

University of Wisconsin-Madison



EcoCite
Biodiesel

2020 Executive Summary

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INTRODUCTION

Wisconsin is America's Dairyland, recognized nationally as a leader in the dairy industry, with nearly 7,000 dairy farms¹ generating 10 billion gallons of liquid manure each year. As the number of farms declines daily due to challenging economic times, dairy farmers are seeking new income sources.

Agriculture accounts for nine percent² of total greenhouse gas emissions nationally, yet farming requires millions of gallons of diesel, contributing to the rise in carbon emissions. Primary research indicates that 81 percent of Wisconsin farmers believe that sustainability is very-to-extremely important and the need for innovative solutions is essential. Accounting for five percent of farmers' overall costs, fuel is damaging profit margins at a time when farm income is already half that of 2013.³

Transportation is the largest contributor to greenhouse gas emissions at 29 percent.⁴ Fifty percent of U.S. consumers say they would definitely or probably change their consumption habits to reduce their impact on the environment.⁵ Consumers realize they are part of the problem and actively respond to sustainability messaging, driving more eco-friendly lifestyle choices. Farmers and consumers have attempted to mitigate their carbon footprint with diesel alternatives, but none have proven commercially viable long term, until now.

Through the introduction of EcoCite Biodiesel, GreenField Cooperative will add a new chapter to agriculture's sustainability story. EcoCite is created through hydrothermal liquefaction, a process in which biomass – in this case, manure – in the presence of hot, compressed water is converted into liquid bio-crude and then filtered and refined to biodiesel.



Ready to use in all diesel engines, EcoCite is the only commercially available, carbon-neutral and renewable biodiesel whose main input is livestock manure. The introduction of EcoCite Biodiesel will generate over \$17 million in producer return from the sale of excess manure not used as field-applied fertilizer, and enable reductions to agriculture's carbon footprint.

GreenField is an established cooperative that provides agronomy, animal nutrition and energy products and services. Headquartered in Denmark, Wisconsin, this 45-year-old cooperative serves 9,000 members across the state. The in-house marketing team has developed a marketing plan for EcoCite Biodiesel that is designed to raise brand awareness and produce strong financial returns through year three and beyond.

MARKET ANALYSIS

MARKET TRENDS - AGRICULTURE

- A 200-cow dairy produces as much nitrogen as the sewage produced by a community of 8,400 people.⁶
- Wisconsin has 7,000 dairy farms and 1.3 million cows generating more than 10 billion gallons of liquid manure annually.⁷
- Midwest farmers with an average of 221 acres⁸ of land use an estimated 1,100 gallons of diesel⁹ per year.
- Ninety-six percent and 34 percent of farmers learn about new products from sales representatives and trade shows, respectively.¹⁰
- Fifty-six percent of farmers listen to digital radio advertisements¹⁰ and seventy-nine percent of farmers said that radio was a leading source for daily agricultural news.¹¹
- Seventy-nine percent of farmers read magazine advertisements and 40 percent of farmers learn about new products through direct mail.¹²
- Fifty-eight percent of farmers listen to podcasts on a regular basis.¹⁰
- Forty-six percent of U.S. farmers use Facebook, nine percent use Twitter and five percent use Instagram.¹²

MARKET TRENDS - CONSUMER

- Wisconsin diesel drivers use an average of 350 gallons of fuel annually.¹³
- Seventy-two percent of Generation Z and Millennials follow social media influencers.¹⁴
- Diesel-powered vehicles account for three percent of total vehicle sales in Wisconsin.¹⁵
- Wisconsin 2019 clear diesel sales were 23 percent of total gasoline consumption at the pump.¹⁶
- Sixty-two percent of Wisconsin residents ages 35-65 are active on Facebook¹⁷ and 38 percent listen to podcasts.¹⁸
- Seventy-one percent of Instagram users are under the age of 35.¹⁹

AUDIENCE PROFILES

Gary Green and Gracie Grower

Gary Green, a 60-year-old farmer, and his daughter, Gracie Grower, a 29-year-old herdswoman, represent the family's fourth and fifth generations on their 2,500-cow dairy in Manitowoc, Wisconsin.



- Increasingly tight margins have forced them to seek more financially sustainable ways to fuel their operation.
- They need a long-term solution to alleviate excess manure storage challenges.
- Gary and Gracie are active in several Midwest dairy associations and serve on their boards.
- Gary enjoys connecting with fellow farmers at the local diner.
- Gracie advocates for agriculture on social media and is involved in her county Farm Bureau.
- They receive new product information from sales representatives and via email marketing, regional agriculture publications and social media.



Frank Forward

Frank Forward, a 65-year-old vegetable farmer runs 22,000 acres in the Central Sands region of Wisconsin and is not yet a member of GreenField Cooperative.

- Groundwater contamination is a continual challenge in the sandy soil of the Central Sands.²⁰
- Frank uses 110,000 gallons of diesel annually and is looking for a more affordable and sustainable fuel.
- He is looking to offset market volatility in the cost of one of his largest inputs so he can contract with confidence.
- Frank appreciates visits from sales representatives, regularly reads regional agriculture publications and tunes in to the local radio station.

Erika Eco

Erika Eco, a 46-year-old project manager, lives in Mineral Point, Wisconsin and commutes 40 miles to work at Epic Systems in Verona, Wisconsin.



- She is a graduate of the University of Wisconsin-Madison College of Agricultural and Life Sciences and reads the alumni publication, GROW.
- Erika appreciates the convenient locations of GreenField Cooperative's fueling stations and stops there to refuel her BMW 540 diesel.
- She listens to sustainability podcasts and values the opinions of lifestyle influencers on Facebook and Instagram.

MANURE-TO-BIODIESEL PROCESS



NEED FOR PRODUCT

GreenField Cooperative recognizes that common negative perceptions surrounding agriculture and sustainability exist among consumers. Agricultural waste can lead to runoff into waterways and groundwater contamination while emitting greenhouse gases. Globally, animal agriculture accounts for an estimated nine percent of carbon dioxide emissions, 40 percent of methane emissions and 65 percent of nitrous oxide emissions.²³ Recently, the Department of Agriculture (USDA) stated that broader biofuel use was one of the four objectives of its "innovation agenda" to increase agricultural production by 40 percent while reducing agriculture's environmental impact by half.²⁴ The Environmental Protection Agency reports that nearly 60 percent of greenhouse gas emissions are generated by transportation and electricity collectively.²⁵ EcoCite Biodiesel provides energy security and is safer to handle than petroleum-based diesel due to low volatility.²⁶ EcoCite Biodiesel appeals to farmers and consumers who are looking for sustainable fuel solutions to minimize their carbon footprint.

MARKET SIZE

The primary target audience for EcoCite Biodiesel consists of farmers in three Wisconsin regions. There are more than 40,000 farms in this audience, and of that, the target market consists of those using an annual average of 1,100 gallons of diesel fuel.²¹ The secondary target audience consists of individuals who drive diesel-powered vehicles in Wisconsin. There are about 161,000 registered vehicles in the target audience.²² This target market consists of drivers who use an annual average of 350 gallons of diesel fuel.

MARKET POTENTIAL

Diesel engines power more than two-thirds of all farm equipment, transport 90 percent of farm product and pump one-fifth of on-farm water, leading to high input costs.²⁷ Primary research indicates that nearly 81 percent of farmers strongly believe that sustainability is very-to-extremely important. Coincidentally, 81 percent of respondents to a sustainability survey feel strongly that companies should help improve the environment.²⁸ Three percent of vehicles registered in Wisconsin run on diesel, creating additional market opportunity.²⁹

COMPETITIVE ANALYSIS

GreenField Cooperative will introduce the only commercially available, carbon-neutral and renewable biodiesel for use in the target region. This non-blended, manure-powered fuel is a low-cost option for diesel users, adding value to GreenField Cooperative members through a new market segment.

DIRECT COMPETITORS

PRICE

EcoCite Biodiesel's direct competitors are diesel fuels sold by cooperatives such as Landmark, United and Premier, as well as by independent fuel suppliers like Quality State Oil.

**Competitor prices are based on 2019 averages.*

Landmark Services Cooperative	\$2.69 ⁹ /gallon
United Cooperative	\$2.69 ⁹ /gallon
Premier Cooperative	\$2.69 ⁹ /gallon
Quality State Oil Co., Inc.	\$2.69 ⁹ /gallon
EcoCite Biodiesel	\$1.99 ⁹ /gallon

INDIRECT COMPETITORS

PRICE

Indirect competitors include plant-based biodiesel, hybrid and electric vehicles, propane autogas and ethanol.

**Competitor prices are based on 2019 averages.*

Plant-based Biodiesel	\$2.28 ⁹ /gallon
Hybrid and Electric Vehicles	\$2.64 ⁹ /full charge
Propane Autogas	\$2.76 ⁹ /gallon
Ethanol	\$2.28 ⁹ /gallon
EcoCite Biodiesel	\$1.99 ⁹ /gallon

STRENGTHS

- First-to-the-market.
- Ready to use in all diesel engines.
- Stable market price compared to competitors.
- Carbon-neutral.
- Alleviates manure storage challenges.
- Sustainable and renewable.
- Non-blended biodiesel.
- Low input cost = low product price.
- Low risk of flammability.
- Converts waste product into resource.

WEAKNESSES

- Low product awareness.
- Negative perception of livestock waste.
- Saturated diesel market.
- High start-up cost.

OPPORTUNITIES

- License the proprietary process.
- Rising demand for sustainable and renewable products.
- Expand into additional diesel fuel markets.
- Enhance consumer understanding of renewable fuels and sustainable agriculture.
- Improve farm nutrient management planning to offset groundwater contamination.

THREATS

- Development of new biodiesel and shadow products.
- Electric and hybrid vehicles.
- Flooding that causes manure runoff leading to difficulty of collection.
- Extenuating circumstances causing unfavorable market volatility (e.g., COVID-19).
- Anti-agriculture activists.
- Increasing popularity of methane digesters.



BUSINESS PROPOSITION

EcoCite Biodiesel is the only commercially available biodiesel derived from livestock manure. This product is a carbon-neutral and renewable fuel source for on-farm and consumer use.

PLANNING ASSUMPTIONS

- 1 GreenField Cooperative holds the patent for a proprietary hydrothermal liquefaction process that produces a homogenous bio-crude to be used in the production of EcoCite Biodiesel.
- 2 EcoCite is an EPA-registered, non-blended biodiesel with the same properties as petroleum-based diesel, is safe to mix with standard diesel and will not void manufacturer warranties. It is certified for use in equipment manufactured by all farm implement brands. EcoCite is a renewable fuel that meets all federal laws pertaining to biodiesel.
- 3 GreenField Cooperative has purchased the necessary equipment and has excess production space and storage capacity that will be used to process, store and sell EcoCite Biodiesel.
- 4 GreenField Cooperative is a Certified B Corporation, producing sustainable products.
- 5 GreenField Cooperative partnered with the Wisconsin Energy Institute and the Dairy Innovation Hub at the University of Wisconsin-Madison to fund the research and development of the proprietary process.

GOALS BY END OF YEAR THREE



BRAND AWARENESS IN THE TARGET REGIONS

- **Agriculture Industry:** Achieve 40 percent aided and 20 percent unaided brand awareness.
- **Consumer Industry:** Achieve five percent aided and one percent unaided brand awareness.



NEW-MEMBER ACQUISITION

- Achieve six percent new-member acquisition.



MARKET SHARE IN THE TARGET REGIONS

- Achieve one percent share of the diesel fuel market and 33 percent of the biodiesel market.



PROFIT

- Achieve **\$6 million** profit by the end of year three.

ACTION PLAN

OBJECTIVES

- Initiate disruption in the diesel fuel industry.
- Set the Midwest standard for sustainable and renewable fuel production.
- Inspire and promote change across the agricultural industry.
- Make the sustainable choice the easy choice for consumers.

POSITIONING STATEMENT

For sustainability-conscious farmers and consumers in Wisconsin, EcoCite is the only commercially available, carbon-neutral and renewable biodiesel, sourced solely from livestock manure using a proprietary process to produce a superior method to fuel the future.

PRODUCT

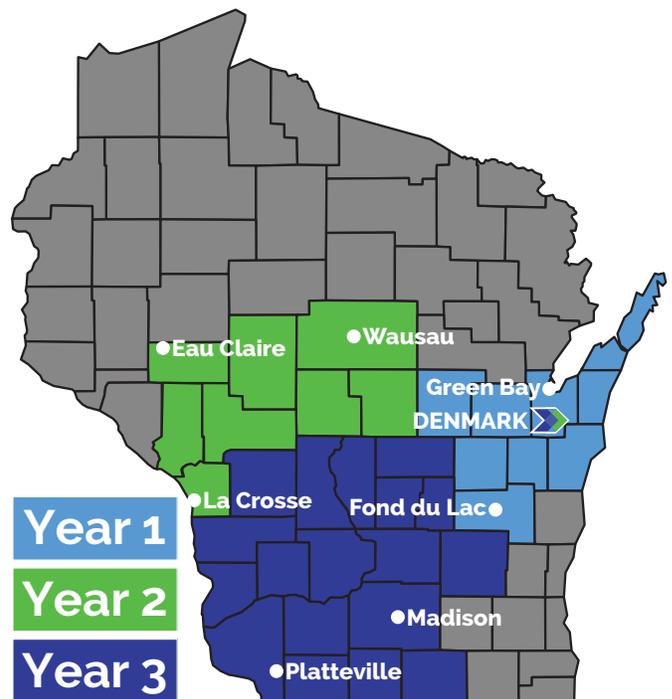
EcoCite Biodiesel will be sold by the gallon and is available at GreenField Cooperative convenience stores and for delivery to farms. The product will be delivered in EcoCite Biodiesel-branded trucks.

PRICE



\$1.99⁹ Per Gallon

PLACEMENT



CAMPAIGN

The **Fuel for the Future** campaign will use the tagline, **Fuel Forward**, to promote the carbon-neutral, renewable EcoCite Biodiesel through thoughtful strategies and tactics. The campaign will work to engage the target audiences and establish brand awareness.



PRODUCT LAUNCH

EcoCite Biodiesel will be made available to GreenField Cooperative's members six months prior to the official launch. This soft launch period will serve as a time for these members to test the product, generate testimonials and build buzz surrounding its launch. EcoCite Biodiesel will be made commercially available to farmers and consumers through their respective sales channels following GreenField Cooperative's annual sales meeting.



Soft Launch

EcoCite Biodiesel will be made available for member trial on June 1, 2020.



Hard Launch

Following GreenField Cooperative's annual sales meeting December 7-9, 2020, sales personnel will hit the ground running and sell to their customers.



Year 1

In year one, EcoCite Biodiesel will be made commercially available in the East Central Region of Wisconsin.



Year 2

In year two, EcoCite Biodiesel will be made commercially available in the West Central Region of Wisconsin.



Year 3

In year three, EcoCite Biodiesel will be made commercially available in the Southwest Region of Wisconsin.

The following strategies and tactics will be implemented to achieve the campaign objectives.

TAGLINE

The tagline, **Fuel Forward**, builds on the Wisconsin Idea and emphasizes that GreenField Cooperative is an innovative leader that positively impacts the environment by disrupting the diesel industry with EcoCite Biodiesel. This tagline will serve as the unifying theme as EcoCite Biodiesel deploys inbound marketing to attract, engage and delight its target audience.

BOOTS ON THE GROUND

Prior to product launch energy sales personnel will receive training about EcoCite Biodiesel, acquiring the necessary skills to attract interest in the product. They will call on farmers and host cooperative-member meetings to inform them about EcoCite Biodiesel and its potential to provide both income and cost savings. All sales representatives will drive diesel-powered vehicles.

GreenField Cooperative will partner with area dealerships that sell diesel vehicles to introduce EcoCite Biodiesel and invite customers to enter a drawing to win a year's worth of the product and a diesel-powered vehicle.

CUSTOMER RELATIONSHIP MANAGEMENT

GreenField Cooperative uses Salesforce to attract, engage and delight agriculture customers. As a way to add value, GreenField Cooperative offers its farmers a complimentary cloud-based fuel monitoring system.

TRADITIONAL MEDIA AND DIRECT MAIL

EcoCite Biodiesel will place ads in select agricultural and consumer-facing publications and on regional radio stations. Direct mail pieces that introduce EcoCite Biodiesel and offer incentive to trial will be sent to existing cooperative members.

EARNED MEDIA

To raise awareness, EcoCite Biodiesel will deploy earned media tactics targeting agricultural and consumer-facing publications and regional television and radio stations. Pitches will highlight the product's ability to promote change, inspiring the target audience to make the economical and sustainable choice.

CONTENT MARKETING

GreenField Cooperative will raise awareness for EcoCite Biodiesel through its existing web, digital and social media platforms. To expand social media reach, GreenField Cooperative will collaborate with Wisconsin agriculture promotion boards to create and launch strategic campaigns. Podcast sponsorships and ads placed on Spotify, Facebook, Instagram and Twitter will target both the agriculture and consumer audiences. Additionally, EcoCite Biodiesel will be promoted in the cooperative's daily, commodity-price text updates.

INFLUENCERS

Social media influencers will promote EcoCite Biodiesel using the branded, #FuelForward hashtag. They will share the ways EcoCite Biodiesel positively impacts their bottom line, and is a renewable fuel source for all farming operations. Unpaid influencers include farmers who use EcoCite Biodiesel to fuel their operations and talk about it with their farmer friends.

Lifestyle influencers will promote EcoCite Biodiesel as an environmentally friendly fuel alternative and a sustainable option for reducing their carbon footprint. Their messages will reinforce that the choices consumers make at the pump can have a lasting impact for generations to come.

All paid influencers will be compensated in EcoCite Biodiesel.

TRADE SHOWS

EcoCite Biodiesel will be featured at select regional agricultural and consumer trade shows to promote sales, inspire change and set the Midwest standard for sustainable and renewable fuel production.

OUTBOUND EDUCATION AND SPONSORSHIP

To promote the sustainable choice as the easy choice for consumers, GreenField Cooperative will share educational information on social media using the branded #FuelForward hashtag and capitalize on sustainability opportunities to further product awareness. EcoCite Biodiesel will leverage sponsorship opportunities, including funding the Alice in Dairyland program vehicle, to increase awareness among all audiences.

AWARDS

EcoCite Biodiesel will compete for awards, such as the Energy Efficiency Excellence Award presented by Focus on Energy, to highlight the innovation and sustainability of the product, encouraging adoption within the audiences.



FINANCIALS

Using a five-to-one manure-to-fuel ratio, GreenField Cooperative will purchase 98 million gallons of excess livestock manure from area cooperative members by the end of year three at a cost of 18 cents per gallon. Using this manure as the main component of EcoCite Biodiesel, by the end of year three, GreenField Cooperative will generate **\$17 million** of direct producer return through the purchase of the raw input. Additionally, GreenField Cooperative members receive annual cooperative dividends that will include a two percent contribution from EcoCite Biodiesel profits. Indirect returns are generated by solving the manure storage and disposal challenge.

Strong net sales that account for a cost of goods sold of \$1.16 per gallon will drive a healthy margin of return for EcoCite Biodiesel. It is important to note that the discounts for marketing incentives are accounted for in net sales on the income statement but

MARKETING EXPENSES	YEAR 1	YEAR 2	YEAR 3
Sales Personnel	\$272,180	\$444,222	\$733,238
Boots on the Ground	\$49,000	\$60,000	\$74,500
Traditional Media	\$418,524	\$861,124	\$1,359,099
Content Marketing	\$27,000	\$46,000	\$69,000
Influencers	\$43,000	\$65,000	\$150,000
Incentives	\$44,483	\$53,529	\$124,714
Trade Shows	\$32,450	\$67,450	\$132,450
Outbound Education/ Sponsorship	\$129,982	\$168,982	\$253,982
Miscellaneous	\$80,000	\$165,000	\$425,000
Total Marketing Expenses	\$1,096,619	\$1,931,307	\$3,321,983

reflected in the marketing graph as well. By the end of year three, EcoCite Biodiesel will realize a profit margin of 27 percent and net profit of more than \$6 million.

INCOME STATEMENT	YEAR 1	YEAR 2	YEAR 3
Member Farms	\$2,358,212	\$5,549,702	\$12,993,667
Non-Member Farms	\$1,478,561	\$3,479,575	\$8,146,823
Consumers	\$925,548	\$1,513,864	\$2,767,563
Gross Sales	\$4,762,322	\$10,543,142	\$23,908,054
Discounts -- Incentives	\$44,483	\$53,529	\$124,714
Net Sales	\$4,717,838	\$10,489,613	\$23,783,340
Manure Input	\$2,144,117	\$4,746,787	\$10,764,006
Direct Labor	\$249,600	\$312,000	\$374,400
Sodium Bicarbonate	\$9,324	\$20,642	\$46,808
Delivery Cost	\$441,450	\$1,038,886	\$2,432,373
Total COGS	\$2,844,490	\$6,118,315	\$13,617,587
Gross Margin	\$1,917,831	\$4,424,826	\$10,290,467
Operating Expenses	\$694,737	\$463,074	\$717,290
Marketing Expenses	\$1,052,136	\$1,877,778	\$3,197,269
Total Expenses	\$4,591,363	\$8,459,168	\$17,532,146
Net Profit	\$170,959	\$2,083,974	\$6,375,908
Profit Margin	4%	20%	27%
GF Dividend Contribution	\$3,419	\$41,679	\$127,518

MONITORING & MEASURING

GOAL

BRAND AWARENESS

Agriculture: 40% Aided, 20% Unaided
Consumers: 5% Aided, 1% Unaided

MEMBER ACQUISITION

6% of Farms in Region

MARKET SHARE

1% of Diesel Fuel
26% of Biodiesel

PROFIT

\$6 million

HOW?

- Google Analytics.
- Salesforce.
- Qualitative and quantitative tools.
- Meltwater.
- Clarabridge.
- New-member application.
- Regional sales reports.
- Monthly, quarterly and annual reports.
- Industry trends.
- Fuel consumption growth against industry baseline.
- Monthly, quarterly and year-end reports.
- Inventory movement reports.
- Salesforce.

IF MORE

- Fully saturate the diesel fuel market in the target region.
- Expand geographic reach.
- Expand geographic reach.
- Expand geographic reach.
- Referral program.
- Explore opportunities in the commodities market.
- License exclusive proprietary process, use of brand name.
- Broaden investment in research and development.
- Accelerate plans to scale.

IF LESS

- Expand marketing budget.
- Redefine need for product, revise messages.
- Create greater consumer pull.
- Introduce referral loyalty program.
- Expand promotion to non-cooperative members.
- Increase sales personnel on-farm visits.
- Evaluate and refine sales goals and marketing strategies.
- Review pricing strategy.
- Incentivize sales personnel.

CRISIS PLAN

➤ **External** -- For cases of spills, fires, explosion, etc.

➔ **Report** spills, leaks, fires, etc. to Safety Manager for appropriate actions.

➔ **Respond** quickly to those affected, provide 24-hour crisis hotline and issue a public statement.

➤ **Internal** -- For cases of extreme weather, regional livestock disease outbreak, etc. where input may be difficult to collect or unusable, extenuating circumstances leading to unfavorable market volatility.

➔ **Proactive farmer support** ➔ **Reduce production**

➔ **Healthy margin** supports flexibility in price to enable proactive response.



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