

CCP: Looking Forward in the USA



World of Coal Ash 2015

Nashville, TN

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American Coal Ash Association

Some recent history

- Beneficial use of coal combustion products started the 21st century with strong growth
- In 2000 the US EPA made a “final” determination that CCP did not warrant management as a hazardous waste giving investors, specifiers and users regulatory certainty



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History continued

- Recycling rate in 2000 was 29.5%
- Investment flowed into the industry
- Beneficial use was supported by EPA and other federal agencies through the Coal Combustion Products Partnership (C2P2)
- Recycling started to grow rapidly



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More history

- By 2008 the recycling rate grew to 44.5% - an increase of about 50%
- November 2008 – an election
- December 2008 – Kingston spill
- January 2009 – new EPA administrator
- June 2010 – an EPA proposal
- **December 2014 - regulation**



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Recycling stalled

- While EPA has been in rulemaking the recycling rate has remained about the same
- Regulatory uncertainty curtailed investment
- The threat of hazardous waste rules created a toxic stigma



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“Coal is Dead”

- Anti-coal groups have been working to demonize coal and other fossil fuels
- Cheap natural gas prices have resulted in less coal fired generation
- Clean air rules have accelerated coal plant closures



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Coal is not Dead

- Coal-fired generation will be an important part of the energy mix for the next 25 years at a minimum
- The plants being retired needed to be retired
- Balance in energy portfolios is critical
- Technology is answering challenges



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Retiring plants

- Older units – average 54 years
- Smaller units – less than 200 MW
- Smaller capacity – less than 45%
- No SO₂ control
- Cannot justify adding SO₂ control



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Challenges and Opportunities

- CCP is safe
- Markets need to be assured of CCP availability
- Coal plants will continue to operate
- Regulatory certainty is established making investment viable once again

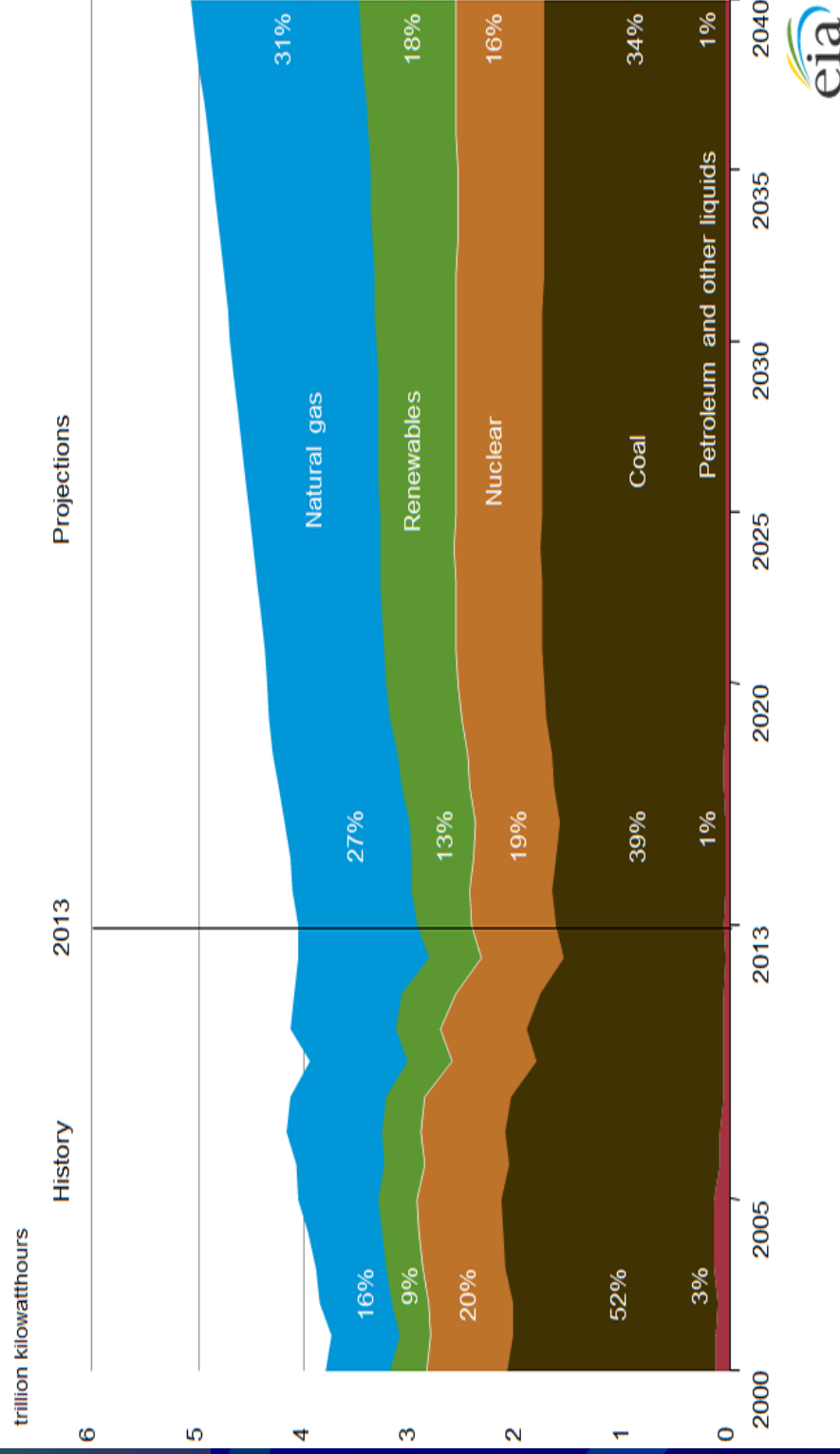


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EIA 2015 Report

Figure 31. Electricity generation by fuel in the Reference case, 2000-2040



Demand is strong

- The demand for fly ash for cement and concrete production continues to grow
- FGD gypsum is now used in 50% of the wallboard produced in the US
- 33 states now permit the use of FGD gypsum in agriculture



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Summary

- Regulatory uncertainty paused the growth in CCP recycling in 2008
- The death of coal is greatly exaggerated
- CCP demand is stronger than ever
- Regulatory certainty will unleash the money needed to grow supply



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Thank You

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