

BCSAF clinkers

A credible low carbon alternative to Portland Cement

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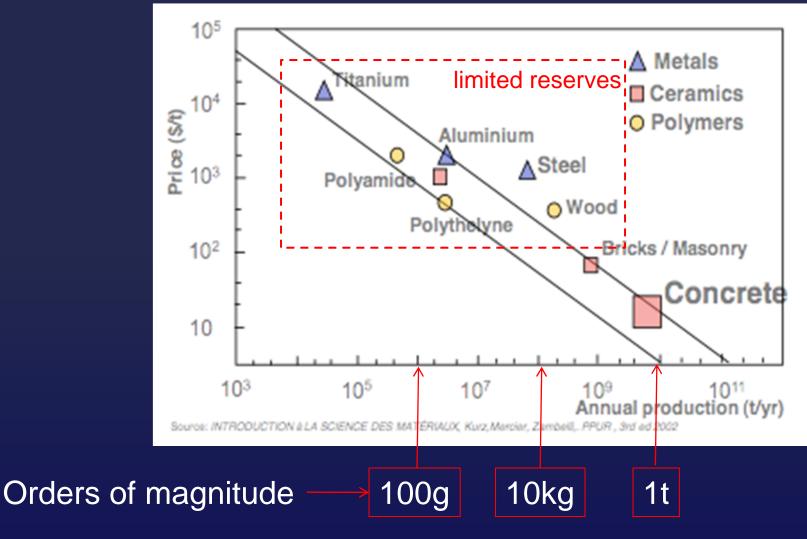
Cement and Concrete are not the "bad guys" we hear too often...

Conservative estimation of the amount of concrete produced every year on the planet:

15,000,000,000 t

...over 2t/inhabitants

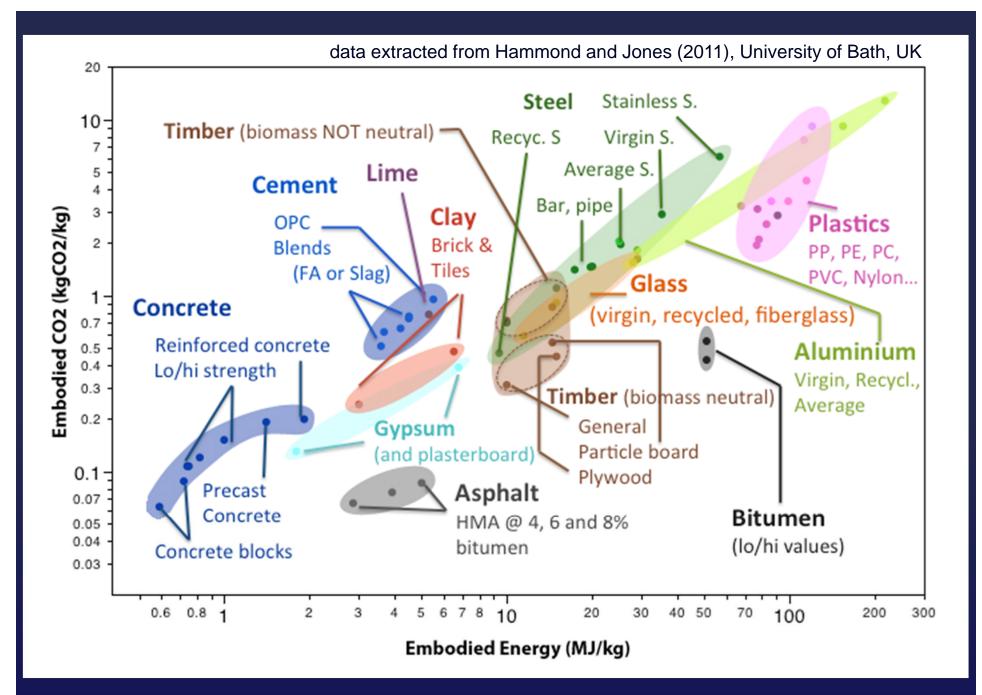
... and there are good reasons for this ...



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Cost Local availability in large quantities Ease of use Relative robustness to misuse Versatility Durability

. . .





Of course, we need to develop "greener" cement and concrete...

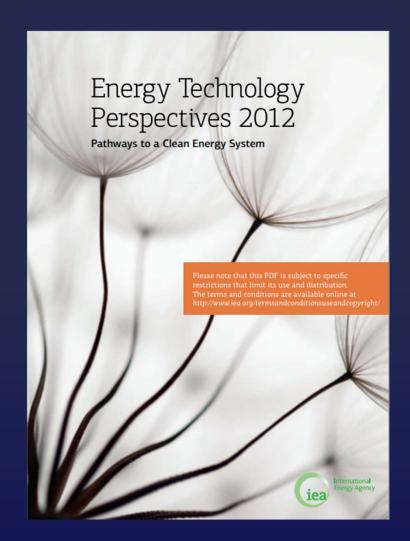
IEA Blue Map Scenarios

Mandated by G20 to work on long-term scenarios of carbon reduction (2050);

2012 update provides BAU scenario (eq. +6° C) as well as +4° C and +2° C scenarios by 2050

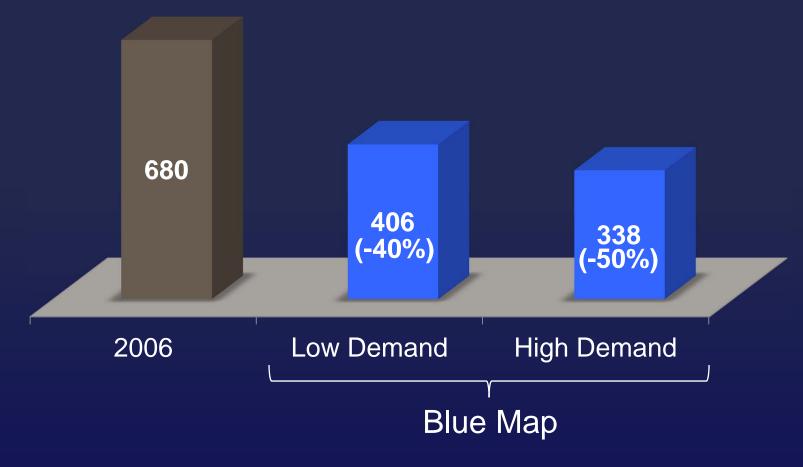
Promote a sectorial approach as the least cost way to reduce carbon emissions

Lead the development of technology roadmaps in key areas. One developed for the cement industry!



The Cement Industry Technology Roadmap to Reduce Carbon Emissions

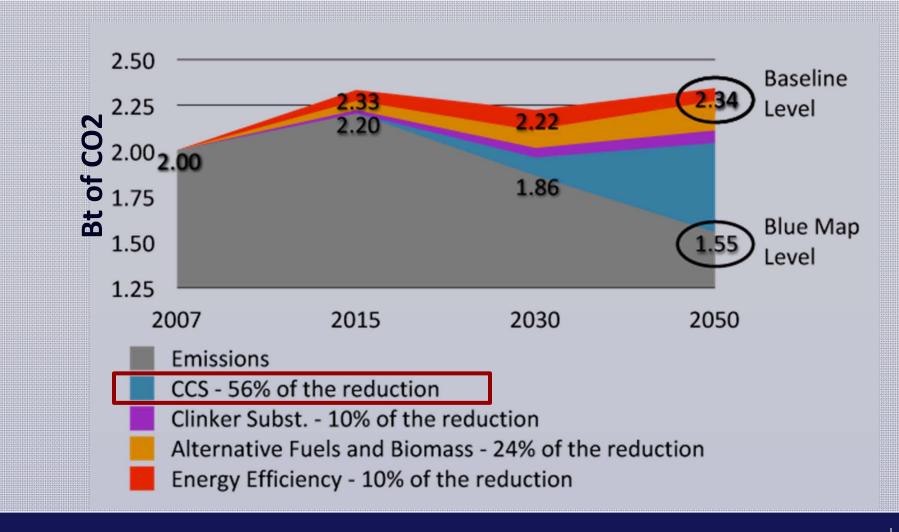
In terms of specific emissions (kg of CO2 per ton of cement):





We need to go beyond the traditional levers that the industry has been using

The IEA & WBCSD cement technology Roadmap for carbon reduction





We need to be creative for the use of cementitious additives

Estimation of WW cementitious reserves made by IEA

Table 3.5 Availability of clinker substitutes in the BLUE scenario, 2005 and 2050

| | 2005 (Mt) | 2050 (Mt) |
|--|---------------------|---------------------|
| Fly ash | 590 | 368 |
| Blast-furnace slag | 308 | 364 |
| Other clinker substitutes | 50 | 100 |
| Other additions, e.g. ground limestone | 267 | 500 |
| Total | 1 215 | 1 332 |

=> Fly-ash based geopolymers cannot be a global solution!=> Fly-ash and slag may not be carbon neutral in the future



We may need to develop alternative clinkers...

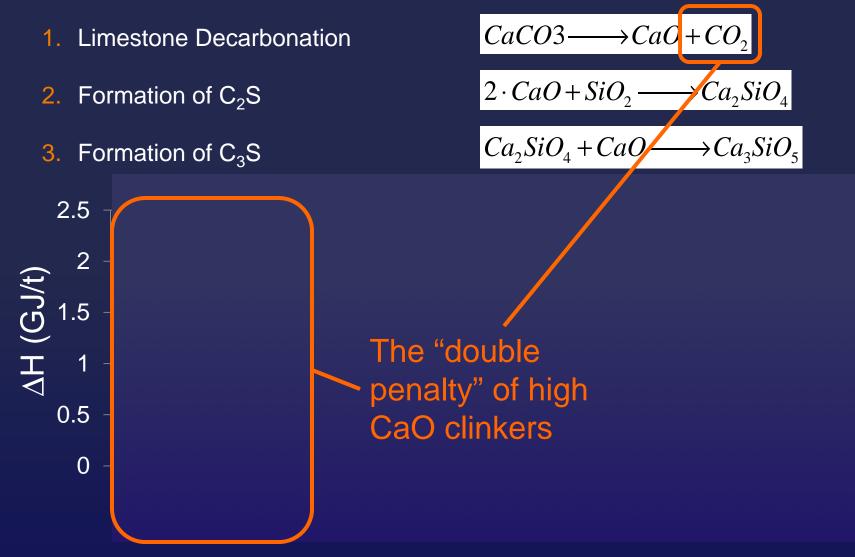
3 main levers to reduce CO2 emissions

Direct CO₂ emissions in Cement Manufacture

| CO ₂ from Limestone calcination (fairly constant from plant to plant) | ⇔ | ~535 kg/t clinker + |
|---|--------|------------------------|
| CO ₂ from fuels combustion (larger variations from plant to plant | , ¢> | ~330 kg/t clinker = |
| Direct CO ₂ emissions for clinker | ⇔ | ~865 kg/t clinker |
| Average clinker content in cement (2006 value from CSI) | ⇔ | × 78% = |
| Direct CO ₂ emissions for cement | \Box | ~680 kg/t cement |

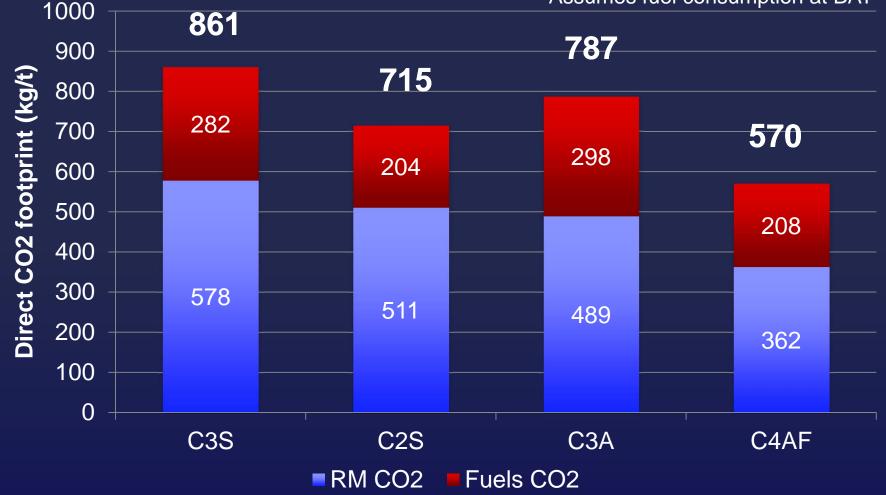
To what extent we can reduce this through clinker formulation?

Energy Required for C₃S formation

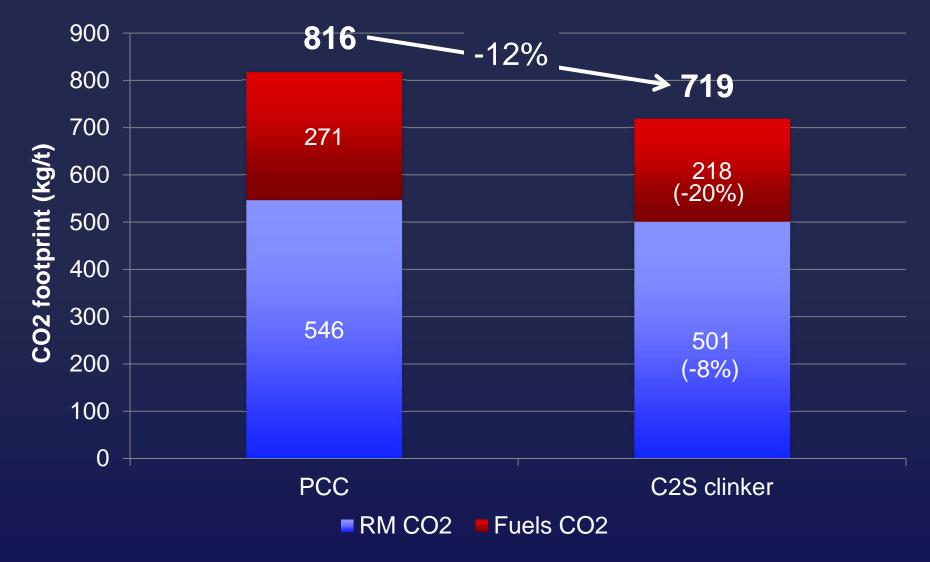


Clinker formulation: Traditional PCC

Assumes all CaO from CaCO3; Assumes bituminous Coal as fuel; Assumes fuel consumption at BAT



Clinker formulation : theoretical C2S clinker



What are the characteristics of the solution we're looking for?

A clinker that leverages all the current clinker advantages:

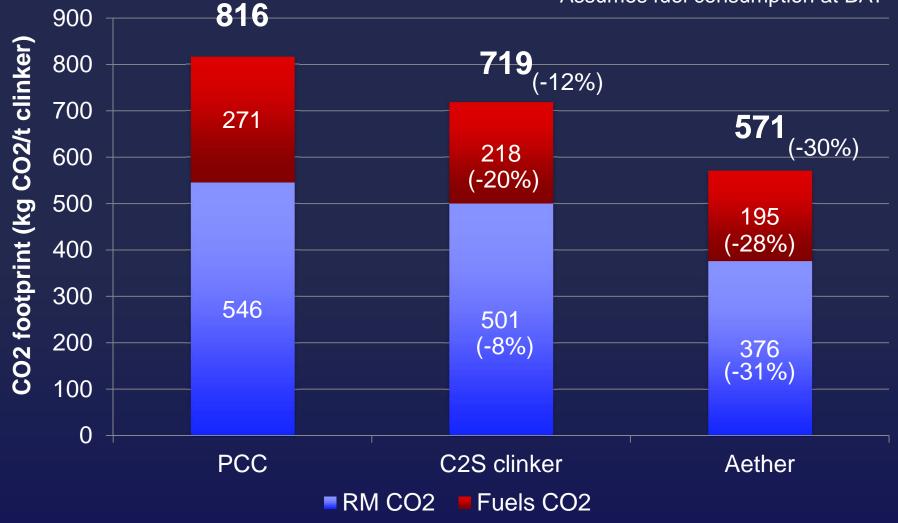
- Made from raw materials locally available in large quantities
- Cheap
- A high level of early reactivity (similar to OPC) to work well with SCMs
- Durable (including steel protection)

And in addition:

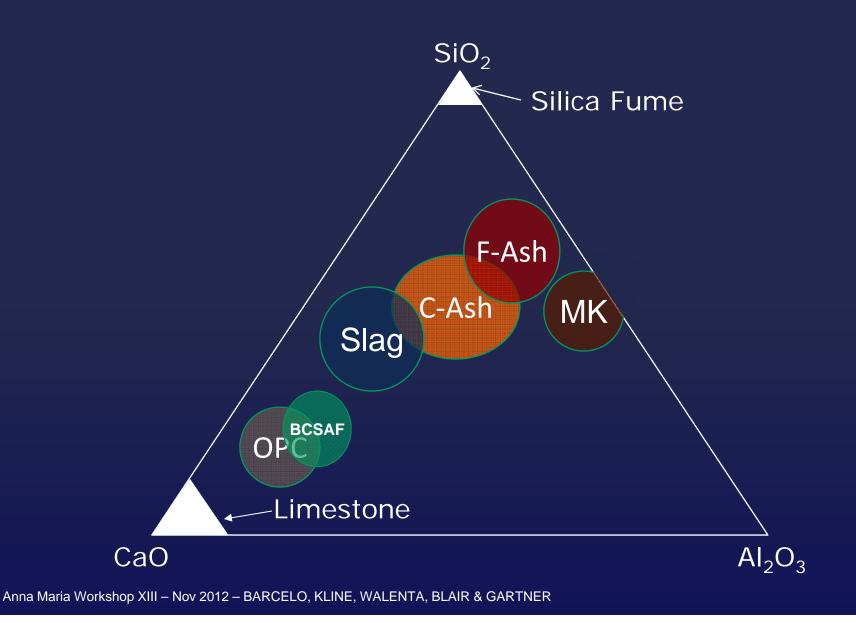
- A much lower CaO content to reduce significantly CO2 emissions;
- Can be manufactured in existing plants

A Carbon footprint reduced by 30%

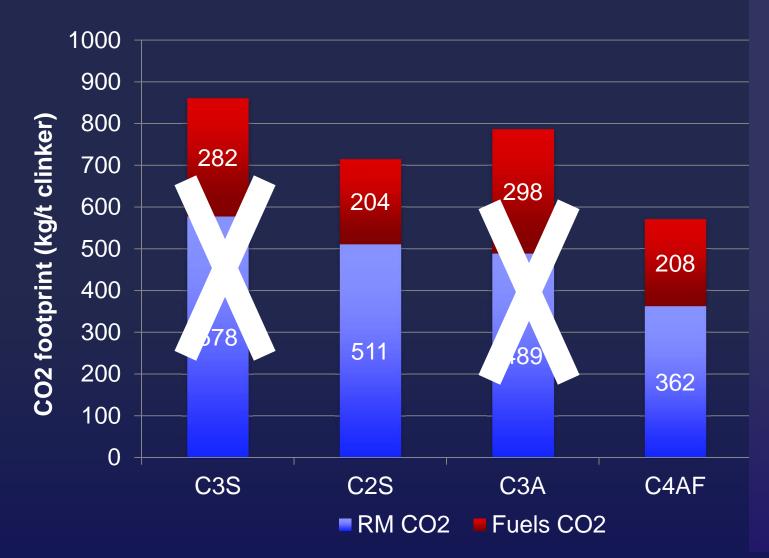
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BCSAF on C-A-S triangle:



Components of the BCSAF clinkers



Key benefits of BCSAF clinkers (Aether[™])

- Reduction of up to 30% of the CO₂ footprint of clinker manufacturing
- Potential additional saving on indirect CO2 from electricity, as clinker is easier to grind
- Gives high level of early reactivity, allowing us to maintain clinker substitution at the same level as with OPC
- Later strength development similar to OPC
- Can be manufactured in existing cement plants: No need for heavy capital expenditure. Possibility of production rate increases.
- Already demonstrated at industrial scale, in a real clinker kiln.

Thank you for your attention !!



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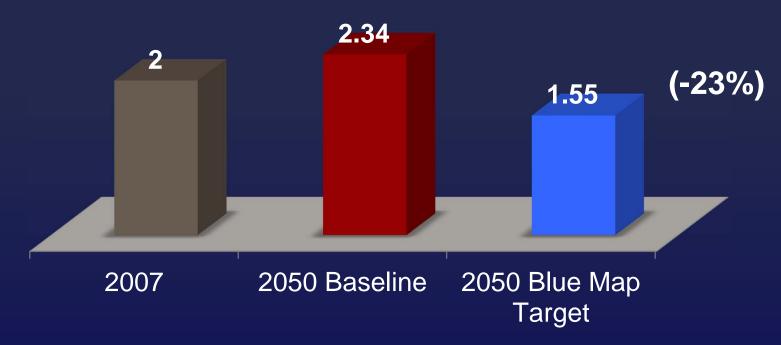
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| | | X |
| Average clinker content in cement | $\Box \!$ | 78% |
| (2006 value from CSI) | | <u> </u> |
| | | — |
| Direct CO_2 emissions for cement | | - ~680 kg/t cement |

Appendix

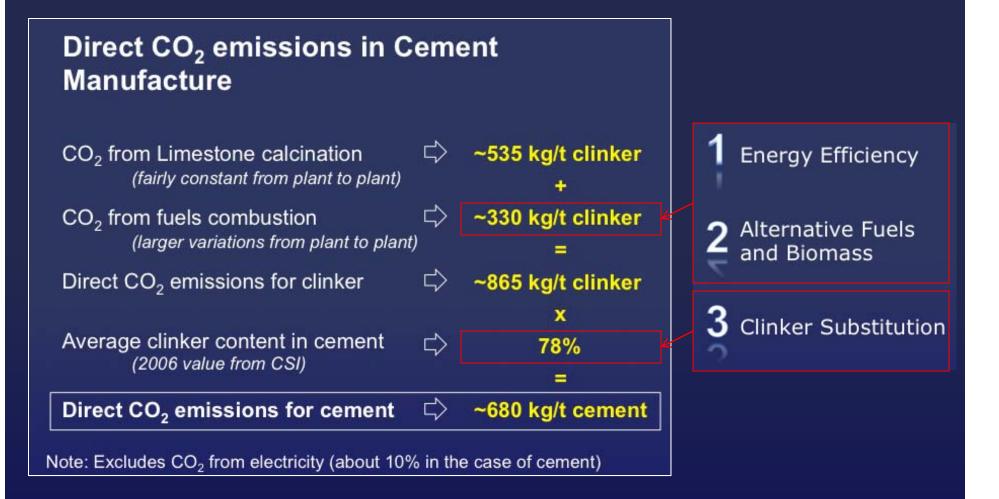
The Cement Industry Technology Roadmap to Reduce Carbon Emissions

Cement Sustainability Initiative (CSI) and IEA partnered to establish a roadmap for the cement industry:



(in billion of tons of CO2)

3 main levers to reduce CO2 emissions

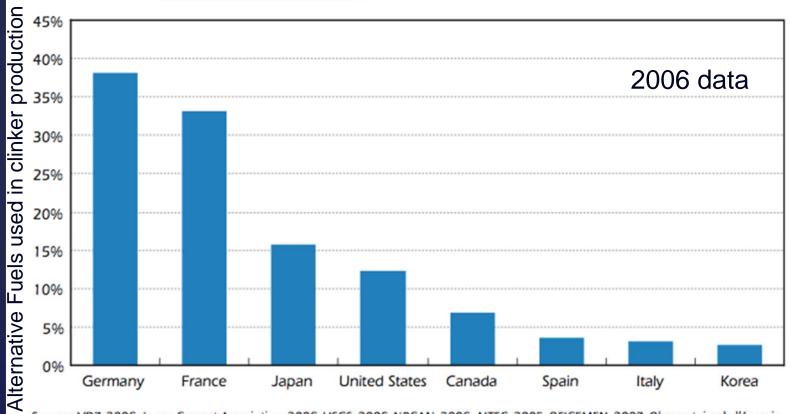


1. Energy Efficiency

| Process | Typical Fuel Consumtion (GJ/t) | Efficiency (%) |
|---------------------------------|-----------------------------------|-------------------|
| Theoretical consumption | 1.75 | |
| Vertical Shaft Kilns | ~5 | 35% |
| Wet Kilns | 5.9 - 6.7 | 25-30% |
| Dry Kilns | | |
| Long Dry Kilns | 4.6 | 38% |
| 2 Stages Pre-Heater (PH) | 3.8 | 46% |
| 4 Stages PH | 3.3 | 53% |
| 4 Stages PH + Pre-Calciner (PC) | 3.1 | 56% |
| 5 Stages PH+PC (BAT)* | 3 | 58% |

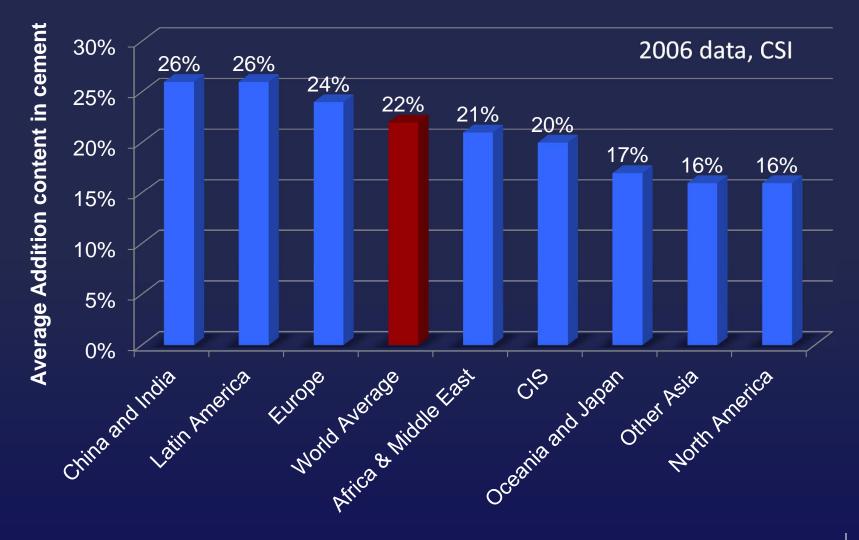
* Industry's Best Available Technology

2. Alternative Fuels and Biomass



Sources: VDZ, 2006; Japan Cement Association, 2006; USGS, 2006; NRCAN, 2006; AITEC, 2005; OFICEMEN, 2007; Observatoire de l'énergie, 2003; and Dong-Woon, 2006.

3. Clinker Substitution



Clinker formulation: Traditional PCC

| | CaO content (%) | ∆H (Gj/t) |
|-----------|--------------------|--------------|
| C3S | 74% | 1.85 |
| C2S | 65% | 1.34 |
| C3A | 62% | 1.95 |
| C4AF | 46% | 1.36 |
| Free lime | 100% | 3.18 |

Challenges

Cost of raw-materials can be a little bit higher.

- Some level of taxation of CO₂ needs to happen to make AetherTM commercially viable at large scale.
- Additional cost compared to PCC is nevertheless about one order of magnitude lower than CCS
- Cement and Concrete science has 100+ years of R&D and still many aspects are not fully mastered. We have just scratched the surface!
- Specifications, acceptance, etc..

The IEA predicts that CO_2 emissions need to be **cut in half** to maintain temperature rise to +3° C (+5° F)

sectorial approach as the least cost way to reduce emissions
The cement industry

IEA proposes a

The cement industry is a **large contributor** to CO2 emissions, more because of production **volumes** than intrinsic performance

The cement industry and IEA partnered to build a **technology roadmap** for CO₂ reduction The roadmap calls for 23% reduction of absolute CO₂ emissions and 40 to 50% of specific emissions.

Lafarge is proposing **one novel approach** to help reduce carbon emissions through **clinker reformulation**. **BCSAF clinkers** (AetherTM) have the opportunity to **reduce by up to 30%** the CO₂ footprint of clinker manufacturing Existing levers (energy eff., clinker subst.) should lead us half-way. High costs forecast for CCS