

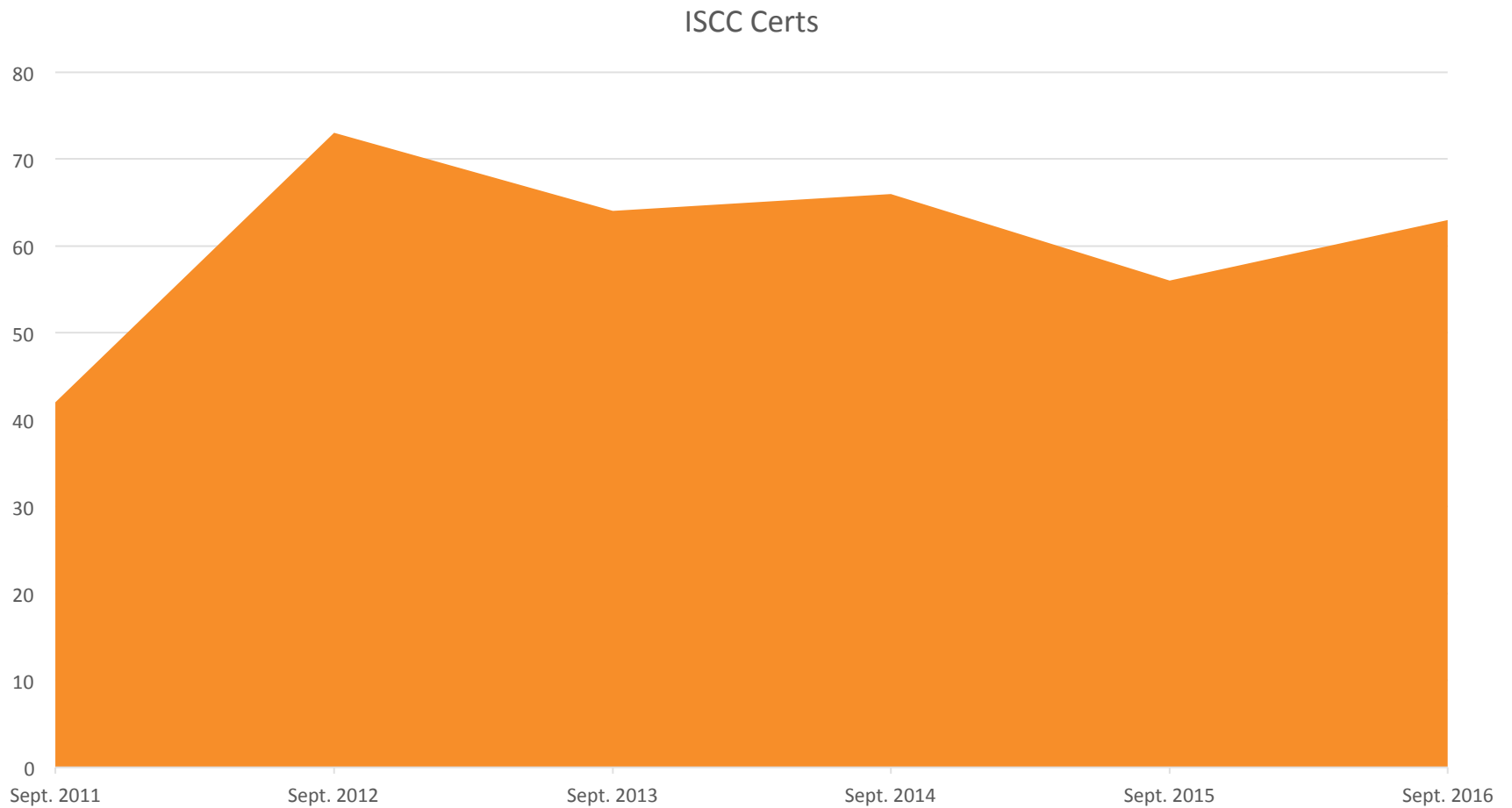


Overview of North American Market for Certification

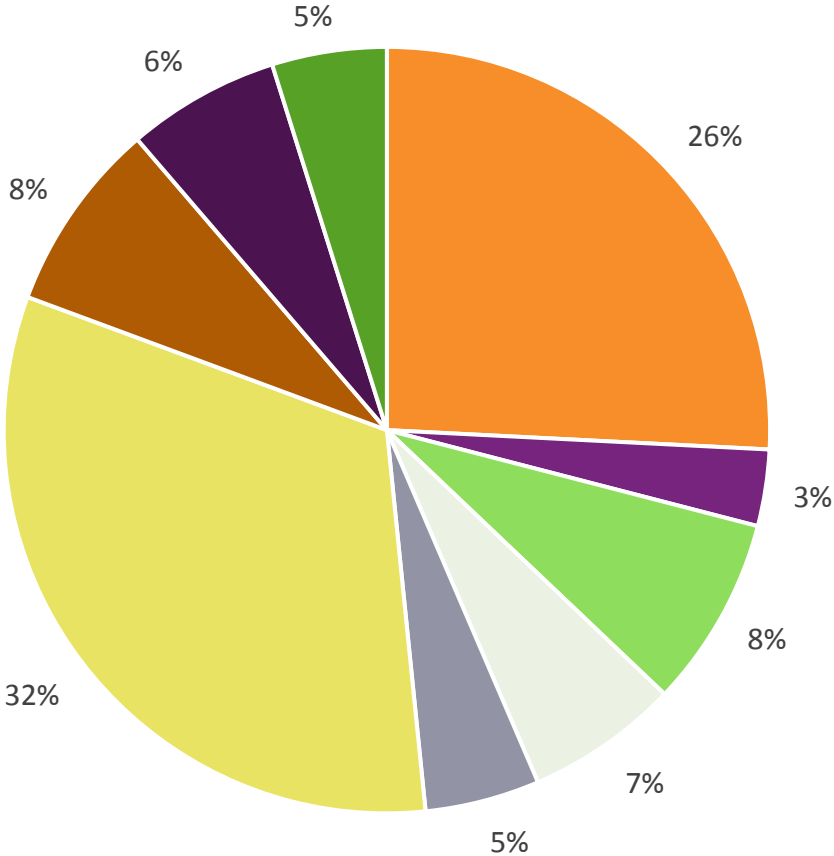
Neil Mendenhall

*Manager of Biofuels & Bio-based
Products*

ISCC Certificates in US and Canada



ISCC Certificates in the US and Canada



UCO BioDiesel Corn Ethanol Corn FGP ISCC Plus (BioP) Trader BioMethane Canola FGP Oil Mill

Many Brands Have Committed to Sustainable Sourcing of Major Commodities by 2020

- Many have accepted ISCC either directly or through its achievement of SAI
- RSPO for Palm (most goals met with Green Palm certificates)
- Bonsucro for Sugar
- Non-certification systems prevail for meeting goals other than Palm (e.g. Company Responsible Sourcing Guidelines, Field to Market, etc.)

Achievements of Sustainable Sourcing

| | Palm Oil | Soy | Sugar | Corn | Rapeseed |
|-------------------|----------|--------------|--------------|--------------|----------|
| Nestle | 47% | 43% | 40% | No Goal | No Goal |
| Unilever | 100% | 43% | 60% | No Goal | 76% |
| Kellogg | 100% | No Goal | % Not Stated | % Not Stated | No Goal |
| Starbucks | 100% | No Goal | No Goal | No Goal | No Goal |
| L'Oréal | 100% | 100% | No Goal | No Goal | No Goal |
| Mars, Inc. | 100% | No Goal | No Goal | No Goal | No Goal |
| Hershey | 100% | No Goal | % Not Stated | No Goal | No Goal |
| Mondelēz | 100% | No Goal | No Goal | No Goal | No Goal |
| Reckitt Benckiser | 4% | No Goal | No Goal | No Goal | No Goal |
| Coca Cola | < 50% | % Not Stated | 20% | No Goal | No Goal |
| General Mills | 100% | No Goal | 59% | 26% | No Goal |
| Pepsi | 100% | % Not Stated | % Not Stated | No Goal | No Goal |
| Colgate | 100% | % Not Stated | No Goal | No Goal | No Goal |

Future Opportunities in North America

- More brands including Corn, Canola and Soy in their Sustainable Sourcing Programs
- Movement from Green Palm certificates (palm off-sets) to full Chain of Custody
- California Low Carbon Fuel Standard (LCFS) – new verification requirements coming in 2018
- Bio-based packaging