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Advising Greentech companies to help maximize growth

AI is a Power Hog: So What?

I've done a number of posts related to how power-hungry AI could dramatically increase load demand and alter the utility landscape.

But that's only one side of the story.

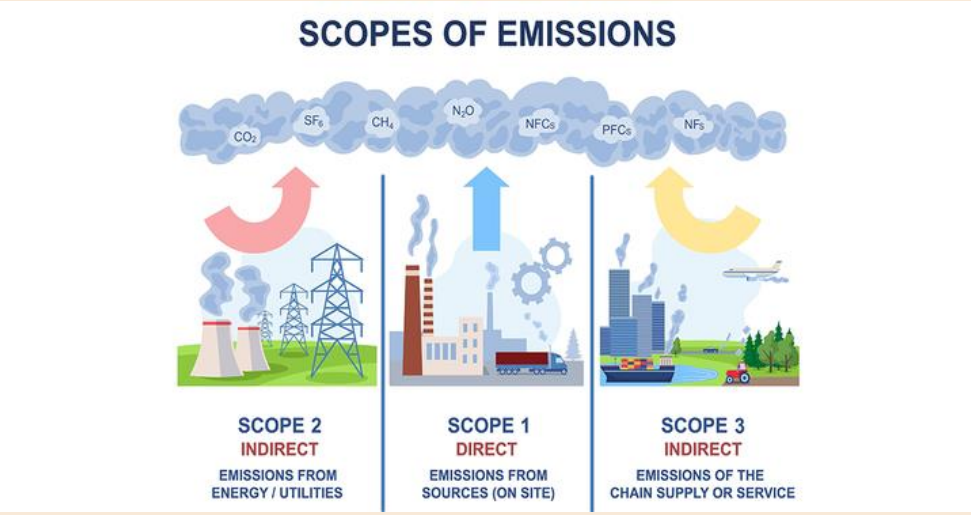
Perfect solutions don't exist

- The forecast for AI technology's power consumption is daunting. If not properly managed, it could disrupt utilities and/or increase emissions.
- But the countless ways that the technology can benefit the environment will far outweigh any negatives.
- AI should be viewed in the same light as any climate technology:
  - For example: EVs and battery storage require lithium which is quite environmentally unfriendly to mine. Does that mean we shouldn't transition to EVs or deploy battery storage?

What are some potential benefits?

See Next Slide

Phillips improves it supply chain



Scope 3 emissions are indirect greenhouse gas emissions that occur from activities that a company is indirectly responsible for, but does not own or control.

- As part of its Scope 3 reduction strategy, healthcare tech company Phillips employs AI to help prioritize its supply chain.
- AI efficiently analyzes thousands of data points to screen for emission factors and risks.
- Accurately assessing Scope 3 is a data gathering and analysis nightmare that could add significant costs to products.
- AI can alleviate most, if not all those additional costs, and provide more accurate results.

Tesla uses AI enabled Climate TRACE

Climate TRACE uses satellites, other remote sensing techniques, and artificial intelligence to develop a detailed look at global emissions.

- Climate TRACE's inventory encompasses more than 352 million sources.
- This includes power plants, steel mills, ships, oil refineries, fertilizer applications, deforestation and wildfires.
- Tesla uses the data to switch supplier locations by region based on energy consumption.

The common thread in all these applications is in automating the decision-making process based on more complete and accurate data.

That's the promise of artificial intelligence.
(When properly deployed)

L'Oreal minimizes raw materials emissions

- The research and innovation arm of L'Oreal analyzes emissions related to the raw materials used in its fragrance and personal care products by leveraging experts, databases, and artificial intelligence.
- Given the company sources more than 2,000 raw materials from 300 botanical sources, without AI, this a challenging and less accurate task.
- AI allows L'Oreal to continuously screen for water stress, biodiversity impacts, agricultural practices, and other climate-related metrics.

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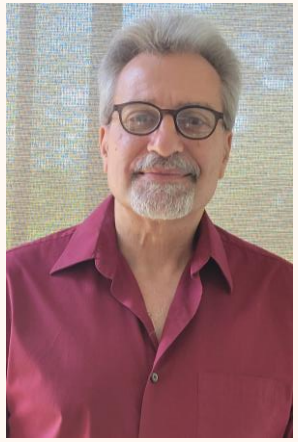

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Unbiased and Unfiltered

- An honest assessment of the climate change effort.
- I cover what's working – but more important - the issues/roadblocks that the industry would prefer to ignore.
- A must-read for anyone with a desire to understand what's really going on with renewable energy and climate change.

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