

# HUNGARIAN BATTERY ASSOCIATION

**Korea-Hungary Battery Cooperation Centre (KHBCC) 2025**

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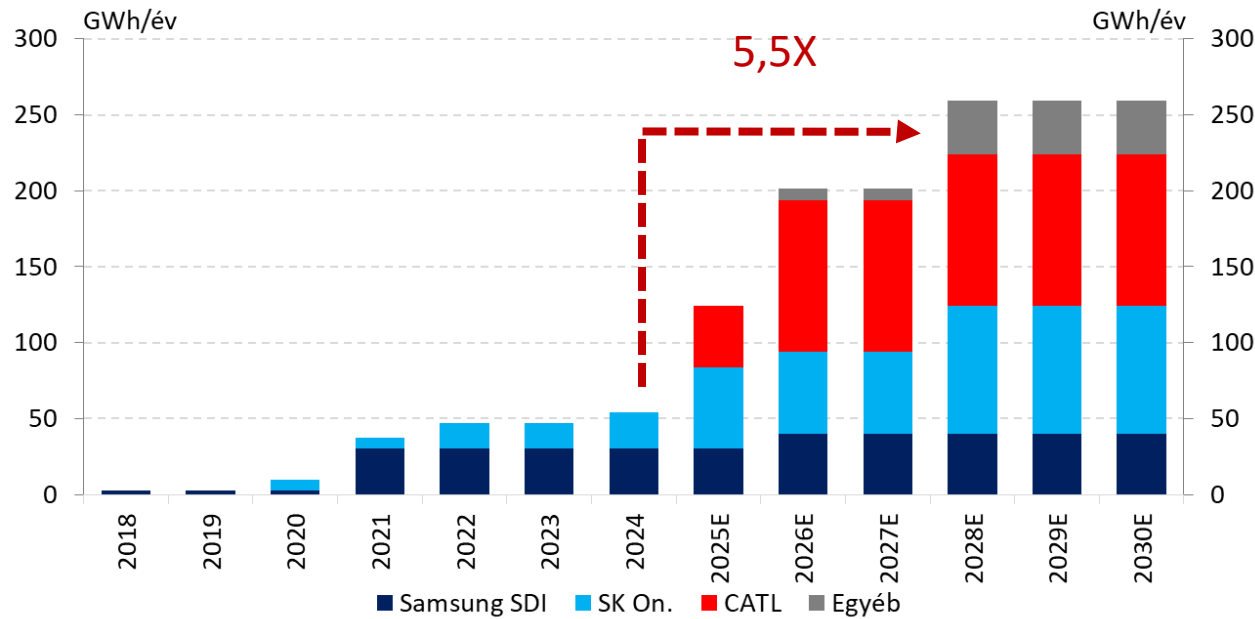
**Hungarian Battery Day**

**HUNGEXPO**

**Budapest, 6<sup>th</sup> November 2024**

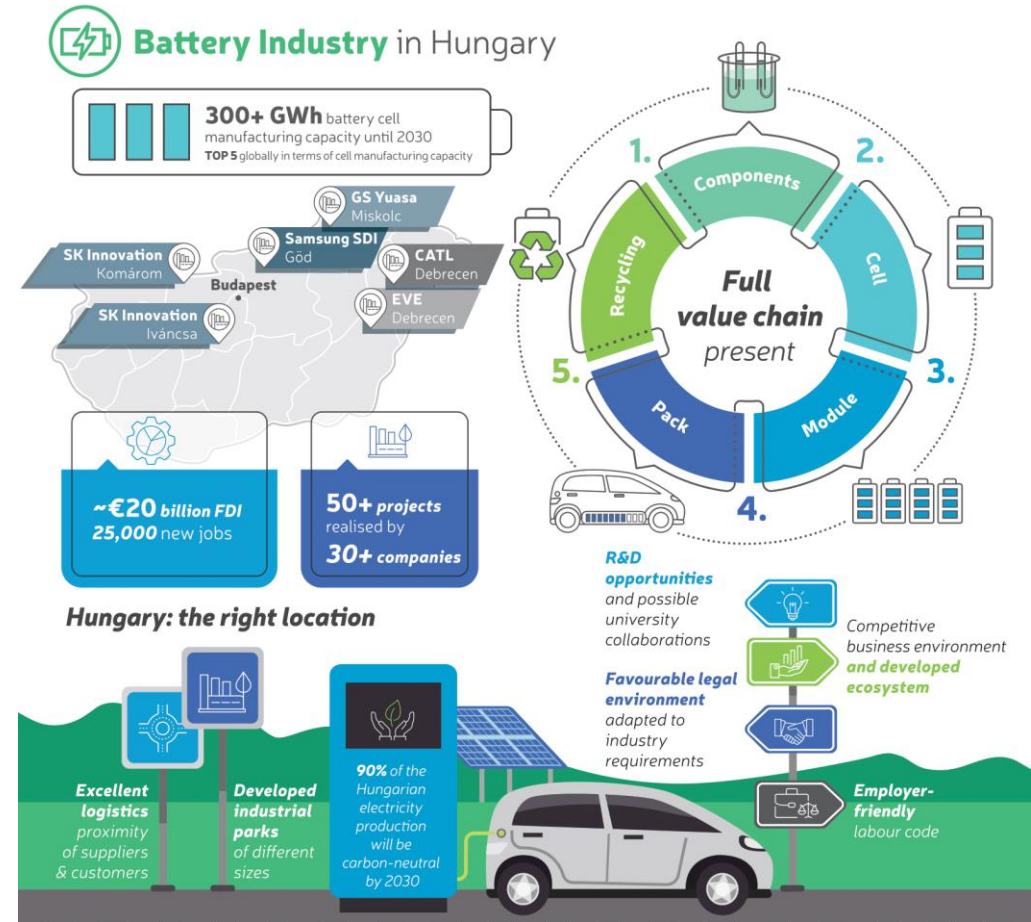


# Battery industry is a priority for Hungary's economic development and competitiveness policy



Battery cell production capacity outlook for Hungary, GWh/year

>90% of production is exported



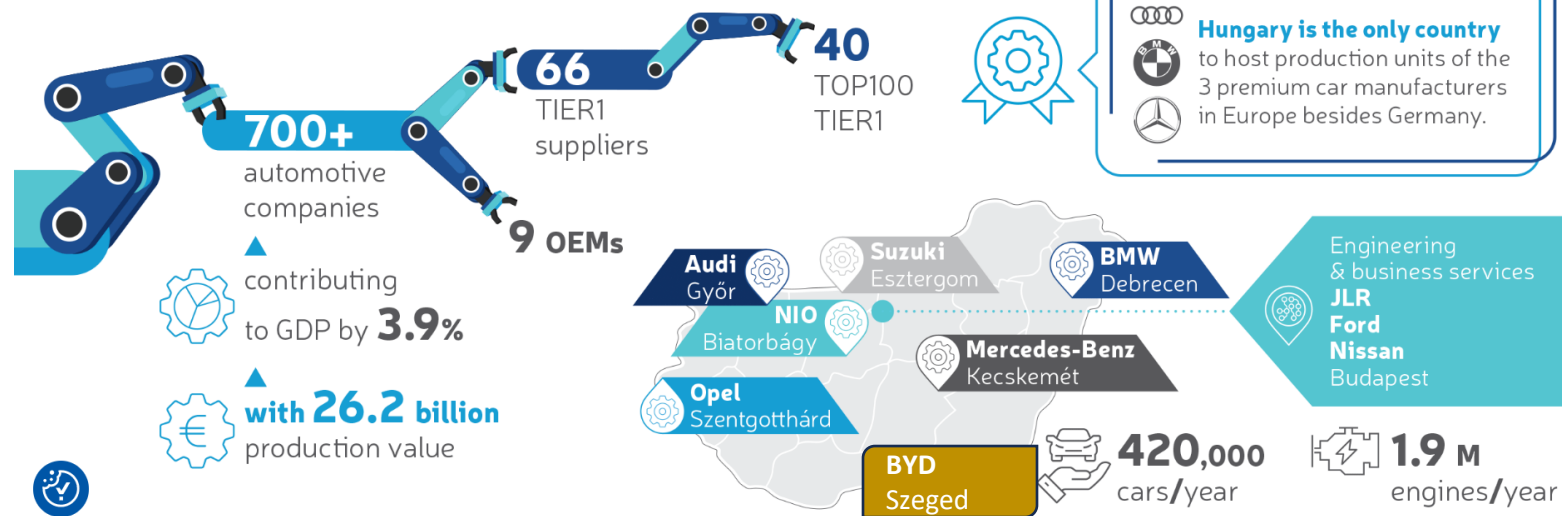
Source: HIPA, 2024

# Battery industry supports the transformation of the Hungarian automotive industry

- ✓ Vehicle manufacturing: 6% of GDP
- ✓ Suppliers: additional 8-9% of GDP
- ✓ 30% of industrial output
- ✓ 90% of production ends up in European super-brands



## Automotive Industry in Hungary



### Hungary is pioneering the new era of mobility e-mobility & autonomous driving



- Copper foil
- Aluminium jack
- Separator films
- Electrolyte
- Recycling
- Aluminium anode foil
- Battery modules
- Battery cells

- Components for electric drivetrain systems
- E-engine
- Semiconductors
- Modules for inverters
- Electric drives
- High-tech electronics products

- ADAS
- AI
- V2V
- V2X
- Public road testing

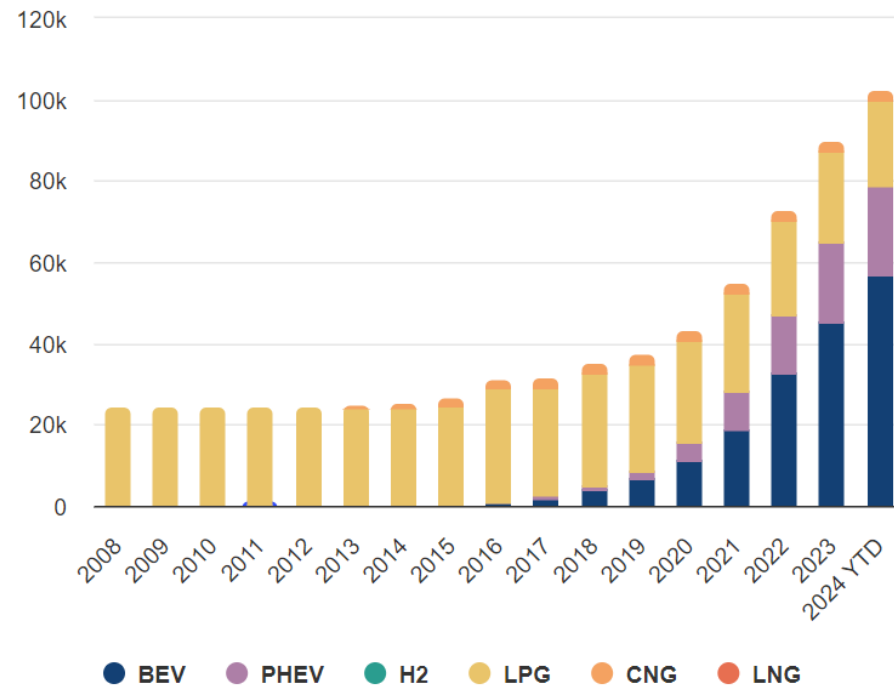


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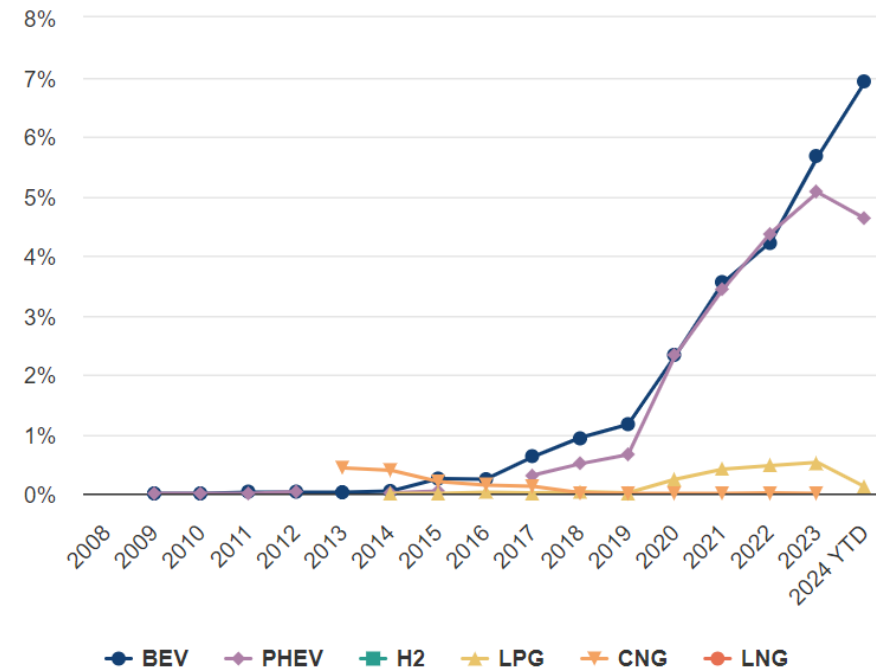
# Hungarian vehicle park transformation favours BEV

- Vehicle park transformation favours BEV – BEV/capita is highest in CEE region; fast growth in 2024 new BEV registrations
  - Specific support programs for AF passenger cars and buses; highway toll discount for AF trucks
  - Charging infrastructure development is lagging behind

AF fleet (M1)

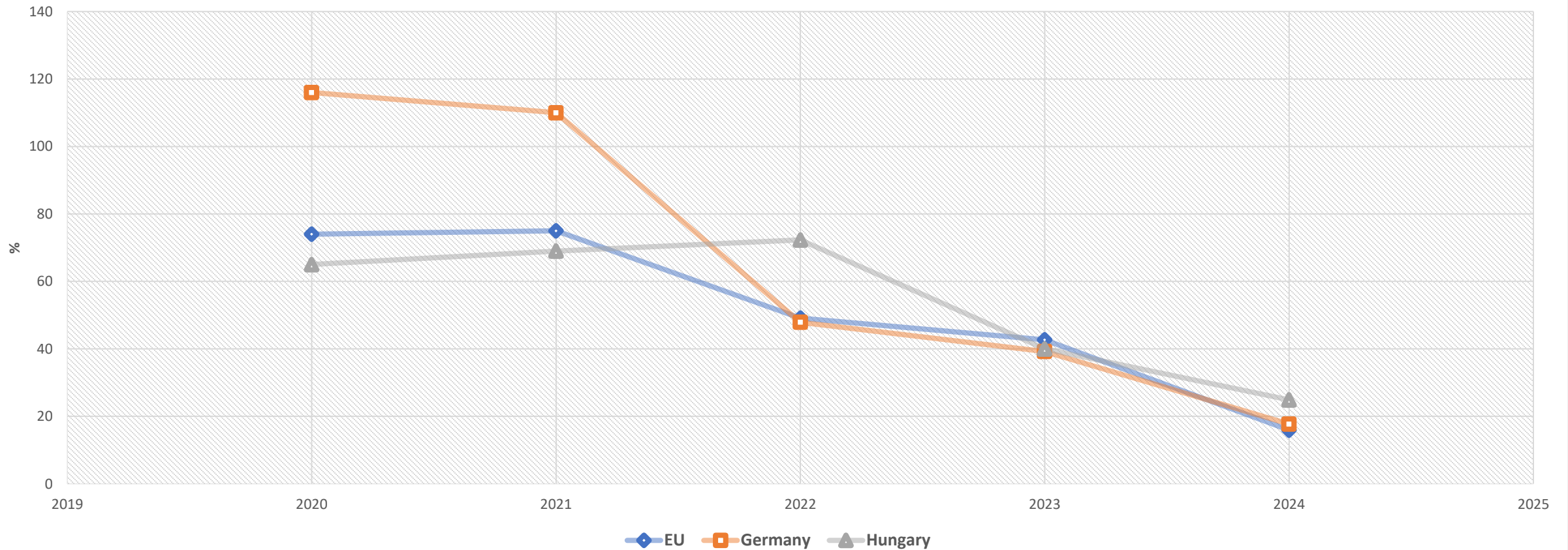


AF market share of total registrations (M1)



# Growth rate of Hungarian BEV fleet above EU average in 2022-24

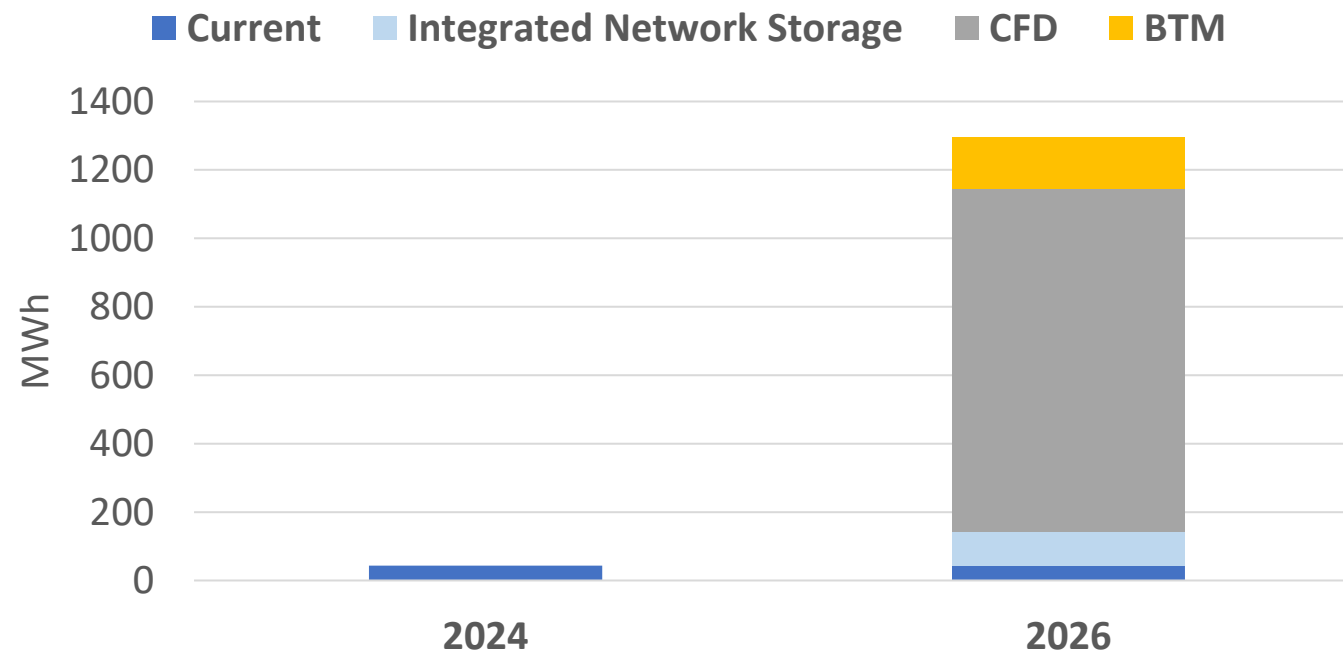
Year-on-year BEV fleet growth rate of passenger cars (M1) and vans (N1)



# Hungarian BESS market outlook: 30x growth in 3 years!

- Upcoming investment boom in grid scale energy storage
  - Response to dynamic renewable electricity generation penetration – 12 GW PV + 1GW wind by 2030
  - Supported by a CAPEX subsidy (EUR 156m) + Contract for Difference tender (56 winning project)
- V2G solutions could multiply available flexibility services for the grid by utilizing mobile storage in EVs

## Grid Storage Capacity Outlook in Hungary

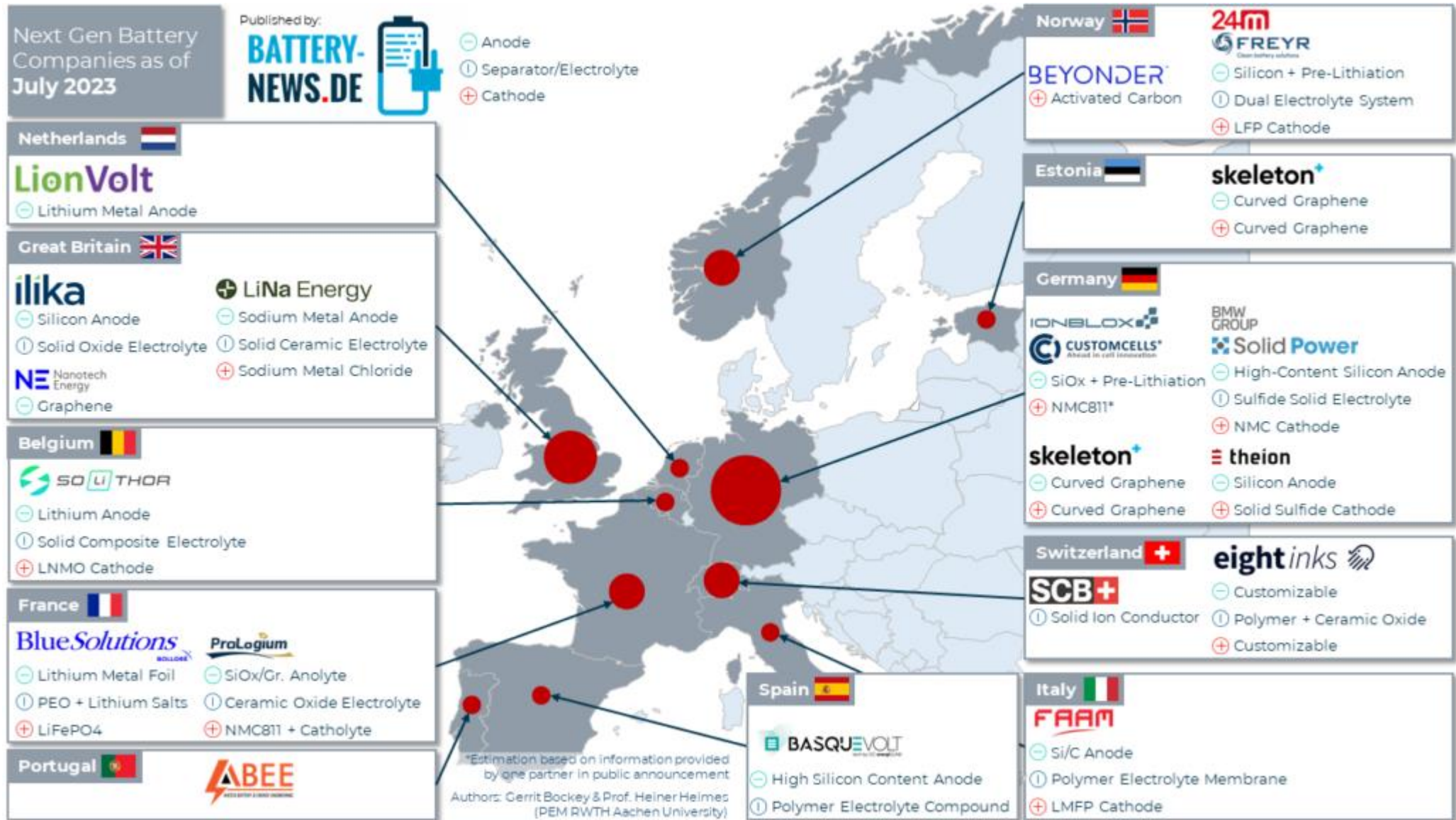


# But challenges are mounting...

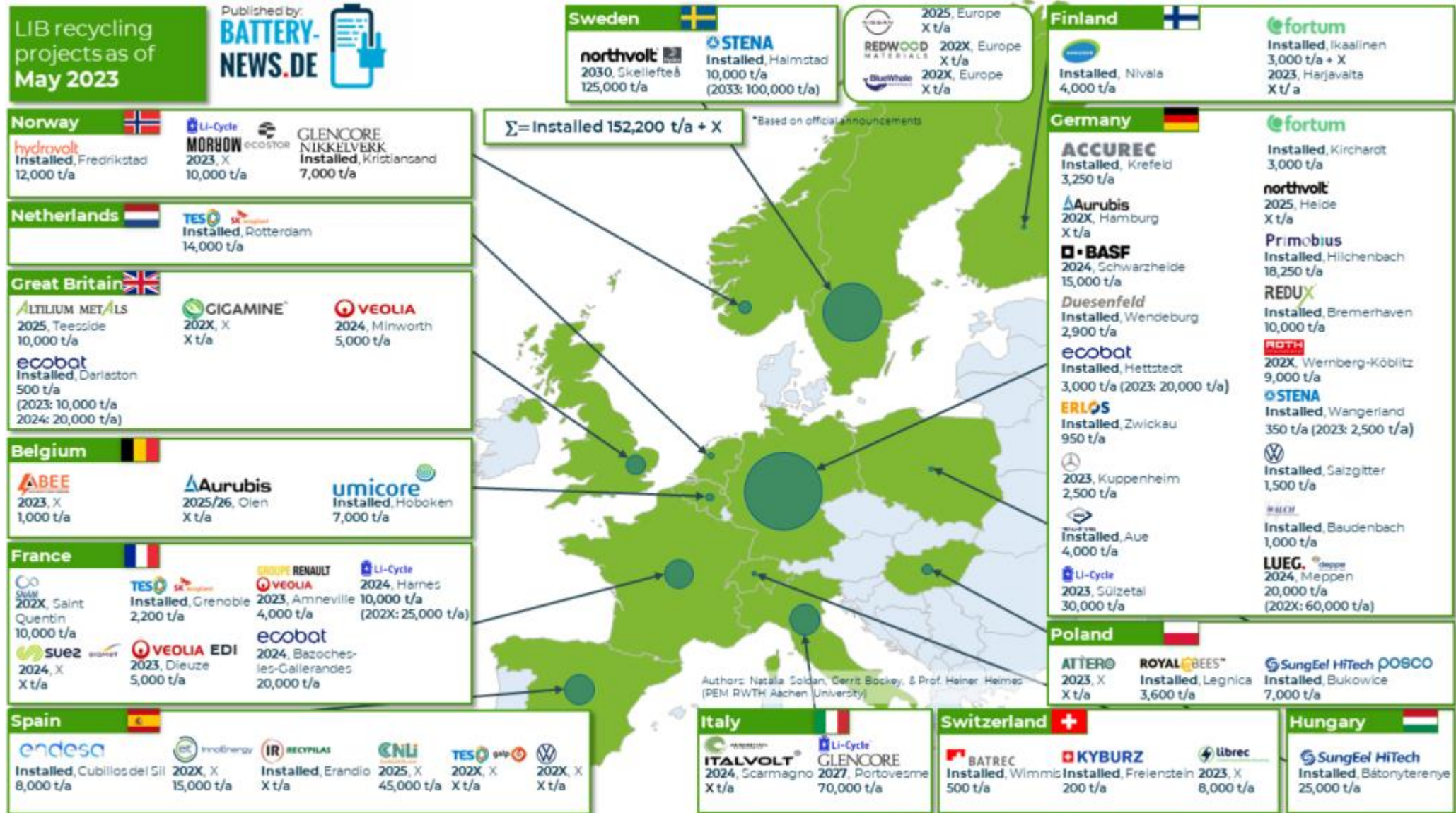
- Innovation
- Sustainability
- Circularity – recycling
- Skills



# Next generation battery R&D&I largely limited to old EU

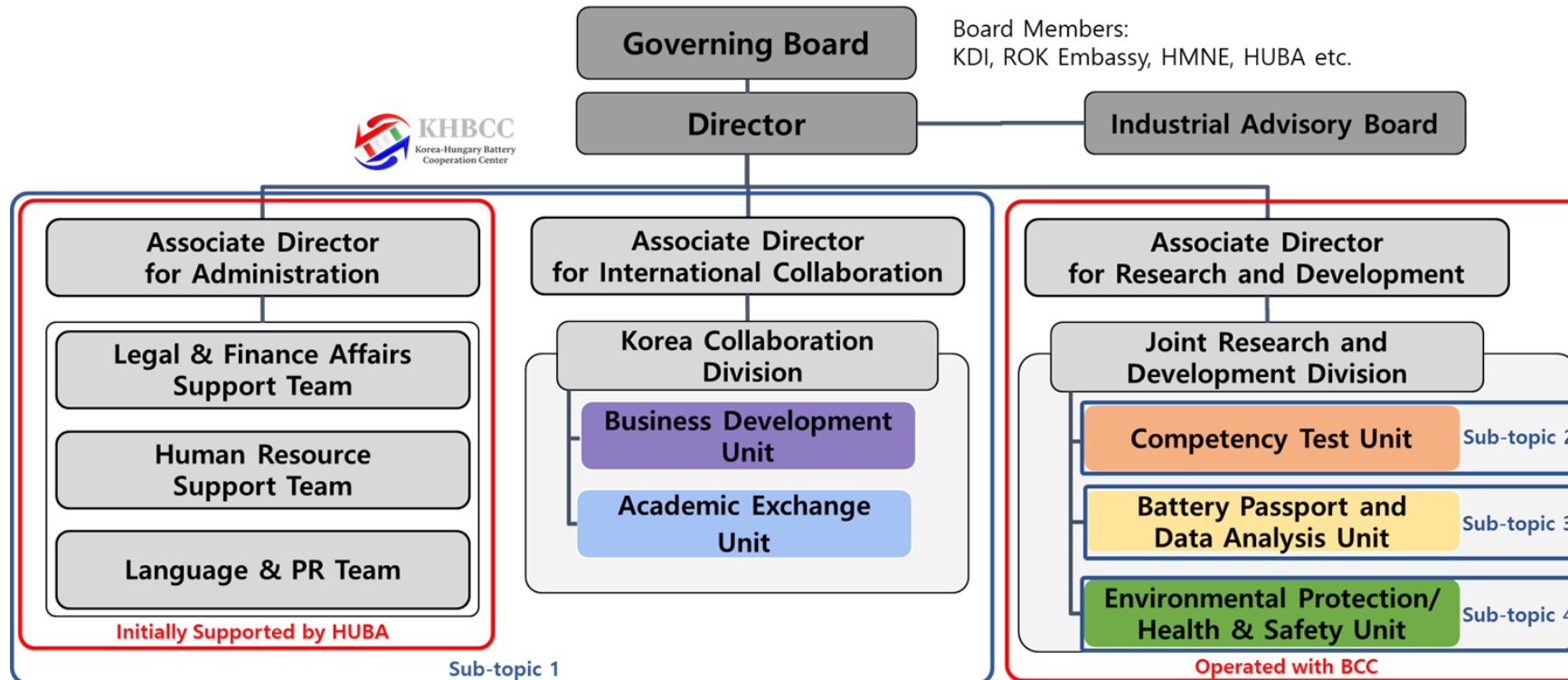


# Lack of skills and raw materials / recycling



# Korea-Hungary Battery Cooperation Centre to start pilot operation in 2025 to address challenges

- Hungary's recent Competitiveness Strategy 2024-2030 foresees the establishment of a Battery Competence Centre
- The Korea-Hungary Battery Cooperation Centre under EIPP can be an important contribution to BCC: EoLB, sustainability, battery traceability



# HUBA – the one-stop-shop to the Hungarian battery value chain!



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