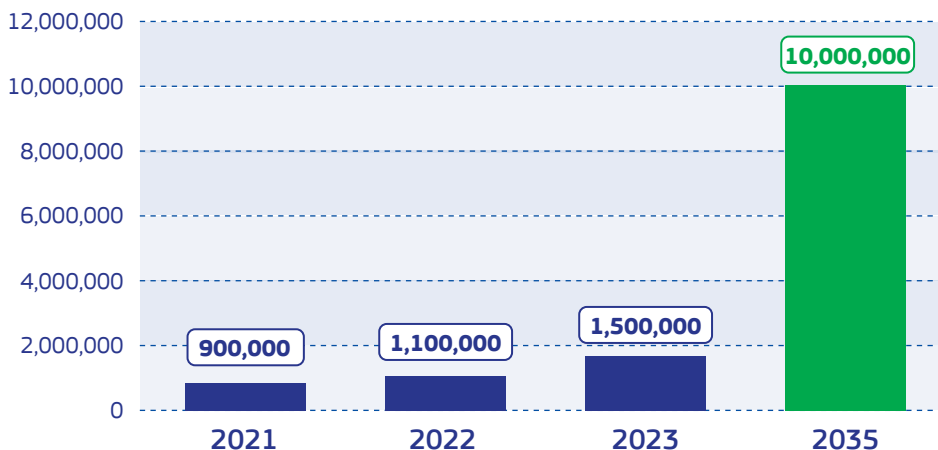


# DASHBOARD TOWARDS ZERO-EMISSION VEHICLES

#Route35

## 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

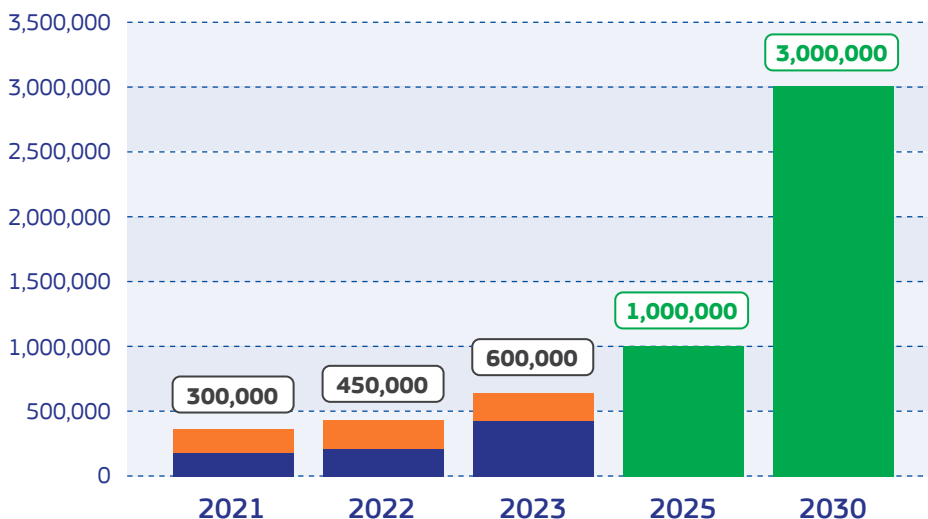


Only 6 models sold for less than €30,000 including 3 Chinese ones  
As of 1/1/24, no model below €20,000 average price (without incentives)

## 3. Infrastructure

*Number of public charging points*

■ DE FR NL ■ Other MS



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



But 61% of charging points in three EU countries

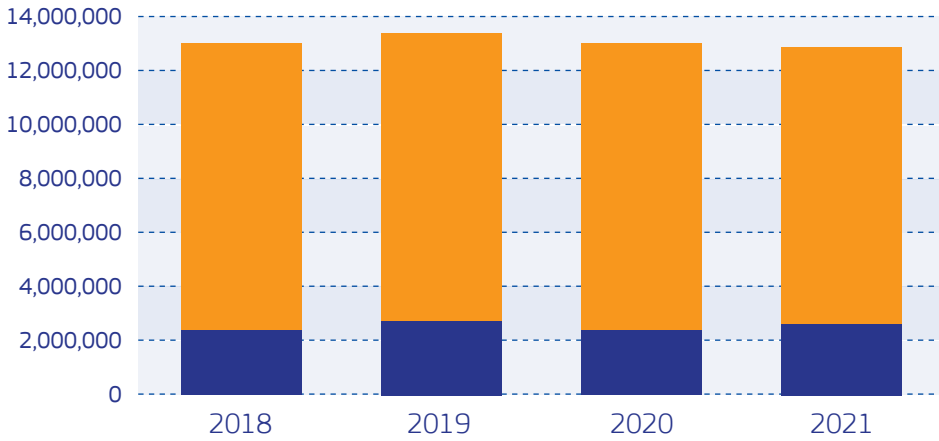


No data on grid preparedness for charging needs

## 4. Jobs and skills

Total direct and indirect employment

Direct manufacturing Indirect employment



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

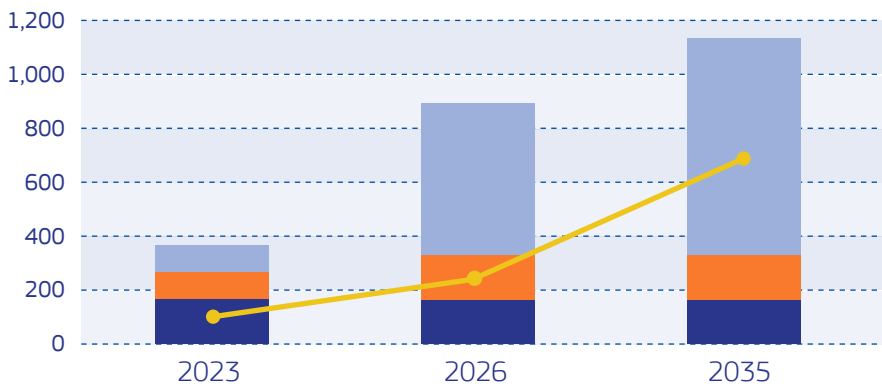


Automotive Skills alliance aims at **reskilling/upskilling 700,000 workers by 2027.**

## 5. Access to resources

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

Fully commissioned Under construction Announced BEVs demand



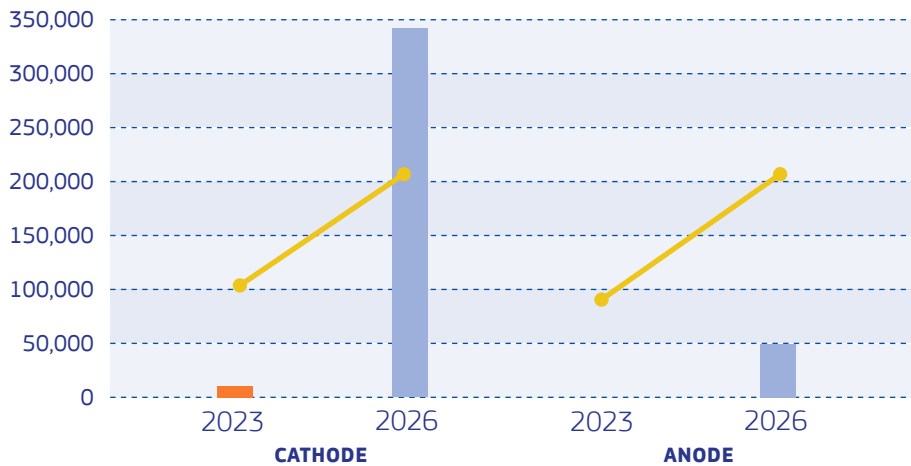
Announced batteries **gigafactories** can more than cover demand



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

