

U.S. Raw Material Sources for Biodiesel Production

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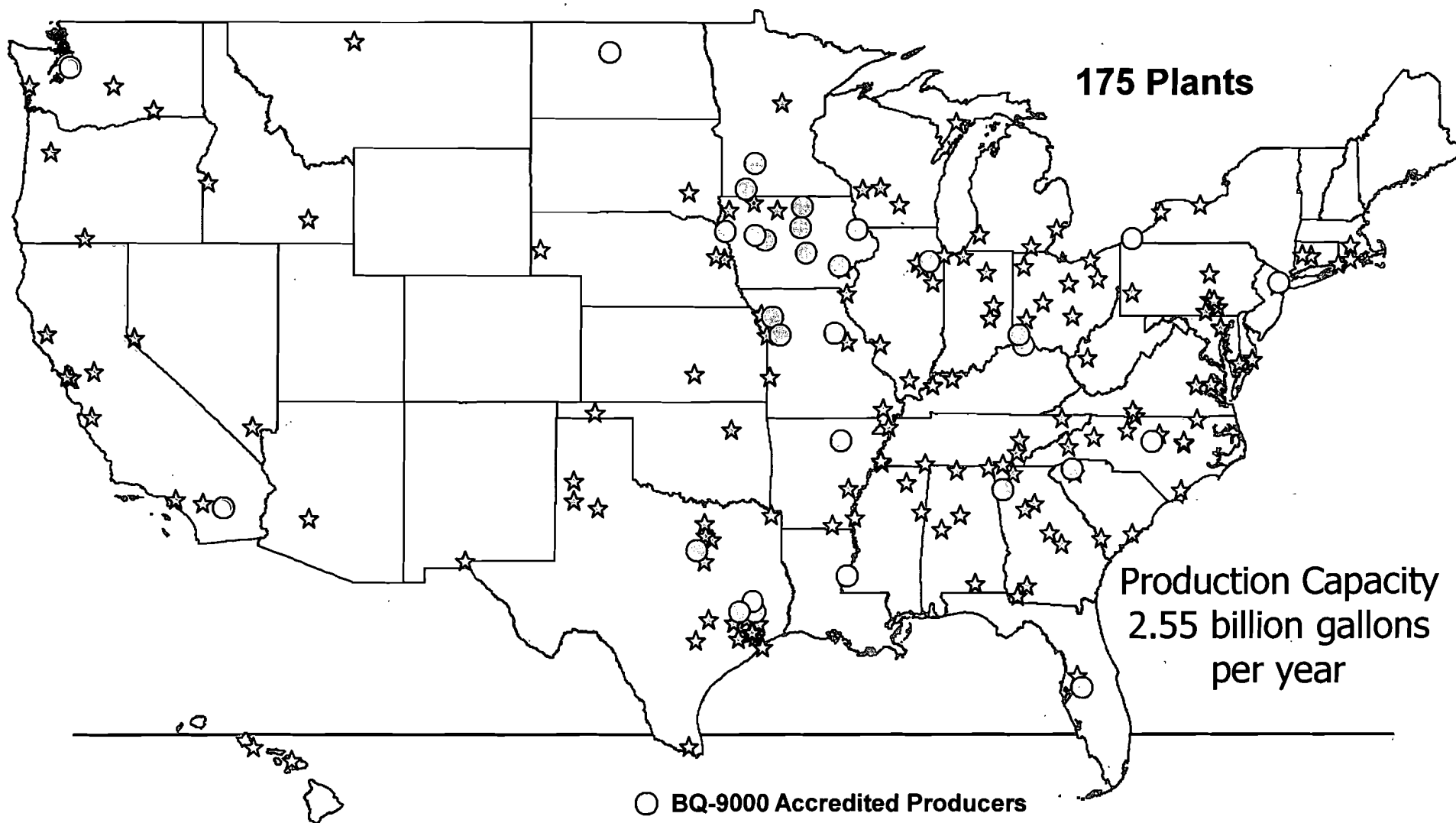
National Biodiesel Board

- Represents the biodiesel industry as the coordinating body for research and development in the US.
- Founded in 1992 by state soybean commodity groups.
- NBB's membership is comprised of state, national, and international feedstock and feedstock processor organizations, biodiesel suppliers, fuel marketers and distributors, and technology providers.
 - More than 400 members
 - Headquartered in Jefferson City, MO
 - Office also in Washington, DC



**Will industry capacity and
raw material sources be
sufficient in 2012?**

Production Locations (9/17/08)

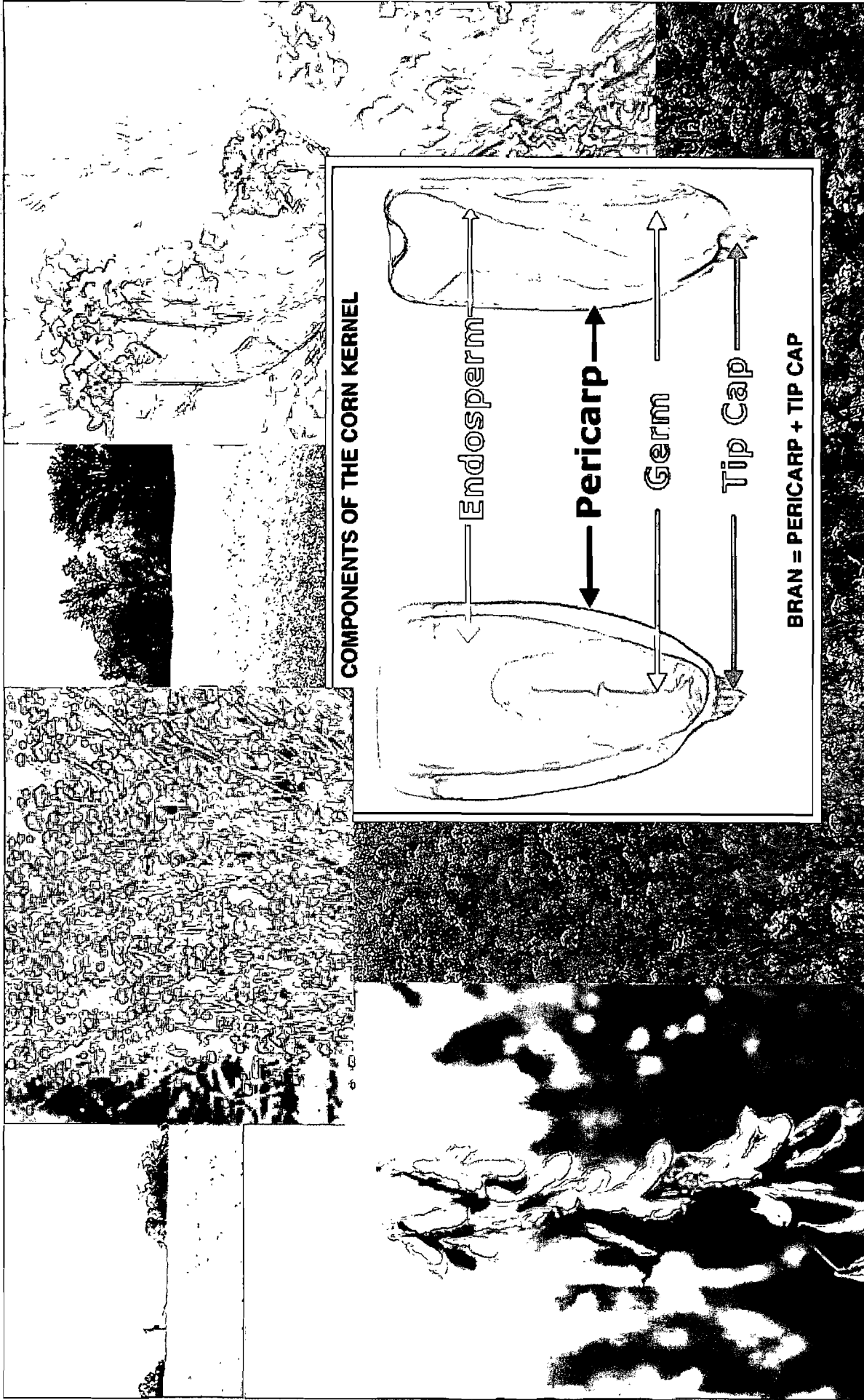


Production Capacity by State

(9/17/08)

Near Term Potential

Near Term Raw Material Sources

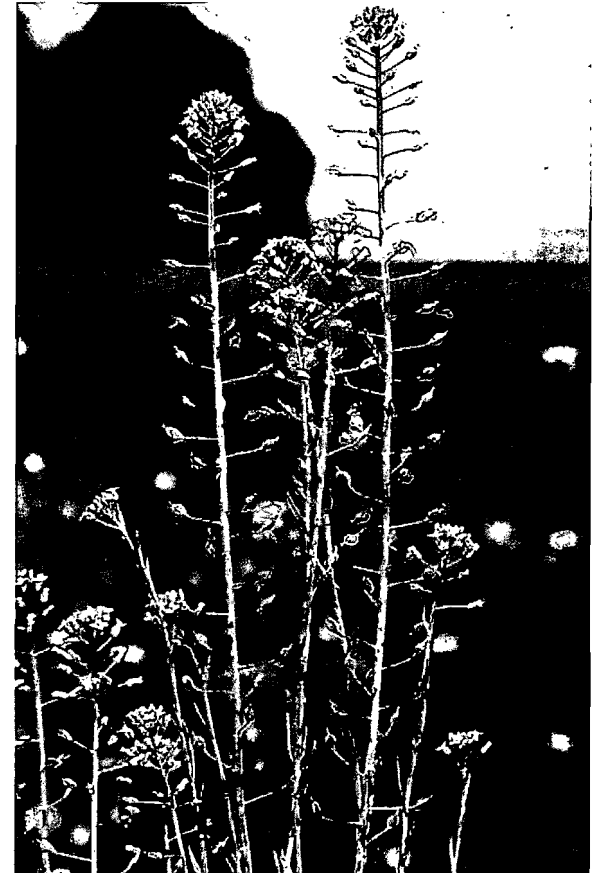


Dry Grind Ethanol Plans

- Reaching the RFSII goal of 15 billion gallons of ethanol would utilize approximately 5 billion bushels of corn
 - Securing 1/3 of the potential corn oil per bushel could generate 400 million gallons of vegetable oil.
 - Recent Announcements
 - October 22, 2007 — GS CleanTech Corporation announced agreement with Northeast Biofuels, LP to extract about 10 million gallons per year of crude corn oil from the distillers grain co-product from Nebraska's new 114 million gallon per year dry mill ethanol plant.
 - June 16, 2008 — ICM Unveils 'Food and Fuel' Technology (dry corn fractionation process).
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Camelina

- ❑ Relatively low input crop
- ❑ 30 to 40% oil
- ❑ Increasing acreage in Montana and PNW
 - ❑ At least two companies contracting acres in 2009 with stated goal of 2 million acres
 - ❑ Represents roughly 10% of wheat acres in 8 state region
 - ❑ Approximately 116 million gallons of potential biodiesel



Winter Canola

- Spring canola acreage in upper Midwest
- Winter canola possibilities in....
 - Great Plains
 - Pacific Northwest
 - Mid-South/Southeast
- U.S. Canola Association working to increase acreage to 2 million acres by 2010
 - Roughly doubling acreage from present
 - Represents an additional 100 million gallons of canola oil