

# The role of coal and LNG in Asia's future energy mix: defying the odds?

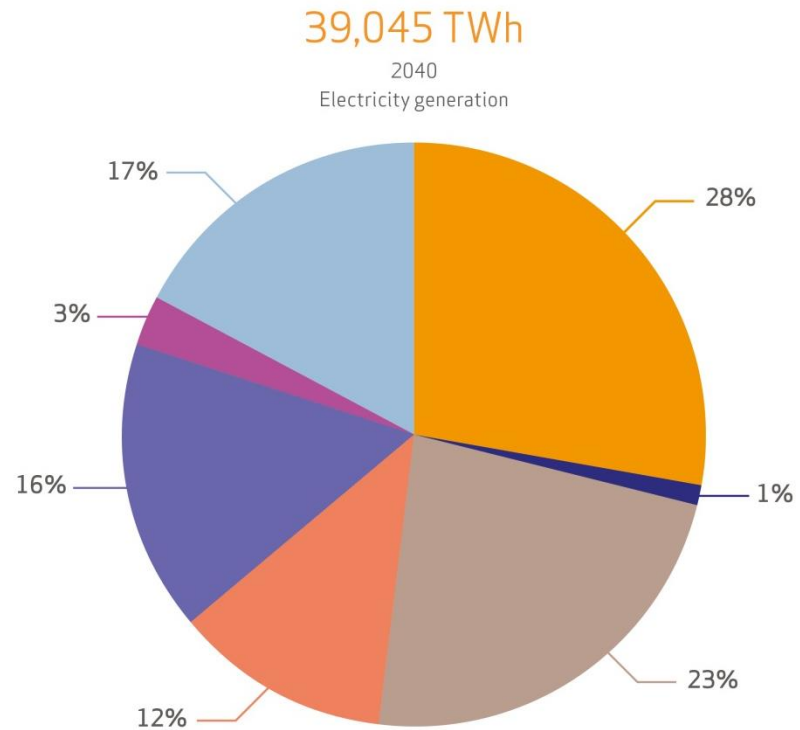
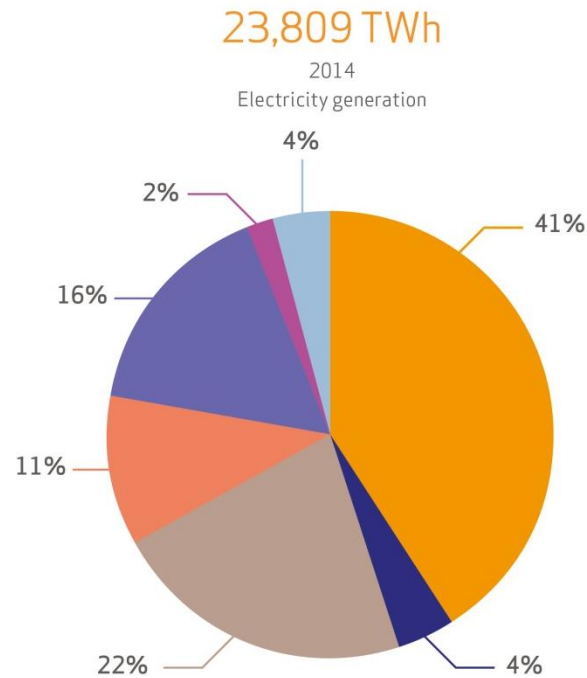
IEEJ Roundtable for Singapore International Energy Week 2017

Benjamin Sporton, Chief Executive



# As global electricity changes, coal retains an edge

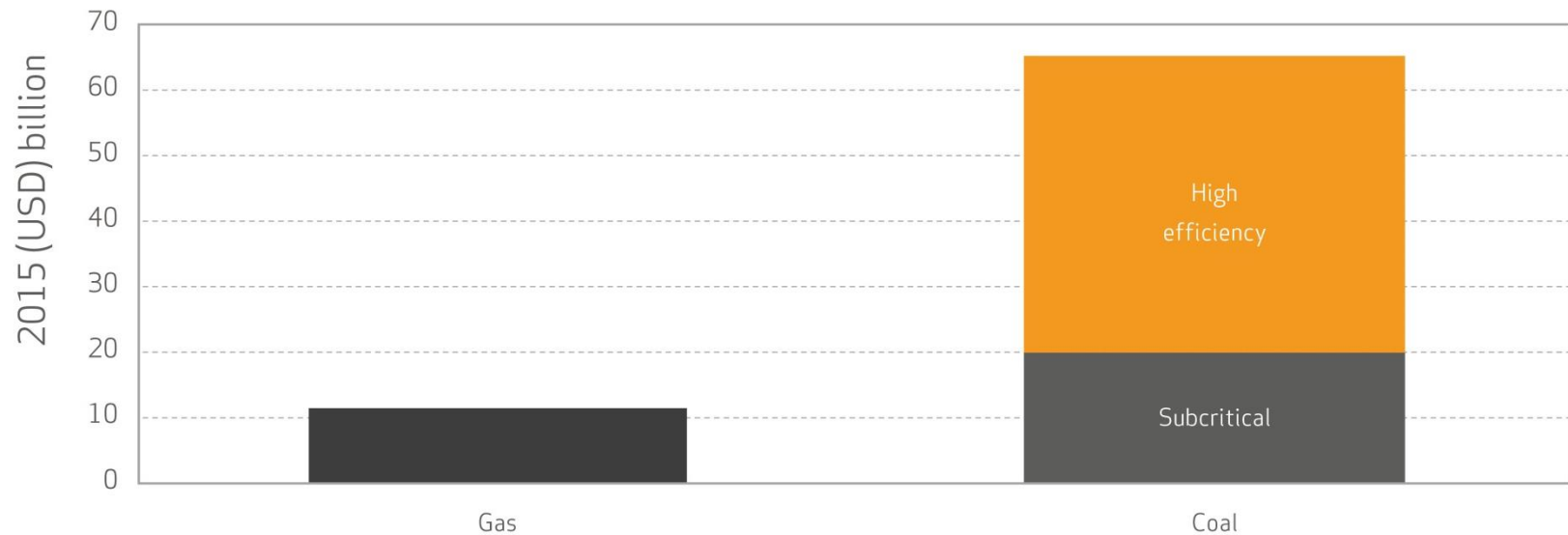
## Global electricity mix



Source: International Energy Agency, World Energy Outlook 2016

# Coal, not gas, leads the charge in Asia...

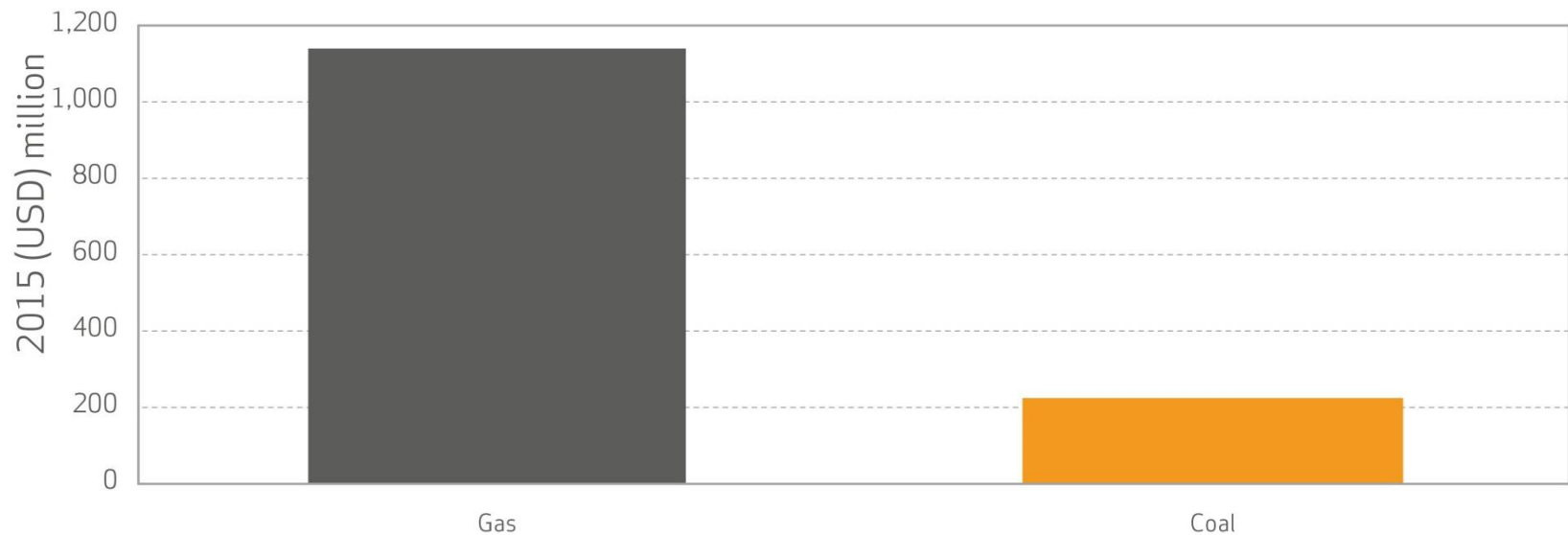
Coal and gas-fired power investment in Asian markets (2015)



Source: International Energy Agency, World Energy Outlook 2016

... because its costs are far lower

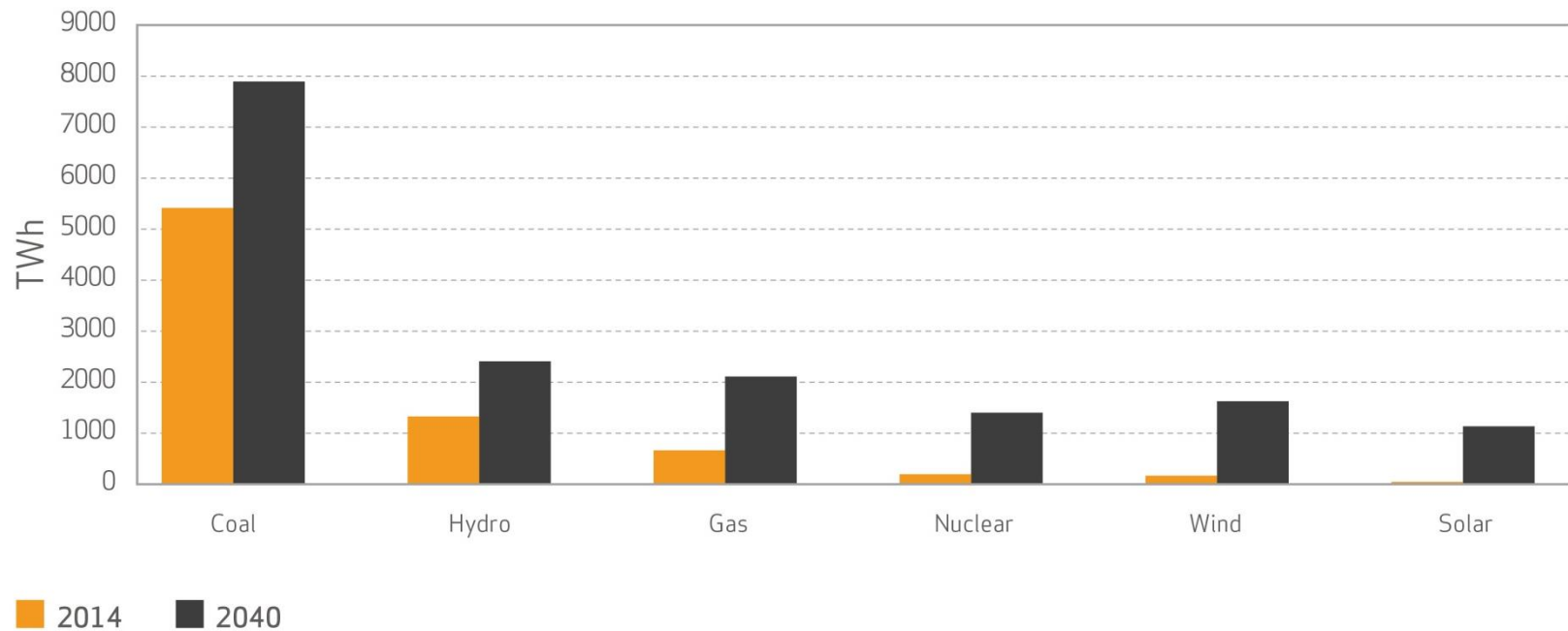
Infrastructure investment cost for a 1 GW power plant in Asia



Source: International Energy Agency, World Energy Outlook 2016

# Coal will dominate Asian electricity for decades

## Non-OECD Asia electricity generation

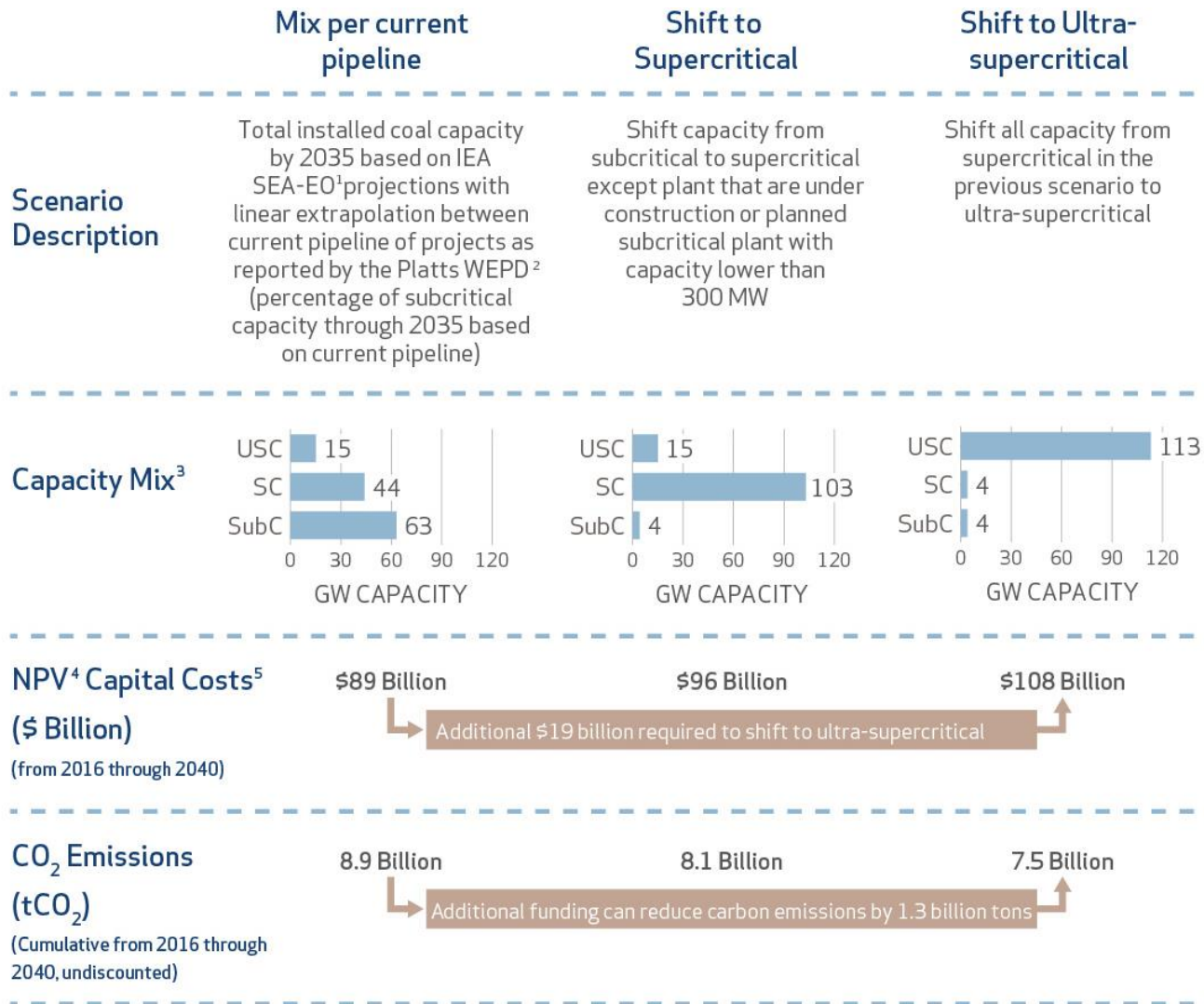


Source: International Energy Agency, World Energy Outlook 2016

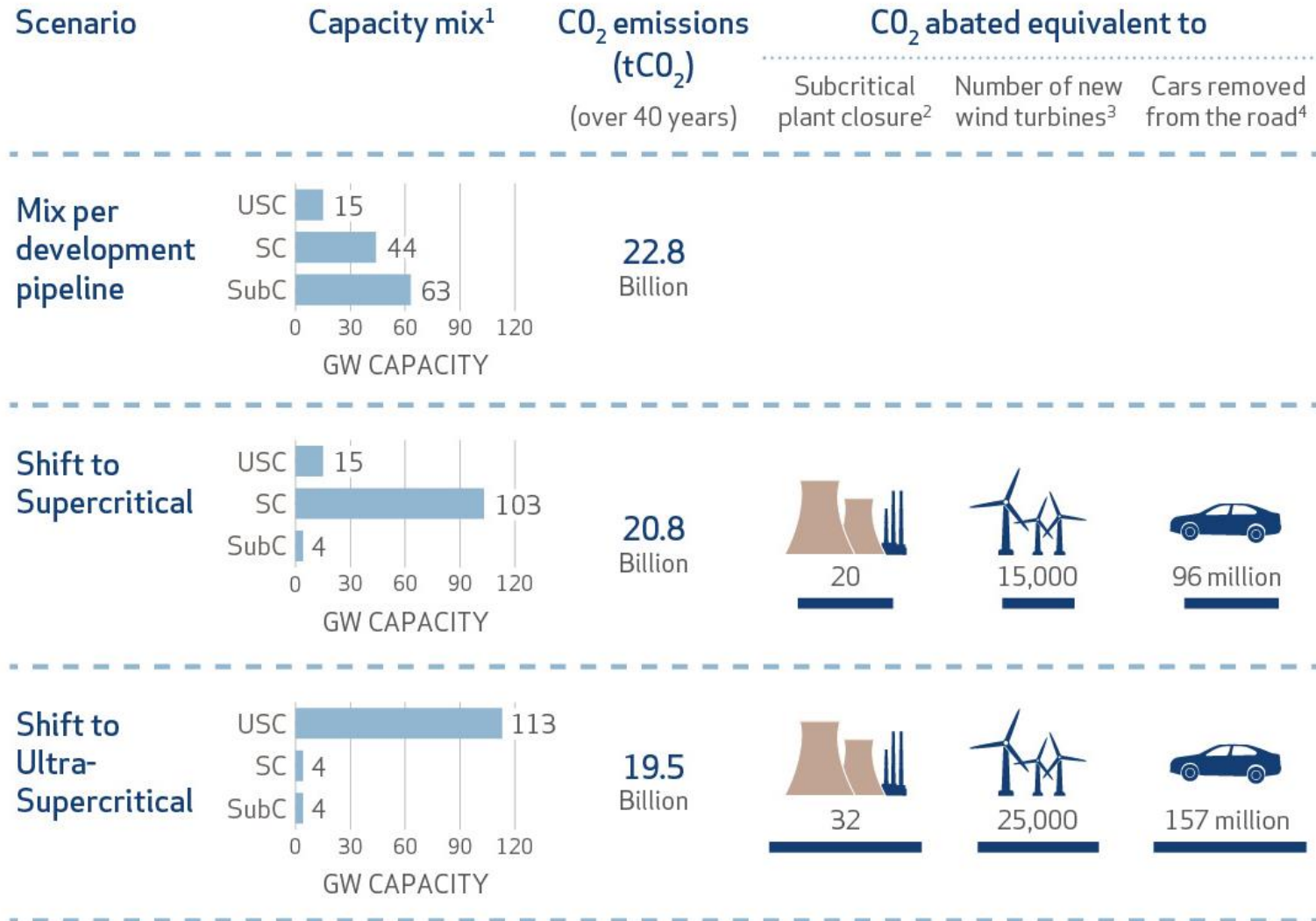
# The Paris Agreement includes low emissions coal



# ASEAN's first step to cleaner coal is possible



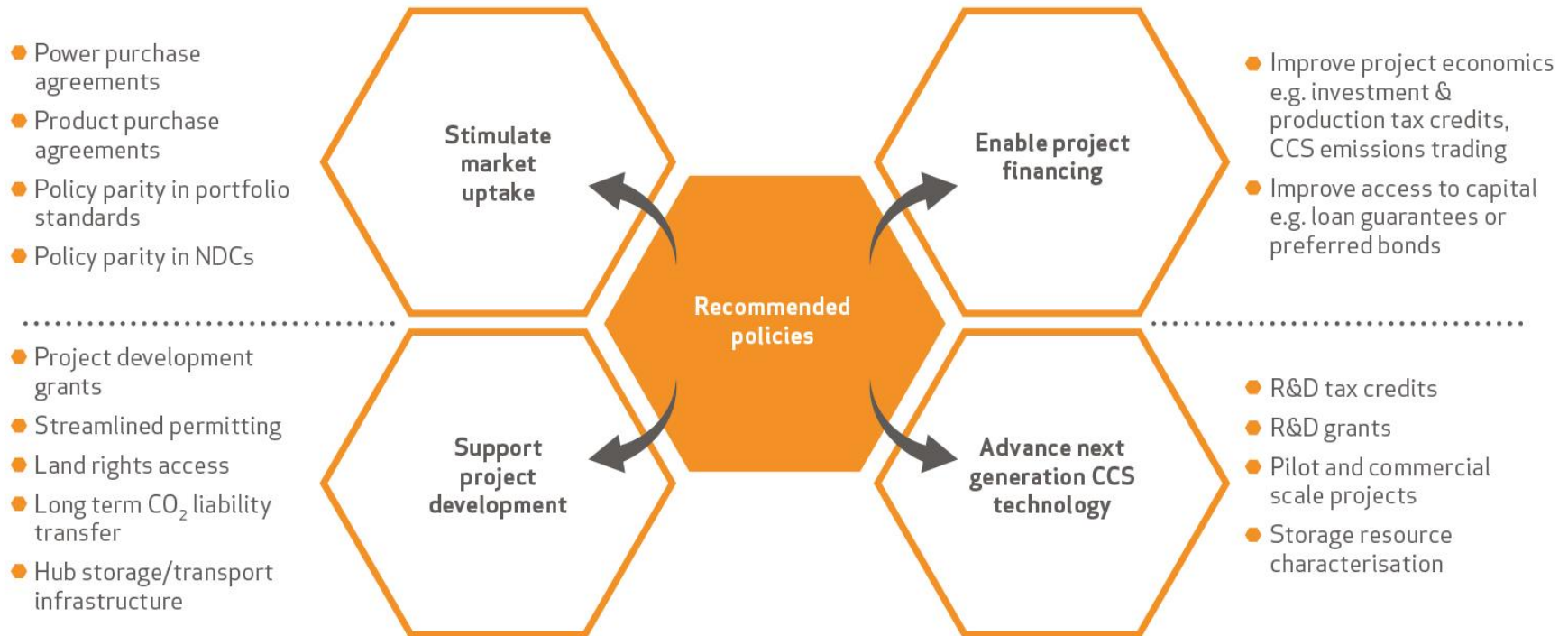
# ... and the benefits are significant





# New policies are required to drive CCS

Policies and incentives are required to stimulate second generation CCS investments



Source: CIAB, An international commitment to CCS; policies and incentives to enable a low-carbon future, 2016