Climate Action in Practice: Actionable Insights to Increase Low Carbon Energy & Transport

April 2025





Towards Net Zero







FORUM Towards Net Zero

The Consumer Goods Forum's <u>Towards Net Zero</u> <u>Coalition</u> has developed a new resource to help retailers and manufacturers turn climate ambition into action

This collection is organized into six focused packets, each addressing a specific challenge identified by our members. Every publication offers practical guidance, real-world examples, and actionable insights to accelerate progress toward a more sustainable future

Designed for companies at any stage of their climate journey, this guide provides the knowledge and support needed to drive meaningful change



For each key challenge, this publication

provides the following resources:

Where to start | Six key challenges, one common framework

Six key challenges identified by our members:



This documents highlights one are of focus. Refer to the full Action in Practice Guide for a comprehensive view across all six challenges



Where to start | High-level impact and feasibility estimates can guide prioritization¹

l	Impact ——		Scope for action			
Action area	Emissions reduction	Co-benefits (business, social, environmental)	Affordability	implementatio n	Public sector support	Degree of control
Reduce deforestation	High	High	Medium	Low	High	Medium
Enhance sustainable agriculture	High	High	Low	Medium	Medium	Medium
Merchandise sustainable products	High	High	Medium	Medium	Low	High
Reduce food loss	High	High	Low	Medium	Low	Medium
and food waste	Medium	Medium	High	High	High	Medium
Increase low-carbon energy	Low	Medium	Medium	High	Medium	High
and low-carbon transportation	Medium	Low	Low	Medium	High	High
Adopt circular or sustainable packaging	Low	Medium	Medium	Medium	High	Medium

1. The impact and feasibility estimates provided are relative assessments that evaluate each action area in comparison to the other areas in these materials. The ratings are based on high-level assessments of each action area as a whole and are not necessarily representative of each individual activity within a given area

Increase low carbon energy

Shared Vision of The Future:

Retailer operations and their supply chains have optimized energy efficiency, and renewable sources are used for all energy needs

Return to key challenges





Climate Action in Practice Guide | Preview of increasing low carbon energy insights, resources, and activities to consider



Relative Impact & Feasibility



Retailer Case Studies



"Best Source of Truth" Resources





Overview | What to know about energy efficiency & renewables

Strategic Context



Increasing energy efficiency and adopting renewable energy sources are often **relatively low-cost sustainability levers**, enabling retailers to reduce emissions in their own operations and influence major suppliers as part of scope 3 strategy



Enhancing energy efficiency in own operations **improves sustainability** and **delivers significant cost savings**¹, making it a critical strategy for expense reduction

Key Challenges



Executing renewables projects can be operationally complex, often requiring coordination across multiple sites and involving numerous partners (e.g., project developers, energy brokers)



Deploying renewables faces near-term pricing challenges in the U.S., due to transmission & supply chain issue – requiring strategic planning despite favorable long-term trends

Opportunity & Solutions



Leveraging policy incentives (e.g., US IRA tax credits, EU CBAM) is accelerating energy efficiency and renewable adoption, offering strong incentives to act



Not exhaustive

Latin America | Selective investment Policies towards energy efficiency and on-site renewable generation vary widely; retailers should seek alignment between supportive policies and local needs² - *e.g.*, *Chile*, Uruguay





Europe | Mandates and beneficial economics

US & Canada | Tailored initiatives

Beyond compliance with strong efficiency and emissions standards, retailers can improve their economics by offsetting relatively high energy costs³ - *EU*

Retailers should align energy efforts with location-specific blend of federal, state

and local policies, regulations and incentives to maximize benefits¹- US

Asia | Government-led renewable initiatives

Ambitious government targets for renewable energy adoption present opportunities for retailers to invest in renewables, benefiting from incentives⁴ - *India, China*

Africa | Solar potential, onsite and beyond

High solar potential offers retailers the opportunity to power operations sustainably and reduce dependence on unreliable grids⁵ - *e.g., Kenya, South Africa*

Oceania | Renewable alignment

Australia and New Zealand plan rapid transitions to renewables-based power generation; retailers seeking to source green energy align with policy goals⁶ – *Australia, New Zealand*

Sources: 1. American Council for an Energy-Efficient Economy (ACEEE), "State Energy Efficiency Scorecard," 2022; 2. International Renewable Energy Agency (IRENA), "Regional Action Plan: Accelerating Renewable Energy Deployment in Latin America," 2019; 3. European Commission, "Energy Efficiency Directive," 2023; 4. IEA, "India's Clean Energy Transition is Rapidly Underway", 2022; 5. World Economic Forum, "Africa is Leading the Way in Solar Power Potential", 2022; 6. IEA, "New Zealand 2023: Executive Summary", 2023

Regional considerations





Actions (Efficiency) | Retailers should assess energy use baseline and create regional- or facility-level structures to scale energy efficiency

Early action should focus on establishing energy use baseline and identifying key benchmarks

Example activities include

- Assess and understand energy use and footprint starting point (e.g., electricity consumption for lighting and/or heating)
- Benchmark performance against similar buildings and conduct energy audits with external providers to assess efficiency and consumption patterns, identify cost-saving opportunities, and set targeted improvement goals
- Conduct first wave of projects across diverse geographies and facility types to build experience and glean practical insights

Advanced action should target comprehensive energy upgrades across all facilities

Example activities include

- Establish a programmatic approach to advance energy efficiency initiatives across majority of buildings and equipment, supported by a long-term budget plan that allocates capital and resources and clear targets to empower execution by local teams
- Target deeper energy efficiency retrofits to secure greater savings, but require higher capital and significant planning / effort to implement (e.g., electrification of HVAC, building envelope upgrades, changeout of core equipment to make more efficient)



Actions (Renewables) | Retailers early in the journey should assess current energy sourcing and apply region-specific strategies to scale

Early action should prioritize identifying opportunities to effectively deploy renewables

Example activities include

- Assess current renewable energy usage and forecast broader energy needs to support renewable planning and procurement (e.g., estimate future demand, identify renewable energy needed to meet sustainability goals)
- Identify the most suitable renewable energy pathways (e.g., on-site solar installations, PPAs, vPPAs, unbundled certificates / RECs) and determine initiatives to prioritize and optimize adoption (e.g., develop region specific strategies, obtain financial approvals, establish clear objectives, facilitate effective implementation)

Advanced actions should prioritize defining a clear path to 100% renewable energy

Example activities include

- Target achieving 100% renewables in the immediate term using unbundled RECs
- Develop plan to meet 100% renewable energy beyond 2027 without unbundled RECs, focusing on sourcing PPAs, vPPAs, and building onsite capacity
- Once above is achieved, implement a plan to meet renewable energy commitments to meet power usage on a 24/7 matching basis



Relative impact & feasibility | Though emissions reduction potential is limited, energy efficiency and renewables can present quick wins





Case studies (Efficiency) | Retailers launch regional initiatives to increase energy efficiency for own operations and/or major supplier networks

IKEA launched initiative to boost HVAC energy efficiency and reduce carbon footprint



IKEA increased HVAC energy efficiency by 25% in two large Spanish stores by installing ABB's high-efficiency HVAC systems with advanced drives. This initiative is part of IKEA's broader sustainability goal to reduce carbon emissions by 80% by 2030, supporting its vision of becoming a fully circular and low-impact business

See IKEA Case Study for more info

Levers in action: Retail case studies

Walmart boosts energy efficiency in supply chain through Project Gigaton



Through **Project Gigaton**, Walmart worked with **5,900 suppliers** to improve supply chain **energy efficiency** using tools like the Factory Energy Efficiency tool and hosting summits. These efforts helped Walmart exceed its emissions reduction goal **six years early**, highlighting energy efficiency's role in cutting emissions See <u>Walmart Press Release</u> for more info Woolworths invests in comprehensive energy efficiency upgrades to bring down emissions



Woolworths has allocated **over \$77M to energy efficiency upgrades** throughout their operations, including replacing older lighting with LED solutions and upgrading refrigeration and air conditioning systems, contributing to their achievement of a **42% reduction in scope 1 & 2 emissions** relative to 2015 base year

See <u>Woolworths Sustainability Report</u> for more info



Case studies (Renewables) | Retailers leverage multiple strategies to accelerate adoption of renewables across portfolio

Levers in action: Retail case studies



CASE STUDY			
Transitioni	ng to 100% renewable elec	otricity	
We aim to trans energy partners to secure a path in F24 was at 23 investment in n and the commu for clean energy totaling 66MW and waterproof	High to 300% renewable electricity to p- white with CleanCo in Queensland. This, way to 100% renewable electricity by 2 6%, an increase of 0.9% on F23. Our p- with and provide new jobs in a sector the our renewable electricity generation to o nity, and provide new jobs in a sector the Dur renewable electricity offerts are so This year, we installed bi-facial solar pa- parking coverage for our customers.	ower our operations by 28 together with contracts in Q25 in line with RE100. Ou imary approach to invest grow the availability of gn at requires significant gr upplemented by our own inels to maximise solar pr	225. We established a new other states, has enabled us rotal renewable electricity ing in renewables prioritises see electricity for businesses owith to meet growing demand rooftop solar rollout program oduction whilst providing shade
Highlights fr	om F24:		
278	solar system installations estimated to power over 12,600 homes annually	100%	renewable electricity pathway secured
and Call	1826		1.1.2
			1.
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Woolworths aims to achieve **100%** renewable electricity by **2025**, with **23.5%** reached in F24, supported by CleanCo and other partnerships. In F24, **278 solar systems** were installed, powering over **12,600** homes annually. Efforts include bi-facial solar panels to maximize production and align with the **RE100** commitment

See <u>Woolworths press release</u> for more info

Walmart accelerates clean energy investments across the US to reduce emissions

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Walmart is advancing its energy transformation by enabling nearly 1 gigawatt of new clean energy projects across the U.S. These initiatives include community solar programs benefiting low-income households, long-term renewable energy purchase agreements, and collaborations with utilities to expand grid capacity

See Walmart Press Release for more info

IKEA invests €200 million to support renewable energy transition



IKEA launched a program to help suppliers in key countries like **Poland**, **China**, and **India** transition to **renewable electricity**. By **2023**, the program expanded to **ten additional markets**. The program provides both off-site solutions like **Power Purchase Agreements** and on-site options such as **solar panel installations**



Ahold Delhaize signs Power Purchase Agreement as part of its European Renewable Energy Program



Ahold Delhaize signed a Virtual Power Purchase Agreement (VPPA) with Spanish energy company BRUC to support the construction of five solar plants in Seville. Once operational in 2026, the project will supply approximately 460,000 MWh of renewable electricity annually—covering around 30% of the retailer's European energy see Ahold Delhaize press release for more info Consumption



Resources | Regulations and frameworks will inform strategy for increasing low carbon energy (I/II)

(Non-exhaustive)	Description	Relevant resource(s)
Regulations impacting future compliance requirements (Mandatory)	EU Fit for 55 package: Comprehensive set of legislative proposals to revise and update EU legislation covering various sectors (e.g., renewable energy, energy efficiency, vehicle & aviation regulations) aimed at reducing the EU's GHG emissions by 55% by 2030	 <u>EU Fit for 55 Package overview</u> <u>Fit for 55: how the EU will become more</u> <u>energy-efficient</u> <u>Fit for 55: how the EU plans to boost renewable energy</u>
Building energy efficiency standards (Mandatory)	2022 California Energy Code: Mandates energy efficiency upgrades in new builds and major renovations to reduce GHG emissions. Updates promote usage of electric heat pumps, require electric-ready infrastructure, expand solar and battery storage requirements, and improve ventilation for better indoor air quality. California's market power has been instrumental in driving performance standards globally	 <u>2022 Building Energy Efficiency Standards Summary</u> <u>Proposed 2025 Building Energy Efficiency</u> <u>Standards Timeline</u>
	RE100: Global initiative encouraging companies to commit to 100% renewable electricity offering technical guidance to accelerate shift towards clean energy	<u>RE100 2024 Reporting Guidance</u>
Frameworks and target-setting guidance (Voluntary)	EP100: Global initiative of 125+ businesses committed to doubling energy productivity, implementing energy management systems, or achieving net-zero buildings	 <u>EP 100 FAQ</u> <u>EP100 Energy Efficiency: Net Zero's Invisible Ally report</u>
	SBTi Guidance: Developed guidance (supported by CDP) to support electric utilities in setting science-based targets and clarify target-setting boundary options and requirements	 <u>SBTi Setting 1.5°C-aligned Science-based Targets: Quick</u> <u>Start Guide for Electric Utilities</u> <u>SBTi Corporate Near-Term target-setting tool</u>

Mandatory regulation

Voluntary standard, framework, or guidance



Resources | Regulations and frameworks will inform strategy for increasing low carbon energy (II/II)

(Non-exhaustive)	Description	Relevant resource(s)
Funding and incentive mechanisms (Voluntary)	Funding opportunities under Inflation Reduction Act (IRA): Directs ~\$400B in US federal funding to reduce carbon emissions by 2030 through tax incentives, grants, and loan guarantees for clean electricity, transmission, clean transportation, and EV incentives	Inflation Reduction Act Guidebook
Business guidance (Voluntary)	Several resources exist that provide actionable guidance and recommendations for increasing energy efficiency and renewable energy at the corporate level	 <u>Turbocharging the Energy Transition by Boosting</u> <u>Customer Demand</u> (BCG publication) <u>A Rapid Energy Transformation Is Good for Nature and</u> <u>the Climate</u> (BCG publication) <u>Accounting for Change: Policies and Technical</u> <u>Approaches for Reducing Greenhouse Gas Emissions</u> <u>through Energy Efficiency Programs</u> (American Council for Energy-Efficient Council publication) <u>RILA Corporate Clean Energy Procurement Index report</u>



Increase low carbon transportation

Shared Vision of The Future:

Retailers' supply chains utilize electric/alternative-fuel vehicles, optimize route efficiency, and leverage alternative transport modes to minimize emissions

Return to key challenges





Climate Action in Practice Guide | Preview of increasing low carbon transportation insights, resources and activities to consider

Low Carbon Transportation Overview	Regional Considerations	Activities Retailers Should Conside
Image: Content in the space is nassent, with limited partners (e.g., alternative low carbon transportation technologies can be costly, there is significant medium-term potential for impactful emissions reductions. Image: Content in this space is nassent, with limited partners (e.g., alternative low carbon transportation may require extensive operational changes (e.g., network optimization, switching fleets to EVs from gasoline trucks). Image: Content in the space is nassent, with limited partners (e.g., alternative low carbon transportation may require extensive operational changes (e.g., network optimization, switching fleets to EVs from gasoline trucks). Image: Content in the space is nassent, with limited partners (e.g., alternative low carbon transportation may require extensive operational changes (e.g., network optimization, switching fleets to EVs from gasoline trucks). Image: Content in the space is nassent, with limited partners (e.g., alternative low carbon transportation fleets to EVs from gasoline trucks). Image: Content in the space is nassent, with limited partners (e.g., prematurely on truck set to EVs from gasoline trucks). Image: Content in the space is nassent, with limited partners (e.g., prematurely committing to truck electrification without considering future operational changes). Image: Content in the space is applied to content in truck partners is gainfloant positive impacts for local communities through reducing the utilization of heavy-duty and polluting vehicles in last-mile delivery ₁₅₂	<page-header></page-header>	<image/> <section-header><section-header><section-header><section-header><section-header><section-header><section-header><section-header><section-header><section-header><section-header><section-header><section-header><section-header><section-header><section-header><section-header><list-item></list-item></section-header></section-header></section-header></section-header></section-header></section-header></section-header></section-header></section-header></section-header></section-header></section-header></section-header></section-header></section-header></section-header></section-header>



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(Non-exhaustive)	Description	Relevant resource(s)	
Regulation (Mandatory)	CA Learning Order 17-32: Regulars CA All Insurance in bard (CARI) CA Learning Content 17-32: Regulars CA All Insurance in bard (CARI) Insurance in the CARING AND ALL INSURANCE IN THE INSURANCE Insurance I	CARE advanced clean fleets CARE recommission on road medium: and beavy-duty strategies	
Multi-state agreements (Voluniary)	Multi-State ZEV Taskforce: Launched in 2020, coalition of 15 states and DC committed to 30% ZEV sales for new medium- and heavy-duty trucks by 2030 and 100% by 2050 in their respective states	Multi-state ZEV taskforce memo	
Frameworks and target-setting guidance (Voluntery)	EV100: Coalition of 120+ companies across 100 markets committing to electrify their passenger and light dury fleet (~5.75 million vehicles) and instal floraging inforstructure by 2030 EV100+: Building off the success of EV100, new initiative focused on medium- and heavy-dury vehicles	• EV100 • EV100+	
Business guidance (Voluntary)	Several resources exist that provide actionable guidance and recommendations for increasing low carbon transport at the corporate level	Accelerating ZEV adoption in fleets to decarbonize road transportation (ICCT publication) Accelerating the Shift to Sustainable Transport (BCG publication)	



Overview | What to know about increasing low carbon transportation

Strategic Context



Currently available low-carbon transportation technologies remain costly, but offer **significant medium-term potential** for impactful emissions reductions

Key Challenges



The **vendor landscape is nascent**, with limited partners in areas like alternative fuel and EV charging infrastructure – likely requiring significant upfront capital and technical expertise



Scaling low carbon transportation **may require extensive operational shifts**, such as network optimization and transitioning fleets from gasoline to electric vehicles

Opportunity & Solutions



Strategic planning and comprehensive analysis of short- and long-term factors are crucial, helping **avoid costly, irreversible decisions** (e.g., committing to truck electrification without accounting for future operational needs)



Low carbon transportation can deliver **meaningful benefits for local communities**, reducing the use of heavy-duty, high-emission vehicles in last-mile delivery



Not exhaustive

US & Canada | Advancing electric truck adoption

Federal and state incentives support the development and adoption of electric heavy-duty trucks, reducing the costs of fleet conversion^{1,2} – US, Canada

Latin America | Limited infrastructure

High costs and limited infrastructure for low-emission vehicles mean retailers should prioritize operational efficiency to reduce emissions³ - *e.g., Brazil, Argentina*

Europe | Zero-emission mandates

EU regulations pushing for zero-emission transport require retailers to transition fleets, impacting investment decisions⁴ - *EU*

Asia | Electrification opportunities

Advanced EV infrastructure makes it easier for retailers to electrify fleets, and autonomous trucking acceleration has tailwinds for EV adoption⁵ - *China*

Africa | Limited infrastructure

High costs and limited infrastructure for low-emission vehicles mean retailers should focus on operational efficiency to reduce emissions⁶ - *numerous countries*

Oceania | Limited infrastructure

High costs and limited infrastructure for low-emission vehicles mean retailers should focus on operational efficiency to reduce emissions⁷ - *Australia*

1. US federal incentive have become more uncertain given new US administration's likely priorities. Sources: 2. RMI, "The Inflation Reduction Act Will Help Electrify Heavy-Duty Trucking", 2022; 3. BCG analysis; 4. European Commission, "Delivering the European Green Deal," 2021; 5. WIRED, "China is Racing to Electrify its Future", 2022; 6. EnergyNews Africa, "Electric Vehicle Adoption: Infrastructure Challenges in Africa", 2024; 7. Clayton Utz, "Emerging Challenges for Australia Electric Vehicle Charging Infrastructure", 2022

Regional considerations





Actions | Retailers can establish baseline logistics and a clear strategy as a first step, refining both iteratively to scale

Early action should establish a baseline and develop an actionable strategy

Example activities include

- Establish baseline for inbound and outbound logistics (e.g., locations, specs, modes of transport, distance traveled, % owned vs. 3rd party fleet)
- Develop practical, actionable strategy based on logistic baseline that aligns with long-term goals (e.g., route optimization to improve fuel efficiency and reduce travel distance)
- Start with gradual, region-specific hub deployment of electric/ low carbon transport for lighter duty or shorter-distance routes, allowing for iterative learning and improvement to refine strategy

Advanced action should focus on targeted deployment and investment

Example activities include

- Assess and deploy low-carbon transport for medium-distance (<100 miles) routes or those served by heavy duty vehicles, considering full set of options (e.g., mode-shifts, network optimization)
- Collaborate with peers to enable collective buying and facilitate potential co-investment in cost-effective technologies for harder-to-decarbonize logistics segments (e.g., to develop Class 8 e-trucks for medium distances, fast charging infrastructure to meet operational needs)



Relative impact & feasibility | Meaningful emissions reductions are possible, although affordability remains a challenge for now





Case studies | Retailers employ variety of innovative solutions and strategic partnerships to reduce emissions across their fleets

DFI launches electric trucks to cut logistics emissions

	:K
IKEA Taiwan welcomed the first electric truck in our fleet.	provides inventory replenishment services to stores from the
In comparison to a 10.5-tonne diesel truck, the 26-tonne	new IKEA fulfilment centre.
equivalent to 5.38 tonnes of carbon dioxide every year.	We also collaborated with TCC Energy Storage Technology Corporation to install charging stations to support our
The vehicle was also the first 26-tonne electric truck	transition to using the electric truck. Through the combined
introduced in Taiwan. This achievement was made passible	efforts of the three parties, we aim to promote zero-carbon
through our collaboration with Swedish truck manufacturer	and areen logistics transportation development in Taiwan.
Scania, and Taiwan Transport & Storage (TTS), a subsidiary	and look forward to using more electric vehicles for
of Taiwan Cement Corporation (TCC). The electric truck	inventory replenishment and home delivery services.

In 2023, DFI launched **electric trucks** in Taiwan and Hong Kong, cutting logistics **emissions significantly**. In Taiwan, a **26-tonne truck** reduced emissions by **18%**, while Hong Kong's **24-tonne truck**, funded by the government, will cut **24,000 tonnes of CO**₂ over its lifetime

See **DFI Sustainability Report** for more info

Levers in action: Retail case studies

Walmart advances alternative fuels and innovative technology to reduce transport emissions



Walmart is piloting alternative fuel solutions, including renewable natural gas, hydrogen, and electric vehicles to reduce emissions from its transportation fleet. Additionally, they are collaborating with partners (e.g., Chevron) to drive innovation and test new technologies in Class 8 trucks, refrigerated trailers, and yard trucks.

trucks. See <u>Walmart Press Release</u> for more info

Carrefour converts waste from stores into biofuel



Carrefour sorts and recovers bio-waste in stores, then converts the waste to fuel for biomethane trucks. By the end of 2024 Carrefour planned to have **1,000 biomethane trucks** in circulation, which produce **80% less GHG emissions** than traditional transportation methods

See Carrefour Website for more info



Resources | Monitoring emerging regulations is crucial to guide low carbon transportation strategy and avoid costly missteps

(Non-exhaustive)	Description	Relevant resource(s)
Regulation (Mandatory)	CA Executive Order N-79-20 : Requires CA Air Resources Board (CARB) to develop and propose strategies to achieve 100% zero-emissions from medium- and heavy-duty on-road vehicles by 2045 and from drayage (container shipping) vehicles by 2035. Several existing incentive programs can help fleet owners comply CA Advanced Clean Fleet Regulation: Supports EO N-79-20 by specifying transition timeline for government-owned and "high-priority" fleets ¹ . In 2035, only ZEVs ² will qualify for new purchase New York, New Jersey, Oregon, and Washington passed similar laws	 <u>CARB advanced clean fleets</u> CARB zero-emission on-road medium- and heavy-duty strategies
Multi-state agreements (Voluntary)	Multi-State ZEV Taskforce: Launched in 2020, coalition of 15 states and DC committed to 30% ZEV sales for new medium- and heavy-duty trucks by 2030 and 100% by 2050 in their respective states	<u>Multi-state ZEV taskforce memo</u>
Frameworks and target-setting guidance (Voluntary)	 EV100: Coalition of 120+ companies across 100 markets committing to electrify their passenger and light duty fleet (~5.75 million vehicles) and install charging infrastructure by 2030 EV100+: Building off the success of EV100, new initiative focused on medium- and heavy-duty vehicles 	 <u>EV100</u> <u>EV100+</u>
Business guidance (Voluntary)	Several resources exist that provide actionable guidance and recommendations for increasing low carbon transport at the corporate level Mandatory regulation Voluntary standard,	 <u>Accelerating ZEV adoption in fleets to decarbonize road</u> <u>transportation</u> (ICCT publication) Accelerating the Shift to Sustainable Transport (BCG publication) framewThe Read Abread for Low-Carbon Fuels (BCG publication)

1. "High priority" defined as entities with \$50m+ gross annual revenue that own, operate, or direct 1+ vehicle in California, or entities that operate 50+ vehicles in the state. 2. ZEV = zero-emissions vehicle



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2

Join the CGF to collaborate with industry leaders and drive positive change

Thank you