

European Battery Ecosystem in 2025 ... More of the same or some light?

Global highlights & painpoints in 2024

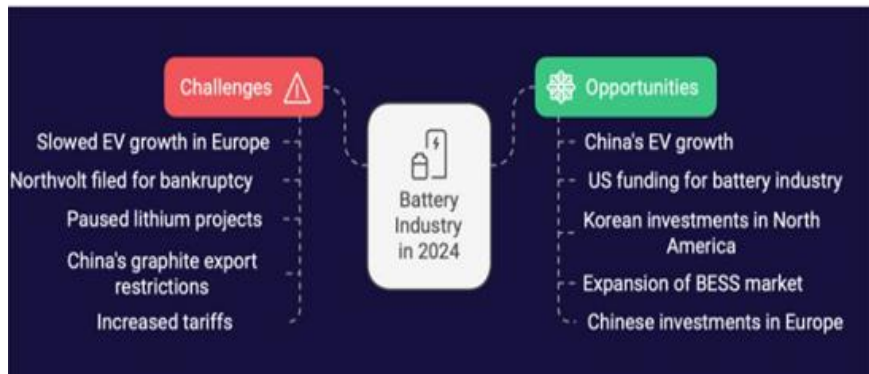


Christopher Chico • Following

I help battery professionals stay ahead with actionable trend analyse...

4w • 🌐

The battery industry didn't rest in 2024.



Trends for the European battery ecosystem in 2025?

Social

- Can people afford / do they want EVs now?

Legal

- Patchy recharging infrastructure
- Unclear & uncertain EU battery regulation
- Fines for OEMs or not, or less?

Economic

- EV demand incentives across EU?
- Funding of EU's industrial ambitions?

Political

- What about 2035 deadline for ICEs?
- Trade tariffs / EU vs US vs China?

Technology

- Innovation & competitiveness gap between EU and Asia - "Wake up" Europe !
- LFP vs NMC, design-to-cost vs design-to-performance, solid-state batteries

New EU Commission ... New political cycle ... New buzzwords ... And impact ?



EU's Competitiveness

Compass (late January 2025)



How do we close the EU competitiveness gap ?



We need a new Clean Industrial Deal for competitive industries and quality jobs in the first 100 days of the mandate.

Our full focus will be on supporting and creating the right conditions for companies to reach our common goals. This means simplifying, investing and ensuring access to cheap, sustainable and secure energy supplies and raw materials.

Ursula von der Leyen
President-elect of the European Commission (2024-2029)

EU's Clean Industrial Deal

(late February 2025) &

EU's industrial action plan for automotive sector



What does it mean in terms of industrial policy?



Competitiveness

We need a EU Budget that is

'more impactful, notably with a European Competitiveness Fund and better use of our budget to leverage further national, private and institutional financing'

EU's Competitiveness Fund

(2028-2034 – and before?)



What is the role of innovation & its industrialization, and how do we fund it?

Innovation & industrialization are key to address “4S” battery challenges ... But it needs the right enabling policy framework & “MONEY”

SCOPE of operations & technologies

- Design-to-cost battery chemistries
- Design-to-performance battery chemistries (incl. solid-state batteries)

SCALE of investments & their profitability

- Less CAPEX-intensive & more agile manufacturing processes
- Less energy-intensive & cleaner production processes

SPEED of industrialization & innovation

- AI-enabled digital twins for production lines
- Platforms for accelerated discovery of battery chemistries

SUSTAINABILITY of operations & products

- Cost-optimized recycling processes for batteries with low metal value
- Alternatives to PFAS & derivatives

Illustrative



No money = no discovery = no autonomy = no security for Europe