1. Deployment and market shares

*New battery electric vehicles registered in the EU*

Sales of new electric vehicles are increasing in the EU, but still need to grow 7 times by 2035, to match projected demand.

Market share of “made in China” EVs increasing exponentially: from 1% in 2021 to 20% in 2023.

2. Affordability

Only 6 models sold for less than €30,000 including 3 Chinese ones. As of 1/1/24, no model below €20,000 average price (without incentives).

3. Infrastructure

*Number of public charging points*

Overall number of charging points increasing according to alternative fuel infrastructure regulation target.

But 61% of charging points in three EU countries.

No data on grid preparedness for charging needs.
4. Jobs and skills

**Total direct and indirect employment**

- Direct manufacturing
- Indirect employment

**Total employment** has recently decreased in the automotive industry.

Automotive Skills alliance aims at reskilling/upskilling 700,000 workers by 2027.

5. Access to resources

**EU demand for EV batteries vs. EU battery gigafactories capacity (GWh)**

- Fully commissioned
- Under construction
- Announced
- BEVs demand

Announced batteries gigafactories can more than cover demand.

But quick acceleration of construction required.

**Demand for cathode and anode materials vs. production capacity (tonnes)**

- Commissioned capacity
- Announced capacity
- Demand

Cathode and, esp. anode, capacity insufficient to satisfy demand. Risk of serious dependencies at batteries component level.

**Raw materials supply risk**

- NMC (111)
- NMC (532)
- NMC (622)
- NMC (811)
- NMC (955)
- NMCA
- NCA
- LFP

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