



The ESCO Regulatory Innovation panel

DISCOVER



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Energy Efficiency is a key topic for the next decade in Europe and all sectors must take action



-12%

Final energy consumption in Europe in 2030 vs. 2020, EU EE directive



~50%

of all cumulative CO₂ emissions reductions expected to come from energy efficiency until 2030¹



25-50%

Typical annual energy savings of an Energy Efficiency project



x2

Yearly energy efficiency gain, expected to double by 2030

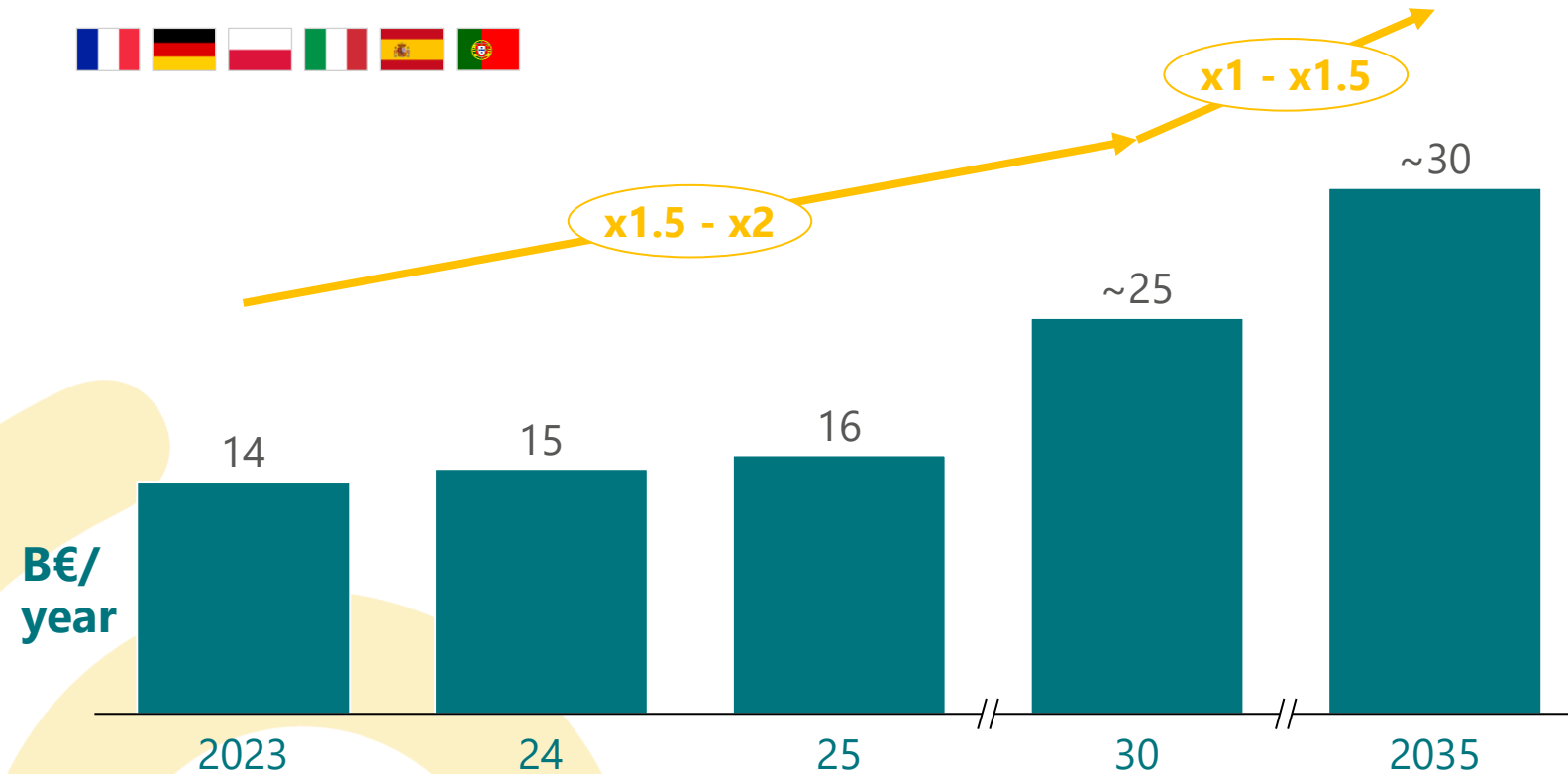
CLIENT KEY DRIVERS

- Volatility of energy prices
- Energy cost savings
- ESG concerns
- **Acceleration of equipment replacement rate** (e.g., electrification such as heat pumps replacing old boilers)
- **EU Energy Efficiency directive**, providing final energy consumption reduction targets by 2030
- **Sector or equipment specific regulations** (e.g., EU Energy Perf. of Buildings Directive, F-Gas regulation)

European Energy Efficiency market expected to almost double by 2030

Energy Efficiency market size (Capex), B€/year

Zoom on France, Germany, Spain, Italy, Portugal and Poland



1.5-2x in 2023-30 expected EE market growth

1-1.5x in 2030-35 EE market growth expected to plateau by 2035 (5 years delay after EE directive deadline)

Customers' pain points are justifying the need for intermediary players like ESCOS – surveyed customers

Administrative complexity

Identifying financial assistance mechanisms and carrying out necessary administrative procedures

“ *Bureaucracy is a main constraint in some companies and avoid Capex approval will help to smooth the process*

- Head of BU in a logistics company

Regulatory vagueness

Defining binding laws with strong penalties to enforce regulations

“ *Navigating the regulatory complexity to comply with the tertiary decree poses a significant challenge, particularly regarding completing the declaration, which proves intricate for non-specialized firms.*

- Head of asset management for a private healthcare facilities company

Complex ESG roadmaps

Being able to deploy ESG roadmap from headquarters or from large corporate who impose Scope 2/3 decarbonation with limited support

“ *Often Capex budgeting is not aligned with ESG and emission reduction goals, hence, I consider external financing useful*

- Asset manager of an office buildings company

Financing hurdle

Financing end-users' Capex costs

“ *I prefer to focus financial resources on core business, Hence it would be useful to resort to third party financing for Energy efficiency*

- CEO at a chemical company

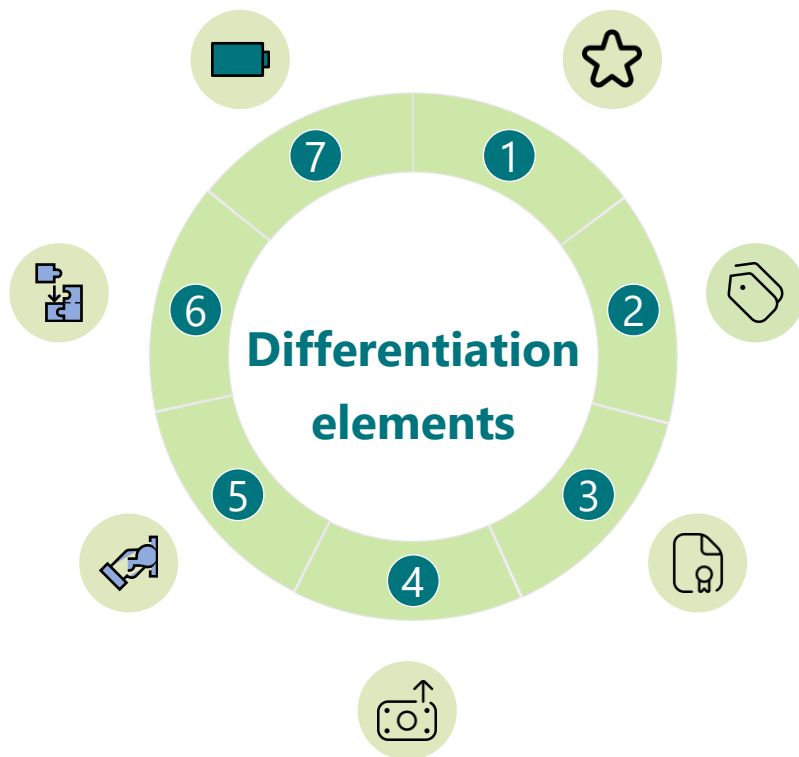
Lack of internal EE resources

Dedicating internal resources to manage EE project and be able to chose what needs to be upgraded/ retrofit and how

“ *We do not have sufficient internal resources in number of FTE and capabilities to conduct the whole project*

- Head of BU in a hospital

What clients are looking for when contracting with an ESCO



Differentiation elements

What clients value most - survey

1	Technical expertise and experience	36%
2	Attractive NPV/cost	23%
3	Contract simplicity and modularity	16%
4	Scalability	15%
5	Third party financing	6%
6	Integrator	4%
7	Decarbonization and energy platform	n.a.

CLIENT CASE

#SHIFT EFFICIENCY



VERTICAL MARKET: XX | FOOD INDUSTRY | PACKAGED AND PROCESSED MEAT PRODUCTS

TYPE OF CONTRACT: EEA | INDUSTRIAL REFRIGERATION – HEAT RECOVERY - COMPRESSED AIR

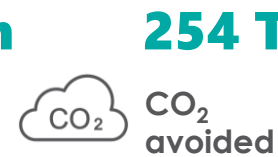
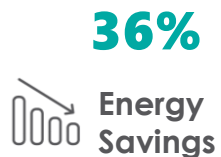
NUMBER OF SITES: 1

CONTRACT LENGTH: 8 years

PROJECT CONTEXT

A 100 years old portuguese company in the animal and plant-based protein industry. its activity covers the whole value chain from cattle breeding to market distribution, going through slaughtering, cutting and packaging. GreenYellow designed a tailor-made energy efficiency solution that embraces multiple systems of the client, supporting its targets of decarbonization. the natural gas supply of the plant will be terminated thanks to the total electrification of the site implemented by GreenYellow.

KEY FIGURES



Carbon emissions avoided equivalent to **1,270 trees** planted

CHALLENGES

- Implement solution without impacting operation of the factory
- Improving overall efficiency of the plant
- Support companies committed to changing their practices

SOLUTIONS

- Total replacement of refrigeration plants with implementation new equipment operating with natural fluids
- New Heat recovery implementation connected to refrigeration system
- Full automation and control
- Total replacement of compressed air system
- Vacuum pumps optimization

BENEFITS

- Guaranteed availability and performance throughout the contract
- **205 k€ saved** per year
- Improved **operational reliability and safety** with new equipment
- **Brand new systems** of refrigeration, heat recovery and compressed air with **top tier equipment**

CLIENT CASES EUROPE



LINEA ALIMENTARIA | SPAIN

Cooling solutions
17% energy savings
8-year contract |
50 tons of CO₂ avoided

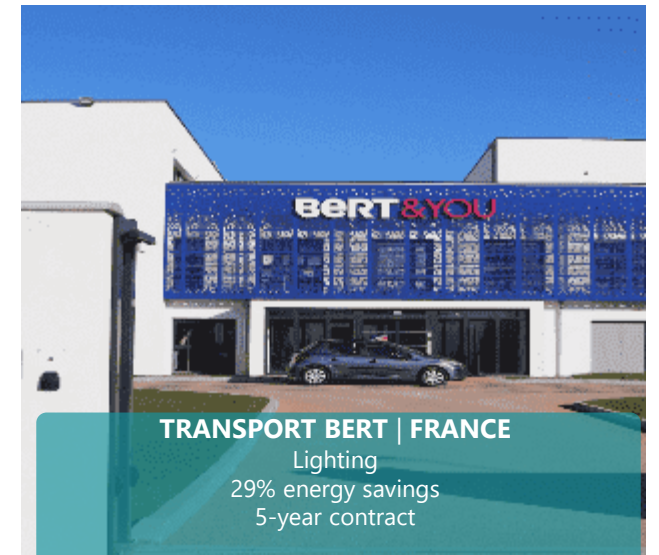
FOOD INDUSTRY



BISCUITS BOUVARD | FRANCE

Cooling solutions
83% energy savings
6.3 GWh annual savings
6-year contract | 81 tons of CO₂ avoided

FOOD INDUSTRY



TRANSPORT BERT | FRANCE

Lighting
29% energy savings
5-year contract

LOGISTICS



VALEO | FRANCE

Lighting
63% energy savings
10-year contract |
74 tons of CO₂ avoided

INDUSTRY



FORVIA | SPAIN

Heating and cooling solutions
23% energy savings
10-year contract |
168 tons of CO₂ avoided

INDUSTRY



MAX PLUS | FRANCE

Lighting
68% energy savings
8-year contract

RETAIL



Committed accelerator to the **e**nergy transition**n**



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