



MOORE INFORMATION

OPINION RESEARCH • STRATEGIC ANALYSIS

December 14, 2009

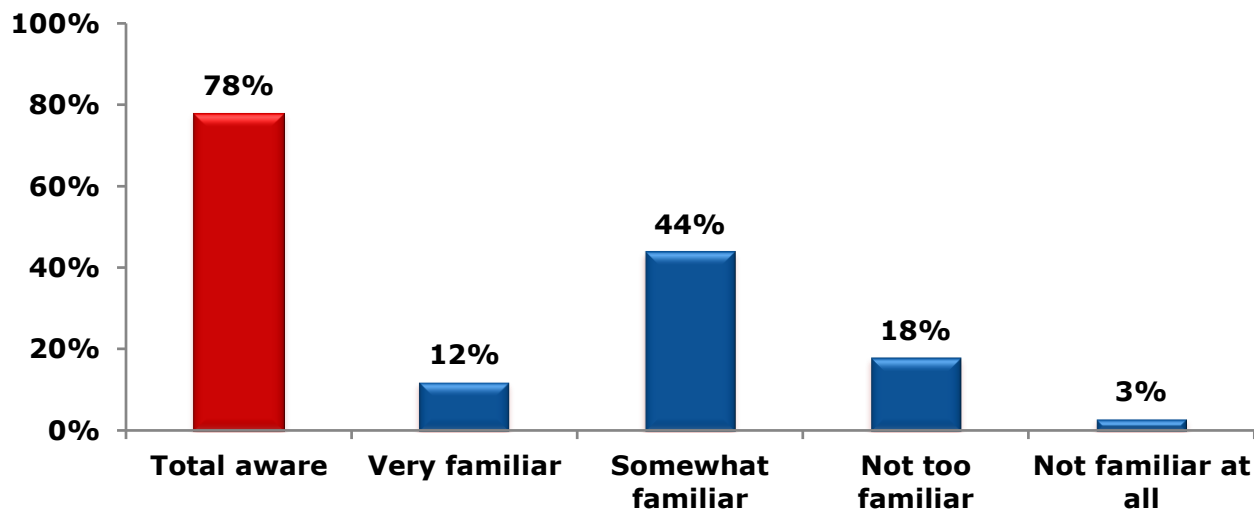
Methodology

This memo contains the results of a telephone survey conducted among voters in Iowa. A total of 500 interviews were conducted December 2-3, 2009, by Moore Information, Inc. The sampling error associated with this survey is plus or minus 4% at the 95% confidence level.

Awareness of Biodiesel

Today, a wide majority of Iowa voters are aware of biodiesel. Nearly eight-in-ten (78%) have heard of the product. For those aware of biodiesel, 12% say they are "very" familiar, 44% are "somewhat" familiar, 18% are "not too" familiar and just 3% say they are "not familiar at all" with biodiesel.

Awareness of Biodiesel



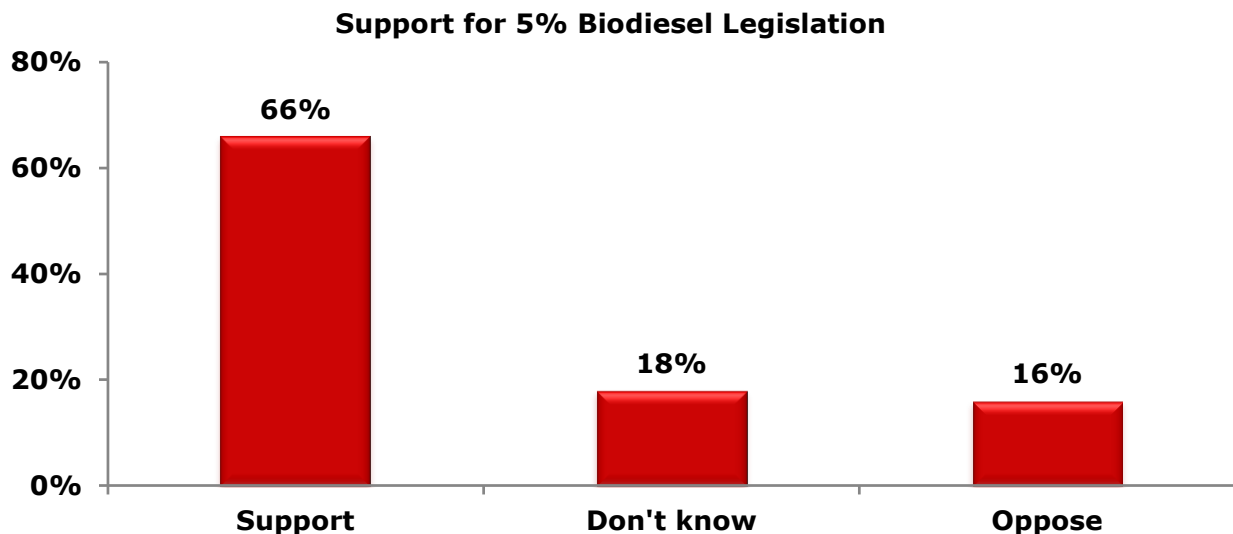
Looking at subgroups, those most likely to be aware of biodiesel include:

- Voters in the 4th and 5th Congressional Districts (Western Iowa)
- Men
- Voters age 35-64
- Diesel vehicle owners/drivers
- Households earning more than \$50,000 annually
- Households where more than 50% of income relies on farming or agriculture

We asked those aware of biodiesel for their impression of the product. Fully 60% of Iowa voters have a positive impression of biodiesel and only 6% have a negative impression. Another 24% have yet to form an opinion about biodiesel and the remaining 9% were unsure. By subgroup, those most impressed include residents in the Sioux Falls/Sioux City/Omaha, and Des Moines media markets. By Congressional District, we find voters in Iowa's First District, while still positive, are not as impressed as voters in the other four districts. Men are more impressed than women and voters age 45-54 are more impressed than older and younger voters. By party, Independents are more impressed than Democrats or Republicans and those who own or drive diesel vehicles are more impressed than non-diesel owners/drivers. Finally, voters residing in households with annual incomes in excess of \$75,000 are more likely to have a positive impression of biodiesel than those in lower income households.

Using a 5% Biodiesel Blend in All Iowa Diesel

Support is strong for legislation passed by the Iowa State Senate that would ensure oil or petroleum companies blend at least five percent biodiesel into diesel fuel sold in Iowa. Indeed, 66% of voters favor the legislation, 16% are opposed and the remaining 18% are uncertain about whether they support or oppose.



Not surprisingly, support for the legislation increases with the percentage of income from farming or agriculture. Additionally, support is stronger among younger voters (age 18-34) and seniors (65+) than it is among the 35-64 age group. This legislation is supported by voters of all political parties alike, with Republicans (60% support/22% oppose), Democrats

(69% support/13% oppose) and Independents (69% support/14% oppose) all widely supporting the proposal.

Among those who have owned or operated a diesel vehicle, support is also high (74% support/14% oppose).

Voters whose income is not derived from farming or agriculture but who have owned or operated a diesel vehicle are widely supportive, with 71% supporting and just 21% opposing. Among agriculture households who own or operate diesel vehicles, support is even higher (80%).

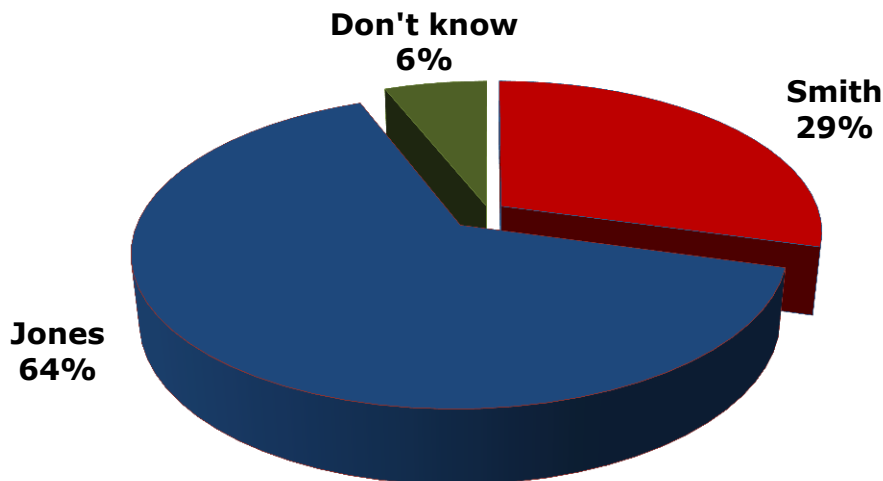
In further exploration of sentiment about the 5% proposal, survey respondents were presented with two points of view on this issue and asked which they agreed with most.

"Mrs. Smith opposes this legislation. She says the government already puts too many controls on things, and making oil companies blend regular diesel with biodiesel will just require more work and probably lead to higher diesel fuel prices.

Mrs. Jones supports this legislation. She says we need to encourage the use of renewable fuels produced in Iowa and if biodiesel can perform as well as regular diesel but is also renewable, then we should do what we can to increase its use."

We continue to find wide support, with 64% in agreement with Mrs. Jones/support the legislation and only 29% siding with Mrs. Smith/opposes legislation. The other 5% don't know.

Smith (oppose) vs. Jones (support)



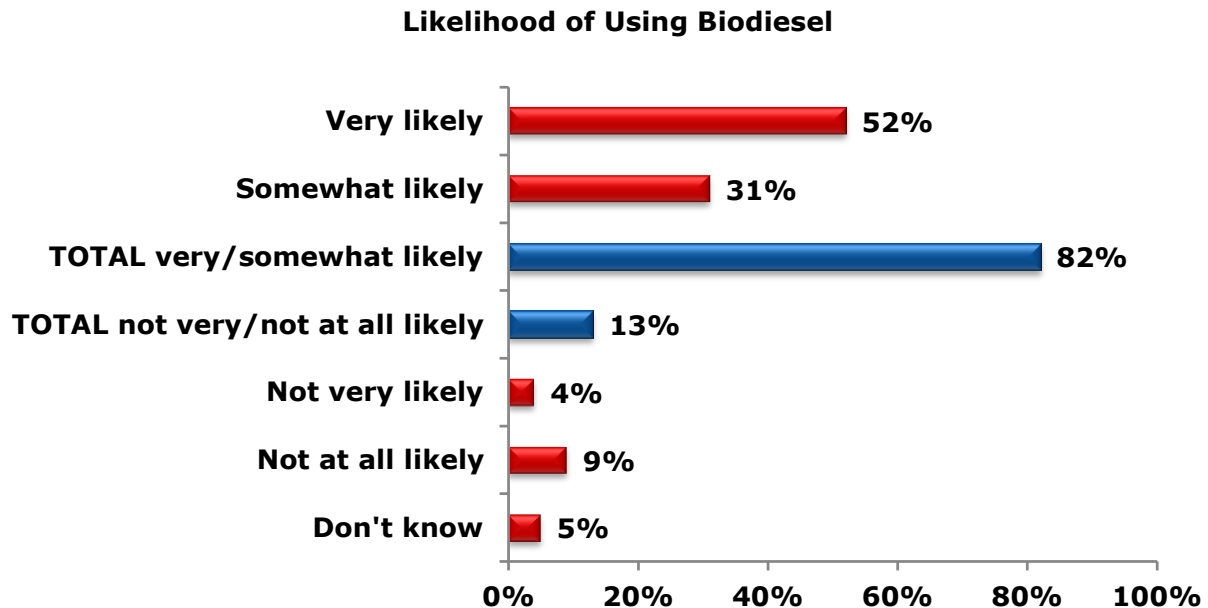
Regionally, majorities in all five Congressional Districts align themselves with Jones' supporting view. Democrats and Independents are more likely than Republicans to show support for this legislation, but nonetheless, there is still wide majority support among Republicans for Mrs. Jones' view.

Informed Views of Biodiesel

Respondents were read a brief statement about biodiesel.

"Biodiesel is a cleaner burning renewable fuel produced from soybeans grown here in Iowa. It works in any diesel engine. While reducing our reliance on foreign oil, biodiesel is powering a green economy with new jobs and more markets for Iowa soybeans. And, biodiesel fights pollution, creating cleaner air and dramatically reducing the hazardous waste produced by petroleum diesel."

After hearing this, we asked how likely respondents would be to use biodiesel in their own vehicle. **More than 4 out of 5** say they would be "very" (52%) or "somewhat" (31%) likely to use it in their own vehicle. Only 13% of respondents would not be likely to use the product and the remaining 5% are unsure.



Support After Hearing Benefits

Our survey introduced information on biodiesel's benefits and asked respondents if they would be more likely or less likely to support the legislation for a statewide blend of biodiesel in diesel fuel after hearing each.

The tested information generated wide support for the legislation. Indeed, more than two-in-three would be more likely to favor the legislation in response to all six of the messages. We also found an intensity regarding sentiment on these messages, especially those citing energy security, economic benefits and environmental benefits. Most notably, a majority of voters (55%) would be "much" more likely to support the legislation after hearing "biodiesel is a homegrown fuel produced here in Iowa and every gallon of biodiesel we use reduces our reliance on foreign oil."

Support for B5 After Hearing Benefits

	Much more likely	Total more likely	No difference	Total less likely
Biodiesel is a homegrown fuel produced here in Iowa and every gallon of biodiesel we use reduces our reliance on foreign oil	55%	83%	9%	7%
Biodiesel is produced right here in Iowa and increasing its use will help create jobs and improve the economy	48%	81%	9%	7%
Biodiesel is good for the environment, and it is renewable, clean burning and increasing its use will dramatically reduce hazardous waste produced by petroleum diesel	43%	77%	14%	7%
Studies have shown that during the past four years biodiesel demand has resulted in 2.5 billion dollars of additional net returns to soybean producers. That means a soybean farmer in Iowa with 700 acres earned an additional eight thousand dollars in 2008 due to biodiesel's impact	39%	73%	15%	10%
Currently, biodiesel is not available everywhere in Iowa and this legislation would give all diesel consumers more access to it	35%	70%	16%	12%
Diesel fuel can contain up to a five percent biodiesel blend, or B-5, as part of the diesel standard fuel. B-5 performs just like diesel and will not void engine warranties	31%	68%	17%	10%

Additional Views on Legislation

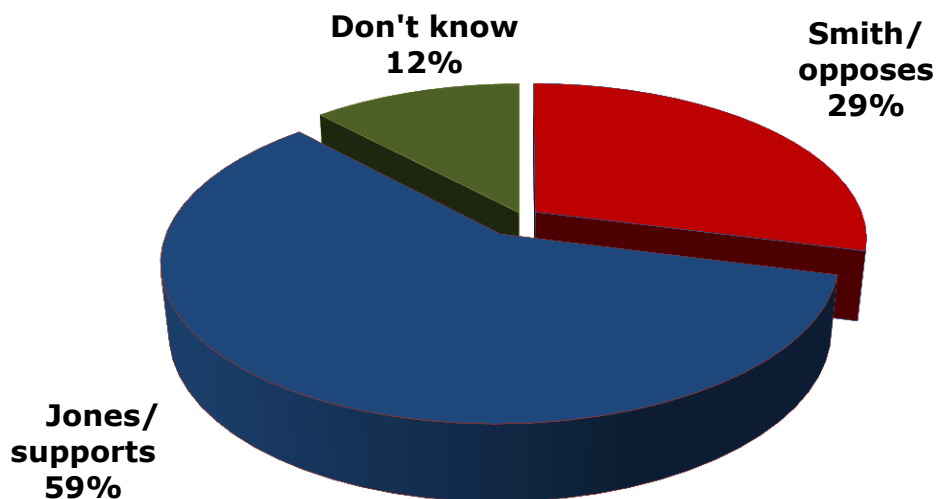
Probing deeper into the support legislation for a 5% blend of biodiesel in diesel fuel sold in Iowa, we asked voters about pricing issues and the impact those issues might have on truck traffic through the state.

"Now here is what two people, again let's call them Smith and Jones, are saying about this legislation requiring a five percent biodiesel blend in all diesel fuel sold in Iowa.

Mrs. Smith opposes this legislation because she says it will drive up the cost of diesel fuel and force truck traffic to go through other states to fill their tanks. Smith says this legislation could have a negative impact on truck stop operators who could see their business go to other states if truckers and other diesel users bypass Iowa to avoid these mandates.

Mrs. Jones supports this legislation. She says increasing the use of biodiesel here in Iowa will create jobs and increase markets for local farmers and help improve the environment and energy security. Jones points out that surrounding states like Illinois and Minnesota already have laws that increase biodiesel use and they have seen very little, if any, impact on the price of diesel or diesel consumption."

**Views on B5 Legislation
Smith (oppose) vs. Jones (support)**



Fully 59% of voters believe that increasing the use of biodiesel in Iowa will have a positive impact on jobs and farming and that requiring a B5 blend, based on neighboring states, will not adversely affect the price or consumption of diesel. Only 29% of voters tested believe a B5 blend will drive up the cost of diesel and result in truckers avoiding Iowa. The remaining 12% have not formed an opinion.

ABOUT MOORE INFORMATION:

Moore Information is a leading national opinion research and strategic analysis firm, serving a wide spectrum of clients in politics, government, and corporate and public affairs. With offices in Portland, Oregon and the Washington, D.C. area, Moore Information has provided accurate, thorough and timely opinion research that has earned them a reputation as one of the leading and most respected polling firms in the nation.

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