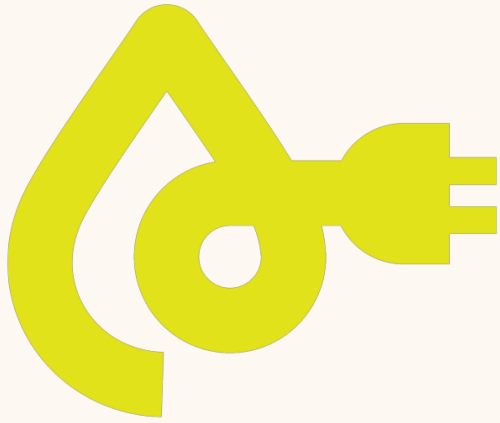




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Advising Greentech companies
to help maximize growth

Coal is like the “cockroach” of the
clean energy movement



Every time you think it's dead,
another one comes out of the
woodwork



**Coal now trails
renewables in overall
power generation
in the U.S.**

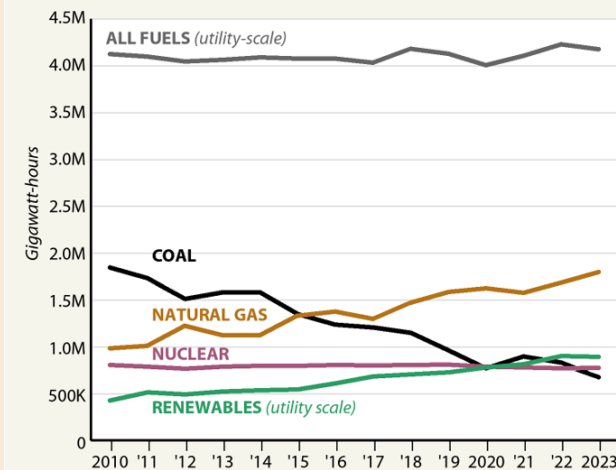
Coal is on its last legs in the U.S.

From Leader to Laggard

In less than a decade, coal has fallen from the country's leading fuel for power plants and now trails natural gas, renewables and nuclear.

U.S. ELECTRICITY GENERATION

By fuel type, in gigawatt-hours, 2010-2023



SOURCE: EIA

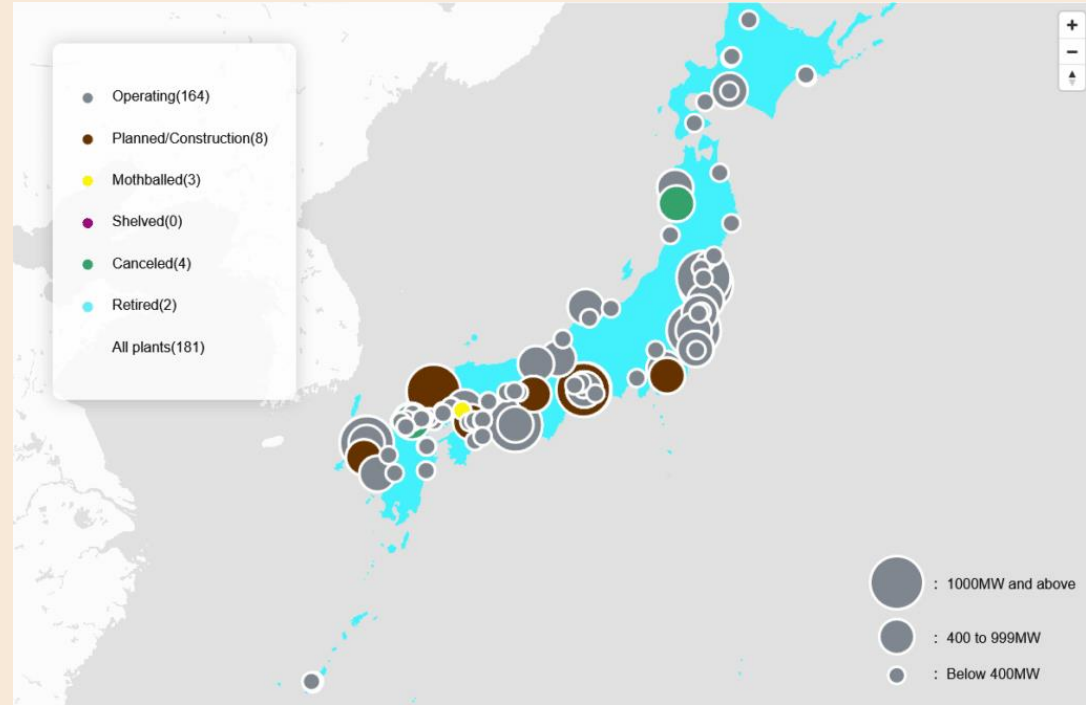
PAUL HORN / Inside Climate News

- Only a decade ago, coal generated about half of the United States' electricity.
- It may be a decade or more until the last coal plant is closed, but coal's role is consistently diminishing.
- In 2023 coal-fired plants generated only 16.2% of U.S. electricity, down from 19.7% in 2022.

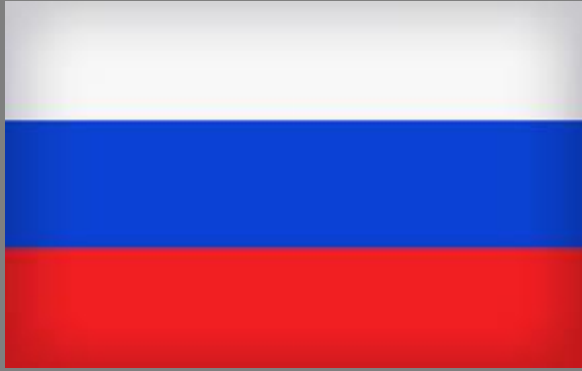


The accident at Fukushima caused a ripple effect in Japan's electricity mix

The story is much different in Japan



- Before the nuclear sector was shut down, its 50 reactors supplied about a third of Japan's electricity.
- As a consequence, the importance of coal has risen.
- According to Statista, as of the end of 2023, Japan had 93 coal-fired plants in operation that supplied close to a third of the country's power.



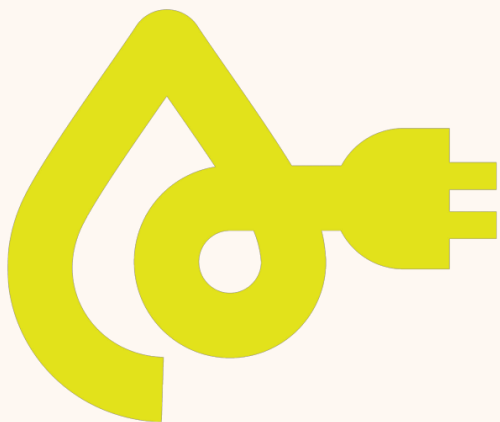
New technology lessens the environmental impact – to a degree



The 650-MW Yokosuka Thermal Power Station Unit 2 came online in December 2023 uses USC technology

New ultra-supercritical (USC) power generation systems reduce emission

- Japan has committed to no longer building what it calls “unabated coal-fired power plants”.
- At best, USC technology can increase efficiency rates by 13 percentage points above coal’s global average.
- CO₂ emissions are reduced by 2 percentage points for every percentage point of efficiency gained. That translates into 26% less emissions - Good not great.



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Unbiased and Unfiltered

- An honest assessment of the climate change effort.
- I cover what's working – but more important - the issues/roadblocks that the industry would prefer to ignore.
- A must-read for anyone with a desire to understand what's really going on with renewable energy and climate change.



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