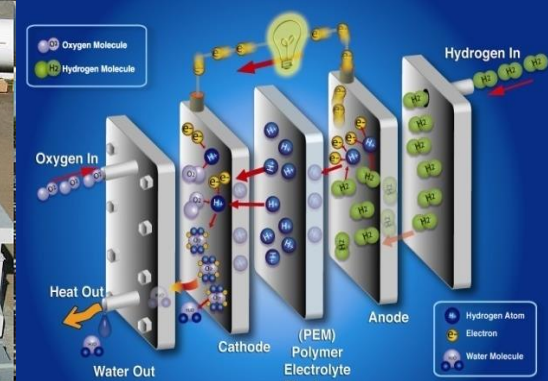
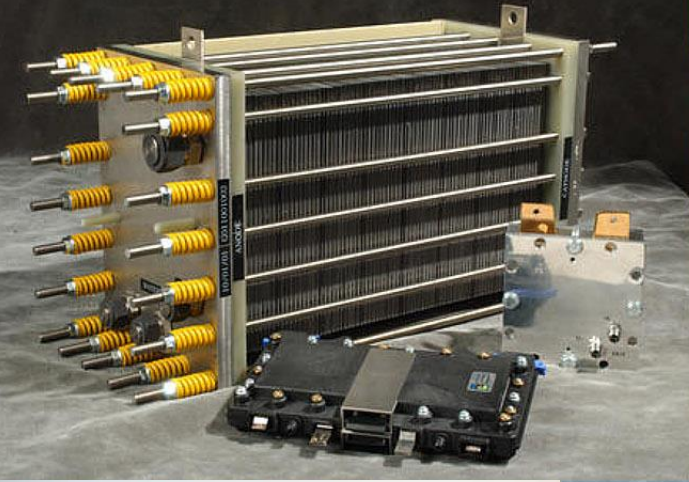


U.S. Department of Energy Hydrogen & Fuel Cells Program

U.S. DEPARTMENT OF
ENERGY

Energy Efficiency &
Renewable Energy



Annual Merit Review and Peer Evaluation Meeting

June 2014

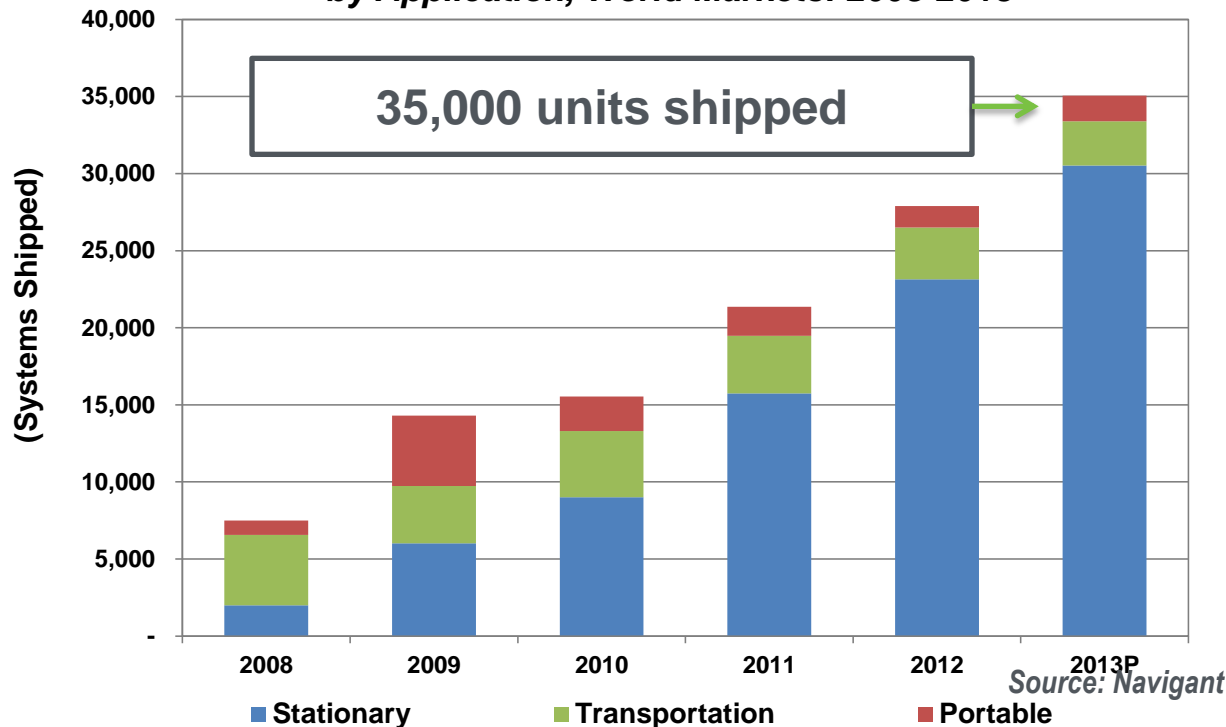
Dr. Sunita Satyapal

Director

Fuel Cell Technologies Office

U.S. Department of Energy

**Fuel Cell Systems Shipped
by Application, World Markets: 2008-2013**



Market Growth

Fuel cell markets continue to grow

- >25% increase in global MWs shipped since 2012
- 35% increase in revenues from fuel cell systems shipped over last year
- Consistent ~30% annual growth in global systems shipped since 2010.

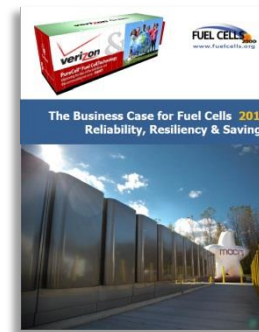
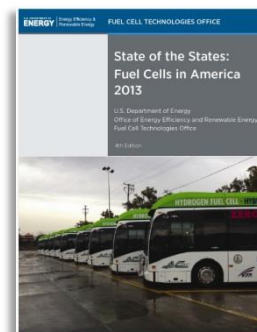
DOE Funded Reports

The Business Case for Fuel Cells 2013: Reliability, Resiliency & Savings

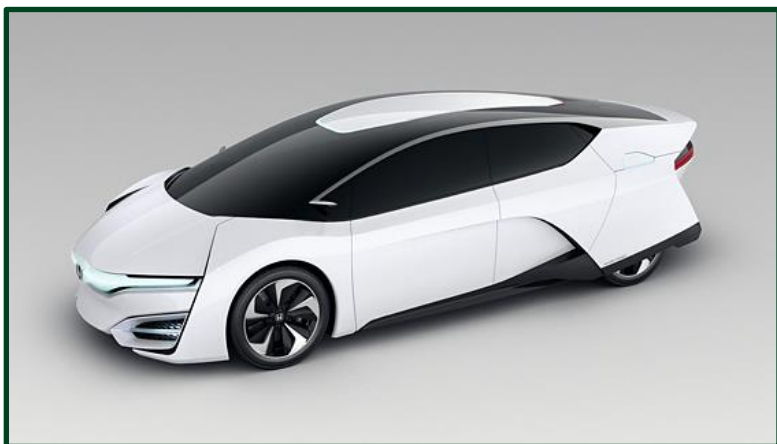
State of the States 2013: Fuel Cells in America

2012 Fuel Cell Technologies Office Market Report

<http://energy.gov/eere/fuelcells/market-analysis-reports>



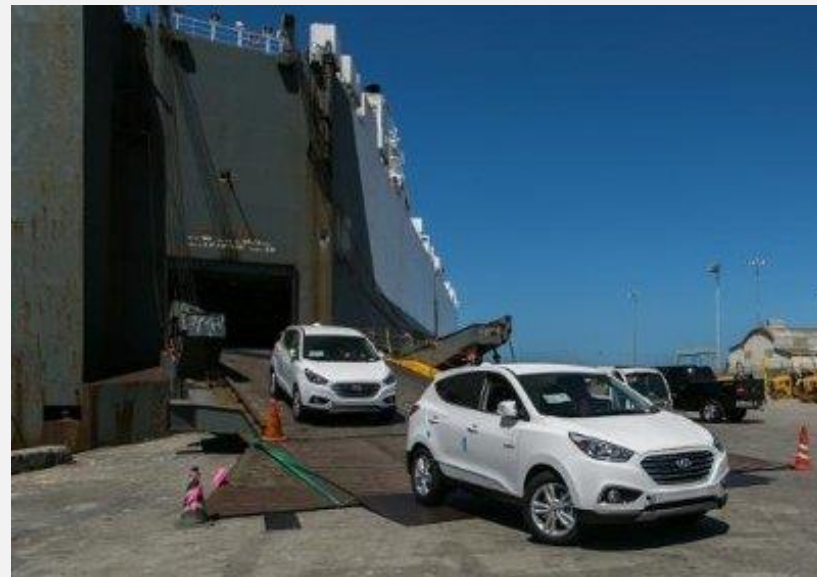
FCEVs on display at North American auto shows.



Honda Fuel Cell Electric Vehicle



Toyota Fuel Cell Electric Vehicle



**Hyundai's first mass-produced
Tucson Fuel Cell SUVs arrive in
Southern California
May 20, 2014**

Lease includes **free H₂ and
maintenance.**

H₂ USA

Mission: To promote the commercial introduction and widespread adoption of FCEVs across America through creation of a public-private partnership to overcome the hurdle of establishing hydrogen infrastructure.

Current partners include (additional in process):



NREL and SNL Provide:

- Technical expertise – Hydrogen specific materials and systems
- Facilities - for technical collaboration and validation
- Objectivity – Independent and objective assessment



Hydrogen Fueling Infrastructure Research and Station Technology

in support of

H₂ USA

Leverage DOE National Lab Network



Project Teams:

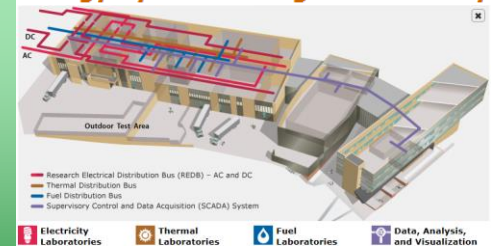
- Station Qualification
- Dispenser Components Research
- Fuel Quality Sensor
- Station Component RD&D
- Reference Station Design

Sandia National Laboratories



NREL
NATIONAL RENEWABLE ENERGY LABORATORY

Energy Systems Integration Facility



Distributed Energy Resources Test Facility



R&D

Demonstration & Deployment

Enabling Commercialization



Precompetitive R&D

- USCAR, energy companies, EPRI, utilities



- Implementing Agreements
 - Advanced Fuel Cells
 - Hydrogen



- Auto OEMs, energy companies, government, fuel cell companies

Other State Partnerships

Government, business, academia

- South Carolina (SCHFCA)
- CT, MA (e.g., CCAT, H2-Fuel Cell Coalition)
- Hawaii (Hawaii Hydrogen Initiative, H2I)



National lab led activities with industry (SNL & NREL led project)



Government partnership

Coordination on policy, lessons learned, accelerating commercialization

- 17 countries & the European Commission



Public-private partnership

~30 partners including global OEMs, H₂ providers, etc.

EERE Funding (\$ in thousands)		
Key Activity	FY 2014 Enacted	FY 2015 Request
Fuel Cell R&D	33,383	33,000
Hydrogen Fuel R&D ¹	36,545	36,283
Manufacturing R&D	3,000	3,000
Systems Analysis	3,000	3,000
Technology Validation	6,000	6,000
Safety, Codes and Standards	7,000	7,000
Market Transformation	3,000	3,000
NREL Site-wide Facilities Support	1,000	1,700
Total	\$92,928	\$92,983

¹Hydrogen Fuel R&D includes Hydrogen Production & Delivery R&D and Hydrogen Storage R&D

²Hydrogen and Fuel Cell related funding finalized end of FY14

FY 2014	
Basic Science ²	~\$25M
Fossil Energy, SECA	~\$25M
ARPA-E (planned)	~\$30M

FY14 DOE Total: >\$170M

FCTO Incubator FOA, \$4.6M
Concept papers due 7/7/14

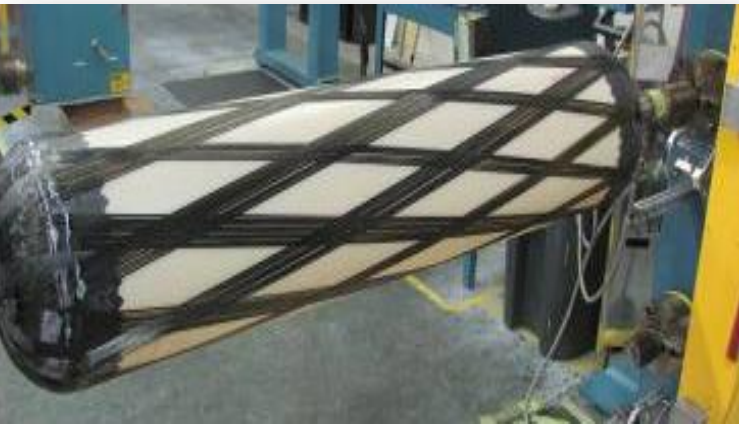
Key Targets

Fuel Cells: Automotive: \$40/kW, 5000 hours by 2020, ultimate \$30/kW

Stationary: \$1,000/kW (natural gas), \$1,500/kW (biogas), 80,000 hrs

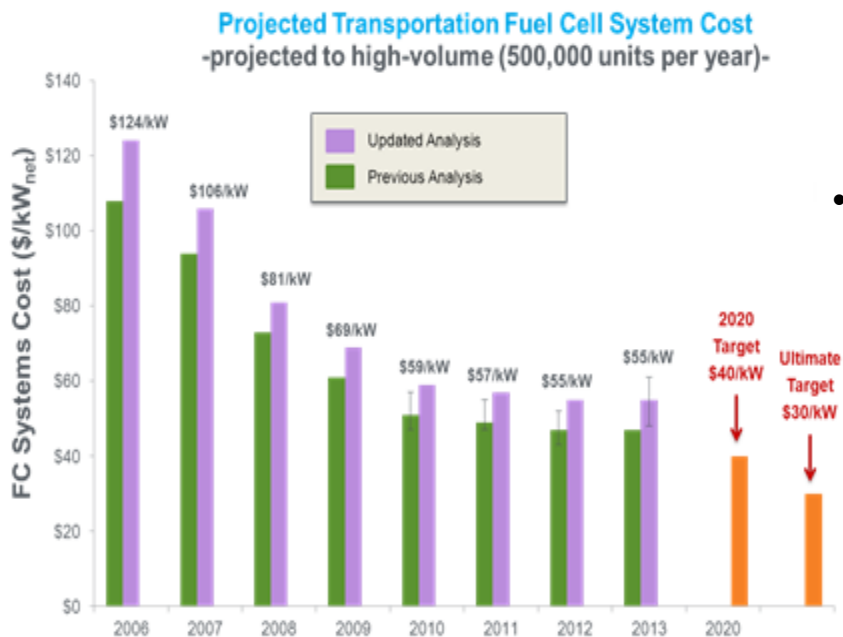
Hydrogen cost: <\$4/gge by 2020

Major Technical Areas



Accomplishments

- Revised automotive fuel cell cost analysis with updated system and Pt price. **>30% cost reduction since 2008.**
- Achieved >2x increase in fuel cell catalyst specific power from 2.8 kW/g_{PGM} (2008) to 6.0 kW/g_{PGM}. (3M)
- Developed new nanoframe catalysts with mass activity >30X vs Pt/C in RDE testing. (ANL, LBNL)



Future Directions

- Reduce cost and enhance performance and durability of fuel cell stack components to meet 2020 targets
 - Catalysts, membranes, and MEAs
- Consortium approach to address non-PGM catalysts, interfaces, MEAs
 - Modeling & combinatorial approaches (aligned w/ Materials Genome Initiative)

Presolicitation Workshop
6/16 @ 6PM

Status

- Cost: ~\$55/kW (500K/yr);
~\$280/kW (20K/yr)
- Durability: 3,600 hours (lab data)
- Catalyst specific power: 6.0 kW/g_{PGM}

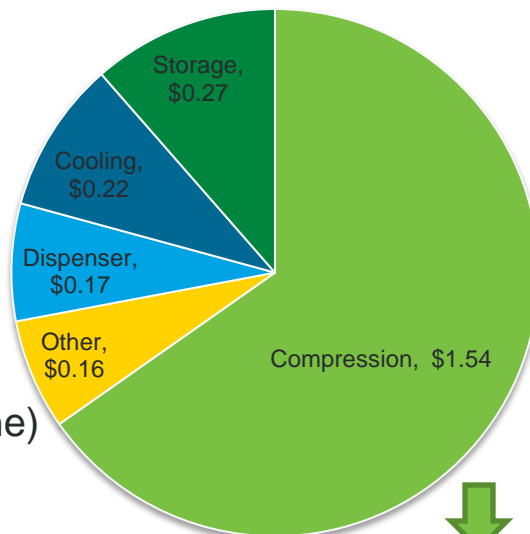
FY 2015 Goal

- Improve fuel cell catalyst specific power to 6.6 kW/g_{PGM}, on track to achieve: 8 kW/g_{PGM}, \$40/kW and 5,000 hr durability by 2020

Accomplishments

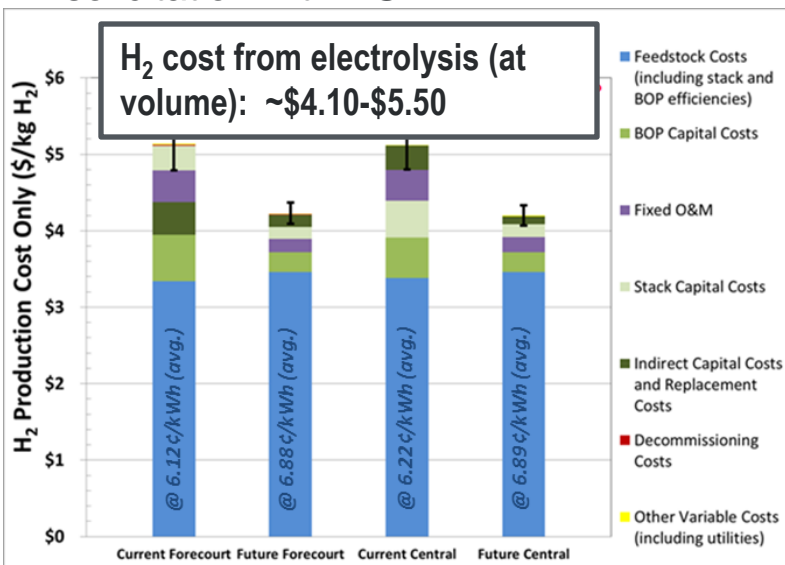
- $\geq 10X$ reduction in electrolyzer PGM loading.
- Enhanced stability of III-V PEC devices (1.7X improvement in photocurrent density).
- Developed innovative refueling concept to reduce station cost 50% (compared to 2013 baseline)
- Four Workshops and a joint solicitation with NSF.

CSD can add up to \$3 to H₂ cost



Future Directions

- RD&D on:
 - New components for 700 bar fueling
 - Low-carbon, near-term hydrogen production, and integrated solar water splitting systems
- Continued Analysis of Production & Delivery Pathways
 - Fermentative H₂ Production
 - High Temperature Electrolysis
 - Cost of Early Market P&D
 - Release new 2014 version of HDSAM
- 10 new awards in P&D! (see backup)



Compression is 65% of the cost of H₂

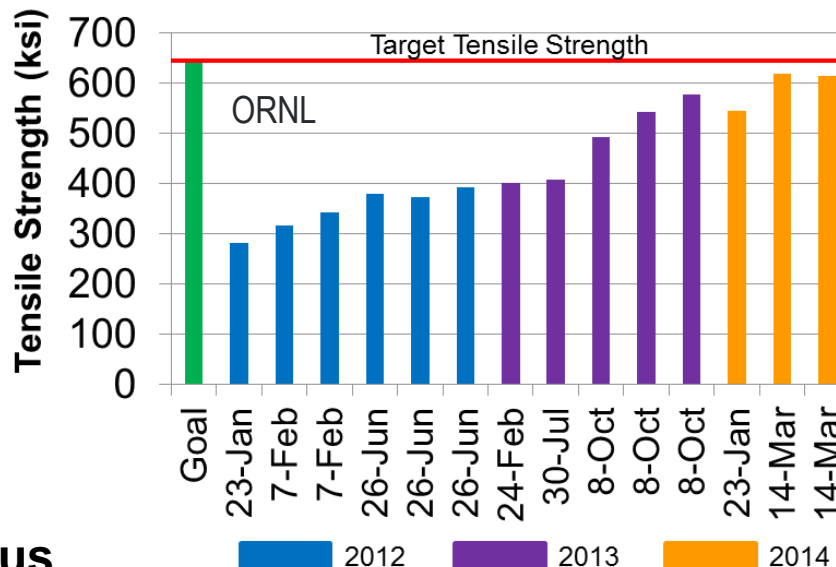
FY 2015 Goals

- Reduce the cost of H₂ from renewables to \$6.80/gge from \$8.00/gge (2011, dispensed, untaxed)
- Demonstrate PEC with >15% efficiency vs. 2011 baseline of 12%

Accomplishments

- 6 new awards and \$7M announced for advanced storage systems. Materia, PPG Industries, SNL, LLNL, Ardica, HRL
- Developed textile PAN fibers at ~25% lower cost than conventional PAN precursor. (ORNL)
- Two sorbent system prototypes in Phase 3 with the Engineering Center to demonstrate performance against targets (see below).

Yield Strength Progression



Status

■ 2012 ■ 2013 ■ 2014

Future Directions

- Develop advanced hydrogen storage materials, guided by material property requirements established by Engineering Center.
- Develop storage technologies for early markets (e.g., forklifts).
- Validate low cost carbon fiber precursors.

Projected H₂ Storage System Performance Current Status

Gravimetric kWh/kg

Volumetric kWh/L

Costs* \$/kWh

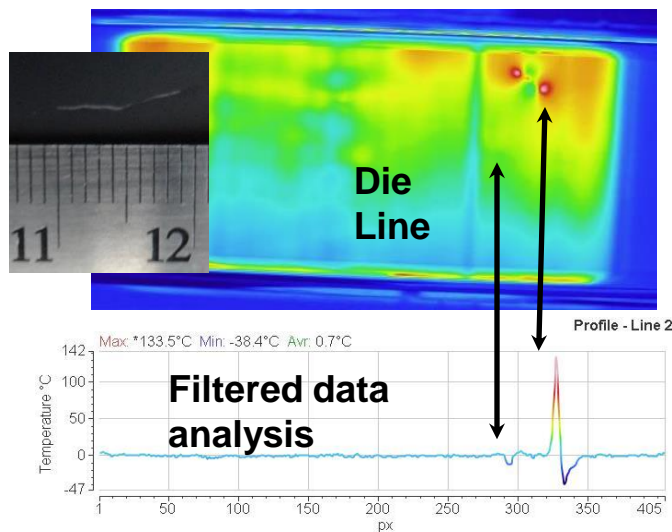
700 bar compressed (Type IV)	1.5	0.8	17
350 bar compressed (Type IV)	1.8	0.6	13
Sorbent (MOF-5, 100bar MATI, LN ₂)	1.1	0.7	16
Hexcell, flow-through cooling	1.2	0.6	13
2017 Target	1.8	1.3	12

FY 2015 Goals

- Complete sorbent system prototypes and validate Engineering system models
- Reduce the cost of 700-bar H₂ storage systems by 15% from 2013 baseline projection of \$17/kWh

Accomplishments

- Achieved 25% 3-layer MEA cost reduction (WL Gore)
- Achieved ~30% composite mass reduction & ~20% cost savings over 2013 baseline hydrogen storage tank (Quantum)
- Held EERE/CEMI Quality Control Workshop (Co-sponsored by FCTO, AMO, SETO, VTO, & BTO); identified gaps and opportunities (CEMI: Clean Energy Manufacturing Initiative)
 - Report Online:
<http://energy.gov/eere/fuelcells/eere-quality-control-workshop>



Future Directions

- Funding Opportunity Announcement released on 5/20/14 (up to \$2M DOE)
 - Topic 1: Supply chain outreach and development
 - Topic 2: Global manufacturing competitiveness analysis

Deadline: 6/30/2014

Status

- Inline membrane defect detection using IR/DC demonstrated (Ion Power/NREL), defects detected at 60 ft/min (NREL)
- GDL cost of \$1.37/kW (projected for high volume manufacturing 500K/yr (Ballard))

FY 2015 Goals

- Demonstrate 3X increase of continuous in-line measurement processes to achieve 100 ft/min for MEA/component roll-to-roll processing
- Conduct supply chain analysis

Accomplishments

- Fuel cell bus fuel economies up to 2X better than 2008 baseline. Best durability near 2016 target (18,000 hrs).
- Awarded FCEV data collection projects to 6 OEMs (~90 vehicles; up to 235,000 mi anticipated).
- 2 new projects on fuel cell hybrid electric medium-duty trucks.
- Designed and built fuel cell system for airport ground support vehicle
- Developed prototype design for fuel cell power system for pier-side and auxiliary sea vessel power (w/ MARAD)
- Demonstrated landfill gas to H₂



GM



Hyundai



Mercedes-Benz

NISSAN GROUP OF NORTH AMERICA



HONDA



ELECTRICORE
POWERING THE FUTURE

TOYOTA

Future Directions

- Validate hydrogen refueling station/components and wind to H₂/energy storage systems
- Accelerate H₂FIRST project
- Test light duty battery electric fuel cell hybrid range extender and develop fleet strategies
- RFI planned for fuel cell range extender



Status

- FCEVs achieved 59% efficiency (target 60%); 3.5 million miles driven
- Commercial power systems demonstrated durability between 40,000-80,000 hours
- 1,600 DOE-supported MHE & BUP fuel cells resulted in >11,500 units with no DOE funding

FY 2015 Goals

- Validate next generation FCEV and truck performance (e.g., parcel delivery vans with >100 mi range)
- Enable a 5X increase in the number of installed fuel cells vs. 2012 baseline
- Complete marine power and refrigerated truck APU demos

Accomplishments

- Global Technical Regulation adopted by UN Economic Commission for Europe Working Party 29 (US DOT NHTSA)
- Published report on SCS impact on station footprint (SNL)
- >900 downloads of Hydrogen Tools App covering 5 regions (PNNL)



Future Directions

- Quantify impact of liquid hydrogen release to reduce separation distances
- Develop hydrogen fueling station template (includes necessary safety codes & standards)
- Coordinate with State of California (e.g., CEC, CARB) to accelerate station deployment

Status

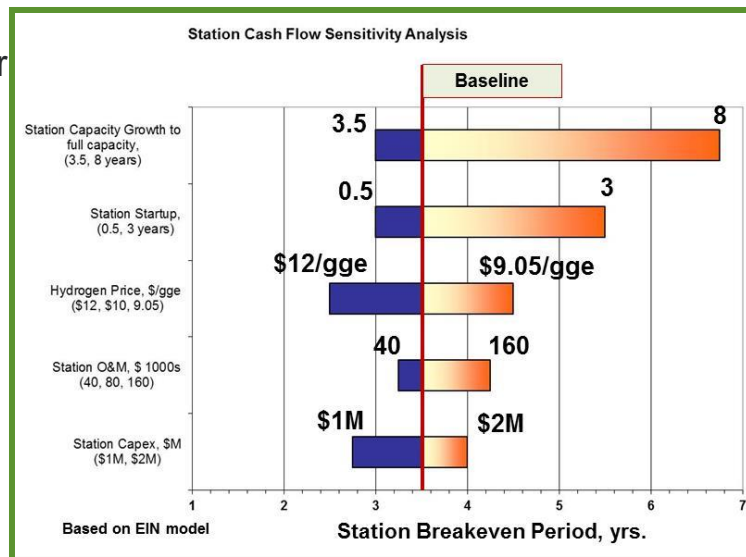
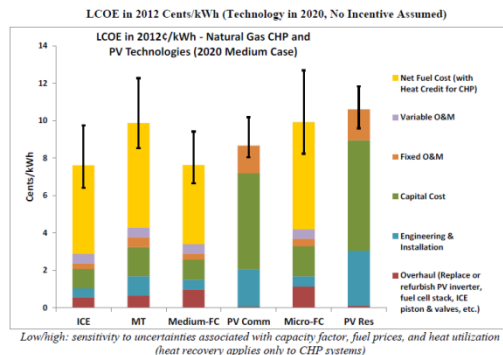
- Close to 30,000 code officials and first responders trained (NREL, PNNL)
- Assessed number of stations that can accept and deliver hydrogen (20% of 70 stations)
- H₂ Safety Panel reviewed 395 projects

FY 2015 Goals

- Initiate liquid hydrogen release studies
- Implement First Responder National Hydrogen Response Education Program
- Continued support of H₂USA and Market Support and Acceleration Working group

Accomplishments

- Analyzed future Pt requirements for ICEVs.
- Analyzed comparative LCOE for stationary PEM fuel cells.
 - 7 to 9¢/kWh competitive with solar PV and other CHP technologies.
- 8-13% potential cost improvement from improved fuel cell efficiency through R&D.
- Analyzed sensitivity of hydrogen infrastructure cost drivers.



Future Directions

- Develop interim hydrogen cost target.
- Continue life-cycle analysis of GHG, petroleum use and water for pathways.
- Assess gaps and drivers for early market infrastructure cost.
- Evaluate the use of hydrogen for energy storage.
- Issue RFI on hGallon. hGallon equates cost of hydrogen and gasoline.

Status

- Completed JOBS H₂ model; ~1300 jobs ('job-years') created/retained (ARRA)
- Completed fact sheets for analysis models

FY 2015 Goals

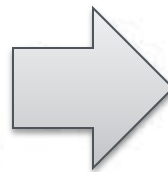
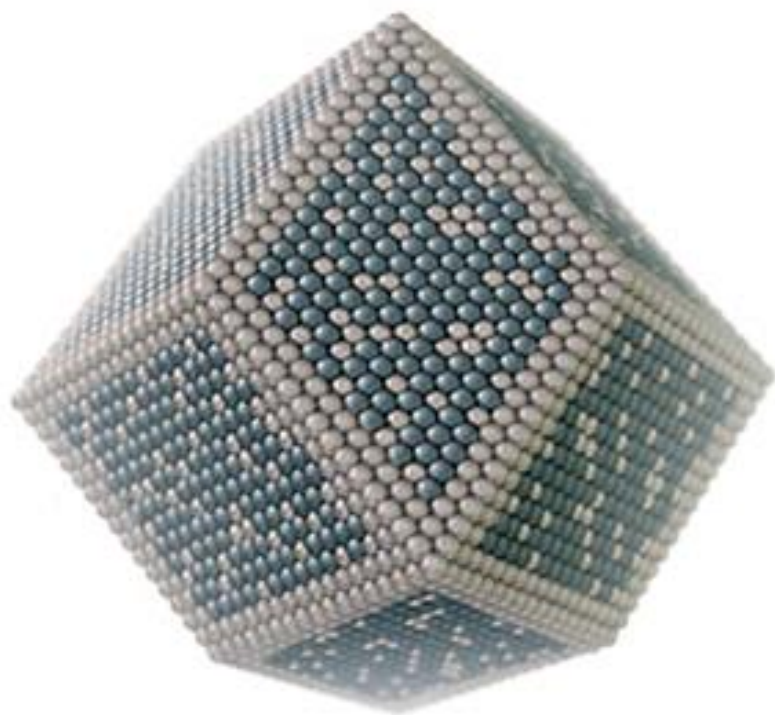
- Continue analyses to guide R&D
- Infrastructure cost and financing scenario analysis.

Highlights



New nanoframe catalysts developed with mass activity >30X higher than Pt/C catalysts in RDE testing (BES-EERE collaboration)

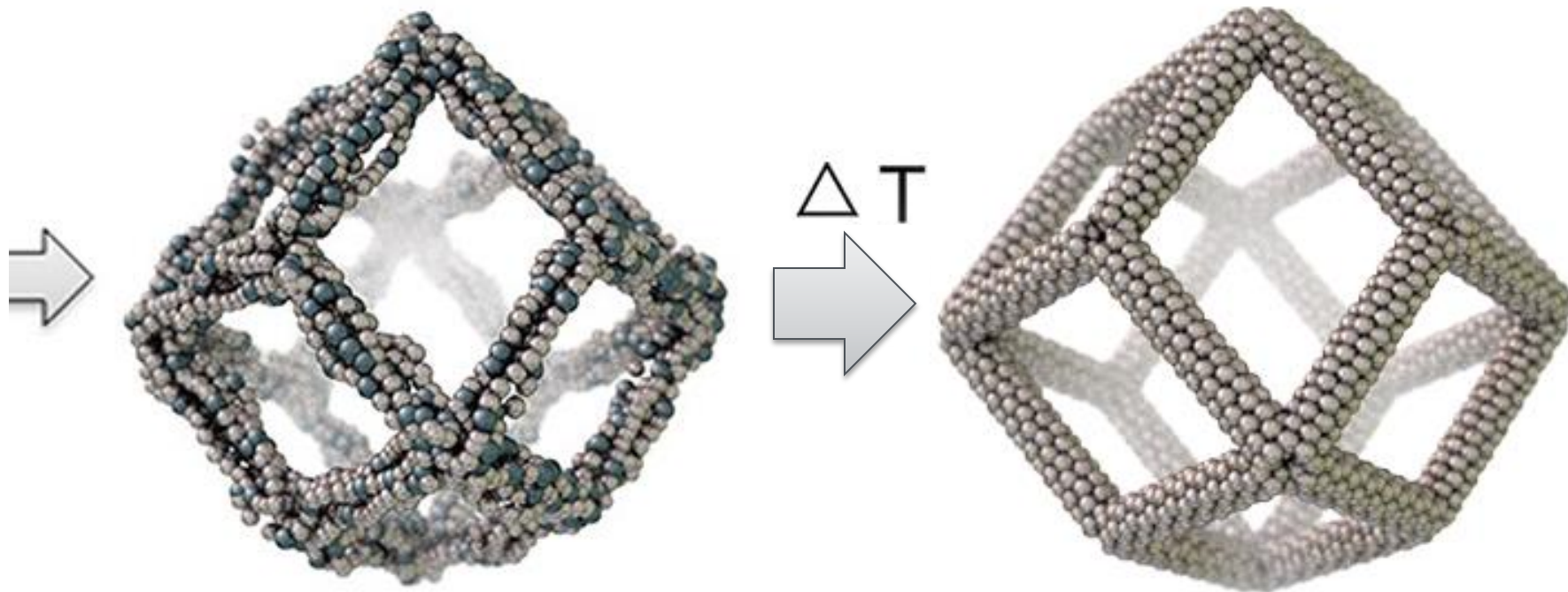
A PtNi₃ Polyhedra **B** PtNi Intermediates



New nanoframe catalysts developed with mass activity >30X higher than Pt/C catalysts in RDE testing (BES-EERE collaboration)

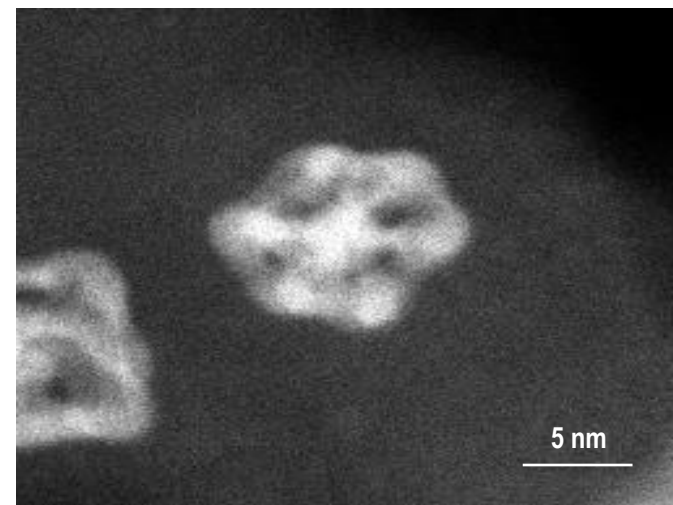
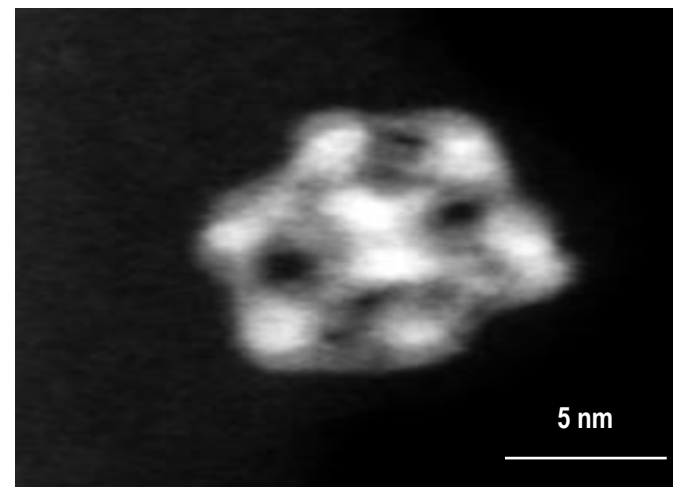
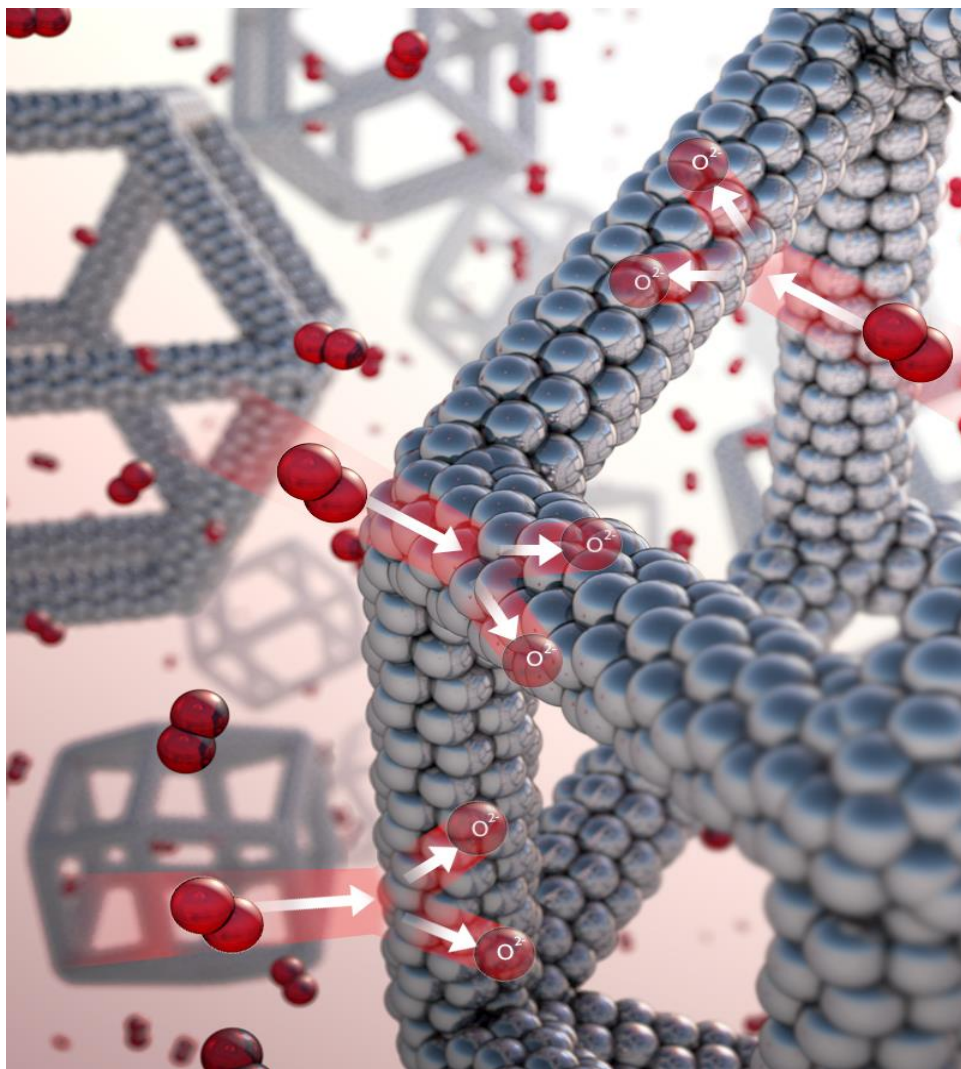
C Pt₃Ni Nanoframes

D Pt₃Ni nanoframes/C with Pt-skin surfaces



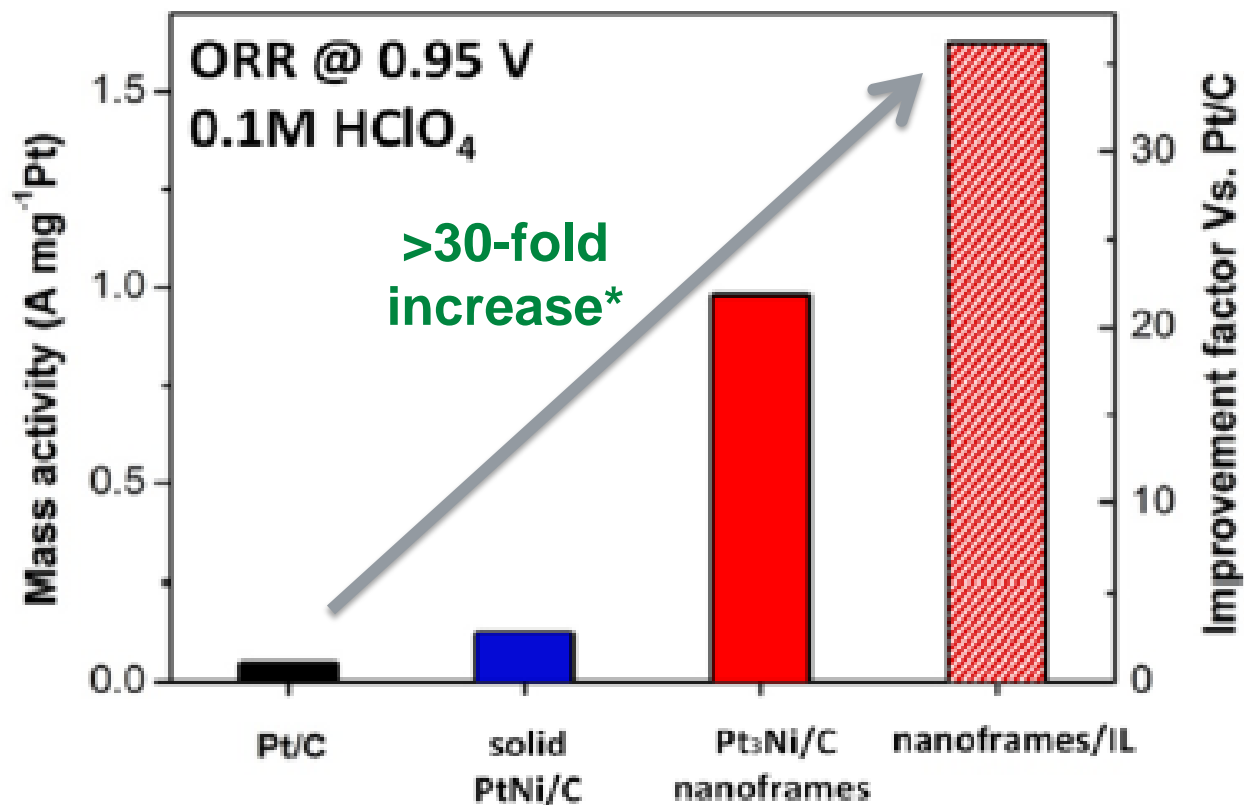
Dispersible cathode catalyst with extended thin film catalyst properties

New nanoframe catalysts developed with mass activity >30X higher than Pt/C catalysts in RDE testing (BES-EERE collaboration)



TEM- Karen Morre, ORNL

New nanoframe catalysts developed with mass activity >30X higher than Pt/C catalysts in RDE testing (BES-EERE collaboration)



*Catalyst only,
Future plans:
Demonstrate
MEAs

“Highly Crystalline Multimetallic Nanoframes with Three-Dimensional Electrocatalytic Surfaces”

Vojislav Stamenkovic (ANL) & Peidong Yang (LBNL/UCB)

Science, 343 (2014) 1339

- 10 public stations operating in CA
- 46 stations in development
 - \$46.6 million announced for 28 new H₂ refueling stations
 - 13 in Northern CA
 - 15 in Southern CA

Station	Type	Source	Capacity
Burbank	Gaseous	SMR	108 kg/day
Emmeryville/ AC transit	Gaseous & Liquid	Electrolyzer & Liquid truck	60 kg/day
Fountain Valley	Gaseous	SOFC – biogas conversion	100 kg/day
Harbor City	Gaseous	Tube trailer	100 kg/day
UC Irvine	Liquid	Liquid truck	25 kg/day
New Port Beach	Gaseous	SMR	108 kg/day
Thousand Palms	Gaseous	SMR	~200 kg/day
Torrance	Gaseous	Pipeline	50 kg/day
West LA	Gaseous	Electrolyzer	32 kg/day
CSU-LA	Gaseous	Electrolyzer	60 kg/day



Northeast
Region



Developed infrastructure model for station rollout strategies.

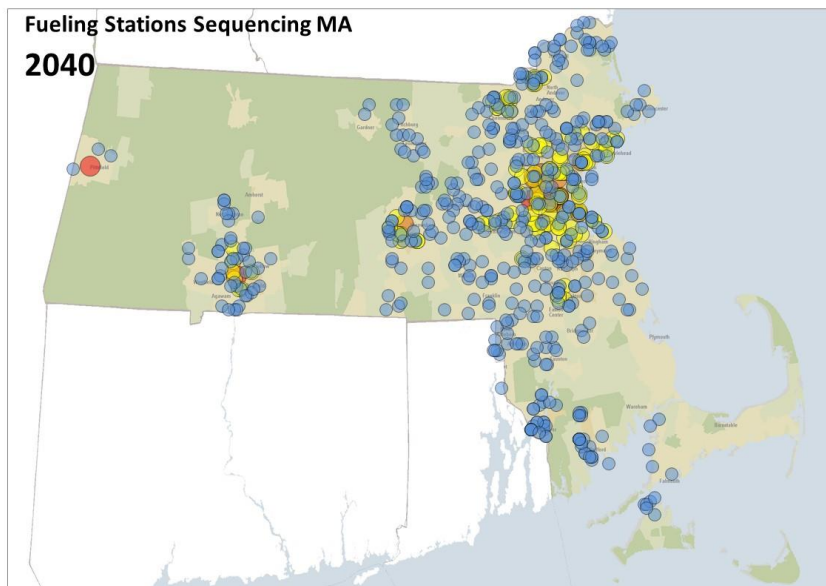
Factors considered include:

- Resource availability
- Cost
- Financial analysis
- Policy and incentive analysis.

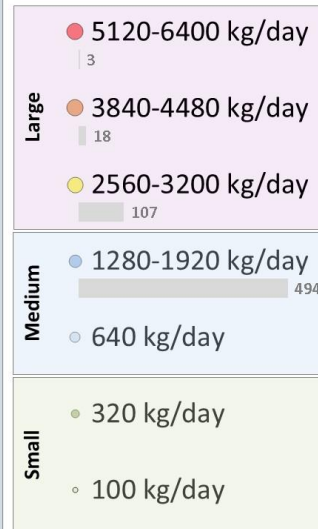
State



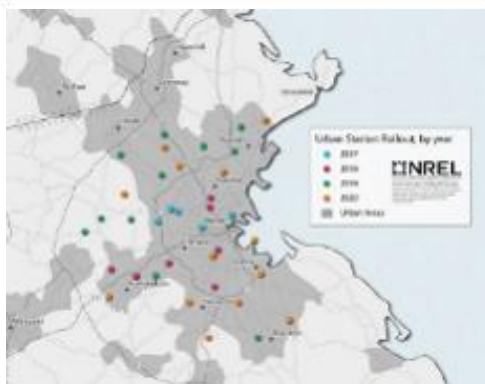
Fueling Stations Sequencing MA
2040



Station Sizes & Abundance



Greater
Boston



Source: M. Penev, NREL

Maps shown are draft and intended for discussion locating fleets and siting hydrogen locations.

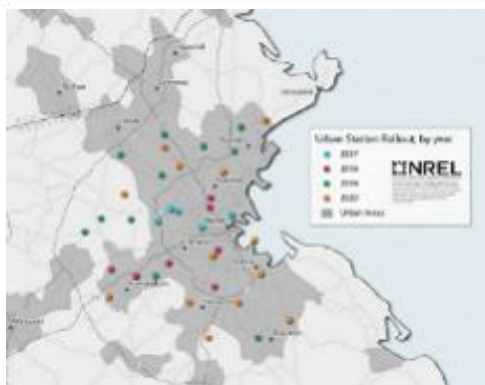
Northeast
Region



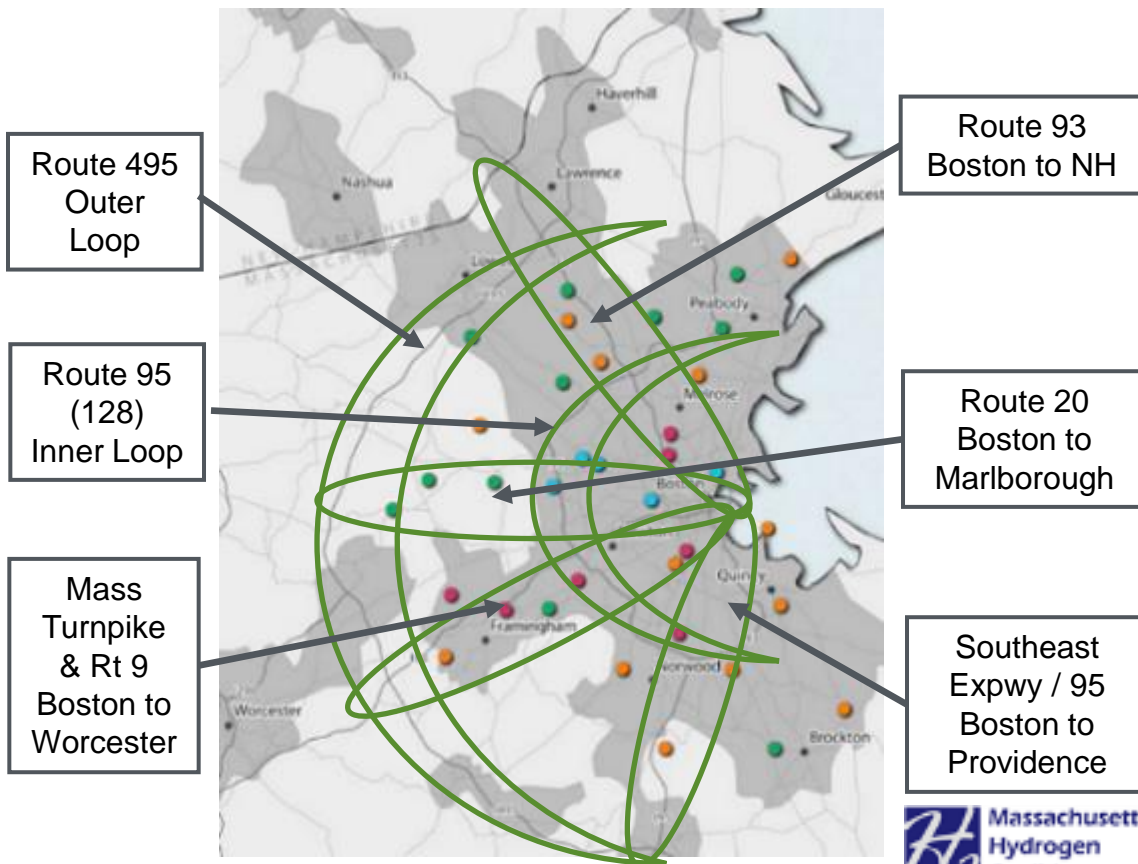
State



Greater
Boston



Greater Boston Corridors



Source: Charlie Meyers

Maps shown are draft and intended for discussion locating fleets and siting hydrogen locations.

CENTRALIZED LOCATION

organizes current H₂ resources in one robust location—including **more than 20** existing tools, with plans for adding future content

FOCUSED CONTENT

tailored to the specialized needs of H₂ user groups

CUSTOMIZABLE INTERFACE

allows content to display based on the H₂ user's role or interests

RESPONSIVE DESIGN

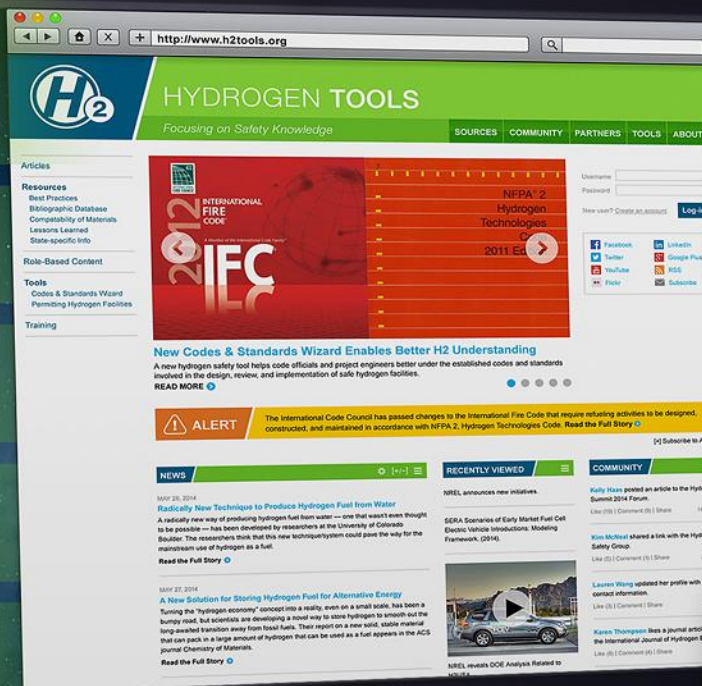
enables H₂ safety work across both desktop and mobile devices

TRUSTED COMMUNITIES

fostered through social networking around H₂ subject matter expertise

EXPANDABLE FORMAT

built with frequently requested future feature sets in mind



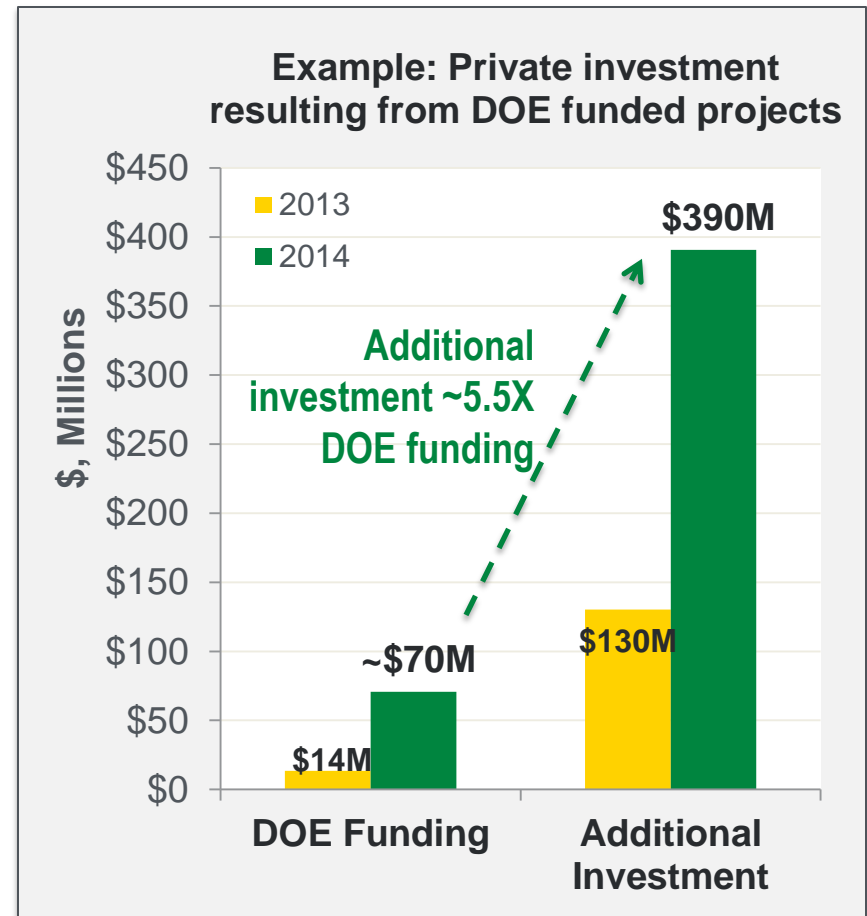
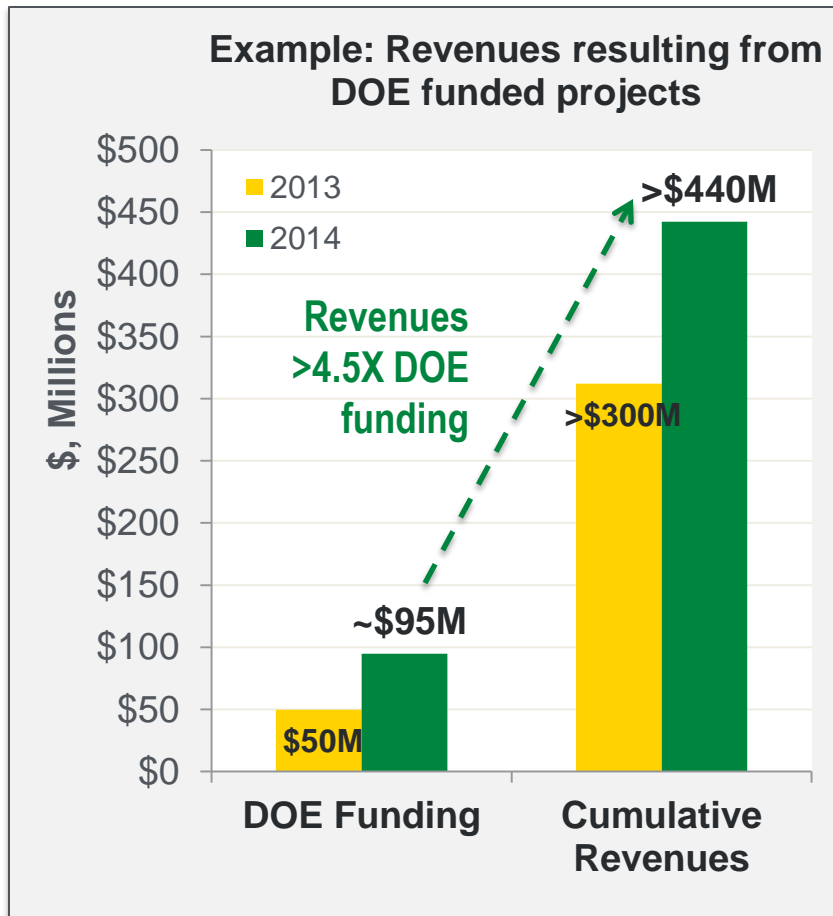
+ Mobile Friendly



“Tech to Market” Assessing the Impact of DOE FCTO Funding

For selected projects tracked, DOE EERE funding has led to:

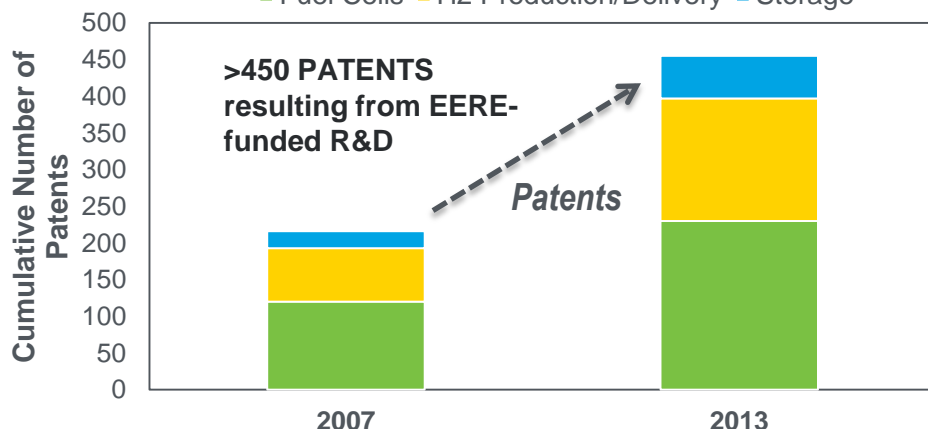
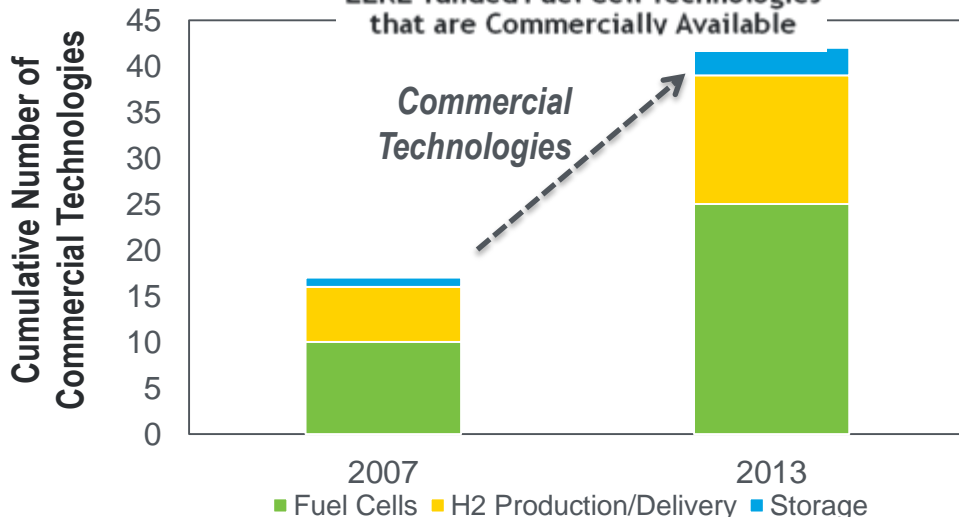
- **Revenues valued at >4.5 times the DOE investment**
- **Additional private investment valued at ~5.5 times the DOE investment**



DOE FCTO funding has led to >450 patents, 42 commercial hydrogen and fuel cell technologies and 65 emerging technologies.

Accelerating Commercialization

EERE-funded Fuel Cell Technologies that are Commercially Available

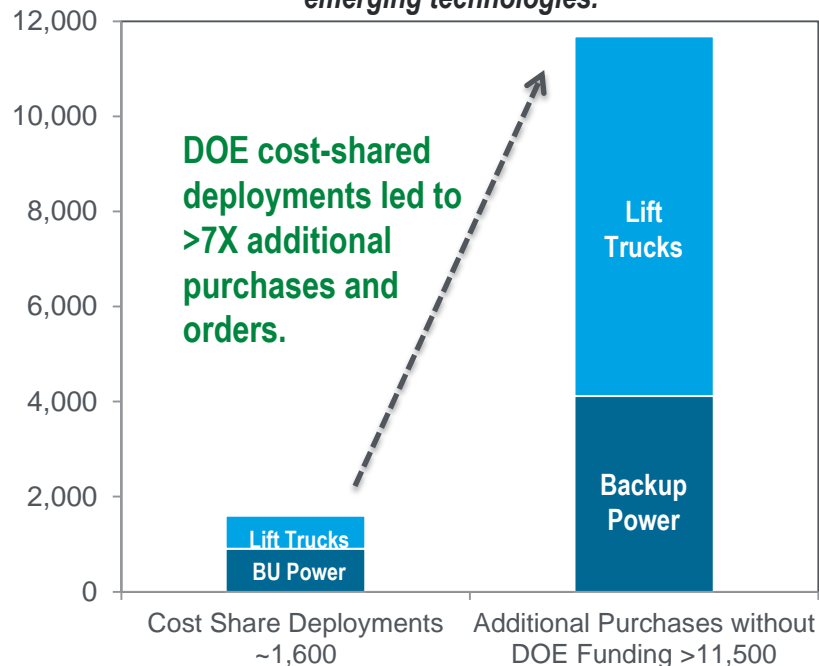


Source: Pacific Northwest National Laboratory

http://www1.eere.energy.gov/hydrogenandfuelcells/pdfs/pathways_2013.pdf

Leveraging DOE Funds:

Government as "catalyst" for market success of emerging technologies.



Over \$37M saved in the last 5 years through active project management

Exciting new opportunities for fuel cells in early market applications – airport ground support equipment and medium-duty trucks

Hybrid Medium-Duty Trucks

Delivery & refrigerated trucks and waste transport vehicles



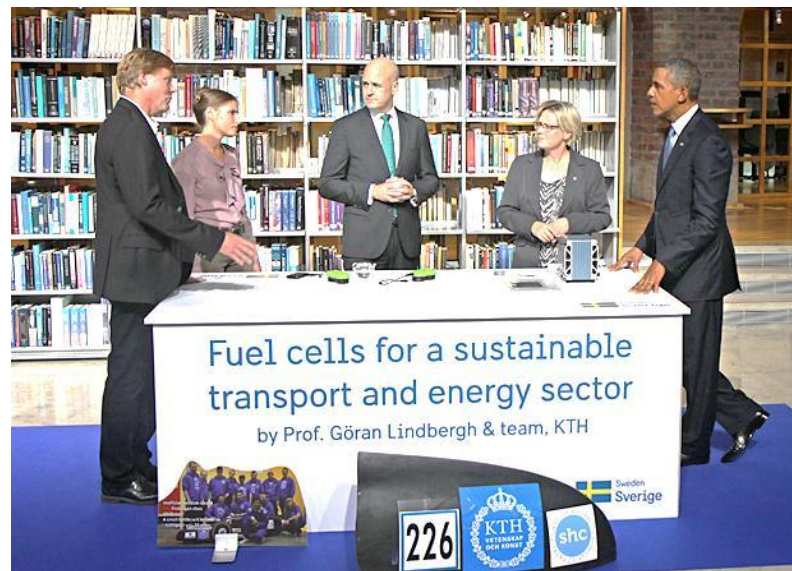
4 new DOE projects and 2 SBIRs
Projects in CA, TN, GA

Ground Support Equipment

Seaports & Airports



“Investor Day” events- East & West Coasts
November, 2013 at NY Times Building in NYC
April, 2014 at Stanford University



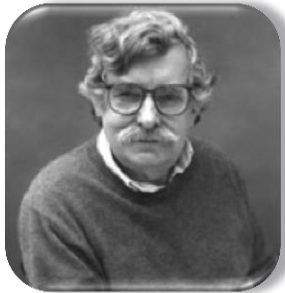
President Obama at Fuel Cell Exhibit in Sweden



Secretary Moniz at DC Autoshow

>80 news articles (blogs, etc) published in the last year

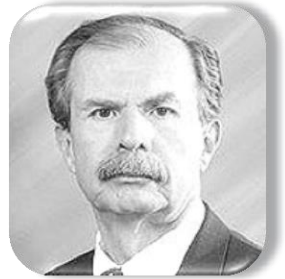
Webinars, google+hangout & workshops disseminate information



Peter Hoffman

Editor, Hydrogen and Fuel Cell Letters & Journalist

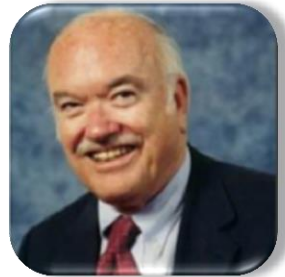
- Author of **The Forever Fuel—The Story of Hydrogen and Tomorrow's Energy: Hydrogen, Fuel Cells, and the Prospects for a Cleaner Planet**
- Longtime supporter and hydrogen and fuel cell advocate



Dale Gardner, National Renewable Energy Laboratory

Associate Lab Director of the Renewable Fuels and Vehicle Systems Directorate

- Astronaut on space shuttle
- Longtime contributor and leader in hydrogen, biofuels and vehicle technologies



Jim McGrath, Virginia Tech University

University Distinguished and Ethyl Corporation Professor of Chemistry

- Synthesis and characterization of new directly copolymerized sulfonated aromatic copolymers for proton exchange membranes



Sheldon Shore, Ohio State University

Emeritus Professor

- Long time (~60 years) researcher of boron compounds
- First researcher to synthesize ammonia borane.



Adam Weber (LBNL) received a 2013 Presidential Early Career Award for Scientists & Engineers (PECASE). PECASE is the most prestigious U.S. award for young scientists and engineers.

The only EERE PECASE awardees ever were from FCTO!

Maria Ghirardi (NREL)

- NREL's Research Fellows Council

James Miller and Riccardo Scarcelli (ANL)

- SAE McFarland Award

Sanjeev Mukerjee (Northeastern University) and Piotr Zelenay (LANL)

- Electrochemical Society Fellows



Kathy Ayers (Proton OnSite)

- American Chemical Society Women Chemist Committee's Rising Star Award

Jeff Long (LBNL, Univ. of CA – Berkeley)

- American Chemical Society Inorganic Chemistry Lectureship Award

Thank You

Sunita Satyapal

Director

Fuel Cell Technologies Office

Sunita.Satyapal@ee.doe.gov

hydrogenandfuelcells.energy.gov

Novel approaches to hybrid reforming, bio-derived liquids and solar water splitting

6 selections, \$13.3 M in federal funds

FuelCell Energy Inc.

(\$900k), Danbury, CT

- Novel reformer-electrolyzer-purifier (REP) system

Pacific Northwest National Laboratory

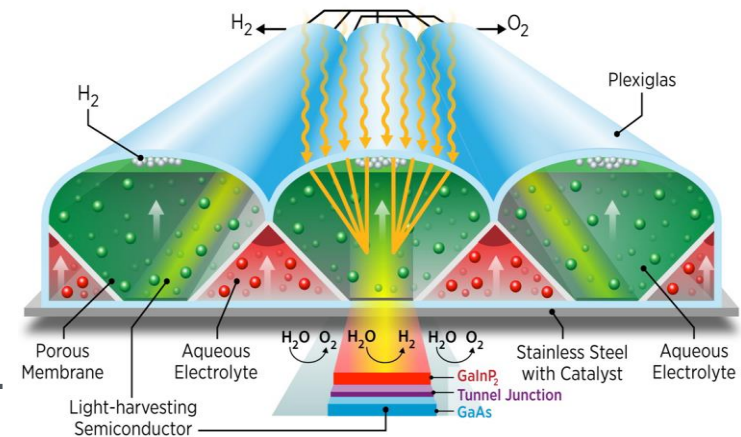
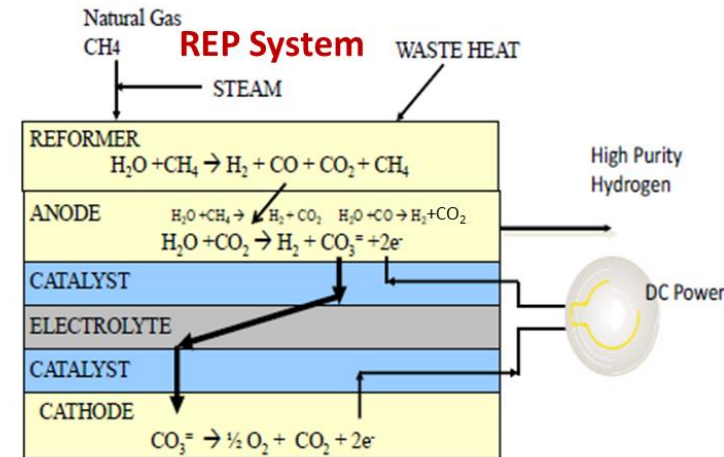
(\$2.2M), Richland, WA

- Scalable, compact piston-type reactor for H₂ production from bio-derived liquids.

National Renewable Energy Laboratory

(\$3M), Golden, CO

- High-efficiency tandem absorbers based on novel semiconductor materials
- Economical solar hydrogen production from water.



Novel approaches to hybrid reforming, bio-derived liquids and solar water splitting

6 selections, \$13.3 M in federal funds

University of Hawaii (\$3M), Honolulu, HI

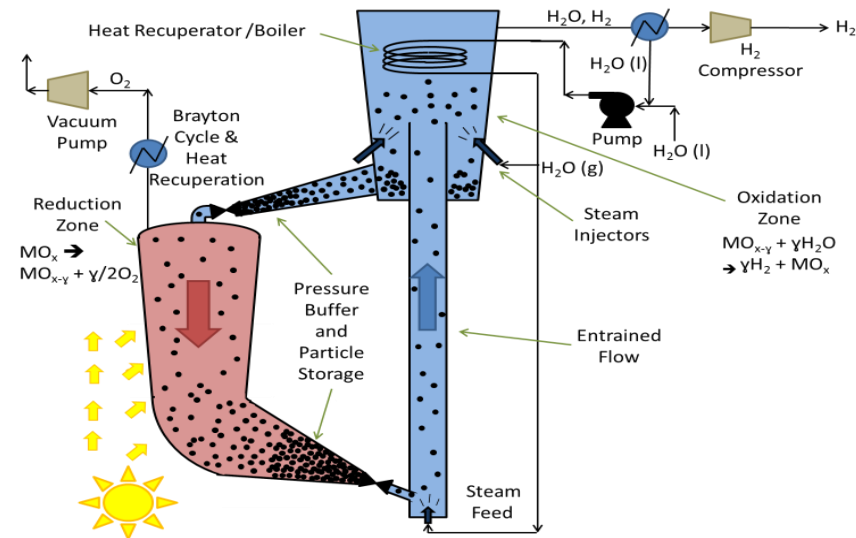
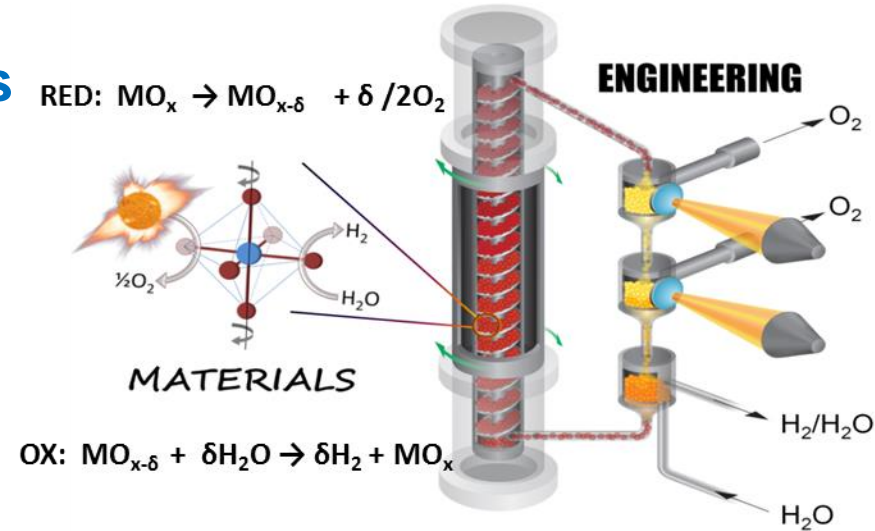
- Photoelectrodes based on novel wide-bandgap thin-films for direct solar water splitting.

Sandia National Laboratories (\$2.2M) Livermore, CA

- Innovative high-efficiency solar thermochemical reactor for H₂ production.

University of Colorado, Boulder (\$2M), Boulder, CO

- Novel flowing particle bed solar-thermal reactor to split water with concentrated sunlight.



Innovative technologies for forecourt compression, storage and dispensing

4 selections, \$7.3 M in federal funds

Southwest Research Institute (\$1.8M), San Antonio, TX

- Linear motor reciprocating compressor for forecourt H₂ compression

Oak Ridge National Laboratory (\$2.0M), Oak Ridge, TN

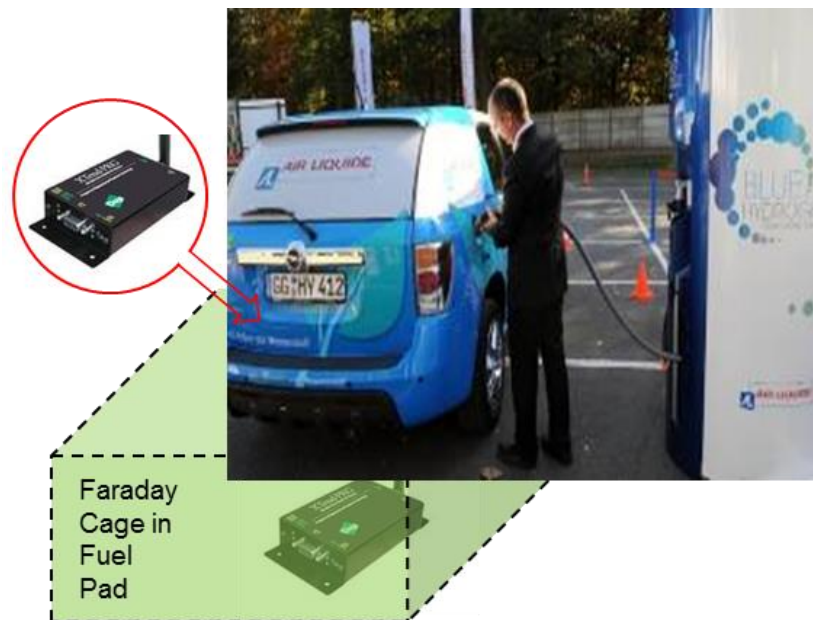
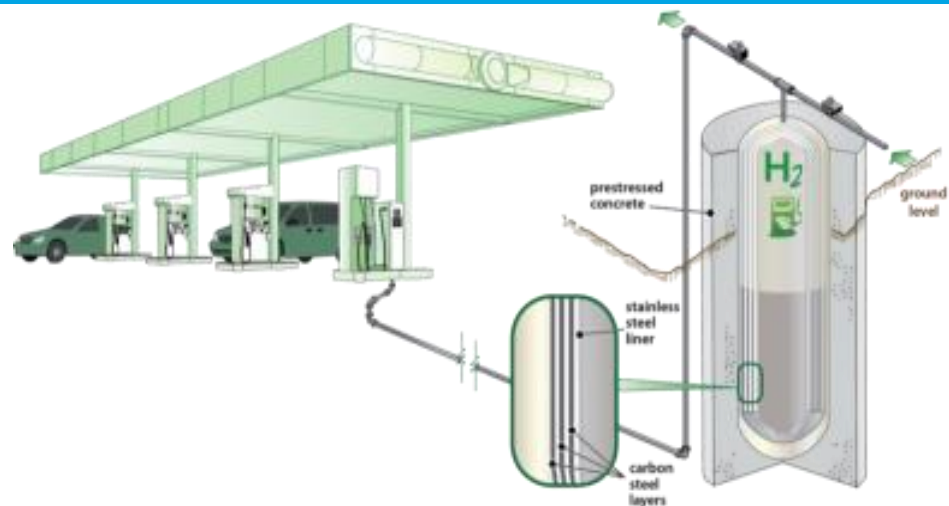
- Low cost steel concrete composite vessel for high pressure forecourt H₂ storage.

Wiretough Cylinders LLC (\$2.0M), of Bristol, VA

- Low cost 875 bar H₂ storage vessel using a steel wire overwrap.

Nuvera Fuel Cells Inc. (\$1.5M), Billerica, MA

- Integrated, intelligent 700 bar H₂ dispenser for fuel cell electric vehicle fueling



Concept:

Hydrogen Cost → Hydrogen gasoline gallon equivalent cost → hGallon Cost
 \$8/kg → \$8/gge¹ → \$3.8/gallon

Filling up your tank costs the same if H₂ is \$8/kg or gasoline is \$3.8/gal.

An example, for a constant driving distance of 300 miles:

Gasoline Vehicle
 Fuel Cost = \$3.8/gallon



Gasoline fillup = ~10.7 gallons
Fill up cost = ~\$41 (3.8 X 10.7)

Hydrogen Fuel Cell Electric Vehicle
 Fuel Cost = \$8/kg → \$3.8/gallon



Hydrogen fillup = ~5.1 kg = 5.1 gge
Fill up cost = ~\$41 (8 X 5.1)

¹gge = gasoline gallon equivalent
 Assumptions: ICE fuel economy = 28 mpg, FCEV fuel economy = 59 mpgge

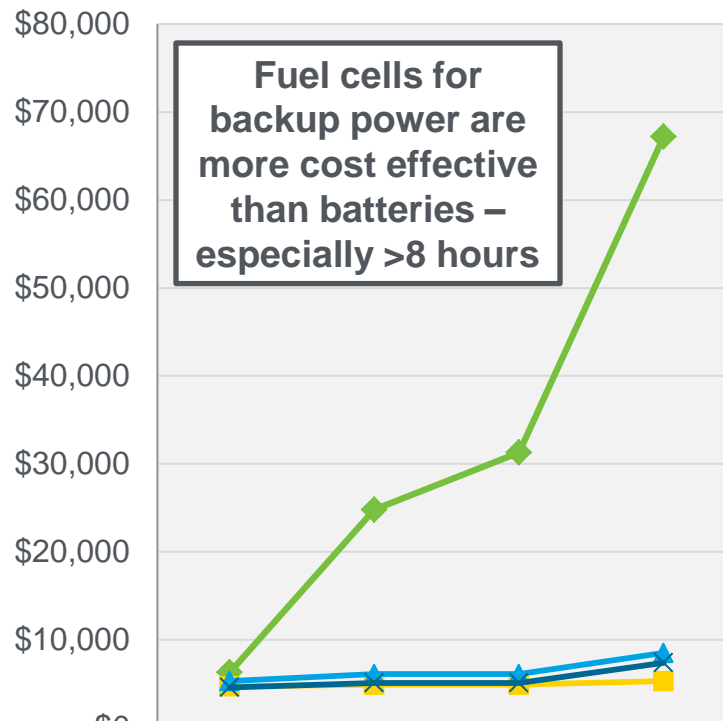
Fuel cells are becoming competitive in early markets!

Class I & II MHE -- Annualized Costs

- Battery / Fuel Cell Maintenance
- Lift Truck Maintenance
- Cost of Infrastructure Warehouse Space
- Cost of Electricity / Hydrogen
- Labor Cost for Battery Charging & H2 Fueling
- Per Lift Cost of Charge/Fuel Infrastructure
- Amortized Cost of Battery / Fuel Cell Packs
- Amortized Cost of Lift



Annualized Cost of Ownership Backup Power



	8 Hours	52 Hours	72 Hours	176 Hours
◆ Battery	\$6,300	\$24,800	\$31,300	\$67,200
■ Diesel	\$4,700	\$4,900	\$4,900	\$5,300
▲ FC	\$5,300	\$6,100	\$6,100	\$8,500
✕ FC*	\$4,600	\$5,100	\$5,100	\$7,400

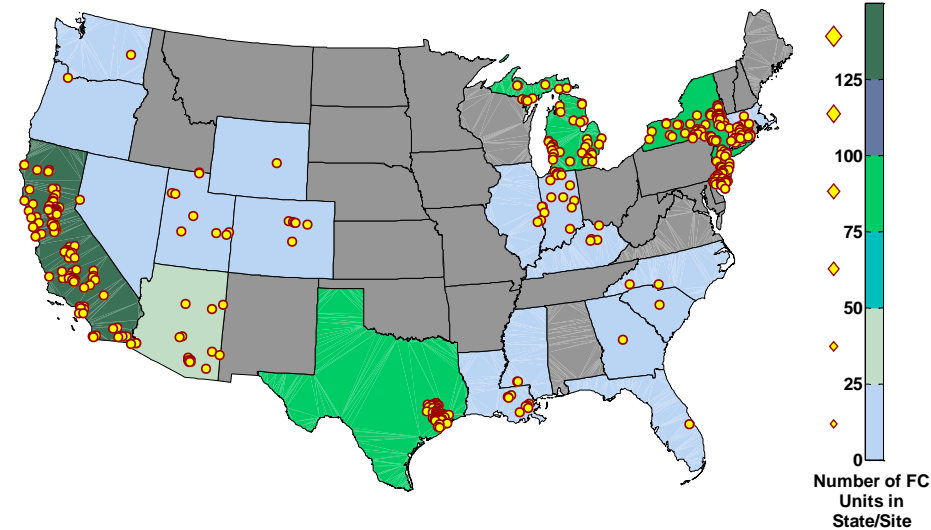
An Evaluation of the Total Cost of Ownership of Fuel Cell-Powered Material Handling Equipment http://www1.eere.energy.gov/hydrogenandfuelcells/pdfs/fuel_cell_mhe_cost.pdf

NREL report Backup Power Cost of Ownership Analysis and Incumbent Technology Comparison FC* = fuel cell with incentives

Validated over 800 backup power units with seven industry partners

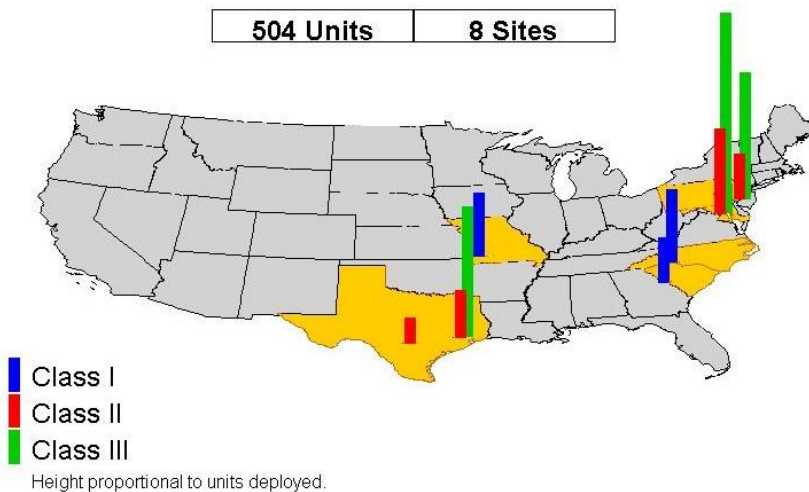
- FedEx Freight East, GENCO, Nuvera Fuel Cells, Plug Power, ReliOn Inc., Sprint Communications, Sysco of Houston -

- 842 units in operation¹
- 1.94 MW installed capacity, average site capacity of 4-6 kW
- 99.7% successful starts (2,579 start attempts)
- 65 continuous hours demonstrated
- >1,600 operation hours



Validated over 450 material handling equipment units with seven industry partners

- 490 units in operation²
- >1,800,000 operation hours, 4.4 average operation hours between fills
- ~230,000 kg of hydrogen dispensed during more than 290,000 hydrogen fills with an average of 0.6 kg per fill



Data from 2009 Q1 to 2013 Q2.

¹Not all systems have detailed data reporting to NREL. ²One project has completed.



a national resource for hydrogen and fuel cell stakeholders supported through Energy Efficiency and Renewable Energy's Fuel Cell Technologies Office



ESIF Dedication, September 2013

http://apps1.eere.energy.gov/news/news_detail.cfm/news_id=19607