



Scaling Up

Delivering Canada's low carbon, bio-based economy through sustainable innovation

November 14 - 16, 2016, Fairmont Château Laurier, Ottawa, Canada

www.scalingupconference.ca

WELCOME
TO THE SCALING UP CONFERENCE

Scaling Up will focus on the opportunity for Canada to be at the innovative leading edge of the low carbon, bio-based economy.

Opening Remarks:

Prepared for:
Scaling Up 2016
Ottawa, Canada
November 14 - 16, 2016

Prepared by:
Jeff Passmore, Scaling Up Conference Chair; CEO, Passmore Group Inc.

A lot of folks made this event a success Thanks to our Sponsors!



Thanks to our Speakers & Moderators:

- Twenty Nine Companies including 25 “C- level”
- Five Federal Government Departments
- Five Industry Associations
- Five Journalists
- Four Politicians (active and retired)
- Three Academia/Centre of Excellence
- OECD/EU Commission/BIO/EDC/SDTC

Thanks to our Delegates:

- Without your registration, we would not be here.
- Thank you on behalf of all our speakers for attending, and for making the first “Scaling Up” a success!
- Thank you for travelling to Ottawa from:
Austria, Belgium, France, Italy, USA,
The Netherlands, United Kingdom and
Canada coast-to-coast (7 provinces)!

Why “Scaling Up?”

- Because, according to the OECD, in the 2025 – 2030 period, the bioeconomy will command **an estimated world market of between USD 2.6 and 5.8 trillion.**
- And because, if developed sustainably, the bioeconomy can simultaneously deliver jobs, industrial development, and reduced GHGs emissions. **Our PM’s got it right!**
- But this won’t just happen on its own.
- To take advantage of this massive opportunity, Canadians – in both the public and private sectors – need to get our collective and collaborative skates on.

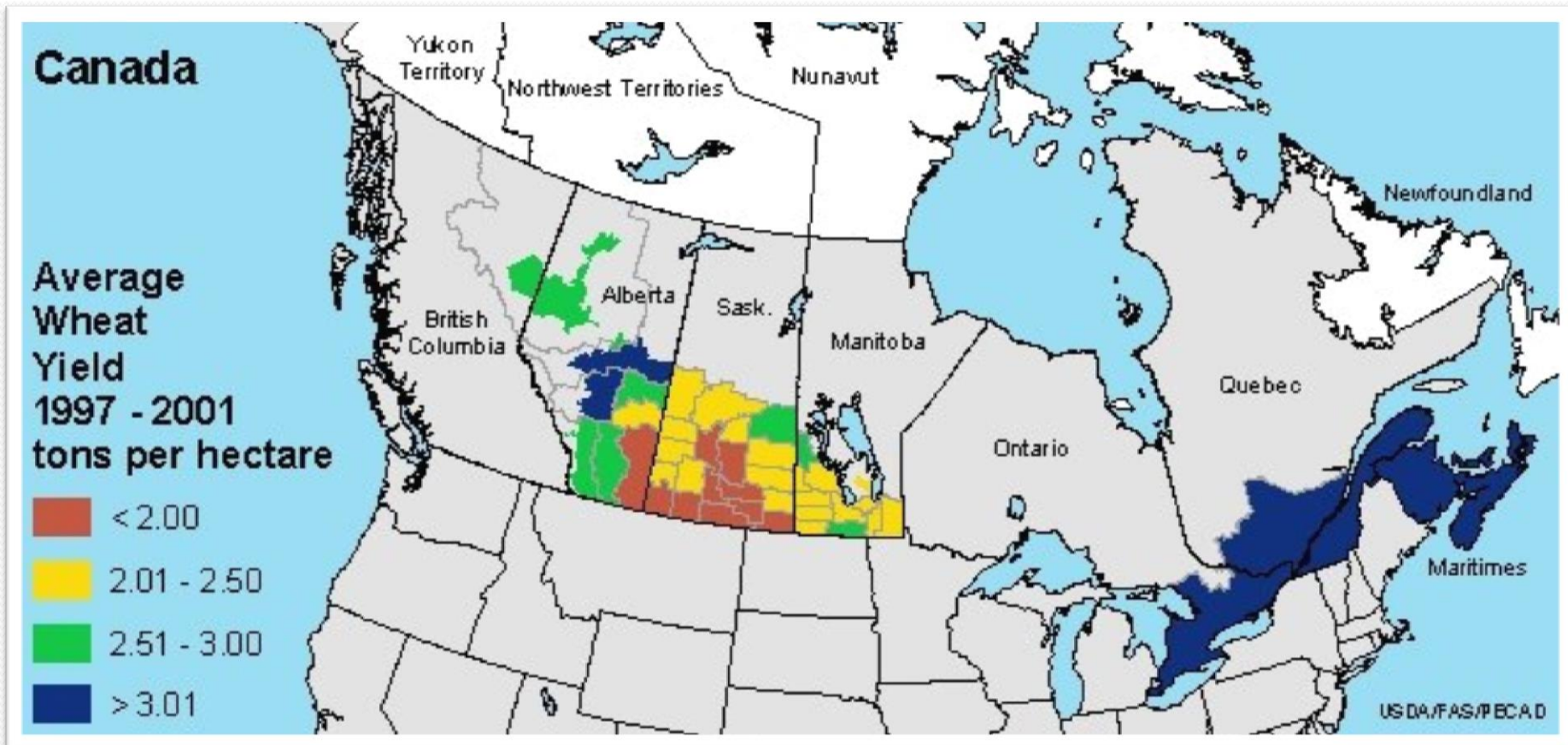
Scaling Up bio-innovation faces many challenges...

- First-of-kind technology scale up risk
- Supply chain risks
- Entrenched competitors with sunk costs
- Uncertain policy environment
- High capex + expensive debt financing
- Uncertain returns on investment

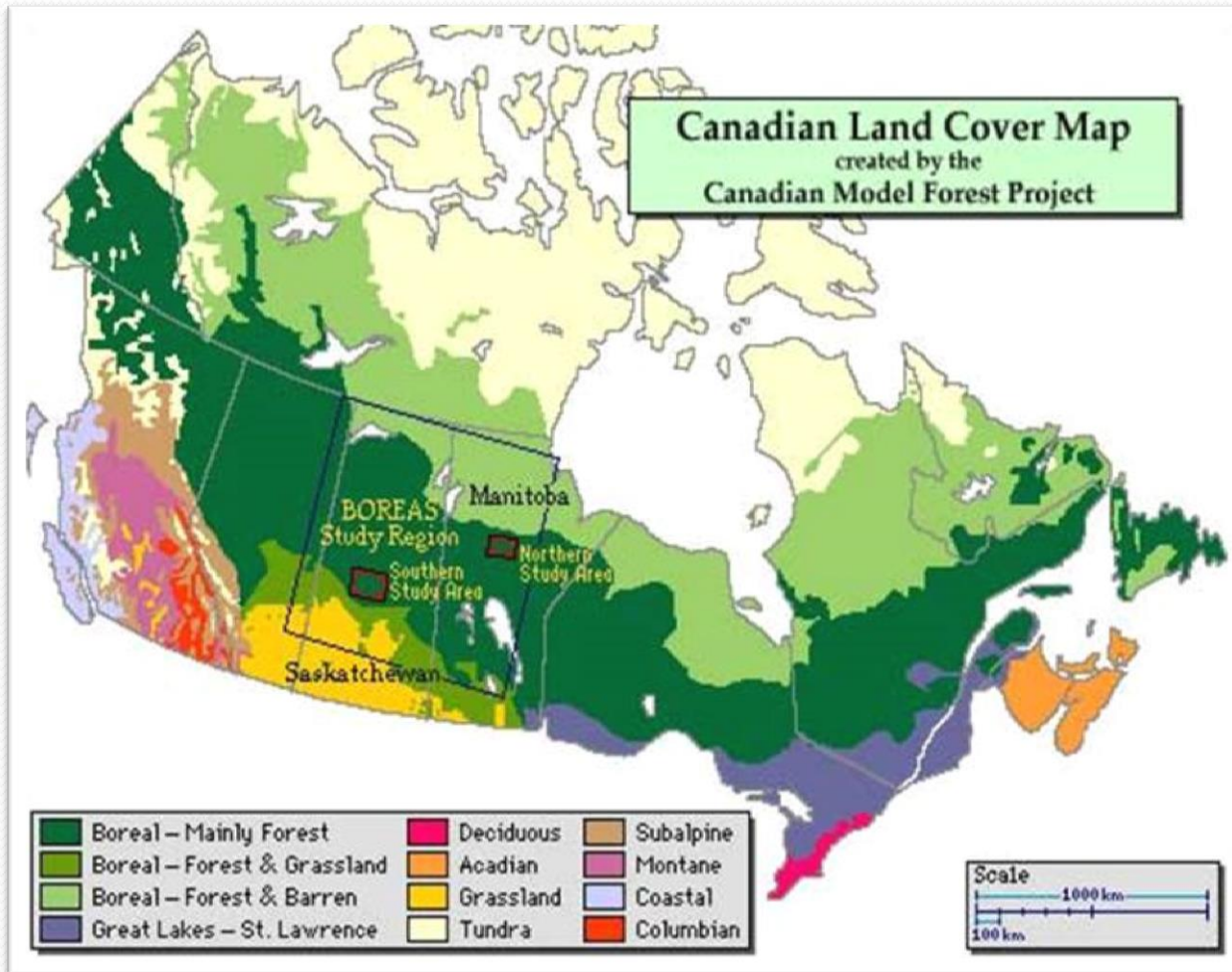
Despite challenges, Canada cannot ignore its extensive biomass resource?

160 million acres of crop & pasture land

Map – Courtesy, Agriculture Division, Statistics Canada / Foreign Agricultural Service, USDA



10% of the world's forest cover: (348 million hectares)



In addition to biomass, look what Canada offers

- **Best country to do business** in the G20 - Forbes and Bloomberg
- **Strongest growth record** among G7 from 2006 - /'15 - OECD
- **Most highly educated workforce** among OECD members – OECD
- **Lowest business taxes** among G7, and 46% lower than in the US - KPMG
- **Lowest business R&D costs** among G7 with 27% cost advantage over the US – KPMG
- **“Most sound” banking system** in the world – World Economic Forum
- **Easy transportation access** to US markets (NAFTA) and EU
- A fun place to live, work and play – **Best quality of life** in G7 – OECD

The Economist

OCTOBER 29TH - NOVEMBER 4TH 2016

The Trump-Putin bromance

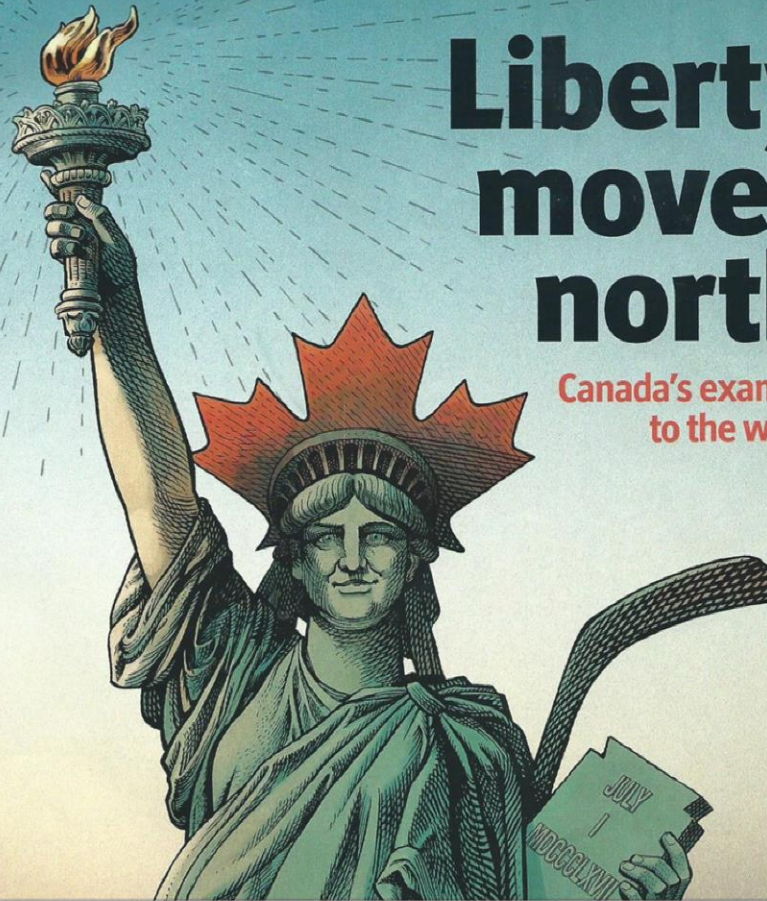
China's fight to control its history

AT&T and the future of TV

Hands off the Bank of England

Liberty moves north

Canada's example
to the world



Sample “bio-entities” active in Canada

- **FP Innovations** – forestry and forest products research
- **Bioindustrial Innovation Canada** - BioIndustrial Centres of Excellence
- **BioFuelNet Canada** – 27 universities partnership with industry

- **Bioamber** – bio succinic acid – Sarnia, Ontario
- **Biox** – Biodiesel – Oakville Ontario
- **CelluForce** - nanocrystals from cellulose – Montreal, Quebec
- **Conifex Timber** – biomass to power – British Columbia
- **EcoSynthetix** – bio-based chemicals – Burlington, Ontario
- **Enerkem** – methanol from MWS – Edmonton, Alberta
- **Ensyn** – fast pyrolysis – Renfrew / Ottawa, Ontario
- **logen** – cellulosic biofuels – Ottawa Ontario, and Brazil
- **Tembec** – green energy – Montreal, Quebec

We need to add to this list by encouraging both domestic and foreign **Direct Investment**

... So Why “Scaling Up?”

Because I imagine a future in which my three grandsons live in a world that protects the environment AND grows the carbo-economy!



Thanks to our Sponsors!



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