



NNWI



CONFERENCE

Powering Industrial Decarbonisation: SMRs for Materials Processing Industries

14 MAY 2026 | LONDON, UK



PANEL 2

Decarbonisation Strategies and Industrial Applications

Chaired by Shiva Sundaram, Commercial Director, Materials Processing Institute

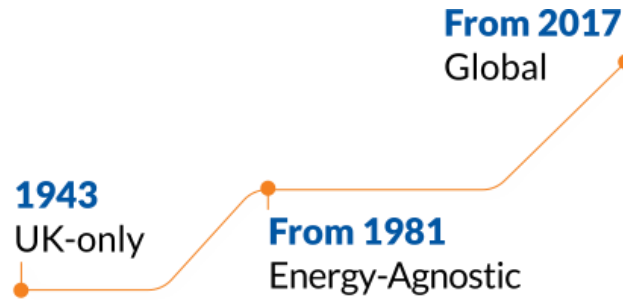
- Stuart Broadley, Chief Executive Officer, **Energy Industries Council (EIC)**
- Will Pearson, Nuclear Commercial Director, **Tarmac**
- Dr Edwin Basson, Director General, **World Steel Association**



THE VOICE OF THE ENERGY
SUPPLY CHAIN, **GLOBALLY**
EXPORT | DIVERSIFY | GROW



Top 5 membership globally
950 members → Voice of the Energy Supply Chain



Energy supply chain focus
UK → Global → 5 hubs 1995 → 6th hub ConE 2025



CAPEX Project tracking
>17,000 projects (~\$17 trillion) - Global



OPEX / O&M / Decom
Mapping >47,000 assets - Global



Energy Supply Chain Capabilities
>10,000 companies with contacts
(Europe, Americas, Middle East, ASEAN)

Pavilions & Business Lounges



160 events p.a.
Energy Exports Conference (EEC)
Bankable Energies
World Energy Supply Chain Awards (WESCA)



Decarbonisation of Tarmac Materials Capability





A unique national capacity & capability

6,000
people

150
operations

No.1 supplier
construction solutions

£2.5bn
turnover

2500 FLEET VEHICLES | **30** TRAINS | **133** QUARRIES | **51** RAP/RECYCLING PLANTS | **3** CEMENT PLANTS | **4** DREDGERS
39 BUILDING PRODUCT SITES | **65** ASPHALT PLANTS | **10** WHARVES | **106** RMX PLANTS | **17** CONTRACTING DEPOTS



Today our construction evolution of materials is progressing at pace.

All aspects of manufacture, material and multi-modal logistics are advancing to meet the challenges of environment, population and infrastructure maintenance or investment.

CEVO

Construction evolution

Technology

Online calculators, instant access AI predictive data and carbon reporting.

Logistics & Manufacture

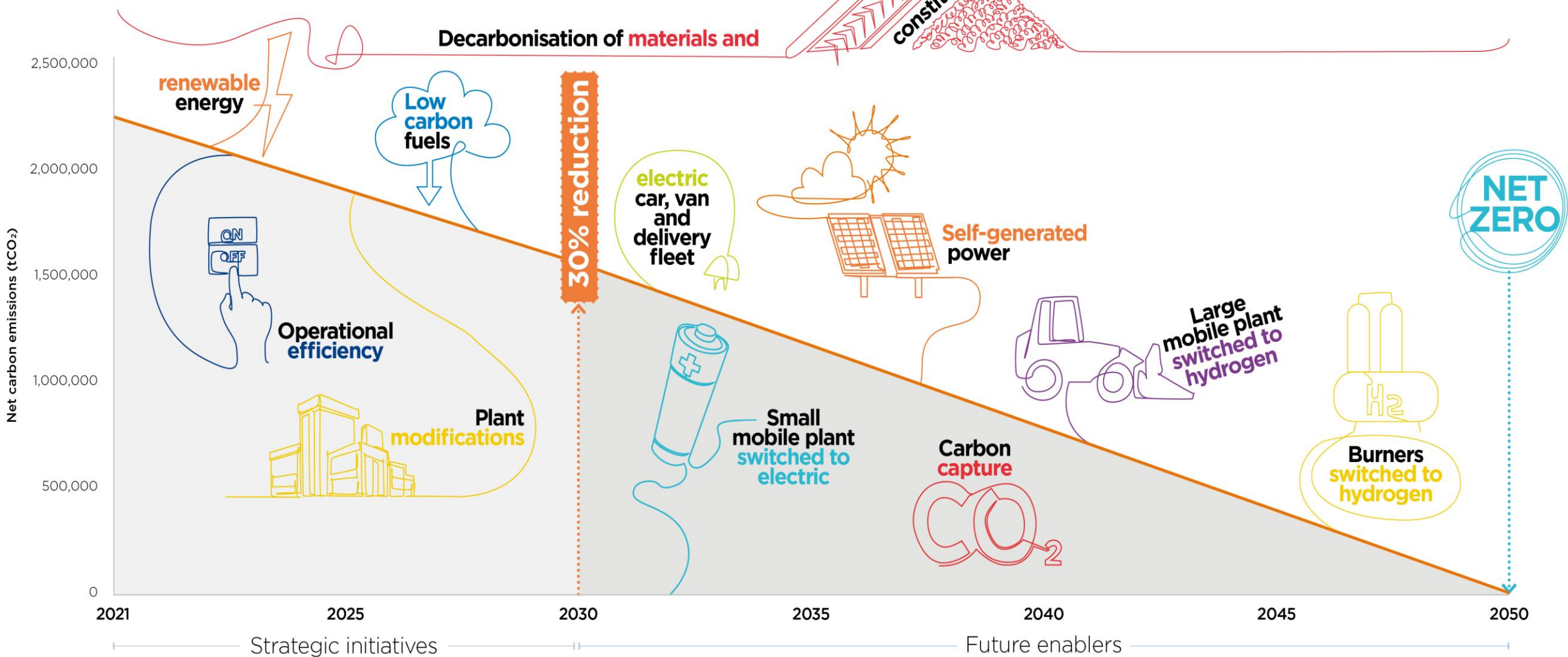
Multi-modal integrations, EV Fleet and alternative fuel optimisation.

PAVE

Expertise and technology that enables customer choice in the delivery of lower carbon outcomes to road surfacing and maintenance.



Our Net Zero Roadmap





TARMAC

A CRH COMPANY



The Global Steel Industry

- *Decarbonisation strategies*

Edwin Basson

World Steel Association

14 May 2026

Antitrust

As worldsteel meetings are also meetings of competitors, antitrust and competition law concerns are paramount and certain areas of discussions must be totally avoided:

- No discussions on current or future pricing, pricing terms or any component of price
- No discussions on current or future production output or current or future capacity or capacity utilisation involving non-public information, or desired capacity or production output or capacity utilisation levels, or coordinated capacity, capacity utilisation or production output increases or decreases
- No discussions on allocating geographical or product markets or customers or classes of customers
- No discussions on concerted actions involving costs (including concerted actions against suppliers)
- No discussions on future raw material prices, price terms or negotiating strategies
- No discussions regarding how to respond to price increases or other charges from suppliers or whether or how to pass on any costs to customers
- No discussion on contemplated trade actions or complaints about trade flows
- No discussion on non-public company-specific forward looking commercial strategies or plans

Visit [worldsteel.org/About us](http://worldsteel.org/About-us) for detailed antitrust guidelines.



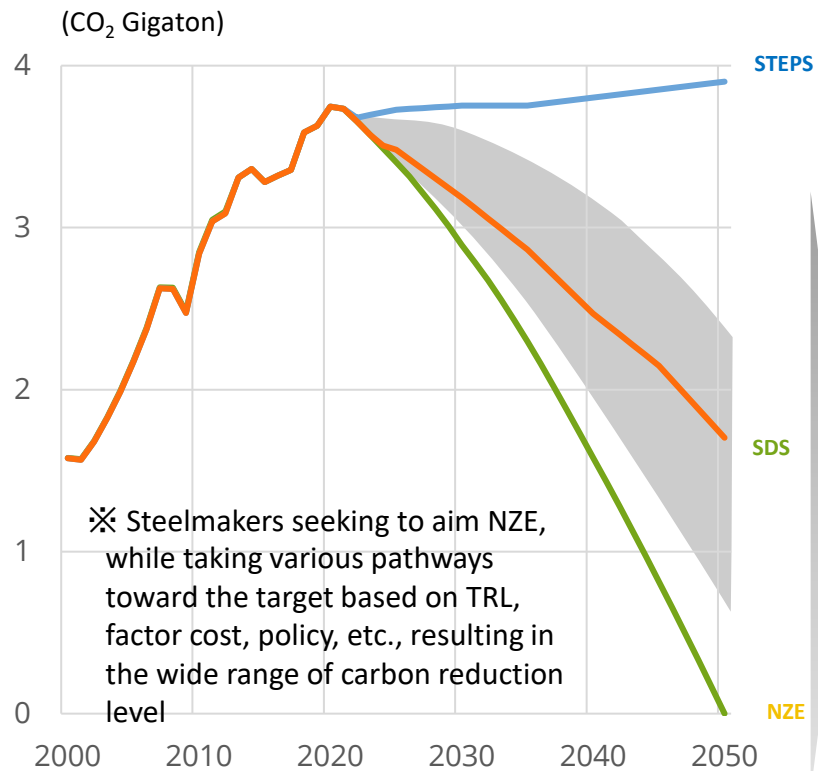
Contents

- Decarbonisation and energy

Climate change brings about changes to all sectors such as economy, society, politics, and technology

❖ Global net zero initiatives change not only economic and industrial structure, but also global technological standards and geopolitical hegemony

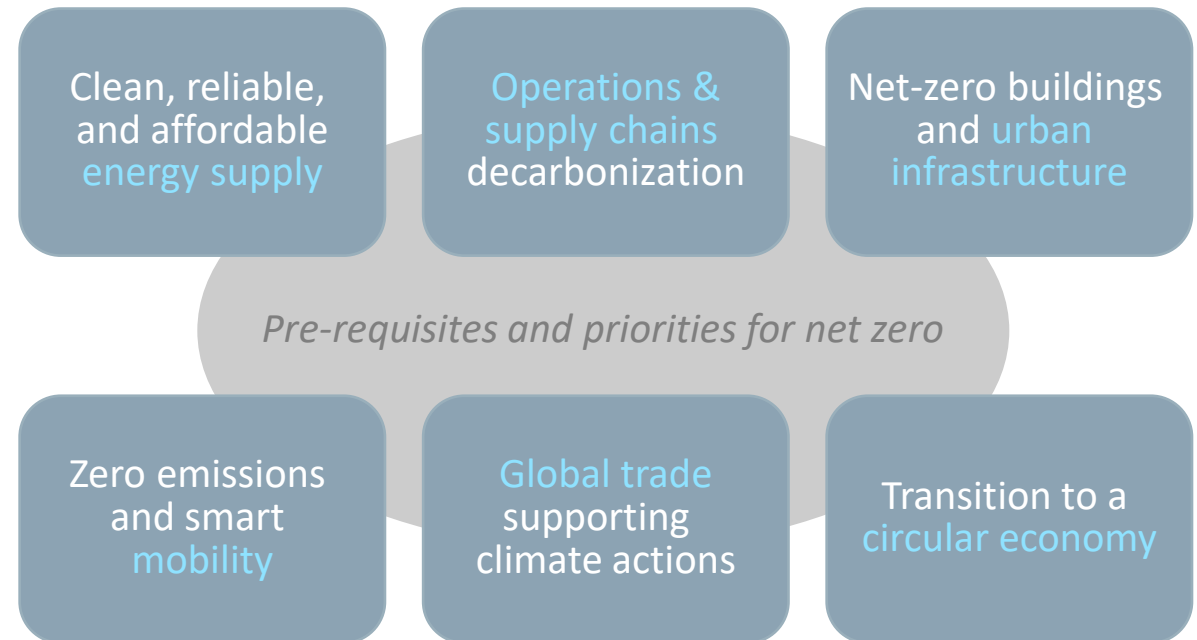
[Carbon reduction scenarios for global steel industry]



❖ Source : IEA(2020), POSRI

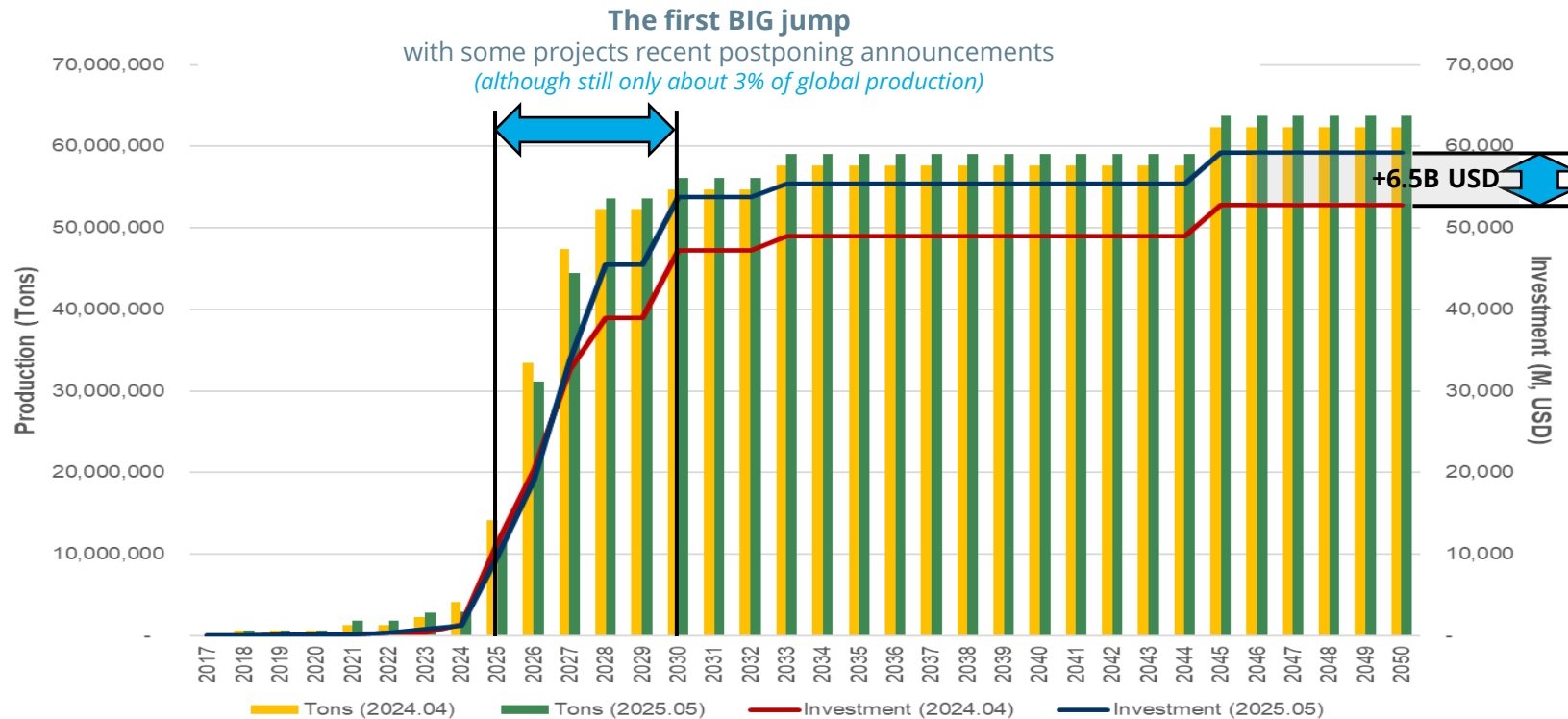
Is Net-Zero Really Possible?

International society's net zero momentum by 2030 and clean energy infrastructure investment will determine success of net zero emissions by 2050



Industry's decarbonisation efforts still growing

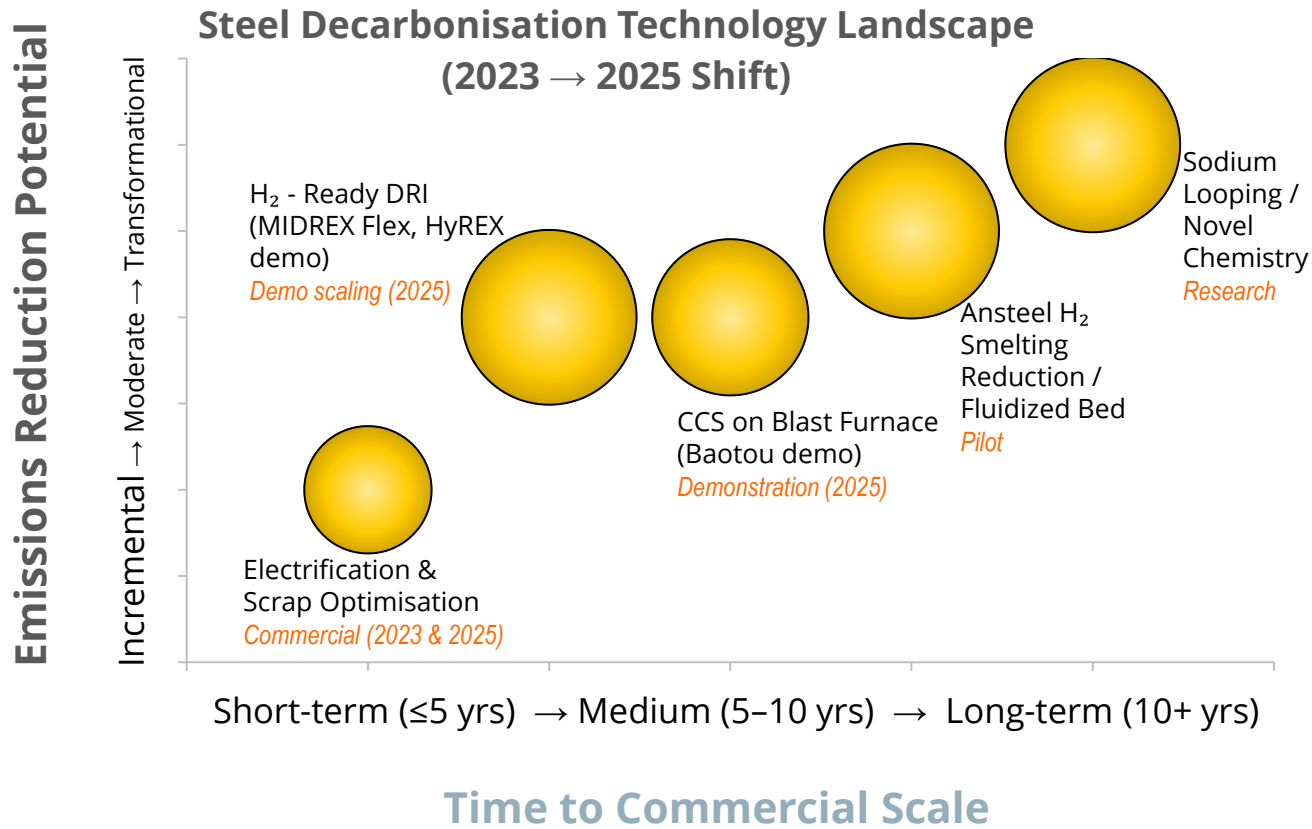
Green steel tracker forecast, in annual tCS (cap)



Source : LeadIT's Green Steel Tracker (2025), active projects only

Even with some delays announced, +1.4M tons and +6.5B USD added compared to 2024

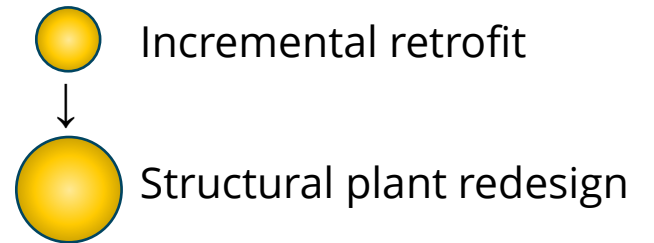
Portfolio Maturity Map



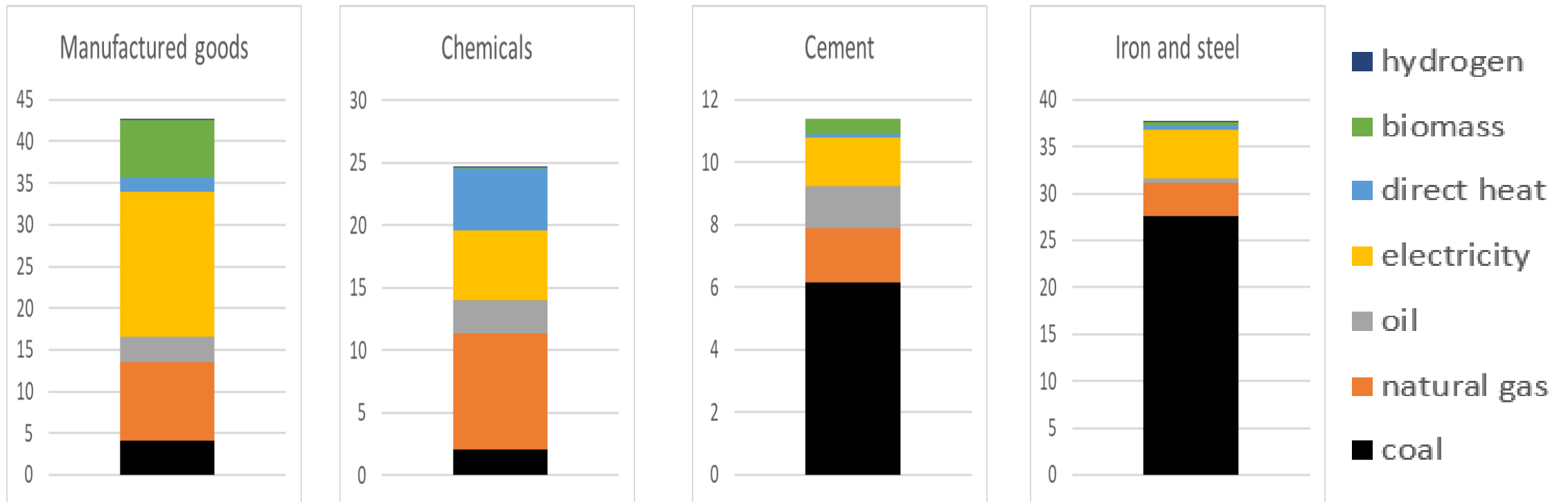
Observations

- 2023 = Technology validation
- 2025 = Scaling pathways emerging
- 2030 constraint = Energy + infrastructure, **NOT TECHNOLOGY**

Legend:



Energy mix for industrial sectors

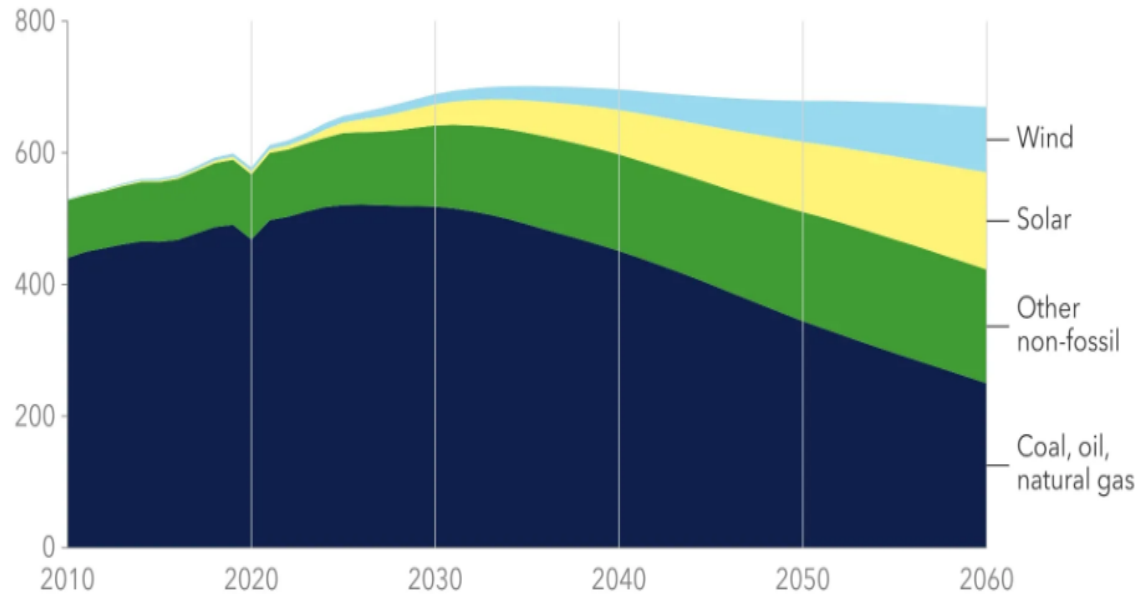


Source: DNV Energy Transition Outlook 2025. Estimates for the year 2024. Units EJ.

DNV estimates do not include fossil fuel use as feedstock

Primary energy supply to level off from the 2030s, while non-fossil steadily displaces fossil energy in primary energy mix...

World primary energy supply (EJ/yr)
DNV Energy Transition Outlook 2025



Source: DNV Energy Transition Outlook 2025

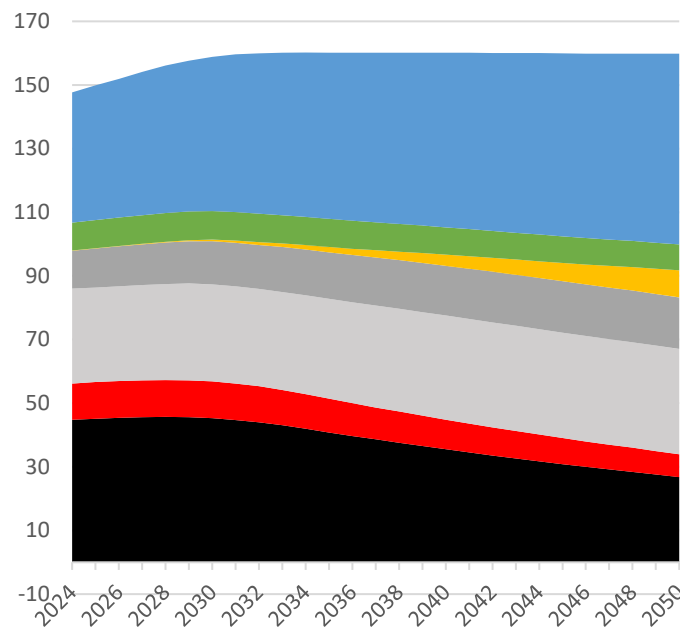
	2024	2030	2040	2050	2060
Wind	9	15	31	62	99
Solar	13	32	68	107	148
Nuclear	29	37	48	59	75
Other non-fossil	77	87	98	107	98
Nat Gas	169	183	190	164	131
Oil	177	179	154	118	86
Coal	171	157	106	62	32
Share non-fossil	20%	25%	35%	49%	63%

*Other non-fossil includes bioenergy, geothermal and hydropower

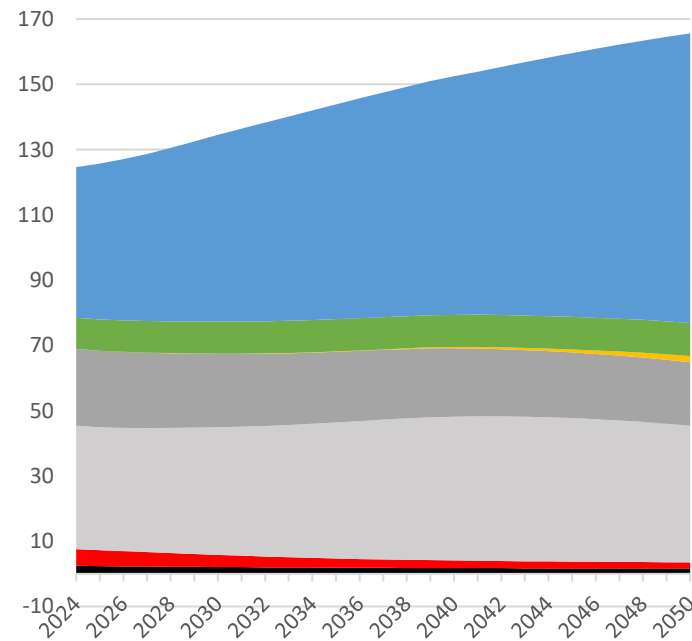
...the fossil share to represent about 50% of total energy mix in mid-century

By 2050 the share of fossil fuels in total energy demand will fall to 65% only for **transportation**, 27% for **buildings**, and 42% for **industry**

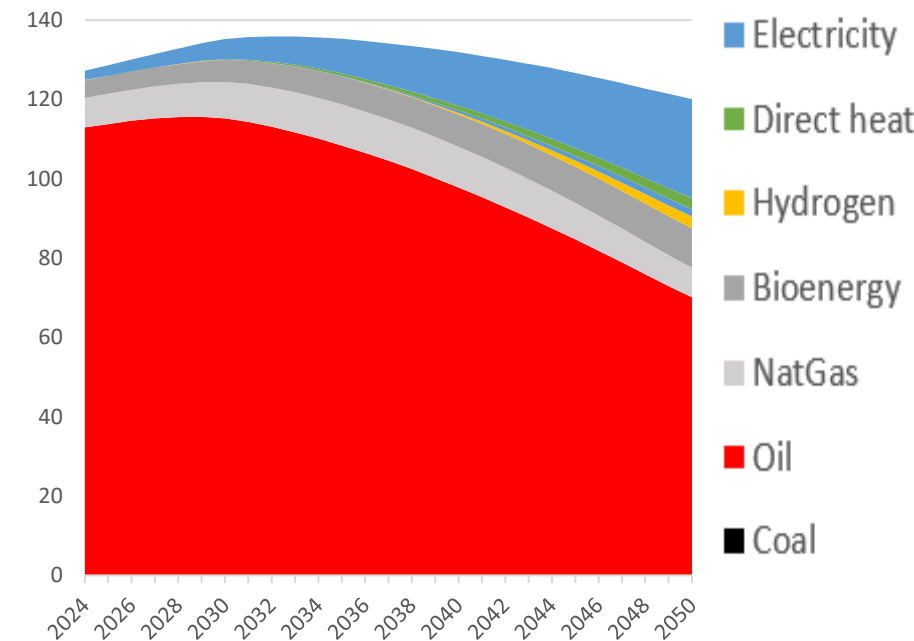
Industry sector's energy demand by carrier



Buildings sector's energy demand by carrier



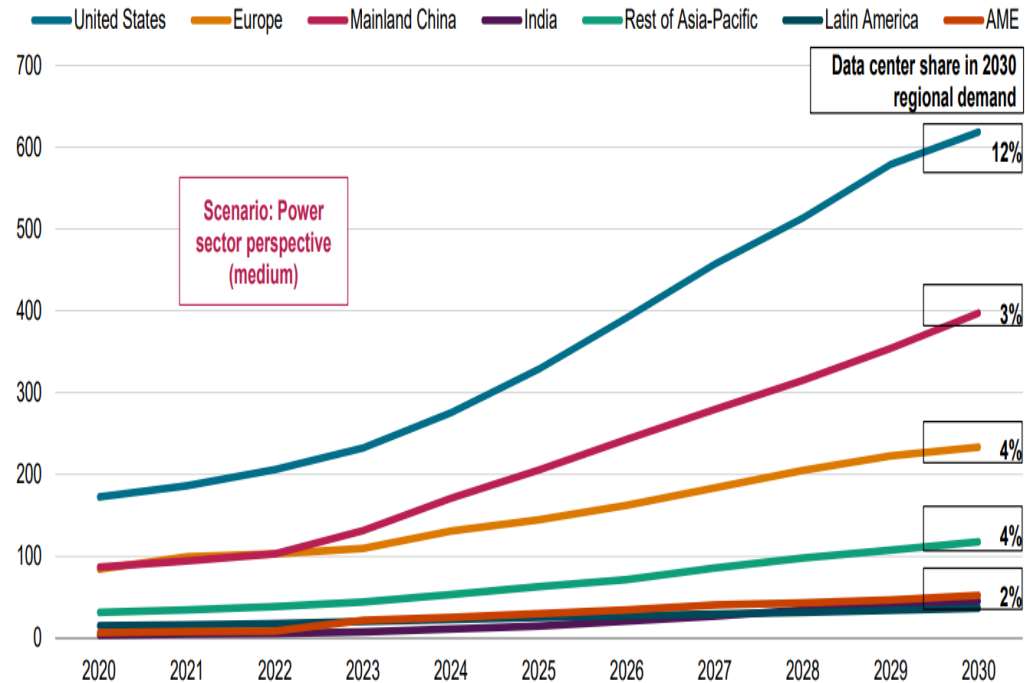
Transportation sector's energy demand by carrier



Source: DNV Energy Transition Outlook 2025

Data centres lead the way, effectively becoming “the new heavy industry” in terms of power demand

Global data center power demand, by region (TWh)



Data centre strategies to secure reliable low carbon energy and bypass the rising system integration costs and price volatility

- The "Nuclear Pivot" (SMRs, PPAs & Life Extensions)
- Onsite Microgrids & "Behind-the-Meter" Generation
- Moving beyond "annual net-zero" to hourly matching

Sources: S&P Global Energy; "5 trends in 2026 for global power and renewables markets".

worldsteel

A S S O C I A T I O N

worldsteel.org | constructsteel.org | steeluniversity.org | worldautosteel.org | worldstainless.org





Q&A Discussion

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