Nuclear-Industrial Integration

Energizing the Future with Innovation and Resilience

NUCLEAR

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Advanced Nuclear Technology (ANT) Program Focus

MISSION: Accelerating the deployment of nuclear power around the world.

Engineering & Construction Innovation	Project Development & Execution	Advanced Manufacturing & Materials Qualification	Advanced Reactor Materials Reliability	Nuclear Design & Fuel Cycle	Commissioning, Initial, Operations & Maintenance	Nuclear Beyond Electricity

3002031739 – ANT 2025 Product Catalog

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- More than 90 companies
- 240+ Past Products
- Dozens of Ongoing Projects

2025 ANT Membership

ANT Participation Extended to Over 90 Companies

NUCLEAR SECTOR BASE MEMBERS

52 Global Members

>83% of the world's commercial nuclear units

>340 reactors worldwide

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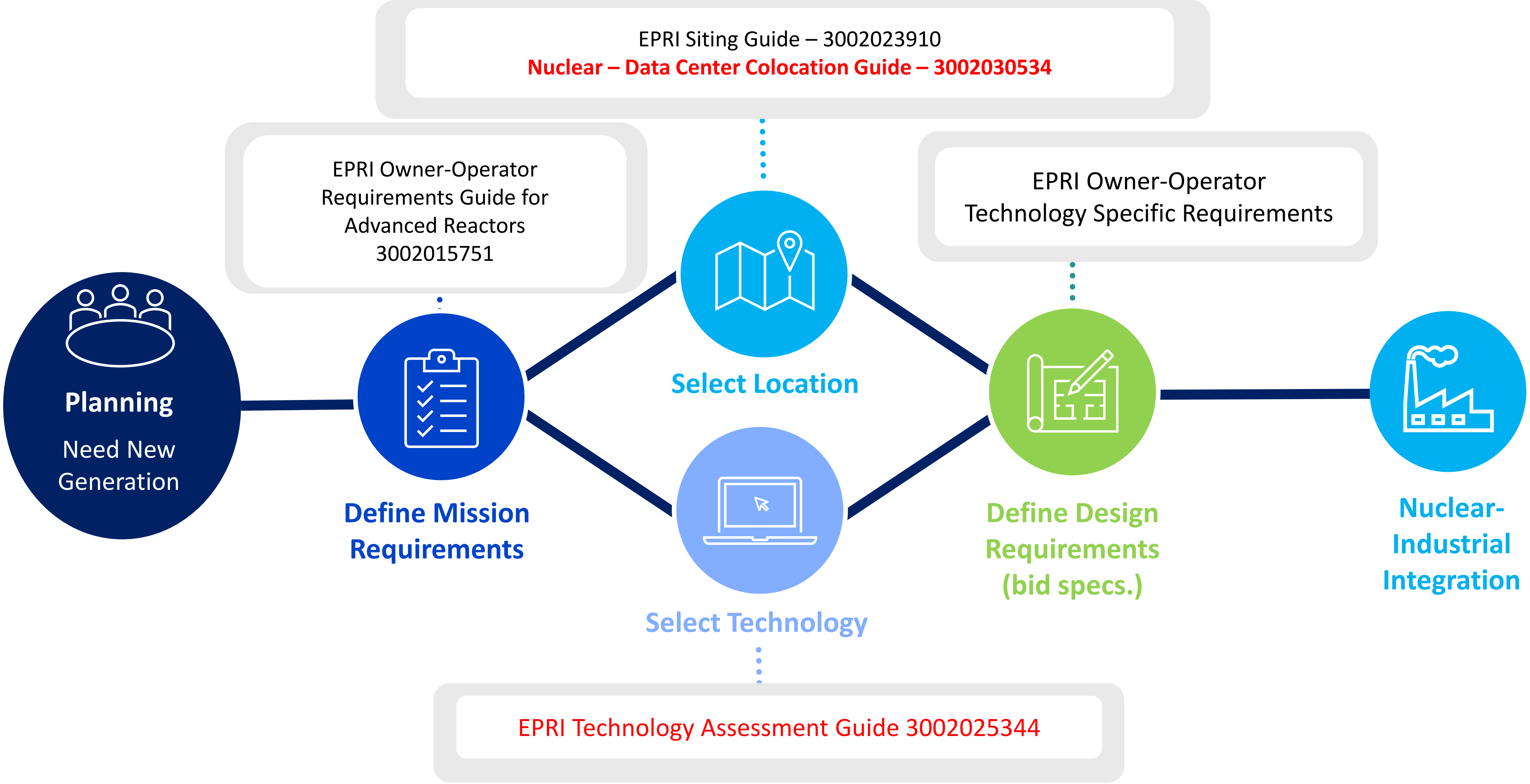
EPRI Guides Overview



EPRI’s Nuclear Beyond Electricity

Data Centers

Process Manufacturing

Low Carbon Fuels

Energy Storage

Water & Wastewater

Medical Isotopes

District Energy

Maritime

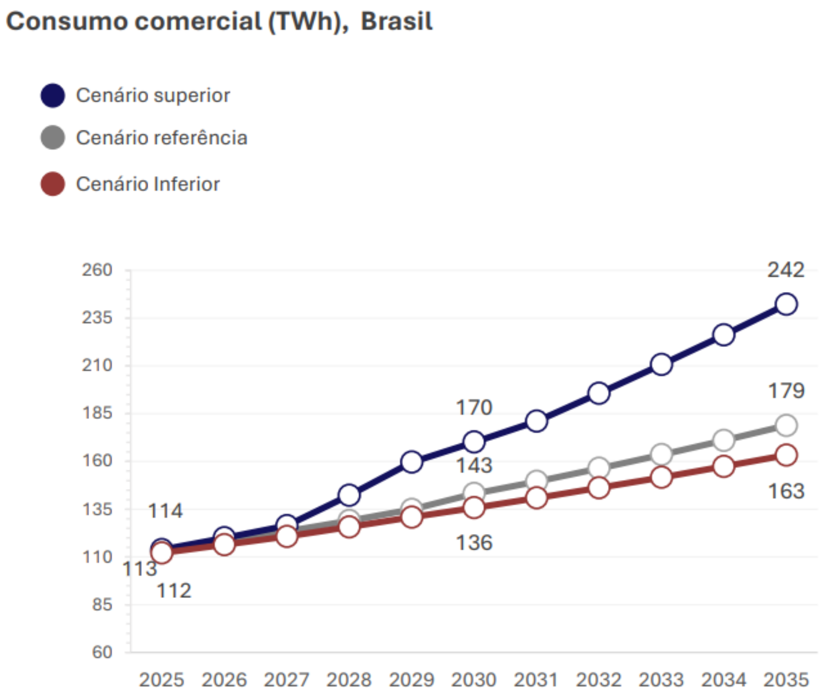
GOAL

Enable **existing** and **future** nuclear plants to **participate in energy markets beyond the practice of generating baseload electricity**.

Nuclear Beyond Electricity in Brazil

Expected Electricity Demand Growth

- Electricity consumption is projected to grow about **3.3% per year through 2035** in the reference scenario.
- Total **demand increase** between **~30-40 %** (lower and reference scenario) to **>100 %** (high case scenario) **.**
- **Key drivers** are **industrial growth**, **data centers and AI infrastructure**, **green hydrogen**, **electrification of transportation**, commercial and residential growth and expansion of **mining** and **metals processing.**
- Electrical **grid needs to meet demand growth at this rate**
- **60+ NPP are under construction** worldwide (China, India, Egypt, Korea, Turkey, Russia, Bangladesh, USA, Canada, Romania, and UK).



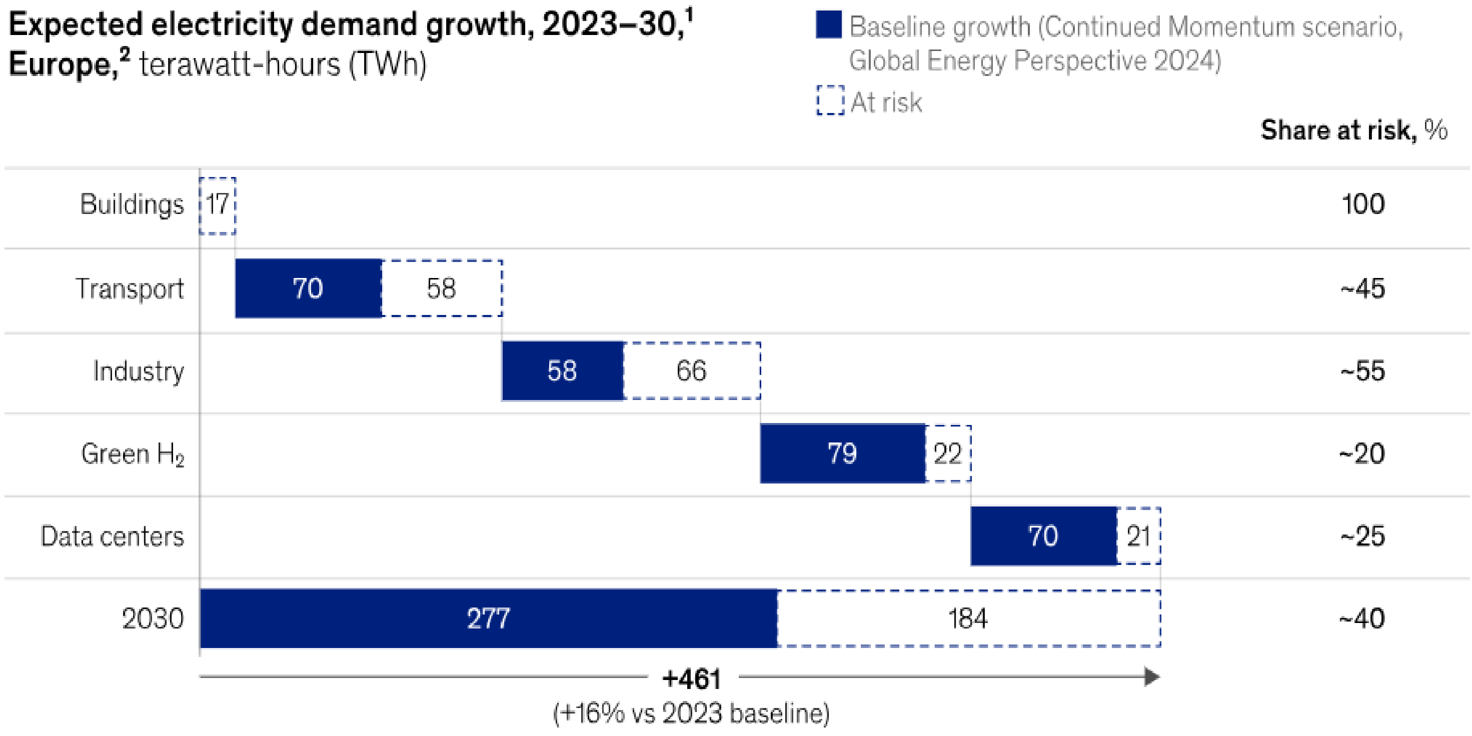
Note: Demanda de Eletricidade, Setembro 2025 (source Ministry of Mines and Energy)

Nuclear installed capacity is ~2 GW (Angra 1 and 2)

Big numbers and uncertainty exists

Uncertainties and Risks by 2030 – European Example

- Industry ~55%
- Transportation (EVs) ~45%
- Green H_2 (~20%)
- Data Centers (~25%)



[1]Base case projection from McKinsey's Continued Momentum 2024 scenario; demand at risk estimated with a sensitivity to technology adoption rates and industrial output reductions.
[2]EU-27, Norway, Switzerland, and the United Kingdom.
Source: *Global Energy Perspective 2024*; team analysis

Cost and Demand Uncertainty

Nuclear Process Heat Demand

- Industrial:
  - ARs and LWRs with heat augmentation can **provide high temperature heat to industries that where not achievable before**.
  - Process **heat demand between 100-700°C results in ~8,000-10,000 TWh/year** (3x global nuclear energy contribution).

Country	Plant / Reactor	Existing cogenerations
Switzerland	Beznau	District heating (~150 GWh_{th}/year)
China	Haiyang, Shandong, Yanlong	District heating
Russia	VVER-1200, BN-1200, KLT-40	Industrial heat, district networks
Ukraine	Zaporizhzhia	City district heating
France	Bugey	Urban heating (Lyon) via steam extraction
Canada	Bruce	Industrial facility steam/heating
India	Madras	Desalination: ~6,300 m^3/day using hybrid MSF + RO
USA (future)	Dow/X-energy	Process heat in chemical/refinery

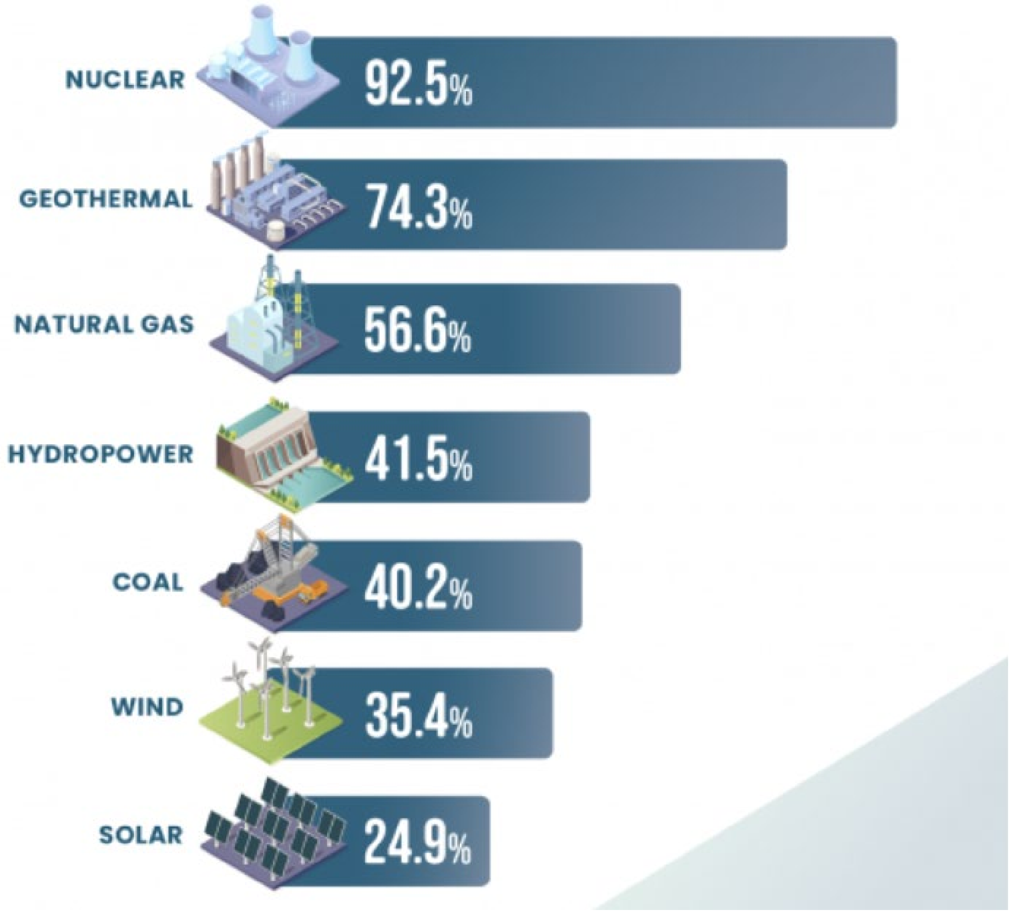
Competing against fossil fuel- Need to develop regional business cases

Nuclear Heat and Electricity Integration

Why Nuclear - Capacity Factors by Energy Source

Nuclear power has the highest capacity factor according to the U.S. Energy Information Administration.

- ~2x higher than Natural Gas and Coal
- ~3x higher than Wind and Solar
- Nuclear is a zero-carbon emitting technology

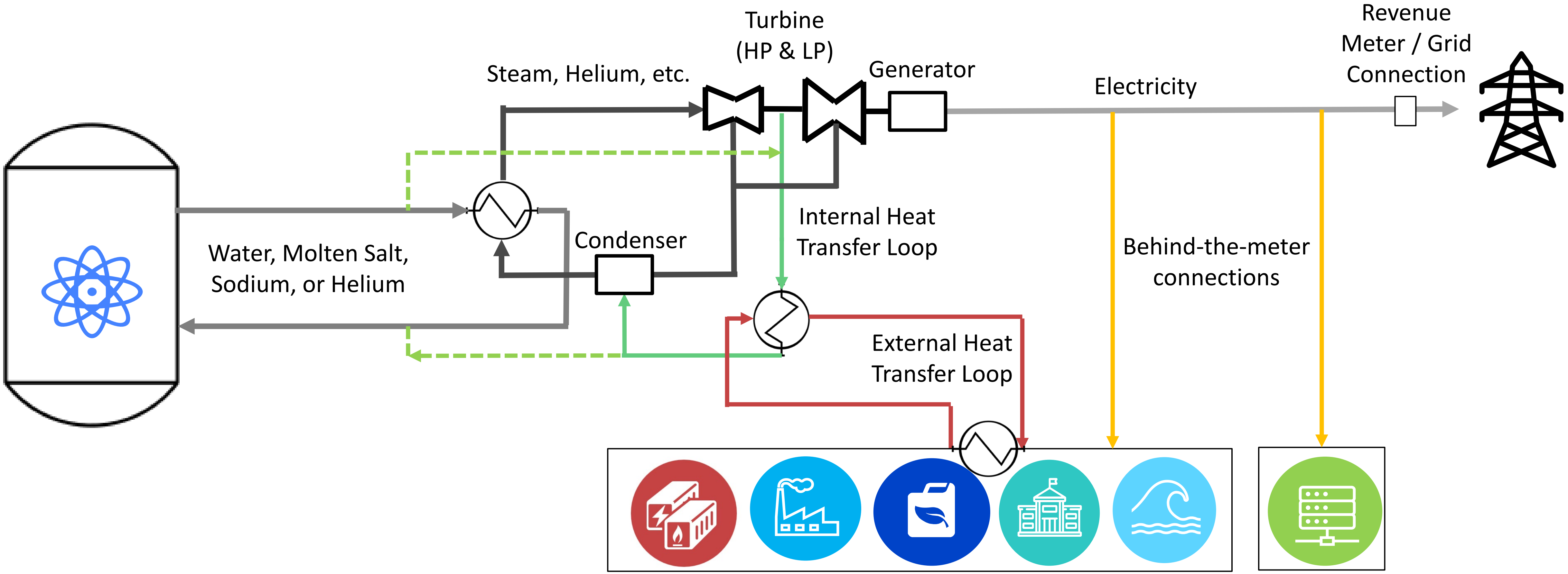


Source: EIA and Department of Energy, https://www.eia.gov/electricity/monthly/epm_table_grapher.php?t=epmt_6_07_a and https://www.eia.gov/electricity/monthly/epm_table_grapher.php?t=epmt_6_07_b

Reliable power is needed for industrial processes

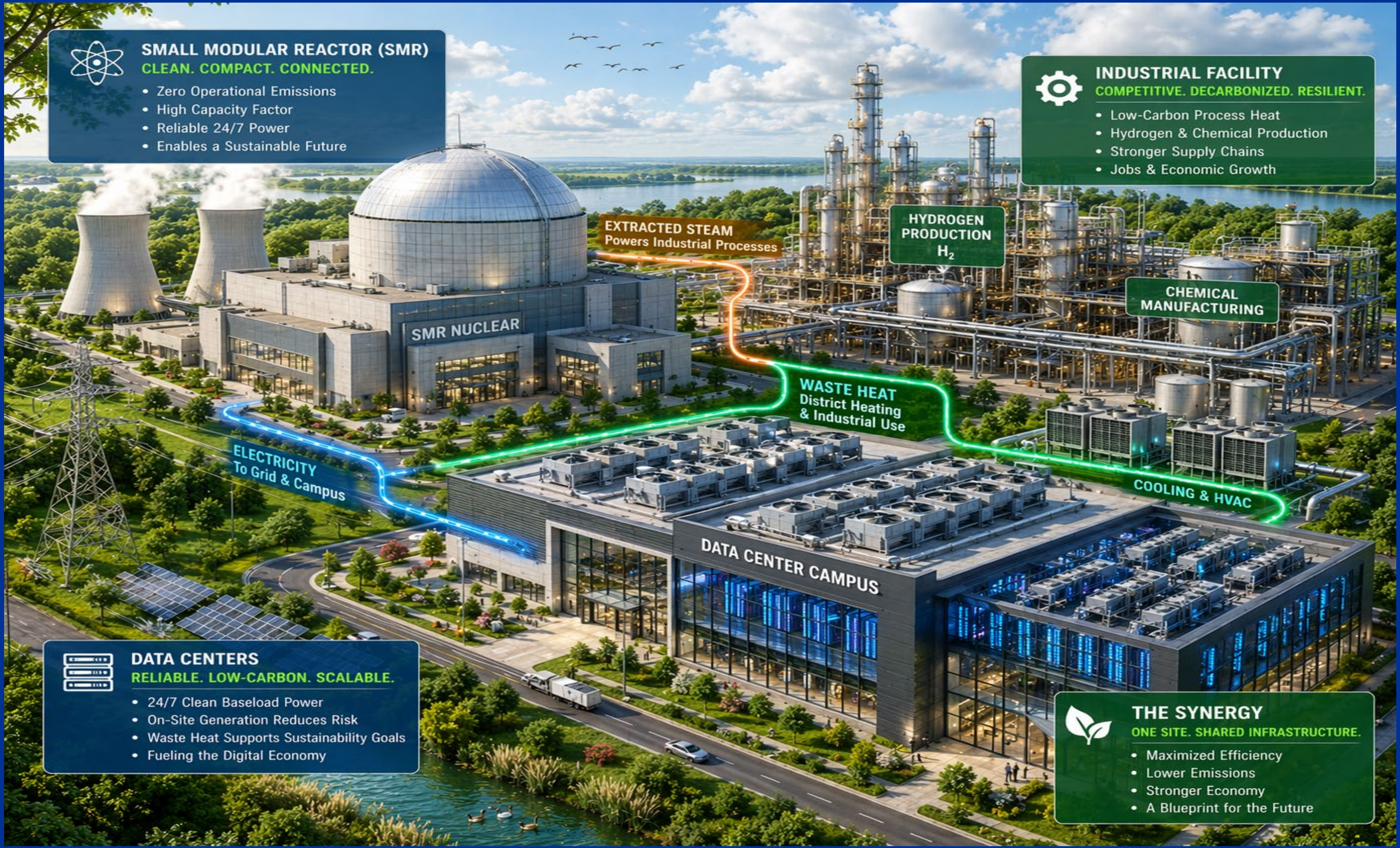
Nuclear-Industrial Integration

Generic Example of Nuclear Cogeneration:

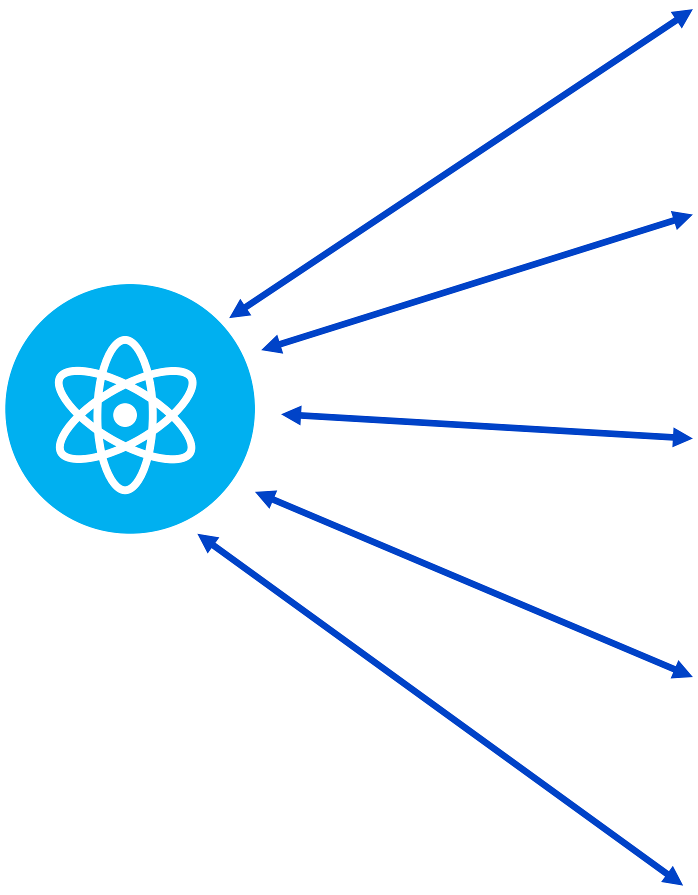


Note: The shown concept is for illustration purpose only. The specific integration depends on the reactor design, power conversion cycle (Rankine or Brayton) and application.

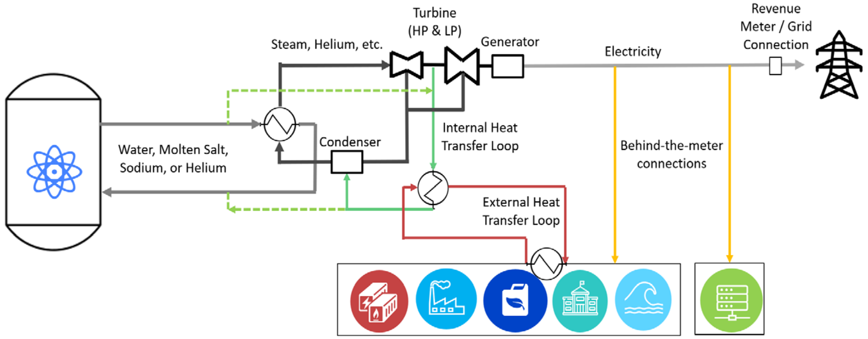
NBE Enables Economic Nuclear Industrial Integration and Deployments



EPRI's Nuclear-Industrial Integration Focus Area



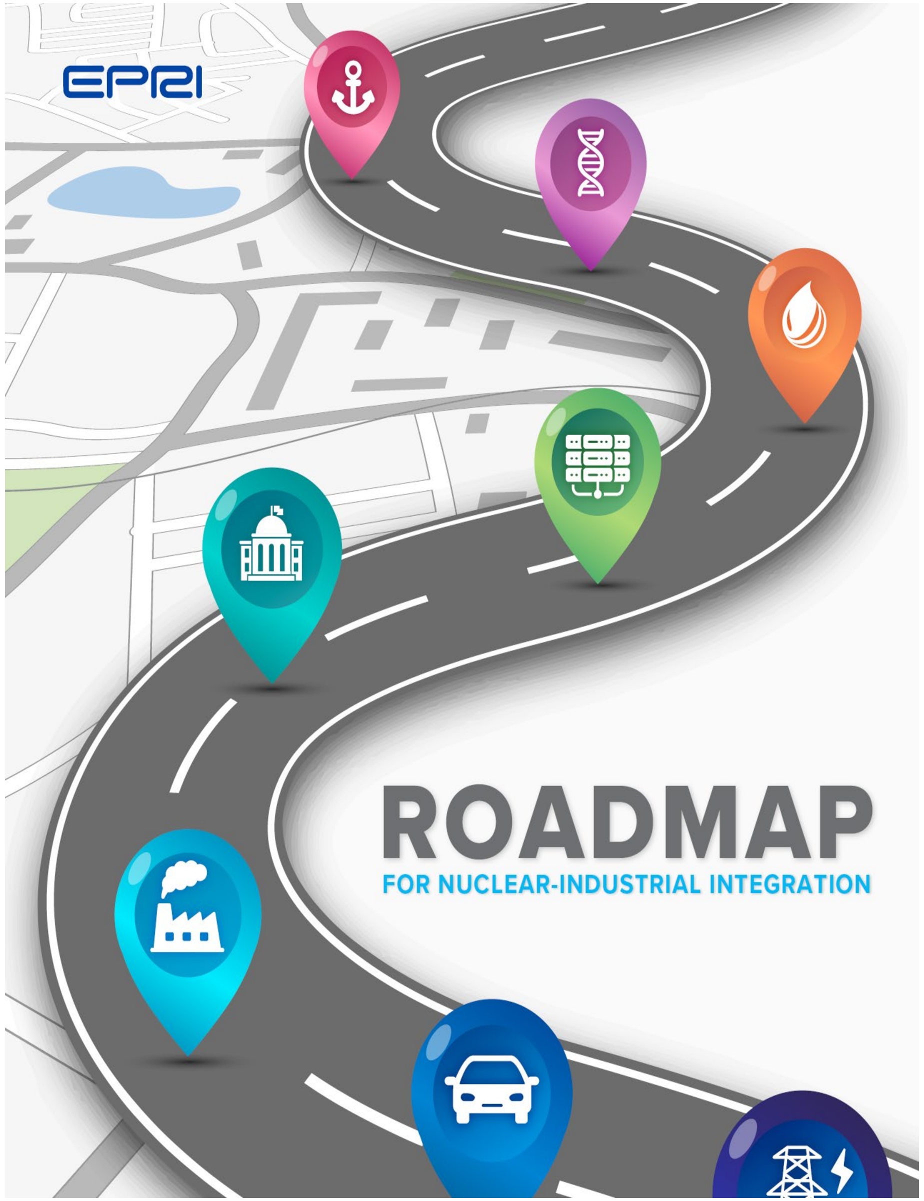
1. Oil & Gas Industry
2. Chemical Industry
3. Pulp & Paper Industry
4. Mining Industry
5. Water Treatment & Desalination Industry



NBE Roadmap

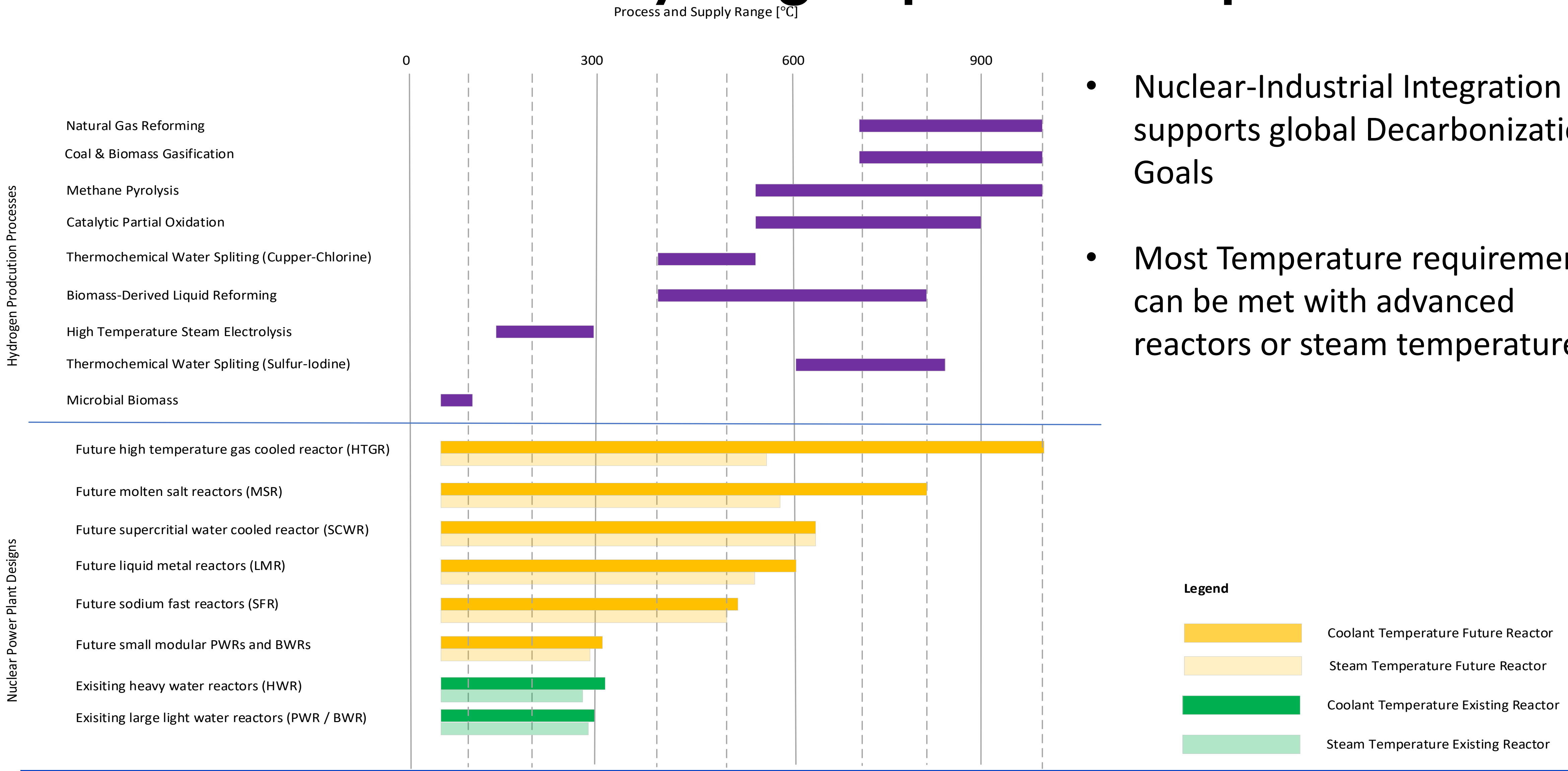
Addresses challenges identified during the Nuclear for Industrial Integration Workshops

Technical	01	Permitting	06
Operational	02	Project Development & Execution	07
Financial	03	Security	08
Ownership	04	Public Awareness	09
Policy / Regulatory	05	Insurance	10



Integrated Nuclear Hydrogen Production

Match NPP heat with hydrogen production processes



- Nuclear-Industrial Integration supports global Decarbonization Goals
- Most Temperature requirements can be met with advanced reactors or steam temperature lift.

Most LWR designs can benefit from a steam temperature lift to cover a wider range of processes

Reports on Nuclear Integrated Hydrogen Production

- Methods of Nuclear Integrated Hydrogen Production (3002027703)

The following nuclear integrated hydrogen production methods are addressed:

- Steam Methane Reforming
- Autothermal Reforming
- Biomass-Derived Liquid Reforming
- Partial Oxidation
- Coal & Biomass Gasification
- Methane Pyrolysis
- Chemical Looping Reforming
- Thermochemical Water-Splitting (S-I and Cu-Cl)

- Conceptual Design Guide for Developing a Nuclear-Integrated Hydrogen Facility (3002026514)

This guide provides general input and considerations for electrolyzer technology selection:

- PEM, Alkaline, SOEC
- Hydrogen plant design
- Nuclear plant integration design
- Overall project planning

Technical Considerations for H2 production

General Planning

Technology Selection

- Electrolytic
- Gasification / Pyrolysis
- Thermochemical

- Footprint and Configuration
- Stack / Component Degradation
- Startup and Shutdown
- Ramping Ability
- Design Parameters
- Performance Characteristics

Site Selection Considerations

Separation / Security Considerations

Operational Concepts

Hydrogen Plant Design

- Hydrogen Systems
- Cooling Systems
- Water Systems
- Building Requirements
- Utility Gas Systems
- Electrical Systems
- Structural Requirements

Nuclear Plant Integration

- Thermal Extraction
- Electrical Integration
- Cooling Water Integration
- Controls Integration
- Safety Evaluations

Project Planning

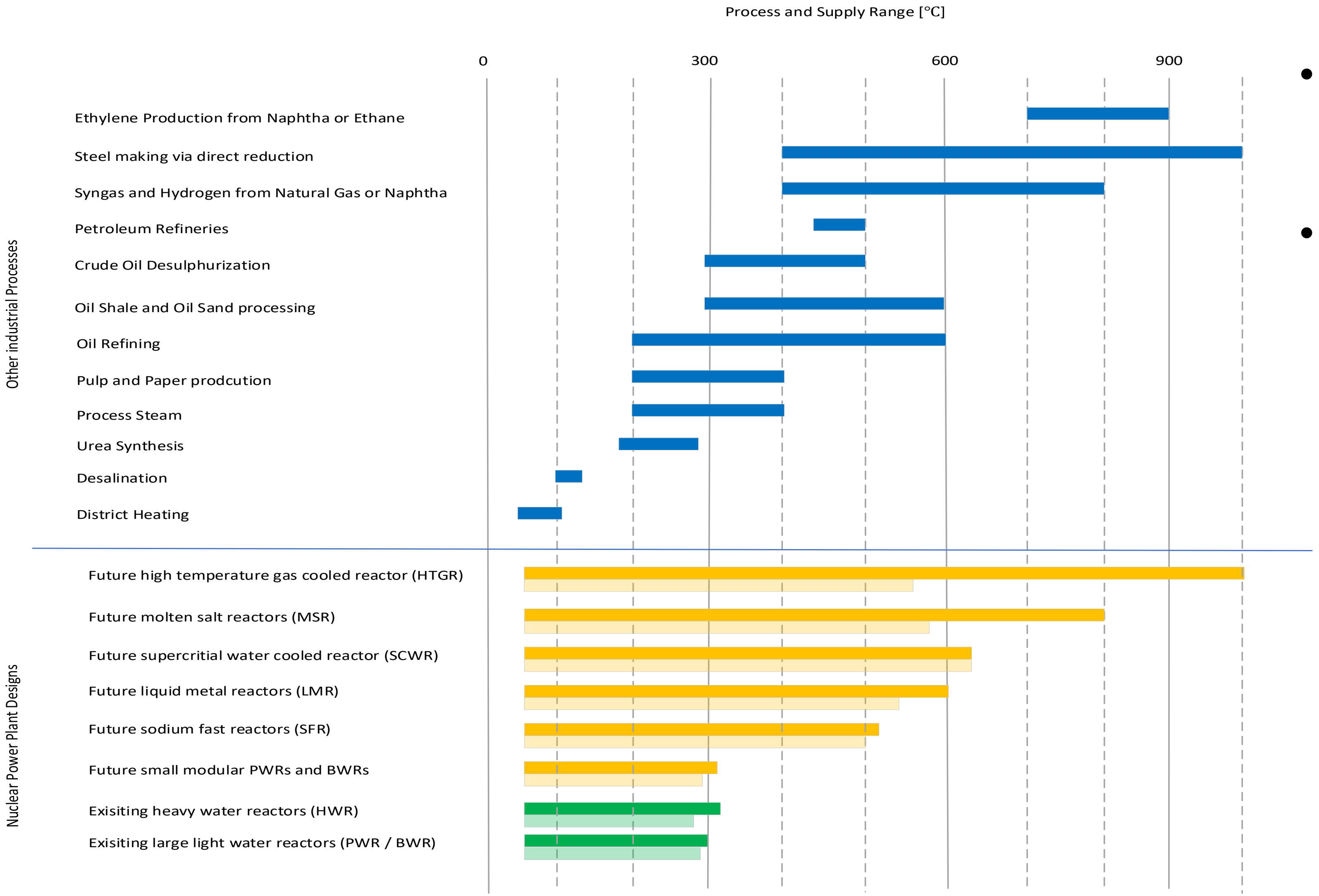
- Schedule Development
- Training
- Codes and Standards
- Maintenance
- Construction
- Licensing and Permitting
- Procurement
- Engineering and Design

ECCN: EAR 99

Options for Delivery of High Temperature Heat from Nuclear Power Plants

3002032244

Match NPP heat with key industrial processes



- Nuclear-Industrial Integration supports global Decarbonization Goals
- Most Temperature requirements can be met with advanced reactors or steam temperature lift.

Legend

- Coolant Temperature Future Reactor
- Steam Temperature Future Reactor
- Coolant Temperature Existing Reactor
- Steam Temperature Existing Reactor

Most LWR designs can benefit from a steam temperature lift to cover a wider range of processes

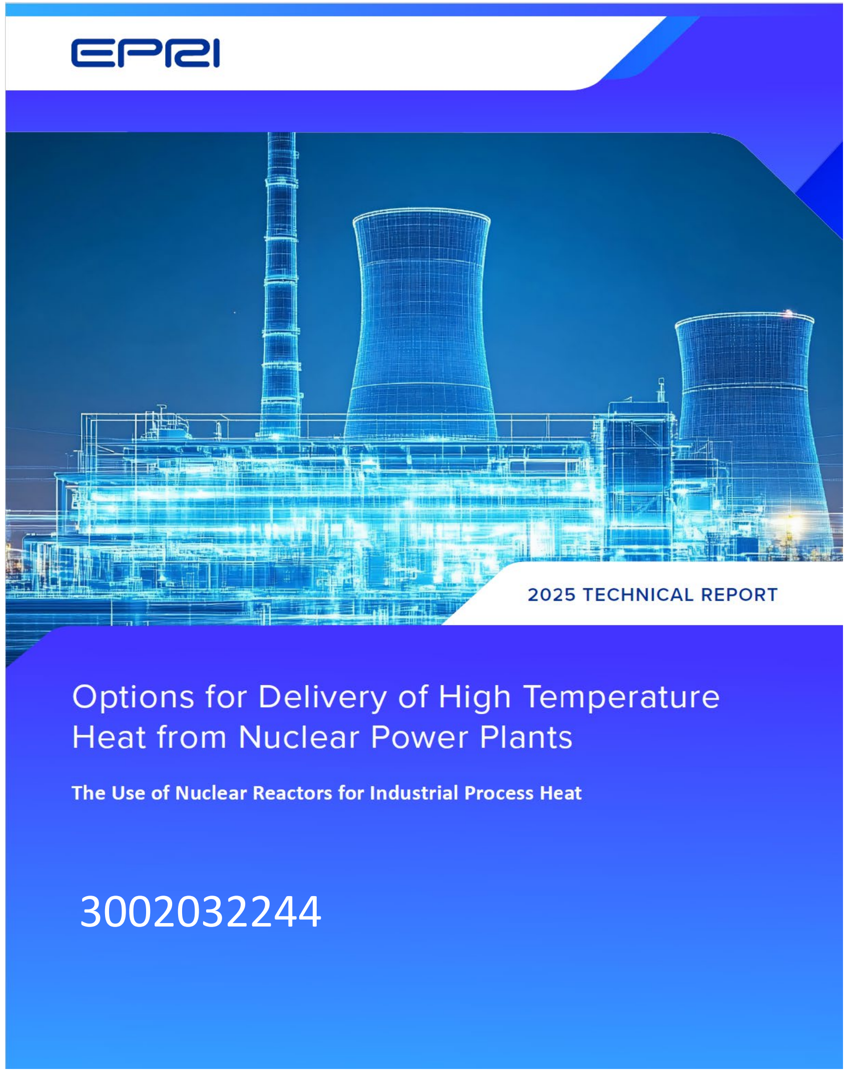
Options for Delivery of High Temperature Heat from Nuclear Power Plants

Outline of Report

- Evaluates **13 combinations of fluid types** in the primary, secondary, and external (from NPP to industrial facility) loops.
  - **Helium, molten salt, high and low temp steam**

- Calculated heat delivery conditions for distances of **2.5 km, 5 km, 10 km, and 20 km between the NPP and industrial facility**

- Rough order of magnitude **equipment costs** (pumps, heat exchangers) for the various arrangements and fluid combinations



Report supports nuclear cogeneration and colocation

Scenarios

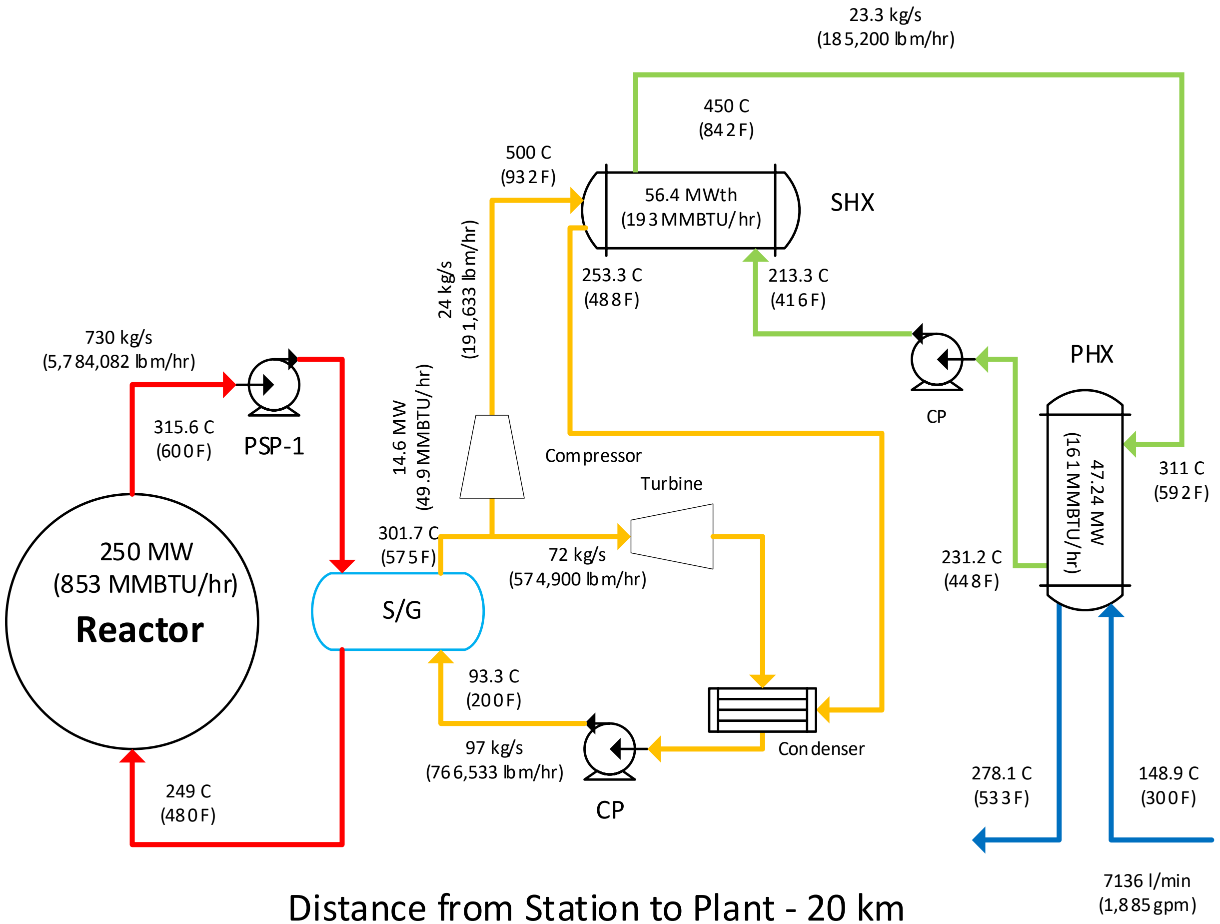
13 Scenarios were considered from these combinations

Configurations	1	2			
Primary Loop Coolant	Helium (HTGR)	Molten Salt (MSR)	Pressurized Water (LWR)		
Internal Heat Transfer Loop	Helium	Molten Salt (MgCl2-KCl-NaC)	Molten Salt (Solar Salt)	Steam (275˚C)	Steam (500˚C, boosted)
External Heat Transfer Loop	Helium	Steam	Molten Salt (MgCl2-KCl-NaC)	Molten Salt (Solar Salt)	
Distance	2.5 km	5 km	10 km	20 km	

Options for Delivery of High Temperature Heat from Nuclear Power Plants

For each of the 13 scenarios we calculated:

- Intermediate, secondary, and process heat exchanger duties
- Pipe sizes
- Heat loss and pressure drop
- Delivered inlet and outlet temperatures
- Heat exchanger estimated cost
- Pumping power estimated cost



Distance from Station to Plant - 20 km

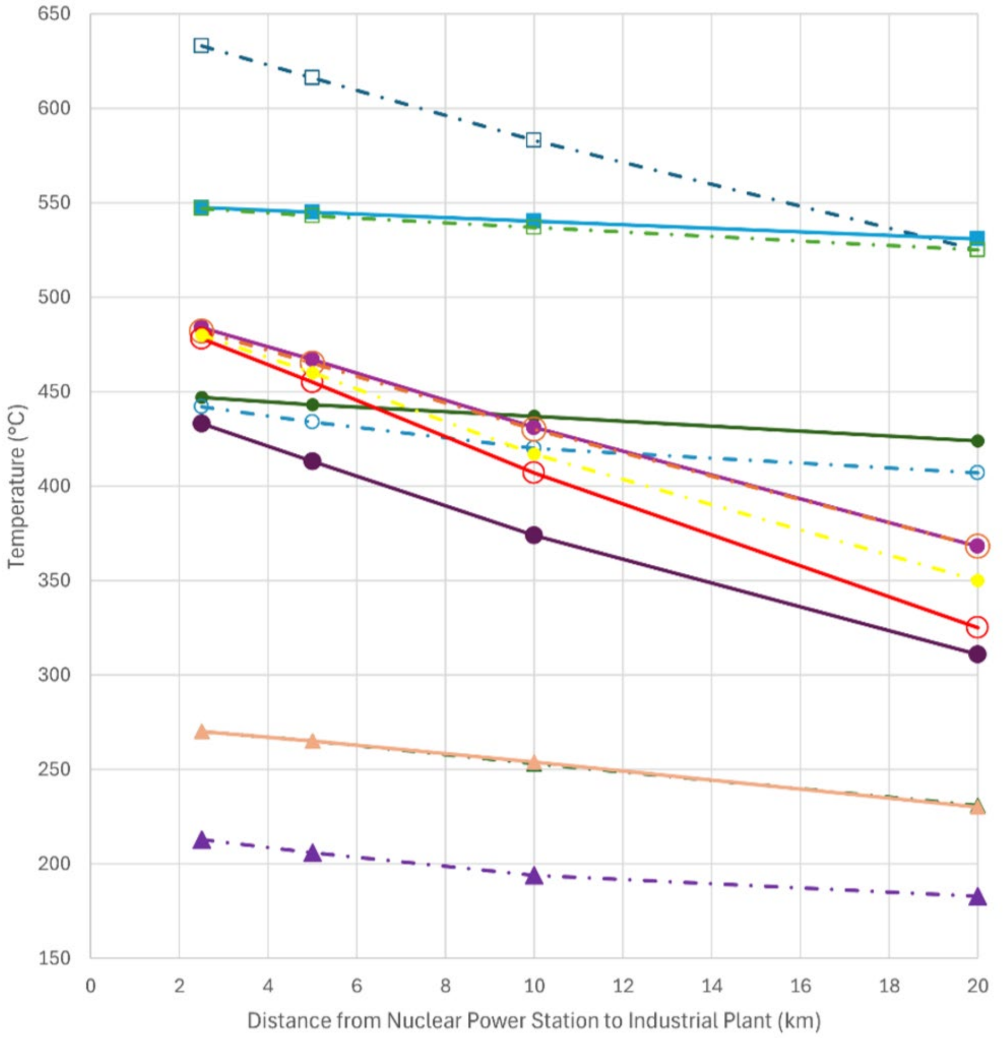
Example: LWR Primary Loop, High Temperature Steam Intermediate Heat Transfer Loop, Steam External Heat Transfer Loop

Options for Delivery of High Temperature Heat from Nuclear Power Plants

Results that can be shared:

- **Steam is a cost-effective heat carrier,** but **results in lower delivery temperatures than molten salt or helium**
- **Molten salt** is an **effective heat carrier over long distances**, but **the cost can be prohibitive and trace heating is required.**
- **Helium can deliver high temperatures,** but **pumping power is costly even over short distances and leakage is a concern.**

Process Heat Exchanger Hot Side Inlet Temperature



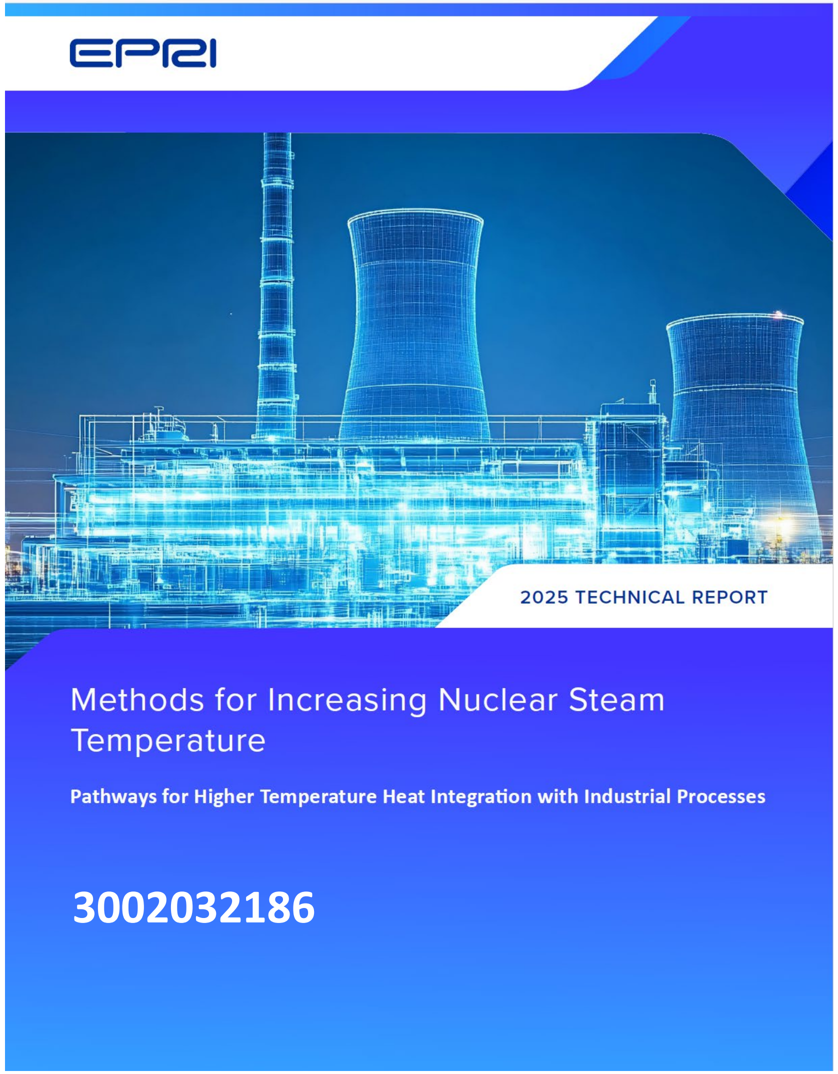
Methods for Boosting Nuclear Integrated Steam Temperature

(3002030534)

Methods for Boosting Nuclear Integrated Steam Temperature

- Evaluates **concepts and considerations to increase available steam temperature from light water based Small Modular Reactors (~300°C) to >500°C for industrial heat end users.**

- Outlines **Process Heat Demands for key industrial processes**:
  - Oil Recovery (via enhanced steam stimulation methods)
  - Hydrogen Production
  - Oil and Chemical Refinery Processes

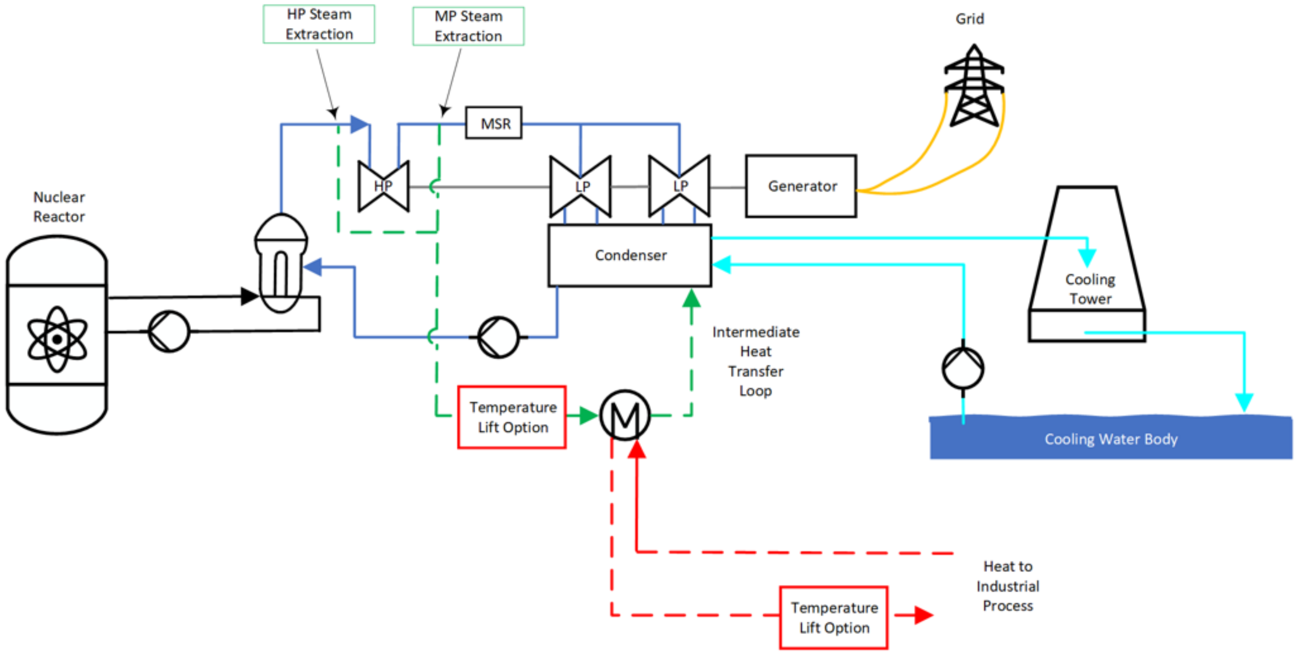


Increasing process heat temperature of light-water based Small Modular Reactors

Methods for Boosting Nuclear Integrated Steam Temperature

- **10% steam mass flow rate** of a representative light water based small modular reactor (LWR-SMR) concept in the **300 MWe range was used as input.**

- Technologies considered to increase steam temperature:
  - **Industrial Boilers**
    - Hydrogen Fueled
    - Syngas Fueled
    - Ammonia Fueled
  - **Electric Heating**
  - **Very-High Temperature Heat Pumps**
  - **Adiabatic Compression**



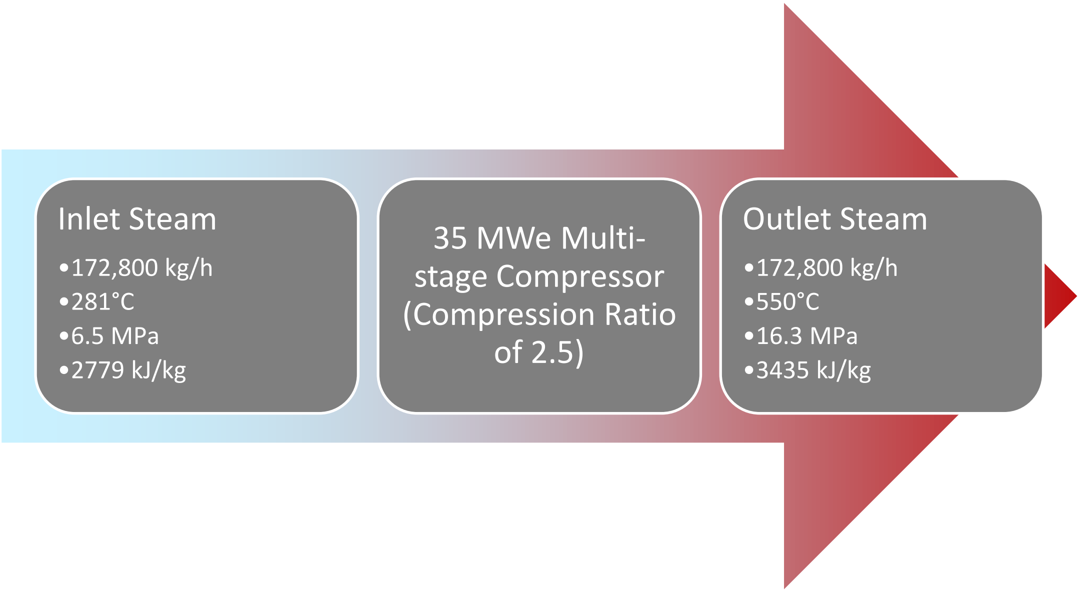
Temperature lift option can be integrated at the plant or end user site

EPRI

Methods for Boosting Nuclear Integrated Steam Temperature

For each technology evaluated:

- **Technical Readiness** (TRL)
- **Technical Feasibility** (advantages / disadvantages)
- **Nuclear Integration**
- **Component Size / Floorspace**
- **Cost Considerations** (Initial & Recurrent)



Parameter	Value
Physical Footprint - Area (m^2 [ft^2])	65-233 (700-2,512)
Capital Cost ($USD)	~35,000,000
Annual Electricity Cost for 8,000 Hours ($USD)	~8,400,000
Annual O&M Cost for 8,000 Hours ($USD)	~700,000

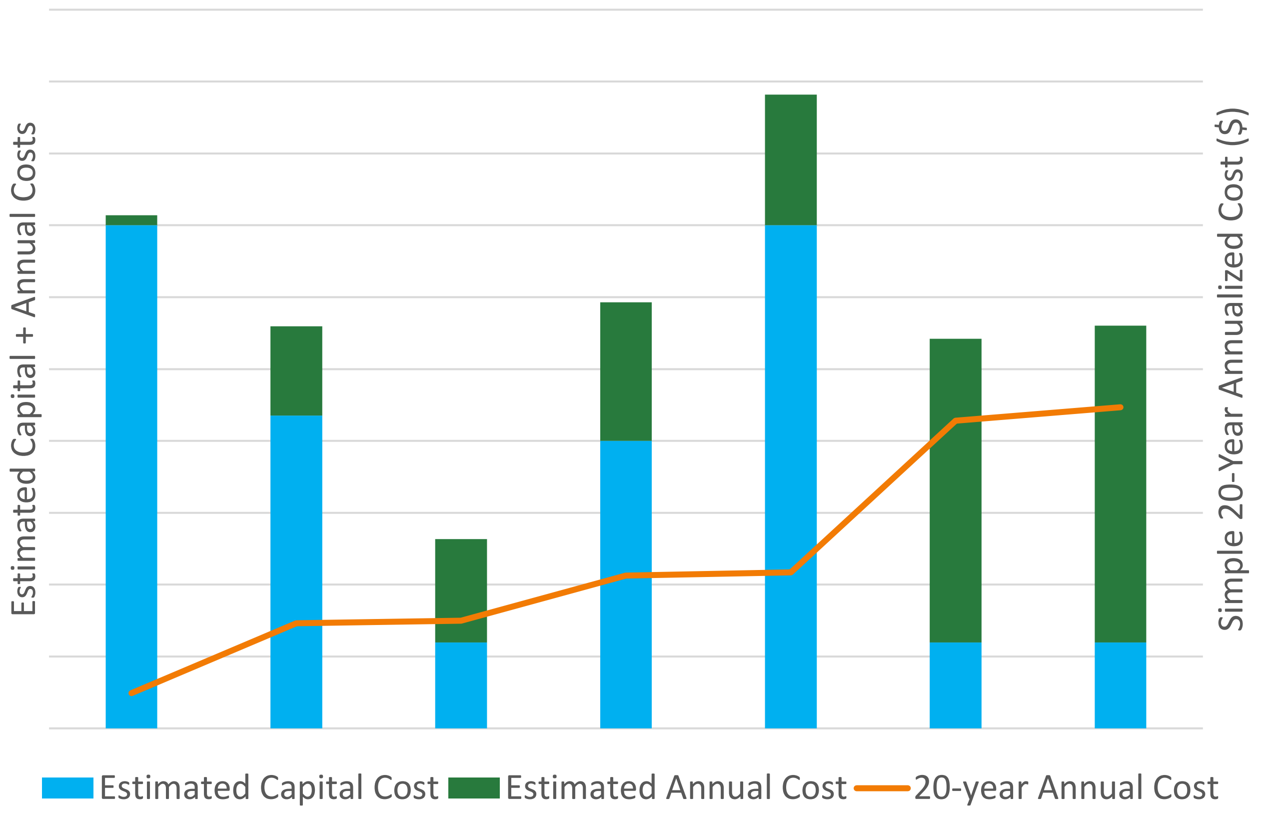
Example: Steam temperature lift with an adiabatic compressor.

Increasing process heat temperature of light-water based Small Modular Reactors

Methods for Boosting Nuclear Integrated Steam Temperature

Results that can be shared:

- **Industrial boilers that burn clean fuel are the most expensive option** due to the relatively high fuel cost.
- **Electric heating provides the highest possible temperature lift** of the options studied, **but it also requires the largest footprint**.
- **VHTHP and adiabatic compressors are at a comparatively lower TRL to industrial boilers / electrical heaters to produce greater than 550°C steam.**
- **Total cost of steam must include cost for steam generation + temperature lift cost.**



Cost Results (values redacted)

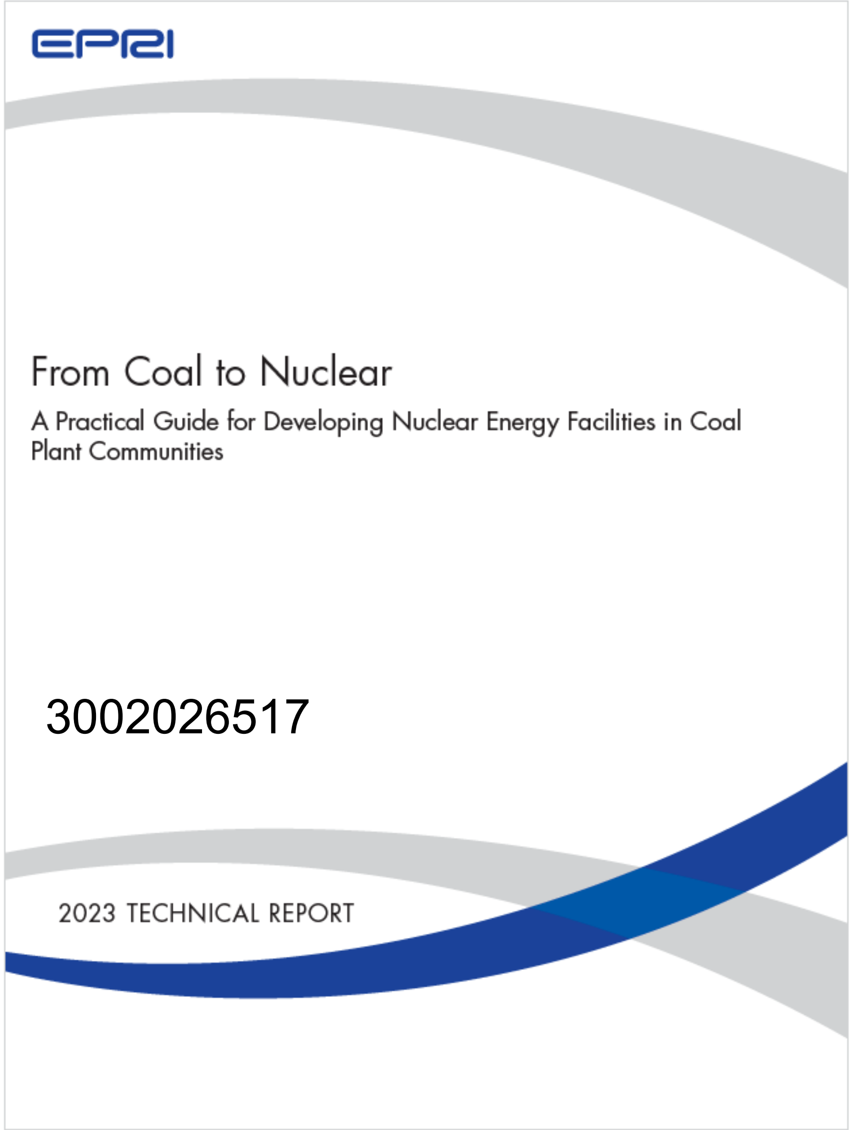
A combination of technologies should be considered for greatest efficiency

Practical Guide for Coal to Nuclear

(3002026517)

From Coal to Nuclear

- The report provides a practical guidance **for the future deployment of a nuclear energy facility on or near an existing coal plant site.**
- Benefits:
  - **Reuse of water use and environmental permits, land, transportation and transmission infrastructure systems**.
  - **Reuse of existing buildings, e.g. warehouse and administrative buildings**
  - **Repurposing of available workforce** (leverage existing skilled labor, e.g. technicians)



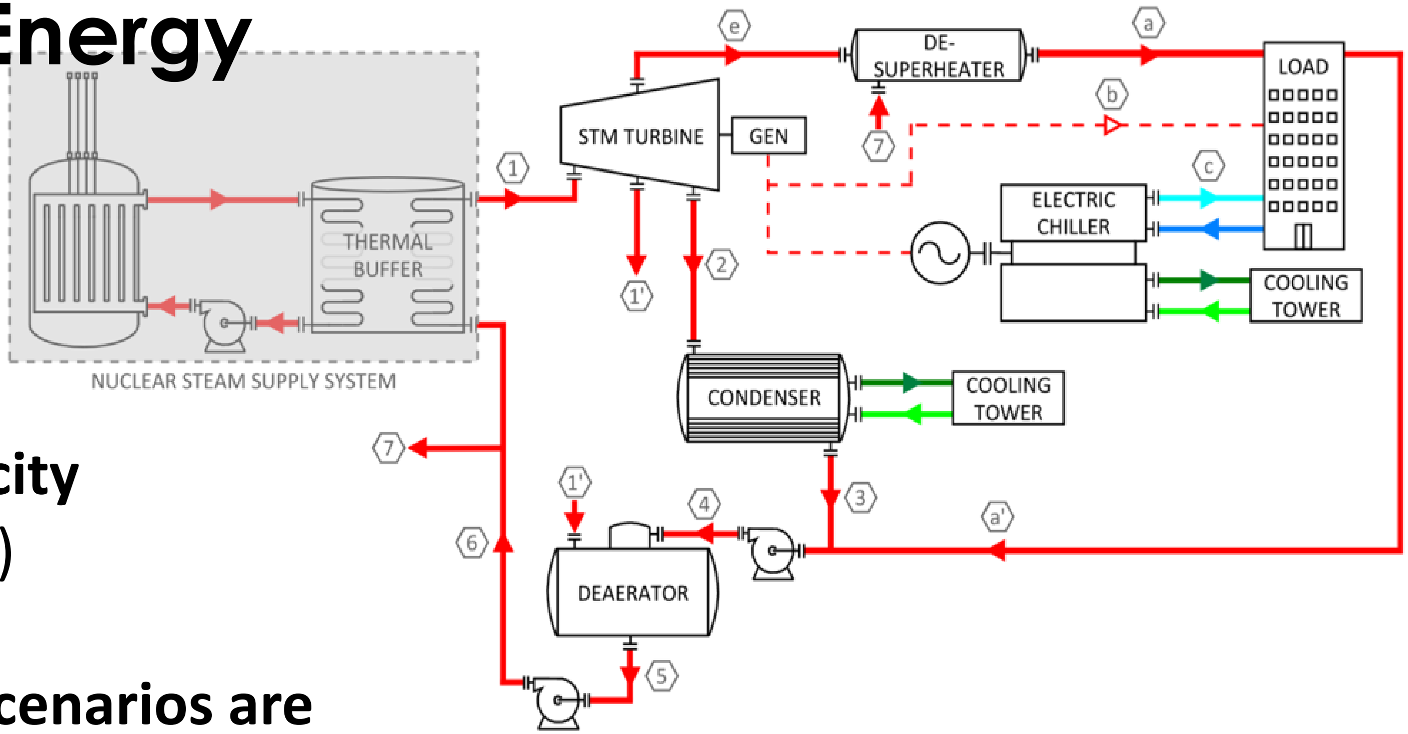
Results in potentially lower cost and faster deployment

Microreactors in District Energy

(3002026568)

Microreactors in District Energy

- Evaluated **microreactors (15 and 50 MW$_{th}$)** for representative campuses.
- Analyzed **heating, cooling, and electricity** production (incl. combinations thereof)
- Out of the 24 analyzed scenarios, **18 scenarios are more cost effective with nuclear,** compared to natural gas, over 30 years accumulated cost; even without incentives and carbon emission penalties.
- Representative **carbon emission penalties from Europe** results in **cost breakeven point in less than 17 years.**



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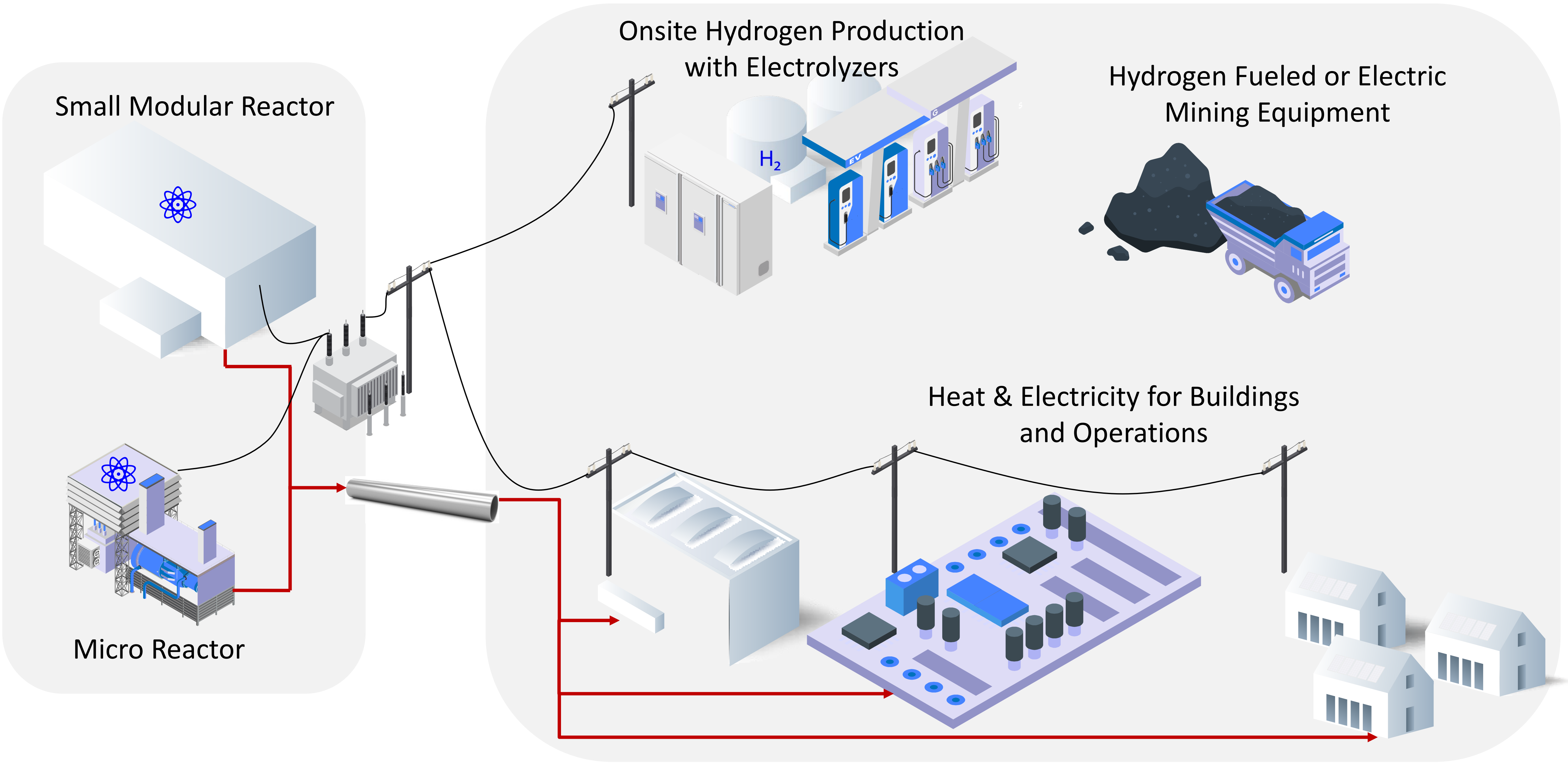
Nuclear for Mining Applications

Nuclear Integration Options for Mining Operations



Research Outlook

Examples of Ongoing Projects

Probabilistic Risk Assessment of Colocated Nuclear Power Plants with Industrial Facilities

Purpose and Scope:

- **Assess new events or hazards that are introduced by colocating NPPs with industrial facilities** (e.g., petrochemical or large electrical consumers)
- Determine if **new events change the magnitude, frequency, or consequences of accident scenarios.**
- Build off existing reports, **add unaccounted transients and expand to larger industries**.
- **Recommend technical and operational solutions to properly model and mitigate potential changes** in accident frequencies and consequences.
- Results can **provide a framework for regulators to make decisions based on realistic risks to a nuclear plant.**

Conceptual Guide for Nuclear Integration with a Chemical Plant

Purpose and Scope:

- Explore the integration of a nuclear reactor with a chemical plant to **provide carbon free heat and electricity.**
- Leverage **Aspen process modeling for component sizing.**
- Provide considerations for **nuclear site selection, physical separation between the NPP and the chemical plant, electrical integration, I&C integration, accident transients, physical and cyber security, licensing & regulatory, and project planning**
- Perform **technoeconomic analysis to support business case.**

Examples of Ongoing Projects

Siting Tool for Energy System Integration

Purpose and Scope:

- Develop a **state-of-art, user friendly tool, for site screening to support nuclear colocation and deployments.**
- Accessible **interactive siting tools and data visualization tools will become increasingly important as non-nuclear industry players enter the market**.
- **Tool will include EPRI research data, results, and methodologies in combination with public geographic information system** (GIS) data, plus industry specific **data layers.**
- **Incorporate an AI framework.**

Develop Industry Standard for Levelized Cost of Heat

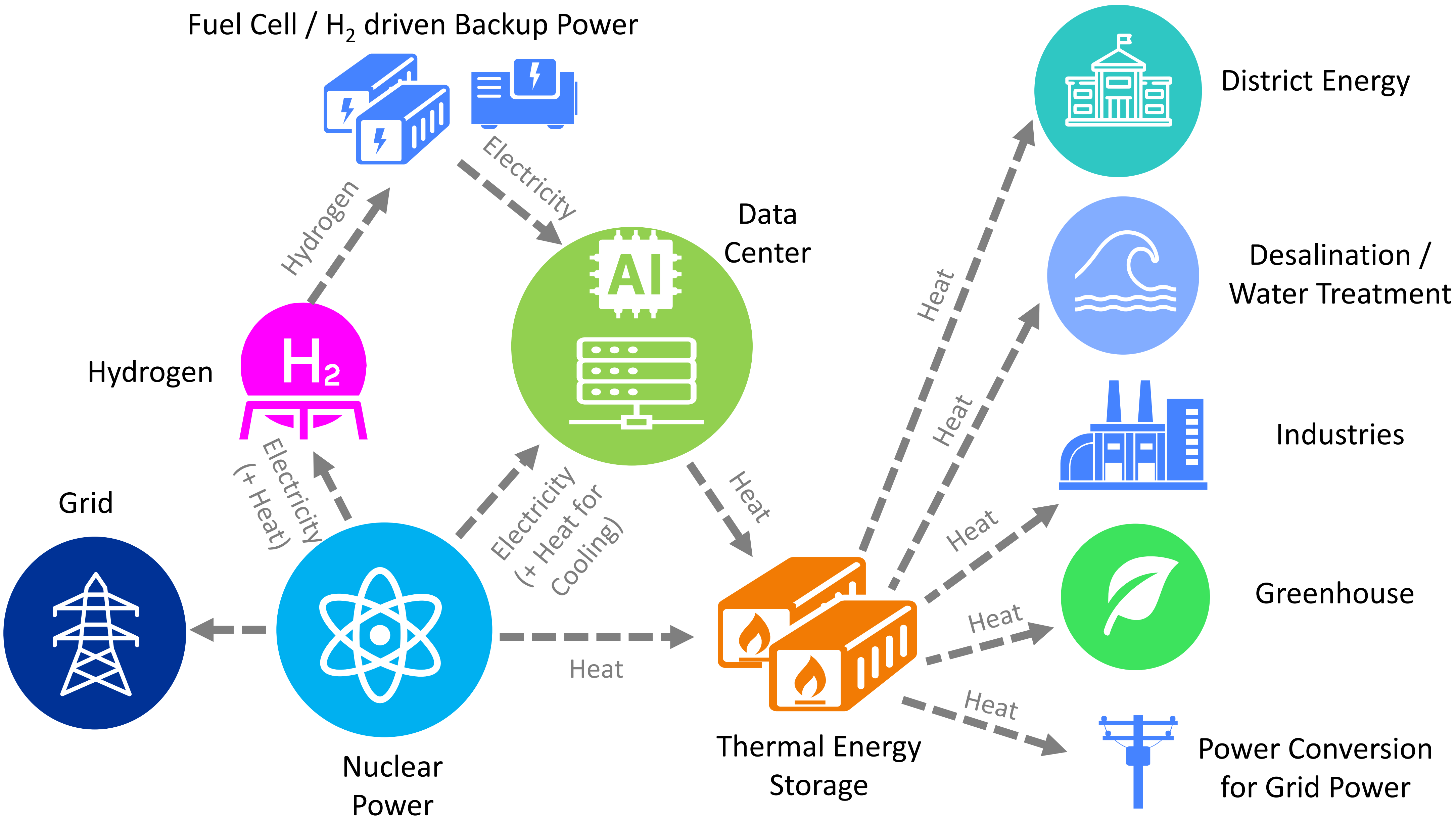
Purpose and Scope:

- There is **no standardized way to calculate the value of the heat produced by the power plant and the cost to transport it to the end user**.
- **Difficult to compare the cost of nuclear energy to other conventional heat generating technologies** (such as other fossil fuel boilers).
- **Develop a methodology for calculating the levelized cost of heat including considerations such as distance between the plant and the end user, heat quality, and heat quantity**.
- Perform a **sensitivity analysis to estimate the impacts of each variable** on the final cost.

We are leveraging the depths of EPRI and our Collaboration Partners

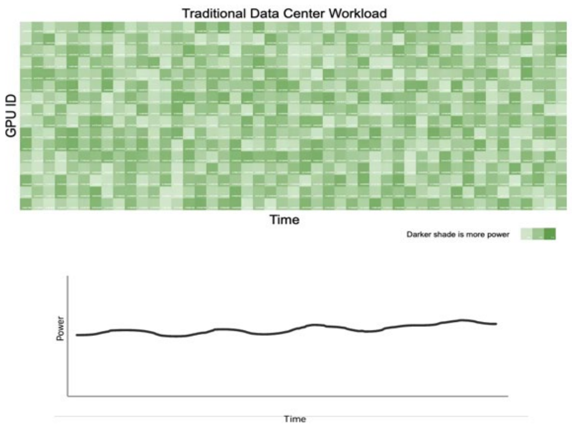
Nuclear – Data Center Integration

Vision: Integration Concepts – Leverage Synergies

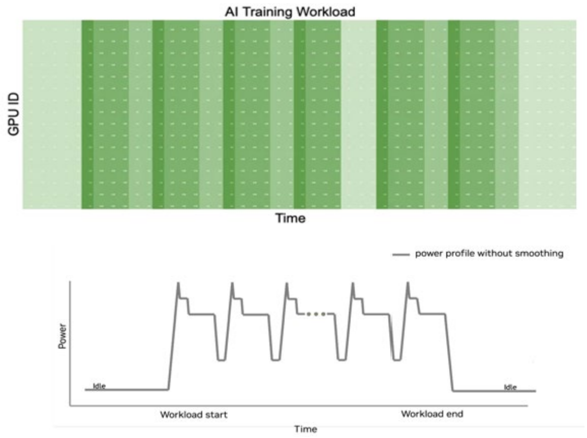


Challenges with AI Training and Fluctuating Loads

- Power spikes are **caused by GPU synchronized computation demand**.
- These shapes can be **different for different entities** and depends on how their models are trained.
- These **can trigger unwanted oscillations as well as flicker / power quality issues**.



** Reference: How New GB300 NVL72 Features Provide Steady Power for AI – Nvidia Technical Blog*



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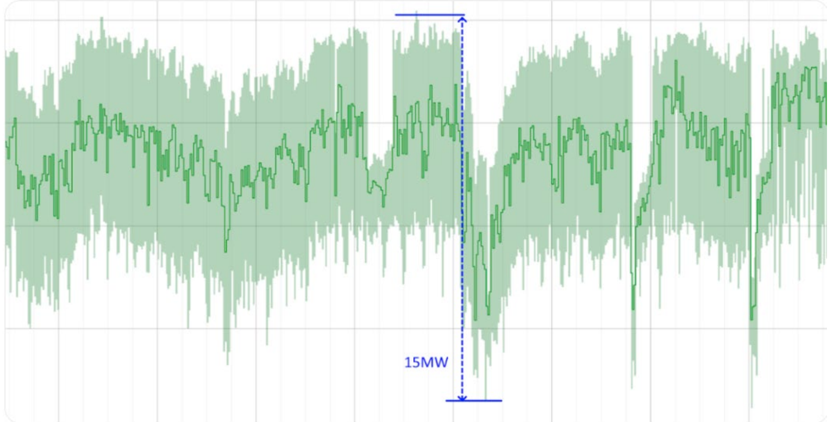
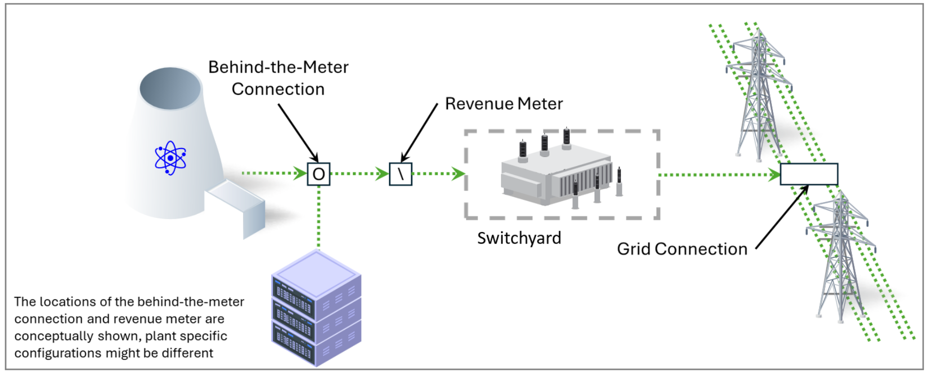
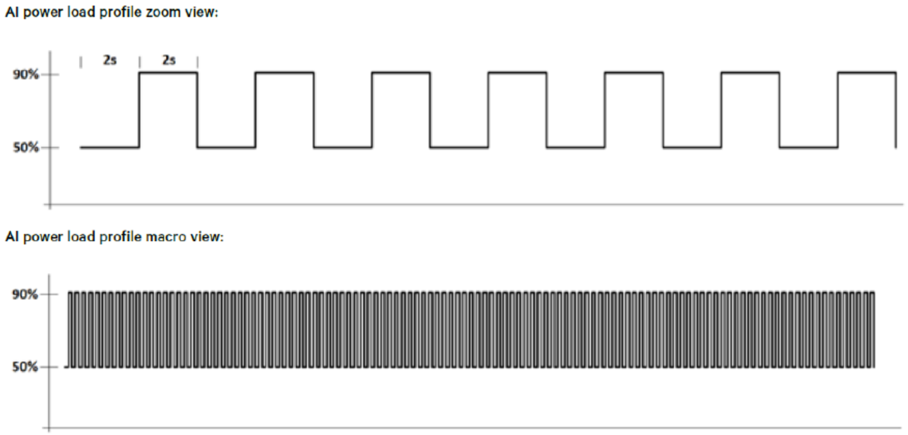


* Reference: Mitigating power and thermal fluctuations in ML infrastructure | Google Cloud Blog

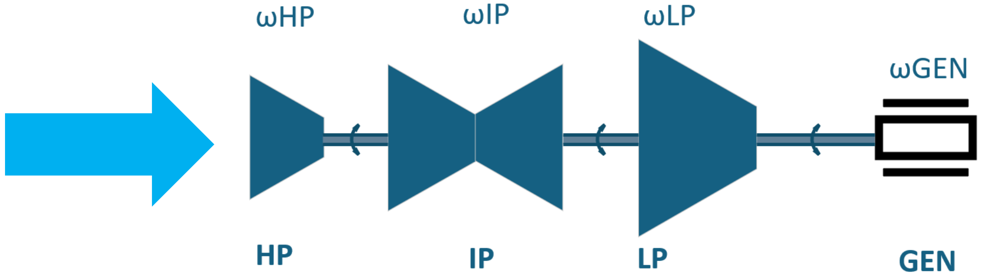
Known and measured load fluctuations

Generator Resonance Risks caused by AI Fluctuations





Example AI training load



Steam turbine torsional model

- Conventional generators have torsional modes[1)] of oscillations in the 5-55 Hz range (oscillations between different turbine sections and the generator).
- **AI training / loads create pulsating loads which can excite these torsional modes.**
- Over an **extended period, this can cause fatigue and even damage the turbine shaft.**

Note [1)]: A torsional mode is a specific, natural, angular vibration pattern that occurs around the axis of a rotating shaft or structural component

Guide for Co-locating Data Centers with Nuclear Power

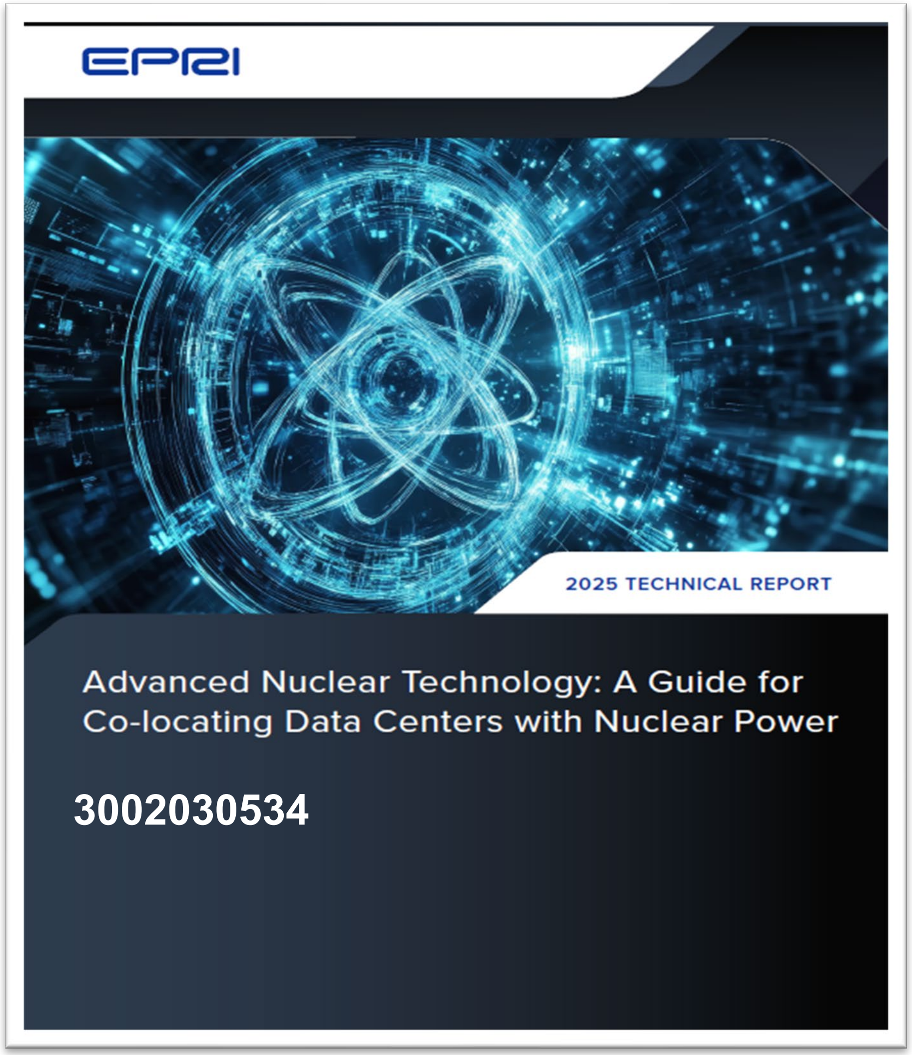
(3002030534)

Guide for Co-locating Data Centers with Nuclear Power

Key Areas addressed by this Guide

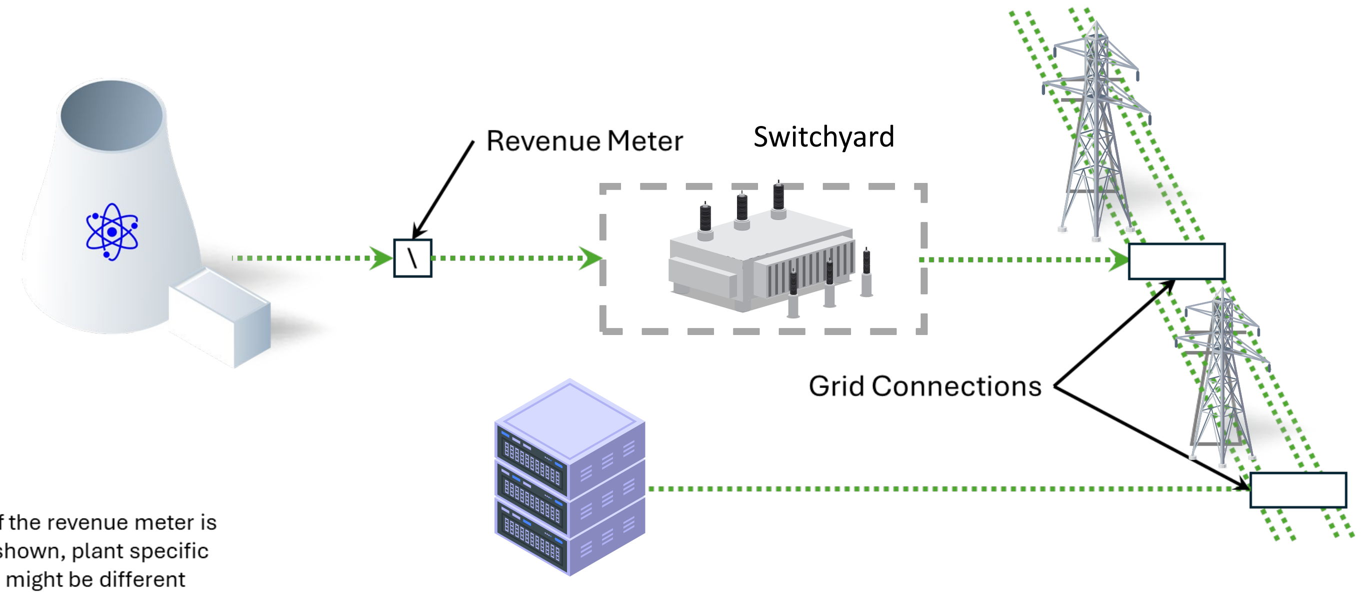
- Developed with **input from the Nuclear Energy Institute, Data Center Companies, and EPRI SMEs**
- **Practical, logistical, and safety topics** that must be considered when developing **new nuclear assets** or **using existing nuclear assets** to power a data center.
- Provide guidance for **grid connection, a behind-the-meter connection, or direct connection.**
- **Regulatory and Community Engagement.**

- Guide is **free to the public.**



Your Starting Point for Nuclear Co-location

Option1: Connect to the Grid

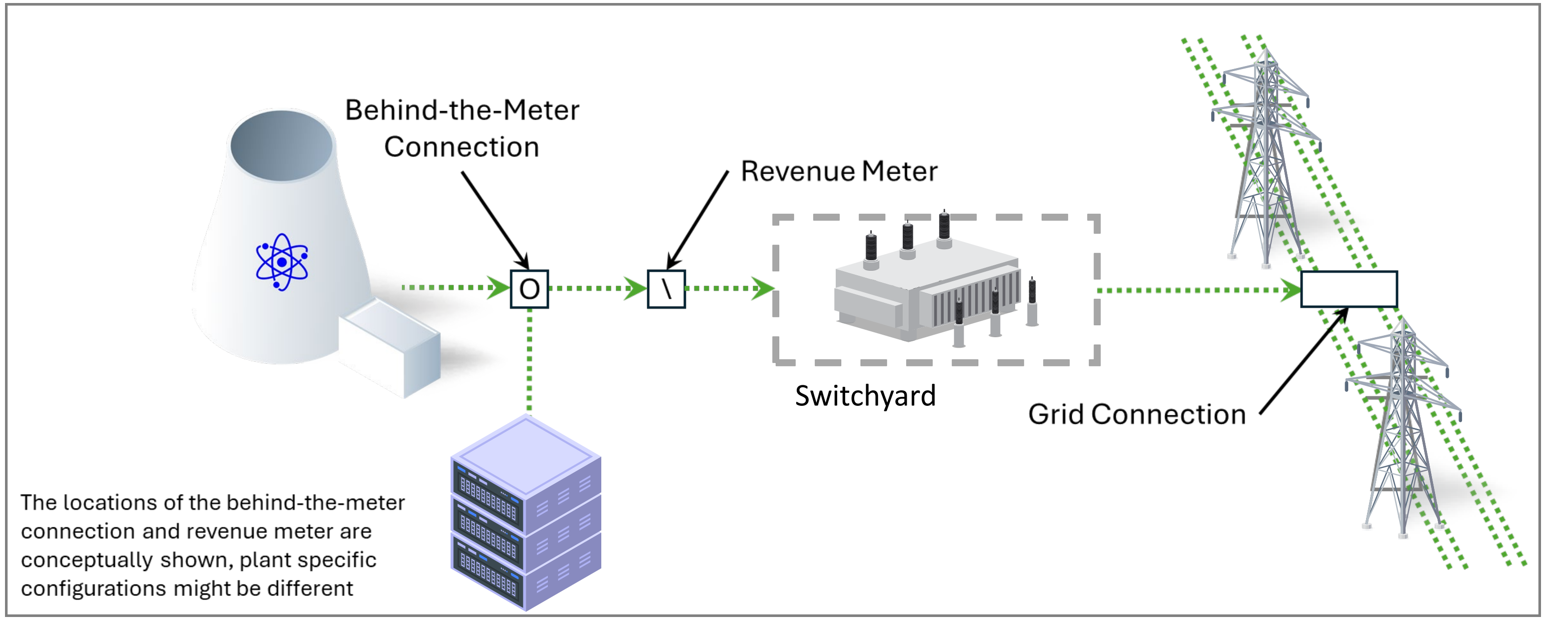


The location of the revenue meter is conceptually shown, plant specific configurations might be different

Advantages	Disadvantages
• Access to firm base load power • Inertia provides high quality power • High-capacity factors for reliable power • Nuclear is non-carbon emitting • Power Purchase Agreements may be available	• Requires new transmission and distribution • Requires new generation • Fossil power generation emits greenhouse gases

Connecting to the grid provides maximum of flexibility for future growth

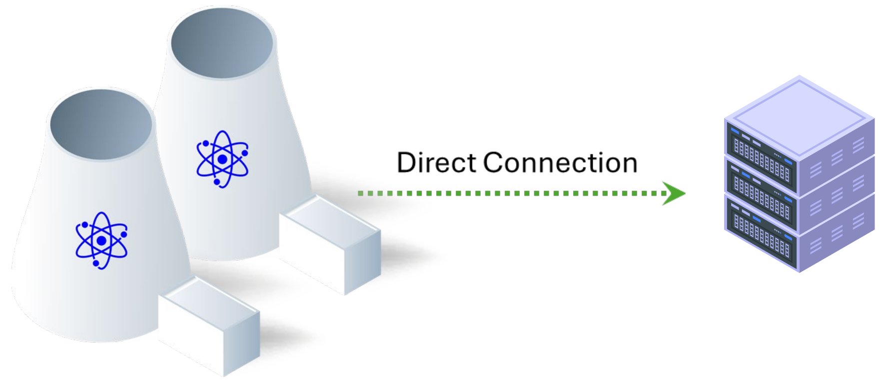
Option 2: Behind-the-Meter



Advantages	Disadvantages
• Minimizes new transmission and distribution • May reduce electricity costs for data centers • Option for greenfield and new generation that is not bound by existing Interconnection Agreement • Grid efficiency improves when large loads are located closer to its power supply	• Restricts possible sites for data centers • Limited to existing nuclear plants for now • Limited by current regulations • May negatively impact the grid or the nuclear plant due to transients

Behind-the-meter connections can provide cost reductions, but there are challenges

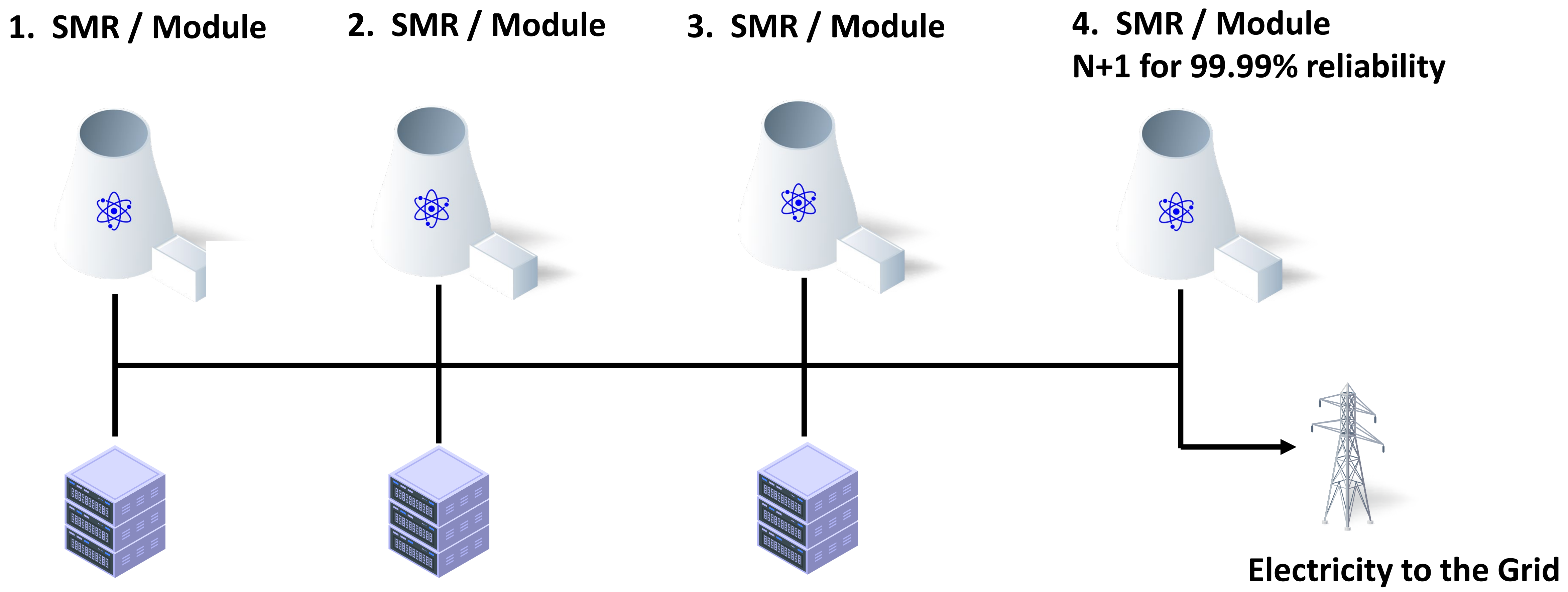
Option 3: Direct connection (Microgrid or Island Mode)



Advantages	Disadvantages
• Minimizes new transmission and distribution • Independent from grid operation • Could be an option in isolated areas	• Load rejection and load flicker can impact the nuclear plant • Requires backup capability • Limited redundancy • Risk is transferred from the grid to the NPP to ensure supply certainty

A direct connection increases the challenges but may be needed in some scenarios

Modular Construction Approach (without Grid Support)



Assumed capacity factor for each nuclear plant is 90%, *based on existing NPP operational experience*. $R_{system} = 1-(1-R)^n$

Build out the data centers as new reactors become available. Grid supply increases reliability.

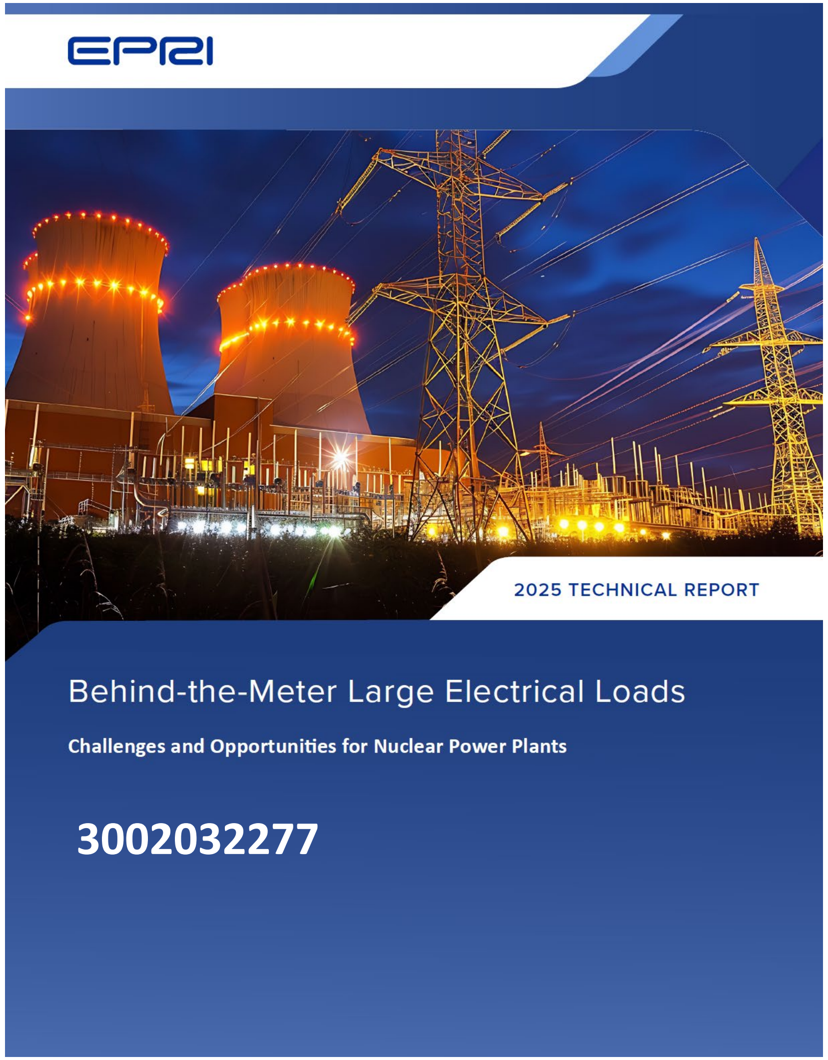
Behind-the-Meter Large Electrical Loads:

(3002032277)

Behind-the-Meter Large Electrical Loads

Outline of Report

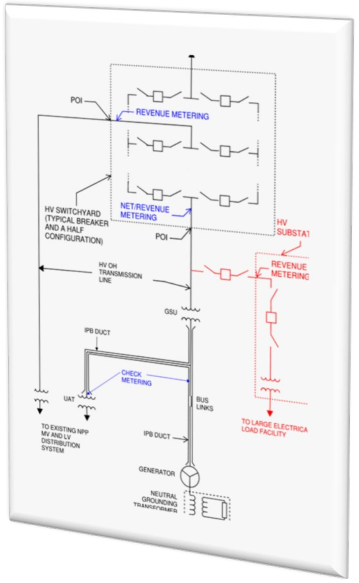
- Provides **concepts and considerations for adding a behind-the-meter large electrical load** to Nuclear Power Plants.
- Collaboration from **Utilities, INPO, and Engineering Architects**
- Concepts for **existing and new nuclear**
- **Modifications to physical arrangements and protection systems.**
- **Legal and regulatory considerations incl.** FERC and Nuclear Regulatory Commission (NRC).
- **Lists business and financial considerations.**



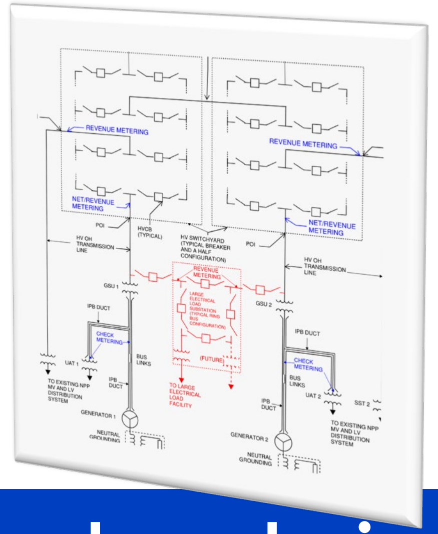
Critical information for electrical engineers and new nuclear designers

Behind-the-Meter Large Electrical Loads

Option: HV Tie-in Connection and HV Revenue Metering, *Single Generator*



Option: HV Tie-in Connection and HV Revenue Metering, *Two Generators*



Content examples

- Recommended Electrical Interconnections for
  - **High Voltage (HV) Tie-in Connection and HV Revenue Metering, Singe and Two Generators**
  - **HV Tie-in Connection and Medium Voltage Revenue Metering**
- **Impact on the available short circuit current**.
- Physical **site and cyber security**.
- Additional **monitoring, serviceability, and maintenance of HV and interconnect equipment**.
- New and existing **modifications to protective relaying and metering systems**.
- **Expected Steady State and Transient Impacts** (Stability, Short Circuit and Arc Flash, Harmonics, Protective Device Coordination Analysis)
- **Impact Analysis of Protection System, Load Rejection, NERC standards, 50.59, Interconnection Agreements, and more…**

Critical information for electrical engineers and new nuclear designers

Research Outlook

Nuclear – Data Center Integration

Examples of Ongoing Projects

Thermal Energy Storage System for Nuclear Integrated Data Centers

Purpose and Scope:

- Most Data Centers **reject heat** generated from the IT load to the environment by mechanical cooling equipment **without economic use**.
- **Several European and regional initiatives** exist today that **encourage or require waste heat utilization of data centers**.
- Goal is to explore the opportunities and challenges of **capturing otherwise wasted heat** from data centers, **coupled with a Thermal Energy Storage (TES) system and nuclear heat topping**, to provide process **heat to industrial processes**.

Guide for Nuclear Power Plant Integration with Data Centers

Purpose and Scope:

- Develop a **practical and understandable guide** that lists and describes options, concepts, and considerations **for integration between the NPPs and DCs**.
- The **NPPs** to be considered **will include all sizes** including large light water, small modular, and micro reactors.
- Consider **load follow limitations** and options to **account for AI load demands**.
- **Integrated Cooling, TES, Backup and Construction Schedule** concepts
- **Staff Optimization** and **Siting Considerations**

We are leveraging the depths of EPRI and our Collaboration Partners

Examples of Ongoing Projects

Probabilistic Risk Assessment of Colocated Nuclear Power Plants with Industrial Facilities

Purpose and Scope:

- **Assess new events or hazards that are introduced by colocating NPPs with industrial facilities** (e.g., petrochemical or large electrical consumers)
- Determine if **new events change the magnitude, frequency, or consequences of accident scenarios.**
- Build off existing reports, **add unaccounted transients and expand to larger industries**.
- **Recommend technical and operational solutions to properly model and mitigate potential changes** in accident frequencies and consequences.
- Results can **provide a framework for regulators to make decisions based on realistic risks to a nuclear plant.**

Siting Tool for Energy System Integration

Purpose and Scope:

- Develop a **state-of-art, user friendly tool, for site screening to support nuclear colocation and deployments.**
- Accessible **interactive siting tools and data visualization tools will become increasingly important as non-nuclear industry players enter the market**.
- **Tool will include EPRI research data, results, and methodologies in combination with public geographic information system** (GIS) data, plus industry specific **data layers for data centers and other industries.**
- **Incorporate an AI framework.**

Examples of Ongoing Projects

Impact assessment of Data Center driven Load Bursts on direct electrical connections with NPPs

Purpose and Scope:

- **Direct electrical integration** of data centers with NPPs **remains an option** for existing and new construction NPPs.
- **Proactively identify and mitigate potential power quality challenges** associated with direct connections between data centers and NPPs.
- **Develop and recommend technical and operational solutions** to reduce or eliminate negative impacts on power quality and NPP operation.
- **Develop** framework for **microgrids.**

Options for NPP and Data Center Integrated Cooling Concepts

Purpose and Scope:

- **Colocation of NPPs with large IT load data centers can strain available cooling water sources** and ultimate heat sinks such as rivers, lakes, or oceans.
- Evaluate the **feasibility, efficiency, and potential challenges & benefits of shared ultimate heat sink and cooling systems, structure, and components** between a new NPP and a large-scale Data Center.
- **Operational (normal operation and outages), regulatory, and financial aspects** will be considered.

Reach out if you are interested in supporting future work

Upcoming NBE Workshops

Nuclear Energy for Data Centers – August 18-19 in Charlotte, NC

Nuclear Energy for Industrial Applications – Sep 29-30 in Houston, TX

Two days of critical information from EPRI SME's, industrial representatives and historically 70+ participants

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