

Hungarian Battery Week 2024

THE DEVELOPMENT OF THE EUROPEAN BATTERY VALUE CHAIN

2024 November 6

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EBA250 Mission

Build and create a resilient, competitive and sustainable EU **battery value chain** worth €250bn/a



EIT InnoEnergy

Mandated by the European Commission in 2017 to drive forward the activities of the EBA250



Collaboration with Stakeholders

Work closely with industry & decision makers at EU and Member State level



EBA250 Members

800+ dynamic industrial members, inclusive and comprehensive ecosystem



Maroš Šefčovič, EVP of the European Commission

*“The lack of a domestic, European cell manufacturing bases jeopardizes the position of EU customers because of the **security of the supply chain, increased costs due to transportation, time delays, weaker quality control or limitations on the design.** So, we need to **act fast – and collectively- to overcome this competitive disadvantage [...]**”*

EU Battery Ecosystem since 2017



EU Policy

EU Battery Value Chain

Research & Innovation

Workforce Development

EU Battery Regulation

30+ Announced Gigafactories & 100+ Projects across the value chain

R&I networks bridging the gap between Academia & Industry

Skills Institute Battery Academy by EIT InnoEnergy

NET-ZERO INDUSTRY ACT

*Non exhaustive

Critical Raw Materials Act

EU Learning Lab Battery Cells by Fraunhofer FFB

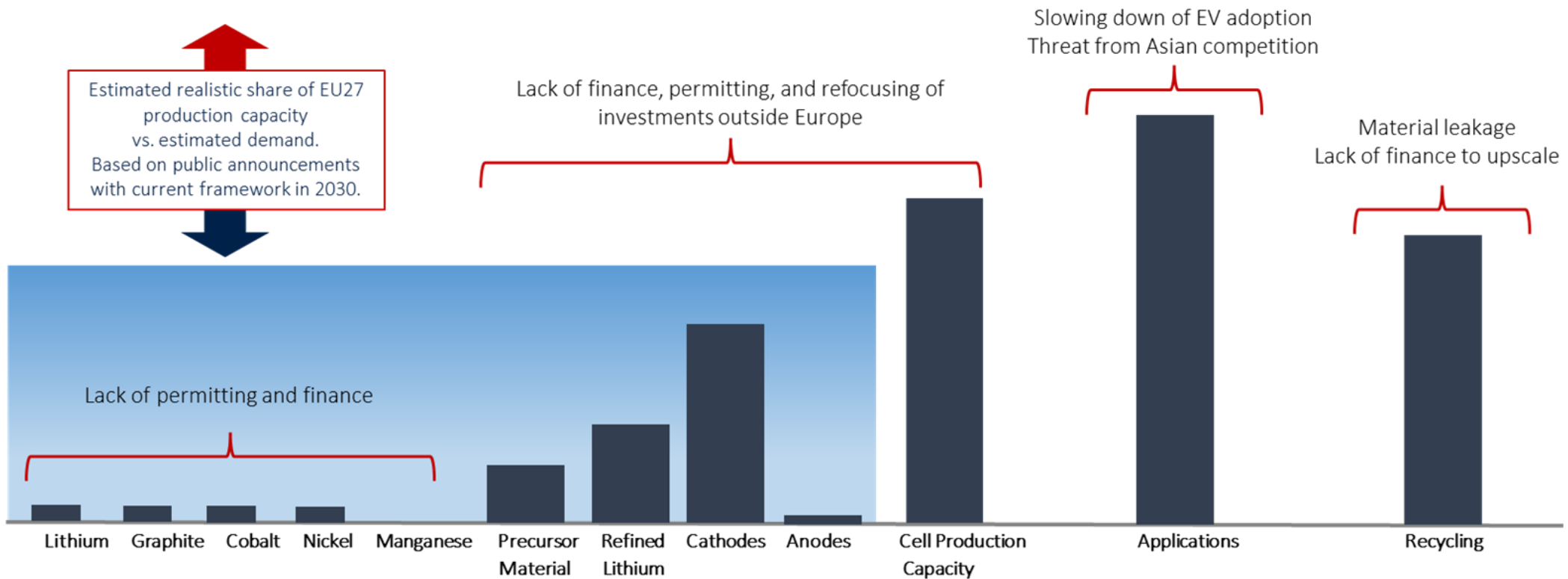
3Bn from Inno. Fund

... and much more!

European Industrial Battery Value Chain



Expected EU demand (ambition) in 2030: 1.000 GWh

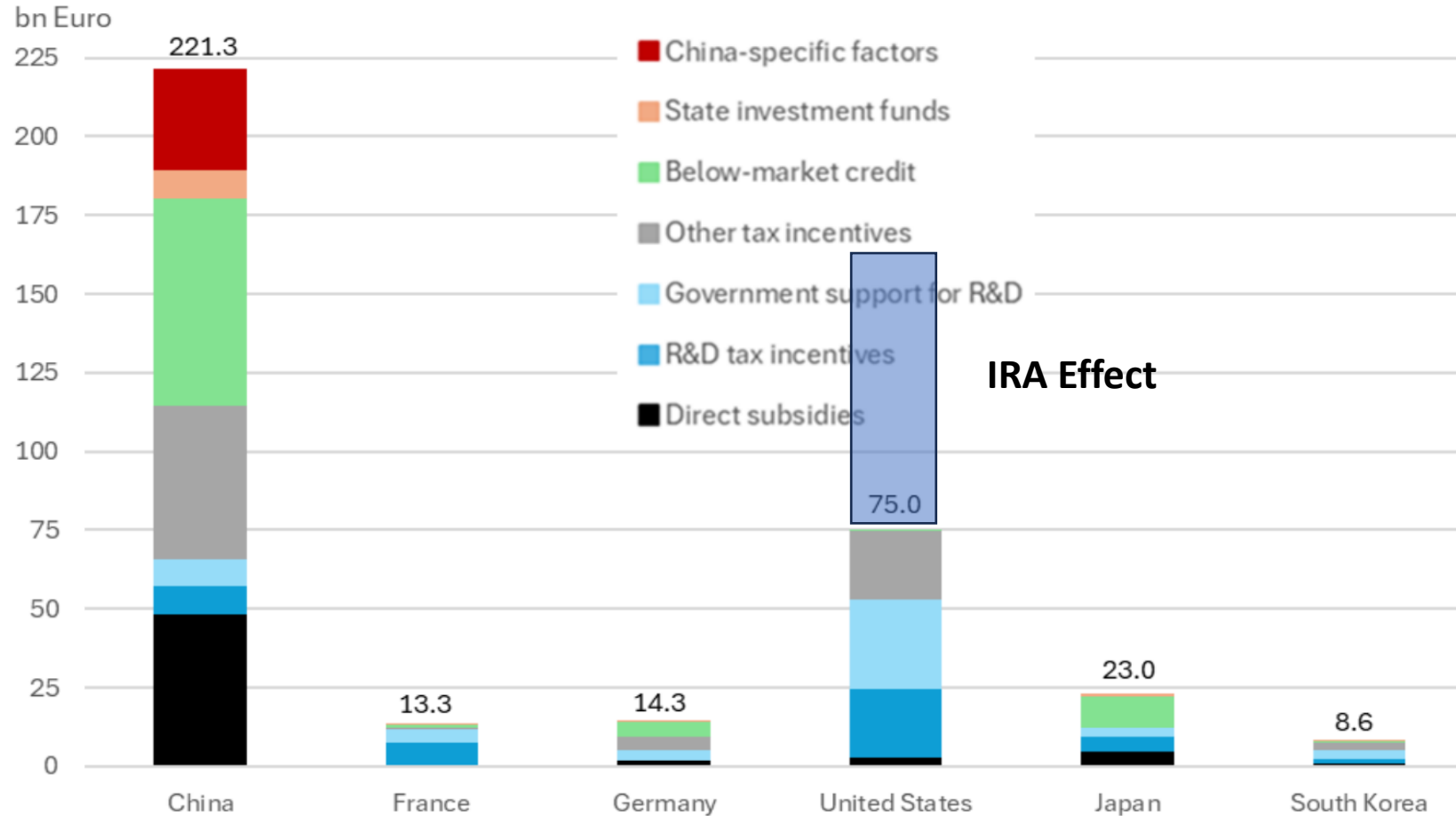


- Skilled workforce
- Machinery and equipment
- Cost competitive energy

Cross-sectorial gaps and challenges

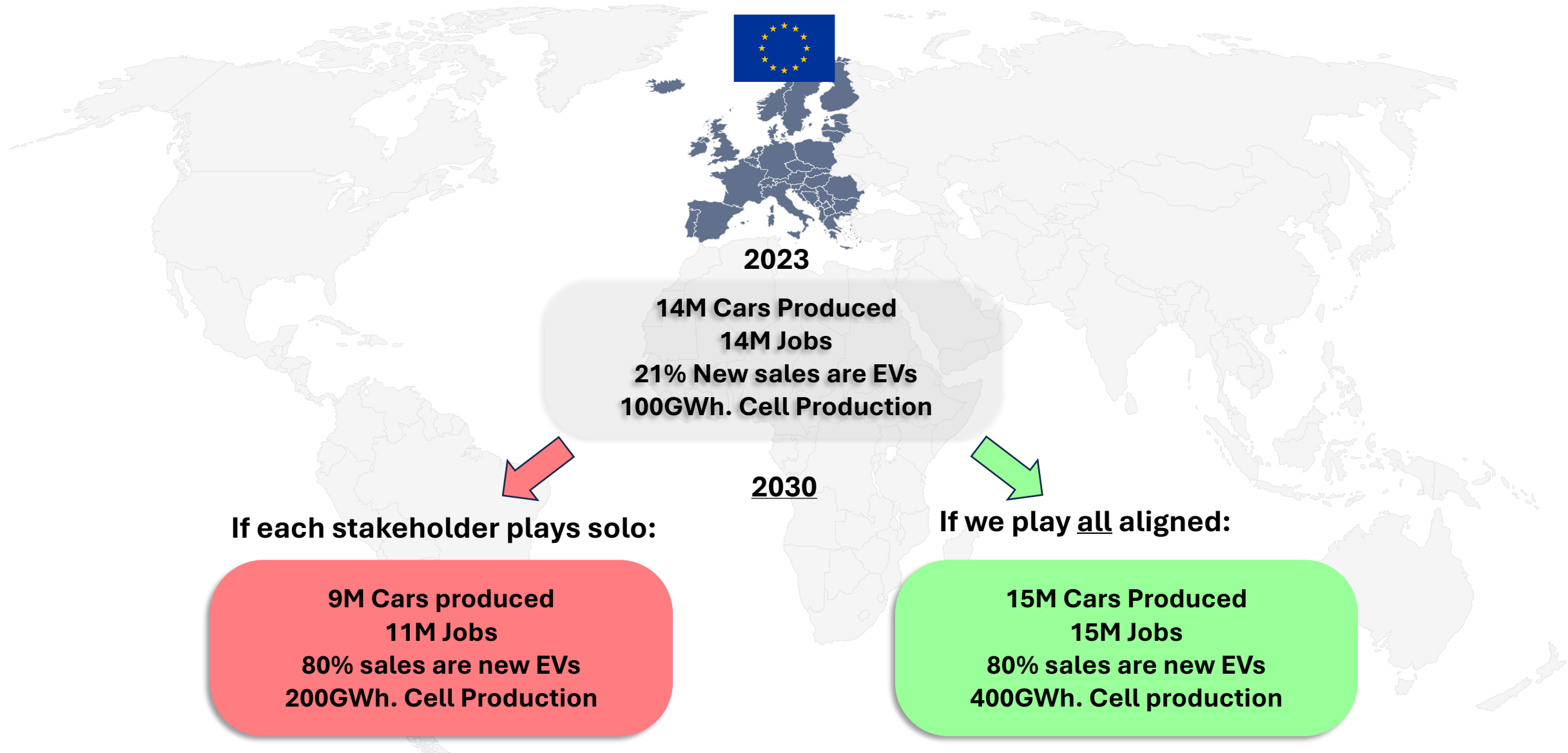
Massive Industrial Support in China and US

Figure 1b:
Industrial support spending in China and key OECD countries, 2019 (bn Euro)



Source: DiPippo et al. (2022) and Deutsche Bundesbank (2024); own calculation in Euro and own illustration.

Scenario for 2030



2023

**14M Cars Produced
14M Jobs
21% New sales are EVs
100GWh. Cell Production**

2030

If each stakeholder plays solo:

**9M Cars produced
11M Jobs
80% sales are new EVs
200GWh. Cell Production**

If we play all aligned:

**15M Cars Produced
15M Jobs
80% sales are new EVs
400GWh. Cell production**

Call for Joint Actions

- 1 Accelerate the implementation of new EU Battery Regulation**
- 2 Production Support for Cell Manufacturers in Ramp up Phase**
- 3 Protect EU Automotive & Battery Industry**
- 4 Incentivize EU-made electric vehicles**
- 5 Secure upstream (raw & active materials) for EU battery makers & OEMs**
- 6 Bring industrial EU players together**

**For a competitive,
sustainable, &
resilient
European Battery
Value Chain**



Thank you

Contact

www.eba250.com