



CAAFI[®]

CAAFI 2014 General Meeting & Expo

Opening Remarks

Steve Csonka,
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Michael Huerta
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Produced by



Opening Remarks

Commercial Aviation Alternative Fuels Initiative

Biennial General Meeting, 2014

Takeoff Toward Commercialization

Washington Marriott, Washington, DC



Housekeeping

* Team:

- * Marriott
- * CAAFI
- * Kallman Worldwide



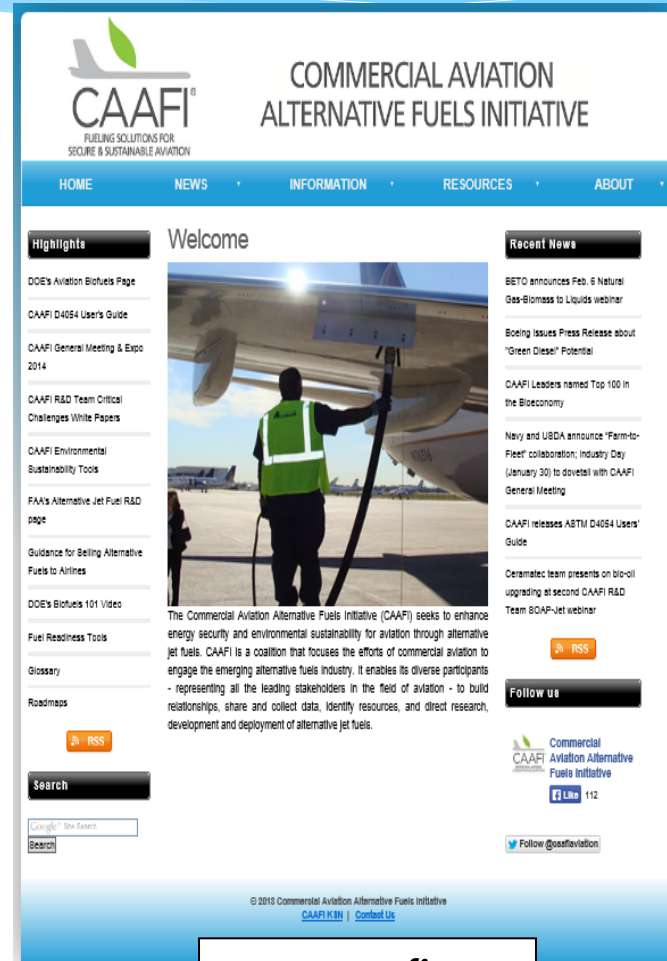
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The screenshot shows the homepage of the Commercial Aviation Alternative Fuels Initiative (CAAFI). The header features the CAAFI logo with the tagline 'FUELING SOLUTIONS FOR SECURE & SUSTAINABLE AVIATION' and the full name 'COMMERCIAL AVIATION ALTERNATIVE FUELS INITIATIVE'. A navigation bar includes links for HOME, NEWS, INFORMATION, RESOURCES, and ABOUT. The main content area is titled 'Welcome' and features a large image of a person in a green safety vest refueling an aircraft. To the left of the main image is a 'Highlights' sidebar with links to various reports and guides. To the right is a 'Recent News' sidebar with links to recent press releases and webinars. At the bottom of the page, there is a search bar, a copyright notice for 2013, and social media links for LinkedIn and Facebook.

www.caafi.org

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* Kallman Worldwide

The screenshot shows the homepage of Kallman Worldwide Inc. The header features the company logo and a navigation menu with links for 'OUR SERVICES', 'UPCOMING EVENTS', 'PAST EVENTS', 'PRESS', 'PHOTO GALLERY', and 'CONTACT US'. Below the header is a tagline: 'HELPING BUSINESS CONNECT THROUGH TRADE SHOWS • TRADE MISSIONS • SPECIAL EVENTS • CUSTOM DISPLAYS'. A search bar with the text 'Google Custom Search' is positioned on the right. The main content area is divided into two columns. The left column contains text: 'Established in 1963, Kallman Worldwide is an international trade show organizing company that represents and promotes some of the world's leading events.' and 'Best known for our award-winning "U.S. International Pavilions", Kallman Worldwide also uses its decades of experience to provide advice and assistance to globally-minded companies as they establish or increase their business abroad through international trade shows and trade missions.' Below this text are social media icons for Twitter, LinkedIn, and Facebook. The right column features a large photograph of a busy trade show floor with several men in business attire engaged in conversation. Below the photograph are four blue buttons with white text: 'I'd like to EXHIBIT or VISIT A SHOW', 'I'd like to enter the EXHIBITOR ZONE (Registered Exhibitors)', 'I'd like to learn about EXPORTING', and 'I need an experienced STAND BUILDER'. At the bottom left, there is a link to 'Join our mailing list' with the subtext 'Get the earliest information on selected international trade opportunities right in your inbox!'. At the bottom right, there is a badge that reads 'Kallman Worldwide, Inc. Proud Recipients of the President's "E" Award'. The footer contains the text 'Visit the U.S. Pavilion at these upcoming events'.

Logistics

* Event App

<http://eventmobi.com/caafi/>

* Agenda

* Contacts

* Bios

* Polling

CAAFI AGM: Theme - Takeoff toward Commercialization

Times approx.	Tues, 28Jan		Wed, 29Jan
7:00 - 08:10	Registration, Breakfast, Networking		
8:10 - 09:00	Opening Remarks VIP Address(es)		CAAFI Work Teams, Plenary Summary Session
9:00 - 10:30	Government Partners' Activities Update	8:15 - 09:30	
	10:30-11:00 Break		9:30-10:00 Break
11:00 - 12:25	Finance Panel	10:00 - 11:00	Public-Private Partnership Efforts
		11:00 - 12:25	Local Initiatives
12:30 - 1:30	Lunch & Keynote #1 Brad Tilden	12:30 - 1:30	Lunch & Keynote #2 USDA Sec. Vilsack
1:30 - 2:00	Biggest Challenges	1:30 - 2:30	Airline & Partners Panel 1
2:00 - 3:10	Work Team's Breakout I		2:30-3:00 Break
	3:10 - 3:30 Break	3:00 - 4:00	Airline & Partners Panel 2
3:30 - 5:30	Work Team's Breakout II	4:00 - 5:30	International Initiatives
5:30 - 6:45	Cocktails	5:30	Closing Remarks
7:00p -	No Host Dinner Teddy & The Bully Bar State of the Union		

Welcome

- * **Who we are – CAAFI members & invited guests**

- * From across the supply chain
- * From around the world
- * Many first-time attendees

- * **Why we're here**

- * Celebrate
- * Contemplate
- * Collaborate
- * Instigate
- * Invigorate

U.S. States /
State Univ's

Aircraft,
Engine, Subsystem
OEM's

Fuel
producers

Airlines,
Military,
Airport orgs.

U.S.
Government
Offices

15 Countries /
5 Continents



Airlines for America[™]
We Connect the World



CAAFI - Public/Private Partnership

A reflection of the 22B+ usg US jet fuel “market pull”

An Aviation Industry Coalition Established to Facilitate and Promote the Introduction of Alternative Aviation Fuel

Goal is development of non-petroleum jet fuel production with:

- * **Equivalent safety & performance (drop-in)**
- * **Comparable cost**
- * **Environmental improvement**
- * **Security of energy supply for aviation**

**Synthetic kerosene,
primarily from
renewable sources**

Enables its diverse stakeholders to build relationships, share and collect data, identify resources, and direct research, development and deployment of alternative jet fuels

Sustainable Alternative Jet Fuel (SAJF)

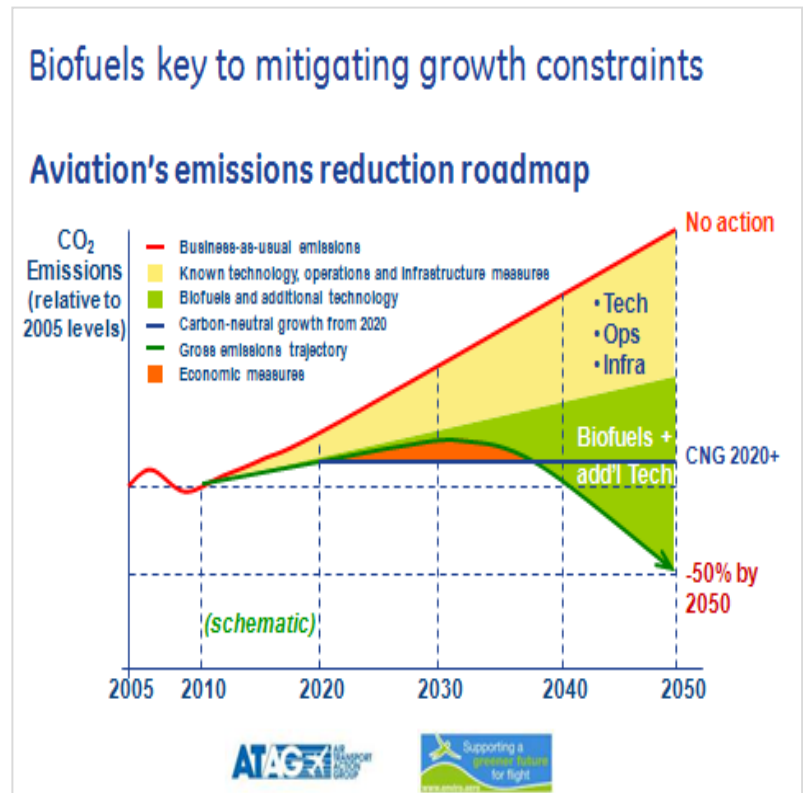
Why we care!

Aviation commitments

- * **Improving sustainability**

Industry alignment on need, as SAJF can bring:

- * **Carbon relief**
- * **Supply surety, Price stability**
- * **Energy security**
- * **Lower LAQ emissions**
- * **Improved energy mass density**
- * **Minimal infrastructure impact**
- * **Economic opportunity**



No near-term viable kerosene alternatives, and ...
SAJF works! Challenges, but Lots of Options!

Status Summary:

SAJF is key for meeting industry's commitments

We know how to make it - broad range of inputs & processes

Modest amounts of SAJF coming online

Working challenges: price, supply-chain, investment

The industry plans to continue their efforts

Potential for acceleration a function of engagement

Opening Remarks

* **Michael Huerta**

FAA Administrator

* **Sharon Pinkerton**

A4A SVP Legislative and Regulatory Policy

* **Dr. Michael Knotek**

Deputy U/S, Office of the U/S for Science and Energy

Where we're working

CAAFI Facilitation – broad and deep

Feedstock Development

Pathway Development

Sustainability

Price Point

Risk Reduction

Institutional Alignment

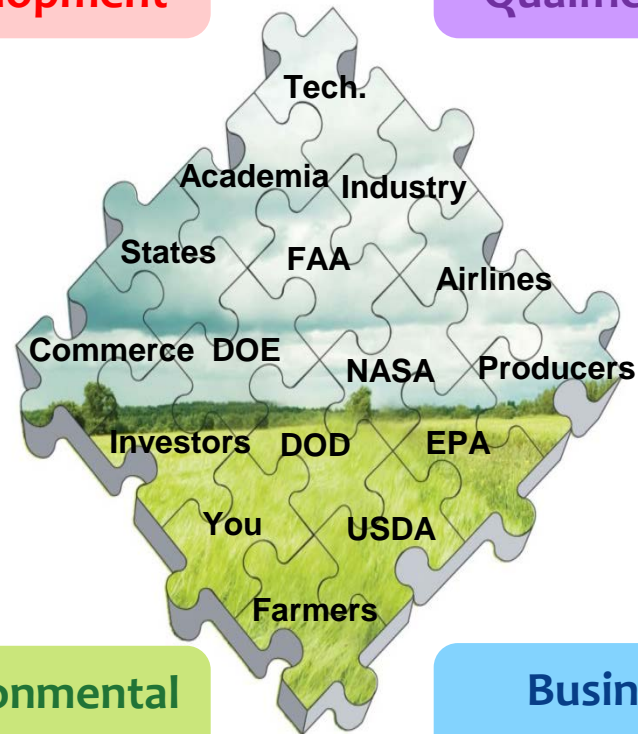
Analysis / Tools

Regional Engagement

Int'l Engagement

Research & Development

Certification & Qualification



Environmental

Business

In last 12 months

ASTM Task Forces Progressing, 3 Ballots in this quarter

Feedstock Development

Pathway Development

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SAJF Players
Using their I.P. to drive down Opex / Capex

Logos displayed include: UOP (A Honeywell Company), RENTECH, gevo, TOTAL, KIOR, bp, Shell, VALERO, LanzaTech, AMYRIS, VIRENT, Chevron, SABOT, DARLING, BYOGY, Swedish BioFuels, Licella, Dynamic Fuels, NESTE OIL, ZeaChem, Cobalt, Syntroleum, Air Air Fuels, ConocoPhillips, FRONTLINE, EMERALD BIOFUELS, Fulcrum, Nature's Bioreserve, and IR1 Group.

FT-SPK, HEFA, SKA, ATJ, HDCJ, DSH, CCS, GCC

In last 12 months

Feedstock Development
Pathway Development
Sustainability
Price Point
Risk Reduction
Institutional Alignment
Analysis / Tools
Regional Engagement
Int'l Engagement

**CAAFI complements FRL Tools:
Environmental Sustainability**

**O/view & Environmental
Progression Tool**

**NASA initiates in flight
emissions testing program
CAAFI pursuing GHG**

methodology harmonization

**EPA Qualifies Alternative Jet Fuel
Pathways under the RFS Program**

In last 12 months

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UAL/AltAir announce

Price Competitive DPA

**DOE announces intent to
focus on Drop-Ins & C.o.P.
UAL issues another RFP**

**KLM Executes Transatlantic
Flight Demos**

**SkyNRG continues
making progress**

In last 12 months

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USDA/DOE/DOE DPA Phase 1 Awards

EMERALD BIOFUELS



Nature's
Bioreserve



DOE Innovative Pilot Awards: 4 Entities

In last 12 months

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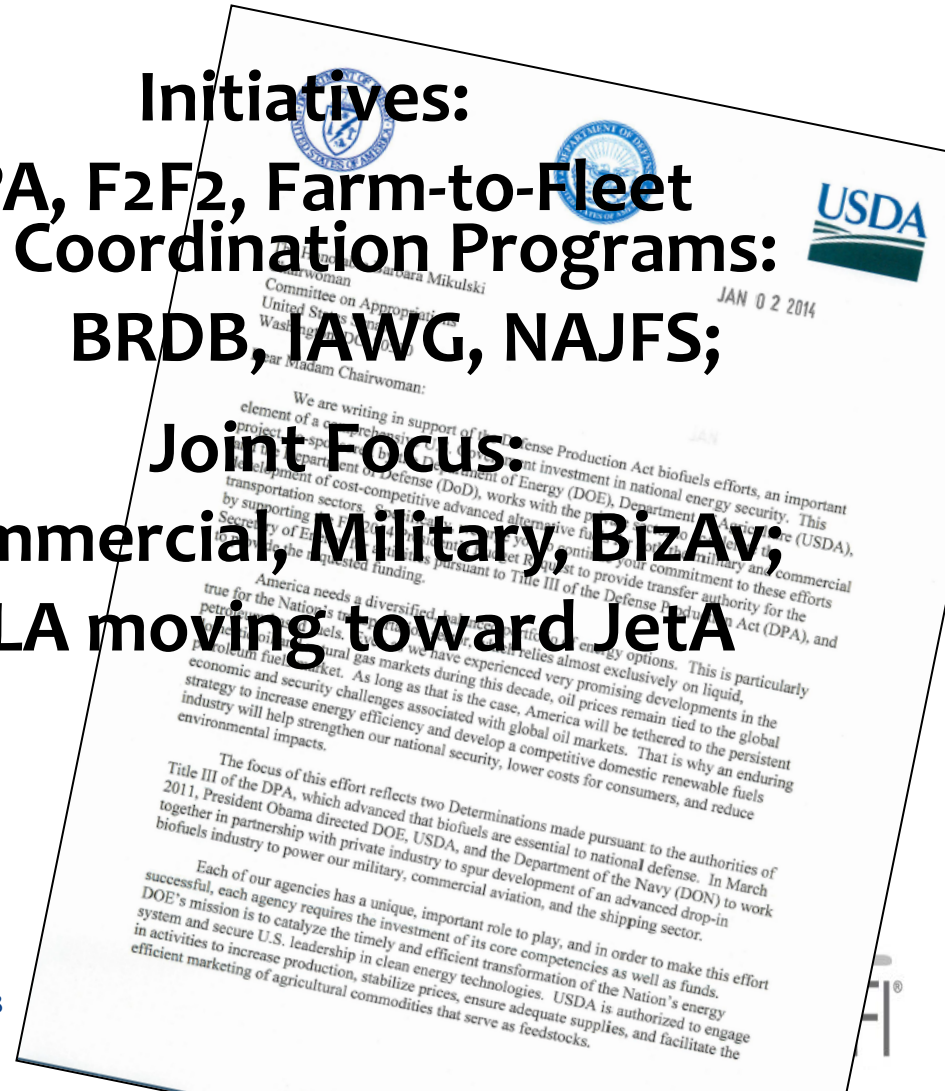
Initiatives:

DPA, F2F2, Farm-to-Fleet
Coordination Programs:

BRDB, IAWG, NAJFS;

Joint Focus:
Commercial, Military, BizAv;

DLA moving toward JetA



In last 12 months

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CAAFI D4054 Users Guide

**CAAFI Guidelines on
Airline Engagement**

**Stand-Up of new FAA COE
Several entities looking at
siting and transportation
optimization tools**

In last 12 months

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**Regional Assessments:
MASBI Concluded, ABWG
Continues in NW**

**New evaluation
efforts in CT and VT
F2F2 to target Local
Initiatives in every state**

In last 12 months

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New bilateral with Spain joins existing efforts in Brazil, Australia, & Germany

Homegrown activities expanding, CAAFI working Global Exchange concept

Additional IATA Focal, CAEP WG

Airframers continue supporting airline goals (e.g. SAFUG)

ICAO acknowledges need for Global Approach with Alt Fuels in Basket of Measures

That is real progress!

Now, let's hear more from our Government Partners