



Storage Value Chain Europe Engineering & Business Case

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Major Drivers/Trends

- Paris Agreement
- Green Deal (EU Carbon neutral 2050)
- European Industrialization Strategy
- Electrification
- Digitalization
- Electrical Vehicles
- Circular Economy

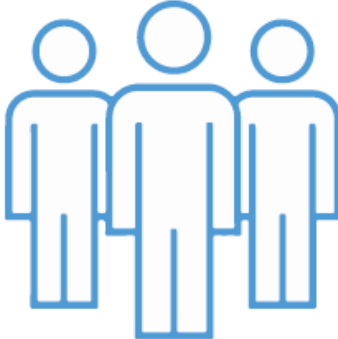
A circular battery value chain as a major driver to meet the Paris Agreement target

A circular battery value chain that is a major driver to achieve the Paris Agreement target to stay below the 2°C scenario



Enable **30%**
of the required emission reductions in
transport and power sector

Transformation of the economy in the value chain, creating new jobs and additional value



Create **10m** jobs, and
150b of economic value in a
responsible and just value chain

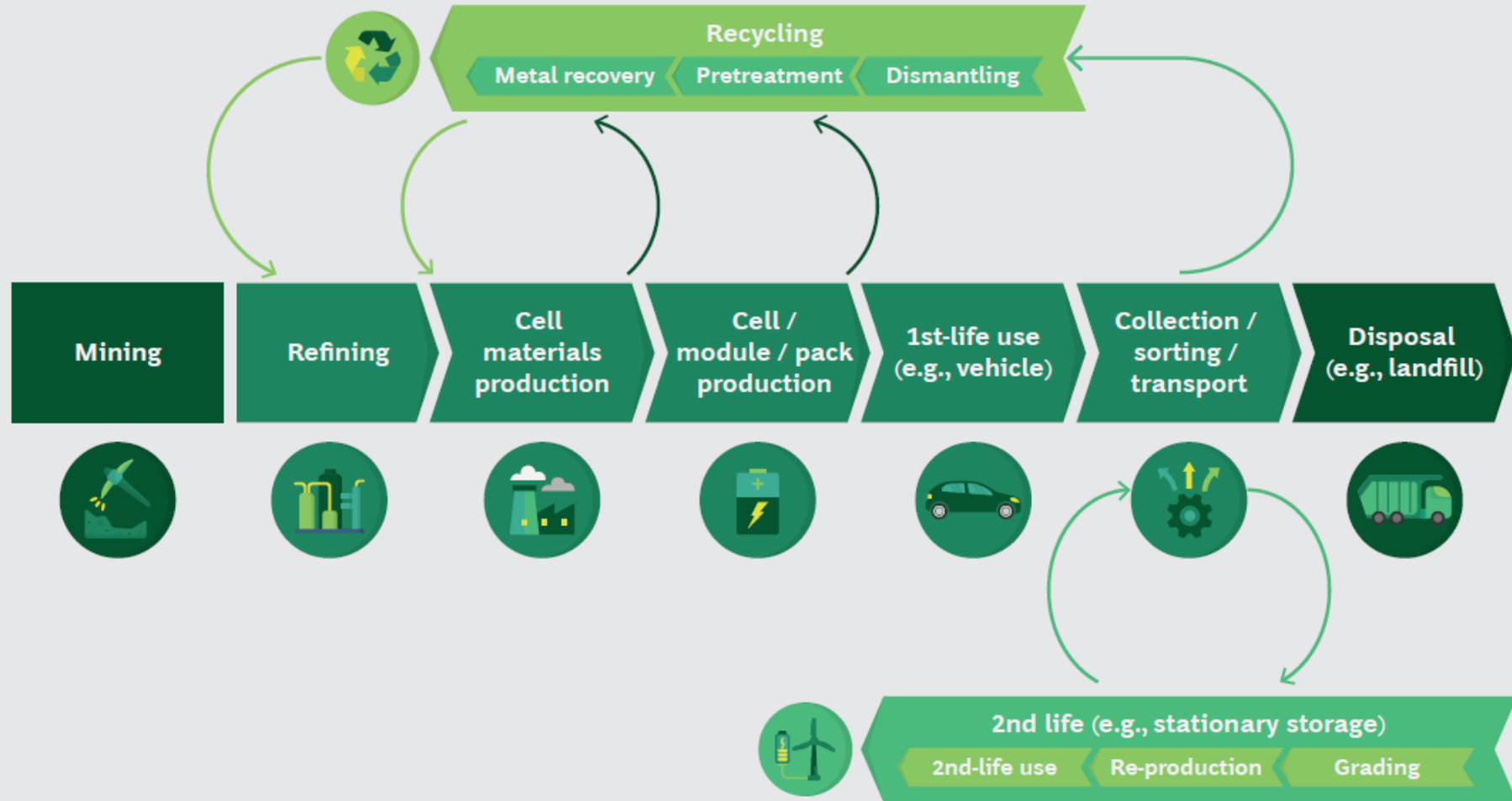
An industry safeguarding human rights, supporting a just energy transition and fostering economic development, in line with the UN SDGs



Provide **600m**
people with access to electricity, reducing the
gap of people without electricity by 70%

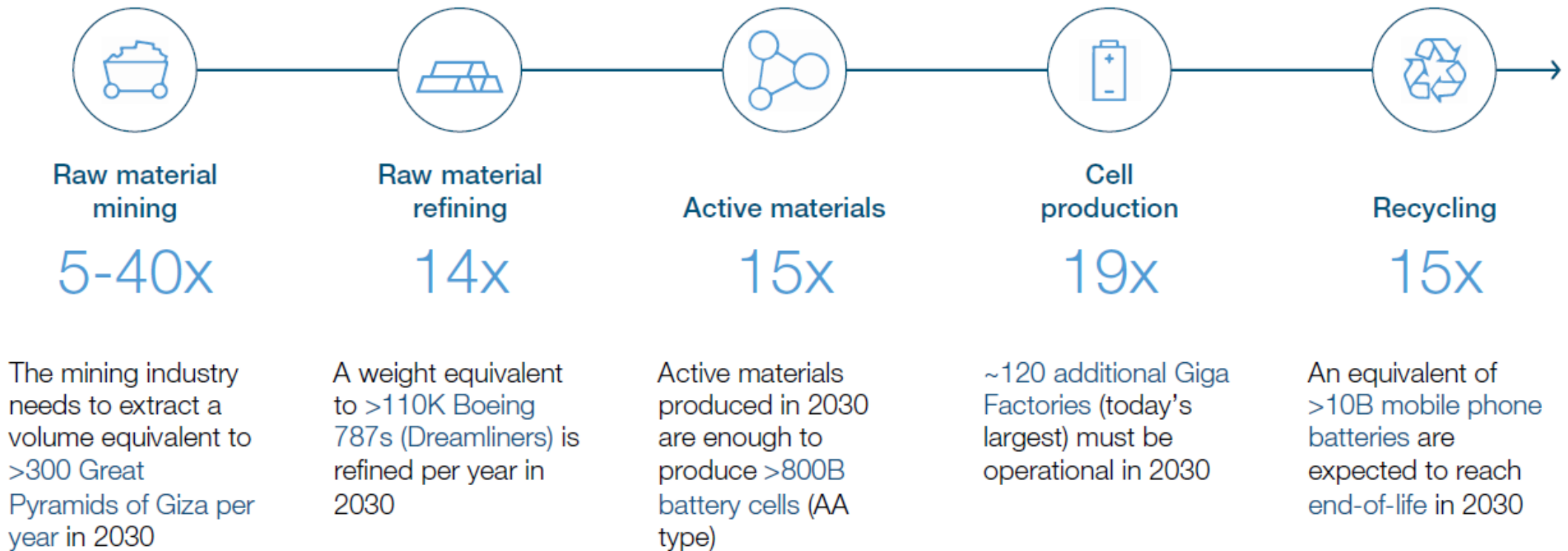
Source: World Economic Forum, Global Battery Alliance

EXHIBIT 1 | Three Options for EV Batteries at the End of Their First Life



Source: BCG analysis.

Scaling battery production by a factor of 19 is a major opportunity for every step of the value chain



Source: World Economic Forum, Global Battery Alliance

THANK YOU FOR YOUR ATTENTION!

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