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Biodiesel Infrastructure

Jennifer Case

Background

- 2010 → 2019: CA diesel market: 1% → 22% renewable
- 80% of liquid biofuels imported: driven by LCFS values & obligation
- By 2030: 100% Renewable (RD80 / BD20)

LCFS: Effective & Successful

- Average low-CI biodiesel worth an extra ~$2/gallon
- $0.30 - $0.40 /gallon transport cost
- $1.50 - $1.75 /gallon perceived net value
- VERY attractive to send fuels to California

The Problem – Insufficient Infrastructure

Very limited independent storage & distribution in CA	*Perpetual market glut*
Downstream petro. participants w/proprietary infrastructure	*Refiners, Retailers, Traders*
Forcing deeply discounted prices	*Not shared w/ consumers or producers* *Under-utilization of CA prod. assets*

The Solution – 100% Renewable Infrastructure

- Small investments in independent storage & distribution
  - Non-petroleum
- Focus on RD/BD blends
- De-bottlenecks distribution
  - Enabling full utilization of in-state production
- Dramatic de-carbonization of heavy-duty diesel sector
- Immediate carbon ROI: 50-75 cents/MT
  - Over next 10 years
- Immediate deployment of near-zero-emission equipment
  - Significant criteria tailpipe emissions reduction

Thank You!

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