

| | |
|--|--------|
| CHAPTER ONE: INTRODUCTION | 1 |
| STUDY GOALS AND OBJECTIVES..... | 1 |
| REASONS FOR DOING THE STUDY | 1 |
| INTENDED AUDIENCE..... | 1 |
| SCOPE OF THE REPORT | 2 |
| METHODOLOGY | 2 |
| INFORMATION SOURCES..... | 3 |
| ANALYST CREDENTIALS..... | 4 |
| RICHARD HILTON, ANALYST..... | 4 |
| ANNA CRULL, CONSULTANT..... | 4 |
| RELATED BCC REPORTS | 5 |
| BCC ONLINE SERVICES..... | 5 |
| DISCLAIMER | 6 |
| CHAPTER TWO: SUMMARY..... | 7 |
| SUMMARY..... | 7 |
| SUMMARY TABLE VALUE CUMULATIVE CAPITAL BASE OF CCS TECHNOLOGIES, THROUGH 2014 (\$ BILLIONS) | 8 |
| SUMMARY FIGURE VALUE CUMULATIVE CAPITAL BASE OF CCS TECHNOLOGIES, 2005-2014 (\$ BILLIONS)..... | 9 |
| SUMMARY (CONTINUED) | 10 |
| CHAPTER THREE: OVERVIEW | 11 |
| OVERVIEW..... | 11 |
| OVERVIEW (CONTINUED) | 12 |
| GLOBAL EFFORTS TO MITIGATE CLIMATE CHANGE..... | 13 |
| KYOTO AGREEMENT | 13 |
| Clean Development Mechanism | 14 |
| Clean Development ... (Continued)..... | 15 |
| LONDON PROTOCOL: SUBSEA CO ₂ REGULATIONS | 16 |
| EUROPEAN CLIMATE EXCHANGE..... | 16 |
| STOCKHOLM CLIMATE CHANGE CONFERENCE | 17 |
| TECHNOLOGIES EXAMINED | 18 |
| PRE-COMBUSTION TECHNOLOGIES..... | 18 |
| OXY-FUEL COMBUSTION | 18 |
| POST-COMBUSTION TECHNOLOGY | 19 |
| Post-Combustion Technology (Continued) | 20 |
| ANOTHER VIEW | 21 |
| ELECTRICITY COSTS..... | 21 |
| TABLE 1 REPRESENTATIVE U.S. RESIDENTIAL COST OF A KWH OF ELECTRICITY BY STATE, MAY 2010 (¢/KWH) | 21 |
| TABLE 1 (CONTINUED)..... | 22 |
| AIR QUALITY CONTROLS FOR PULVERIZED COAL..... | 23 |
| COAL CONSUMPTION AND POWER PLANTS..... | 24 |
| USERS OF CARBON CAPTURE TECHNOLOGIES | 24 |

| | |
|--|----|
| USERS OF CARBON CAPTURE ... (CONTINUED)..... | 25 |
| ALTERNATIVES | 26 |
| OTHER ASPECTS | 27 |
| OTHER ASPECTS (CONTINUED)..... | 28 |
| CHAPTER FOUR: CARBON DIOXIDE SEQUESTRATION AND R&D | 29 |
| CARBON DIOXIDE SEQUESTRATION RULES AND PROPOSALS | 29 |
| CARBON DIOXIDE SEQUESTRATION ... (CONTINUED) | 30 |
| SEQUESTRATION OPTIONS | 31 |
| CARBON SEQUESTRATION | 32 |
| LARGE-SCALE REGIONAL CARBON SEQUESTRATION | |
| RESEARCH PROJECTS | 32 |
| TABLE 2 VALUE U.S. CO ₂ GEOLOGIC STORAGE PROJECTS (\$ | |
| MILLIONS)..... | 33 |
| TABLE 2 (CONTINUED) | 34 |
| Plains CO ₂ Reduction Partnership | 34 |
| Plains CO ₂ Reduction ... (Continued) | 35 |
| Southeast Regional Carbon Sequestration Partnership..... | 36 |
| Southeast Regional Carbon ... (Continued)..... | 37 |
| West Coast Regional Carbon Sequestration Partnership..... | 38 |
| Midwest Geological Sequestration Consortium | 38 |
| Big Sky Regional Carbon Sequestration Partnership..... | 39 |
| Midwest Regional Carbon Sequestration Partnership | 39 |
| OTHER SIGNIFICANT SEQUESTRATION PROGRAMS..... | 40 |
| Carbon Sequestration Leadership Forum | 40 |
| Carbon Sequestration ... (Continued)..... | 41 |
| R&D PROGRAMS | 42 |
| Integrated Gasification Combined Cycle (IGCC) | 42 |
| Advanced Research Projects Agency-Energy | 43 |
| Basic Energy Sciences | 43 |
| Biomass and Biorefinery System | 44 |
| Clean Coal Power Initiative | 44 |
| Clean Coal Power Initiative (Continued)..... | 45 |
| Climate Change Research | 46 |
| Genomic Science Program..... | 46 |
| NETL or National Energy Technology Laboratory | 47 |
| Strategic Center for Coal..... | 48 |
| GLOBAL R&D BY REGION..... | 48 |
| TABLE 3 WORLDWIDE CCS RESEARCH SPENDING FORECAST BY | |
| REGION, 2014 (\$ MILLIONS) | 48 |
| United States | 49 |
| FutureGen and Advanced Turbines | 49 |
| FutureGen and ... (Continued)..... | 50 |
| FIGURE 1 SCHEMATIC FUTUREGEN INTEGRATED TECHNOLOGIES | 51 |
| Canada | 51 |

| | |
|--|----|
| European Union..... | 52 |
| European Union (Continued) | 53 |
| Germany..... | 54 |
| <i>Germany (Continued)</i> | 55 |
| Norway | 56 |
| U.S.-U.K. Collaboration..... | 57 |
| U.S.-U.K. Collaboration (Continued) | 58 |
| China-EU/COACH..... | 59 |
| China | 59 |
| Japan..... | 60 |
| Australia | 61 |
| Rest of World (ROW) | 61 |
| India | 61 |
| R&D TECHNOLOGY TYPE..... | 62 |
| TABLE 4 CCS MATERIALS RESEARCH MARKET BY TECHNOLOGY (\$ MILLIONS)..... | 63 |
| Membranes | 63 |
| TABLE 5 VALUE OF CARBON DIOXIDE CAPTURE MEMBRANE RESEARCH (\$ MILLIONS)..... | 63 |
| TABLE 5 (CONTINUED) | 64 |
| TABLE 5 (CONTINUED) | 65 |
| Combustors/Turbines | 65 |
| TABLE 6 PROJECTED VALUE OF COMBUSTOR/TURBINE RESEARCH PROJECTS, 2007 (\$ MILLIONS)..... | 66 |
| Zeolites | 67 |
| TABLE 7 VALUE OF ZEOLITE RESEARCH FOR CO ₂ CAPTURE (\$ MILLIONS)..... | 68 |
| FIGURE 2 SCHEMATIC FOR METAL MONOLITHIC AMINE GRAFTED ZEOLITES FOR CO ₂ CAPTURE..... | 69 |
| Silicates..... | 70 |
| Ionic Liquids | 71 |
| TABLE 8 VALUE IONIC LIQUIDS RESEARCH FOR CO ₂ CAPTURE, 2006 (\$ MILLIONS) | 72 |
| Other CO ₂ Absorbent Materials..... | 73 |
| TABLE 9 APPROXIMATE VALUE OF ADDITIONAL CO ₂ ABSORBENT MATERIALS RESEARCH (\$ MILLIONS)..... | 74 |
| TABLE 9 (CONTINUED) | 75 |
| INFORMATION SOURCES..... | 76 |
| CHAPTER FIVE: PRE-COMBUSTION AND OXY-FUEL COMBUSTION TECHNOLOGY | 77 |
| INTEGRATED GASIFICATION COMBINED CYCLE | 77 |
| TABLE 10 GLOBAL IGCC PLANT GROWTH PROJECTIONS: SYNGAS PRODUCTION VS. ELECTRICITY PRODUCTION, THROUGH 2014 (MWT* VS. MWE**) | 77 |

| | |
|---|----|
| TABLE 11 WORLDWIDE IGCC PLANT GROWTH PROJECTIONS: CUMULATIVE VALUE OF SYNGAS AND ELECTRIC PLANTS, THROUGH 2014 (\$ BILLIONS)..... | 78 |
| IGCC ELECTRIC POWER PLANTS | 79 |
| TABLE 12 GLOBAL CARBON CAPTURE CAPITAL BASE PROJECTIONS, THROUGH 2014 (\$ BILLIONS)..... | 80 |
| TABLE 13 PROJECTED U.S. AND ROW IGCC MW BASE FOR POWER, THROUGH 2014..... | 81 |
| IGCC TECHNOLOGY..... | 81 |
| TABLE 14 COAL PLANT EFFICIENCY BY COAL TYPE (%)..... | 82 |
| Technology Distribution | 82 |
| TABLE 15 PROJECTED U.S. AND ROW IGCC MW BASE FOR POWER, THROUGH 2014 (MW/NO. OF PROJECTS) | 83 |
| TABLE 16 PLANNED MEGAWATTS OF IGCC POWER PLANTS WORLDWIDE 2014 (MW/%) | 84 |
| MAJOR COMPONENTS OF AN IGCC | 85 |
| TABLE 17 MAJOR IGCC COMPONENTS: COST AND PLANT FUNCTION (%). 85 | |
| Combined Cycle Power Block..... | 85 |
| Gasifier..... | 86 |
| Coal Handling Equipment | 86 |
| Moving-Bed Reactors..... | 86 |
| Fluidized-Bed Reactors..... | 87 |
| Circulating Fluidized Bed Combustion..... | 87 |
| Entrained-Flow Reactors..... | 87 |
| Syngas Cleanup | 88 |
| Other Components and Control Systems | 89 |
| FIGURE 3 SCHEMATIC IGCC PROCESS..... | 90 |
| METHODS OF MANUFACTURE..... | 90 |
| Process Economics | 91 |
| TABLE 18 POWER PLANT CAPITAL COSTS WITHOUT AND WITH CCS (\$/MILLION MW) | 91 |
| Process Economics (Continued)..... | 92 |
| Process Comparison..... | 93 |
| TABLE 19 ENVIRONMENTAL ADVANTAGES OF IGCC VS. THE BEST PULVERIZED COAL PLANTS..... | 93 |
| TABLE 20 COMPARISON OF IGCC, SUBCRITICAL PULVERIZED COAL, SUPERCRITICAL PULVERIZED COAL CO ₂ EMISSIONS (LB/MWH)..... | 94 |
| TABLE 21 COMPARISON OF GE, CONOCOPHILLIPS, AND SHELL TECHNOLOGIES COSTS AND EFFICIENCY | 94 |
| PRODUCT DEVELOPMENT..... | 95 |
| ENVIRONMENTAL ADVANTAGES..... | 95 |
| Environmental Advantages (Continued) | 96 |
| TABLE 22 IGCC VS. PULVERIZED COAL WITH ADVANCED POLLUTION CONTROLS ENVIRONMENTAL COMPARISON..... | 97 |

| | |
|--|-----|
| INDUSTRY STRUCTURE AND COMPETITIVE ANALYSIS | 97 |
| TABLE 23 WORLDWIDE PROJECTED MARKET SHARES OF IGCC FOR ELECTRICITY, 2007–2012 (NUMBER OF PROJECTS/%) | 98 |
| TABLE 24 PROJECTED IGCC CO ₂ POTENTIAL FOR EMISSION CREDITS VS. PULVERIZED COAL AND SUPERCRITICAL PULVERIZED POWER PLANTS, THROUGH 2012 | 98 |
| Industry Drivers | 99 |
| TABLE 25 IGCC INDUSTRY DRIVERS VS. INHIBITORS | 99 |
| Strategies | 100 |
| Shifts | 100 |
| IMPORTANCE OF PATENTS | 100 |
| Patents by Application | 101 |
| TABLE 26 U.S. CO ₂ CAPTURE PATENTS BY APPLICATION TYPE, 2005– 2009 (%) | 101 |
| Patent Technology by Region | 101 |
| TABLE 27 CARBON DIOXIDE-RELATED PATENTS BY GLOBAL REGION, 2005–2009 (%) | 102 |
| IMPORTANCE OF RESEARCH | 102 |
| Importance of Research (Continued)..... | 103 |
| TABLE 28 WORLDWIDE IGCC PLANT GROWTH PROJECTIONS: SYNGAS PRODUCTION VS. ELECTRICITY PRODUCTION, THROUGH 2014 (MWTH* VS. MWE**). | 104 |
| OTHER ASPECTS | 105 |
| THE COAL UTILIZATION SCIENCE PROGRAM | 105 |
| The Coal Utilization ... (Continued) | 106 |
| TABLE 29 WORLDWIDE OXYGEN APPLICATION MARKETS, 2009 (\$ BILLIONS) | 107 |
| TABLE 30 GLOBAL OXYGEN MARKET PROJECTIONS, THROUGH 2014 (\$ BILLIONS/BCF/MMTS) | 107 |
| TECHNOLOGY MARKET FOR OXY-FUEL COMBUSTION OR CARBON CAPTURE | 108 |
| TABLE 31 PROJECTED WORLDWIDE UTILITY MARKET FOR COMBUSTION TECHNOLOGY PRODUCTS, THROUGH 2014 (\$ BILLIONS) | 108 |
| OXY-COMBUSTION TECHNOLOGY | 109 |
| MAJOR OXY-FUEL POWER GENERATION COMPONENTS | 109 |
| TABLE 32 MAJOR OXY-COMBUSTION COMPONENT COSTS, 2009 (%) | 110 |
| Boiler-Turbine Generator | 110 |
| Air Separation Unit | 111 |
| Carbon Dioxide Cooler/Condenser/Compressor | 112 |
| Air Pollution Controls | 112 |
| PROCESS ECONOMICS | 113 |
| FIGURE 4 SCHEMATIC OXY-FUEL SYSTEM | 113 |

| | |
|--|------------|
| TABLE 33 COST OF STATE-OF-THE ART 740 MW PULVERIZED COAL OXY-COMBUSTION PLANT WITH CO ₂ CAPTURE COMPARED WITH A PULVERIZED COAL AIR-FIRED COAL PLANT WITHOUT CO ₂ CAPTURE, 2009..... | 114 |
| TABLE 34 SUPERCRITICAL OXY-FUEL COSTS COMPARED WITH ULTRA-SUPERCRITICAL OXY-FUEL COSTS, WITH AND WITHOUT CAPTURE, 2009..... | 115 |
| TABLE 35 OXY-FUEL COMPONENT COST OF ENERGY, 2009 (C/KWH/%)... PROCESS COMPARISON..... | 116 116 |
| TABLE 36 ULTRA-SUPERCRITICAL OXY-FUEL PERFORMANCE COMPARED WITH SUPERCRITICAL OXY-FUEL PERFORMANCE, WITH AND WITHOUT CAPTURE, 2009..... | 117 |
| TABLE 37 AUXILIARY POWER LOSS FOR OXY-FUEL POWER PLANT..... | 117 |
| PRODUCT DEVELOPMENT..... | 118 |
| ENVIRONMENTAL ADVANTAGES..... | 118 |
| INDUSTRY STRUCTURE AND COMPETITIVE ANALYSIS: COMBUSTION..... | 118 118 |
| Industry Market Shares..... | 119 |
| TABLE 38 COMPANY MARKET SHARES OF OXY-FUEL FOR UTILITY APPLICATIONS, 2009 (\$ MILLIONS/%)..... | 120 |
| Industry Drivers..... | 120 |
| Industry Drivers (Continued) | |
| TABLE 39 OXY-FUEL INDUSTRY DRIVERS VS. INHIBITORS..... | 122 |
| Strategies..... | 122 |
| Shifts..... | 122 |
| Industry Impacts..... | 123 |
| Regulatory Environment..... | 124 |
| Importance of Research and Patents..... | 124 |
| Importance of Research ... (Continued)..... | 125 |
| Importance of Research ... (Continued)..... | 126 |
| CHAPTER SIX: POST-COMBUSTION CCS..... | 127 |
| TECHNOLOGY MARKET FOR POST-COMBUSTION CCS..... | 127 |
| TABLE 40 PROJECTED WORLDWIDE VALUE OF POST-COMBUSTION STORAGE PROJECTS AND ONGOING EOR, THROUGH 2014 (\$ BILLIONS)..... | 127 |
| POST-COMBUSTION RECOVERY APPLICATION MARKET..... | 128 |
| TABLE 41 PROJECTED WORLDWIDE VALUE OF CO ₂ CAPTURE PROJECTS, CO ₂ CAPTURE, AND VALUE OF CO ₂ , THROUGH 2014..... | 129 |
| FIGURE 5 PROJECTED WORLDWIDE MARKET SHARE OF CCS TECHNOLOGIES BY COUNTRY AND MTS OF CO ₂ CAPTURED, 2014 (%)..... | 129 |
| TECHNOLOGY: CHEMICAL STRIPPING..... | 130 |
| TECHNOLOGY: CHEMICAL STRIPPING (CONTINUED)..... | 131 |

| | |
|---|-----|
| FIGURE 6 SCHEMATIC OF POWER GENERATION AND CO ₂ SEQUESTRATION | 132 |
| MAJOR POST-COMBUSTION CCS CHEMICAL STRIPPING COMPONENTS | 132 |
| Flue Gas Supply/SO ₂ Polishing..... | 133 |
| Carbon Dioxide Absorption | 133 |
| Circulating Water System..... | 134 |
| Water Wash Section | 134 |
| Rich/Lean Amine Heat Exchange System..... | 135 |
| Solvent Stripper..... | 135 |
| Solvent Stripper Reclaimer | 136 |
| Steam Condensate | 136 |
| Corrosion Inhibitor System | 136 |
| Gas Compression and Drying System | 136 |
| FIGURE 7 SCHEMATIC OF AN AMINE TREATMENT SYSTEM | 137 |
| PROCESS ECONOMICS..... | 137 |
| TABLE 42 AMINE SCRUBBING COSTS COMPARED WITH SUPERCRITICAL AND ULTRA-SUPERCRITICAL, WITH AND WITHOUT CAPTURE | 138 |
| TABLE 42 (CONTINUED)..... | 139 |
| TABLE 43 AMINE CCS COMPONENT COST OF ELECTRICITY PER KWH AND PERCENTAGE OF COST OF ELECTRICITY PER KWH..... | 139 |
| TABLE 44 CAPITAL COSTS FOR A 720 MW COAL POWER PLANT, 6,000 MTS OF CO ₂ A DAY CCS RETROFIT, 2009..... | 140 |
| PROCESS COMPARISONS | 140 |
| TABLE 45 SUPERCRITICAL AMINE PERFORMANCE COMPARED WITH ULTRA-SUPERCRITICAL AMINE PERFORMANCE, WITH AND WITHOUT CAPTURE | 141 |
| AMMONIA CCS TECHNOLOGY | 141 |
| PROCESS ECONOMICS..... | 142 |
| TABLE 46 COST COMPARISON OF ANHYDROUS AMMONIA AND MEA FOR PULVERIZED COAL AND ULTRA-SUPERCRITICAL PLANTS | 142 |
| TABLE 46 (CONTINUED)..... | 143 |
| PROCESS COMPARISON..... | 144 |
| TABLE 47 COMPARISON OF MEA VS. ANHYDROUS AMMONIA PERFORMANCE IN A PULVERIZED COAL PLANT VS. AN ULTRA-SUPERCRITICAL PLANT | 145 |
| TABLE 48 VALUE-ADDED PRODUCTS FROM AMMONIA POLLUTION CONTROLS FOR NO _x , SO _x , AND GD (OPERATING AT 80% OF CAPACITY) | 146 |
| TABLE 49 MEA VS. AMMONIA BTU REQUIREMENTS | 146 |
| PRODUCT DEVELOPMENT | 147 |
| INDUSTRY DRIVERS | 147 |
| TABLE 50 INDUSTRY DRIVERS VS. INHIBITORS | 147 |

| | |
|--|-----|
| TABLE 50 (CONTINUED) | 148 |
| Shifts | 148 |
| Strategies | 148 |
| PATENT FACTORS | 148 |
| IMPORTANCE OF RESEARCH FOR POST-COMBUSTION | 148 |
| CHEMICALS FOR POST-COMBUSTION CARBON CAPTURING | |
| PROCESS | 149 |
| SORBENTS | 149 |
| INDUSTRY STRUCTURE AND COMPETITIVE ANALYSIS: | |
| POST-COMBUSTION | 150 |
| TABLE 51 WORLDWIDE NUMBER OF CHEMICAL-BASED CARBON | |
| CAPTURE PLANT INSTALLATIONS BY COMPANY (NUMBER/%) | 151 |
| TABLE 52 VALUE SOLVENTS FOR CCS, 2009 (\$ BILLIONS) | 152 |
| Trends in Ethanolamine Demand | 152 |
| TABLE 53 PROJECTED WORLDWIDE PRODUCTION OF | |
| ETHANOLAMINE, THROUGH 2014 (MMTS AND \$ BILLIONS) | 153 |
| TABLE 54 WORLDWIDE ETHANOLAMINE PRODUCTION | |
| BY REGION, 2009 (%) | 154 |
| FIGURE 8 GLOBAL ETHANOLAMINE MARKET SHARES BY COMPANY, | |
| 2009 (%) | 155 |
| TABLE 55 WORLDWIDE ETHANOLAMINE CAPACITY ESTIMATED BY | |
| COMPANY, 2009 (\$ MILLIONS) | 156 |
| Ethanolamine Production | 156 |
| CHEMICAL SOLVENT/ORGANICS: AMINE BASED | 157 |
| Monoethanolamine | 158 |
| Monoethanolamine (Continued) | 159 |
| Amine Guard | 160 |
| Amino-Di-Ethylene-Glycol (ADEG) | 160 |
| Activated Methyldiethanolamine (aDMEA) | 161 |
| Amisol Mix | 161 |
| Diisopropylamine | 161 |
| Diethanolamine/SNPA-DEA | 162 |
| Econamine FG Process | 162 |
| Econamine FG Process (Continued) | 163 |
| Estasolván Process | 164 |
| Flexsorb Technology | 164 |
| Fluor Solvent | 165 |
| Glymine | 165 |
| Applications | 166 |
| KS-1, KS-2, and KS-3 | 166 |
| MDEA and Hybrid Solvents | 166 |
| Omnisulf | 167 |
| Sterically Hindered Amines | 168 |
| PHYSICAL SOLVENTS | 168 |

| | |
|-----------------------------------|-----|
| Alkazid | 168 |
| Morphysorb | 169 |
| Optisol | 170 |
| Potassium Carbonate/Benfield..... | 170 |
| PuraTreat R and F..... | 171 |
| Purisol | 172 |
| Rectisol | 172 |
| Rectisol (Continued)..... | 173 |
| Selefining | 174 |
| Selexol | 174 |
| Sepasolv MPE | 175 |
| Sulfinol | 175 |
| Ucarsol | 176 |

CHAPTER SEVEN: MAJOR MARKETS FOR CARBON CAPTURE

| | |
|---|-----|
| STORAGE (CCS) AND TECHNOLOGIES | 177 |
| ELECTRIC POWER: ELECTRICITY PRODUCTION | 177 |
| TABLE 56 INTERNATIONAL ENERGY ANNUAL USE, 2004–2008 (BILLION KWHS)..... | 178 |
| TABLE 56 (CONTINUED)..... | 179 |
| TABLE 56 (CONTINUED)..... | 180 |
| TABLE 56 (CONTINUED)..... | 181 |
| TABLE 56 (CONTINUED)..... | 182 |
| TABLE 56 (CONTINUED)..... | 183 |
| TABLE 57 WORLDWIDE APPLICATIONS OF CARBON CAPTURE SYSTEMS TECHNOLOGIES AND ELECTRIC GROWTH PROJECTIONS, THROUGH 2014..... | 184 |
| TABLE 58 PROJECTED WORLDWIDE POWER CAPACITY WITH OR WITHOUT CARBON CAPTURE SYSTEMS BY TYPE PROJECTED TO 2014 (MW MILLIONS)..... | 185 |
| TABLE 59 PROJECTED MW INCREASE IN CARBON CAPTURE SYSTEMS AND TECHNOLOGIES WORLDWIDE, THROUGH 2014 (MW IN MILLIONS) | 186 |
| TABLE 60 CUMULATIVE WORLDWIDE UTILITY MARKET VALUE FOR CARBON CAPTURE TECHNOLOGY BY TYPE, THROUGH 2014 (\$ BILLIONS) | 187 |
| FIGURE 9 WORLD ELECTRIC POWER MARKET SHARES BY REGION, 2009 (%) | 188 |
| MARKET TRENDS..... | 188 |
| Market Trends (Continued) | 189 |
| TABLE 61 WORLDWIDE POTENTIAL VALUES OF CCS TECHNOLOGIES FOR ELECTRIC POWER, 2014 (MW/\$MILLIONS)..... | 190 |
| COAL PRODUCTION..... | 191 |

| | |
|--|-----|
| TABLE 62 PROJECTED U.S. MARKET SHARES OF CCS TECHNOLOGIES FOR COAL POWER, 2014 (1,012 W)..... | 192 |
| PROCESS ECONOMICS | 192 |
| Process Economics (Continued) | 193 |
| REGULATORY ENVIRONMENT..... | 194 |
| Regulatory Environment (Continued) | 195 |
| APPLICATION MARKETS FOR CARBON DIOXIDE CAPTURE AND STORAGE | 196 |
| FIGURE 10 PROJECTED APPLICATION MARKETS FOR CCS BY INDUSTRY, 2014..... | 197 |
| FIGURE 11 COST PER MT OF CO ₂ FROM INDUSTRIAL SOURCES, 2008..... | 198 |
| NATURAL GAS PROCESSING | 199 |
| TABLE 63 PROJECTED WORLDWIDE APPLICATION MARKETS FOR POST-COMBUSTION SOLVENT SYSTEMS, THROUGH 2014 (\$ BILLIONS) | 200 |
| NATURAL GAS PROCESSING (CONTINUED)..... | 201 |
| NATURAL GAS PROCESSING (CONTINUED)..... | 202 |
| NATURAL GAS PROCESSING (CONTINUED)..... | 203 |
| NATURAL GAS PROCESSING (CONTINUED)..... | 204 |
| NATURAL GAS PROCESSING (CONTINUED)..... | 205 |
| TABLE 64 PROJECTED WORLDWIDE VALUE OF CO ₂ ANTI-CORROSION FOR PIPELINE TRANSMISSION, THROUGH 2014 | 206 |
| NATURAL GAS PROCESSING (CONTINUED)..... | 207 |
| FIGURE 12 MAJOR INDUSTRIAL SOURCES OF 1.3 BCF/D CO ₂ FOR EOR, 2009 (%)..... | 208 |
| NATURAL GAS PROCESSING (CONTINUED)..... | 209 |
| HYDROGEN..... | 210 |
| HYDROGEN (CONTINUED) | 211 |
| TABLE 65 GLOBAL HYDROGEN AND CO ₂ PRODUCTION FROM COAL AND GAS, 2009 | 212 |
| ENHANCED OIL RECOVERY | 213 |
| TABLE 66 PROJECTED WORLD OIL PRODUCTION FROM EOR AND CO ₂ USE, THROUGH 2014 | 214 |
| ENHANCED OIL RECOVERY (CONTINUED)..... | 215 |
| LOWER-48 OFFSHORE..... | 216 |
| TABLE 67 NORTH AMERICAN CO ₂ EOR BOE/D, 2009 | 216 |
| TABLE 68 U.S. RECOVERABLE BARRELS OF OIL USING CO ₂ INJECTION BY REGION, 2009 (BILLION BBLs/TCF) | 217 |
| FIGURE 13 PROJECTED U.S. REGIONAL MARKETS FOR CO ₂ FOR EOR BY RECOVERABLE BARRELS OF OIL, 2012 (%)..... | 218 |
| NATURAL CO ₂ RESERVOIRS..... | 218 |
| Natural CO ₂ Reservoirs (Continued)..... | 219 |
| TABLE 69 U.S. CO ₂ RESERVES PROVEN AND PROBABLE, 2009..... | 220 |

| | |
|---|-----|
| Bravo Dome..... | 220 |
| Doe Canyon | 220 |
| Jackson Dome | 221 |
| McElmo Dome..... | 221 |
| TRANSPORT OF CO ₂ | 221 |
| Pipelines..... | 222 |
| FIGURE 14 U.S. CO ₂ PIPELINES | 222 |
| Pipeline Legislation | 222 |
| TABLE 70 U.S. CO ₂ PIPELINE AND TRANSPORT COSTS, 2009..... | 223 |
| TABLE 71 SUMMARY OF MAJOR U.S. CO ₂ PIPELINES..... | 224 |
| TABLE 71 (CONTINUED)..... | 225 |
| Bravo Pipeline..... | 225 |
| Centerline..... | 225 |
| Canyon Reef Carriers | 226 |
| Central Basin Pipeline..... | 226 |
| Cortez Pipeline..... | 226 |
| Este Pipeline | 227 |
| Pecos Pipeline | 227 |
| Powder River Basin | 227 |
| Sheep Mountain Pipeline | 227 |
| Slaughter Pipeline | 228 |
| Val Verde..... | 228 |
| West Texas Pipeline and the Llano Lateral | 228 |
| Calgary Alberta CO ₂ Pipeline | 229 |
| TECHNOLOGY FOR CO ₂ PUMPED EOR | 229 |
| IMPORTANCE OF RESEARCH FOR EOR..... | 230 |
| CO ₂ EOR MARKET POTENTIAL | 231 |
| CRUDE OIL MARKET POTENTIAL..... | 232 |
| TABLE 72 CO ₂ DAILY DELIVERIES FOR EOR BY COMPANY, 2009 (MILLION CUBIC FEET)..... | 233 |
| FIGURE 15 CO ₂ DELIVERIES TO THE EOR MARKET BY MAJOR COMPANY, 2009 (%) | 234 |
| PRODUCT DEVELOPMENT | 234 |
| MARKET COMPETITION | 235 |
| EOR HISTORY AND PROJECTIONS | 235 |
| TABLE 73 COST PER BARREL OF OIL USING CO ₂ EOR FLOODING, 2009 (\$) | 236 |
| EOR History and Projections (Continued) | 237 |
| TABLE 74 PROJECTED NORTH AMERICAN OIL EQUIVALENTS A DAY AND CO ₂ REQUIRED PER DAY, THROUGH 2014 | 238 |
| TABLE 75 ONGOING CO ₂ FLOODING IN CRUDE OIL PRODUCTION PROJECTS, 2009 | 239 |
| TABLE 75 (CONTINUED)..... | 240 |

| | |
|--|-----|
| TABLE 76 REST OF WORLD EOR PROJECTS: OPERATING AND UNDER CONSIDERATION, 2009..... | 241 |
| TABLE 76 (CONTINUED)..... | 242 |
| CO ₂ MERCHANT MARKET | 243 |
| TABLE 77 WORLDWIDE PROJECTED CO ₂ PRODUCTION, THROUGH 2014 (MMT) | 244 |
| TABLE 78 CO ₂ STATISTICS BY MAJOR COMPANY..... | 245 |
| TABLE 79 NORTH AMERICAN CO ₂ MERCHANT SALES, 2009 | 246 |
| CO ₂ Merchant Market (Continued)..... | 247 |
| TABLE 80 PROJECTED U.S. CARBON DIOXIDE PRODUCTION FROM ETHANOL SYNTHESIS, THROUGH 2014 (MMT)..... | 248 |
| TABLE 81 PROJECTED WORLDWIDE MERCHANT CO ₂ CONSUMPTION BY REGION, THROUGH 2014 (MMT)..... | 249 |
| Ethanol and CO ₂ Coproduction | 250 |
| CO ₂ MARKETS | 251 |
| TABLE 82 PROJECTED U.S. ETHANOL PRODUCTION AND CO ₂ COPRODUCT, THROUGH 2014..... | 251 |
| Merchant CO ₂ | 252 |
| TABLE 83 APPLICATIONS FOR CARBON DIOXIDE | 252 |
| TABLE 83 (CONTINUED)..... | 253 |
| FIGURE 16 WORLDWIDE MERCHANT CO ₂ MARKET SHARES BY APPLICATION TYPE, 2009 (%) | 254 |
| Merchant CO ₂ (Continued) | 255 |
| Merchant CO ₂ (Continued) | 256 |
| TABLE 84 WORLDWIDE APPLICATION MARKETS FOR CO ₂ CLEANING BY REGION (NO./\$)..... | 257 |
| Dry Cleaning and Industrial Cleaning | 258 |
| Dry Cleaning and ... (Continued)..... | 259 |
| Electronics Industry | 260 |
| Food | 260 |
| Synthesis and Chemicals | 261 |
| Inerting | 261 |
| Other Uses | 262 |
| Pharmaceutical | 262 |
| Refrigeration | 262 |
| TABLE 85 REFRIGERATION USES OF CARBON DIOXIDE, 2009 | 263 |
| Water Treatment | 263 |
| Welding | 264 |
| CARBON CAPTURE MARKET | 264 |
| CARBON CAPTURE MARKET (CONTINUED)..... | 265 |
| CARBON CAPTURE MARKET (CONTINUED)..... | 266 |
| TABLE 86 GLOBAL APPLICATION MARKETS FOR CCS, THROUGH 2014 (\$ BILLIONS) | 267 |

| | |
|--|-----|
| TABLE 87 GLOBAL CO ₂ CONSUMPTION BY APPLICATION, THROUGH 2014 (\$ BILLIONS) | 268 |
| TABLE 88 PROJECTED WORLDWIDE CO ₂ CONSUMED BY OIL, CHEMICAL, MERCHANT, AND CARBON MARKETS, THROUGH 2014 (MMT) | 268 |
| FIGURE 17 WORLDWIDE MARKET SHARES BY MAJOR APPLICATION BY CO ₂ CONSUMED, 2009 (MMT of CO ₂) | 269 |
| TABLE 89 PROJECTED WORLDWIDE CO ₂ CONSUMED BY OIL, CHEMICAL, AND MERCHANT MARKETS, THROUGH 2014 (\$ BILLIONS) | 270 |
| APPENDIX | 271 |
| PRE-COMBUSTION COMPANY WEBSITES | 271 |
| PRE-COMBUSTION COMPANY WEBSITES (CONTINUED)..... | 272 |
| PRE-COMBUSTION COMPANY WEBSITES (CONTINUED)..... | 273 |
| PRE-COMBUSTION COMPANY WEBSITES (CONTINUED)..... | 274 |
| PRE-COMBUSTION COMPANY WEBSITES (CONTINUED)..... | 275 |
| OXY-COMBUSTION COMPANY WEBSITES..... | 276 |
| POST-COMBUSTION COMPANY WEBSITES..... | 277 |
| POST-COMBUSTION COMPANY WEBSITES (CONTINUED) | 278 |
| POST-COMBUSTION COMPANY WEBSITES (CONTINUED) | 279 |
| POST-COMBUSTION COMPANY WEBSITES (CONTINUED) | 280 |
| POST-COMBUSTION COMPANY WEBSITES (CONTINUED) | 281 |
| POST-COMBUSTION COMPANY WEBSITES (CONTINUED) | 282 |