

# Cellulosic Ethanol SUMMIT 2008

November 17-19, 2008 | The Westin Colonnade Hotel | Coral Gables, FL

## The Premier Cellulosic Ethanol Industry-Building Event!

### Summit Keynote Speakers:



**Charles H. Bronson**  
Commissioner  
FLORIDA  
DEPARTMENT OF  
AGRICULTURE  
AND CONSUMER  
SERVICES



**Edward T. Schafer**  
Secretary of  
Agriculture  
U.S. DEPARTMENT  
OF AGRICULTURE



**Jeremy L. Susac**  
Executive Director,  
Governor Crist's  
Energy Office,  
FLORIDA ENERGY  
& CLIMATE  
COMMISSION

### Supporting Organizations:



CANADIAN RENEWABLE FUELS ASSOCIATION / ASSOCIATION CANADIENNE DES CARBURANTS RENEUVABLES



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*The premier event where the rapidly evolving cellulosic ethanol industry comes together to move the industry forward.*



## About The Summit

The *Cellulosic Ethanol Summit* has established itself as the major gathering place where all the communities in the cellulosic ethanol value chain assemble each year to help advance the development of the nation's cellulosic ethanol industry. In November, leaders from the agricultural, biotech, technology, developer, oil, auto and financial communities will again gather to report on their activities, consider the next steps forward, and share their perspectives on the progress in reaching the commercial production of cellulosic ethanol.

This year the *Summit* moves from the winter chill of post-election Washington, DC to the warm, welcoming sunshine of Florida. Florida has become a leading supporter of the biofuels industry. To highlight the unique role Florida is playing, this year's *Summit* will feature two of the state's chief policy makers as Keynote Speakers: Jeremy L. Susac, Executive Director of the Florida Energy & Climate Commission, a part of Governor Crist's Energy Office and Charles H. Bronson, Commissioner of the Florida Department of Agriculture and Consumer Services.

The *Summit* provides an important opportunity for the various communities in the cellulosic ethanol value chain to come together, discuss their activities in advancing cellulosic ethanol commercialization, and report on the progress they are making in addressing the key technical, organizational, economic and financial challenges facing the industry.

Some of the themes that will be highlighted at this year's *Summit* are the impact of the food vs. fuel debate on the industry, the ramifications of the re-evaluation of the RFS mandate, and the significance of the flurry of new collaborative and strategic relationships announced over the past year.

The *Summit* provides a rich opportunity for offline discussions, where everyone has the chance to meet other groups in the value chain and to establish ongoing relationships.

## About The Pre-Summit Briefing: *Developing A Sustainable Cellulosic Ethanol Industry*

This year's *Pre-Summit Briefing* will provide an excellent opportunity for attendees to obtain a report on the developments underway to tackle the important challenge of developing a sustainable cellulosic ethanol industry. The briefing will survey the sustainability policy and regulatory landscape; report on efforts to establish sustainability principles, standards and certifications; assess the economic, environmental, and social issues that must be addressed; and evaluate where these efforts are leading and what their impacts will be on the industry.

# Summit Partners

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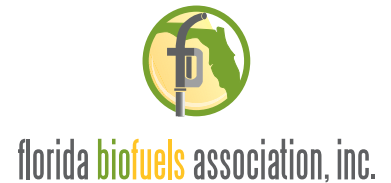
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# Summit Agenda

Tuesday, November 18, 2008



Continental Breakfast Sponsored by:



## Welcome to Florida

**Dana Weber**, Executive Director,  
FLORIDA BIOFUELS ASSOCIATION

## Introduction By The Summit Chair

**Bob Dinneen**, President & CEO, RENEWABLE FUELS ASSOCIATION



Keynote Address:

### Florida: A Leader in State Support of Cellulosic Ethanol Development

**Jeremy L. Susac**, Executive Director,  
Governor Crist's Energy Office,  
FLORIDA ENERGY & CLIMATE COMMISSION

## The Biofuels Debate: Impacts on the Industry

Triggered by world food shortages and new concerns about sustainability, a global biofuels debate has emerged which has brought about a re-evaluation of the long-term viability of biofuels as a fuel source. The panelists will discuss the implications of this debate on the burgeoning cellulosic ethanol industry.

- » What opportunities and challenges is the debate creating for the cellulosic ethanol industry in the short and long-term?
- » What will be the repercussions on the cellulosic ethanol industry of concerns about corn-based ethanol?
- » What are the legitimate issues the debate has raised that must be addressed by the industry?
- » Can the industry meet aggressive GHG goals?
- » Can feedstocks beyond corn sustainably meet the industry's supply needs?

Moderator:

**Graham Noyes**, Attorney, STOEL RIVES LLP

Panelists:

**Alison Goss Eng**, Biomass Program,  
U.S. DEPARTMENT OF ENERGY

**Nathanael Greene**, Director of Renewable Energy Policy,  
NATURAL RESOURCES DEFENSE COUNCIL

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

**Darlene Snow**, Senior Vice President, OGILVY PR

**Candace Wheeler**, Technical Fellow, Research & Development,  
GENERAL MOTORS



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## Federal Policies Driving the Future of Biofuels

The Renewable Fuels Standard (RFS) is a critical component in the development of the cellulosic ethanol industry. The biofuels debate has touched off a reconsideration of the mandate in Congress and created a climate of uncertainty about the mandate itself. Further, the decisions of the EPA with respect to their responsibility of determining lifecycle assessment of all new biofuels may have a significant impact on the ability to produce these fuels. The panelists will address questions relating to the RFS program and the federal policies driving the future of biofuels.

- » Will the current RFS mandate remain intact? If not, what will the revised mandate be?
- » What challenges does the mandate pose for the industry?
- » What is the status of the EPA rulemaking? How important is carbon reduction as the criteria for energy policy?
- » What is the future of tax incentives, particularly the ethanol incentive, scheduled to expire in 2010?

Moderator:

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

Panelists:

**Paul N. Argyropoulos**, Senior Policy Advisor,  
Office of Transportation & Air Quality,  
ENVIRONMENTAL PROTECTION AGENCY

**Bob Dinneen**, President & CEO, RENEWABLE FUELS ASSOCIATION

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

**Brent Erickson**, Executive Vice President, Industrial & Environmental  
Section, BIOTECHNOLOGY INDUSTRY ORGANIZATION

## Feedstock Supply Lines: A Progress Report

The panelists will provide an update on the progress in establishing reliable supply lines of dedicated fuel crops, crop residues, woody biomass and municipal and other waste streams. They will discuss how the recent dialogue on the sustainability of feedstocks is impacting the plans of feedstock providers. The panelists will discuss how they are organizing to meet the industry's needs and the business factors that are guiding their decision-making.

- » What uncertainties need to be addressed or challenges overcome to ensure sustainable feedstock supply lines?
- » What are feedstock suppliers currently doing to tackle these uncertainties and challenges?
- » How will this affect the business models and prices that will be needed to attract feedstock supplier support of the cellulosic ethanol industry?
- » How will this affect the type of relationships they will want to establish with biorefiners?

Moderator:

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

Panelists:

**Timothy M. Baye**, Director, LAFAYETTE BIOAG &  
Professor of Business Development,  
UNIVERSITY OF WISCONSIN EXTENSION

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

**Olaf Roed**, President & CEO, GREEN CIRCLE BIO ENERGY, INC.

**Necy Sumait**, Senior Vice President/Director,  
BLUEFIRE ETHANOL, INC.



## Luncheon Address

**Charles H. Bronson**, *Commissioner*,  
FLORIDA DEPARTMENT OF AGRICULTURE  
AND CONSUMER SERVICES

## Non-Enzymatic Biorefinery Developer Briefing

This panel of non-enzymatic biorefinery developers will report on the current status of their development activities as well as the insights and knowledge they have gathered along the way.

- » What non-enzymatic projects are under development?
- » Where do they stand in the development process?
- » What are the key development challenges for these projects and how are they being addressed?
- » What important lessons are being learned?
- » Where do you need to reach out to other industry players in order to successfully move these projects forward?

Panelists:

**Vincent Chornet**, *President & CEO*, ENERKEM  
**Arnold Klann**, *Chairman/President/CEO*, BLUEFIRE ETHANOL, INC.  
**Donald Pierce**, *President*, *Advanced Biofuels Group*,  
 GREENFIELD ETHANOL, INC.  
**Ben Thorp**, *President*, FLAMBEAU RIVER BIOREFINERY



Networking Break Sponsored by:



## Biochemical Biorefinery Developer Briefing

This panel of biochemical biorefinery developers will report on the progress of their development activities and the insights and knowledge they are gathering along the way.

- » What biochemical projects are under development?
- » Where do they stand in the development process?
- » What are the key development challenges for biochemical projects and how are they being addressed?
- » What important lessons are being learned?
- » Where do you need to reach out to other industry players in order to successfully move these projects forward?

Moderator:

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

Panelists:

**John Howe**, *Vice President, Public Affairs*, VERENIUM  
**Ross MacLachlan**, *President & CEO*, LIGNOL  
**Jeff Passmore**, *Executive Vice President*, IOGEN CORPORATION  
**Gerson Santos-Leon**, *Director*,  
 ABENGOA BIOENERGY NEW TECHNOLOGIES  
**Dr. Mark Stowers**, *Vice President, Research & Development*, POET

## The Industrial Biotech Community: Creating Collaborations for Commercialization

One of the requirements for moving the cellulosic biofuels industry forward is to establish closer working relationships between technology providers, the chemical engineering community and even oil companies. Over the past year there have been some notable steps forward in this direction. The panel will discuss the progress being made in creating collaborations for commercialization and the impact they will have on large-scale cellulosic biofuels development.

- » What are the recent commercial advances and announcements related to cellulosic biofuels?
- » What are the goals of recently announced collaborations?
- » What do these collaborations say about industry maturation?
- » How will collaboration advance the commercialization process?
- » What will their implications be for other players in the industry?

Moderator:

**Brent Erickson**, *Executive Vice President, Industrial & Environmental Section*,  
BIOTECHNOLOGY INDUSTRY ORGANIZATION

Panelists:

**Wesley J. Bolsen**, *Chief Marketing Officer, VP of Business Development*, COSKATA, INC.  
**Vonnie L. Estes**, *New Ventures Development Manager, Biofuels*, DUPONT DANISCO  
**Emmanuel Petiot**, *Global Business Development Manager*, NOVOZYMES  
**David A. Glassner, Ph.D.**, *Vice President, Bioprocessing & Engineering*, GEVO



Summit Reception Sponsored by:



## What Participants Said About Infocast's 2007 Cellulosic Ethanol Summit:

“ This is truly a Summit where facts and information are shared openly by all levels of organizations: from CEO's to the Secretary of Agriculture to U.S. Representatives to engineers!”

—James Stanley, *Business Development Specialist*, Emerson Process Management

“ The Summit brought together the innovators of this developing industry!”

—Dana Peterson, *Producer Policy Specialist*, Kansas Wheat

“ An amazing collection of presenters under one roof! It is rare to have high level officials from so many companies sharing their views with the audience.”

—Sumesh Aurora, *Director of Strategic Biomass Initiative*, Mississippi Technology Alliance

# Summit Agenda Continued

Wednesday, November 19, 2008



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## Keynote Address

**Edward T. Schafer**, *Secretary of Agriculture*,  
U.S. DEPARTMENT OF AGRICULTURE (invited)

## Commercialization & Financing Industry Growth

The emerging cellulosic ethanol industry has been greeted by a flurry of investment and strategic partnership announcements during the course of the year. The panelists will explore the dynamics underlying these developments, discuss the strategic and investment drivers of both the financial community and strategic players, and evaluate the merits of the alternative commercialization strategies.

- » Has there been a shift in financial and strategic investors' perspectives on cellulosic ethanol?
- » What level of investment is likely to flow to the industry in the next 2 to 5 years?
- » What type of investors will be involved in this flow?
- » When will project financing be available and on what terms?
- » What conditions are investors looking for before they are ready to pull the trigger on a cellulosic investment?
- » What commercialization strategies do investors believe will find success in the marketplace?

Moderator:

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

Panelists:

**Brian Bolster**, *Vice President*, GOLDMAN SACHS & CO.

**Denny DeVoss**, *Corporate Finance Director*, POET

**Paul Ho**, *Principal*, HUDSON CLEAN ENERGY PARTNERS

**Guy Ouimet, P. Eng. MBA**, *Senior Advisor*,

SUSTAINABLE DEVELOPMENT TECHNOLOGY CANADA'S  
NEXT GENERATION BIOFUELS FUND

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



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## The Blend Wall: Strategies and Solutions

The RFS calls for future supplies of renewable fuels that cannot be absorbed by today's automobiles—creating a "blend wall." The panelists will explore potential strategies and solutions to address this barrier. They will discuss how the industry is working to determine which blend levels will prevail in the market and what supply of new automobiles will be needed in the marketplace.

- » How can the industry organize to address the blend wall?
- » What are the factors in the evaluation of E85 or higher blend levels?
- » How will the industry lock into a blend level?
- » What are automakers' plans to support these blend levels?
- » Are automakers' plans being affected by new public demand for fuel-efficient vehicles?
- » Will government mandates on automakers be required?
- » What is a realistic timeline for determining a market standard?

Moderator:

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

Panelists:

**Patrick Bolton**, *Senior Project Manager*, NEW YORK STATE ENERGY  
RESEARCH & DEVELOPMENT AUTHORITY (invited)

**Burl Haigwood**, *President*,  
FLEXIBLE FUEL VEHICLE CLUB OF AMERICA

**Ken Klemmie**, *Acting Director*,  
INDIANA STATE DEPARTMENT OF AGRICULTURE

**Curt Magleby**, *Director*, U.S. State & Local Government Relations,  
FORD MOTOR COMPANY

**Dr. Michael Warren**, *National Manager*,  
TOYOTA MOTOR NORTH AMERICA, INC.



Summit Adjourns

## Help Build the New Bio-based Economy

**Sustainable Development Technology Canada  
is looking for demonstrated cellulosic ethanol  
and next-generation biodiesel technologies.**

The \$500 million NextGen Biofuels Fund supports the establishment of first-of-kind commercial scale demonstration facilities for the production of next-generation renewable fuels.

**SDTC is Accepting Applications for Funding**



**NextGen Biofuels Fund™**

SUSTAINABLE DEVELOPMENT  
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To find out more, email us at [nextgenapplications@sdtc.ca](mailto:nextgenapplications@sdtc.ca)  
or visit the Funding section at [www.sdtc.ca](http://www.sdtc.ca)

## Developing A Sustainable Cellulosic Industry

The sustainability of the biofuels industry has recently moved front and center as a pressing issue requiring immediate industry attention. The *Briefing* will provide attendees with the most current information about the developments underway to tackle this important challenge. The goal is to provide the practical information for all players who have a stake in the emerging cellulosic industry with the kind of knowledge that will facilitate their future planning and decision-making. The *Briefing* will:

- Report on the current sustainability policy and regulatory landscape
- Explore the efforts underway to develop sustainability principles, standards and certifications
- Evaluate where these efforts are leading and what their impacts will be on the industry
- Provide an assessment of the economic, environmental, and social issues that must be addressed for fuel crops and crop residues, grown wood and wood waste, and municipal waste

### Briefing Agenda



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#### Introduction by the Briefing Chairmen

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

#### Keynote Panel

#### Sustainability: Defining Its Importance, Goals & The Path Forward

Moderator:  
**Neal Gutterson**, *President & CEO*, MENDEL BIOTECHNOLOGY

Panelists:  
**John Howe**, *Vice President, Public Affairs*, VERENIUM  
**Jimmie Powell**, *Senior Policy Advisor*, THE NATURE CONSERVANCY  
**Ernest C. Shea**, *Project Coordinator*, 25X25

#### Current Policies & Regulation On Sustainability

#### The RFS and EPA Rule Making

**Paul N. Argyropoulos**, *Senior Policy Advisor, Office of Transportation & Air Quality*, ENVIRONMENTAL PROTECTION AGENCY (Invited)

#### USDA Policies & Regulations

**Roger Conway**, *Director of the Office of Energy Policy & New Uses*, U.S. DEPARTMENT OF AGRICULTURE

#### Developing Sustainability Principles, Standards & Certifications

#### The Council for Sustainable Biomass Production Program

**Barbara Stinson**, *Staff Director*, THE COUNCIL FOR SUSTAINABLE BIOMASS PRODUCTION

#### The Roundtable on Sustainable Biofuels Program

**Barbara Bramble**, *Senior Program Advisor*, NATIONAL WILDLIFE FEDERATION

#### The DOE Biomass Program

**Alison Goss Eng**, *Biomass Program*, DEPARTMENT OF ENERGY

#### Economic, Environmental & Social Assessments

##### Dedicated Energy Crop Sustainability (Track #1)

Lead Presenter:  
**Neal Gutterson**, *President & CEO*, MENDEL BIOTECHNOLOGY

Presenters:  
**David Bransby**, *Professor, Energy Crops and Bioenergy*, COLLEGE OF AGRICULTURE, AUBURN UNIVERSITY  
**Steve A. Flick**, *President*, SHOW ME ENERGY COOPERATIVE

##### Municipal Waste Sustainability (Track #2)

Lead Presenter:  
**Dr. Don J. Stevens**, *Senior Program Manager for Biomass*, PACIFIC NORTHWEST REGIONAL LABS

Presenters:  
**Donna Perla**, *Senior Advisor*, ENVIRONMENTAL PROTECTION AGENCY  
**Necy Sumait**, *Senior Vice President/Director*, BLUEFIRE ETHANOL, INC.

##### Crop Residue Sustainability (Track #1)

Lead Presenter:  
**Jim Hettenhaus**, *President & CEO*, CEA, INC.

Presenters:  
**Doug Karlen**, *Research Leader-Soil & Water Quality*, USDA-ARS  
**John M. Kimble**, *Soil Scientist*, INNOVATIVE SOIL SOLUTIONS

##### Grown Wood/Wood Waste Sustainability (Track #2)

Lead Presenter:  
**Robert J. Olszewski**, *Vice President Environmental Affairs*, PLUM CREEK TIMBER COMPANY

Presenters:  
**Marilyn A. Buford**, *National Program Leader for Silviculture Research*, USDA FOREST SERVICE  
**Dick Carmical**, *President*, THE PRICE COMPANIES, INC.

#### Value Chain Members: Planning, Decision-Making & Investments

##### Implications Of Sustainability For Industry Players

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

Panelists:  
**Jim Hettenhaus**, *President & CEO*, CEA, INC.  
**Robert Olszewski**, *Vice President, Environmental Affairs*, PLUM CREEK TIMBER COMPANY  
**Anna Rath**, *Vice President of Commercial Development*, CERES

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Tuition	Standard	Govt./Member of Supporting Orgs.
Cellulosic Ethanol Summit (November 18-19, 2008)	\$995.00	\$625.00
Pre-Summit Briefing (November 17, 2008)	\$650.00	\$425.00

### Discounts:

Government Employees and Members of Supporting Organizations (see above).  
Team Discount for teams of three or more from the same organization, the third and subsequent registrants qualify for a 50% discount off the Standard Tuition rate.  
Please note: Discounts are subject to verification and approval. No discounts can be combined.

### Venue/Hotel Accommodations:

Infocast has secured a limited number of rooms at the Westin Colonnade Hotel in Coral Gables, Florida, at the special rate of \$189/night until October 24, 2008. To receive the special rate, call the hotel directly at 305-441-2600 and mention that you are an Infocast/Cellulosic Ethanol Summit registrant. The hotel is located at 180 Aragon Avenue • Coral Gables, FL 33134 and is located mere minutes from the Miami International Airport. Please visit the event website at <http://www.infocastinc.com/cell08> for additional information.

### Continuing Education Credits:

Infocast certifies that this activity has been approved for Continuing Education credit by the State of California in the amount of 9.5 hours for the Summit and an additional 6.5 hours for the Pre-Summit Briefing. Continuing Education credit hours are subject to change.

### Cancellation, Refunds & Credits:

Should you be unable to attend, a refund, less a \$195 administrative charge, will be made for cancellations received via letter or fax at least 10 working days before the event. We will be pleased to transfer your registration to another member of your company, or credit the registration fee to another Infocast conference if you register within 6 months from the date of this conference. In the event the conference is cancelled, Infocast's liability is limited to the refund of the conference registration fee only.

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## Registration Form

### The Cellulosic Ethanol Summit

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Please check one or more of the following:

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Tuition	Standard	Govt./Member of Supporting Orgs.	
Cellulosic Ethanol Summit (November 18-19, 2008)	\$995.00	\$625.00	
Pre-Summit Briefing (November 17, 2008)	\$650.00	\$425.00	
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