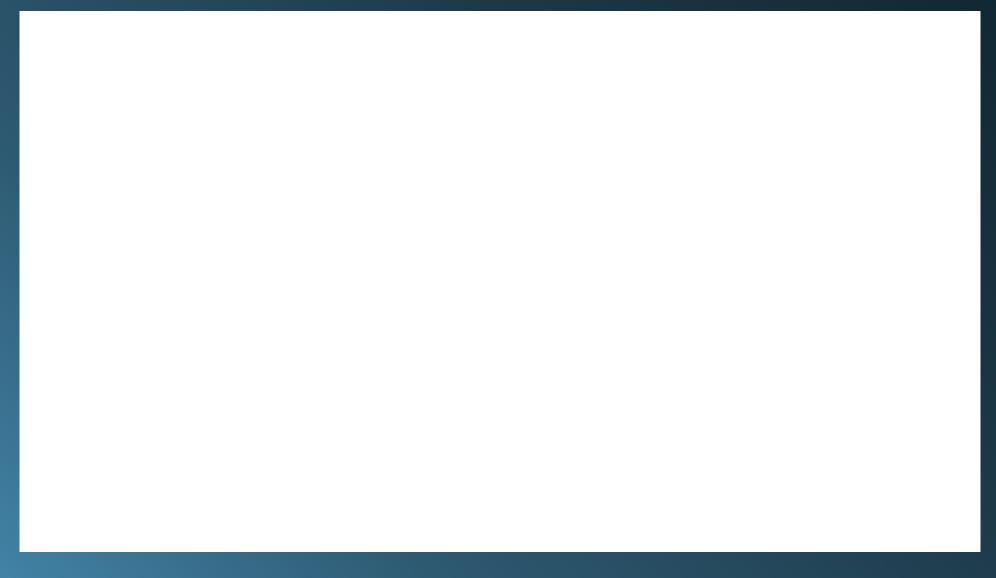


20 October 2020





GREEN AMMONIA PRODUCTION & EXPORT

Feasibility Study conducted in 2019 by German technology company thyssenkrupp.

16GW wind generation

+10GW solar generation

14GW of electrolysers

1.75 million Tpa of green hydrogen

9.9 million Tpa green ammonia (27,000 Tpd)

Export of green ammonia:

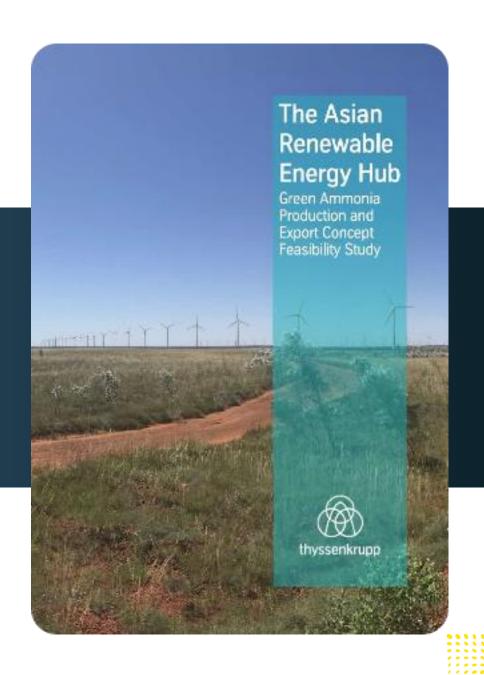
Long term price certainty.

Long term fuel supply certainty.

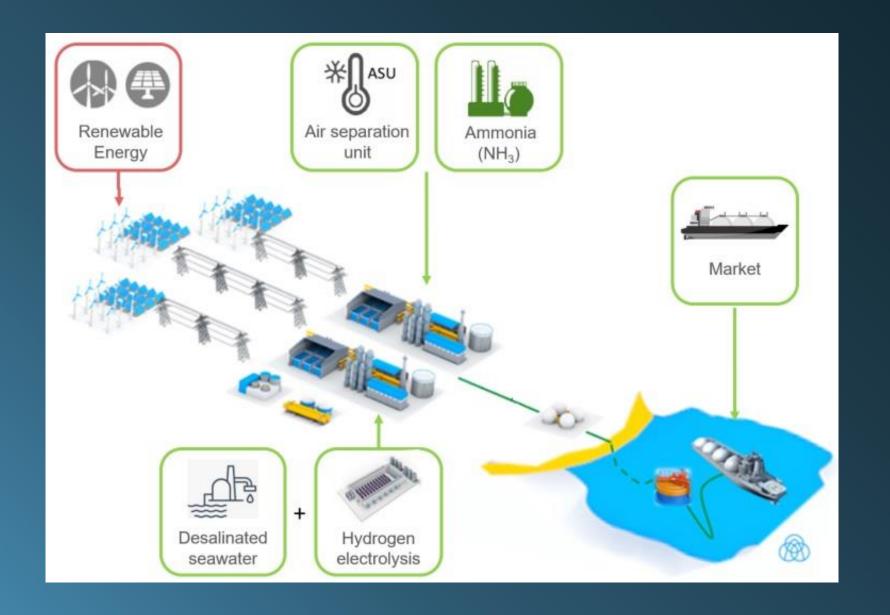
No carbon risk.

Western Australia:

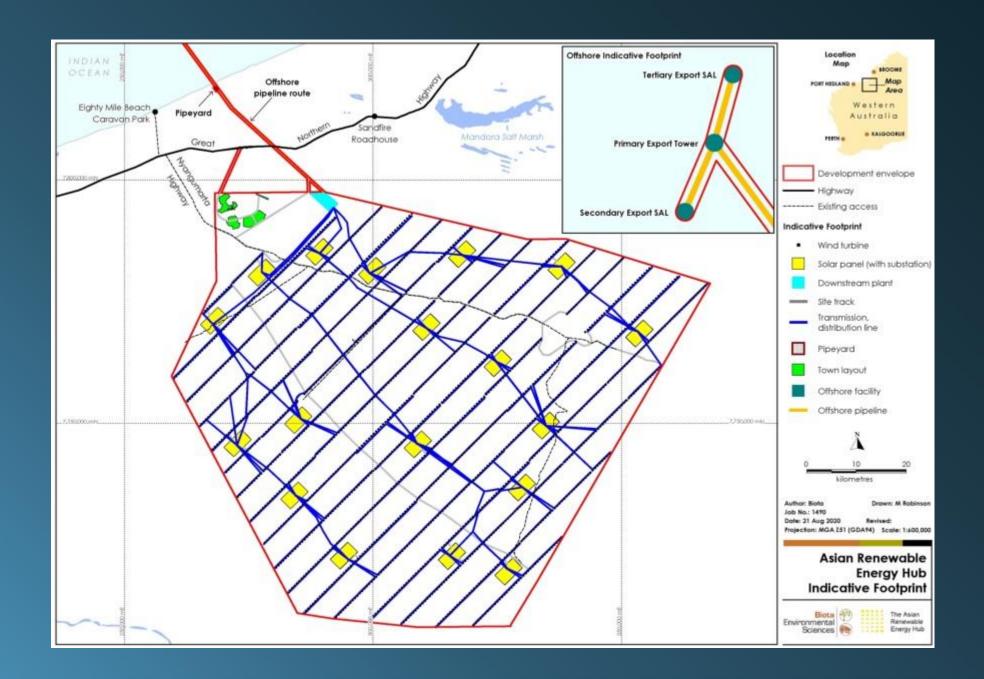
Investment security and low geopolitical risk.











GREEN AMMONIA PRODUCTION DRIVERS

Green ammonia production is very different from brown/blue ammonia production

Matching Upstream variable generation to Downstream process requirements

- Choose a site with solar <u>and</u> wind, and windy at night
- Combine wind, solar and electrolysis in the right proportions
- Maximise the dispatchable loads (desalination, electrolysis etc)
- Use enough (but not too much) hydrogen storage
- Ammonia synthesis "rocks and pebbles"

The benefits of massive scale

- Allows faster global decarbonisation
- Reduces upstream variability
- Increases the ability to use alkaline electrolysers (cheaper and longer life than PEM)
- Reduces LCoA and delivery risks through successive implementation phases (start small and grow big)
- Increases flexibility with multiple ammonia synthesis trains ("rocks and pebbles")
- Localise manufacturing / maintenance facilities
- Automation / robotics efficiencies
- Gives confidence to large emerging markets that supply can scale with demand
- Allows servicing of multiple offtake markets and sector coupling







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