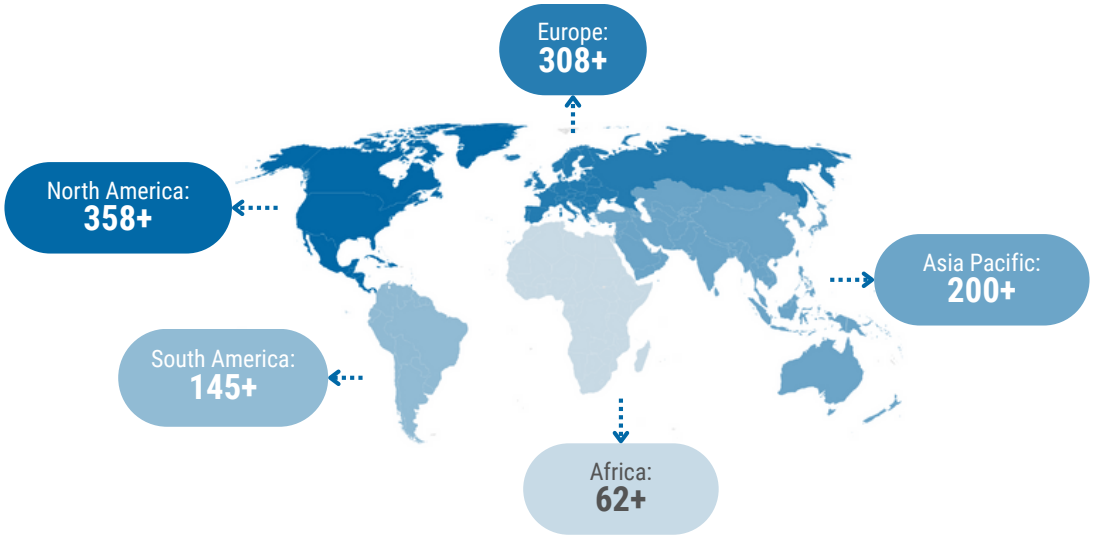
RENEWABLE® THERMAL COLLABORATIVE

SUMMIT 2025

BUYER PROFILES: SUMMARY

Attending buyers are responsible for more than 1,000 facilities worldwide:*



These percentages of surveyed buyers reported using heat at the following temperatures:

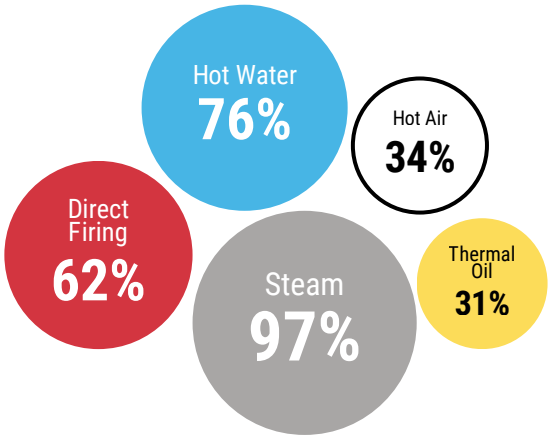
75% Low Temperatures
<130°C

82% Medium Temperatures
130 - 500°C

15% High Temperatures
500 - 1000°C

4% Ultra-High Temperatures
1000+°C

These percentages of surveyed buyers reported delivering heat via the following methods:

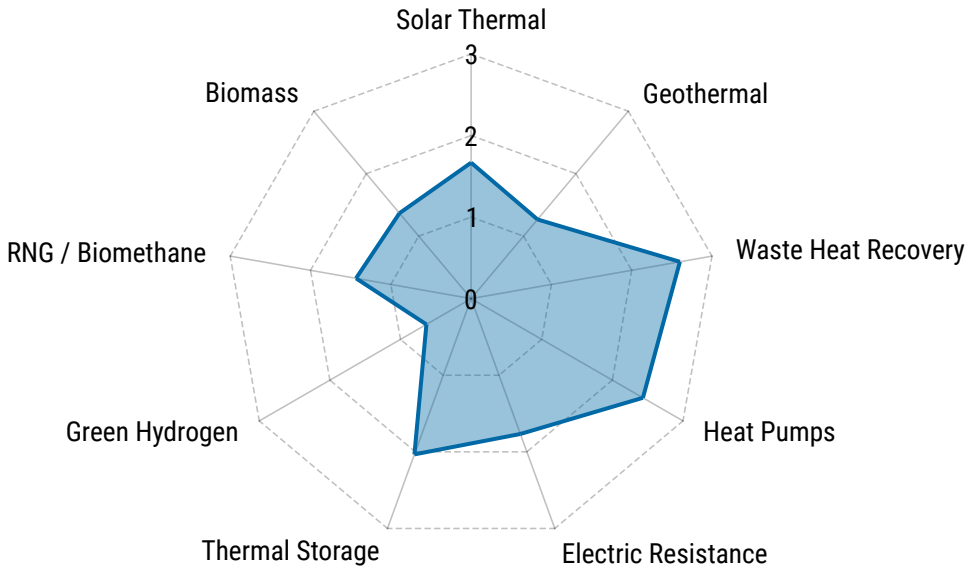


Survey data based on responses submitted by 30 buyer staff out of 62 total attending the event.

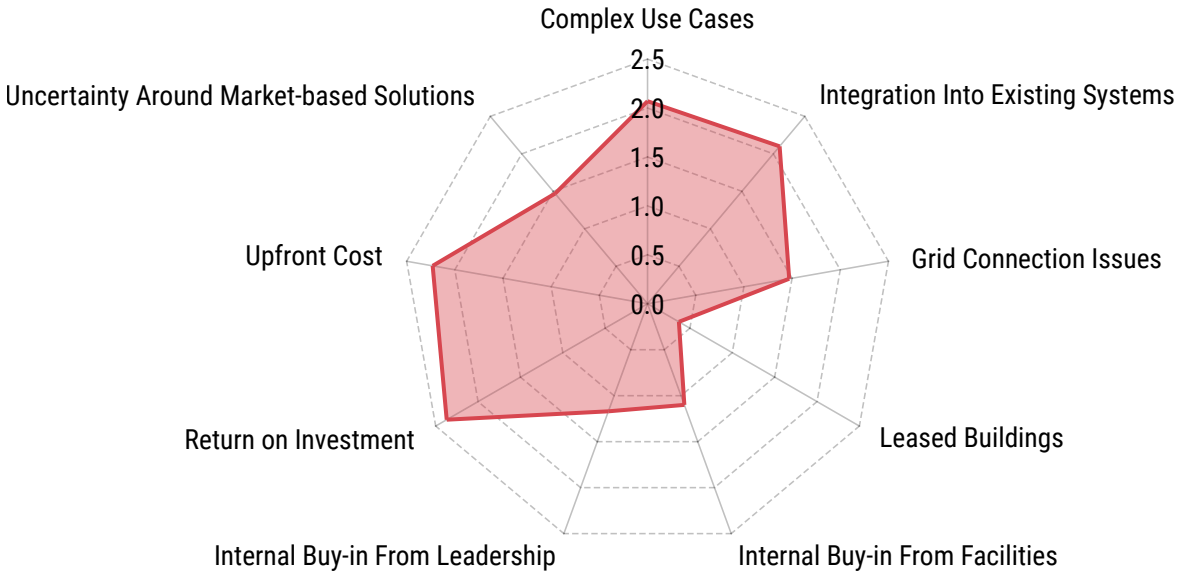
* Facilities count represents the most conservative total number of facilities reported by the 30 survey respondents, who indicated ranges of facility counts in each continent. Therefore, the listed sum of facilities represented by attending buyer staff is likely an underestimate.

BUYER PROFILES: SUMMARY

Average interest from buyers in different renewable thermal technologies (0-3 scale):



Average ratings given by buyers to different challenges facing their thermal decarbonization efforts (0-3 scale):



RENEWABLE® THERMAL COLLABORATIVE

SUMMIT 2025

DO NOT SHARE: Information intended for survey respondents only.

REYNOLDS
A BETTER TOMORROW

ESTEFANY ACUÑA

Lead Manager - Sustainability

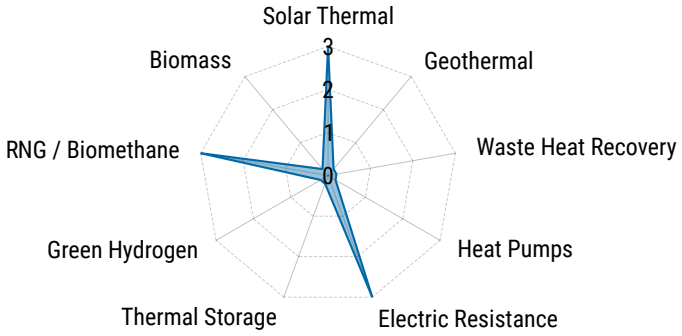
Reynolds American Inc.

acunae1@rjrt.com

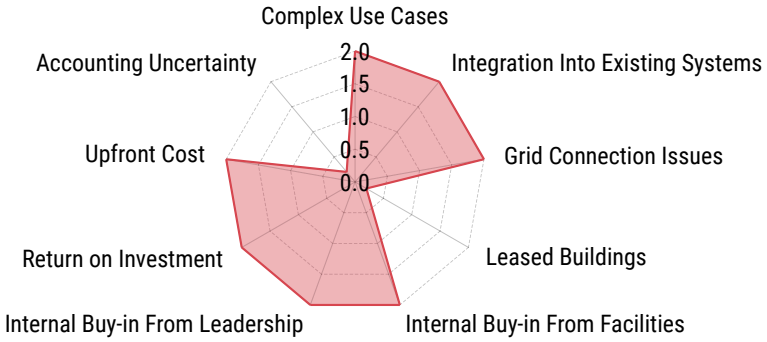
HEAT DELIVERY METHODS

Hot Water | Steam

INTEREST IN TECHNOLOGIES

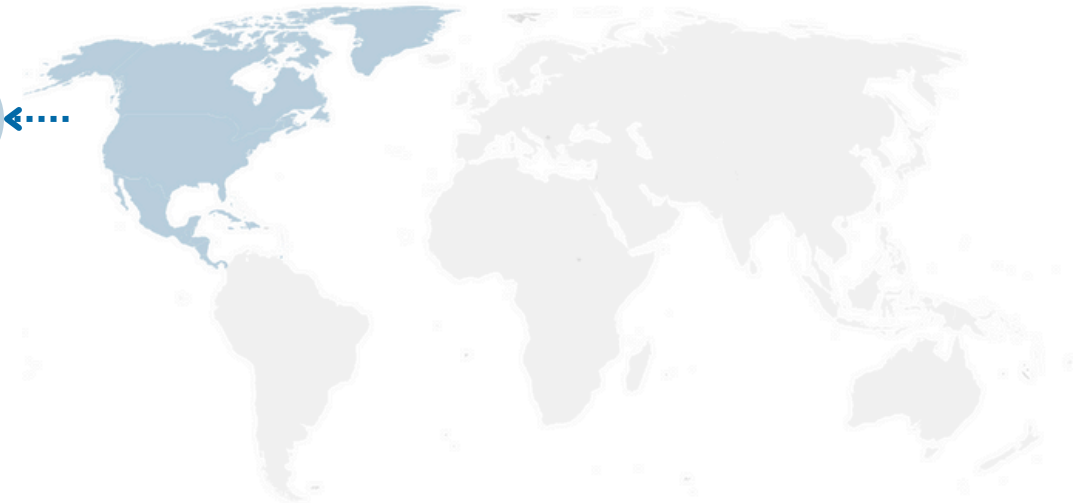


GREATEST CHALLENGES



FACILITIES FOOTPRINT

North America:
1 - 10
facilities



RENEWABLE® THERMAL COLLABORATIVE

SUMMIT 2025

EMILY ADAMS

Sustainability Process Engineer

Ball Corporation

eadams@ball.com

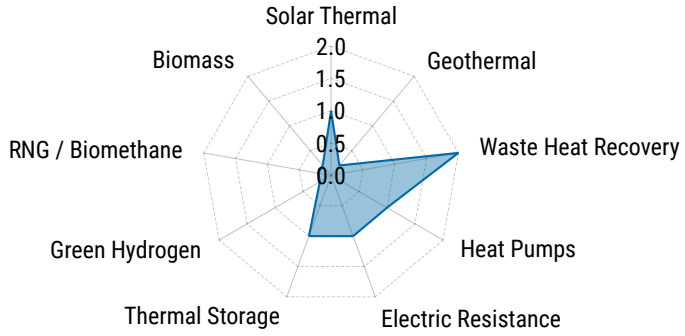
TEMPERATURE DEMAND

Low (<130°C) | Medium (130-500°C)

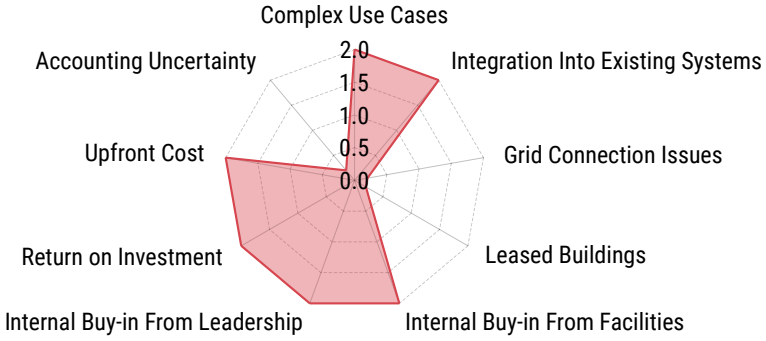
HEAT DELIVERY METHODS

Hot Air | Hot Water | Steam

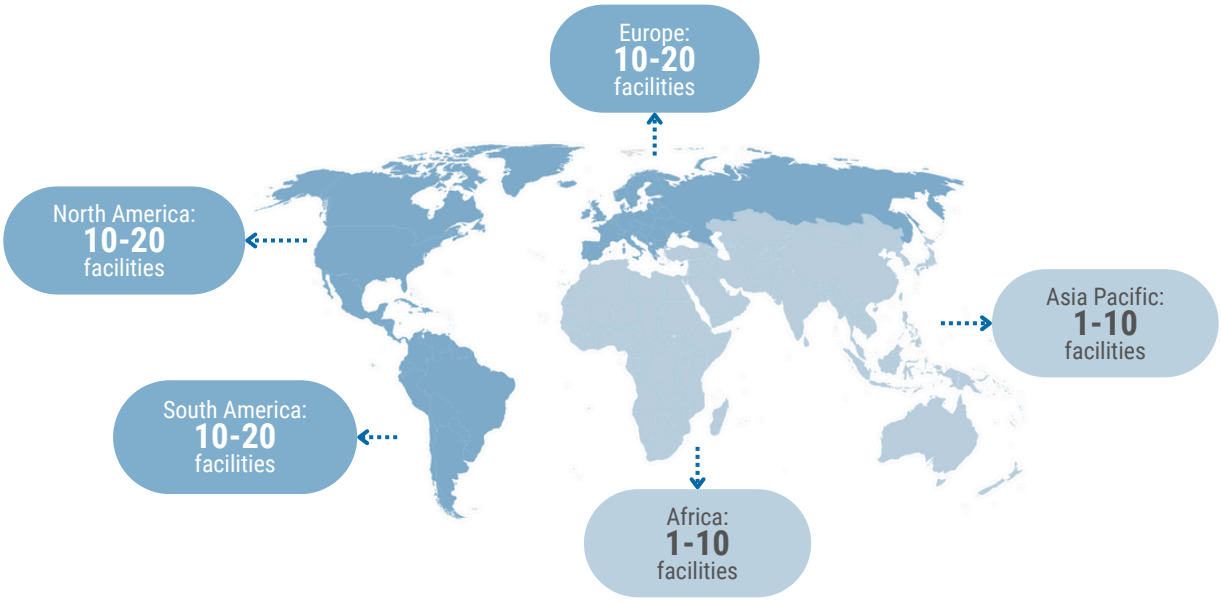
INTEREST IN TECHNOLOGIES



GREATEST CHALLENGES



FACILITIES FOOTPRINT



RENEWABLE® THERMAL COLLABORATIVE

SUMMIT 2025

MARS
Tomorrow starts today

STAV CAPLAN

Sustainability Engineer

Mars Wrigley

stav.caplan@effem.com

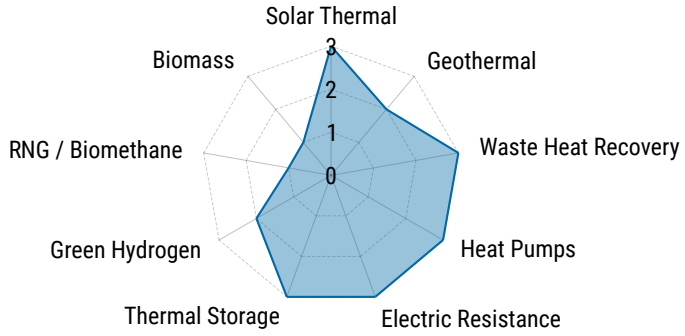
TEMPERATURE DEMAND

Low (<130°C)

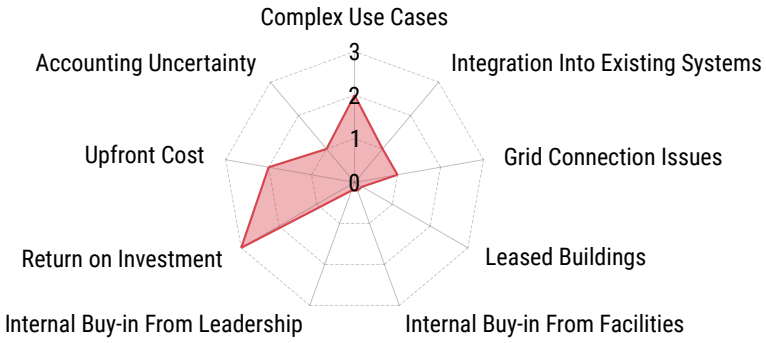
HEAT DELIVERY METHODS

Hot Water | Steam

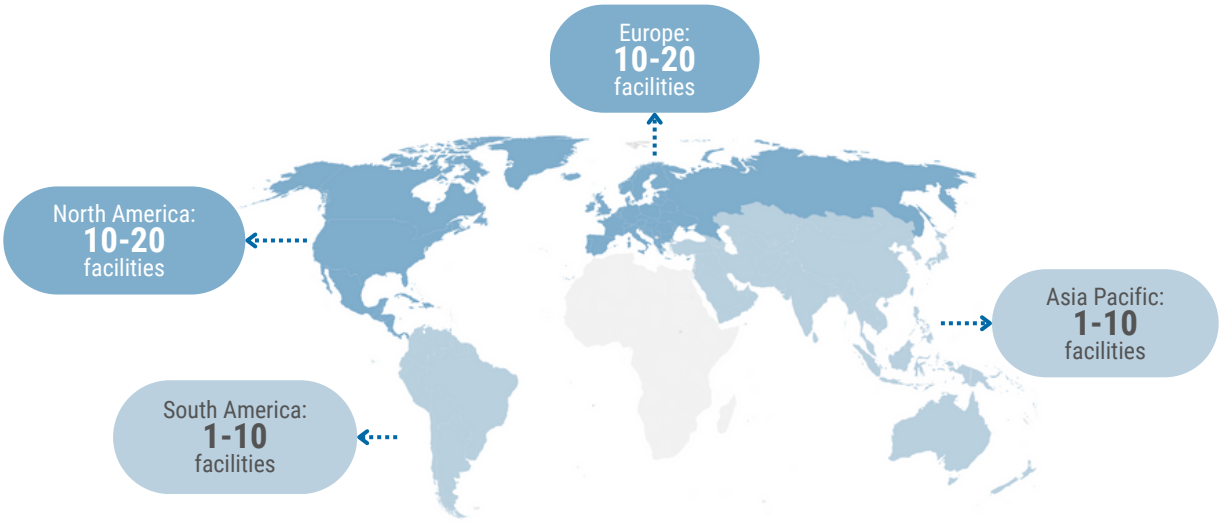
INTEREST IN TECHNOLOGIES



GREATEST CHALLENGES



FACILITIES FOOTPRINT



RENEWABLE® THERMAL COLLABORATIVE

SUMMIT 2025

MARS
Tomorrow starts today

WINSTON CHEN

Global Renewable Program Manager

Mars Wrigley

winston.chen@effem.com

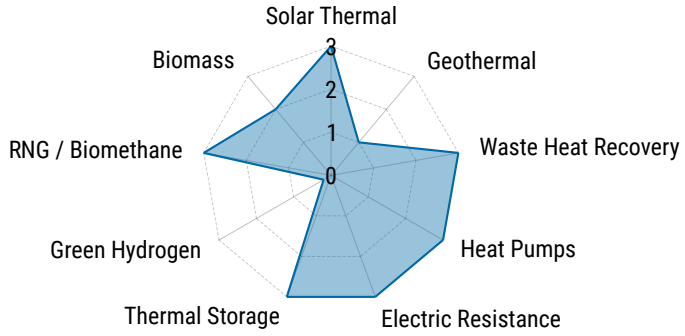
TEMPERATURE DEMAND

Low (<130°C) | Medium (130-500°C)

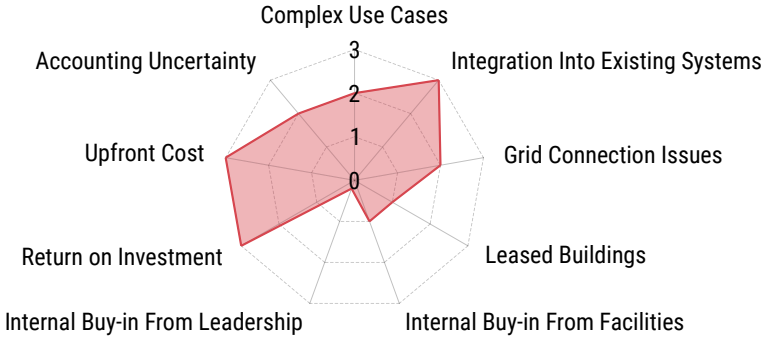
HEAT DELIVERY METHODS

Direct Firing | Hot Air | Hot Water | Steam

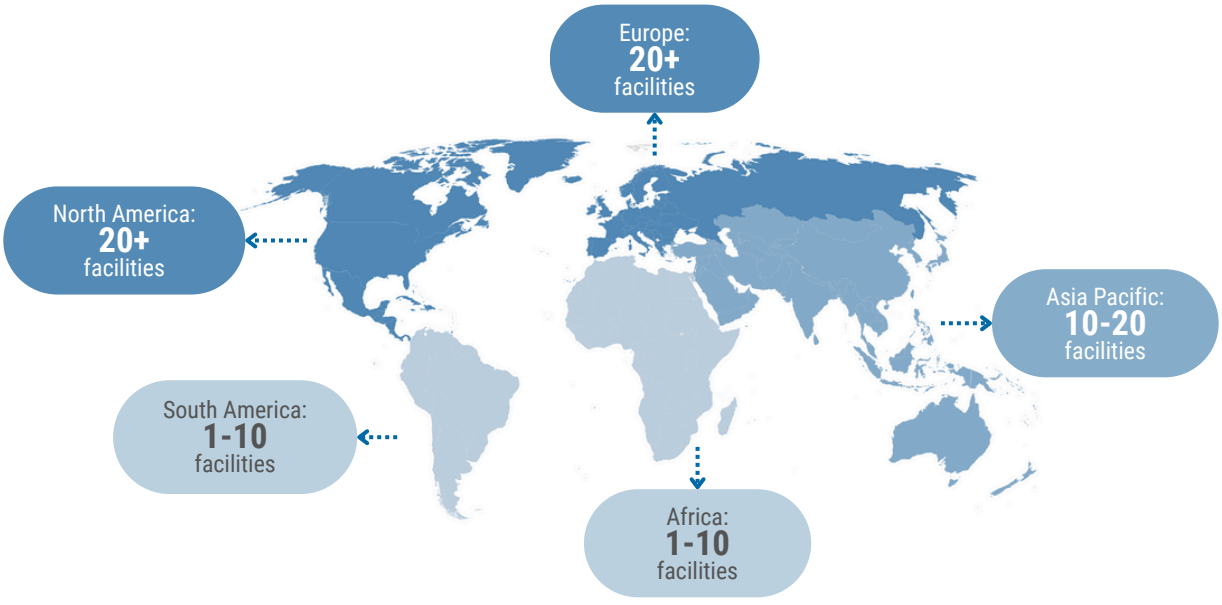
INTEREST IN TECHNOLOGIES



GREATEST CHALLENGES



FACILITIES FOOTPRINT



RENEWABLE® THERMAL COLLABORATIVE

SUMMIT 2025

IBRAHIM CISSE

Senior Sustainability Engineer

ASR Group

ibrahim.cisse@asr-group.com

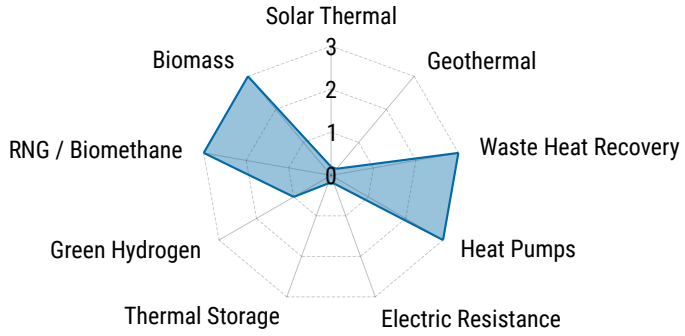
TEMPERATURE DEMAND

Medium (130-500°C)

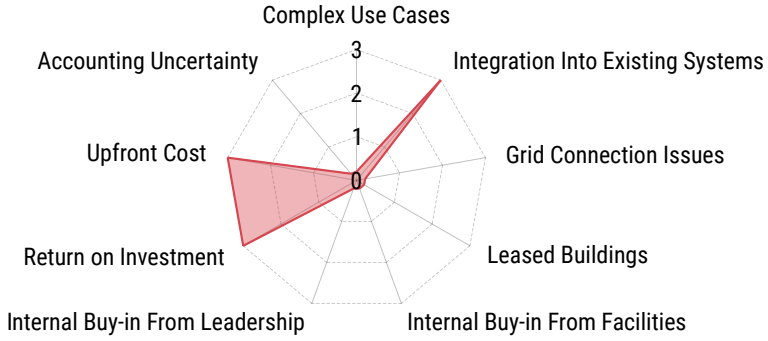
HEAT DELIVERY METHODS

Steam

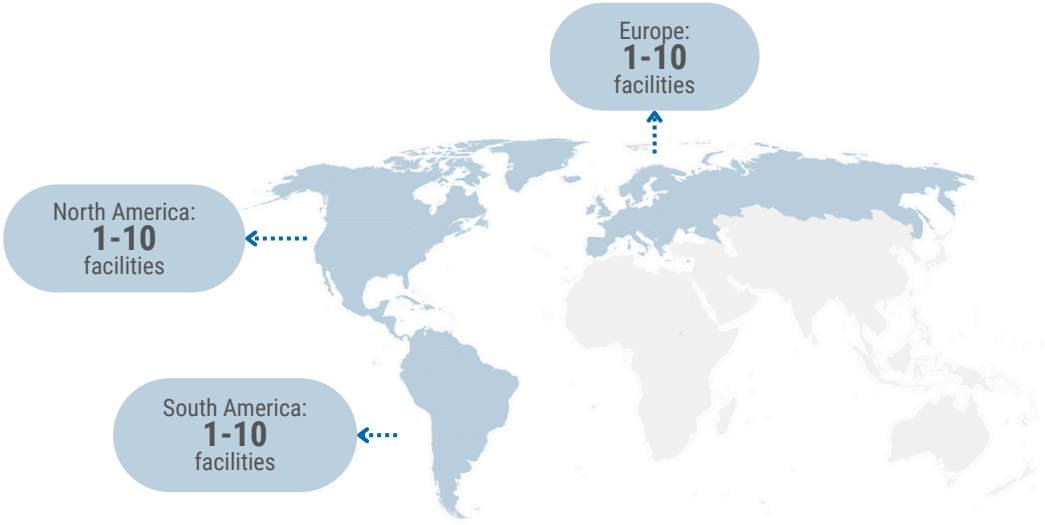
INTEREST IN TECHNOLOGIES



GREATEST CHALLENGES



FACILITIES FOOTPRINT



RENEWABLE® THERMAL COLLABORATIVE

SUMMIT 2025

DO NOT SHARE: Information intended for survey respondents only.

Cargill®

ANDREW COCKAYNE

Global Steam and Power Generation Lead

Cargill PLC

andrew_cockayne@cargill.com

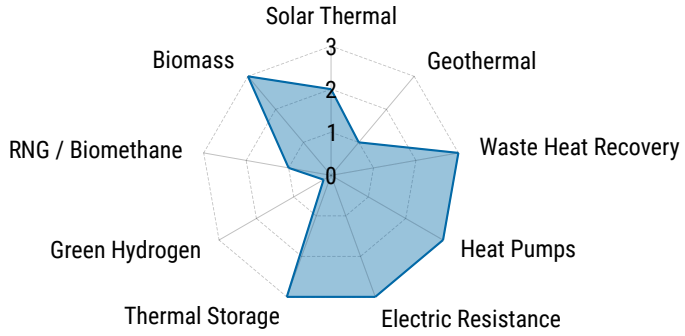
TEMPERATURE DEMAND

Low (<130°C) | Medium (130-500°C) | High (500-1000°C) | Ultra-High (1000+°C)

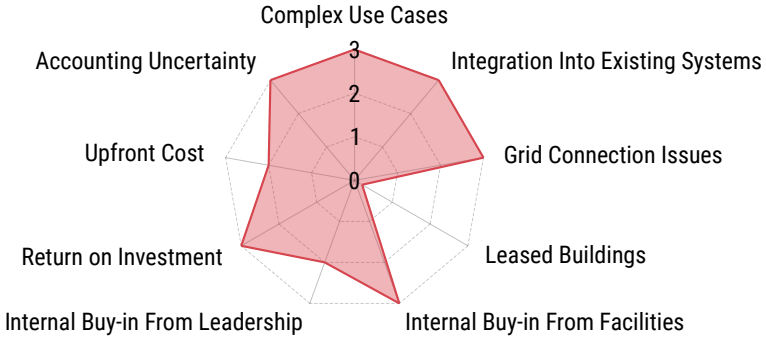
HEAT DELIVERY METHODS

Direct Firing | Hot Air | Hot Water | Steam

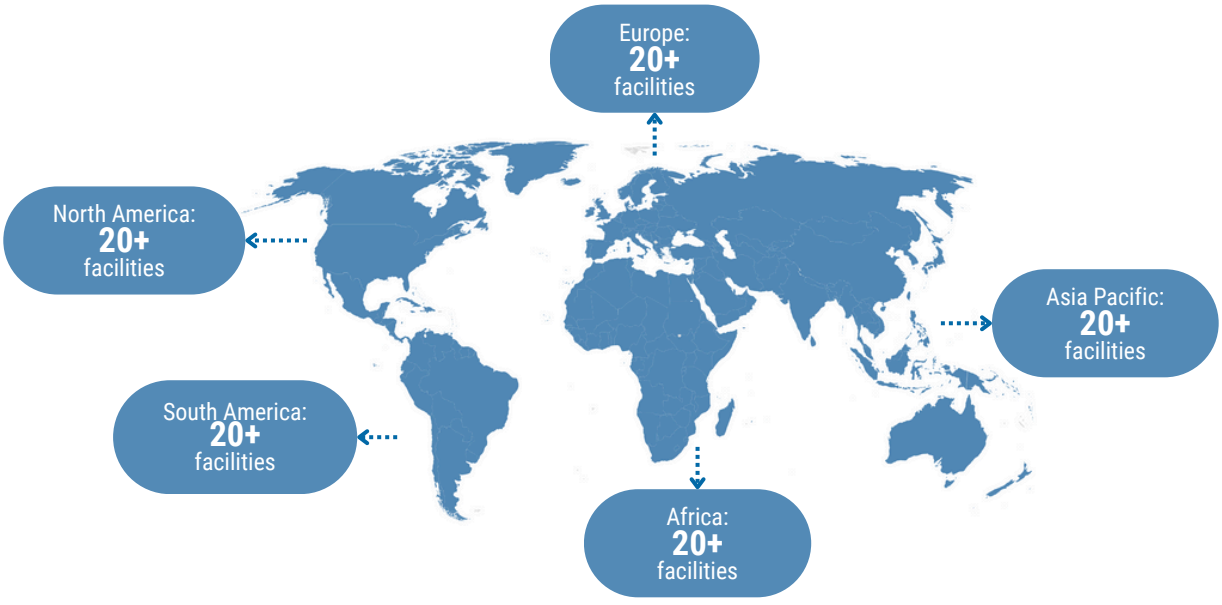
INTEREST IN TECHNOLOGIES



GREATEST CHALLENGES



FACILITIES FOOTPRINT



RENEWABLE® THERMAL COLLABORATIVE

SUMMIT 2025

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International Paper

JOHN DAVIES

EMEA Sustainability Director

International Paper / DS Smith

john.davies@dssmith.com

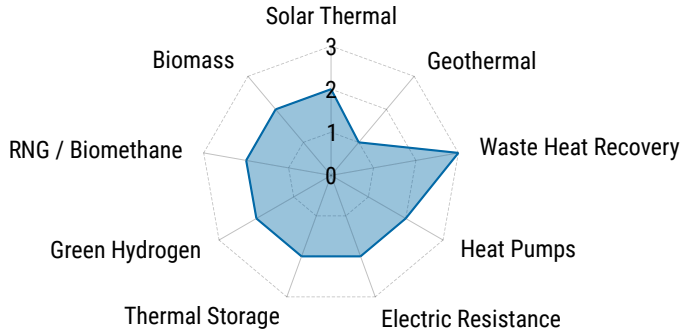
TEMPERATURE DEMAND

Medium (130-500°C)

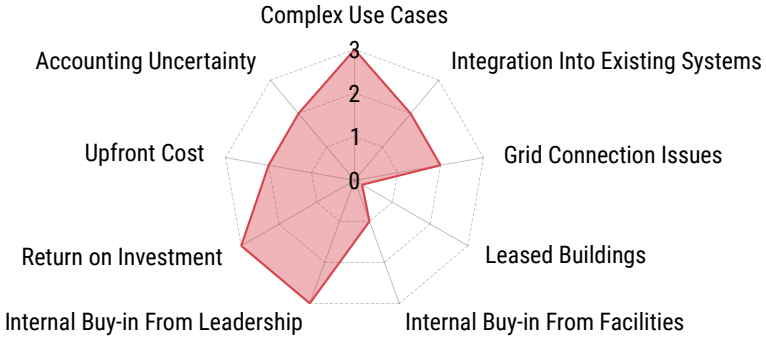
HEAT DELIVERY METHODS

Steam

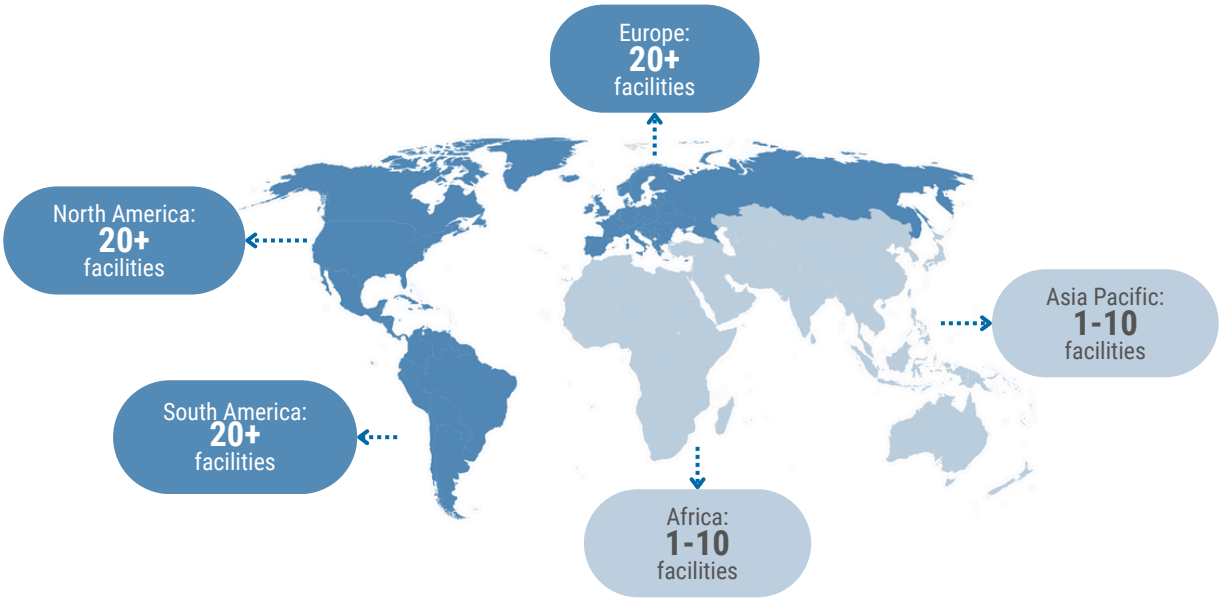
INTEREST IN TECHNOLOGIES



GREATEST CHALLENGES



FACILITIES FOOTPRINT



RENEWABLE® THERMAL COLLABORATIVE

SUMMIT 2025

Givaudan

JEREMY DE LAAT

Global Environmental Sustainability Manager Operations

Givaudan

jeremy.de_laat@givaudan.com

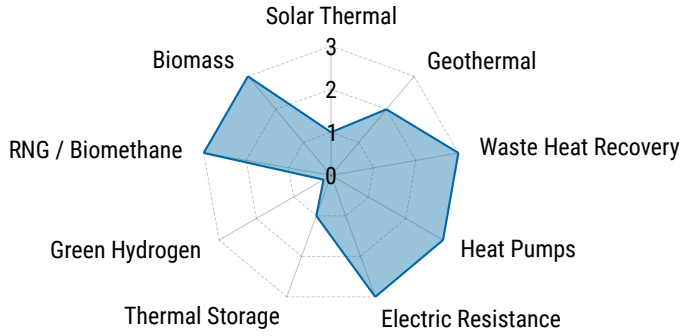
TEMPERATURE DEMAND

Low (<130°C) | Medium (130-500°C)

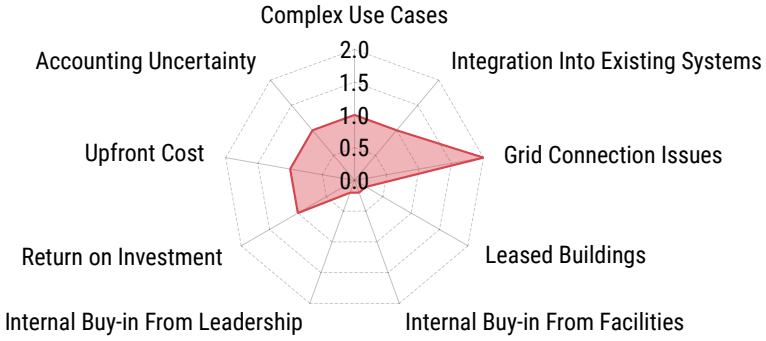
HEAT DELIVERY METHODS

Direct Firing | Hot Air | Hot Water | Steam | Thermal Oil

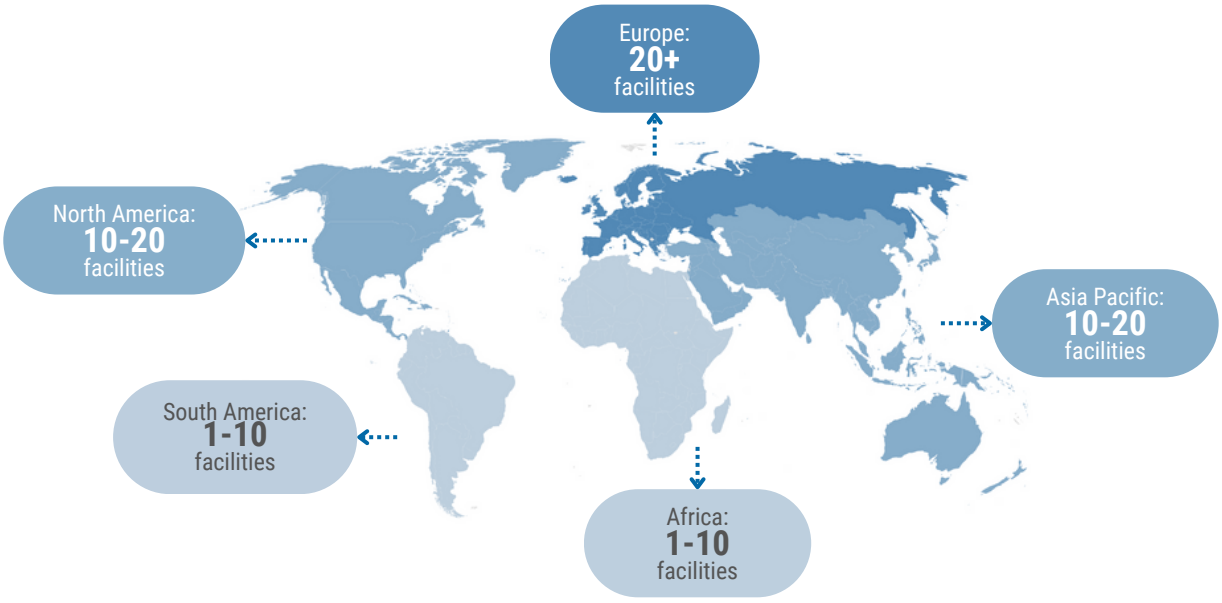
INTEREST IN TECHNOLOGIES



GREATEST CHALLENGES



FACILITIES FOOTPRINT



RENEWABLE® THERMAL COLLABORATIVE

SUMMIT 2025

niagara

ALBERTO GIRON

Senior Sustainability Manger

Niagara Bottling LLC

cgiron@niagarawater.com

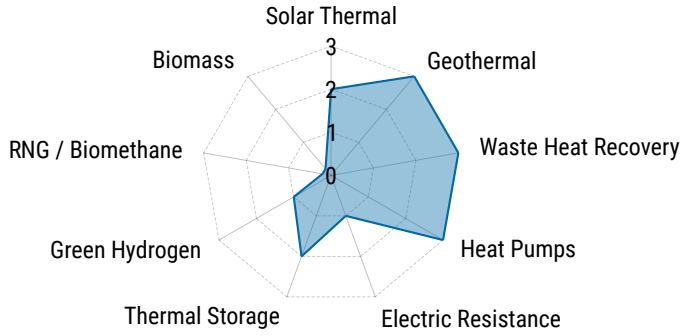
TEMPERATURE DEMAND

Low (<130°C) | Medium (130-500°C)

HEAT DELIVERY METHODS

Direct Firing | Hot Water | Steam

INTEREST IN TECHNOLOGIES



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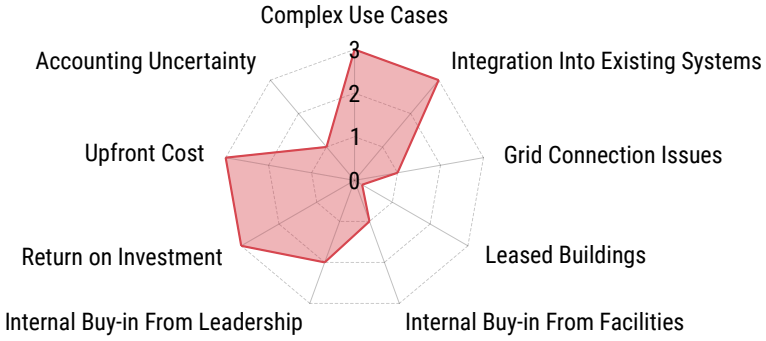

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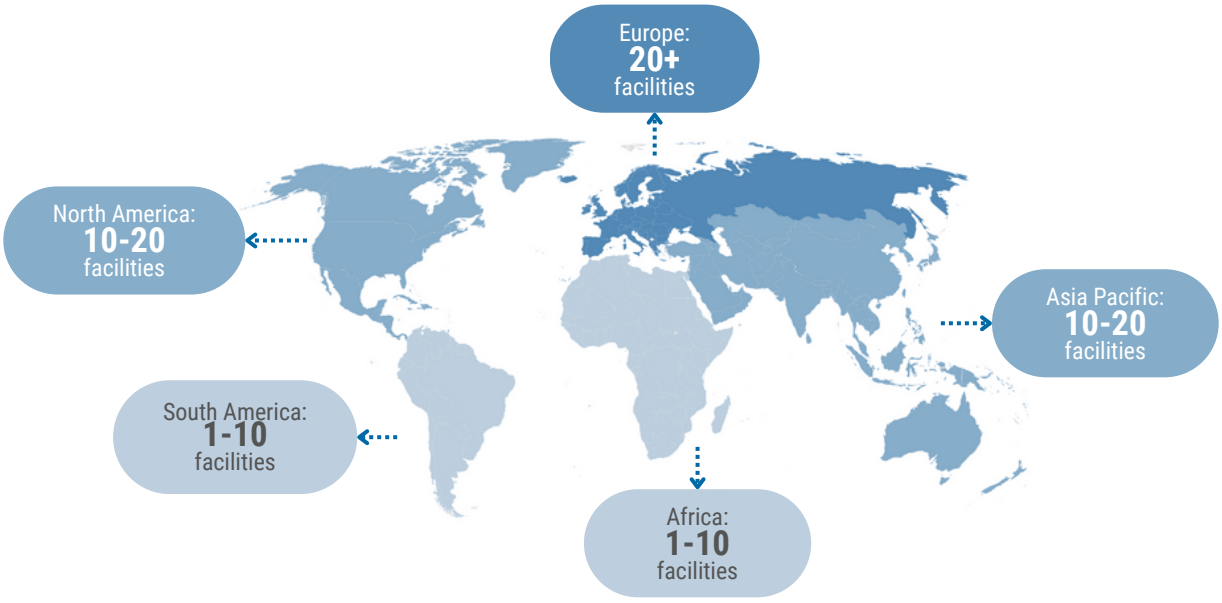


RENEWABLE® THERMAL COLLABORATIVE

SUMMIT 2025

DO NOT SHARE: Information intended for buyers only.

UMESH GOSWAMI

Sustainable Operations Enabler

Roche

umesh_c.goswami@roche.com

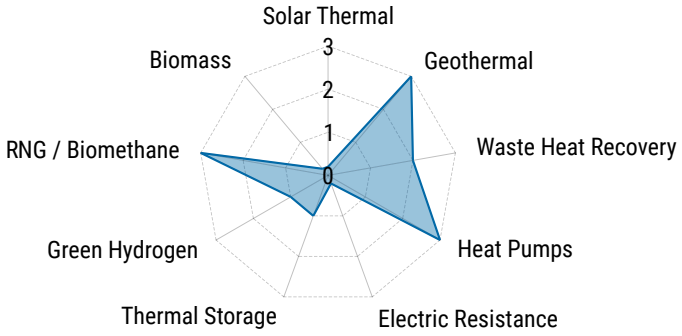
TEMPERATURE DEMAND

Low (<130°C)

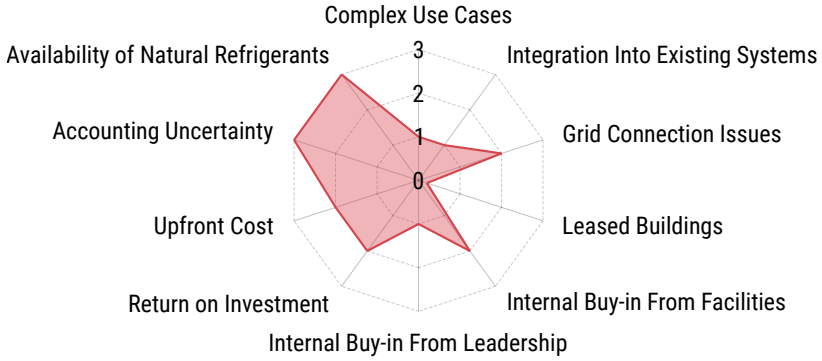
HEAT DELIVERY METHODS

Hot Water | Steam

INTEREST IN TECHNOLOGIES



GREATEST CHALLENGES



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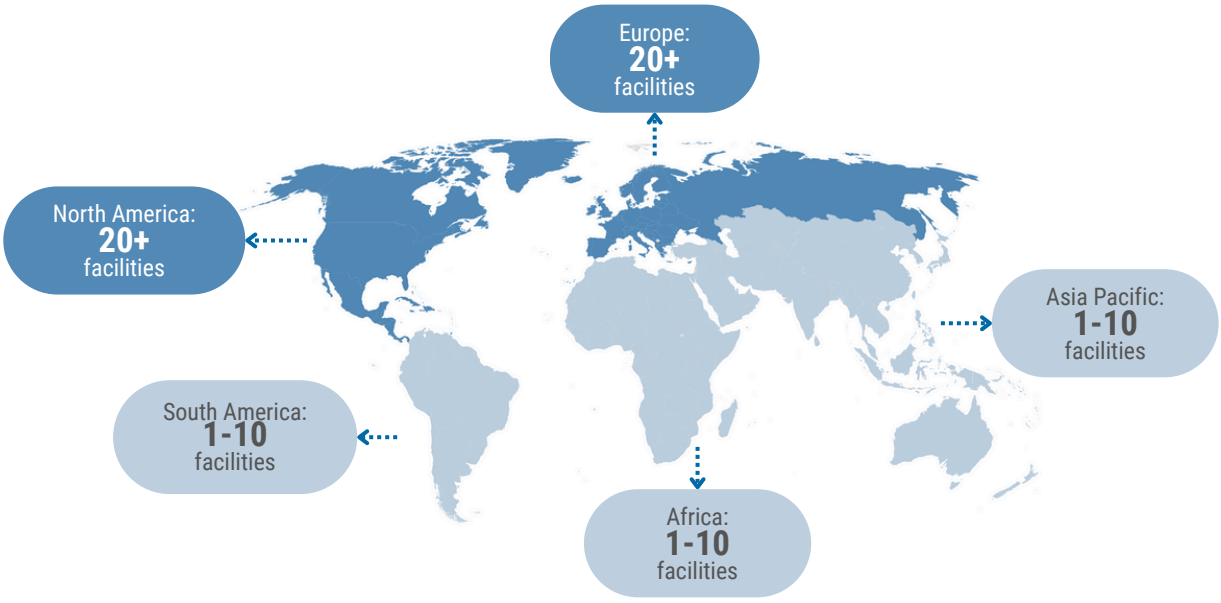


RENEWABLE® THERMAL COLLABORATIVE

SUMMIT 2025

Bristol Myers Squibb™

ALEX HILD

Associate Director, Sustainability Enablement

Bristol Myers Squibb

alexander.hild@bms.com

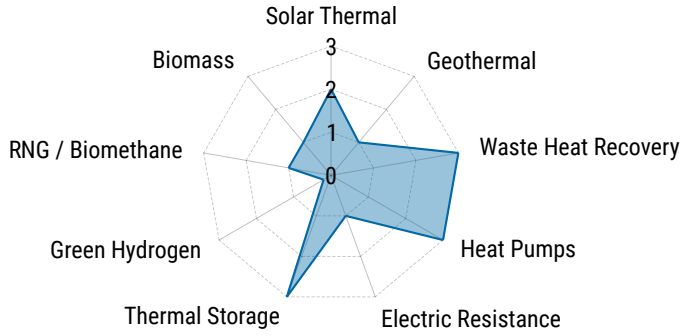
TEMPERATURE DEMAND

Low (<130°C)

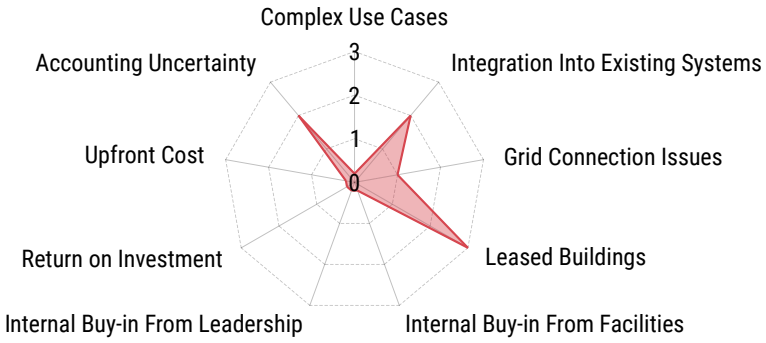
HEAT DELIVERY METHODS

Hot Water | Steam

INTEREST IN TECHNOLOGIES



GREATEST CHALLENGES



FACILITIES FOOTPRINT

RENEWABLE® THERMAL COLLABORATIVE

SUMMIT 2025

DO NOT SHARE: Information intended for survey respondents only.

SAVENCIA FROMAGE & DAIRY

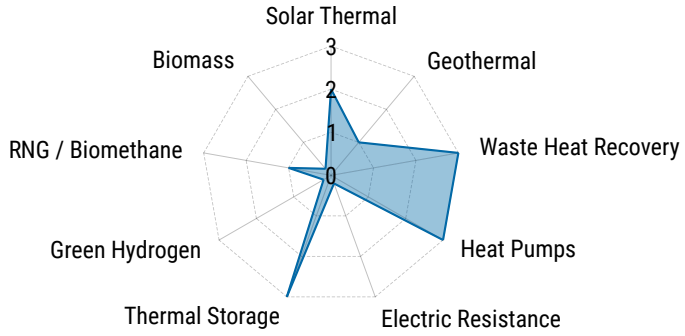
DIANE MOTEL

CSR Manager

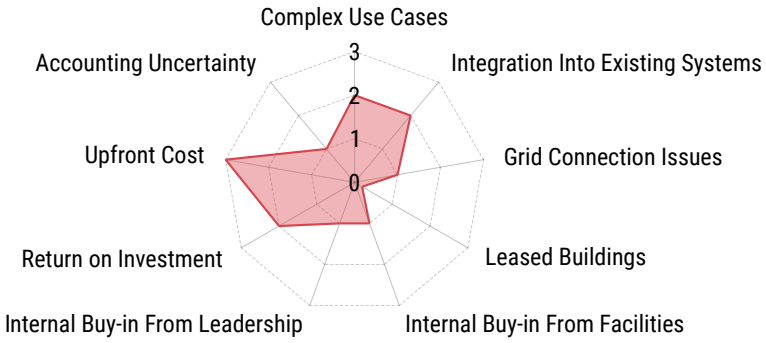
Savencia Cheese USA

diane.motel@savencia.com

INTEREST IN TECHNOLOGIES



GREATEST CHALLENGES



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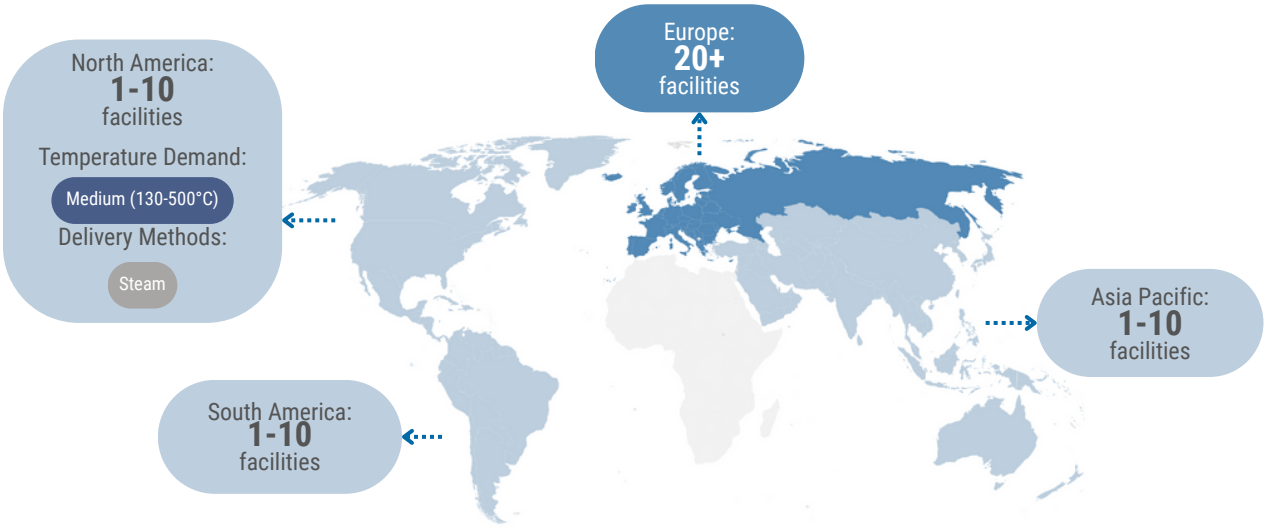


RENEWABLE® THERMAL COLLABORATIVE

SUMMIT 2025

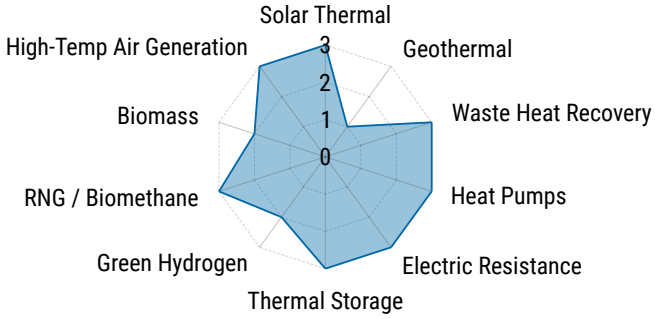
VIVEK NESARIKAR

Director - Group Engineering Center

Unilever

vivek.nesarikar@unilever.com

INTEREST IN TECHNOLOGIES



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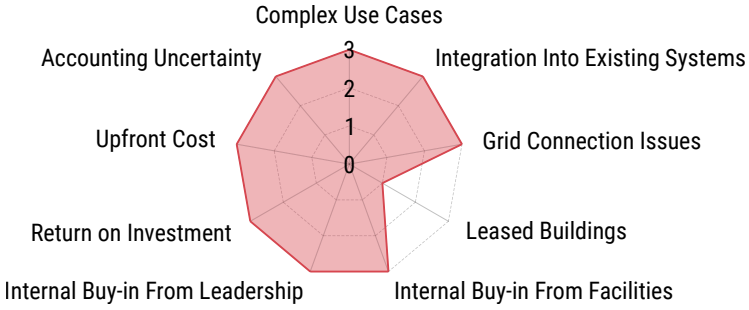

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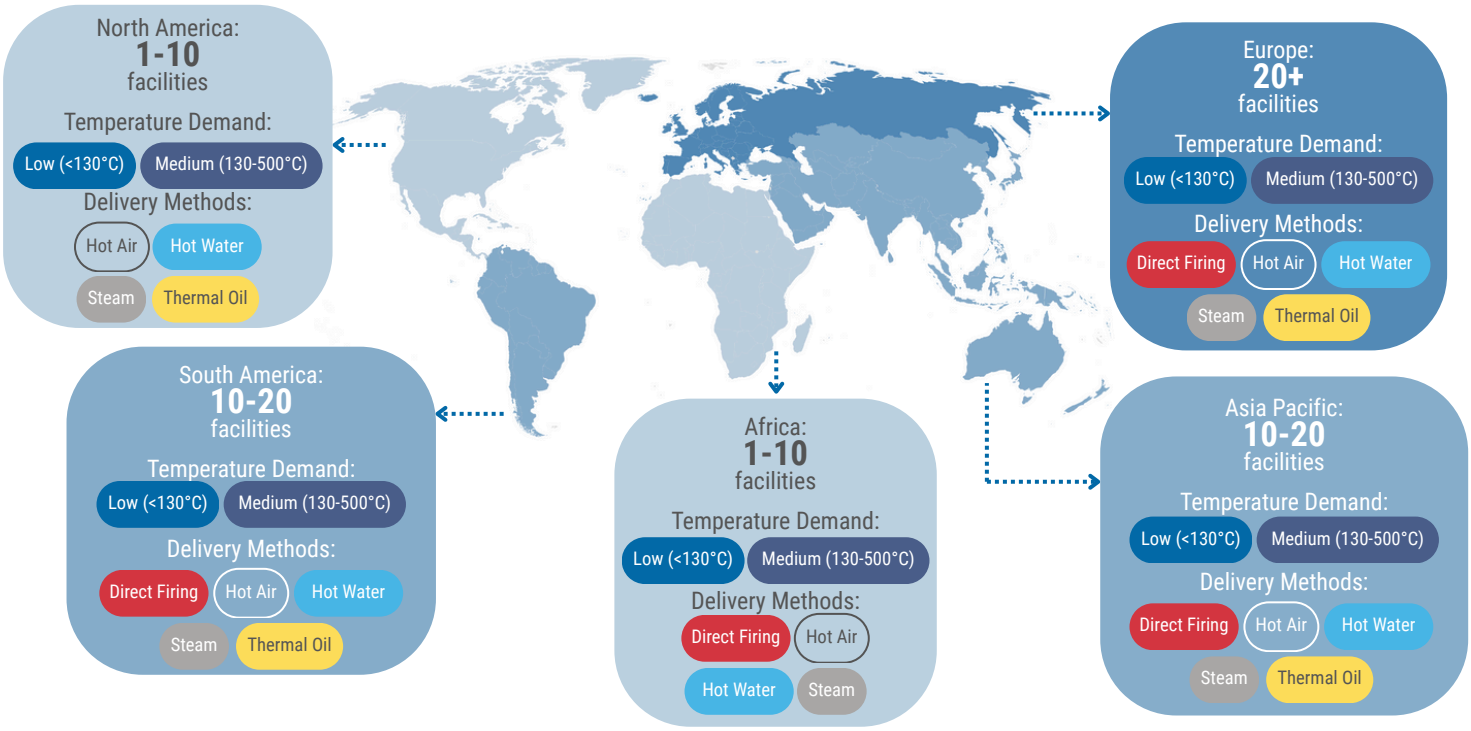


RENEWABLE® THERMAL COLLABORATIVE

SUMMIT 2025

DO NOT SHARE: Information intended for survey respondents only.

LEWIS RAE

Scope 1 & 2 Decarbonisation Programme Lead

Unilever

lewis.rae@unilever.com

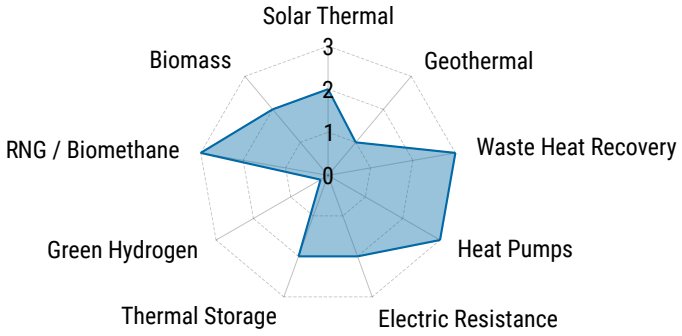
TEMPERATURE DEMAND

Low (<130°C) | Medium (130-500°C)

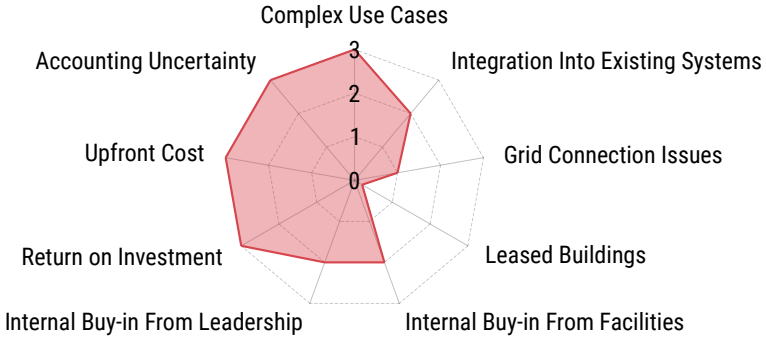
HEAT DELIVERY METHODS

Direct Firing | Hot Air | Hot Water | Steam | Thermal Oil

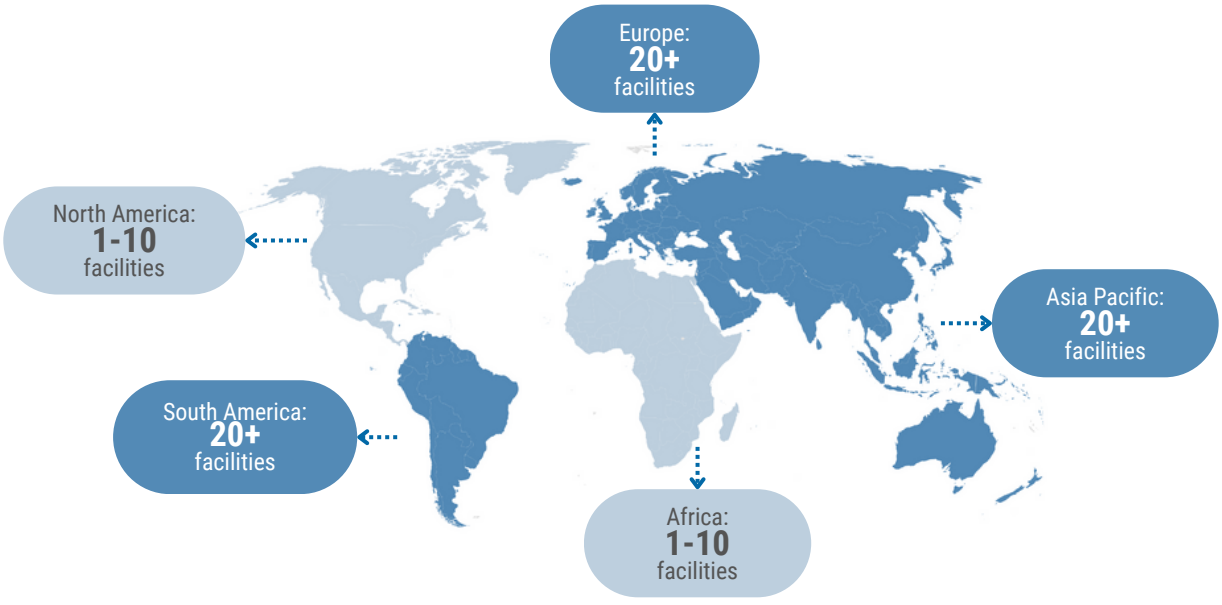
INTEREST IN TECHNOLOGIES



GREATEST CHALLENGES



FACILITIES FOOTPRINT



RENEWABLE® THERMAL COLLABORATIVE

SUMMIT 2025

COLGATE-PALMOLIVE

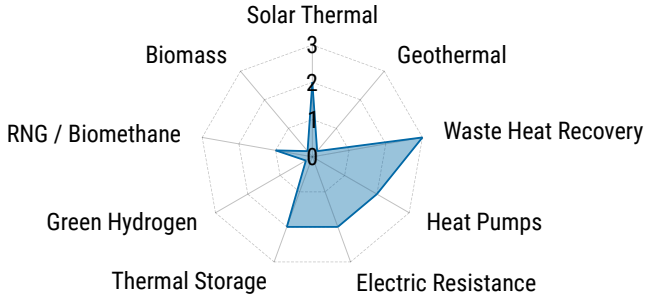
GURPREET SINGH

Director Global Utilities, Sustainability and Innovation

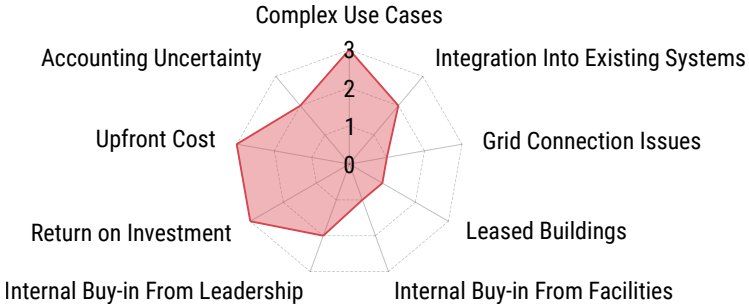
Colgate-Palmolive

gurpreet_singh@colpal.com

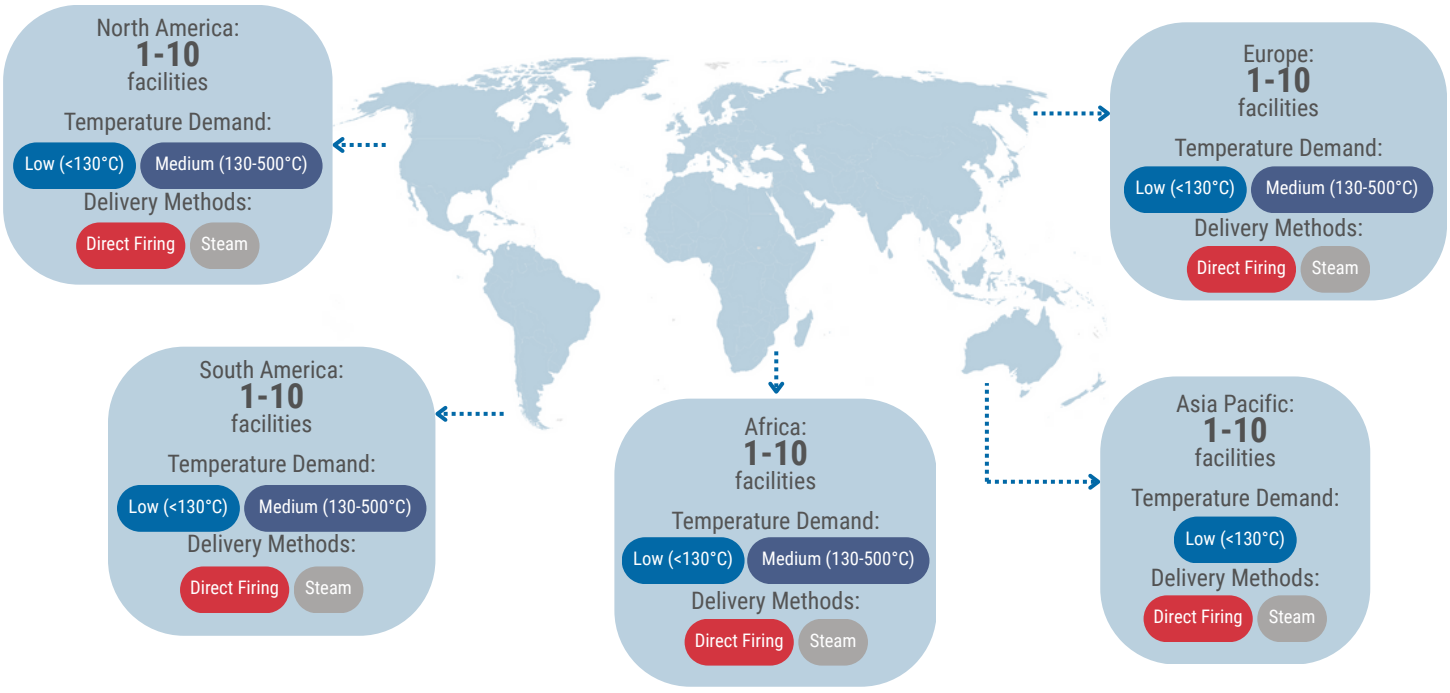
INTEREST IN TECHNOLOGIES



GREATEST CHALLENGES



FACILITIES FOOTPRINT



RENEWABLE® THERMAL COLLABORATIVE

SUMMIT 2025

STEVE SKARDA

Climate & Water Technical Innovation Senior Director

Procter & Gamble

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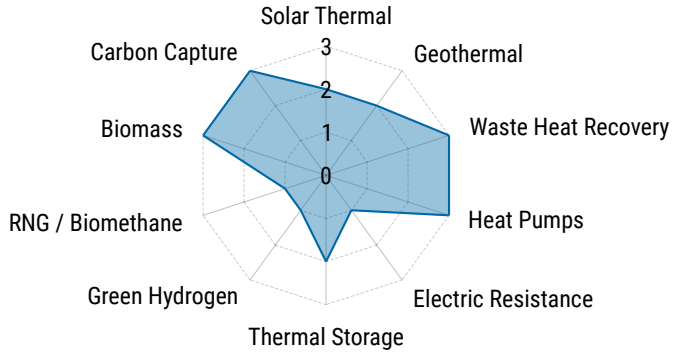
TEMPERATURE DEMAND

Low (<130°C) | Medium (130-500°C)

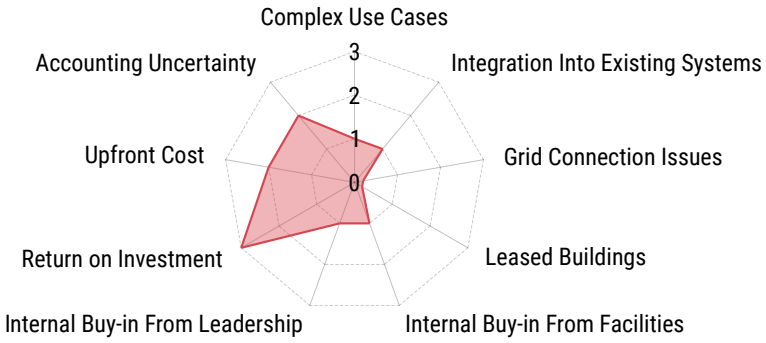
HEAT DELIVERY METHODS

Hot Air | Hot Water | Steam | Thermal Oil | CHP

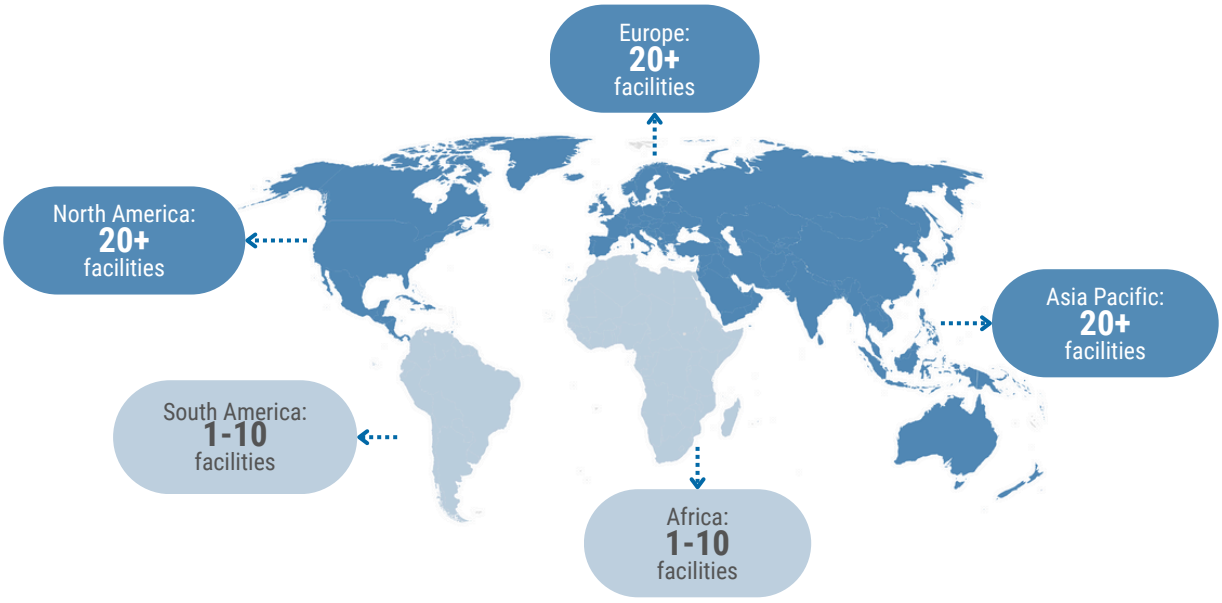
INTEREST IN TECHNOLOGIES



GREATEST CHALLENGES



FACILITIES FOOTPRINT



RENEWABLE® THERMAL COLLABORATIVE

SUMMIT 2025

JULIAN STOCK

Sr Innovation Engineer

Ball Corporation

jstock@ball.com

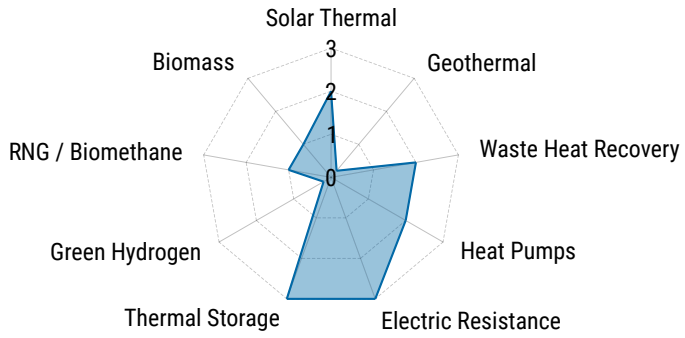
TEMPERATURE DEMAND

Medium (130-500°C)

HEAT DELIVERY METHODS

Hot Air | Hot Water

INTEREST IN TECHNOLOGIES



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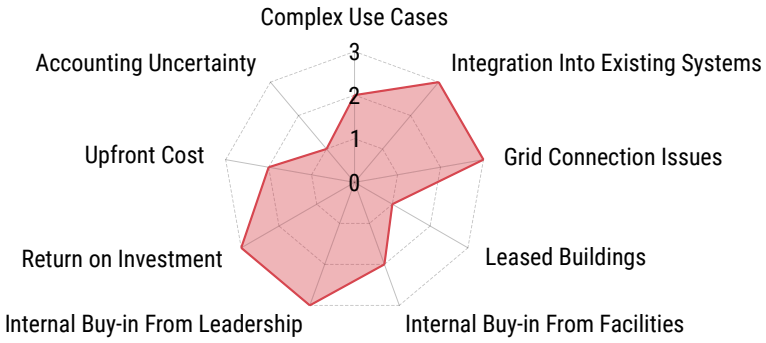

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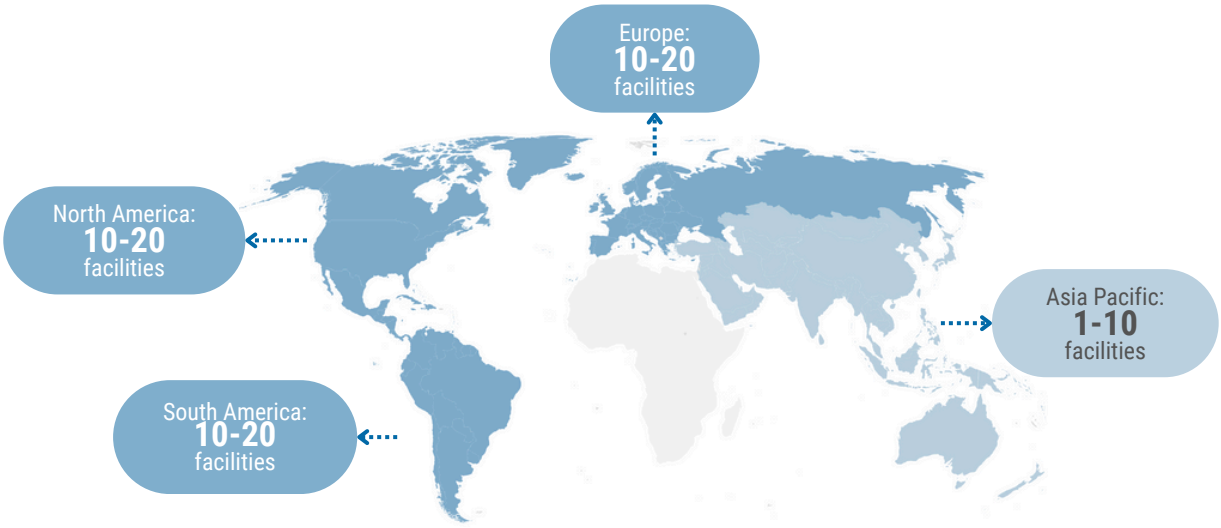

RENEWABLE® THERMAL COLLABORATIVE

SUMMIT 2025

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SAINT-GOBAIN

BLAIR STURM

Sr. Manager, Process Sustainability & Energy

Saint-Gobain NA

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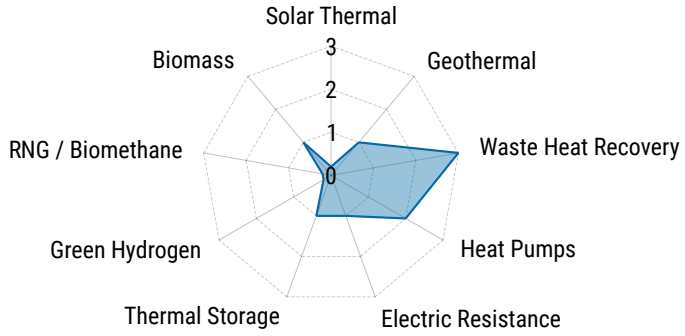
TEMPERATURE DEMAND

Low (<130°C) | Medium (130-500°C) | High (500-1000°C)

HEAT DELIVERY METHODS

Direct Firing | Hot Water | Steam | Thermal Oil

INTEREST IN TECHNOLOGIES



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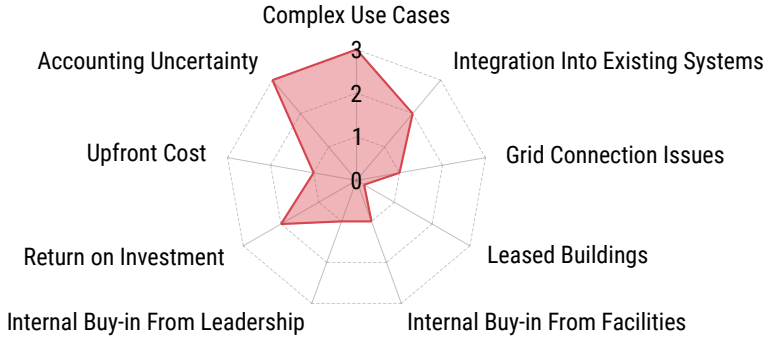

FACILITIES FOOTPRINT