Growing the global market for the world’s most sustainable fuels
New International Organizations are working to grow the Global Bioeconomy

Better policies and R&D can facilitate supply, **BUT**

- How to grow robust demand not dependent on government mandates?
- How to truly unleash market forces to drive innovation?

International Technical Agencies

- Sustainable Energy For All
- Global Bioenergy Partnership (GBEP)
- International Renewable Energy Agency (IRENA)

Govt-to-Govt Dialog

Trade Groups

National Government

Enforced Biofuel Mandate

Biofuel Demand

Public Support

Oil Companies & NGOs

International Technical Agencies

- Mission Innovation
- IEA Bioenergy
- RFA
- ePURE

BUT

- How to grow robust demand not dependent on government mandates?
- How to truly unleash market forces to drive innovation?
below50 – Growing the Global Market for the World’s Most Sustainable Fuels

PUBLIC

PRIVATE

MARKETS

INVESTMENT

below50 fuels

Less than ½ CO2 emissions of fossil fuels

novozymes
SkyNRG
Lanzatech

United

UPS

LCTPi

below50

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below50 – Enabling the uptake of Low Carbon Fuels

• Convert the global momentum on climate action into national level policies, i.e. link Low Carbon Fuels to the NDCs

• Create cross-sectoral B2B opportunities in new & mature markets throughout the supply chain

• Host regional dialogues in key markets to engage with investors and financiers to address investment barriers

• Create demand for below50 fuels by recruiting corporate fuel buyers
below50 – Connecting the entire value

Annual Volume procured
100 Million litres of below50 fuels

Annual Production capacity of
120 Million litres of below50 fuels

Total Investment
USD 180 Million

Jobs (Direct and Indirect)
5000

below50 – all
feedstock
producers
fleet operators
consumers
technology
finance
governments

UNITED

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## below50 – Connecting the entire value

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Action</th>
<th>Commitment (sign-up)</th>
<th>Commitment (approved)</th>
<th>Enablers</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Feedstock</td>
<td>Supply</td>
<td>Demand</td>
<td>Enablers</td>
</tr>
<tr>
<td></td>
<td>Producers</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>Fleet Operators</td>
<td></td>
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<tr>
<td></td>
<td>Investors</td>
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<td></td>
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<td></td>
<td>Governments</td>
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### Sectoral Commitment
- **October 2016**

#### Governments
- Commitment to increasing its use of below50 fuels as a percentage of total fuel use by 2020.¹
- Commitment to actively research and develop technology for below50 fuels (R&D)
- Commitment to maximising the investment in below50 fuels across relevant operations

#### Feedstock Producers
- Commitment to 12 Sustainability Principles
  - Minimum output capacity/revenue

#### Fleet Operators
- Commitment to increasing its use of below50 fuels as a percentage of total fuel use by 2020.¹
- Commitment to minimize emissions from business travel and/or logistics by preferring services that use low carbon fuels

#### Customers
- Commitment to increasing its use of below50 fuels as a percentage of total fuel use by 2020.¹
- Commitment to actively research and develop technology for below50 fuels (R&D)

#### Technology Investors
- Commitment to increasing its use of below50 fuels as a percentage of total fuel use by 2020.¹
- Commitment to actively research and develop technology for below50 fuels (R&D)

#### Supply Demand Enablers
- Commitment to increasing its use of below50 fuels as a percentage of total fuel use by 2020.¹
- Commitment to actively research and develop technology for below50 fuels (R&D)

### Action
- 3rd party assurance of the 12 Sustainability Principles
  - GHG inc/ ILUC
- 3rd party assurance of the 12 Sustainability Principles ²

### Commitment to
- 12 Sustainability Principles
- Commitment to below50 fuels

### Disclosure of volumes are preferred for airline fleet operators. The target should be reviewed when appropriate

### RSB certification or equivalent – case by case analysis

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¹ Disclosure of volumes are preferred for airline fleet operators. The target should be reviewed when appropriate

² RSB certification or equivalent – case by case analysis

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below50 – Leveraging business climate commitments to drive below50 fuel demand

RE100 is pushing corporate uptake of renewable electricity.

Likewise, below50 will drive corporate uptake of below50 fuels.

Introduction

We Mean Business is a coalition of organizations working with thousands of the world’s most influential businesses and investors.

Below50 & WeMeanBusiness

Since December 2016, below50 is part of the WMB corporate engagement. Meaning that the 7 organisations will support below50 in terms of recruitment and amplifying our work program. During 2017 we will explore opportunities of this coalition.

Impact & Opportunities

- Global Visibility
- Accountability
- Communications & profiling
- High-profile Events
- Member recruitment
- Potential Financial support

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The World Business Council for Sustainable Development (WBCSD) is a CEO-led organization of forward-thinking companies that galvanizes the global business community to create a sustainable future for business, society and the environment.

- **200** Global member companies
- **$9tn** Aggregate revenue of members
- **19m** Employees in WBCSD member companies
- **67** Countries Global Network partners

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below50 will recruit WBCSD members to commit using below50 fuels
The companies listed above are committed to accelerating the transition to sustainable, low-carbon fuel and related technologies. Specifically, buyers and shippers who support the Principles intend to:

- Signal the magnitude of business demand for more sustainable, low-carbon fuels for freight
- Clearly articulate criteria necessary to accelerate uptake of these fuels by buyers
- Encourage value chain engagement to boost collaboration and pilot new fuel investments
below50 – National engagement to accelerate market growth

- Establishing regional and national hubs
- Efforts to create demand will take into account national context

below50 Australia is working with QRFA and QLD Government to recruit buyers from the mining, construction, freight and shipping sectors.
Direct Corporate purchasing of below50 fuels can

1) Drive demand that can drive investment &
2) Improve consumer perception of below50 fuels.
How do we bring the Global South into the Global Bioeconomy?

Increasing ag yields will boost biomass and starch production

*Ratio of Actual to Potential Yield for Maize (Year 2000)*

Source: Global Agro-Ecological Zones
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