

We rethink everyday products. Every day.
You know us better than you think.



Novozymes – The World Leader in Bioinnovation

Who are we?



Global: +6,000 employees,
700 products in 140 countries



R&D intensive: ~7,000
patents, 13-14% of sales
spent on R&D

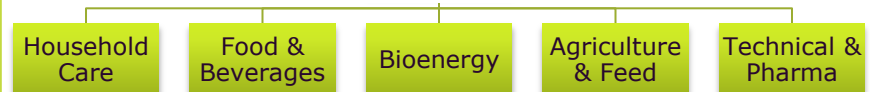


Profitable: \$2.1bn/€1.5bn in
sales and 24.7% EBIT margin
in 2013



Majority owner Novo A/S
controls 25.9% of the capital
and 70.5% of the votes

Founded	1925
Listed	2000
Ticker	NZYM B
Exchange	Copenhagen
Market Cap*	US\$ 15bn
Long-term targets:	> 10% organic sales growth from 2015 > 24% EBIT margin > 22% ROIC

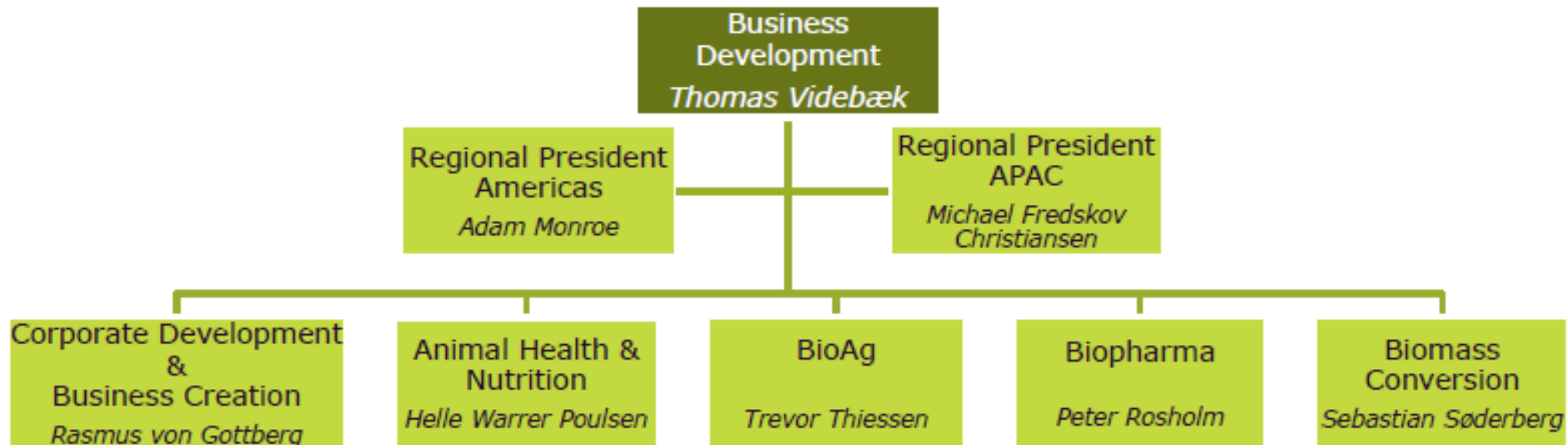


*A+B shares Apr, 2014

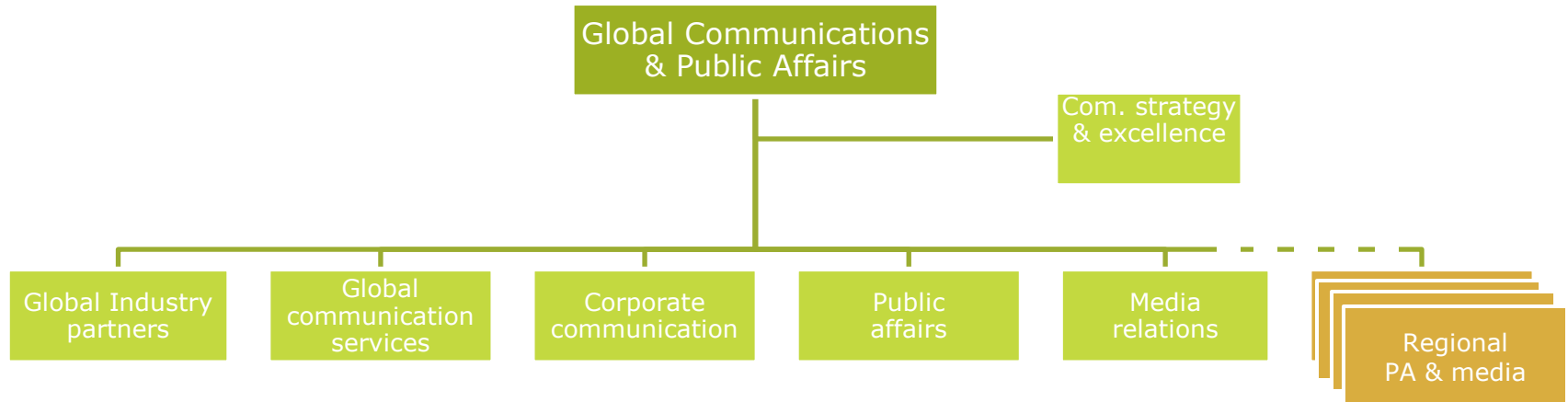
Global Production and R&D Setup



Our team sits in business development



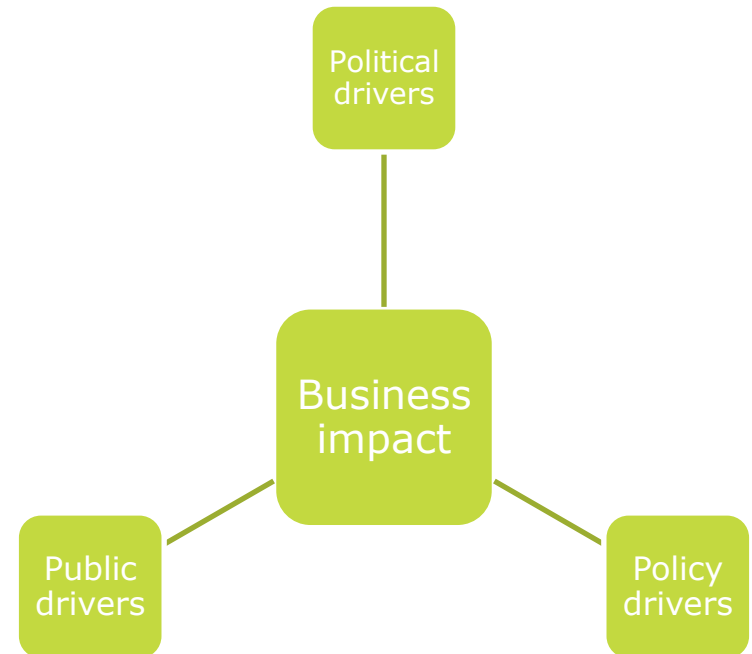
Global Communications & Public Affairs



In Region NA PA/Comm, we hunt for drivers

Drivers create opportunity.

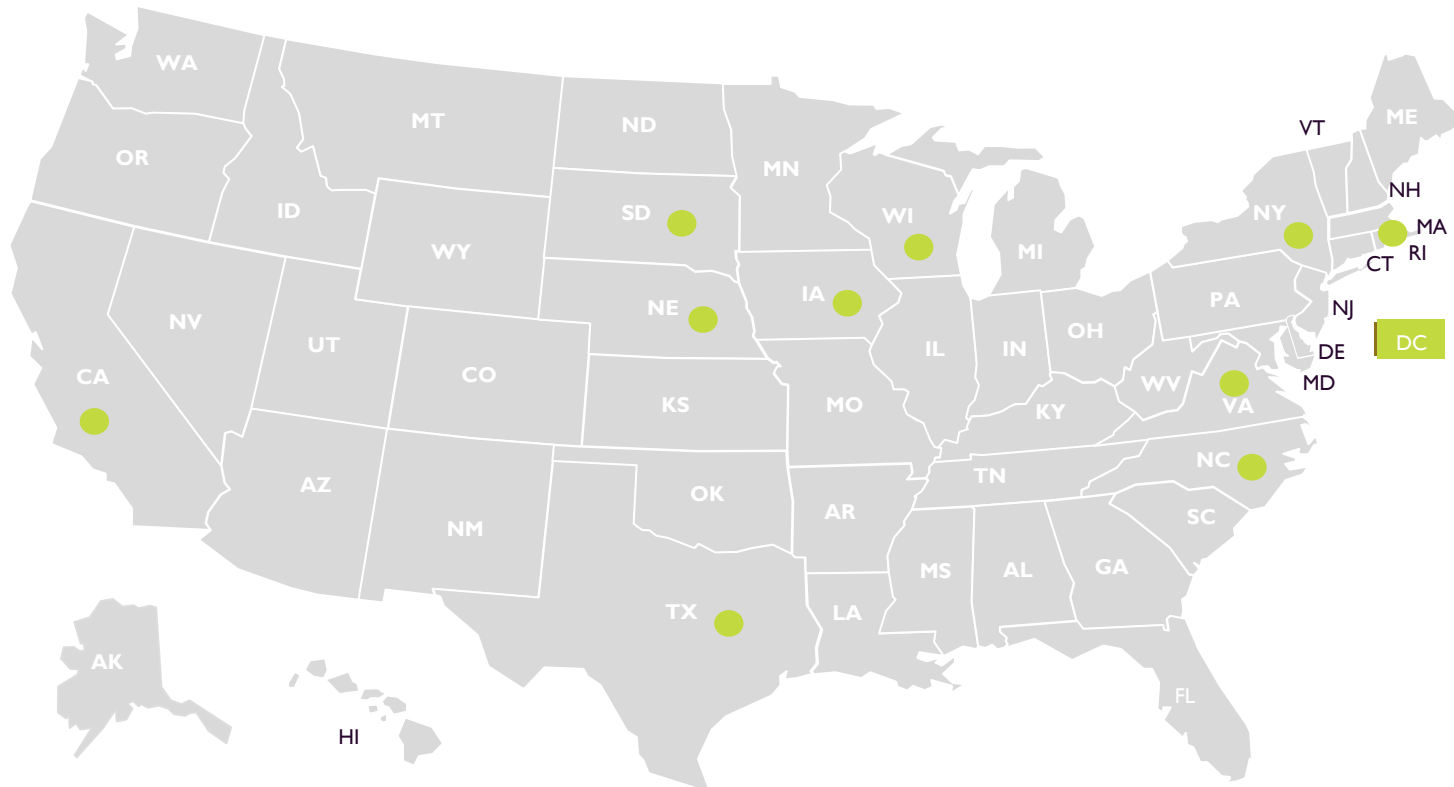
What we do well in Region NA PA/Comm is understand the relationship between **political**, **policy** and **public** drivers, how they are affected by conditions on the ground and how to leverage those drivers and conditions for business impact.



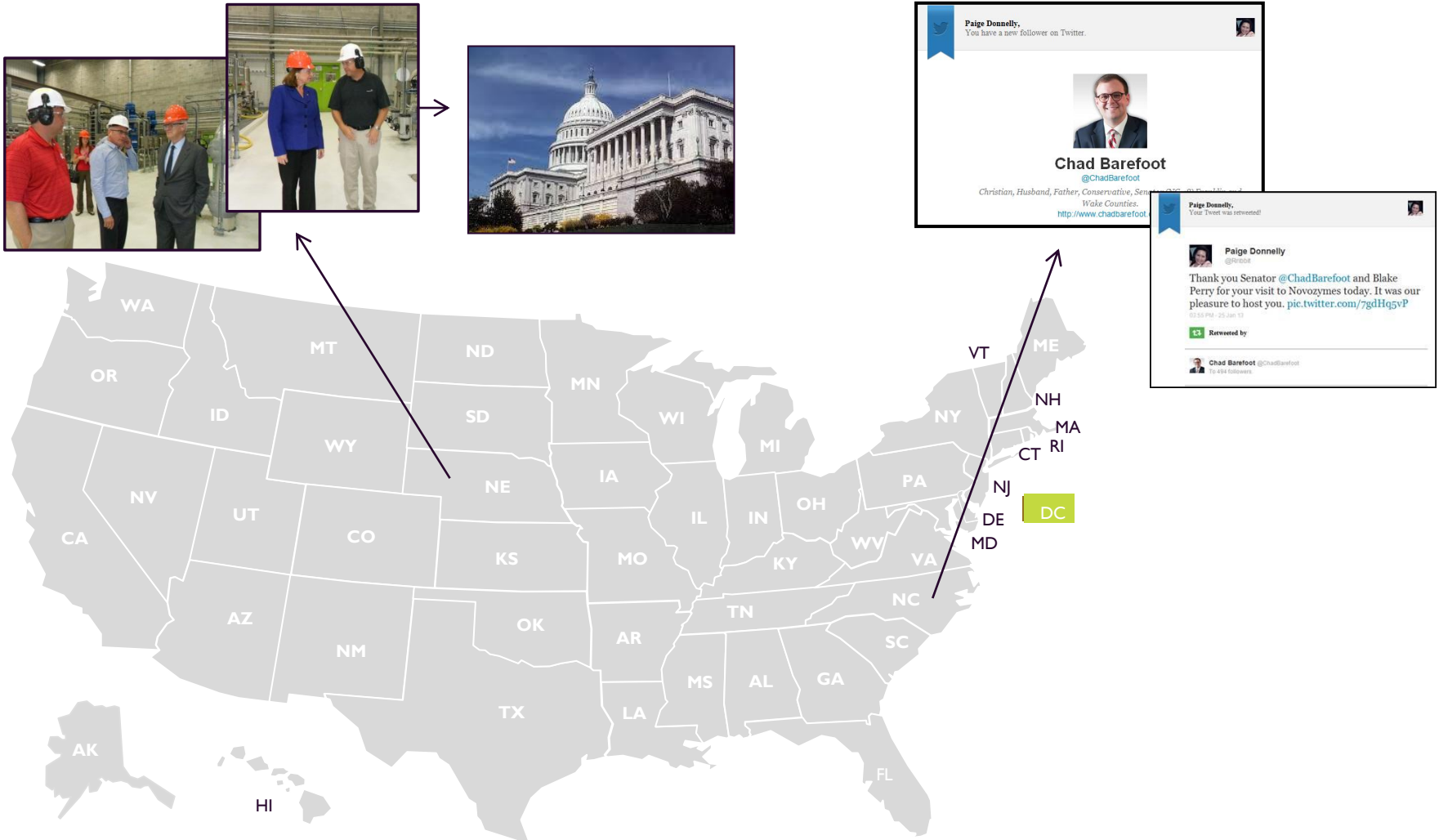
How our Regional PA/Comm work evolved

Two years ago, much of our PA/Comm focused was in DC.

In 2013, to better leverage our sites and relationships, and to account for Congress' partisanship, we began putting more focus on regional work.



There's no substitute for presence and engagement



Putting drivers to work in our portfolio

We work to understand the external forces affecting our business, focusing on the drivers

We seek input from LoB about its needs

We test for unique PA/Comm impact and business relevance and alignment

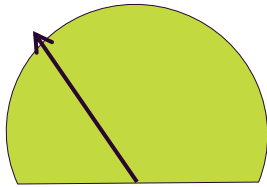
We finalize a PA/Comm portfolio rooted in business impact

We assess quarterly to ensure our portfolio reflects current drivers and conditions



You will rise or fall on your narrative.

Stories move policy.



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Get the facts from Fuels America

email address zip code **JOIN US**

THE ISSUE THE FACTS TAKE ACTION BLOG

HOW FARMERS ARE FEEDING & FUELING THE COUNTRY

WATCH NOW

Read our statement on EPA's 2014 Renewable Volume Obligations (RVOs)

3 Graphs That End The 'Food vs. Fuel' Debate

Bipartisan Group of 31 Senators Urges EPA To Revise RFS Proposal





*in cooperation with
Rep. Lee Terry (R-NE) and Rep. Bruce Braley (D-IA)
invites you to a briefing:*

***“What’s Really Happening...
with the so-called ‘Blend Wall’?”***

Thursday, July 11th
12:00 – 1:15pm
CVC 268

This will be a widely attended event and a box lunch will be served



A lot can happen in 5 weeks.

Since Congress left town for the August recess, the renewable fuel world has been humming with activity...proving once again that the rhetoric from the oil sector about the Renewable Fuel Standard (RFS) just doesn't reflect reality.

EPA uses RFS flexibility, releasing adjusted 2013 volumes; extending compliance period by 4 months; announcing plans for further adjustments in 2014.

FTC moving toward investigation of oil industry's efforts to block consumer access at the pump

Despite hardship claims, **oil sector earnings reports reveal no impact on bottom line from RIN prices**

Analysis shows **RIN prices appear to rise and fall with Congress' hearing schedule**

Cellulosic produced at commercial volumes at INEOS Bio's facility in Vero Beach, FL

THE WALL STREET JOURNAL.
 U.S. EDITION Wednesday, August 21, 2013 As of 7:52 PM EDT

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Noose Tightens on Brazil's OGX
 Marc Jacobs May Leave Vuitton
 GM Succession Sets Up Game of Thrones
 Merck to Cut St by 20%

BUSINESS | Updated August 21, 2013, 7:52 p.m. ET

FTC Examines Allegations That Oil Industry Blocks Greater Ethanol Use

From: ☐ Jack Krumholtz <jkrumholtz@gloverparkgroup.com> Sent: Mon 8/26/2013 11:38 AM
 To: ☐ Fuels America GR
 Cc: ☐ Internal Fuels America GR
 Subject: Re: Klobuchar, Grassley Call on Justice Department and Federal Trade Commission to Investigate Allegations of Possible Anticompetitive Practices by Oil Companies that Hurt Consumers

Contact:

Brigit Helgen (Klobuchar), 202-228-6317
 Beth Levine (Grassley), 202-224-6197

Klobuchar, Grassley Call on Justice Department and Federal Trade Commission to Investigate Allegations of Possible Anticompetitive Practices by Oil Companies that Hurt Consumers

Recent concerns indicate that oil companies may be taking steps to undermine efforts to distribute renewable fuels, including higher level ethanol blends, that help boost energy security and lower the price of gas for consumers

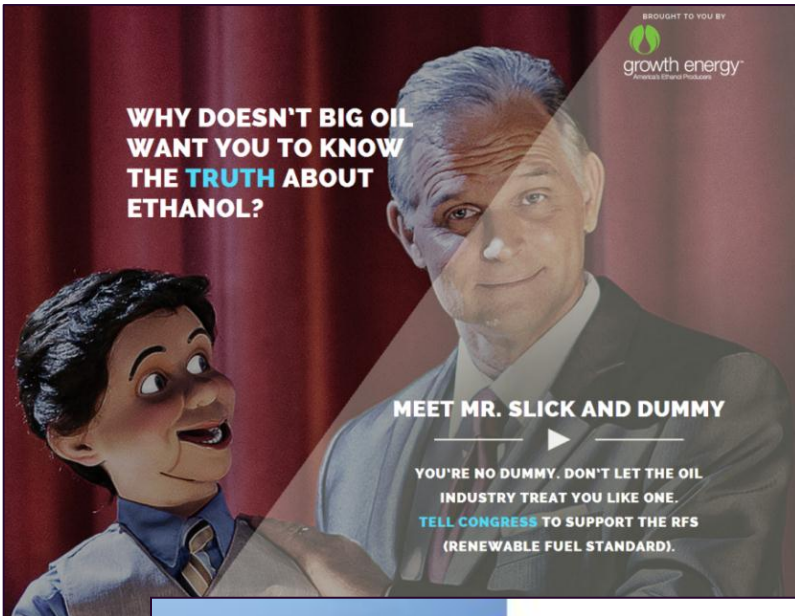
Washington, D.C. — U.S. Senators Amy Klobuchar (D, MN) and Chuck Grassley (R-IA) called on the Justice Department and Federal Trade Commission (FTC) to investigate possible anticompetitive practices by oil companies that limit consumers access to homegrown renewable fuels. In a letter to Attorney General Eric Holder and FTC Chairwoman Edith Ramirez, Klobuchar, the chair of the Antitrust Subcommittee, and Grassley, the ranking member of the Judiciary Committee, urged the Administration to take action to address recent reports indicating that oil companies may be undermining efforts to distribute renewable fuels, including higher ethanol gasoline blends, that help boost our nation's energy security and lower the price of gas for consumers.

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growth energy
America's Ethanol Producers

WHY DOESN'T BIG OIL WANT YOU TO KNOW THE TRUTH ABOUT ETHANOL?

MEET MR. SLICK AND DUMMY

YOU'RE NO DUMMY. DON'T LET THE OIL INDUSTRY TREAT YOU LIKE ONE.
TELL CONGRESS TO SUPPORT THE RFS (RENEWABLE FUEL STANDARD).



Oil industry presses White House, Congress to scrap RFS

Jason Plautz, E&E reporter

Published: Thursday, April 18, 2013

Executives from 10 refining companies and two major oil industry groups met yesterday with Obama administration officials and members of Congress to urge them to set aside the renewable fuel standard biofuels mandate.

American Petroleum Institute President and CEO Jack Gerard and American Fuel & Petrochemical Manufacturers President Charles Drevna led the group at meetings aimed at rolling back the RFS mandate of blending 36 billion gallons of biofuel into gasoline by 2022.

"We are joining a growing chorus of concerned groups urging Congress to repeal the renewable fuel standard before the mandate potentially puts consumers in harm's way, hurts the economy and disrupts the nation's fuel supply," Gerard said.

Story Tools sponsored by Nuclear Energy Institute

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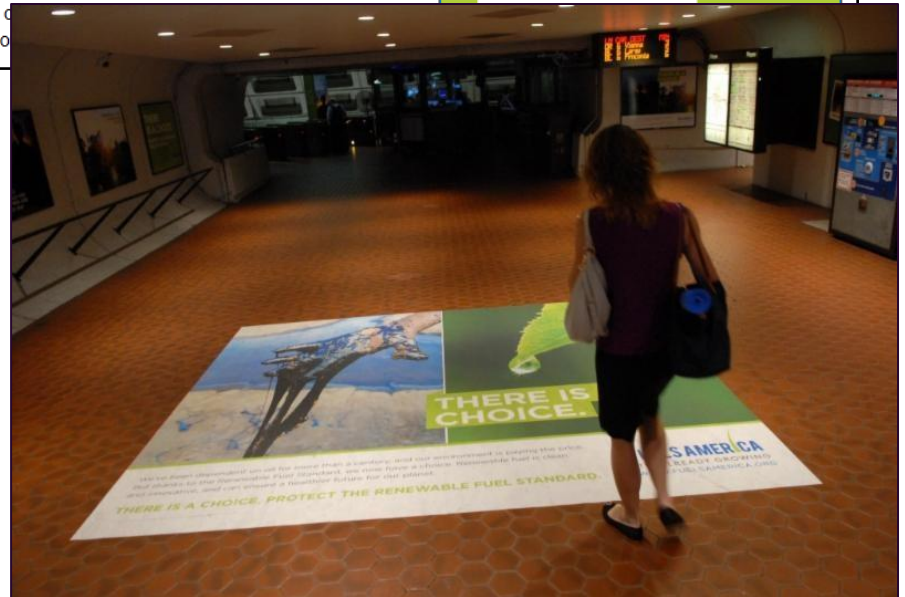


THERE IS A CHOICE.



THERE IS A CHOICE.

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IT'S ALREADY GROWING



The Higher Ethanol Mandate



*It Could Mean Big Trouble
For Your Small Engine.*

The mandate for higher levels of ethanol in gasoline can cause devastating corrosion to the small engines that power our lives. From our boats¹, to our snowmobiles, to the lawn and garden equipment² in our garage.

 **Fuel for Thought**

Tell Congress to repeal the renewable fuel standard, visit FillUpOnFacts.com.

api.org



Fox
April 21

FEED FOOD FAIRNESS

TAKE RFS OFF THE MENU

Support the repeal of the RFS. Join chain restaurants in supporting Feed Food Fairness.

[SPREAD THE WORD](#)

THE RFS DRAMATICALLY INCREASES FOOD PRICES FOR CHAIN RESTAURANTS & CONSUMERS

BEEF +7.5% CHICKEN +7.7% PORK +15% POTATOES +13% CORN PRODUCTS +26% OVERALL +10%*

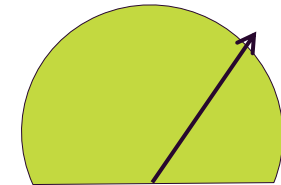
* PwC STUDY, NOVEMBER 2012



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DON'T LET BIG OIL RIG THE SYSTEM. GET THE FACTS ABOUT RENEWABLE FUELS **FUELS AMERICA** IT'S ALREADY GROWING PAID FOR BY FUELS AMERICA

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CHRISTIE RIPS COLORADO 'HEAD SHOPS'

Court duel: Startup vs. broadcasters
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POLITICOMAGAZINE

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By JOHN ALOYSIUS FARRELL


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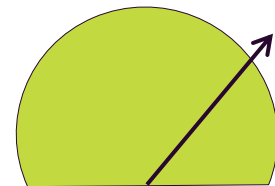
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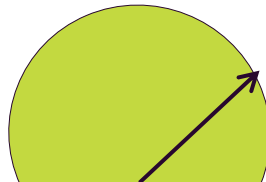
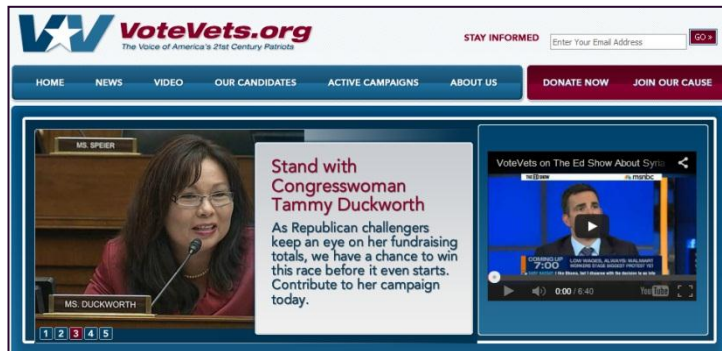
Fox
CNN
MSNBC
April 22 – May 2



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Making the RFS a 2014 election issue and creating state-level impact

Cedar Rapids Gazette
April 11



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Standing for Renewable Fuels Means Standing with America's Consumers, Farmers and Veterans

With 41 ethanol plants and 18 biodiesel plants, Iowa leads the nation in renewable fuel production. The renewable fuel industry supports more than 62,000 Iowa jobs and provides \$4 billion in income for Iowa families.

As military veterans, we have a question for the potential presidential candidates: where do you stand on President Bush's commonsense Renewable Fuel Standard? After all, the more fuel we produce here in the Midwest means less we have to buy from dangerous parts of the world like the Middle East.

Oil imports damage more than our economy and our environment – they also put our national security at risk. Our oil addiction drives up the price of oil around the world and lines the pockets of the regime in Iran and others who fund and sponsor terrorism – whether we buy directly from them or not. That's why more than 120,000 Americans – including thousands here in Iowa, and veterans and military families from around the country – signed VoteVets' petition earlier this year to protect the bipartisan Renewable Fuel Standard.

So where do they stand?

 Mike Huckabee Former Governor, AR Supports the RFS	 Rick Santorum Former Senator, PA Supports the RFS	 Rick Perry Governor, TX Opposes the RFS	 Ted Cruz Senator, TX Opposes the RFS	 Paul Ryan Congressman, WI Opposes the RFS
 Rand Paul Senator, KY Position Unclear	 Chris Christie Governor, NJ Position Unclear	 Bobby Jindal Governor, LA Position Unclear	 Jeb Bush Former Governor, FL Position Unclear	 Marco Rubio Senator, FL Position Unclear
 Scott Walker Governor, WI Position Unclear				

Read for by VoteVets Action Fund

Wrap-up points

- For internal and external success, root PA/Comm portfolio in business needs.
- Turning drivers into compelling and emotional narrative is critical.
- Bring state networks and connections into the action for full circle impact:
 - Bringing plant workers to DC
 - Getting officials to your facilities
 - Letters and videos from plant workers to elected officials
 - Asking tough questions – and expecting good answers – of candidates and current officials

Thank you!

Let's talk questions, comments and ideas.