

Agenda

1.0

Introduction of W. L. Gore & Associates

2.0 Clean energy ecosystem & challenges

3.0

Technology development for water electrolysis application

- Trade-offs incorporating thin membranes
- Technology for breaking through the trade-off relationship

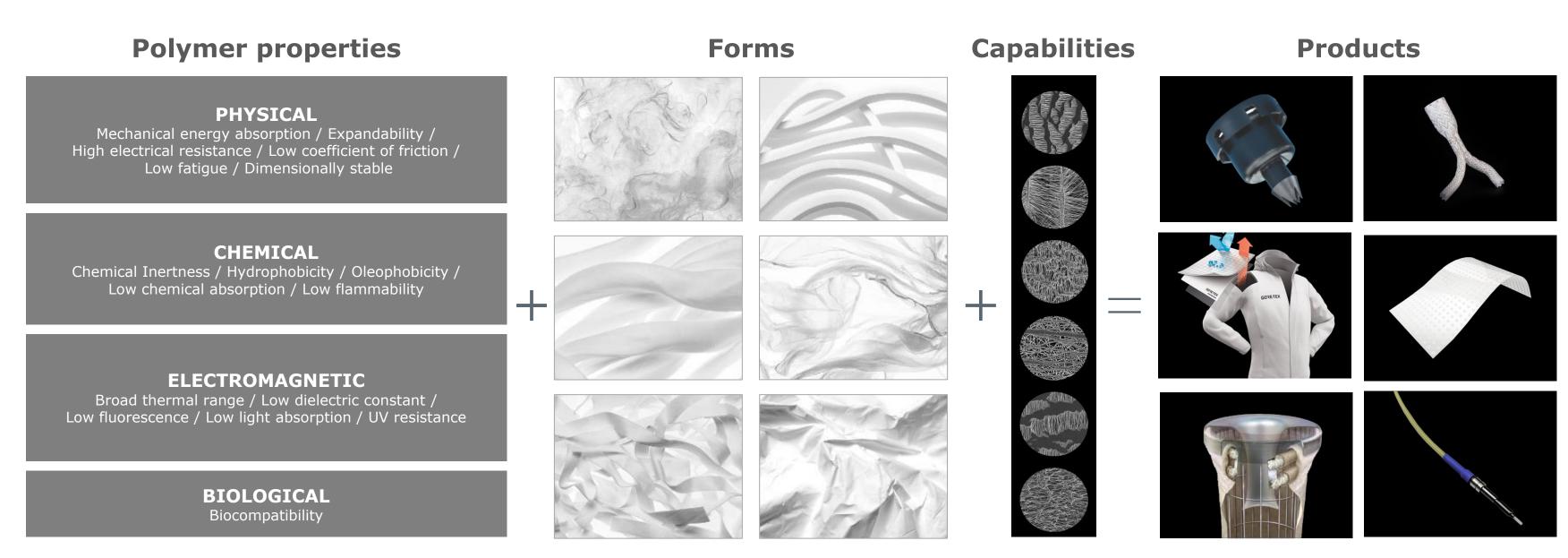




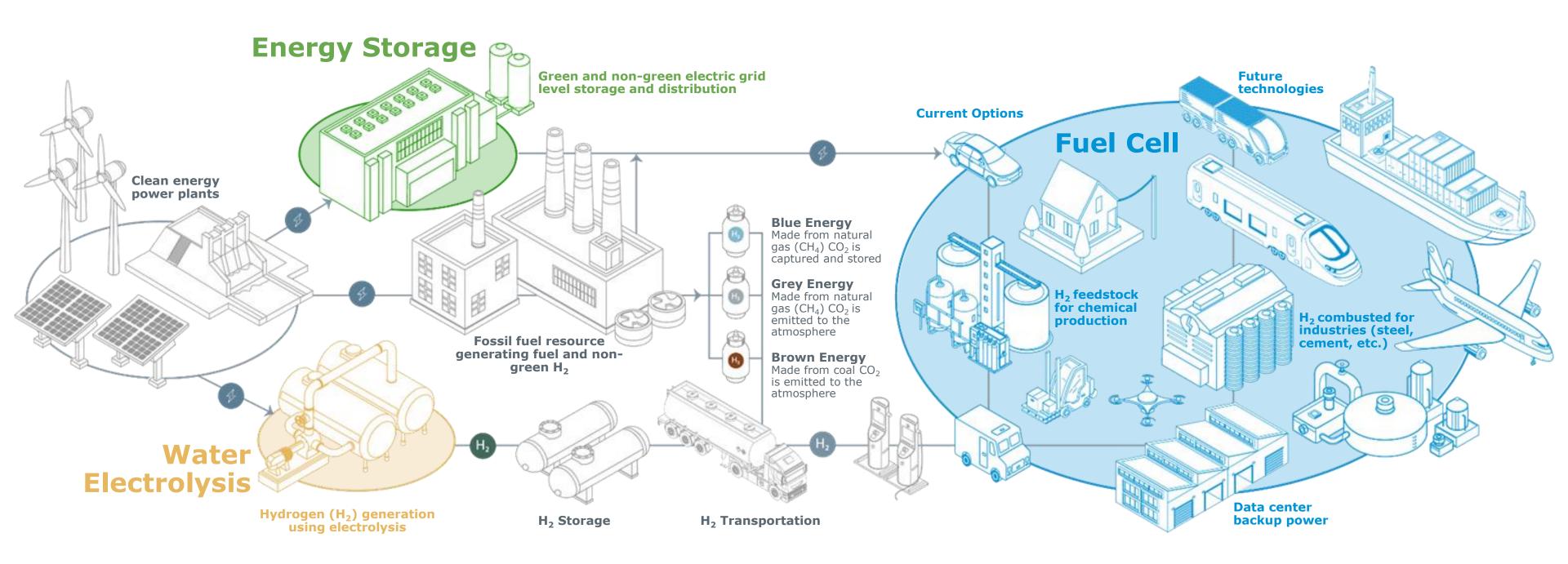
Gore: A global materials science company

Our advanced materials capabilities allow our customers to push boundaries — with confidence.

Our knowledge of diverse materials, including polymers, and our engineering capabilities, enable a wide range of remarkable products.



Clean energy ecosystem for Gore



Levelized cost of hydrogen production - Electrolyzer system



Simpler system, less components, cheaper manufacturing

Operation / Maintenance

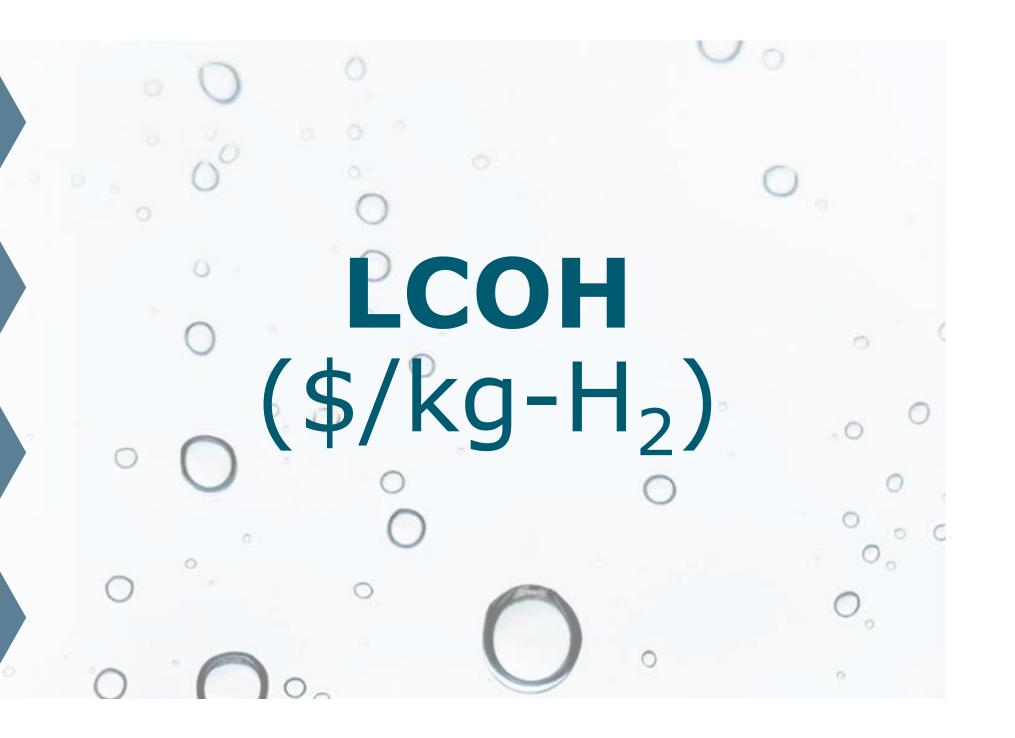
Reliable, relaxed inputs, longevity

Electricity

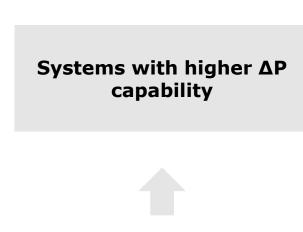
High H₂ output per electricity, less parasitic loss, high utilization, turndown ratio

Other considerations

Grid fees, construction costs, land use and etc.



How can we manage trade-offs to optimize system design?

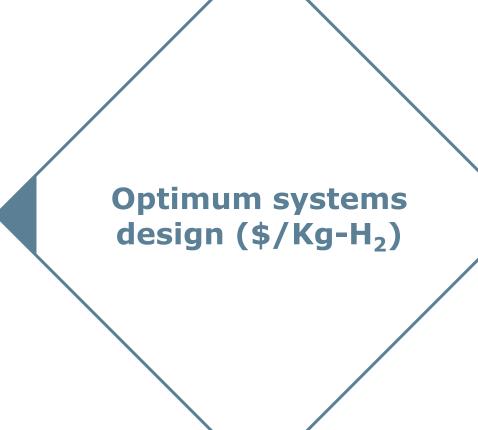


Durable

Reinforced PEM with anti-oxidant additives

Reliable Systems, Low risk failure systems

Optimized materials with the system



H₂ safety operational/turndown range

Optimize PEM permeance and recombination catalysts with the system

System cost reduction (i.e., decreased cell count and Ti and Ir use)



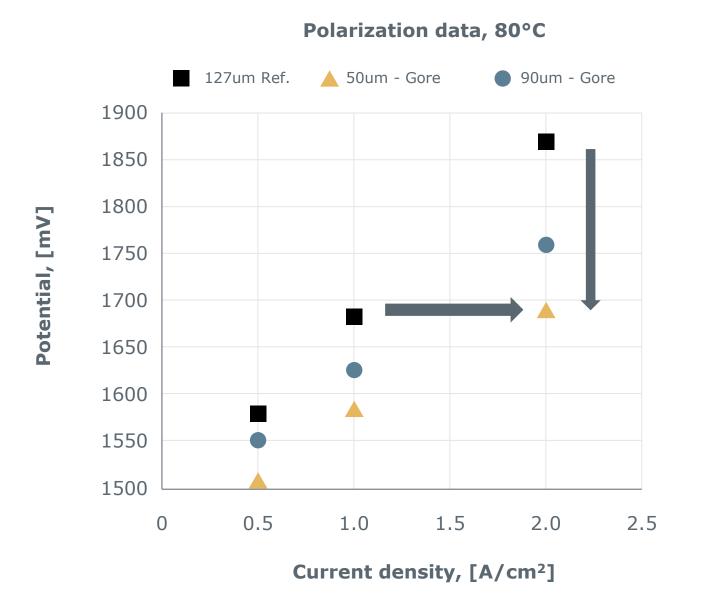
High H₂ output and high voltage efficiency

Thin and high conductance PEM

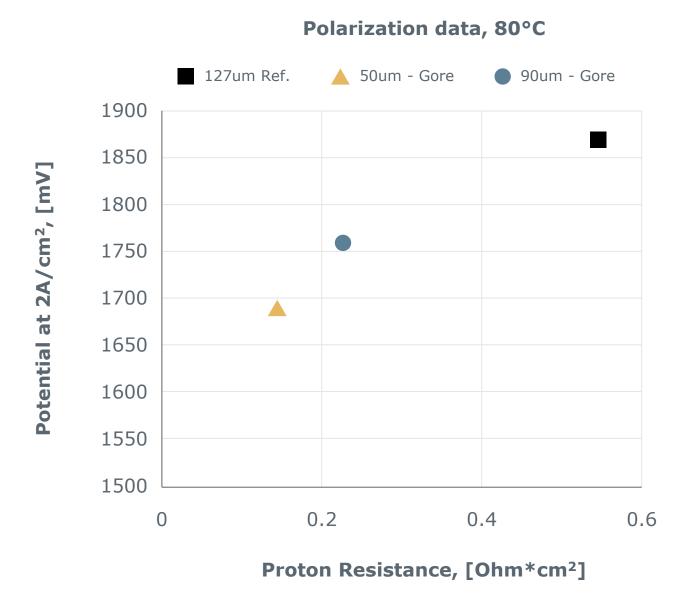


System with greater turn-down capability for intermittent energy sources

Advantage of thin membrane for high power output

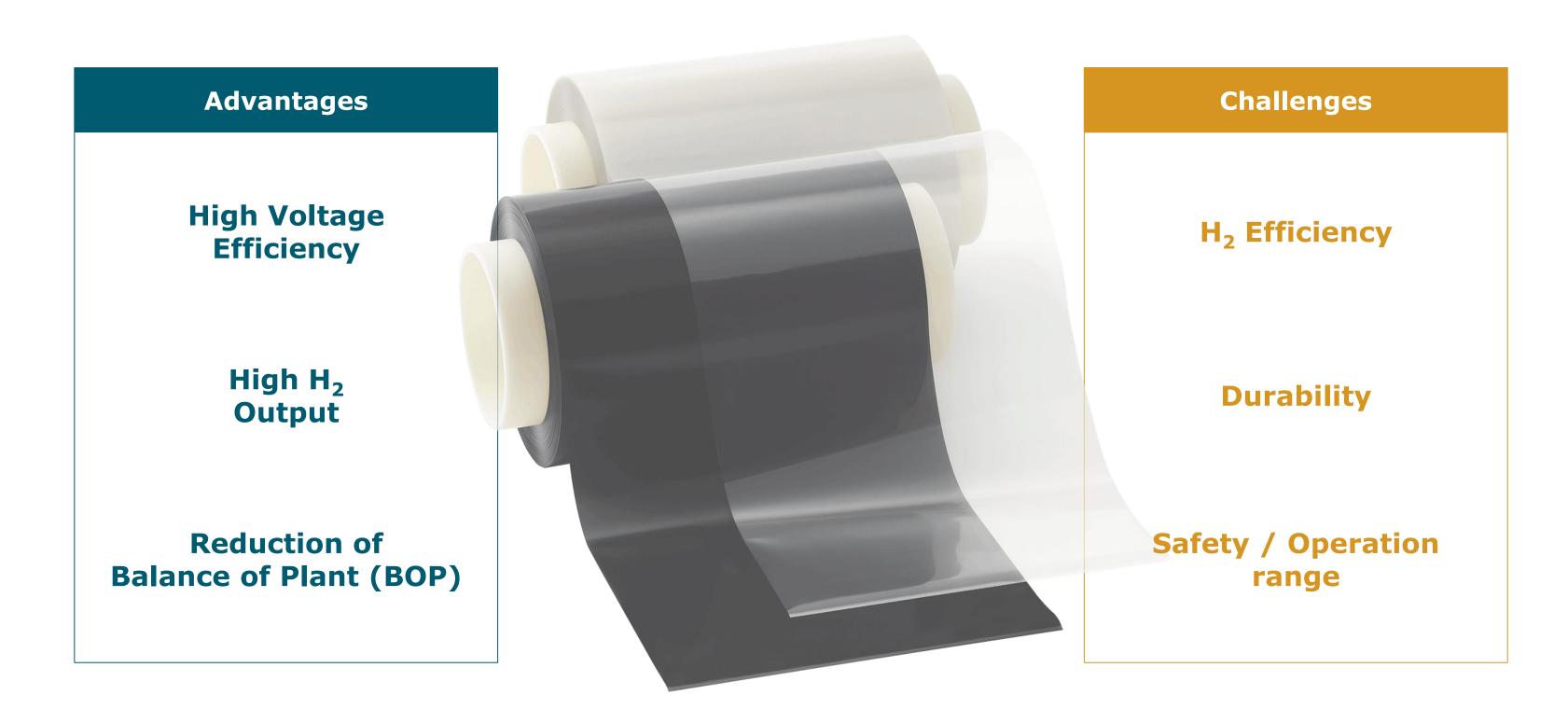


CAPEX \$↓ from increased H₂ output **OPEX** \$↓ from increased voltage efficiency

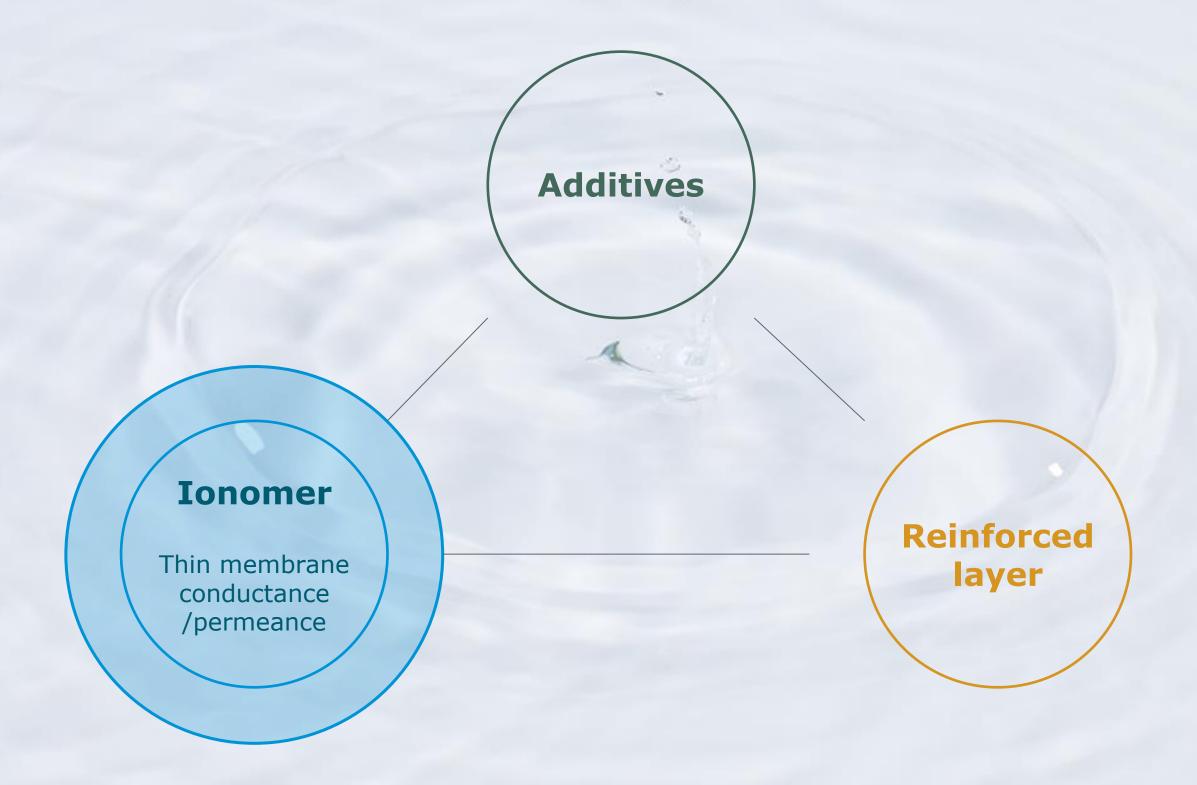


No surprise – membrane resistance is a large controlling factor

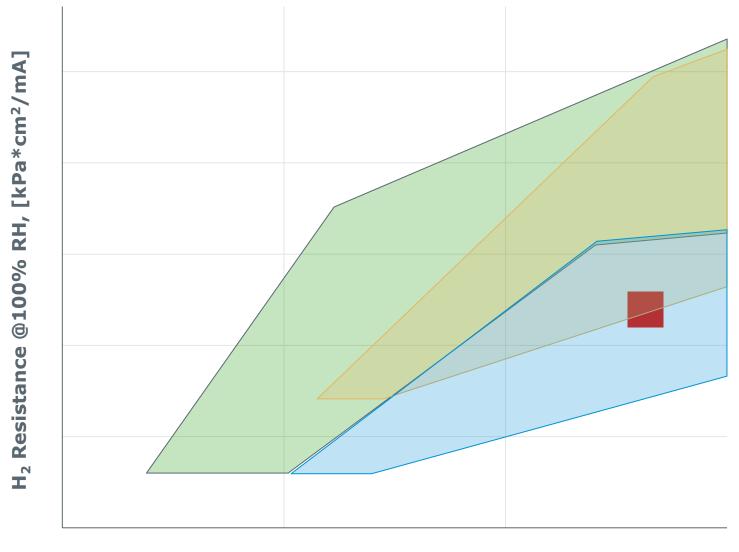
Trade-off between thin membrane and properties



Technology for breaking through the trade-off



Gore proton exchange membrane (PEM) performance space



H⁺ Resistance @100% RH, [ohm*cm²]

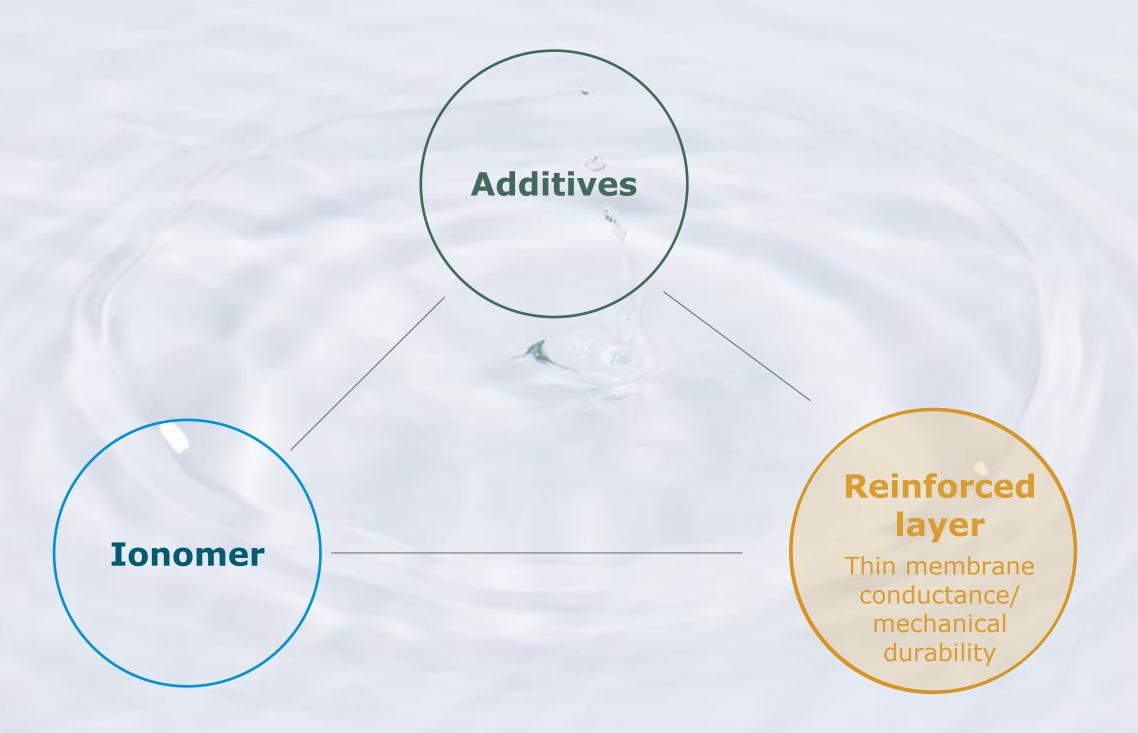
*Shaded space estimated by modeling

Design target considerations:

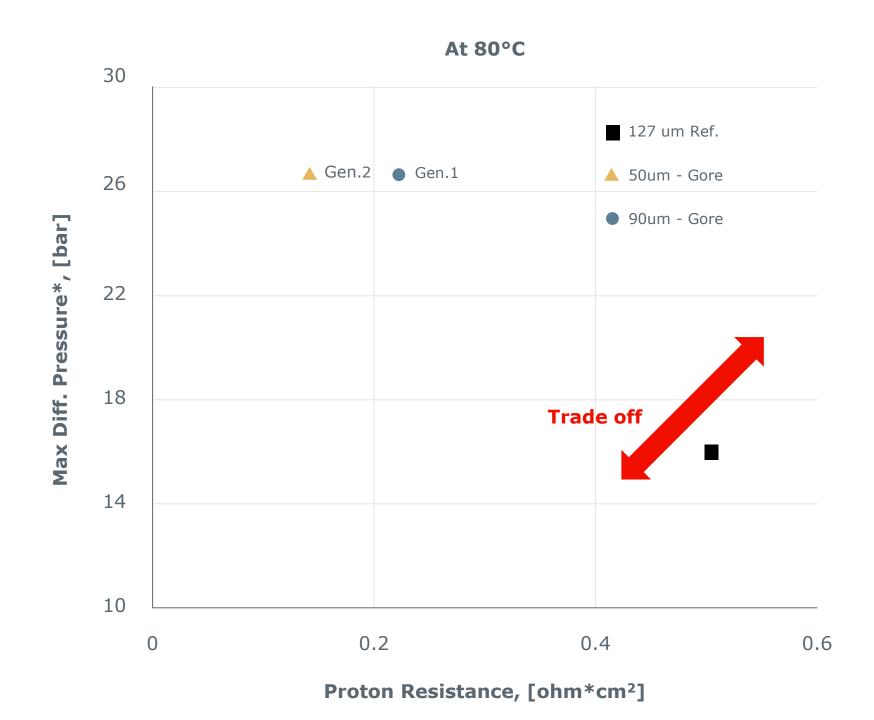
- H⁺ conductance → stack power / efficiency
- H₂ crossover → current efficiency
- Durability requirements
- Contamination
- Mechanical / chemical stressors
- CCM / MEA process requirements

Gore can reduce membrane resistance while maintaining same hydrogen crossover

Technology for breaking through the trade-off



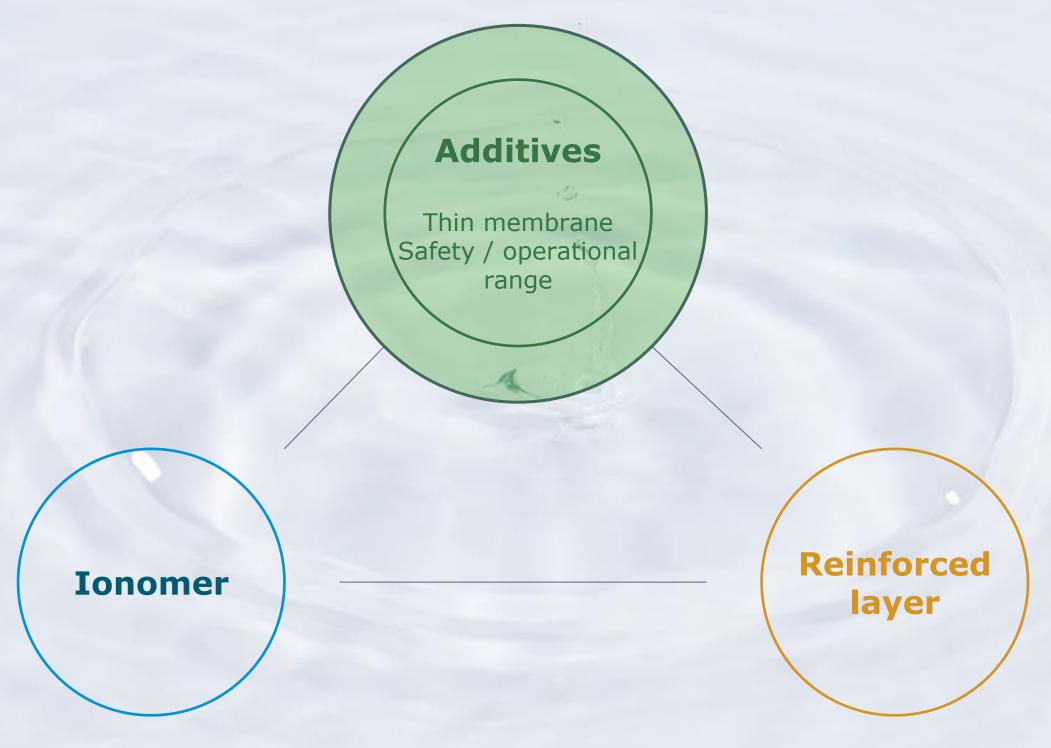
Development of reinforced layer



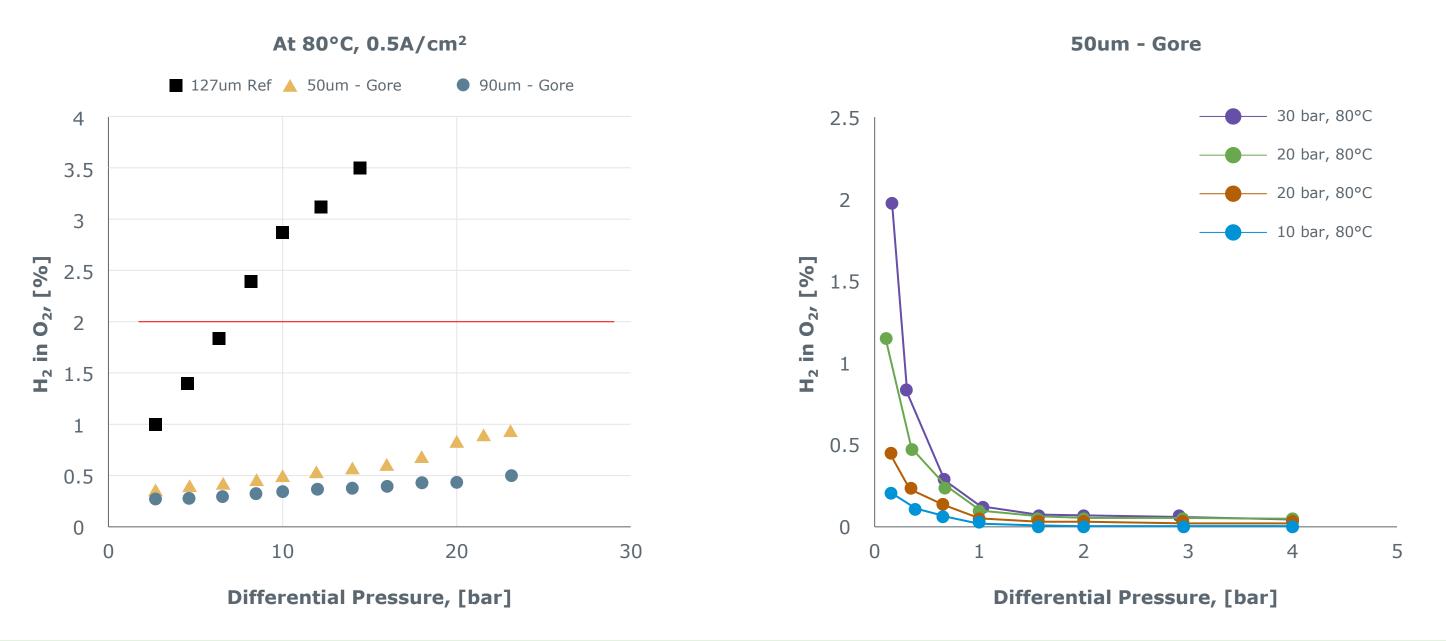
Improved trade-off between performance and mechanical durability by construction and reinforced layer

*Cell design dependent

Technology for breaking through the trade-off

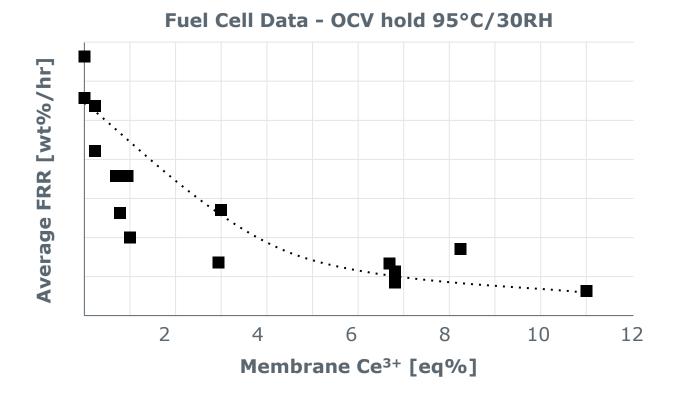


Recombination catalyst (RC) for wider operational range

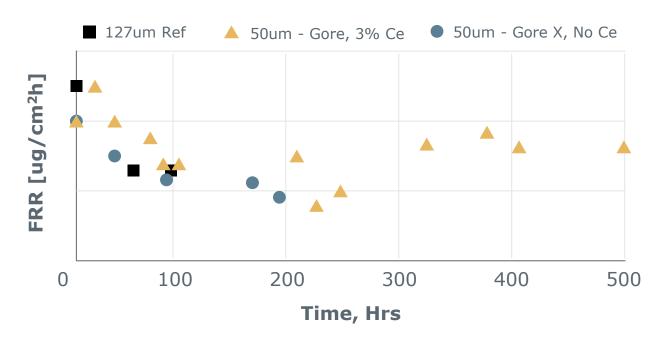


Gore RC technology shows effectiveness at mitigating H_2 in O_2 safety concerns. Enables high system utilization and efficiency through a wide operating range.

Leveraging additives for chemical durability



PEM WE 4 A/cm², 80°C



Cerium (Ce) is a known radical scavenger and an effective mitigation strategy to improve chemical durability in FC systems

Tradeoffs

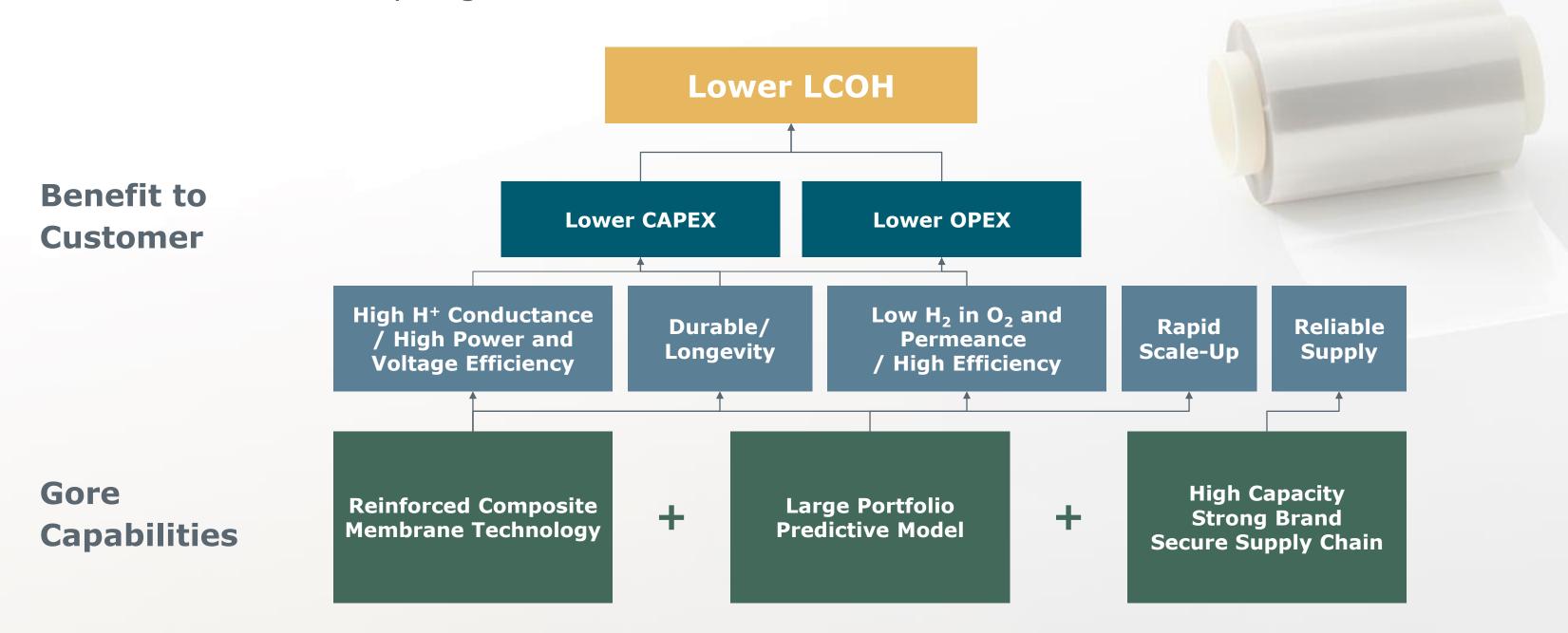
- Mobile, moves under current and can reduce iV performance
- Ion exchange-able, can wash out with reconditioning acid flushes

Electrode and PEM design interact

Optimal MEA design requires partnership

Creating value for a cleaner environment

Reinforced composite membranes enable higher-performing systems for OEMs and lower levelized cost of hydrogen for end-users.



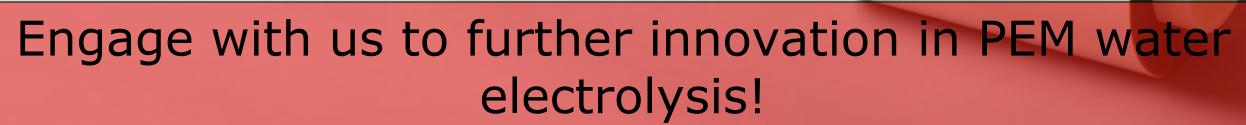
Summary

Gore's core technology is engineering polymers and polymer composites into unique structures.

LCOH is influenced by many factors and close collaboration is paramount.

Trade-offs in membrane design can be mitigated through advanced technology from Gore.

- Track record of delivering high performance materials
- Proven, high-quality, high-volume PEM manufacturing
- Ability to break the "performance/ durability" trade-offs to enable lower LCOH



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