

Rocks to Riches: Global Geothermal Development

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new energy finance



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roadmap



global development



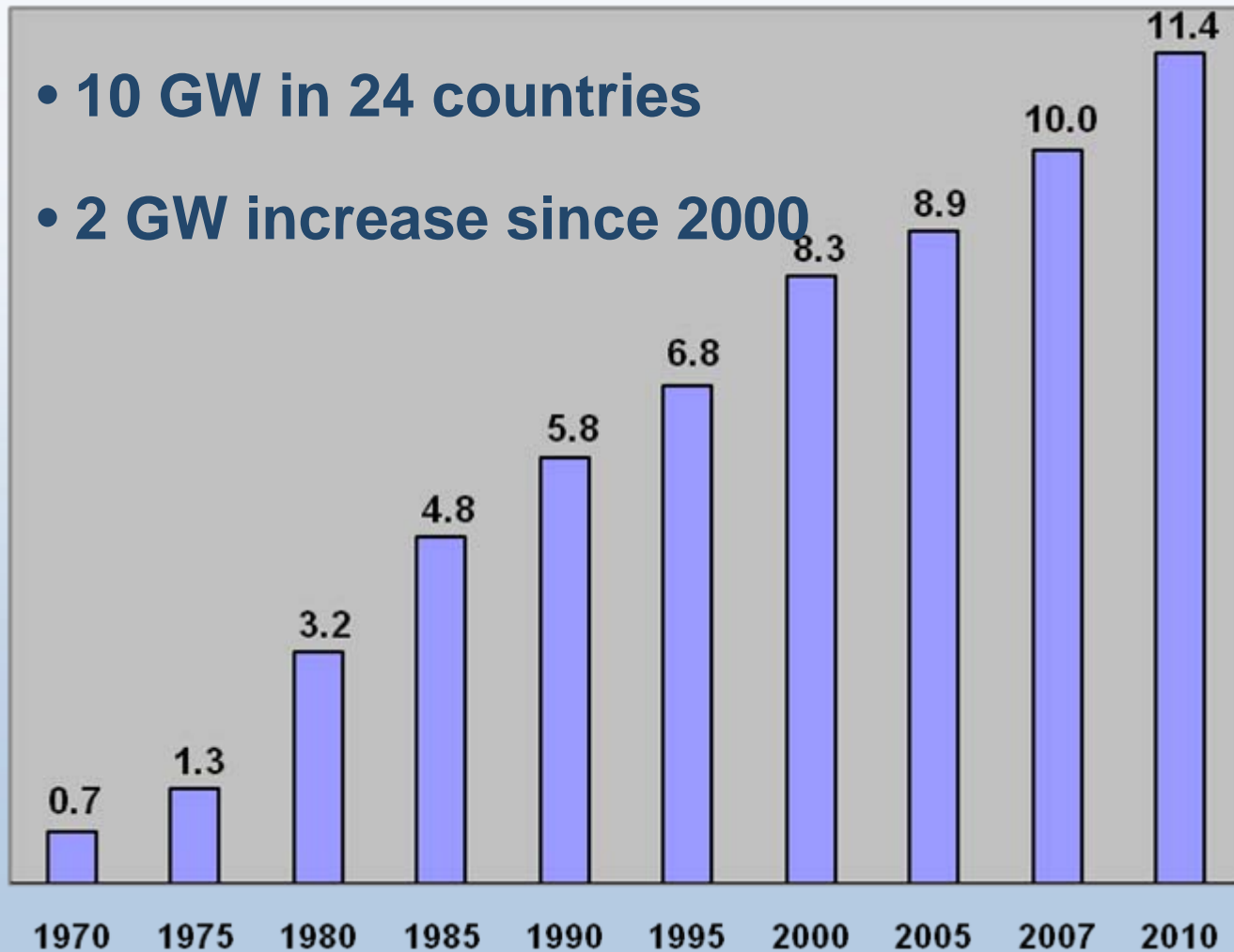
global investment



2007 US BLM geothermal lease sales

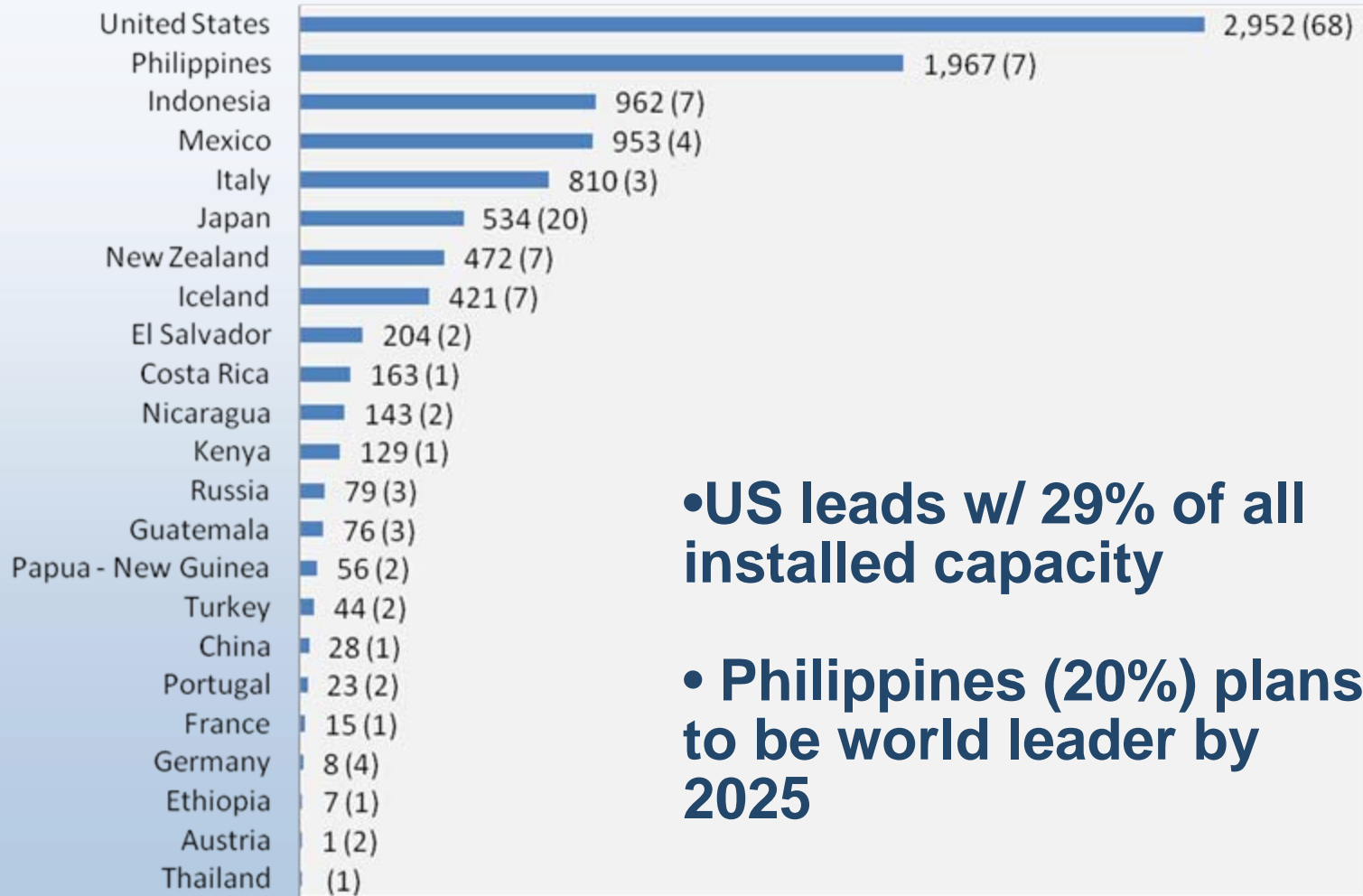
Source: New Energy Finance, 2008

global geothermal capacity 1970-2010: GW



Source: New Energy Finance, 2008

global commissioned capacity: MW (plants)

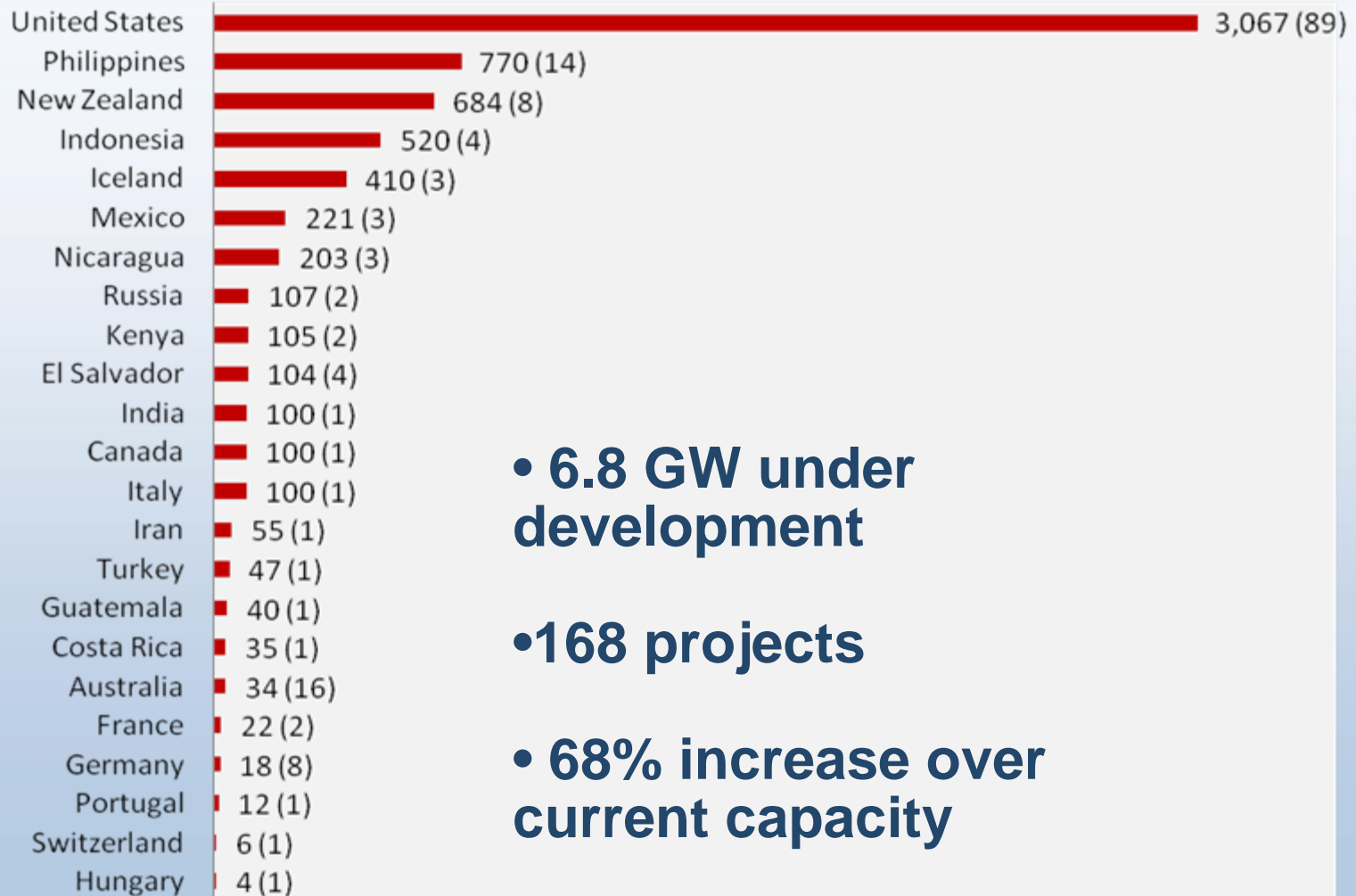


•US leads w/ 29% of all installed capacity

• Philippines (20%) plans to be world leader by 2025

Source: New Energy Finance, 2008

global developing capacity: MW (projects)



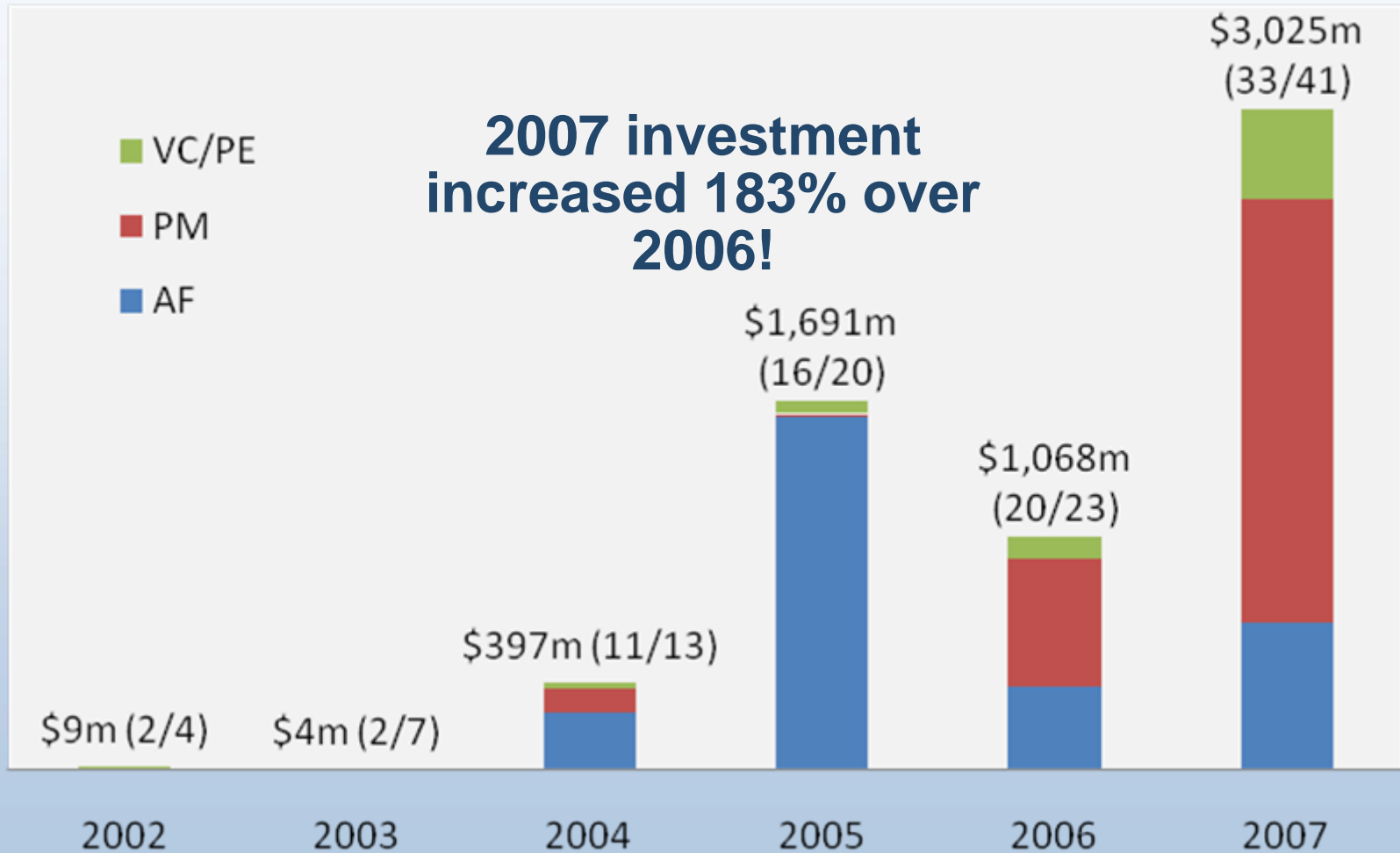
- 6.8 GW under development

- 168 projects

- 68% increase over current capacity

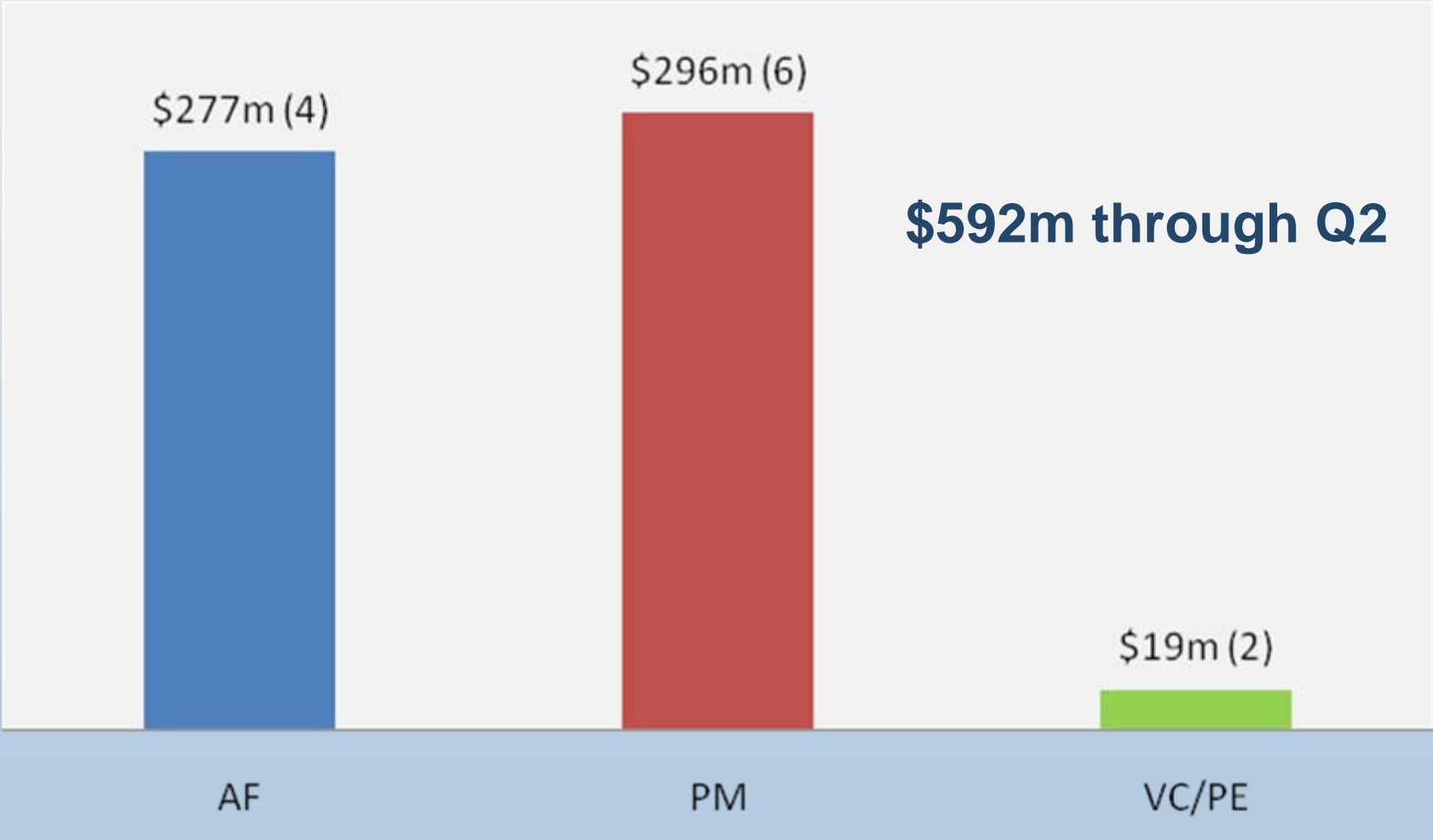
Source: New Energy Finance, 2008

Global investment in geothermal 2002-2007: \$ (disclosed deals/total deals)



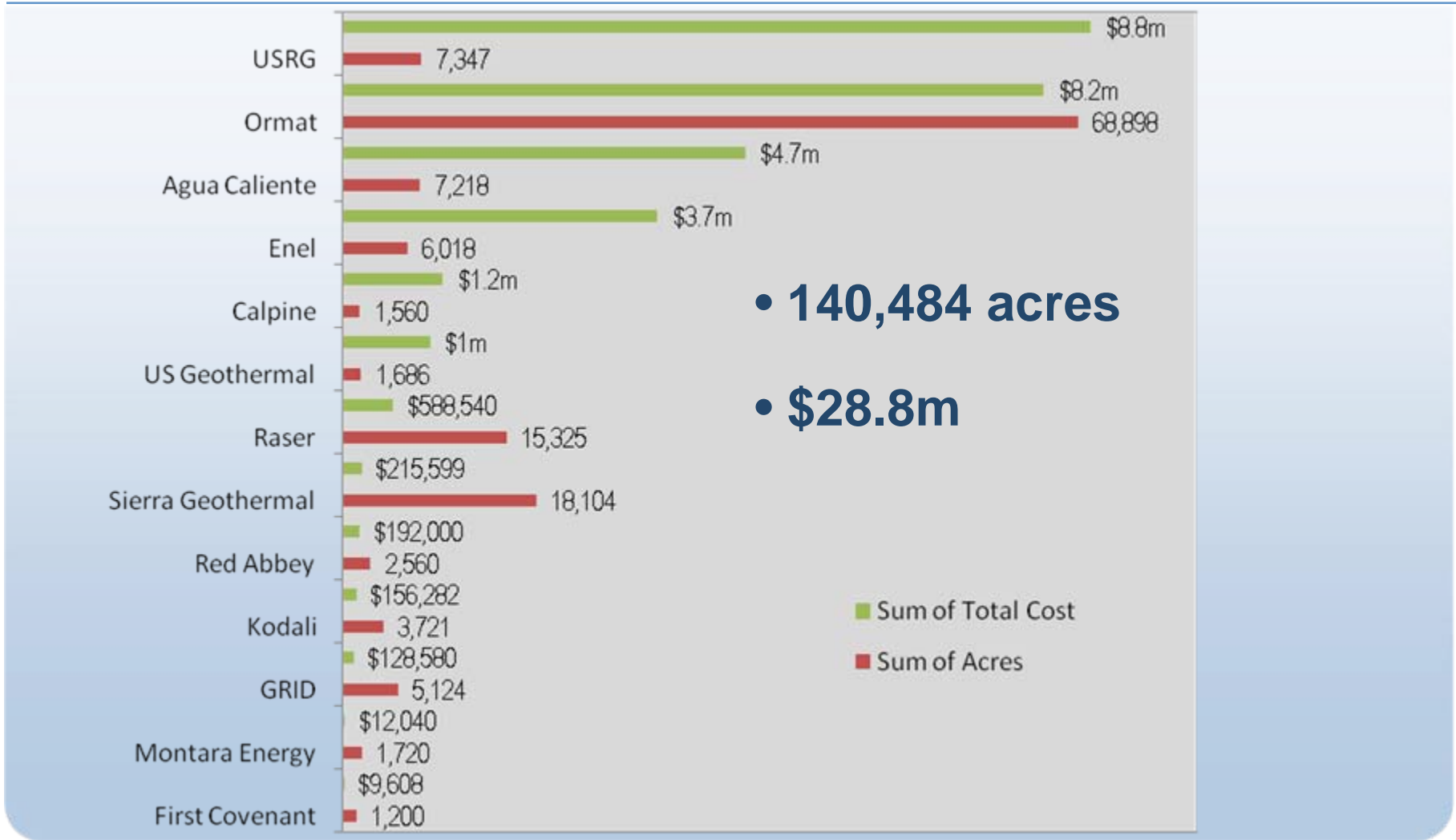
Source: New Energy Finance, 2008

so far in 2008: \$m (disclosed deals)



Source: New Energy Finance, 2008

more encouraging signs...US BLM 2007 Lease Sales



Source: New Energy Finance, 2008

conclusions

the global geothermal industry is expanding – 10 GW online with 6.8 GW under development

global investment is increasing -- \$592m so far in 2008

plenty of room for market expansion – both in conventional and non-conventional hydrothermal

Source: New Energy Finance, 2008

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