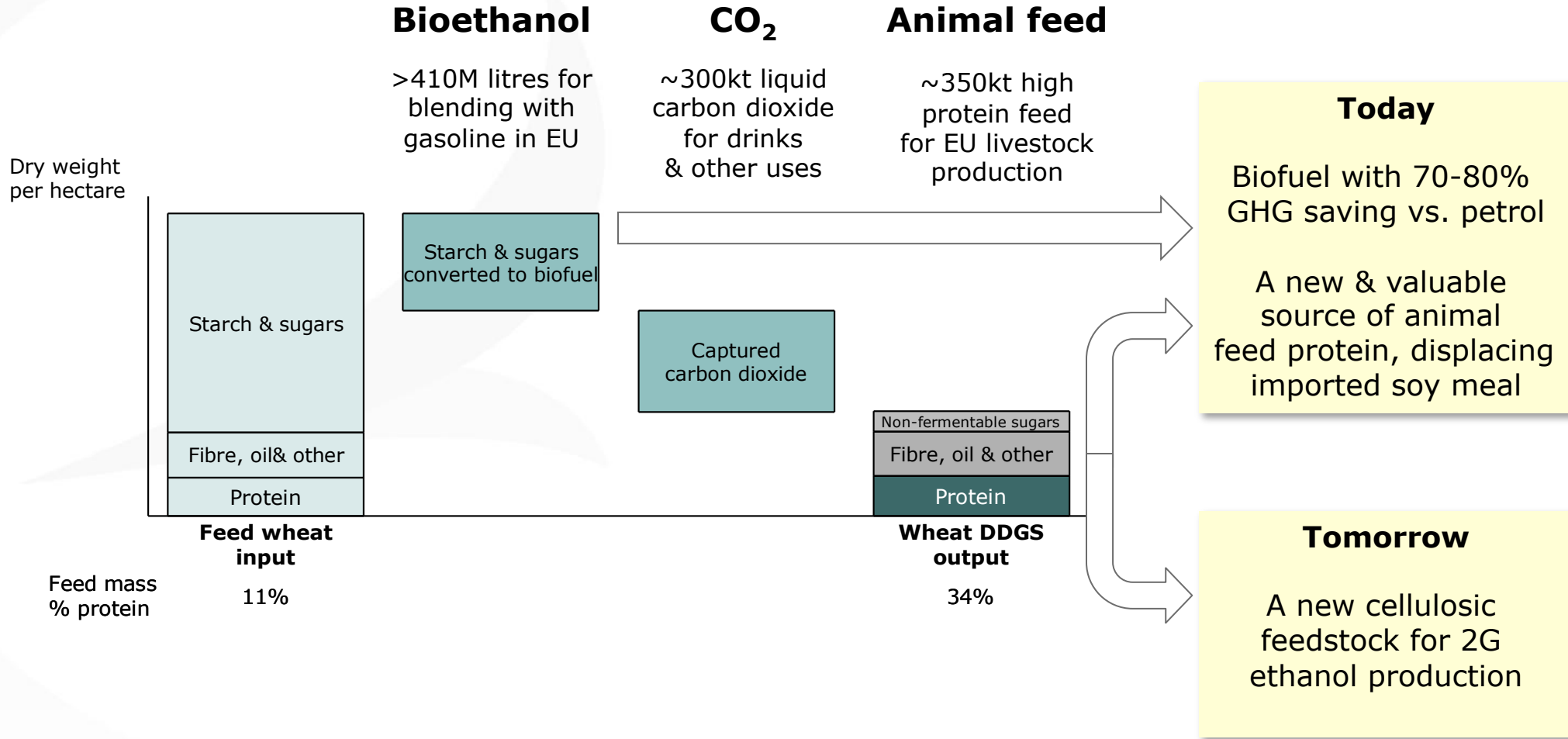




# Future prospects for biofuels

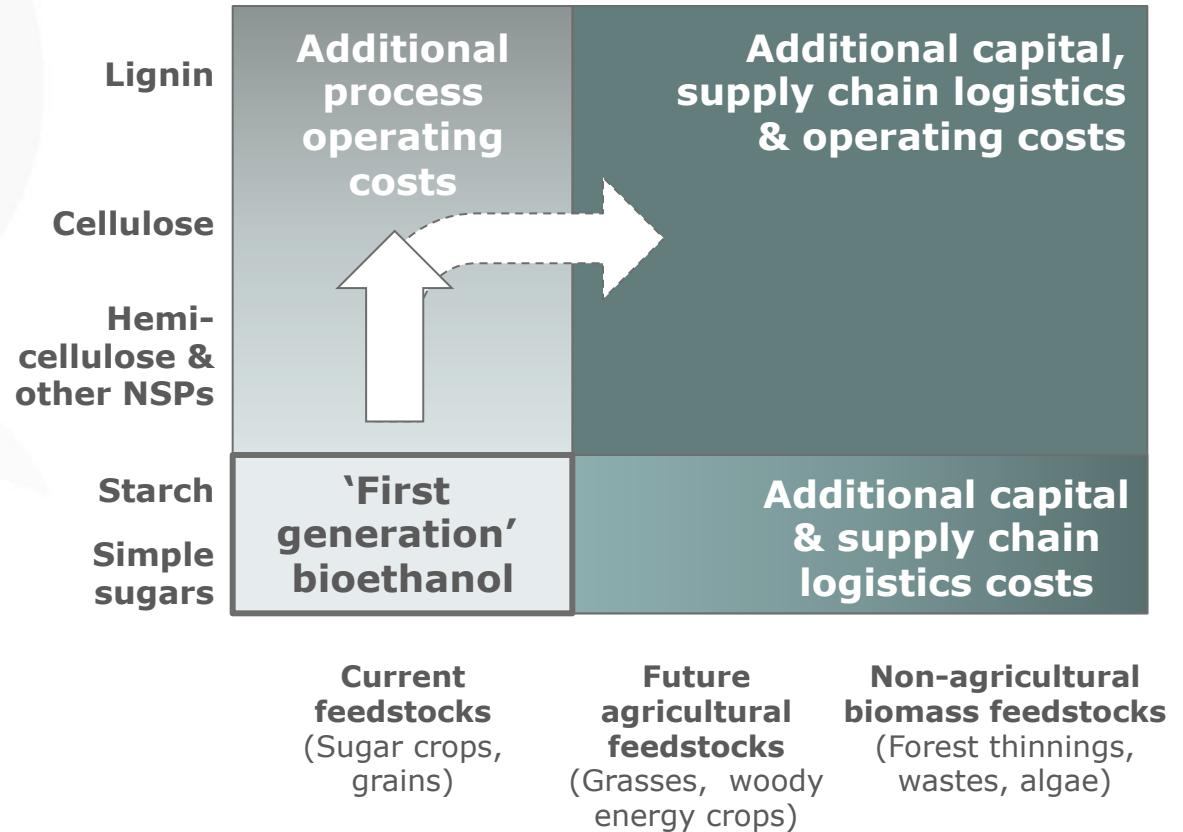
November 2012

# Ensus biorefines wheat to produce high protein animal feed and 70-80% GHG saving biofuel

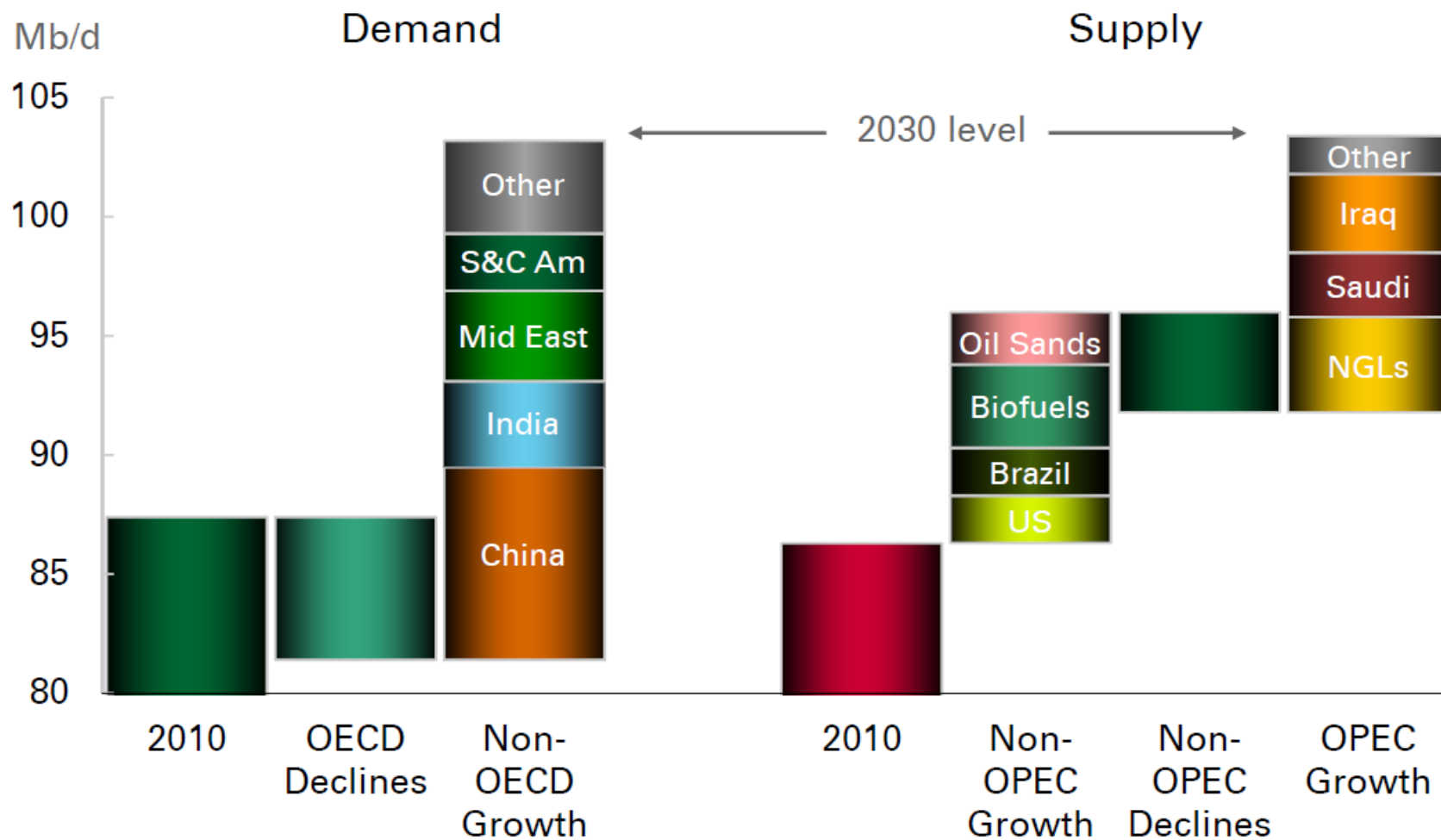


# 'First generation' bioethanol industry is an enabler for second generation technologies

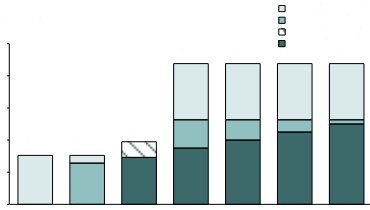
- Replacing more than 10-20% of global transport fuel energy will require second generation (cellulosic) biofuels
- 1G industry provides a platform for 2G process development, enhancing ethanol yield from current feedstocks
  - Brazil (Bagasse)**
  - US (Corn cobs & stover)**
  - EU (DDGS, beet pulp)**



# Liquids demand growth from non-OECD countries...

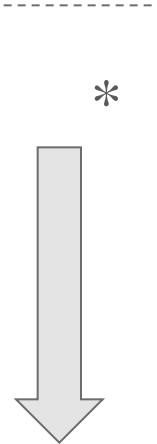


# By 2010 startup, UK biofuel mandate was 60% less than the policy target when Ensus was financed



*RTFO year  
(April-April)*

**2007**  
Ensus financed &  
construction start



**2010**  
Ensus plant  
start-up

# What the UK biorefining industry needs from UK policymakers

1. Support for industry plans to roll out higher blends (E10)
2. Consultation on an extended RTFO with targets from 2014 through to 2020 in line with RED & FQD obligations
3. RTFO targets based on GHG savings to rebalance supply towards the most sustainable fuels, and deliver the FQD
4. Recognition of the important role that bio-refining will play in the UK's bioeconomy strategy