

# **World Gasification Industry: Status, Trends & Drivers**

*Gasification Workshop  
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Executive Director  
Gasification Technologies Council

## **This morning we will discuss:**

- **Gasification Industry Overview**
- **U.S. Public Policy & Gasification**
- **What Is Needed to Move Forward**

# Gasification Technologies Council

- **Created in 1995**
- **Mission: Promote greater use of gasification for production of power, fuels, chemicals and other products from fossil and biomass feedstocks**
- **<http://www.gasification.org>**

# Industry Growth

Operating Plant Statistics 2004 vs. 2007

## 2004

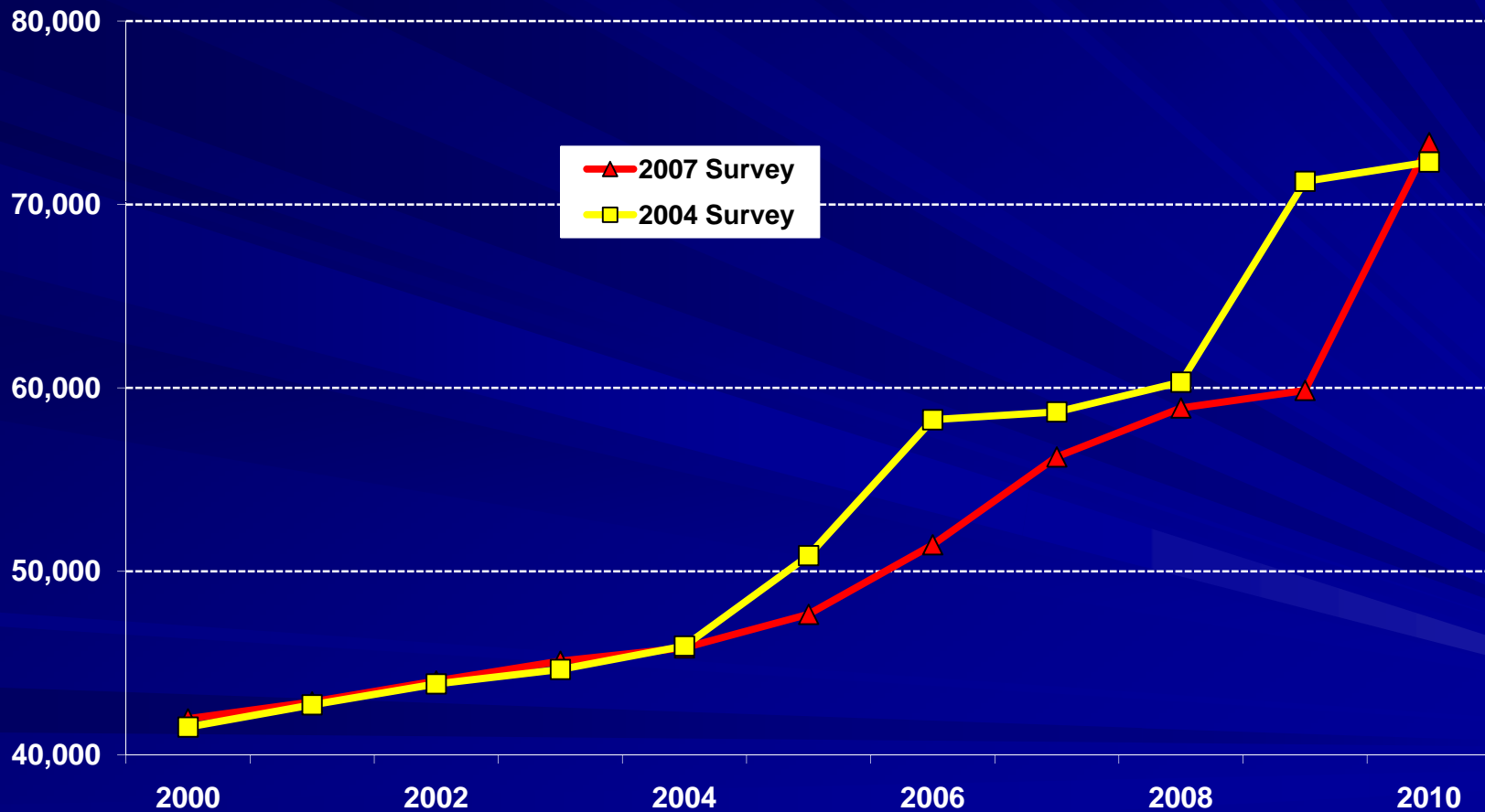
- **117** operating plants
- **385** gasifiers
- Capacity~**45,000** MWth
- Feeds
  - Coal **49%**, Pet. Resid. **36%**
- Products
  - Chemicals **37%**, F-T **36%**, Power **19%**

## 2007

- **142** Operating Plants
- **420** Gasifiers
- Capacity~**56,000** MWth
- Feeds
  - Coal **55%**, Pet. Resid. **32%**
- Products
  - Chemicals **44%**, F-T **30%**, Power **18%**

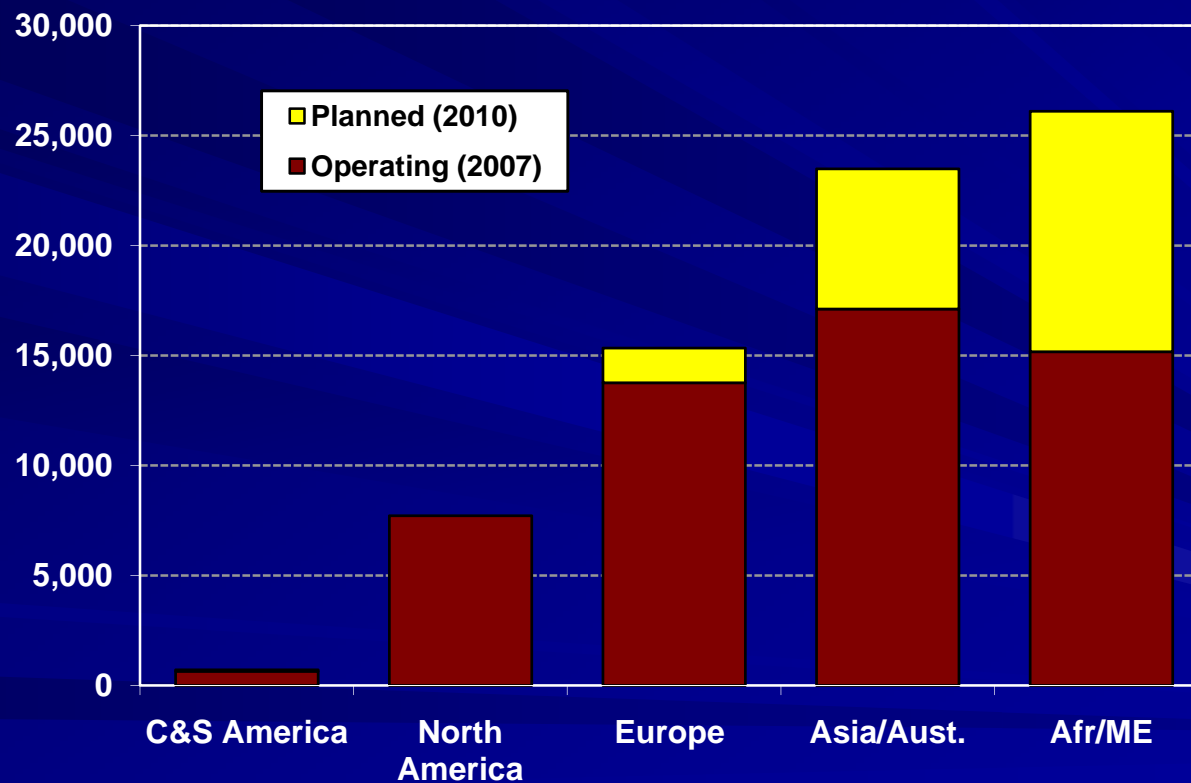
# World Gasification Capacity Growth

(MWth Equivalent)



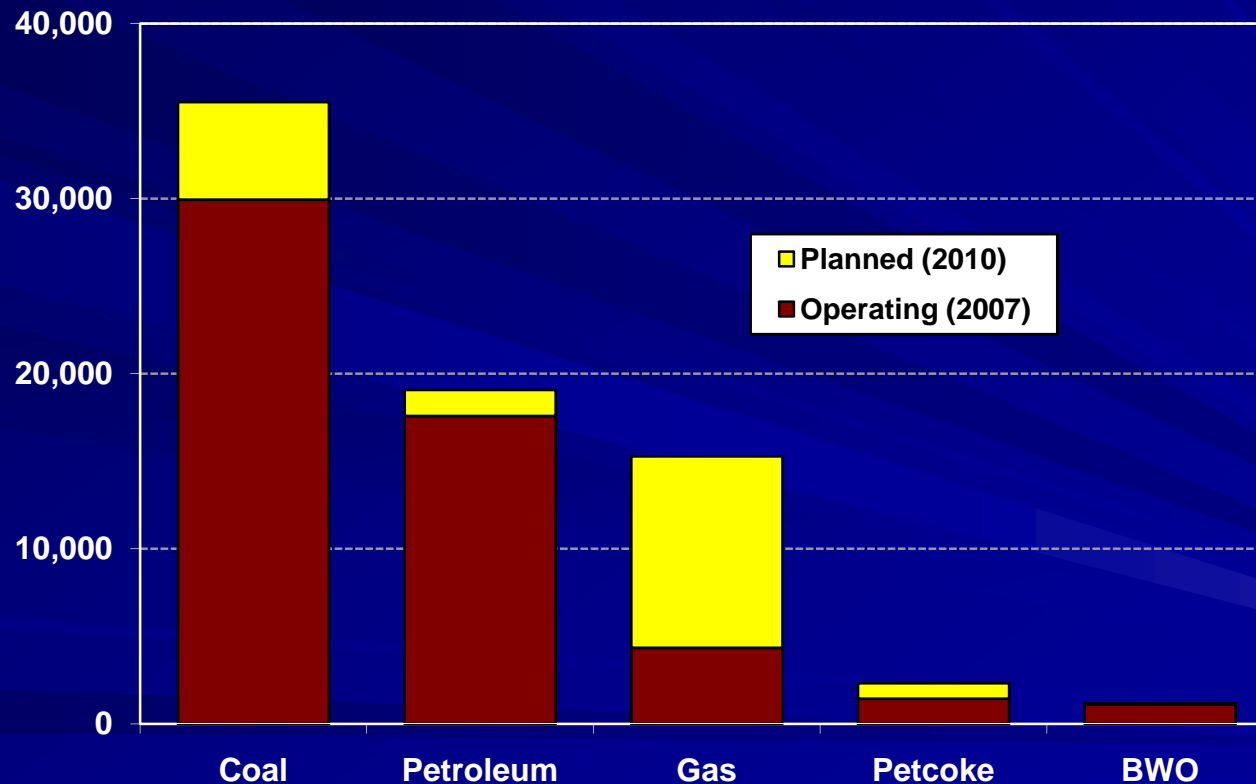
# Geographical Distribution of World Gasification Capacity

(MW<sub>th</sub> Equivalent)



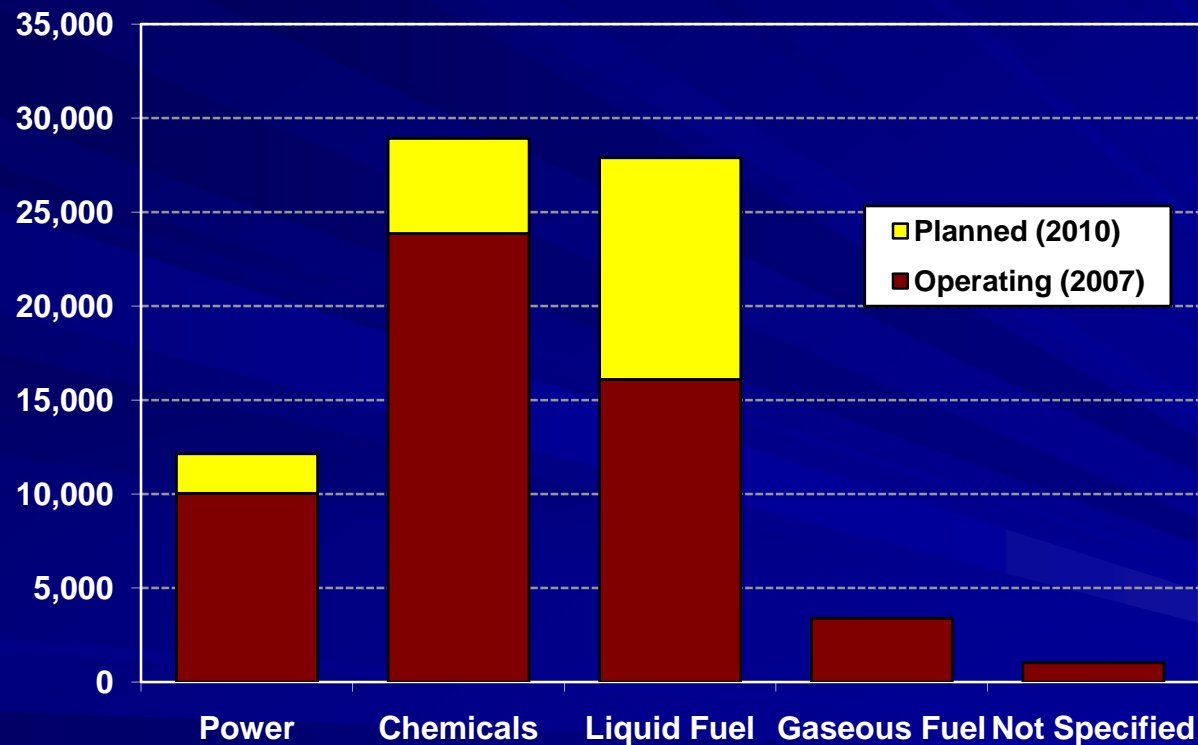
# Feedstock Distribution of World Gasification Capacity

(MW<sub>th</sub> Equivalent)



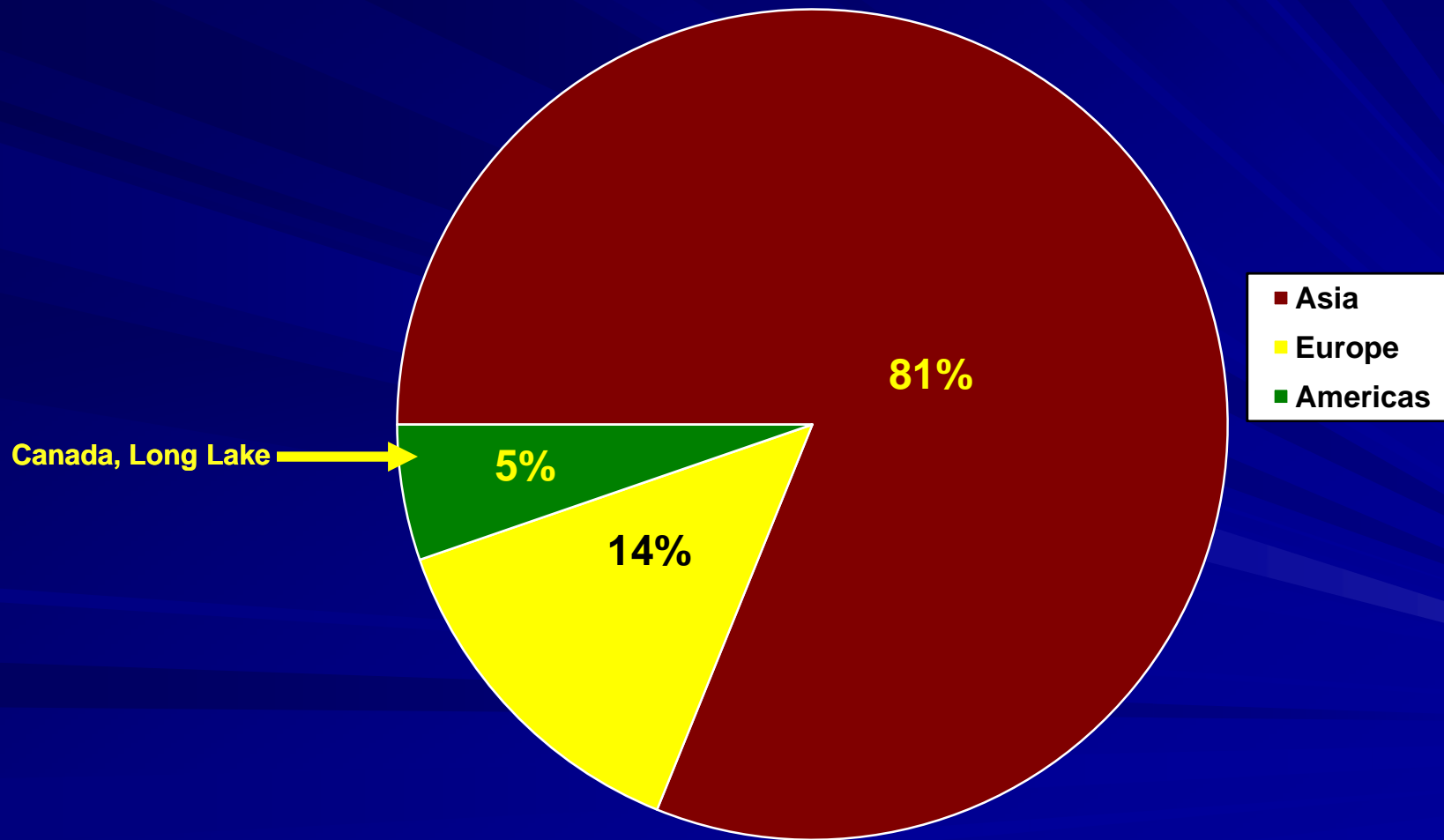
# Product Distribution of World Gasification Capacity

(MW<sub>th</sub> Equivalent)



# Shares of Growth in World Gasification Capacity 2004-2009

(without Pearl GTL)

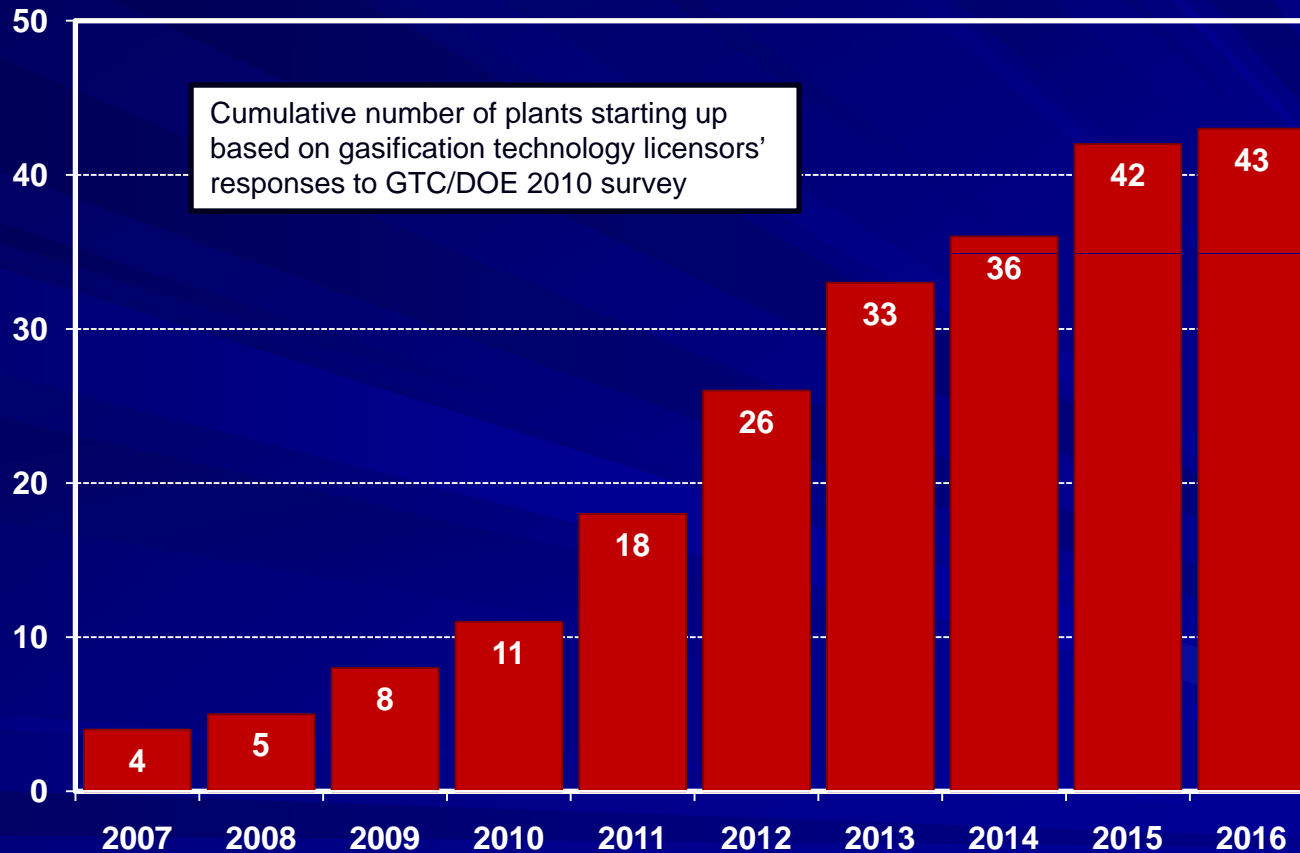


# 2004-2009 Gasification Scoreboard

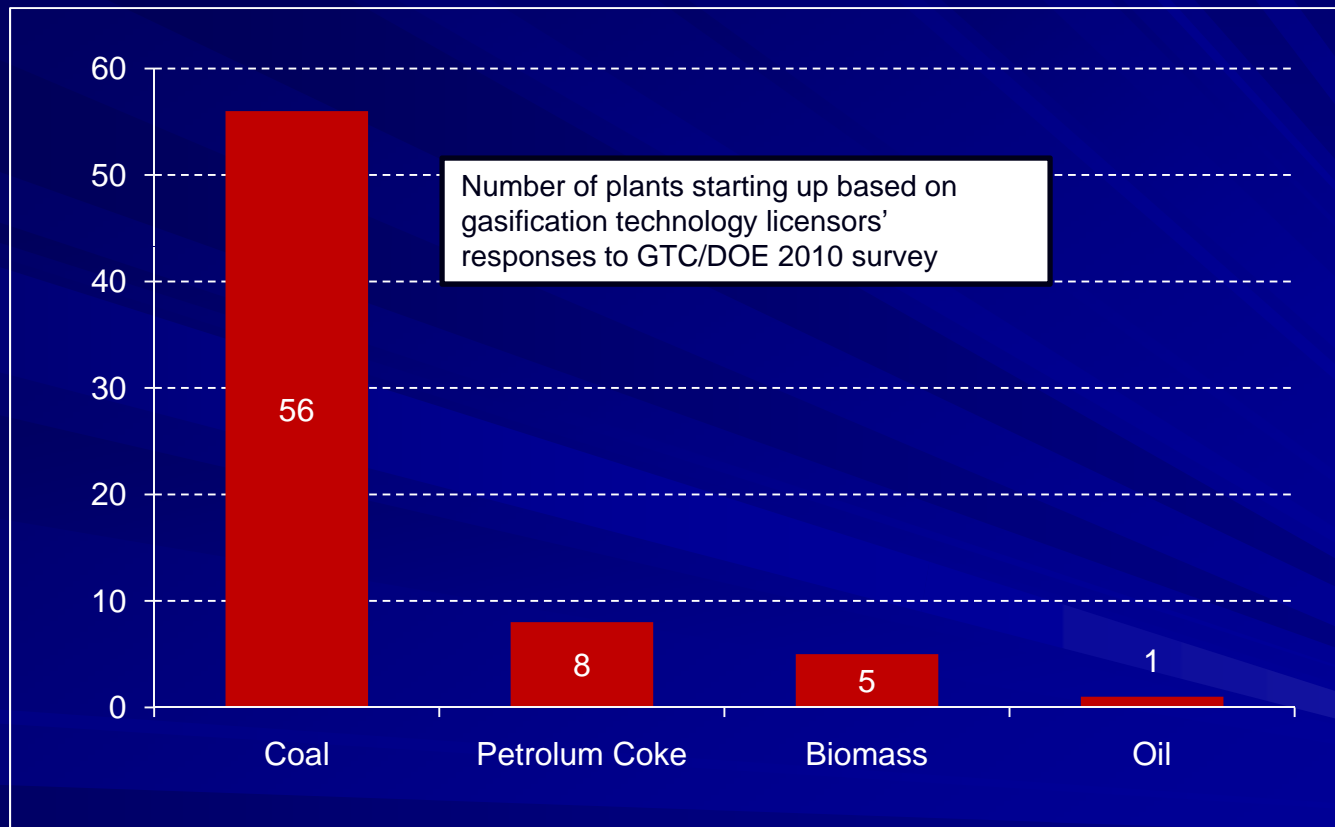
(Plant Startups)

	<b>China</b>	<b>29</b>
	<b>U.S.</b>	<b>0</b>

# Projected World Growth in Gasification Plants

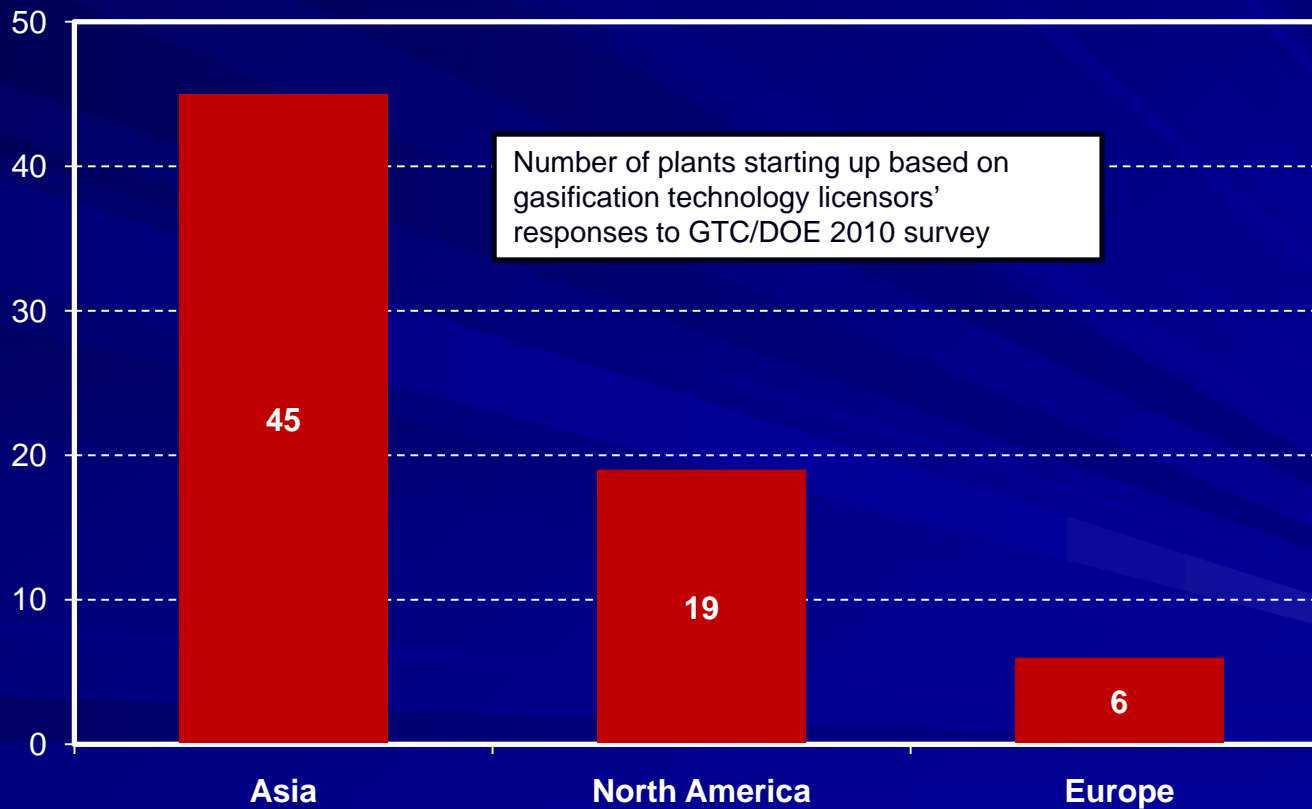


# Projected Growth in Gasification Plants by Feedstock 2007-2016



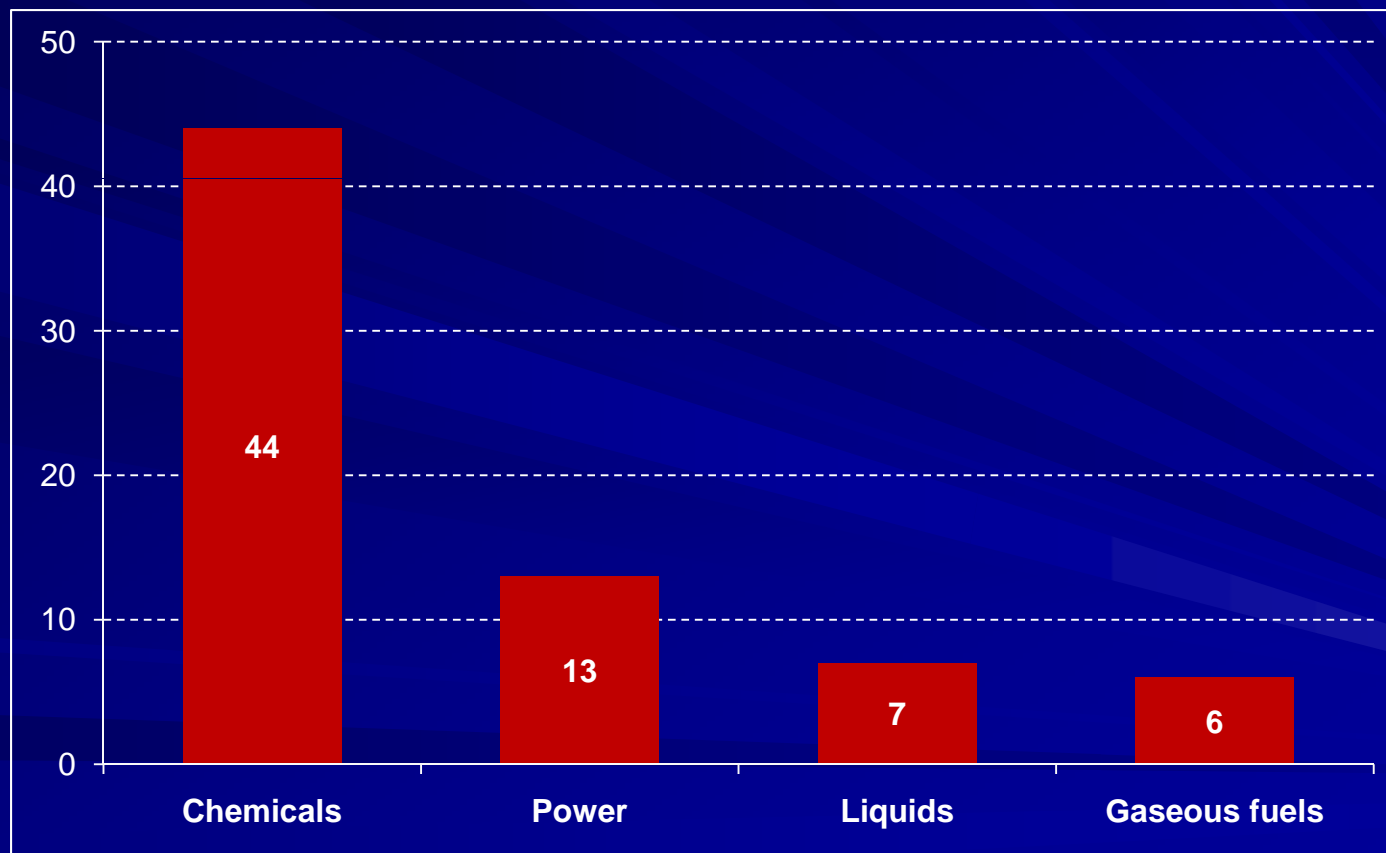
# Projected Growth in Gasification Plants by Region

2007-2016



# Projected Growth in Gasification Plants by Product

2007-2016



<http://www.gasification.org>

# **Public Policy Arena: What is Needed?**

<http://www.gasification.org>

# Existing Federal Financial Incentives

- **Clean Coal Power Initiative**
- **Loan Guarantees**
- **Investment Tax Credits (EPACT)**
- **President Obama's New Initiative**

# Necessary Additional Federal Policy Needed

- Public sector financial and policy support a necessity for gasification with CCS
- Construction & operation of commercial scale gasification manufacturing plants (IGCC, CTL/CTC, SNG) with CCS using a variety of feedstocks;
- Incentives that recognize and reward the ability of “industrial gasification” to offer large scale, near term opportunities for CCS at lower costs;
- A uniform national policy framework addressing regulation of CO<sub>2</sub> emissions and CCS, incentives, liability limitations and insurance for early adopters.

*Save the Date*

# Gasification TECHNOLOGIES 2010 CONFERENCE



OCTOBER 31 – NOVEMBER 3, 2010  
MARRIOTT WARDMAN PARK HOTEL • WASHINGTON, DC

<http://www.gasification.org>

# Questions? Comments?

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<http://www.gasification.org>