

Australian Biofuels 2019

Policy Overhaul Overdue

Client Report Scope

June 2019

Dear Industry Colleague,

In 2018, the ethanol and biodiesel sector continued to languish. The biodiesel industry has already collapsed. Despite some states' efforts to support the sector, fuel ethanol demand in Australia continues its declining trend only to be offset by increasing ethanol exports. New innovations are few but could be more.

Government policies, many which have been in place over the last 10 years, have failed to attract new sustainable investment or stimulate consumer demand for biofuels.

Australia is in need of a 'clean sheet' biofuel policy overhaul.

Released in June 2019 and in its thirteenth year of publication, **Australian Biofuels 2019** is the only comprehensive study of its kind in Australia to provide clients with an exclusive and insightful analysis into the Australian biofuel sector. **Australian Biofuels 2019** coverage includes:

- ✓ OVERVIEW OF BIOFUEL DEVELOPMENTS - demand, supply, E10 sales;
- ✓ AUSTRALIAN BIOFUEL PLANTS - planned new projects and feedstocks;
- ✓ ETHANOL/BIODIESEL ECONOMICS - margins, pricing and ethanol exports;
- ✓ BIOFUEL FEEDSTOCKS for - Australia and overseas;
- ✓ STATE MANDATE PERFORMANCE - discovering new twists and effectiveness, IPART;
- ✓ ADVANCED BIOFUELS - in Australian, project updates, ARENA, CEFC;
- ✓ WORLD BIOFUEL DEVELOPMENT - update on growth and changing trade patterns;
- ✓ SUSTAINABLE AVIATION FUELS (SAF) - production pathways and update;
- ✓ FEDERAL GOVERNMENT POLICY - excise update, liquid fuel security, fuel Standards;
- ✓ MARINE FUELS - new opportunities for biofuels.

Whether you are a participant in the bioenergy sector, a policy maker or policy influencer, a trader or a potential investor, it pays to have an independent view and a complete understanding of the Australian biofuel industry. **Australian Biofuels 2019** does exactly that.

See the attached for Table of Contents, Order Form and Study Team details.

Regards

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*APAC Biofuel Consultants (BN 04665650) is a joint venture of EnergyQuest Pty Ltd (ABN: 51110284270) and Ecco Consulting Pty Ltd (ABN 18109919799). Graeme Bethune is the CEO of EnergyQuest and Mike Cochran the CEO of Ecco Consulting.

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ORDER FORM

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	Report Fees (excluding GST)
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***Australian Biofuels 2019** is a client report, researched and prepared by **APAC Biofuel Consultants**, released in June 2019. **APAC Biofuel Consultants** (BN 04665650) is a joint venture of EnergyQuest Pty Ltd (ABN: 51110284270) and Ecco Consulting Pty Ltd (ABN 18109919799). Graeme Bethune is the CEO of EnergyQuest and Mike Cochran the CEO of Ecco Consulting.

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THANK YOU FOR YOUR ORDER

Study Team

Mike Cochran (Lead Researcher)

In 2004 Mike Cochran established Ecco Consulting Pty Ltd to provide marketing and commercial services to the oil, gas, petroleum sectors in Australia and overseas. Ecco specialises in market research, business analysis, and strategy development covering liquid fuels such as biofuels, crude oils and natural gas liquids in Australia and Asia.

APAC Biofuel Consultants is an Ecco Consulting and EnergyQuest joint venture. Since its formation in 2006, APAC has researched thirteen editions of its annual **Australian Biofuels** report. This client report has become a leading and widely quoted analysis on the Australian biofuels industry. Clients include governments, oil producers, energy and agriculture trading companies, international refiners, biofuel producers, investment banks, and local governments.

Prior to establishing Ecco Consulting, Mike held various senior commercial and marketing positions with some of the world's largest resource and petroleum organisations – most recently 22 years with Santos Ltd, and before Santos, with Rio Tinto (CRA, Mary Kathleen Uranium, Bougainville Copper Ltd) and BHP.

Mike has a degree in Economics from Sydney University and post graduate Diploma of Oil Supply and Refining (University of Oxford).

Dr Graeme Bethune

Graeme Bethune is CEO of EnergyQuest, which he established in 2005 to provide strategic research on Australian oil, gas and other energy sources. EnergyQuest's clients include major Australian companies, most Australian governments, institutional investors and a number of international companies.

EnergyQuest also produces the EnergyQuarterly, which provides comprehensive and timely analysis of oil and gas production, reserves, development projects and gas contracts in Australia.

The company has also undertaken major multi-client studies of coal seam methane and biofuels and provided strategic advice on acquisitions and major energy contracts.

Prior to establishing EnergyQuest, Graeme had 30 years in senior finance and corporate affairs roles. For 10 years he held a range of senior positions with the Australian energy group, Santos, reporting to the CEO, responsible for finance, business development, investor relations and media. This included over \$2 billion of major financing and asset acquisitions and divestments.

Graeme has a first-class honours degree in economics from Monash University and a PhD from the Australian National University. He has undertaken the executive program at the Graduate School of Business at Stanford University and is a member of the Society of Petroleum Engineers and the Petroleum Exploration Society of Australia.
