FACT SHEET EU BATTERY INDUSTRY STATUS 2026

01 Cell Production

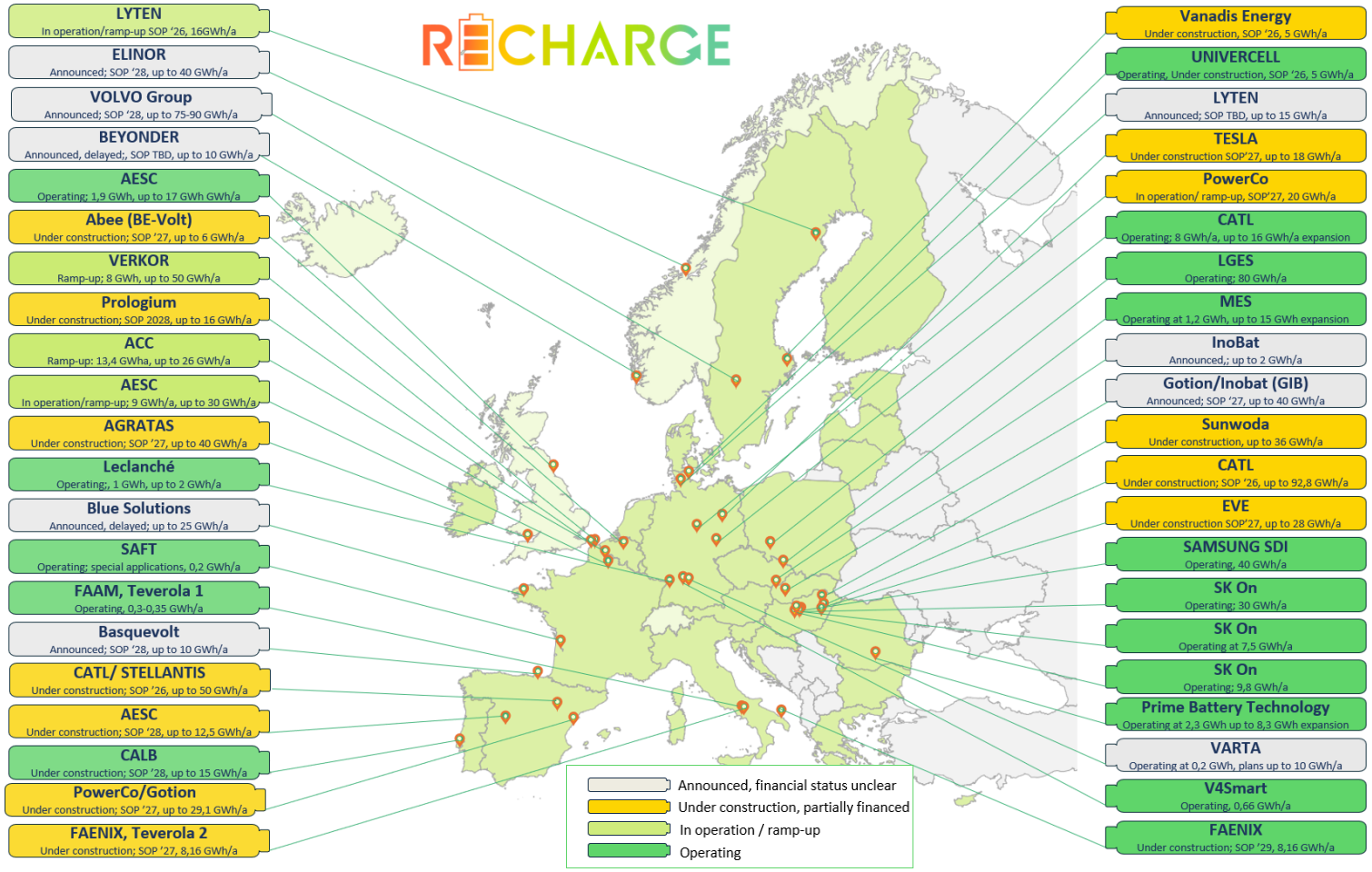
Current installed capacity:
265 GWh/a
regardless of current utilisation or output.

In the pipeline:
612 GWh/a
is in ramp-up, under construction or announced.

Total announced capacity:
876 GWh/a
of cell manufacturing capacity.

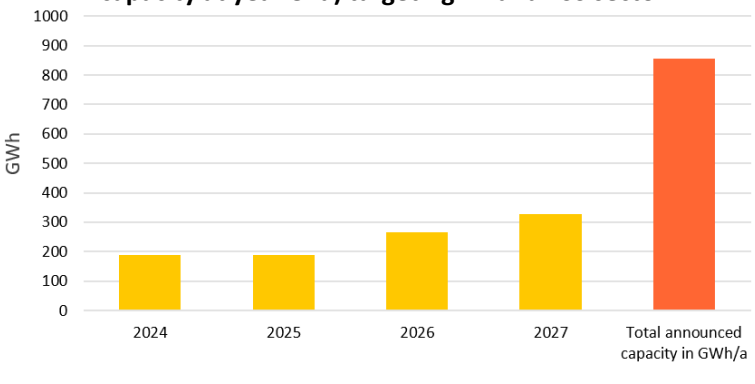
NZIA target:
90% of annual EU battery demand by 2030. Equivalent to **≥550 GWh/a** of EU manufacturing capacity.

Map of Europe's Announced Battery Cell Manufacturing Capacity for EV and ESS Applications



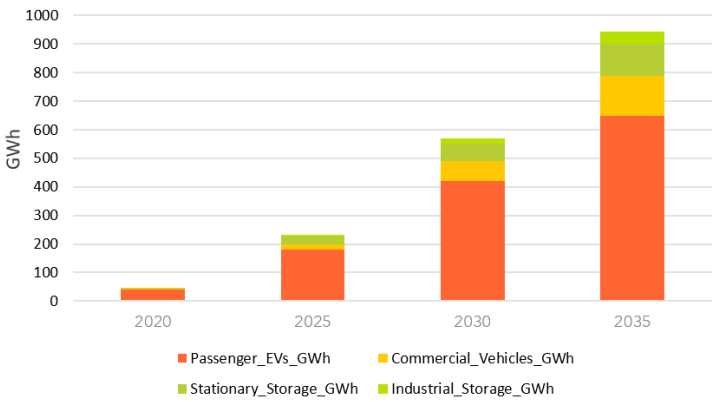
Source: RECHARGE Battery Ecosystem Monitoring, based on publicly available company announcements on installed and announced battery cell production capacity for EV and ESS applications. Installed capacity refers to the annual production potential that facilities are technically equipped to produce based on installed equipment, providing an indication of Europe's manufacturing potential independent of current output.

EU-27 battery cell capacity build-up (in GWh/a, installed capacity at year end) targeting EV and ESS sector



Source: Indicative estimation based on monitoring of public announcements

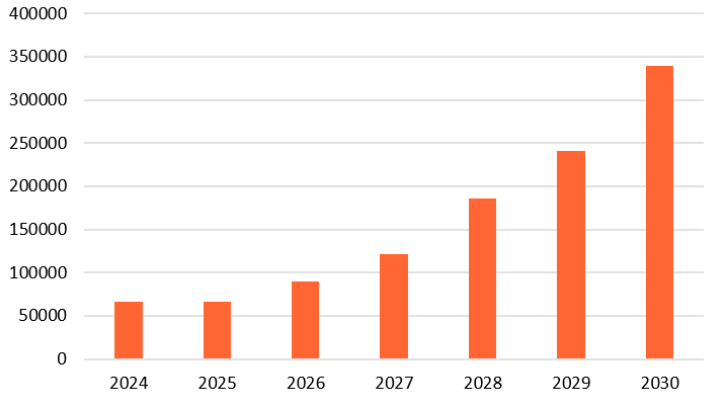
Annual cell demand continues to grow, with new applications starting to grow



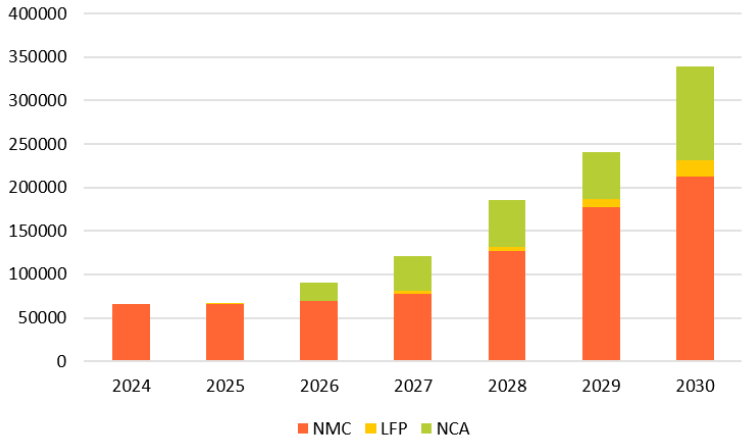
Source: Indicative EU demand tramodellingjectories based on IEA, SolarPower Europe, ACEA and EU policy; values are stylised estimates.

02 CAM Production

Total CAM capacity build-up



CAM production by chemistry in tonnes/a



CAM production at a glance...

- CAM capacity is set to grow from 90,000 tonnes per year in 2026 to 339.000 in 2030,
- NCM continues to dominate, NCA is growing, with LFP at an early stage.

03 Employment

Europe's battery industry could more than triple its industrial footprint

	Today	Additional pipeline	Full potential
Cell production capacity	277 GWh	648 GWh	925 GWh
Direct manufacturing jobs	26,300-31,000	61,600-72,600	87,900-103,600
Upstream materials & components jobs	13,600	31,800	45,300
Direct + upstream jobs	39,900-44,600	93,400-104,400	133,200-148,900
Total economy impact (3.9x multiplier)	155,600-173,900	364,100-407,200	519,500-580,800
Total economy impact (6.5x multiplier)	259,400-289,900	606,900-678,500	865,800-968,000

Today: 277 GWh operational capacity → **~40,000-45,000 direct and upstream jobs**, supporting **~152,000-283,000 jobs across Europe's wider battery ecosystem and economy**.

Pipeline: +648 GWh under ramp-up, construction or announced → **~93,000-104,000 additional direct and upstream jobs**, supporting **~367,000-685,000 additional jobs across the wider economy** if these projects are realised.

Full potential: 925 GWh → ~133,000-149,000 direct and upstream jobs, supporting **~520,000-968,000 jobs across the wider European economy**, depending on the degree of localisation of materials, equipment manufacturing, recycling and other upstream activities.

Europe's Battery Opportunity

- **Significant existing capacity:** Installed capacity represents the maximum production potential of facilities based on their existing equipment, regardless of actual output.
- **Untapped production potential:** The gap between installed capacity and actual output reflects slow industrial ramp-up, insufficient demand for EU-made batteries and operational constraints.
- **A major opportunity to unlock:** Europe already has operational manufacturing capacity equivalent to **50% of the NZIA target (277 out of 550 GWh).** The priority now is to accelerate ramp-up, ensure successful project execution and stimulate demand for EU-made batteries.