• A competitive bioenergy value chain is made of hundreds of public and private decisions.

• Goods and Service with more competitive value chains have better market access.

• Strategy, structure and institutional environment or culture are the three key dimensions of a bioenergy value chain.
Bioenergy Value Chains

Governments & Public Sector

- Research & Development
- Farm Supplies
- Farming & Agriculture
- Industry & Fuel production
- Trade & Market access

Institutions

Community/Public Opinion / Press

Power generation
- Transport Fuels
- Industry
- Residential Energy
## Value Chain Alignment

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Institutional Culture</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Based on Relations</td>
<td>• Communication</td>
</tr>
<tr>
<td>• Common Goals</td>
<td>• Negotiation</td>
</tr>
<tr>
<td>• Public-Private</td>
<td>• Consensus</td>
</tr>
<tr>
<td>• Competitive Advantages</td>
<td>• Trust</td>
</tr>
</tbody>
</table>
Main Challenges

**Domestic**
- Public-Private coordination
- Value chain strategy
- Market Access
- Inflation
- Investments
- Technology
- Consumer perception and choice
- Exchange rate
- Social & economic development

**International**
- GHG emissions reduction
- Efficient Global Markets
- Foreign investments
- New trade barriers based on:
  - GHG emissions
  - ILUC
  - Indirect effects
  - Food vs fuels
  - Certification schemes
  - Environmental debate
  - Biotechnology
  - Agchemicals
Thank you,

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