

Energy and the Environment

Increasing growth opportunities

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AIR
PRODUCTS 

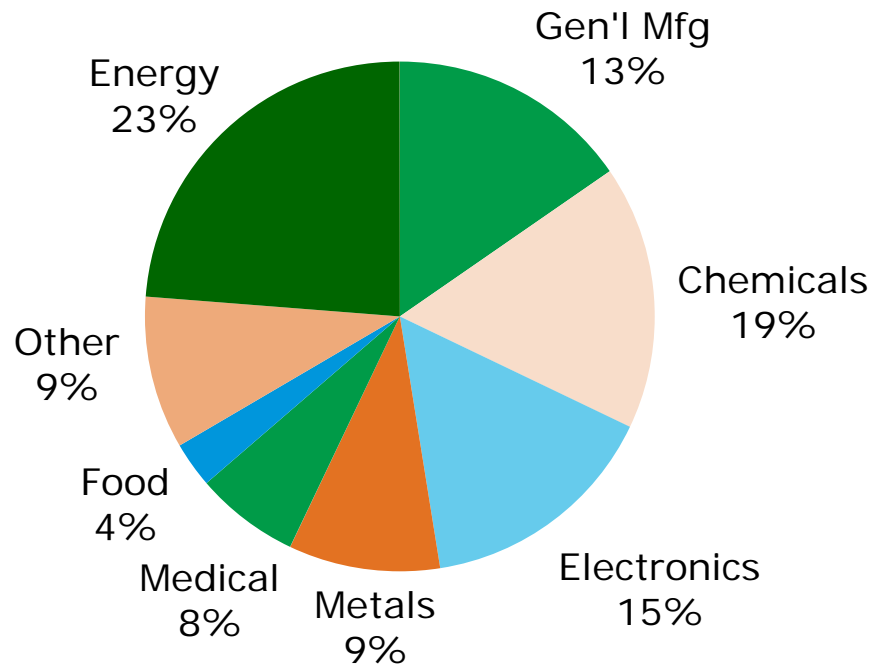
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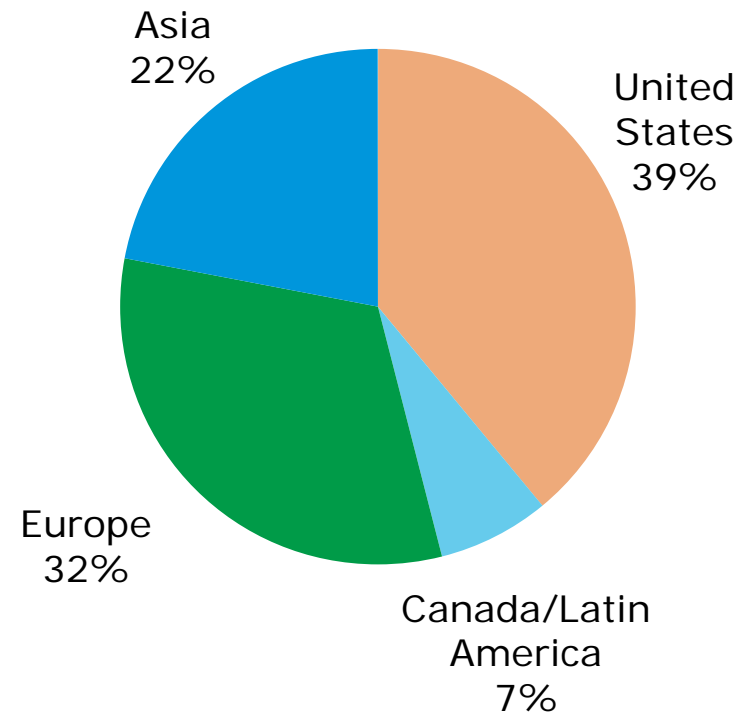
Diverse Markets and Geographies

- Well positioned for continued long-term value creation

End Markets



Geographic Sales



Providing Solutions for Clean Energy *Industry Leadership*

Resource conservation
and energy efficiency

Power generation
development

Technology to make use
of non-conventional fuel
sources

Natural gas (remote and
non-conventional)
solutions

Hydrogen solutions
for refiners to enable
cleaner burning
conventional fuels

***Providing Energy &
Environmental Solutions
for
Today's Needs . . .
Preparing
Solutions for Tomorrow's***

Technology and
infrastructure enabling
the development
of a future hydrogen
economy

Clean Energy Solutions

Suite of differentiated
CO₂ capture
technologies including
oxyfuel and pre-
combustion capture

Technology enabling
gasification

Technology to enable
fuel diversity

Industrial Gas Growth Opportunities

Delivering Solutions for a Changing World

Energy



- Hydrogen for refining
- Oxygen for gasification
- LNG heat exchangers
- Gases for photovoltaics
- Efficient Cogeneration

Environment



- Oxyfuel
 - Efficiency for Glass, Steel, etc.
 - Fossil Fuels to low carbon power
- CO₂ capture
- Hydrogen fuels

Emerging Markets



- Electronics across Asia
- Equity Affiliate Positions
- Biofuels and Biomass
- Expanding Merchant positions

Energy and Efficiency

Driving oxygen applications

- Efficiency
 - Steel
 - Refining
 - Cement, glass, aluminum
- Energy
 - Gasification for power, chemicals, hydrogen, etc.
 - Feedstock independence
 - Biogasification and biofuels
- Environment
 - Oxyfuel combustion
 - CO₂ capture



200,000-300,000 tons-per-day new oxygen capacity by 2018
100+ new plants

ITM Revolutionizing O₂ Supply

- Lower unit cost for oxygen
- Energy integration with power and steam generation
- Ideal for gasification / energy applications including oxycombustion
- Proprietary ceramic membrane technology



ITM Prototype operating
in North America

Commercialization Update

- Building 100 TPD test facility with DOE support
- Target on-stream 2011
- Received DOE award supporting acceleration of scale up

Air Products Projects Capturing CO₂ from Fossil Fuel-Based Processes

- Oxyfuel technology for pulverized coal boilers
 - Installing proprietary CO₂ capture, purification and compression system at Vattenfall's pilot, Germany
 - Target on-stream 2011
- Hydrogen production from natural gas with CO₂ capture
 - DOE Phase II Industrial CCS Award, Port Arthur, TX
 - Target on-stream 2012
- Oxyfuel CO₂ Purification in China
 - Shanxi International Energy Group study and reference plant design for 350MW demo project
 - Part of joint U.S.-China Fossil Energy Protocol – Annex II: Clean Fuels



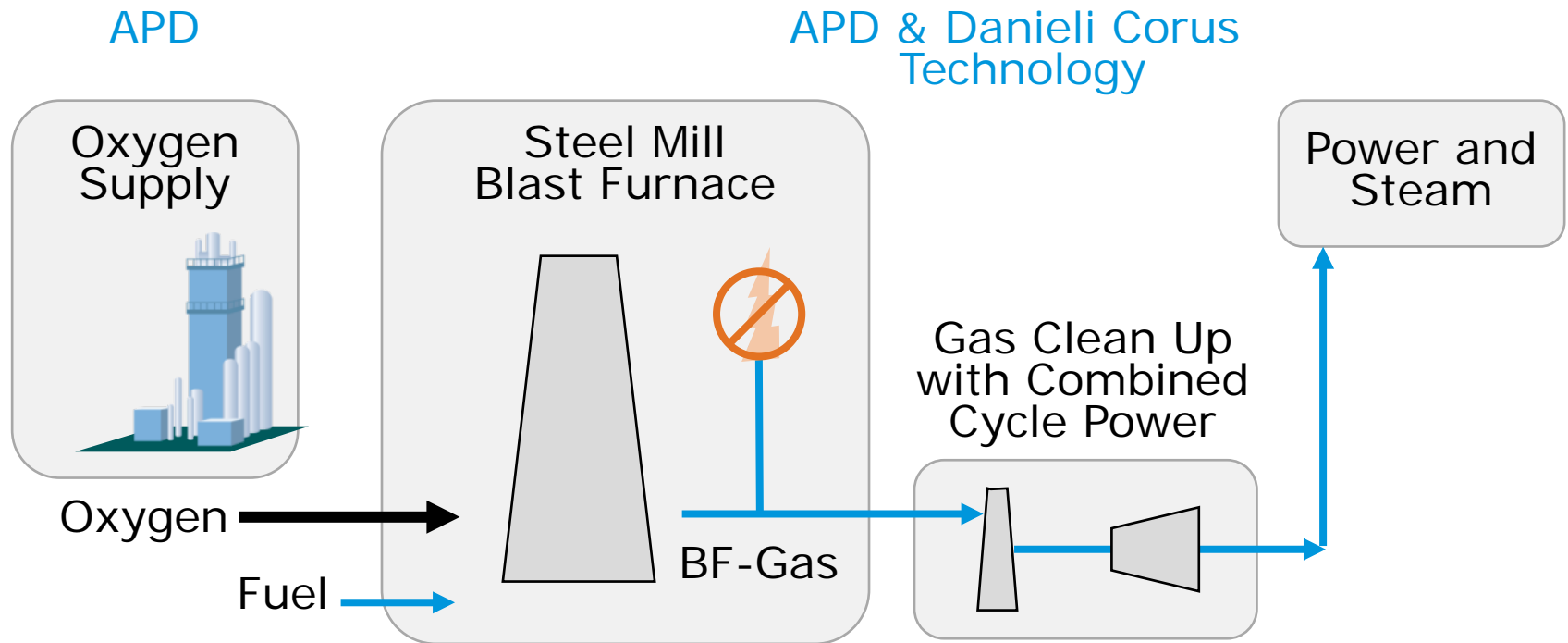
New Initiatives

Tees Valley Renewable Energy Facility

- Proposed 49MW Energy-from-Waste facility using advanced gasification technology
- Currently in the planning & development stage
- Potential for:
 - Renewable electricity for up to 50,000 UK homes
 - Diversion of 300,000 – 350,000 tonnes of non-recyclable waste from landfills



BF Plus – Integrated Iron Making / Power Generation



We offer steel producers the complete package...Lower costs, improved iron making productivity, and a cleaner environment

Global Refining

Solid Growth for Hydrogen, Power & Steam

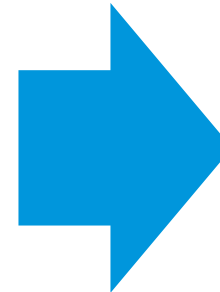
Consumer Growth for Clean Fuels,
Both Population and Economic



Lower quality
crude oil



Ultra-low
Sulfur Fuels



Results in new
balances for

- Hydrogen
- Steam
- Power
- Fuel

For ultra
clean fuels



Global Energy
Markets



Renewable Energy
Supplies

New Hydrogen Application: *Transportation Infrastructure*

Applications Include:

- Material Handling
- H₂ and HCNG Buses
- Trains
- Planes
- Submarines
- Cell-Towers

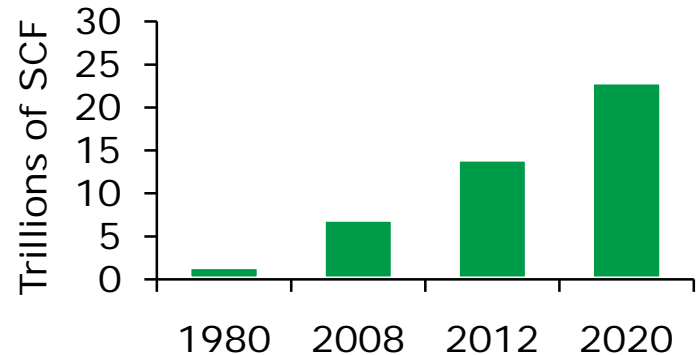


LNG Heat Exchangers

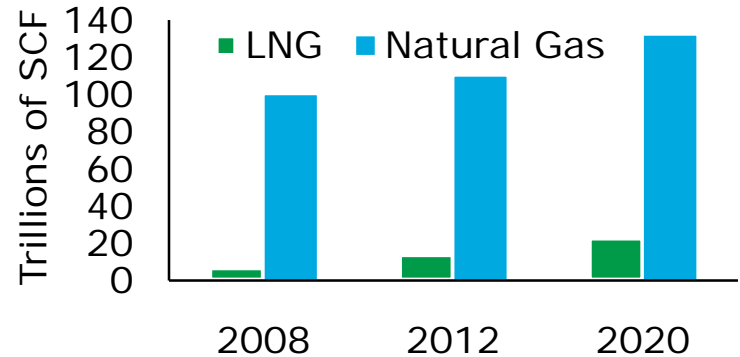
Market Leadership

- APD world leader in natural gas liquefaction technology and equipment
- Sustainable competitive advantage with full complement of technologies
- Significant increase in demand in Asia drives the market
- Anticipate 2-3 LNG orders per year over next 5 years
- LNG global production doubles 2010-2020.

Natural Gas for LNG



LNG Production vs. Global Natural Gas Demand



Sustainability at Air Products

Business Value



Providing innovative solutions for the world's most pressing challenges

Environmental Stewardship



Responsibly managing our footprint through improvements and aggressive goals

Social Responsibility



Improving the quality of life for our employees and plant communities

Governance



Working with integrity and accountability for our stakeholders

Water

- Reduce consumption 10% globally by 2015

Greenhouse Gases

- Reduce by 7% indexed against production by 2015

Thank you...
tell me more

