

Decarbonising Glass

The role of natural soda ash

15 May 2025



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The carbon footprint of glass

Three major sources of emissions



Raw Materials

The production of raw materials silica sand soda ash, dolomite and others



Energy and electricity

Energy to provide heat and electricity to drive machines and processes



Process Emissions

Emissions from the decomposition of carbonates

What choices do we have?

A range of levers are available

Cullet



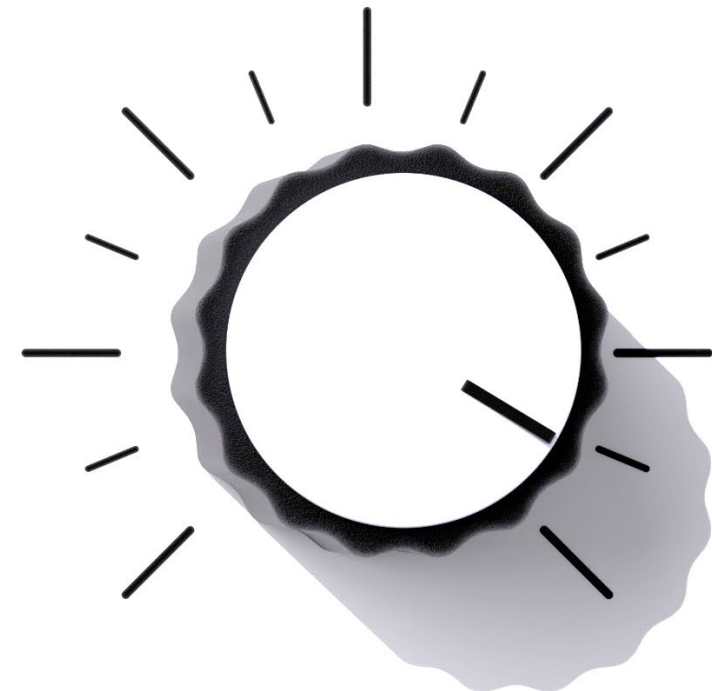
Refurbishment and reuse

Energy recovery



Light-weighting (container)

Electrification and renewables



Low carbon raw materials

What about soda ash?

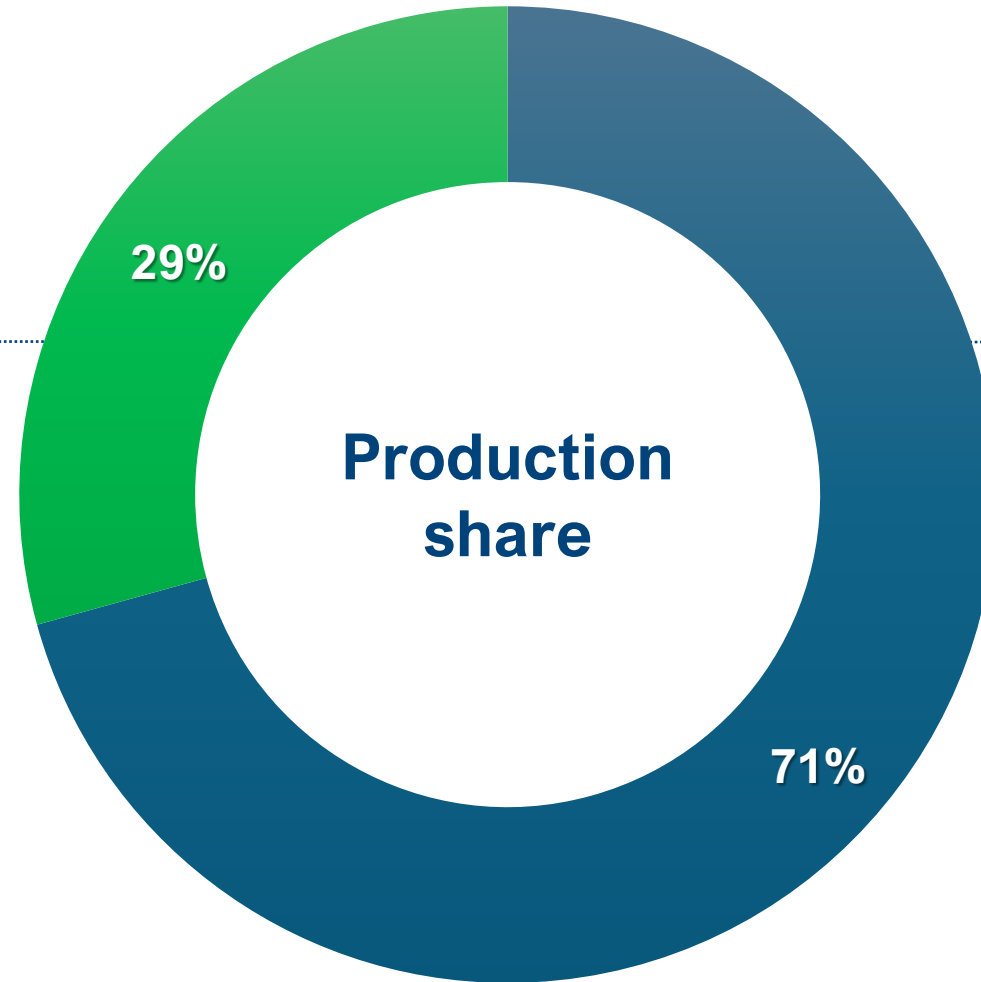
There are two main types of soda ash

Natural and synthetic

Natural

7%
Primary &
secondary
solution mining

22%
Conventional
mining



Synthetic

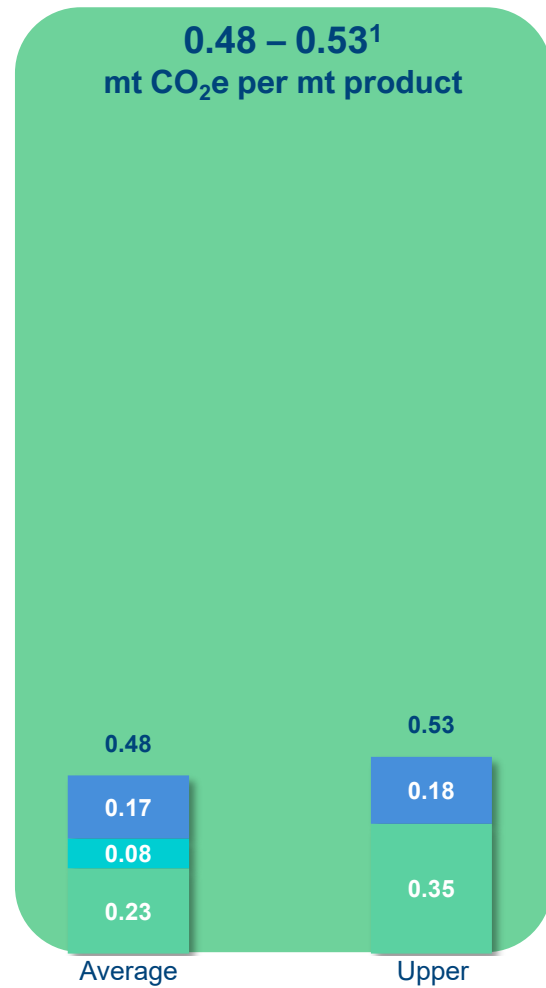
50%
Ammonia-Solvay
process

21%
Hou-process

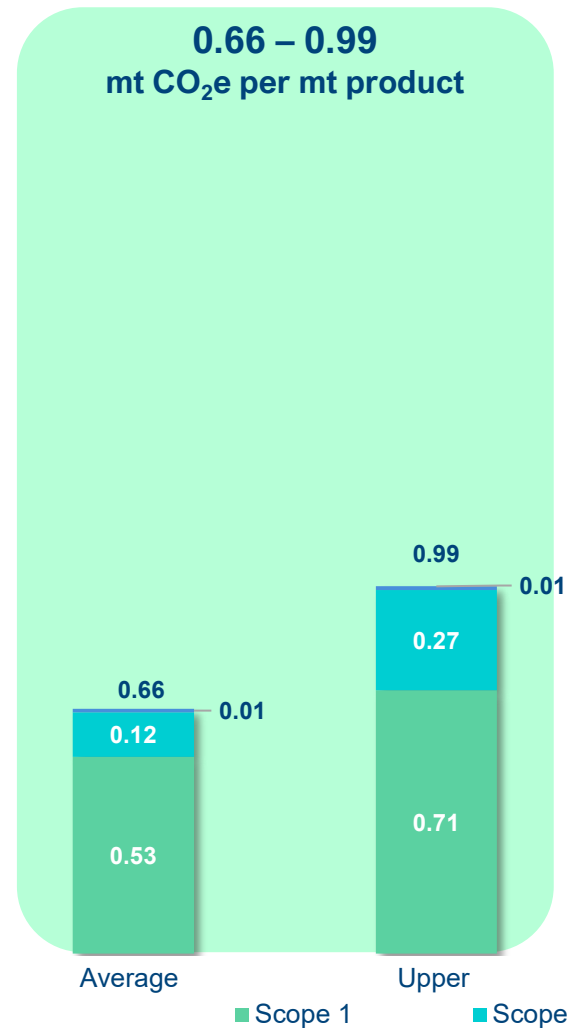
Not all soda ash is created equal

The carbon difference between natural and synthetic

Primary solution mining¹



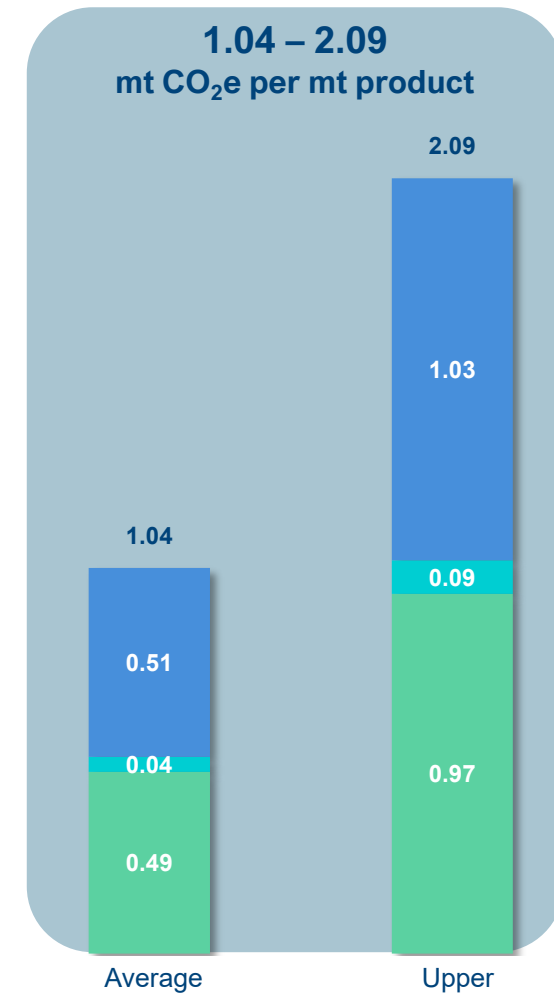
Conventional mining²



EU based ammonia-Solvay process²



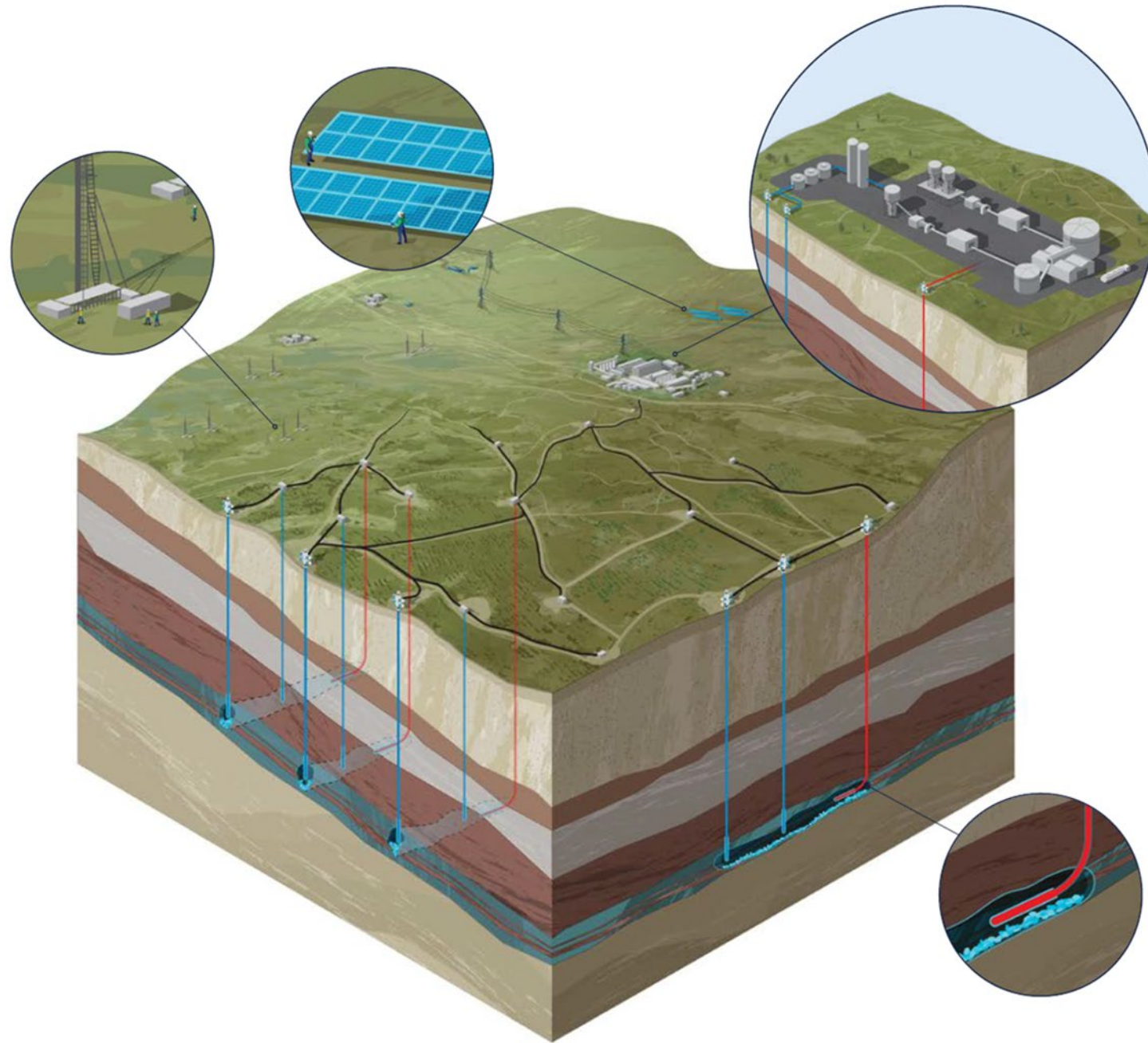
Hou process²



Notes: 1. WE Soda Annual Report 2023 – GHG Protocol. Emissions intensity for the production of soda ash and sodium carbonate combined. 2. Nexant ECA Analysis 2024

Primary solution mining: A lower impact alternative

The benefits of primary solution mining



Benefits

1/2 the energy intensity

Low temperature

Insoluble material left below ground

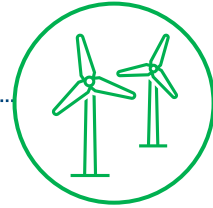
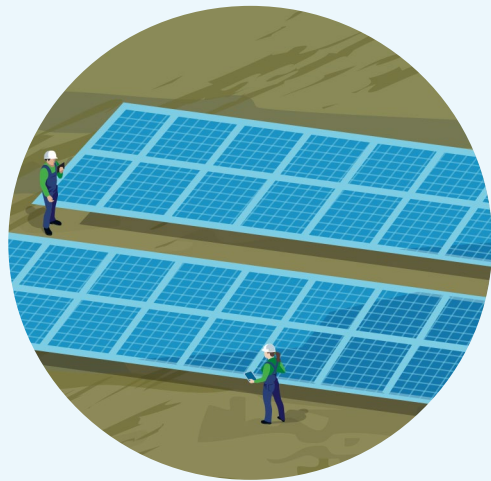
Process CO2 recycled

Our journey to Net Zero by 2050 – from a low base

20% intensity reduction by 2027 and 40% by 2032

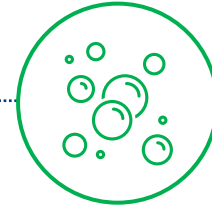
Wide range of options

Decarbonisation plan to be published in 2025



Renewable Energy

- Installing up to 250 MW
- Utilising biomass where it can be sustainably sourced
- Procuring renewables from the grid



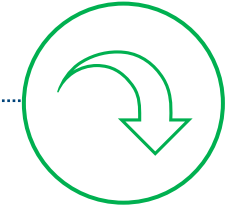
Carbon capture and utilisation

- Capturing and utilising up to 180kt
- Pure CO2 for use in the beverage industry
- Development of capture technology



Coal phase out

- Eliminating the use of coal
- Switching to either natural gas or biomass
- Identifying seasonal source of sustainable biomass

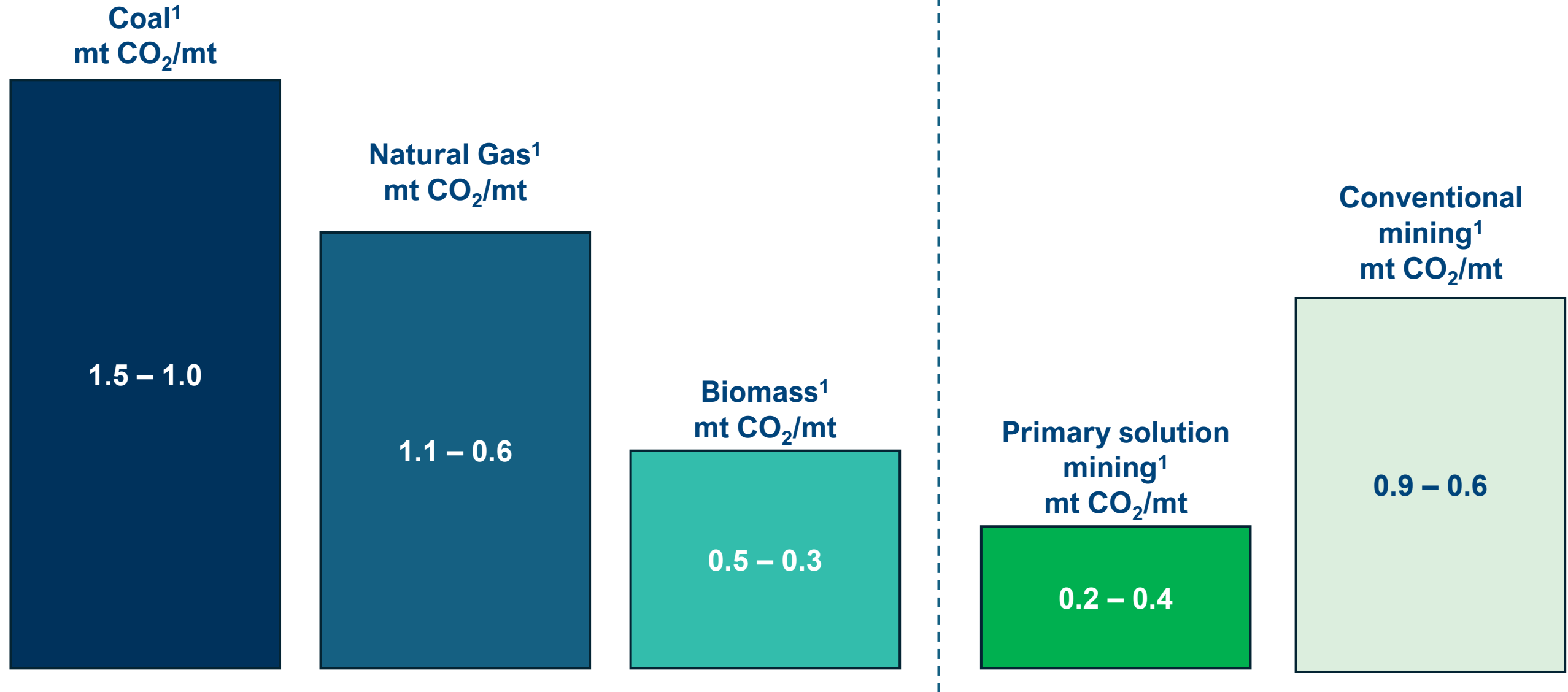


Carbon capture and storage

- Developing regulatory framework
- Identifying geological sinks
- Developing technology

Synthetic soda ash can close the gap

Scope 1 and 2 emissions



1) WE Soda analysis

Quantifying the difference



The potential carbon savings within glass production

Primary solution mining compared to synthetic soda ash

Assumptions

Primary solution mining

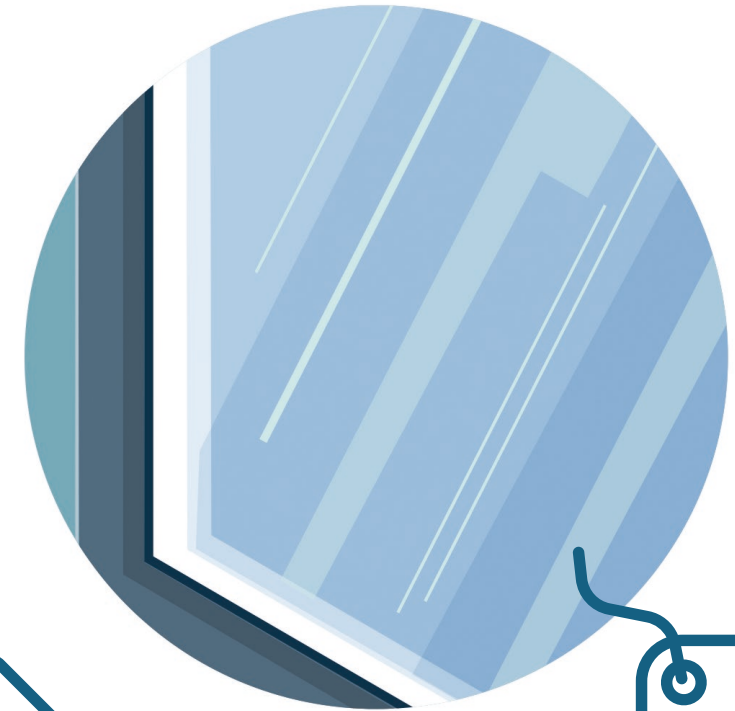
Coal based synthetic

Transport distances

Cullet & Batch mix

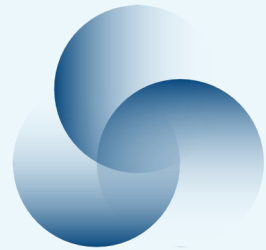
Emission factors

Fuel type



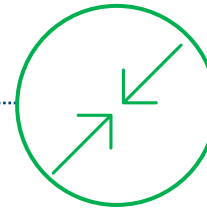
This work is urgent and collective





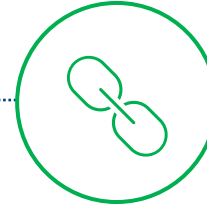
Sustainability as a service

“Working with our customers as partners to jointly develop products and solutions that will allow them to fulfil their own sustainability goals whilst also achieving ours”



Reduce embedded carbon

Help customers cut the carbon footprint of their products by supplying lower-carbon raw materials



Build partnerships

Build partnerships up and down the glass value chain and with other industries



Drive innovation

Collaborating with our customers to develop solutions to sustainability challenges

Thank You

Will Chaplin – Product Sustainability Manager

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