

E-Mobility Ramp-up

Opportunities & risks along the value chain

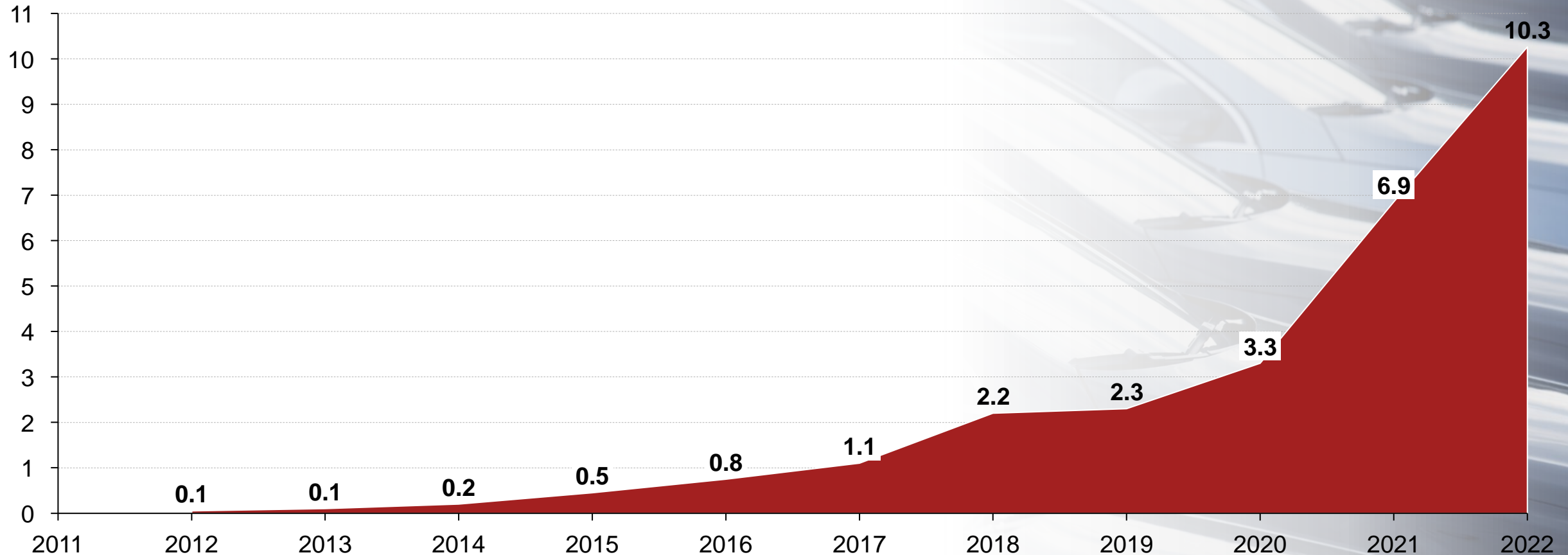
Dr. Philipp Rose
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In 2022, global EV sales reached a record-high of 10 million vehicles globally – over 50% increase from previous year

Annual EV sales including BEV and PHEV (*million vehicles*)

Global electric vehicle (EV) sales

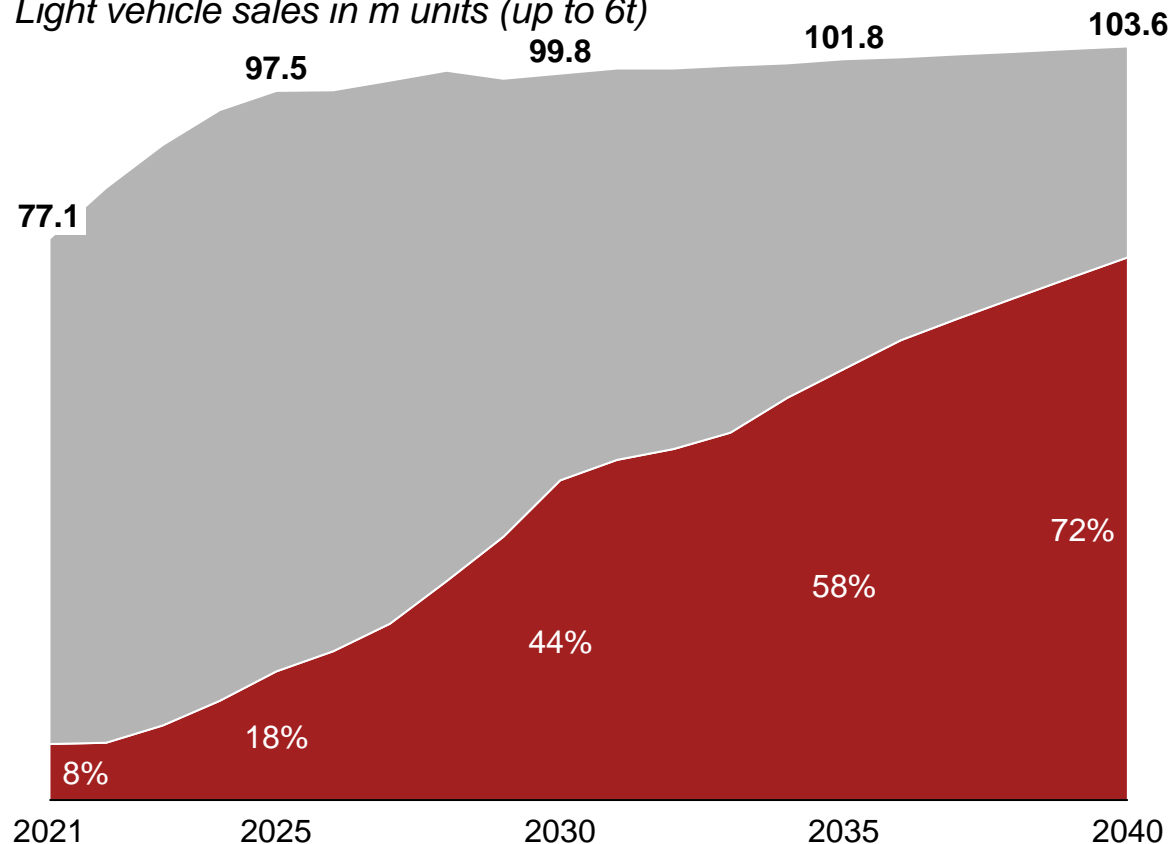


The EV growth will continue to ~45% market share in 2030 – fueling an immense battery demand of ~4 TWh globally

BEV diffusion and battery demand (*realistic scenario, as of 2022*)

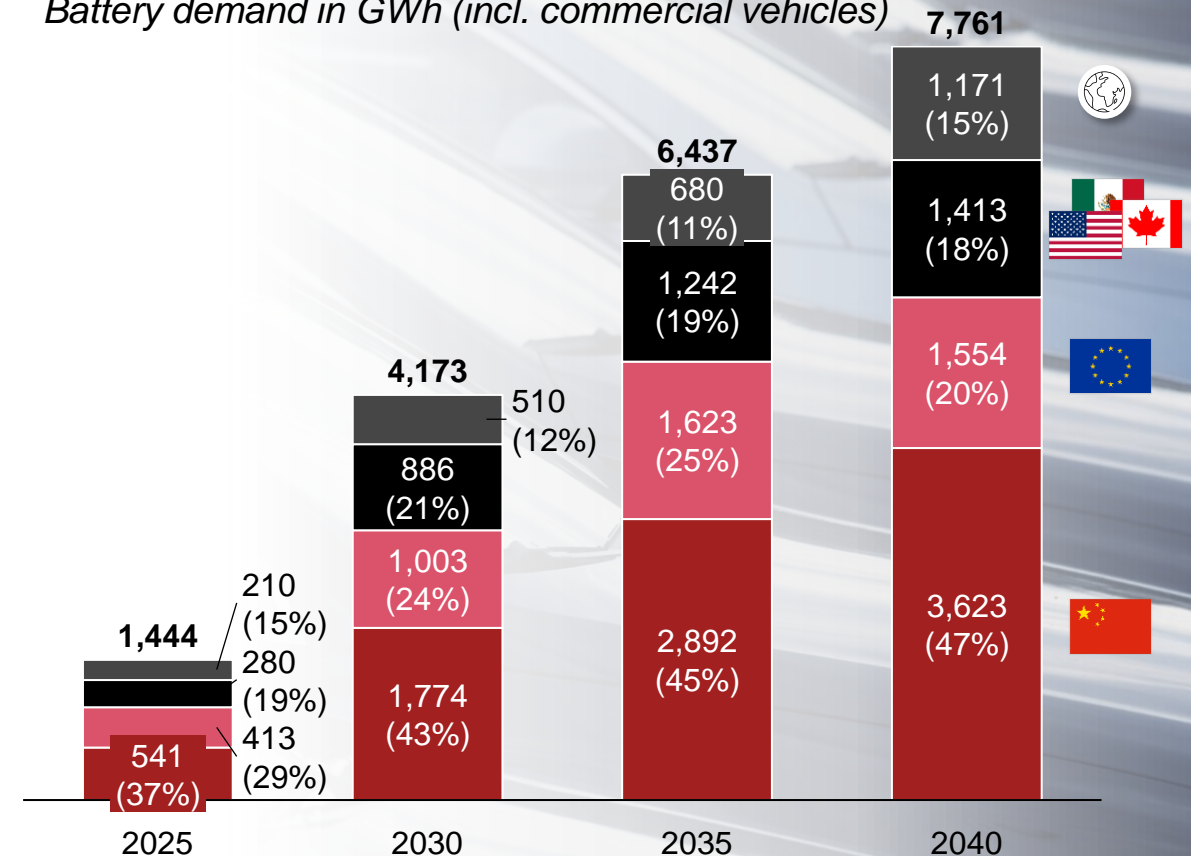
Global BEV diffusion

Light vehicle sales in m units (up to 6t)



Global battery demand

Battery demand in GWh (incl. commercial vehicles)



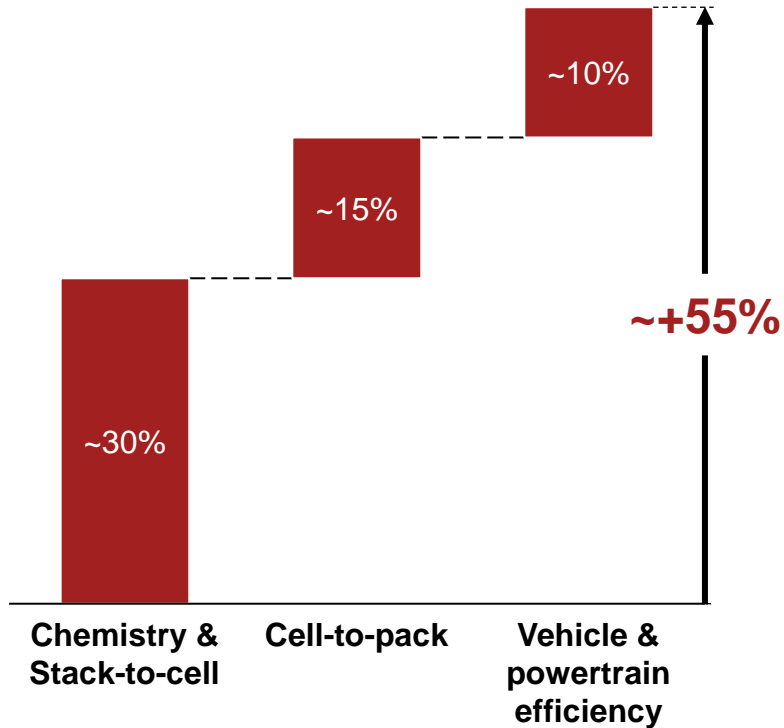
The battery will be nothing such as a commodity, but the key brand differentiator and a competitive driver

Technological development (2022 vs. 2030)

Vehicle range increase



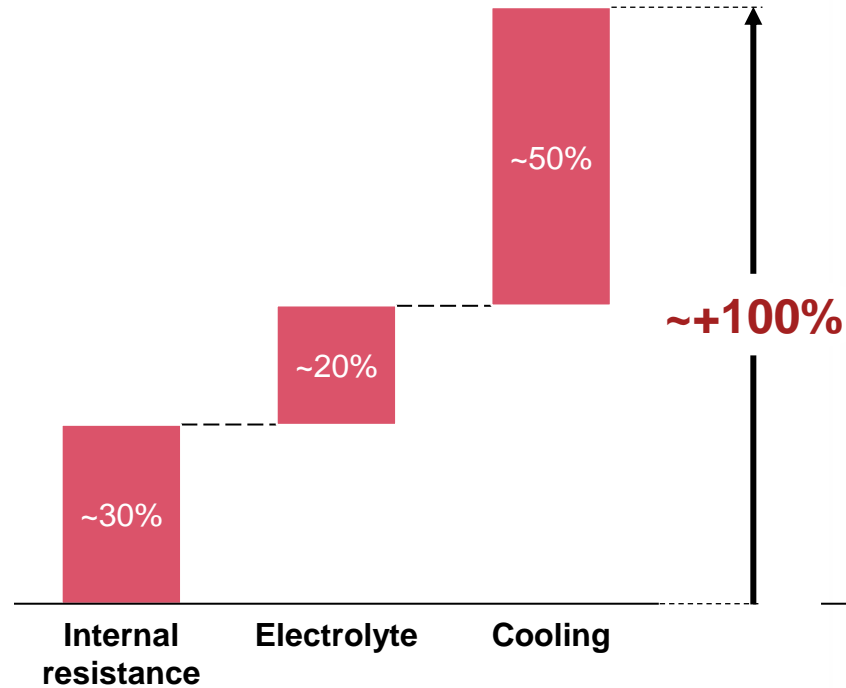
Exemplary for prismatic NMC



Charging speed increase



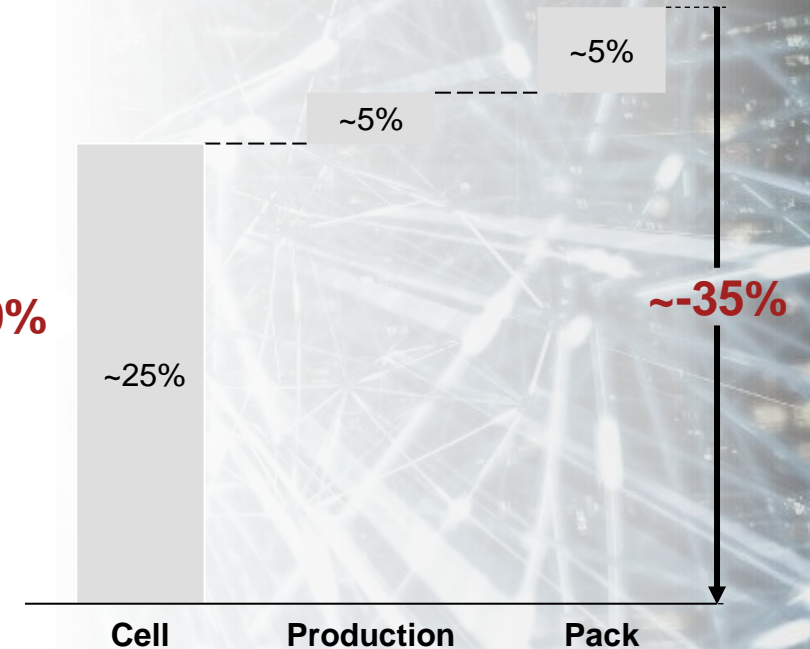
Exemplary for prismatic NMC



Battery cost reduction



Exemplary for prismatic LFP



Global annual revenues will equal multiple DAX companies & cumulated investments of 2x Austria's GDP will be required

Global cross industry value pool overview



Automotive



Materials & chemicals



SemiCon



Energy & infrastructure



Logistics

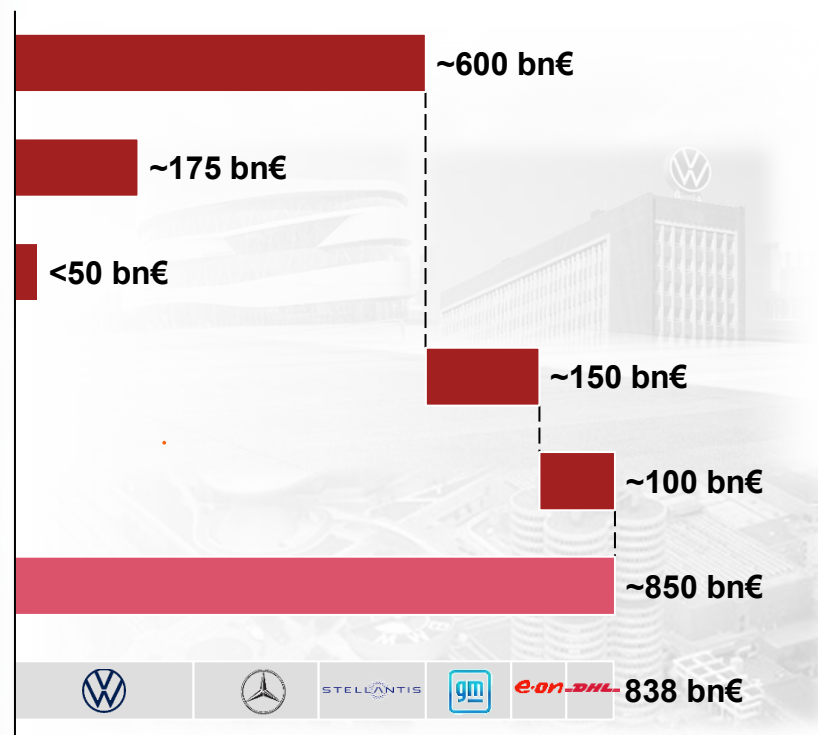


Total eMobility



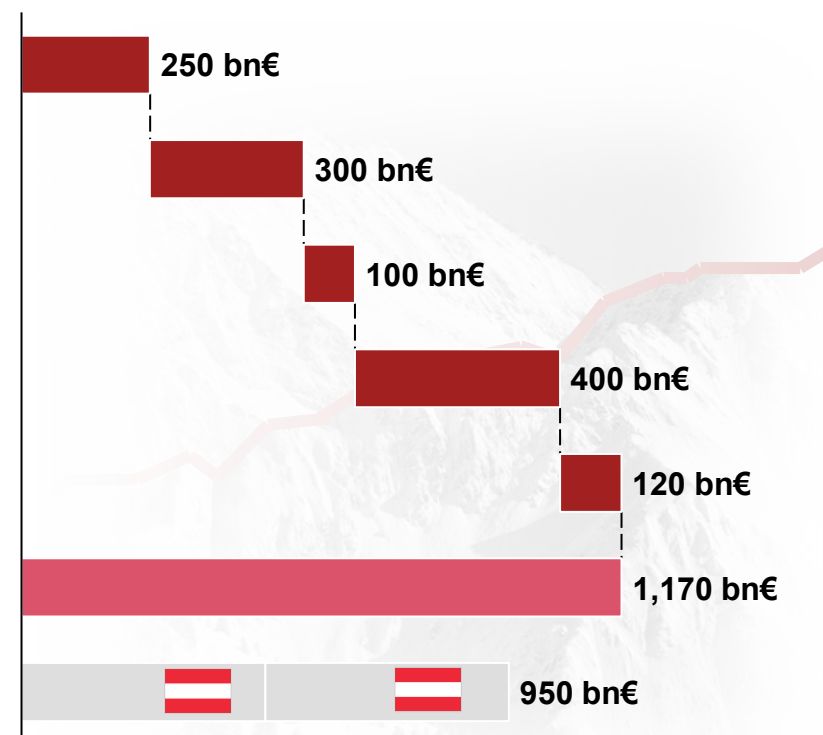
2021 Reference

eMobility global revenue (in 2030)



Annual eMobility revenue reach size of multiple industry leaders

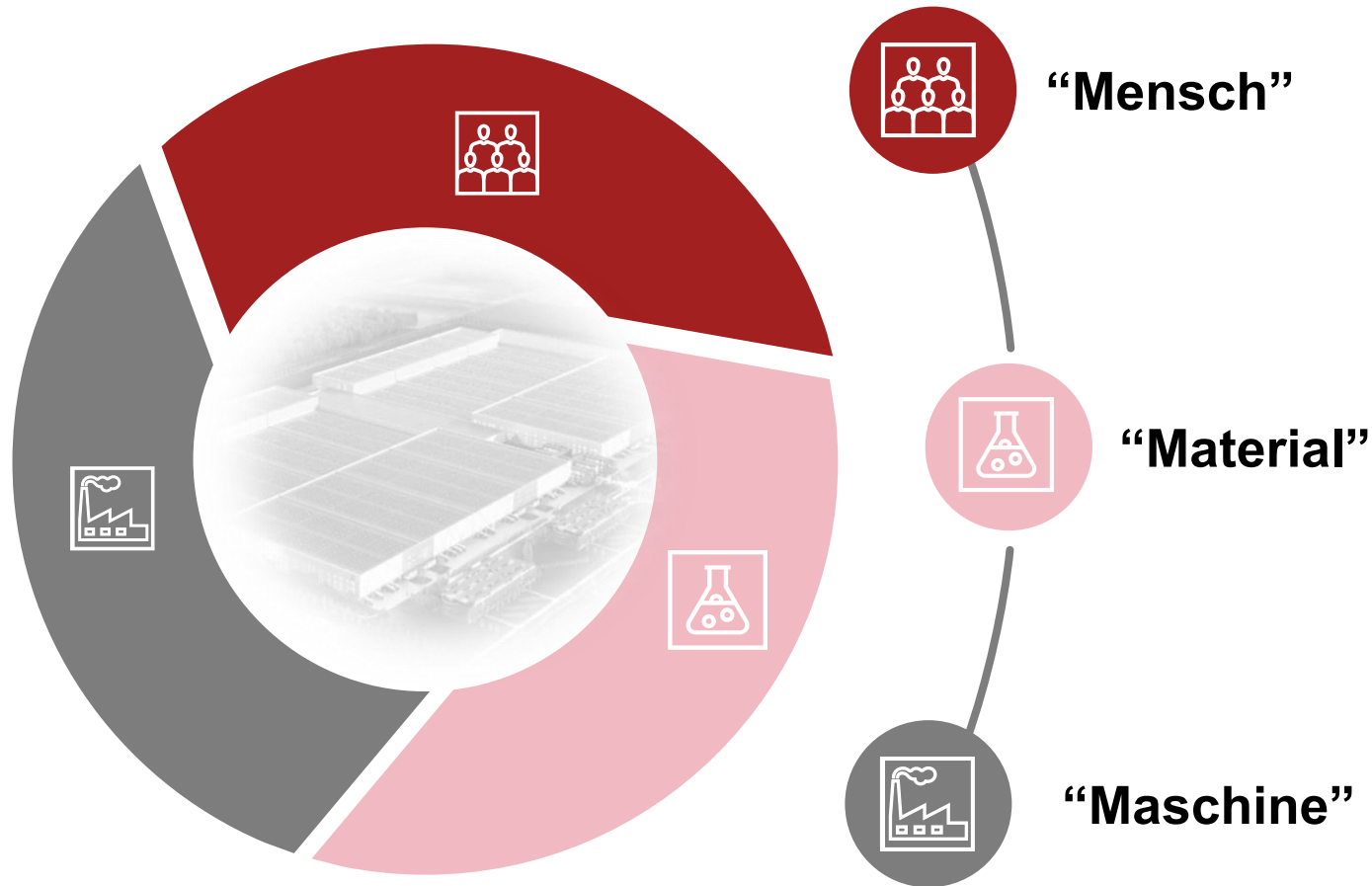
eMobility one-time CAPEX (until 2030)



Total investment 2 x Austria's GDP (~25% of German GDP)

The 3 M's “Mensch, Material & Maschine” are the pivotal elements for the eMobility transformation

Key elements of the eMobility transformation



Thank you
