

Brazil's biofuels scenario:

What are the main drivers which will shape investments in the long term?

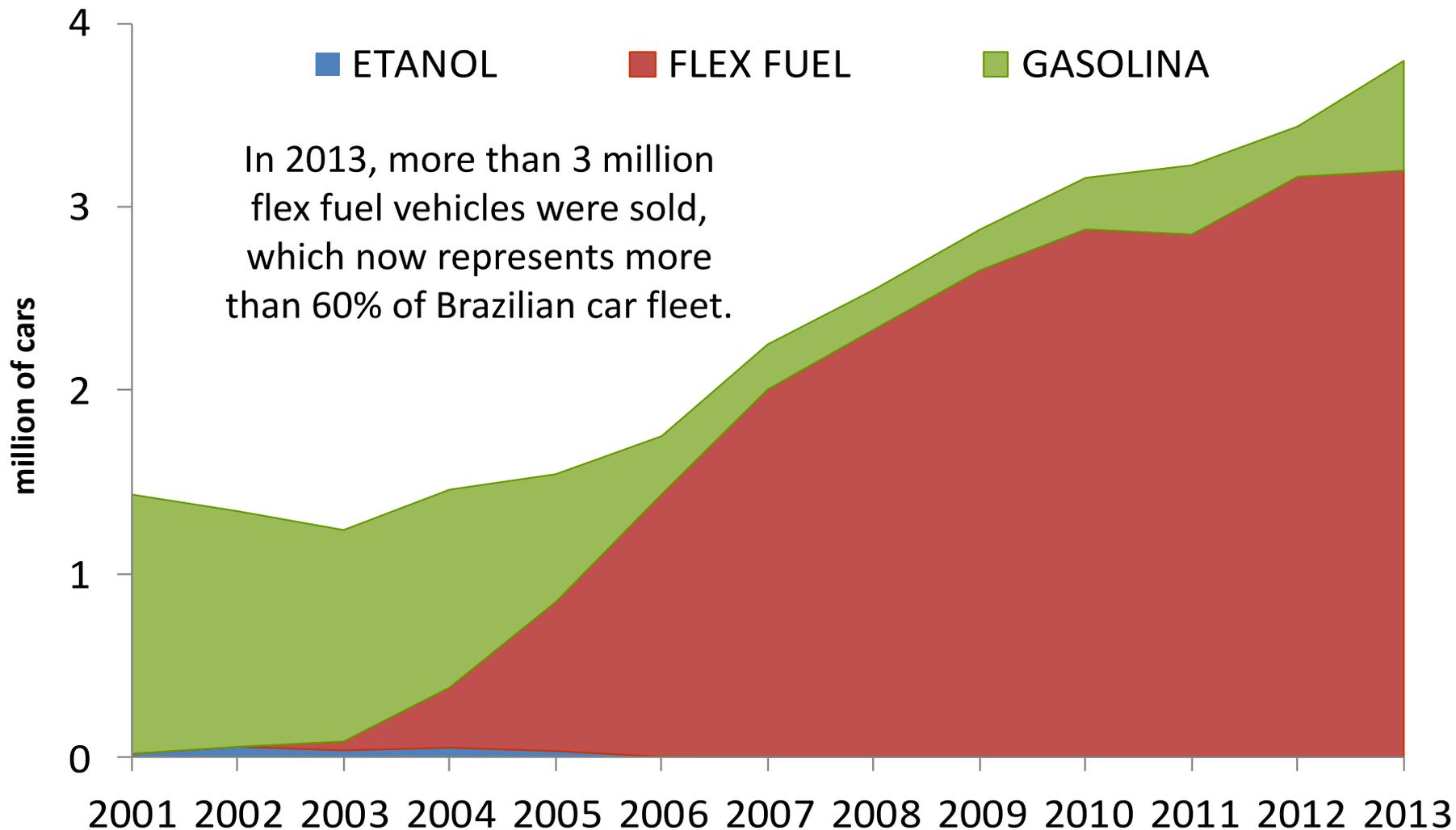
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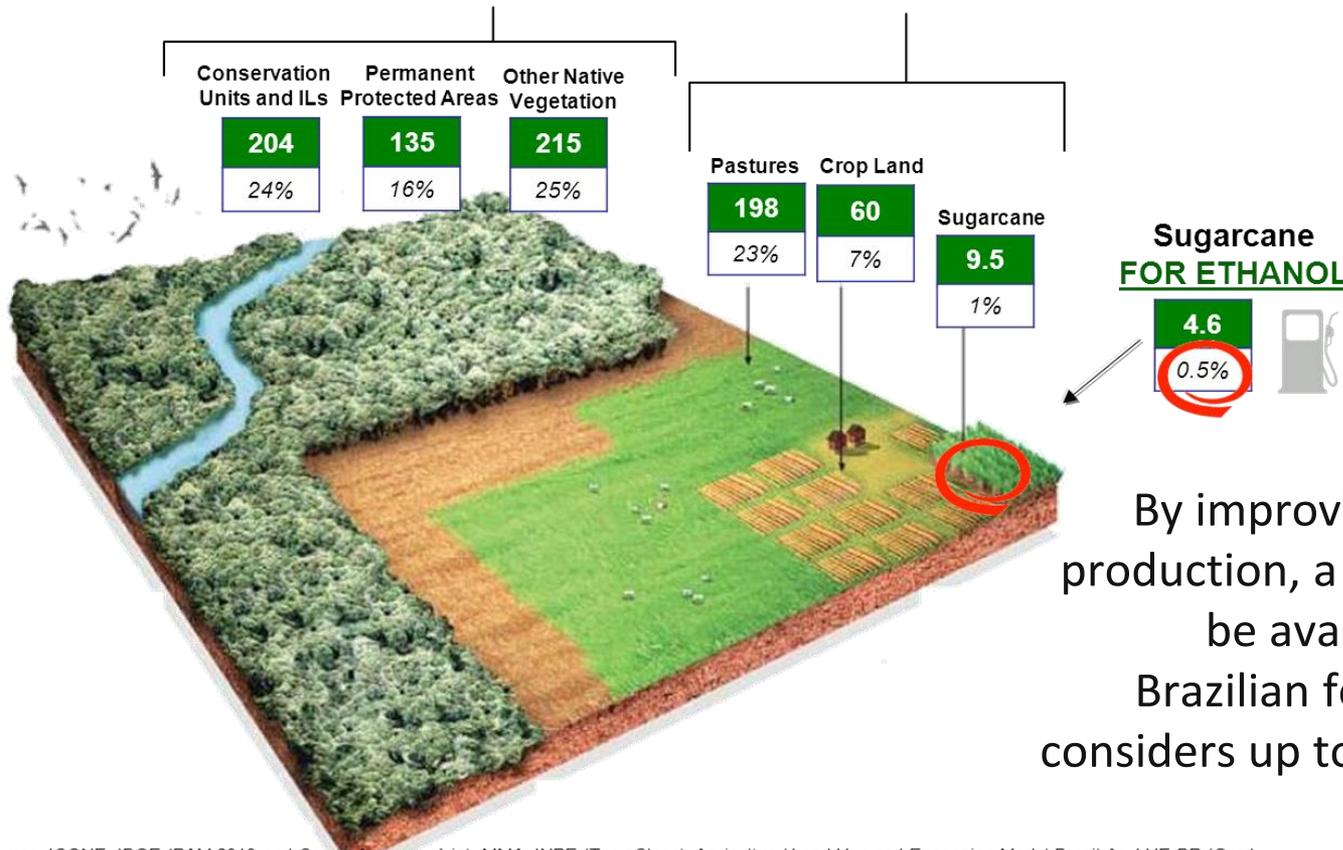
Growing fuel market



Land availability

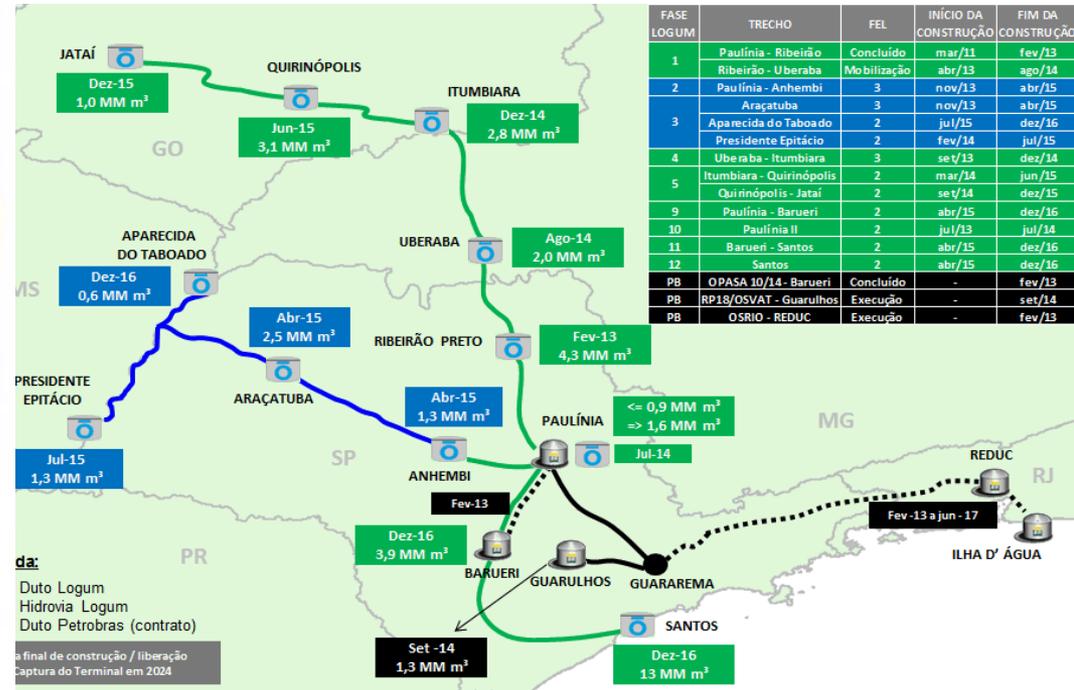
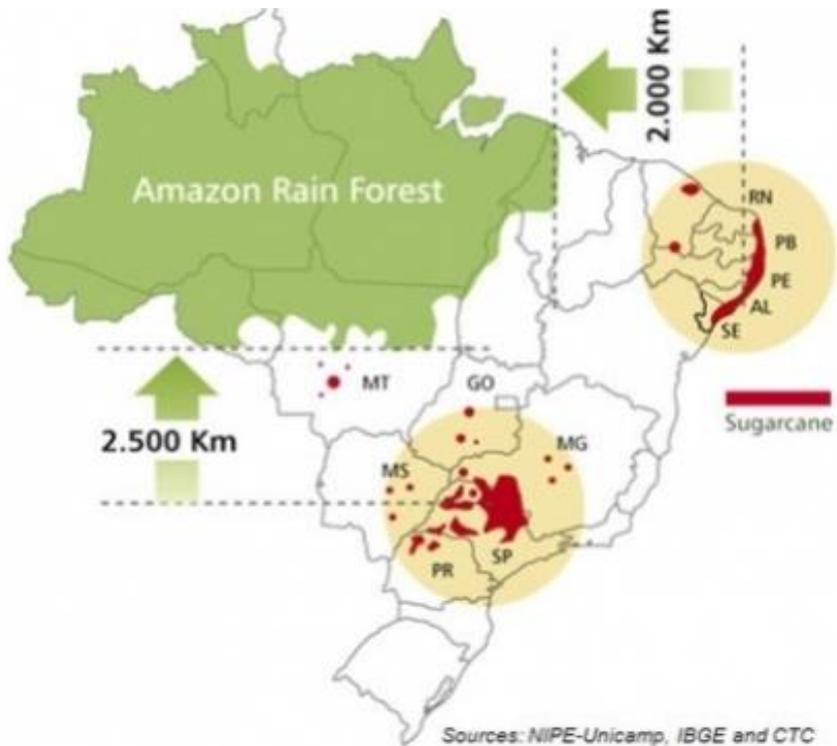
Million Hectares

Total Area	Native Vegetation	Land in Actual Use	Other Uses
851	554	258	38
100%	65%	30%	5%



By improving the low yield of cattle production, a large amount of land will be available for other purposes. Brazilian federal agricultural zoning considers up to 64 Mha able to produce sugarcane w/o irrigation.

New infrastructure coming up



Around US\$ 3.5 billion has been invested in a 1,333 km pipeline (green line), dedicated only for ethanol, which links producing to exporting/consuming regions. The first stretch has been operational since the end of 2013.

Two large scale plants of **2nd generation ethanol** will be operational by the end of 2014

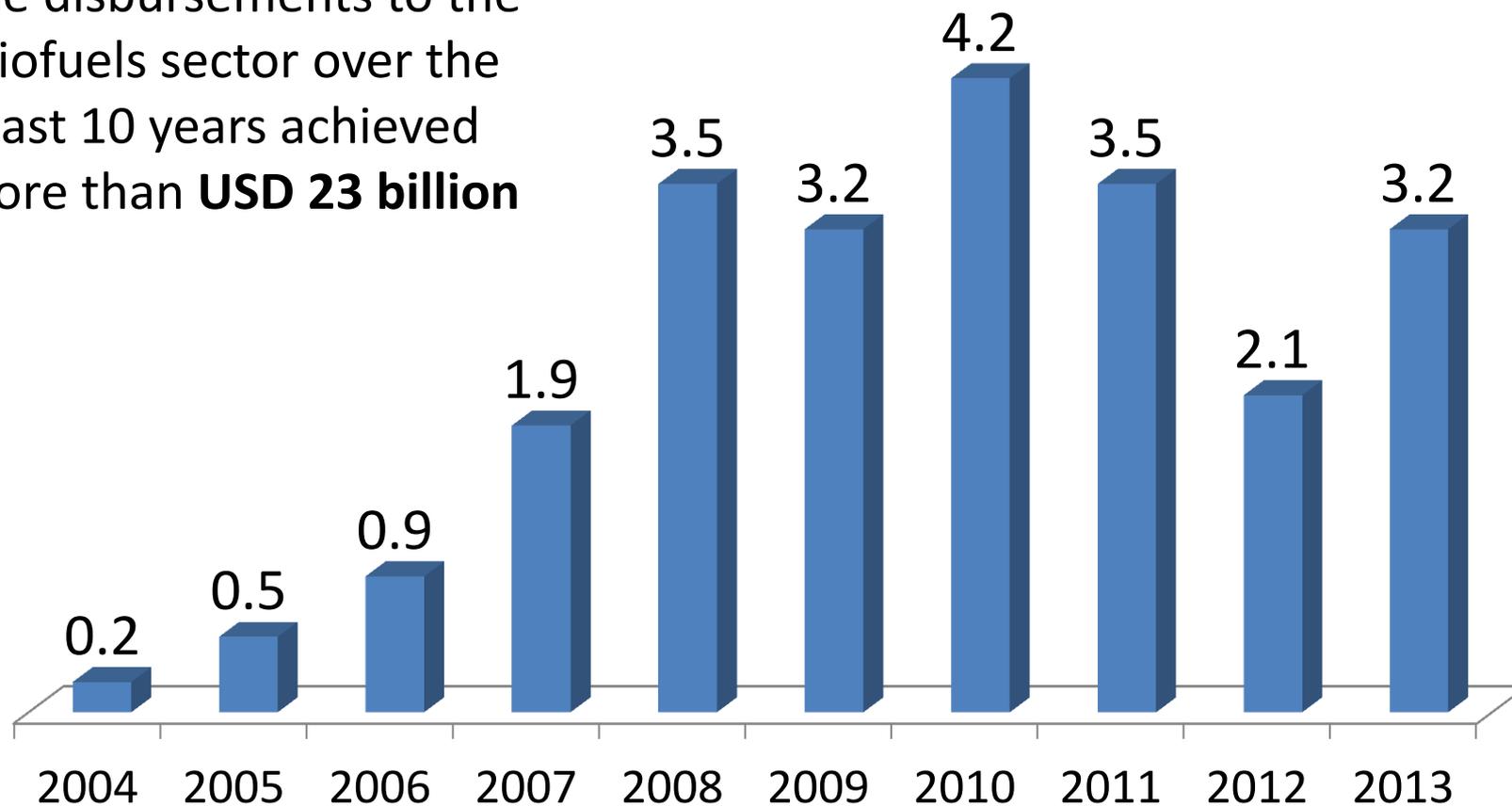


Two large scale **biorefineries** are now producing high value chemicals and drop-in fuels



US\$ billion

The disbursements to the biofuels sector over the last 10 years achieved more than **USD 23 billion**



Thank You For Your Attention!

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