



## Certification – Challenges to Increase Demand

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## Dimension

**R\$ 50 bi**  
worth of revenues

**R\$ 20 bi**  
estimated market value

**Over 40,000**  
employees

**65 m tons**  
crushing capacity

## General numbers

World's largest sugarcane ethanol producer and Brazil's largest sugar producer

**860,000 ha**  
of cultivated area

**1,9 bi liters**  
of ethanol

**4 m tons**  
of sugar

**92%**  
mechanized harvesting

**934 MW**  
of installed capacity

## Fuels Commercialization

A highly efficient and trustworthy network

**4,700**  
service stations

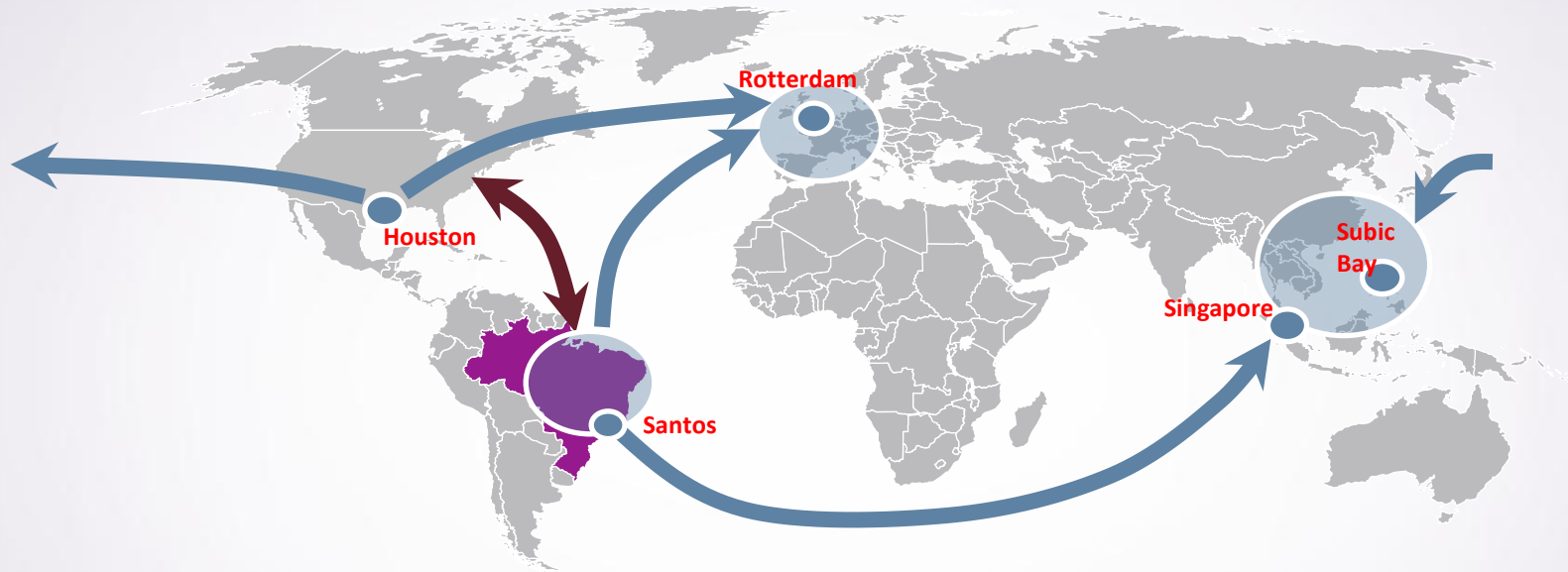
**64**  
distribution bases

**22**  
billion liters/year

**800**  
convenience stores

**54**  
airports

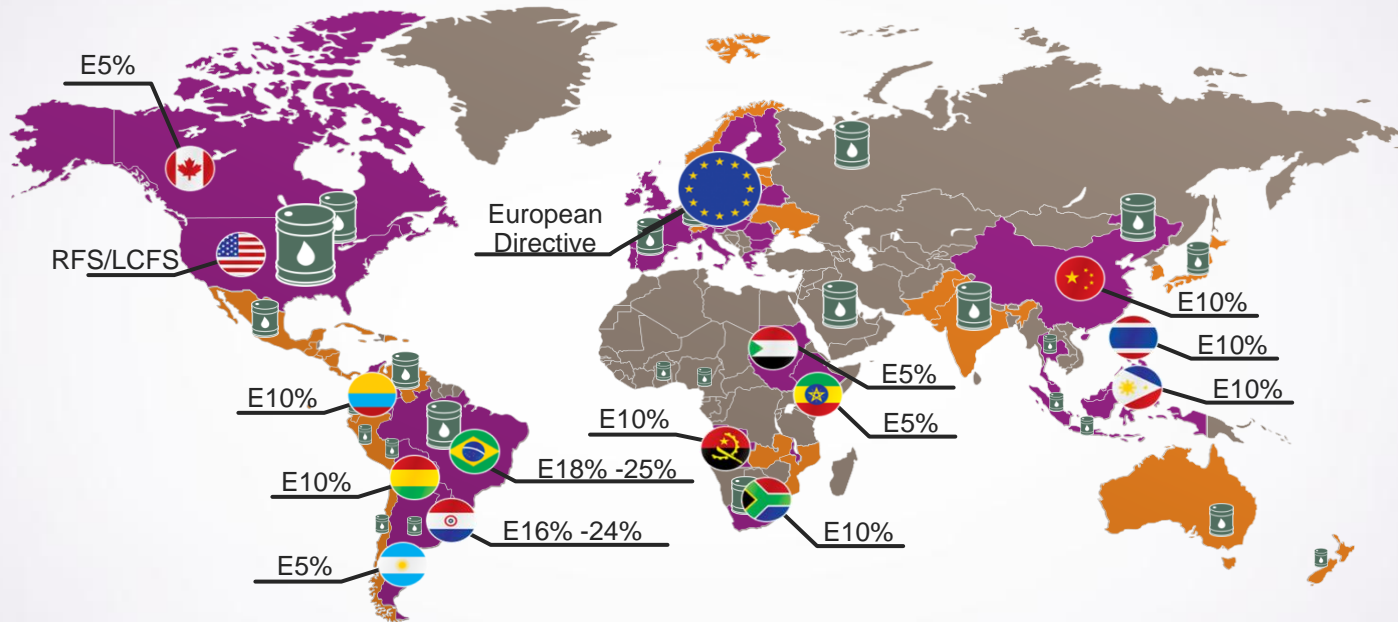
# International Coverage



## Raízen Trading:

- Trading offices in London, Geneva, Houston and Singapore, with integrated strategies
- Support infrastructure logistics with tanks in the USA, Europe and Asia
- Expertise in all ethanol specifications
- Consolidated presence in traditional and specialty industrial markets
- Leader in the flow of products with sustainability certification (EPA, CARB, Bonsucro and ISCC)

# Biofuels Programs around the world



Oil consumption

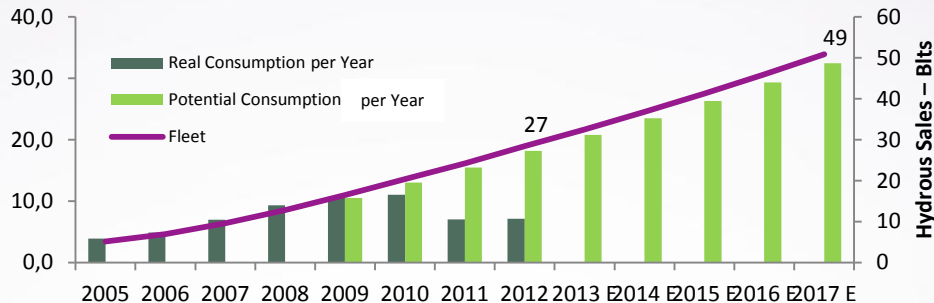


Current mandate



Under discussion

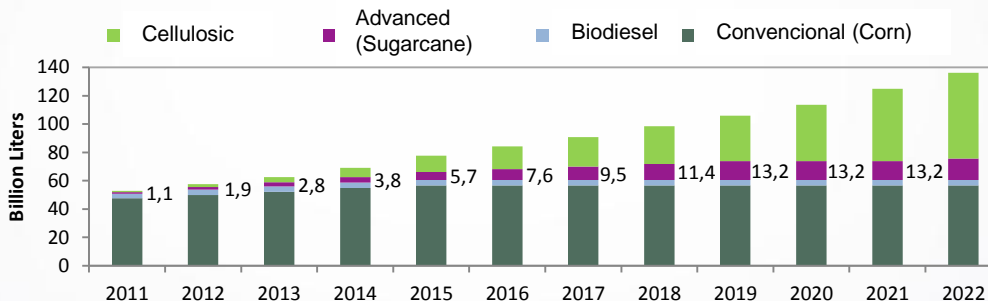
# Main Ethanol Markets



## Scenarios

- Growing fleet
- Lack of new facilities
- Necessity of new public policies

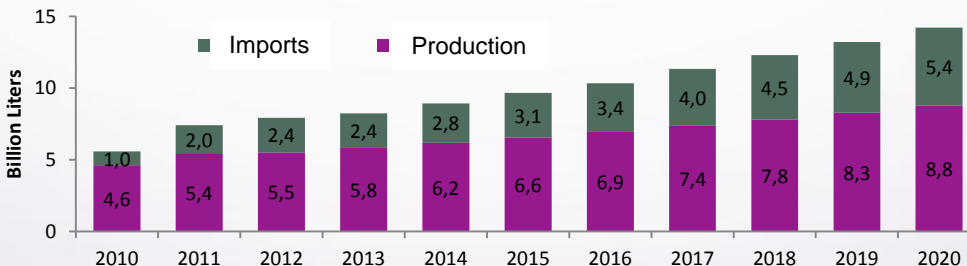
\* Fleet vs Real and Potential Demand



## How to access the market:

- RFS (*Renewable Fuels Standard*)
- LCFS (*Low Carbon Fuels Standard*)

\*Ethanol Demand by type, according to the 2012 mandate. RFS hasn't yet released this year's version



## How to access the market:

- Complying with the RED (Approved Schemes: Bonsucro, ISCC and others)

Source: RFS, LCFS, REDD

# Benefits of the Certification Criteria



## EPA / CARB

- Land use change
- Traceability

## Bonsucro

- Obey the law
- Respect human rights and labor standards
- Manage input, production and processing efficiencies to enhance sustainability
- Actively manage biodiversity and ecosystem services
- Continuously improve key areas of the business



## Benefits to Customer

- Express commitment with the supply chain, sharing responsibilities with the seller and third-party agents (*certification bodies* in the case of Bonsucro)
- Alignment with material demands from the internal/external stakeholders related to sustainability
- Traceability from the tank to the farm, ensuring transparency and credibility

# Challenges to Create Demand

