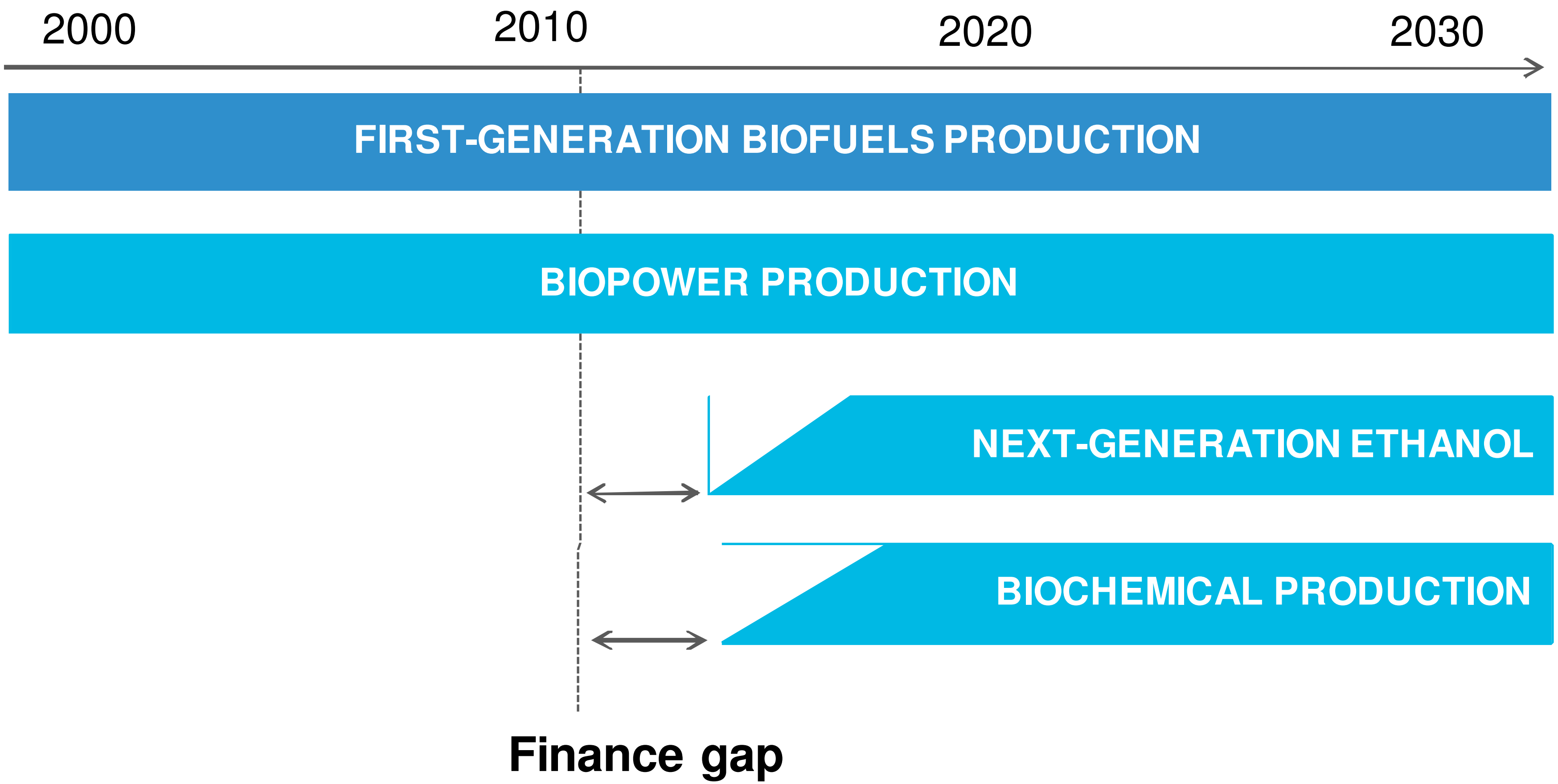
BIOPRODUCT INDUSTRY DEVELOPMENT, 2000-2030



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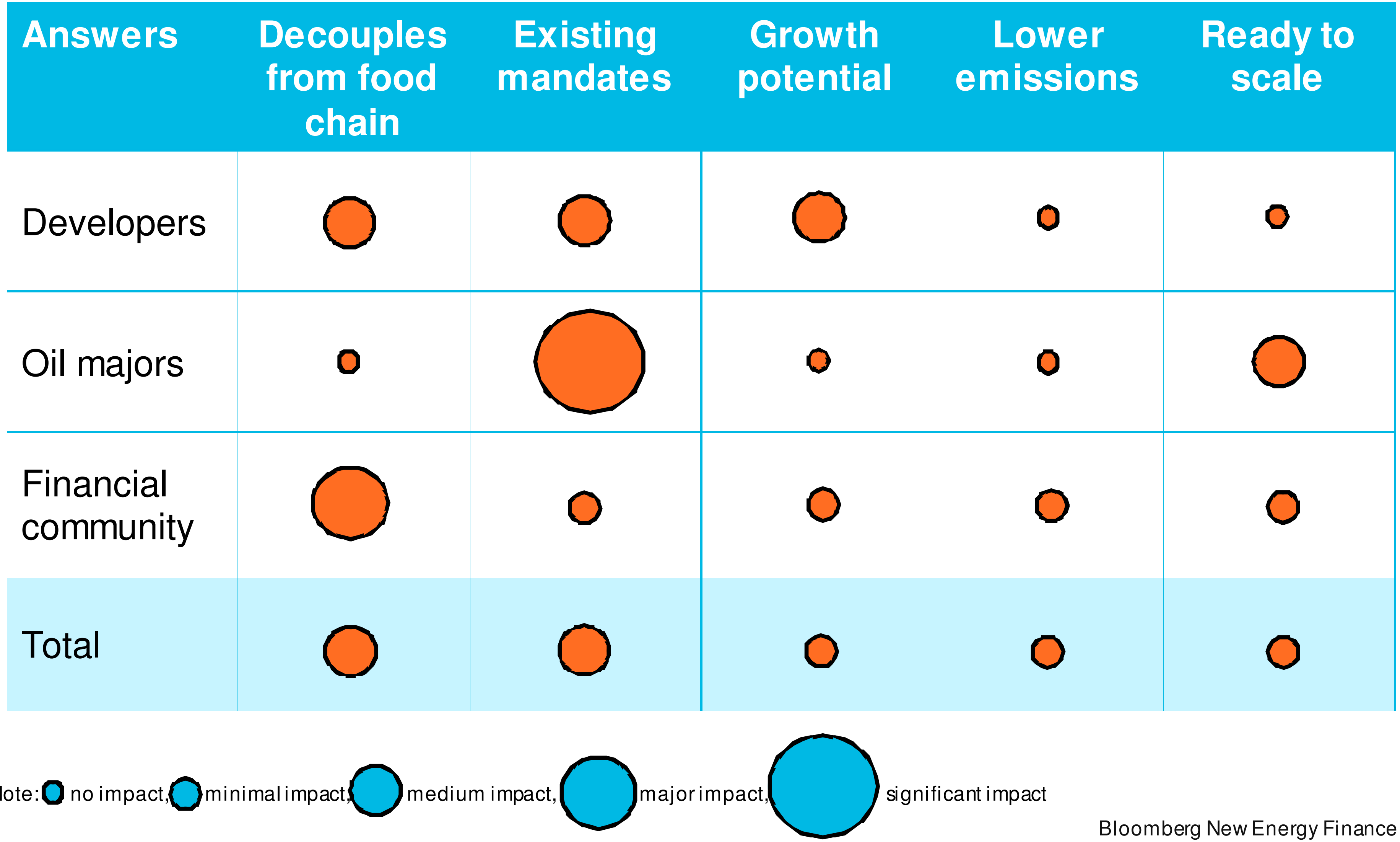
WHY IS THE NEXT-GENERATION BIOFUEL INDUSTRY ATTRACTIVE?



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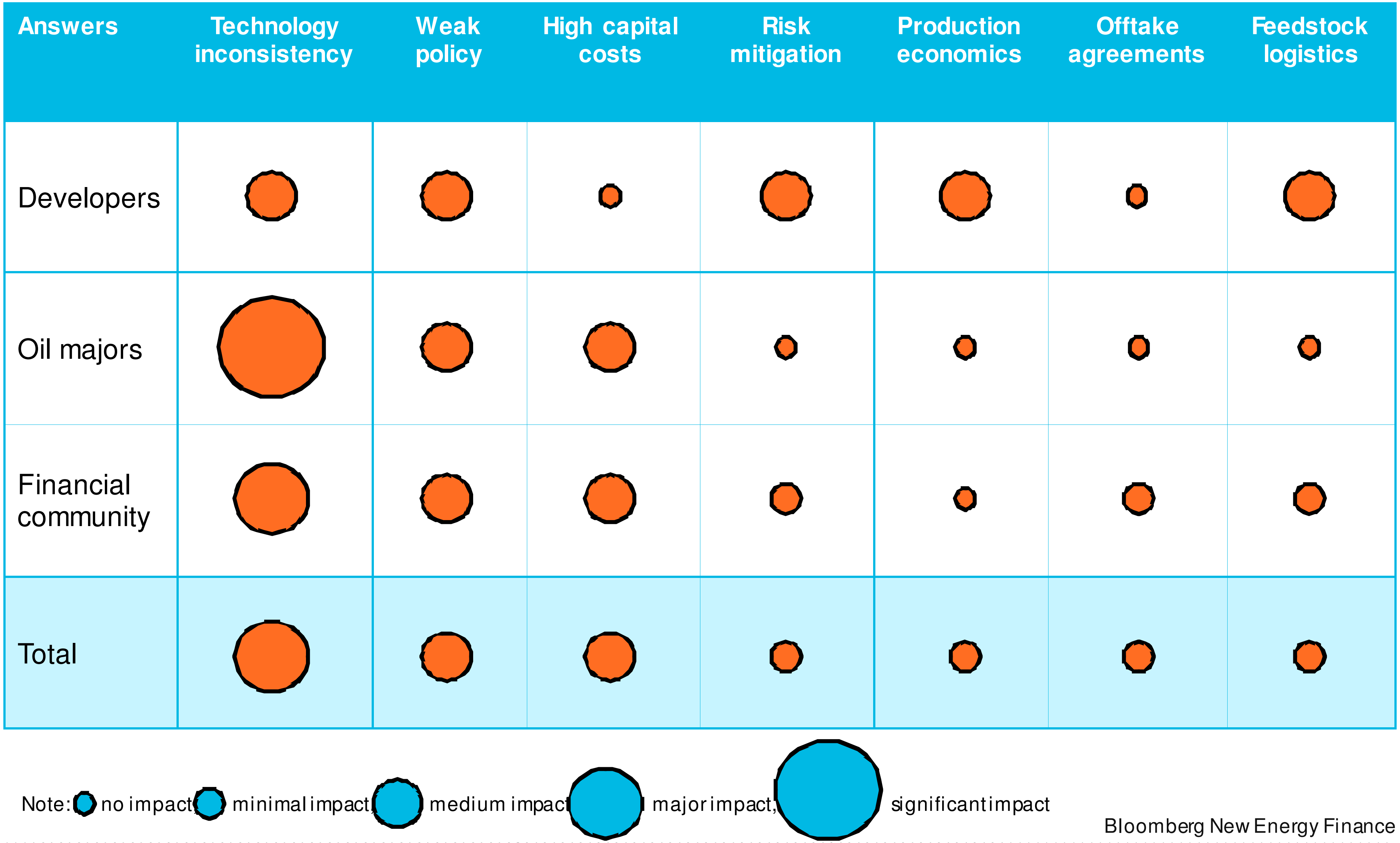
WHAT ARE THE INDUSTRY BARRIERS?



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WHAT ARE THE VALUE CHAIN DEVELOPMENTAL PRIORITIES?

Residues logistics	Commercial scale	Technical barriers
• 17%	• 50%	• 33%

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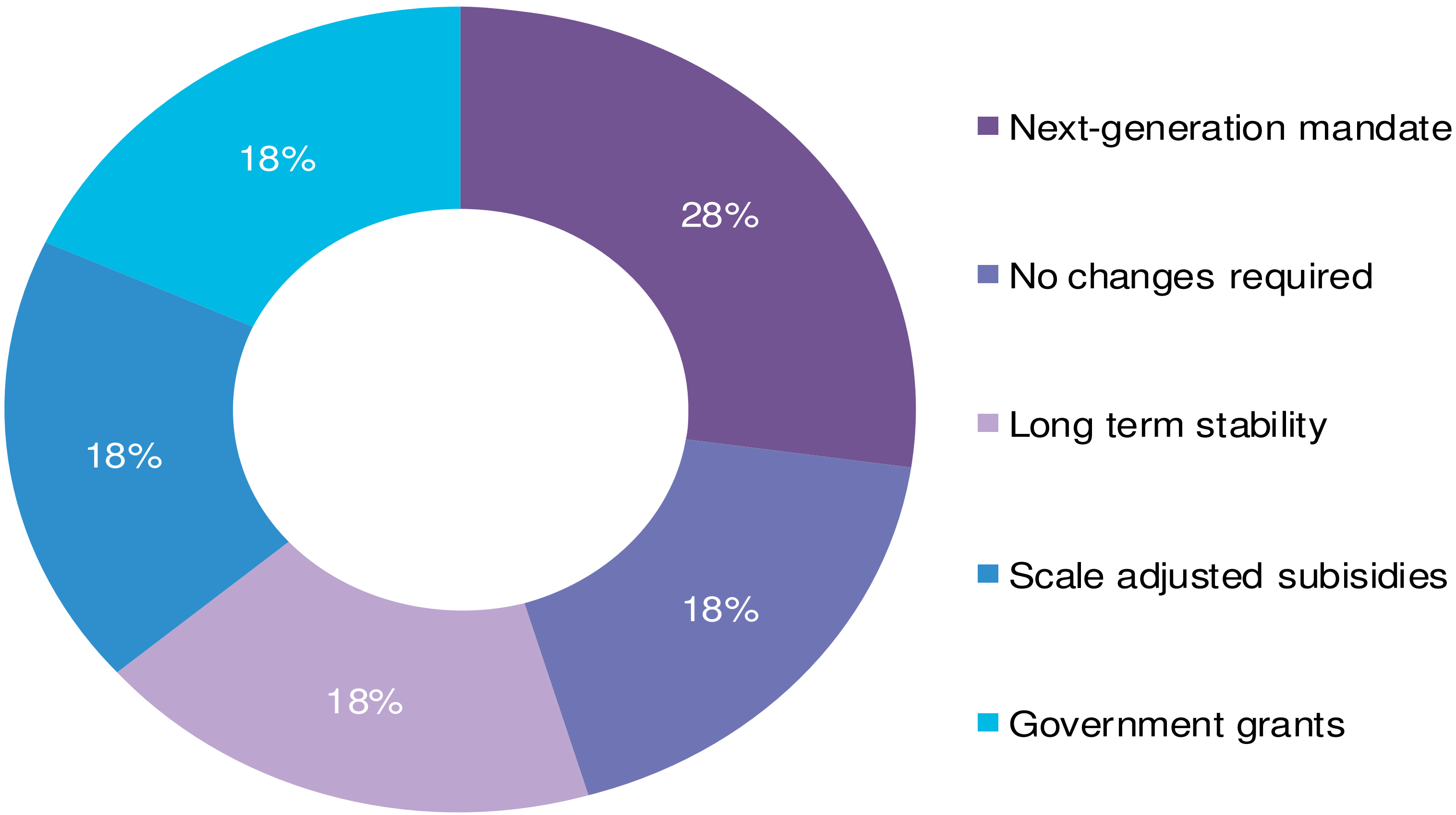
POLICY REQUIRED



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ROBERTO RODRIGUEZ,
RRODRIGUEZLA@BLOOMBERG.NET