

Battery Day



Battery
Competence
Cluster - NL



23 / SEP / 2026 | CONGRESCENTRUM 1931 | 'S-HERTOGENBOSCH

Internationalisation & Business Intelligence Break-out session

- 23 september | 15:00–15:55 uur



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15:40 – 15:55 | Open discussion Q&A

15:55 – 16:00 | Closing BCC-NL



From National Strength to Cross-Border Impact

Bram Hendrix

Program lead Internationalisation

> The Market is booming. Production power concentrated.

Europe has demand, knowledge and applications — but still lacks comparable scale and supply-chain control.



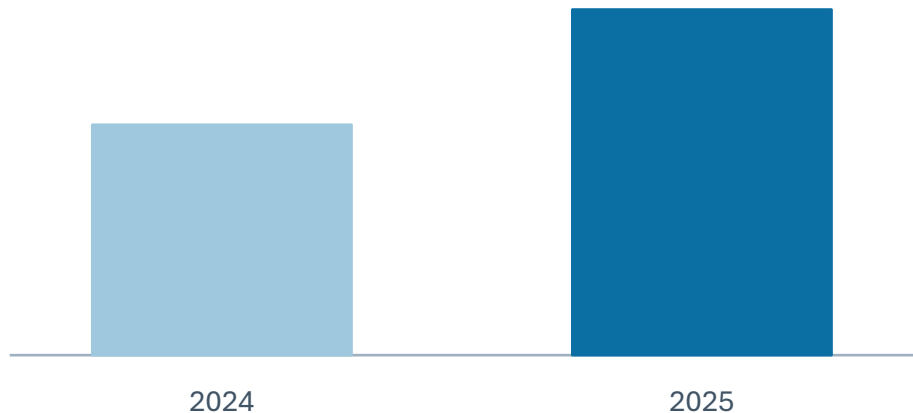
GLOBAL BATTERY DEMAND

>1.5 TWh

in 2025

+35%

year-on-year



Battery demand is accelerating across mobility and energy storage.

GLOBAL BATTERY OUTPUT

>80%
China

China produced well over 80% of all batteries in 2025.

Europe and North America account for most of the remaining output, while cell makers headquartered in China, Korea and Japan dominate globally.

THE EUROPEAN CHALLENGE

Turn strong demand and R&D into competitive industrial scale.



Batteries are becoming foundational infrastructure



The growth story is no longer only about passenger cars — storage, trucks and new chemistries are reshaping the market.

ELECTRIC MOBILITY

1.2 TWh

EV battery deployment in 2025

~30% growth vs. 2024

Heavy-duty is accelerating

Battery demand from electric trucks more than doubled in 2025.

ENERGY STORAGE

108 GW

new battery storage in 2025

+40% year-on-year

Fastest-growing power technology

Storage is moving from a niche to a core part of power-system flexibility.

CHEMISTRY SHIFT

>55%

LFP share of EV batteries deployed globally

~90%

LFP share in battery storage deployments

One battery market → many application-specific markets

Cost, safety, cycle life, energy density and raw-material exposure drive different technology choices.



Europe is shifting from ambition to industrial resilience



The strategic question is no longer only “how cheap?” — but also “how resilient, traceable and scalable?”

PRESSURES

1

Scale & cost

Global capacity is growing faster than demand, intensifying price pressure and competition.

2

Supply dependence

European and US factories still rely heavily on imported battery components, mostly from China.

3

Industrialisation gap

Strong R&D does not automatically translate into high-yield, high-volume manufacturing.

EU RESPONSE



€1.5bn Battery Booster

EU support for European cell producers during ramp-up, aimed at accelerating industrial deployment.



Battery Passport

Mandatory from 18 February 2027 for EV, LMT and industrial batteries >2 kWh placed on the EU market.



Diversification & circularity

Policy increasingly focuses on critical raw materials, recycling, traceability and supply-chain resilience.

For companies, internationalisation now combines market access with economic security, compliance and strategic partnerships.

> Where can the Netherlands create international value?



Not by owning the entire value chain — but by building strong positions in selected, high-value parts of it.

MAKE BATTERIES BETTER

Materials • production equipment • process technology

Leverage Dutch strengths in high-tech equipment, thin-film know-how and next-generation materials.

MAKE APPLICATIONS WORK

Heavy-duty • maritime • grid-support systems

Focus on demanding use cases where system integration, safety and reliability matter more than cell volume alone.

MAKE THE VALUE CHAIN SMARTER

Circularity • data • safety • testing • traceability

Turn EU requirements and lifecycle complexity into services, digital tools, testing and circular business models.

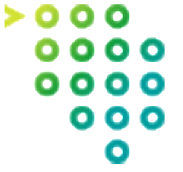
OPPORTUNITY

Dutch technologies can plug into international OEMs, cell makers and energy markets.

CHALLENGE

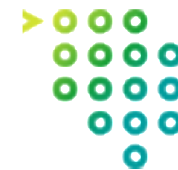
Scale-up, qualification cycles, capital and access to customers often sit outside the Netherlands.

Internationalisation is not an add-on — it is how Dutch battery technology reaches scale, customers and partners.



Together we accelerate
the growth of the
battery value chain

➤ Right to play in The Netherlands and global

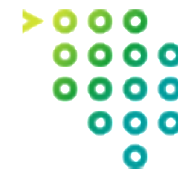


Achieving our goals is only possible with (international) collaboration:

“We connect, we direct, we enable, we bring it abroad”

- Different sub-targets:
 - Creating business opportunities for companies (and organizations)
 - Connect to push R&D projects for companies / research
 - Visibility of the NL battery ecosystem
 - Inbound: attract foreign companies to strengthen our ecosystem

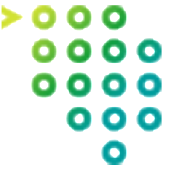
➤ Target and subtargets



“Together we accelerate the growth of the battery value chain”

- When are we happy?
 - Growing companies: more jobs & turnover
 - Higher export volume (higher turnover of the NL-battery sector)
 - Participation in EU-programs
 - Stronger NL ecosystem: more investments & companies
 - Recognized position in the European & international value chain: strategic autonomy

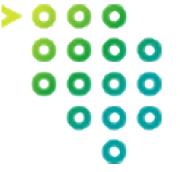
➤ Connect with Business Intelligence



- Detailed intelligence of NL-ecosystem
- Intelligence of target-markets
- Detailed understanding of NL position in international value chain



➤ Collaboration = crucial



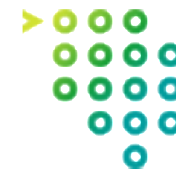
National collaboration:

- Working group started (ministries, RVO, NFIA, Regions & BCC-NL)

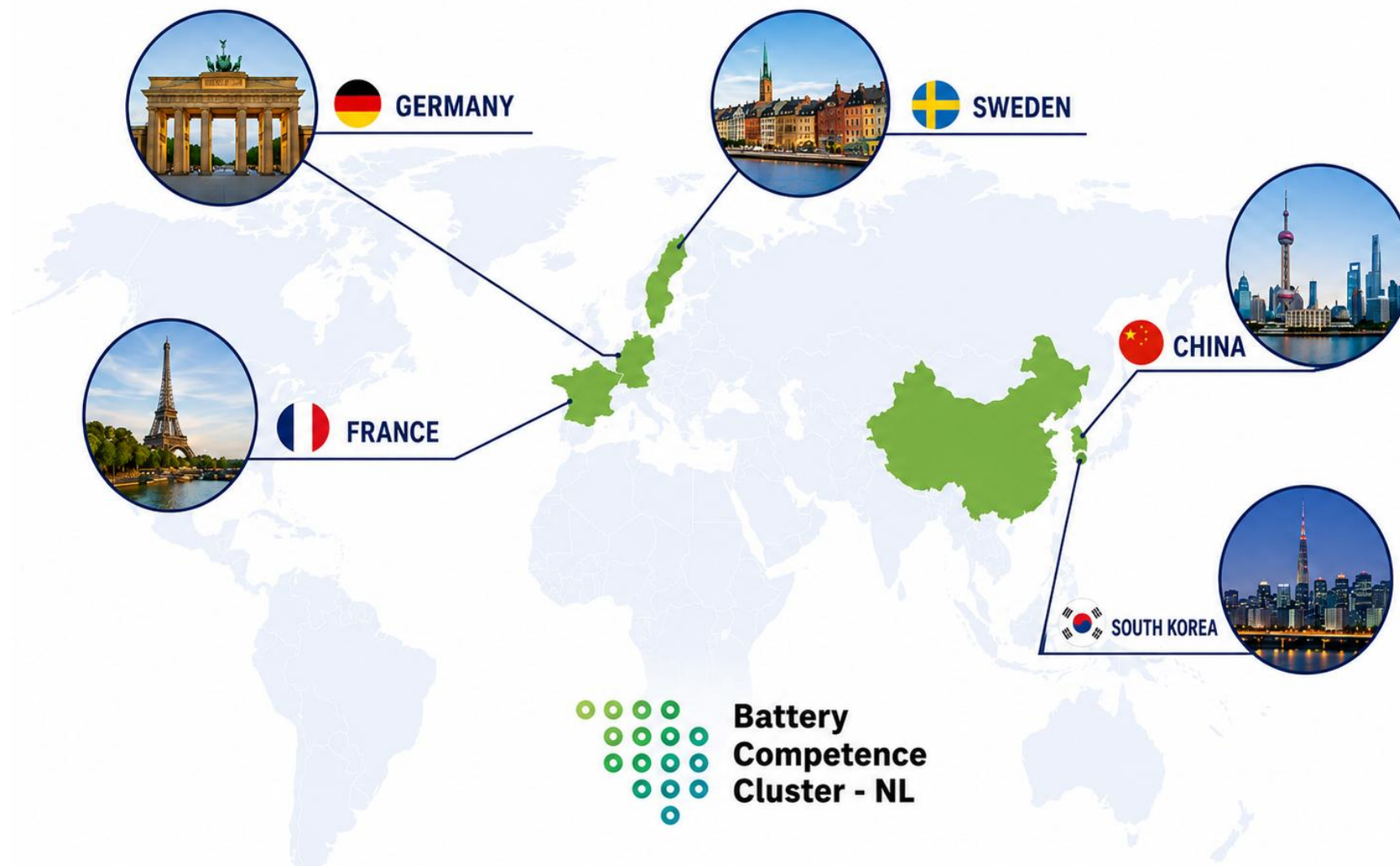
International collaboration:

- Embassy networks in focus countries
- Networks and clusters in focus countries

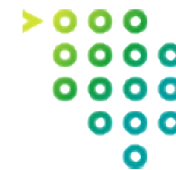
➤ Focus – 5 countries



The focus countries of BCC-NL



➤ EU-plan



Battery
Competence
Cluster - NL

BCC-NL EU PLAN

Strengthening the **European** battery ecosystem



SUBSIDIES



NETWORK



POLICY

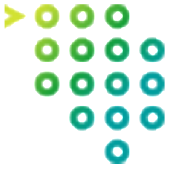


BUSINESS INTELLIGENCE



DISSEMINATION





**Your
input is
crucial**



Netherlands Enterprise Agency



*Netherlands Enterprise Agency supports
you*

Economic Promotion



Roy Paulissen
23 September 2026, Den Bosch



About the Netherlands Enterprise Agency (RVO)

A government agency, working on behalf of:

Ministry of Economic Affairs
and Climate Policy



€ 597,906,000

Ministry of Agriculture,
Fisheries, Food Security and
Nature



€ 324,571,000

European Union



€ 2,508,000

Ministry of Foreign Affairs



€ 134,693,000

Ministry of the Interior and
Kingdom Relations



€ 46,047,000

Ministry of Infrastructure
and Water Management



€ 48,269,000

Ministry of Justice and Security



€ 1,393,000

Ministry of Education,
Culture and Science



€ 6,939,000

Provinces



€ 26,966,000

Ministry of Health, Welfare and
Sport



€ 5,490,000

Other



€ 1,633,000

Payments of policy-directed funding in calendar year 2024



About RVO



6.540 fte

employees

>200.000

clients (entrepreneurs)

Ca. 800

assignments

NSO

Netherlands Space Office

OCNL

The Netherlands Patent Office

Embassies/CG/NBSO

Homebase (NFIA/IA/...)



How we contribute

RVO support international

Promote

- information (country/market)
- Contacts / matchmaking
- branding / PR
- financial support

Protect

- Patent/IP
- Frontdesk EV (companies)
- Frontdesk KV (institutes)

Partner

- partner search
- programs
- financial support ('calls')

Supporting both **outbound** and **inbound** activities: trade, innovation, and FDI



How we contribute

RVO support international (trade)



Powering partnerships for circular batteries

Collaborating for a sustainable and resilient value chain



Netherlands



How we contribute

RVO support international (innovation)

BATT4EU Calls

TechBridge calls

MOOI25001

RenewaFLEXNL



How we contribute

RVO support international (FDI)



Netherlands Foreign Investment Agency

- › The NFIA assists foreign companies to locate in the Netherlands (and expand)
- › with customized, confidential and free support
- › Providing information, fact-finding trips,



How we contribute

RVO support international (with partners)



Kingdom of the Netherlands

TRADE AND
INNOVATE **WITH**
THE DUTCH





Netherlands Enterprise Agency

Economic Security



Paul Kruis RVO
23 September 2026, Den Bosch



*Netherlands Enterprise Agency supports
you*

What is economic security?

- ➔ • **Strengthen and protect critical, valuable and innovative business in the Netherlands.**
- **Protection against unfair competition, cyber threats, theft, coercion, unwanted foreign influence by state actors and geopolitical disruption.**

Why your enterprise deserves protection?

- ➔ • Your assets, technology, knowledge, processes and data make your enterprise unique and competitive.
- Your economic growth draws attention of investors, partners and other parties that are interested in your success.
- Your market position draws attention of competitors.

Why your enterprise deserves protection?



Examples of topics in economic security



foreign direct investment



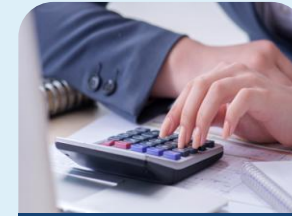
export control & strategic goods



espionage



intellectual property



procurement



foreign business trips



establishment abroad



human resources



cyber threats

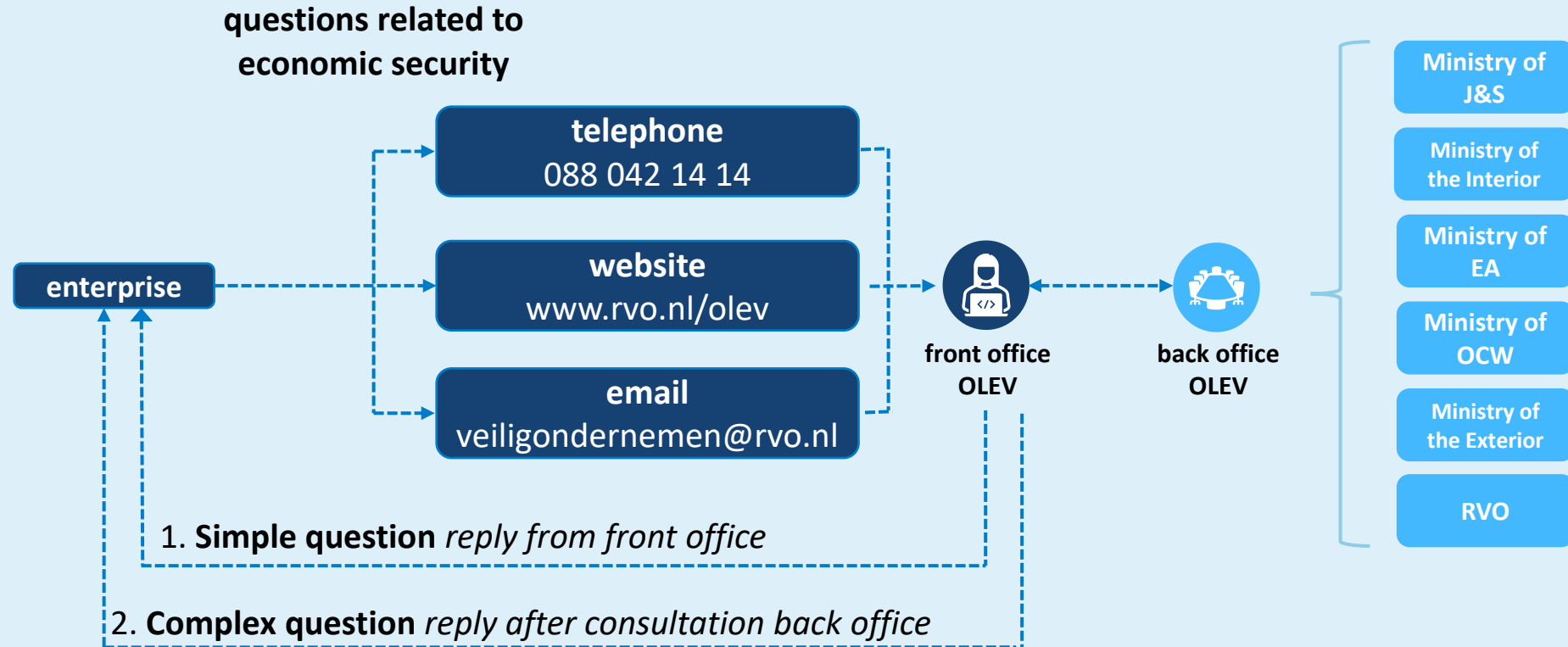
Ondernemersloket Economische Veiligheid

- ➔ • Economic security is part of national security
- Government and enterprises can achieve synergies in this (geopolitical) challenge
- Economic security is often a new topic for enterprises
- Netherlands Enterprise Agency connects enterprises with the relevant government organisations



RVO has a front office to guide you!

Procedure front office economic security





Contact Ondernemersloket Economische Veiligheid



088 042 14 14



veiligondernemen@rvo.nl



mijn.rvo.nl/ondernemersloket-economische-veiligheid



www.maakjebedrijfweerbaar.nl

Contact Loket Kennisveiligheid



088 042 62 00



info@loketkennisveiligheid.nl



www.loketkennisveiligheid.nl



Netherlands Enterprise Agency

Questions?

 **Visit our RVO stand**
in the foyer networking area



Business intelligence for the Dutch battery ecosystem

Turning fragmented ecosystem and market data into
shared intelligence

Valerio Gulino

Business Intelligence Lead

➤ Data exists. A shared picture does not (yet).



Organizations, Knowledge, KPIs and market signals exist. The challenge is connecting them into one central database.



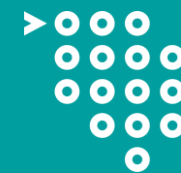
Who is active?

Where are they located?

What role do they play?

Which markets and applications?

The gap is not data availability, it is structure, validation and connection.



How Business Intelligence turns data into intelligence?



Structure inputs

Organise company, technology and market information in one controlled taxonomy.



Validate evidence

Check profiles, businesses, latest news and battery-technology claims.



Connect signals

Link roles, markets, applications and KPI-relevant ecosystem data.



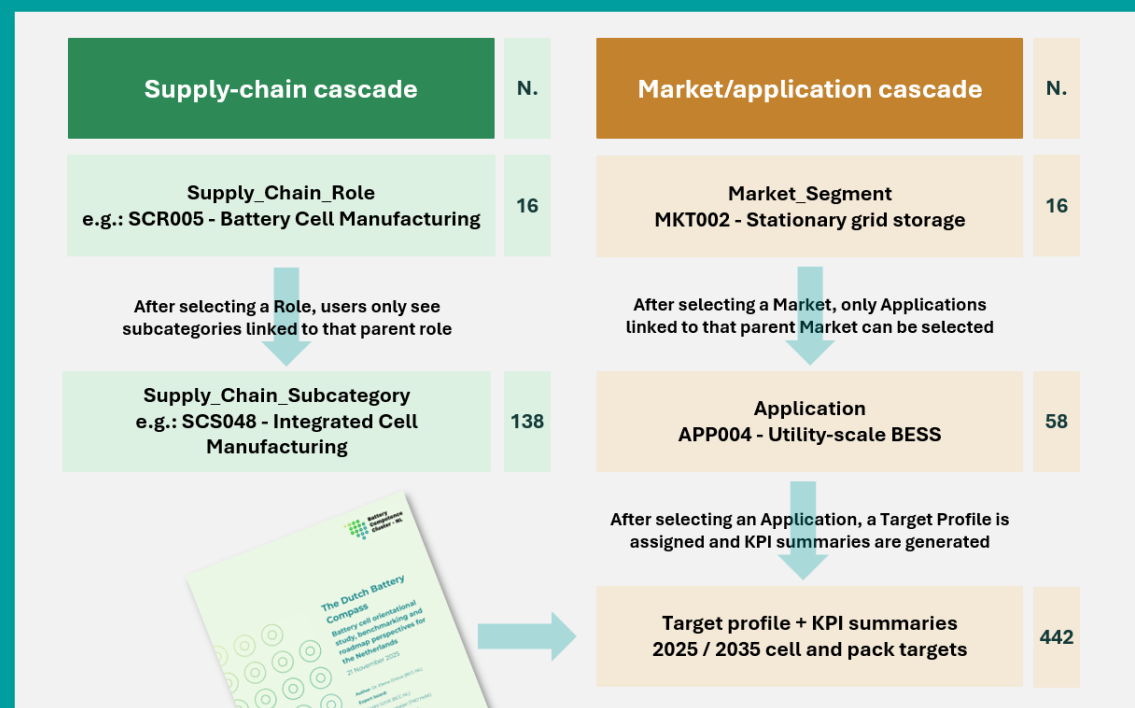
Generate insights

Turn evidence into maps, analysis, reporting and decision support.

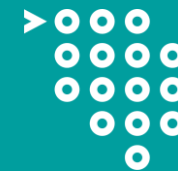


Technology understanding turns data into usable intelligence

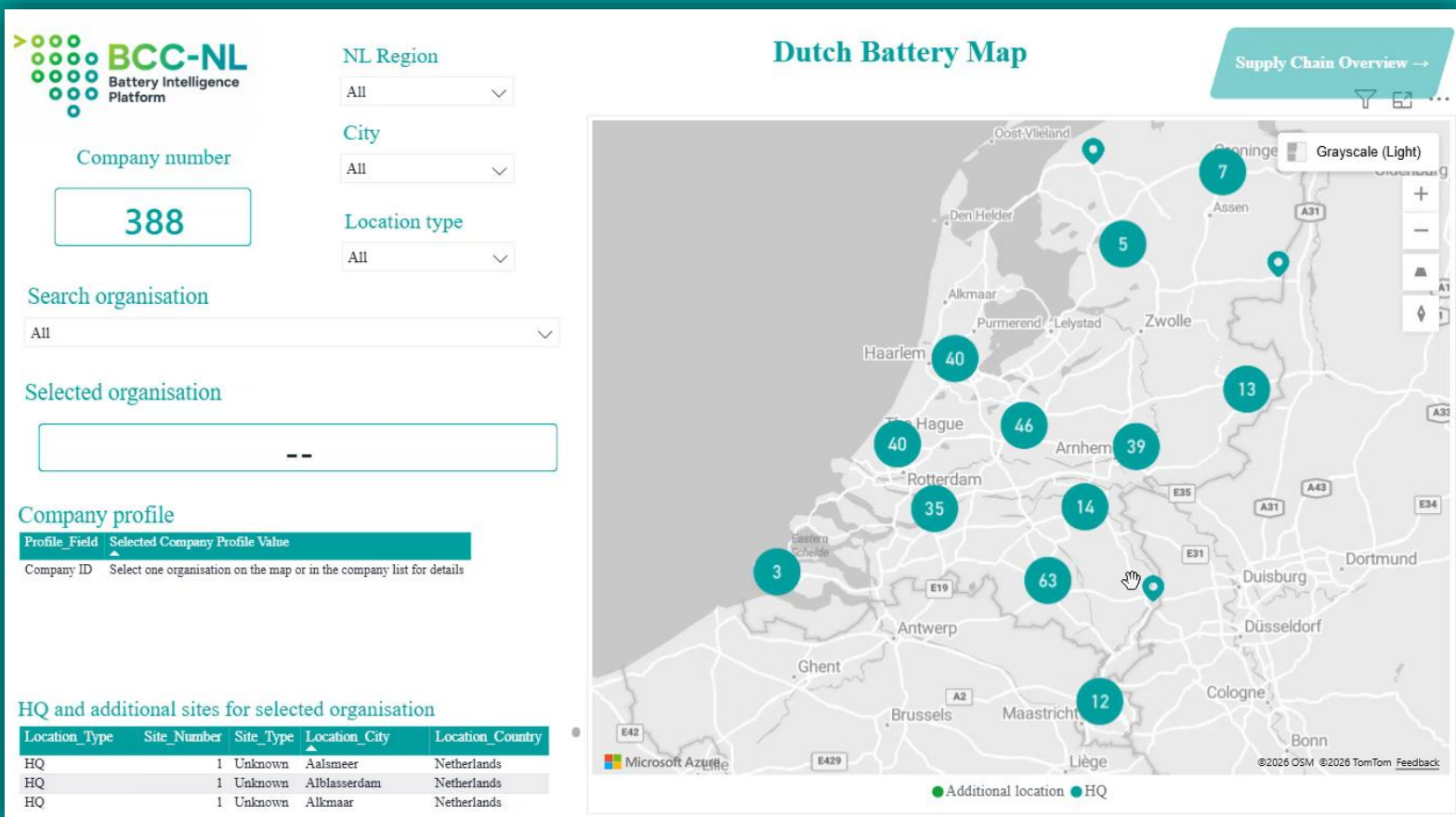
Battery expertise defines the taxonomy and how information is interpreted.
The taxonomy enables consistent classification, claim validation and integration of multiple data sources.



➤ The dashboard answers practical ecosystem questions



Searchable interface turns the intelligence database into practical ecosystem insight.



1. Which organisations are active?

Search and filter Dutch battery companies and institutes.

2. Where are they located?

Show national and regional concentration.

3. What do they cover?

Explore roles, technologies and chemistries.

4. Which Market they target?

Connect technology with market and application.

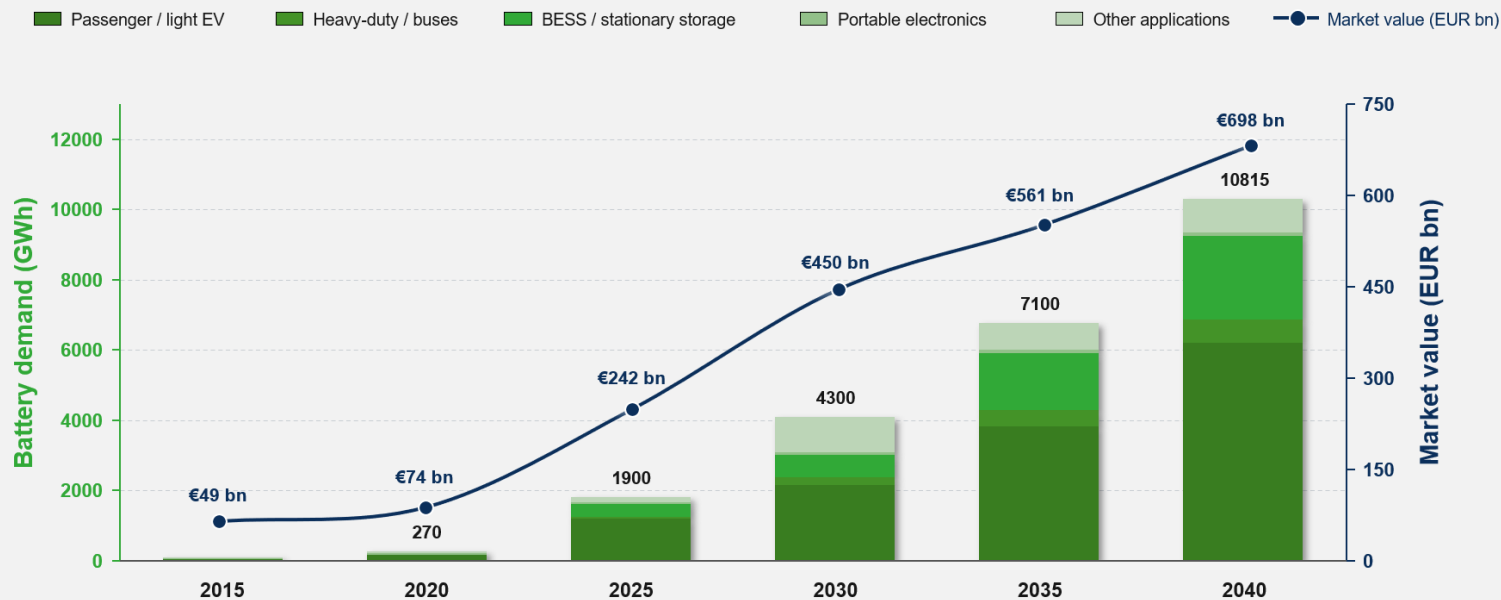


Market Analysis and Report – Example for the National Action Agenda



Global battery demand and market value - 2015–2040

Rapid electrification drives strong growth in both battery volumes and market value



Source: BCC-NL harmonised scenario based on Battery Monitor, IEA, JRC/CETO, Rhodium, McKinsey and PEM/VDMA. Market value is an indicative value-pool estimate and combines sources with different cell/pack/value-chain boundaries.



Scan to download

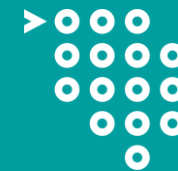


Volume market

EV demand remains the largest absolute battery-volume pool.

Growth market

Stationary storage changes the application mix and grid-flexibility agenda.



A national working group centralises battery intelligence

Kick-off completed. The group is now defining the first shared activity and a repeatable way of working.

Centralise

Bring ecosystem data, databases, data and source signals into one shared evidence base.

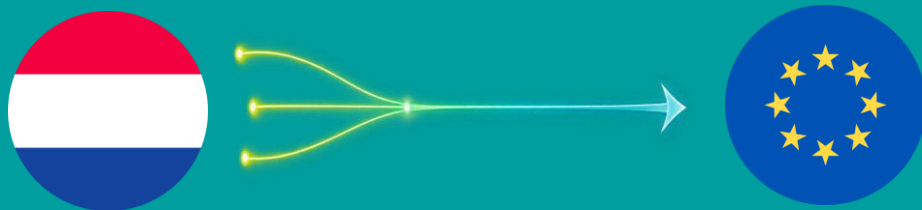
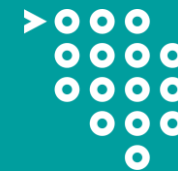
Coordinate

Align partners around common questions and source governance.

Report

Translate shared evidence into market and ecosystem intelligence.





➤ European partnerships to extend the Intelligence at European level

Dutch companies need to be visible and comparable in European intelligence platforms, while BCC-NL uses external evidence to validate and strengthen its own data



BECO Search

Ecosystem and company mapping; share Dutch ecosystem data and learn from dashboard infrastructure.



JRC Petten

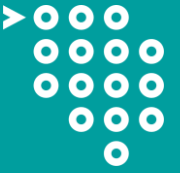
Market-data exchange and potential collaboration around future market-analysis reporting.



BATT-BRIDGE

Participation to Focus Group providing input on platform development and sustainability model.

Scan to
register



Register your organization in the
BCC-NL Battery Ecosystem



➤ Help complete the Dutch battery map

Register, validate and help us turn ecosystem knowledge into shared intelligence.

1

Register your organisation

Make sure your company or institute is visible.

2

Validate your profile

Improve classifications, technologies and market coverage.

3

Share missing information

Help close gaps and share key KPIs.

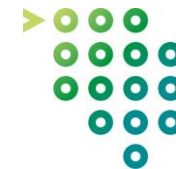


Why register

Increase your visibility, connect to opportunities and ensure your capabilities are represented in Dutch and European battery intelligence.

Thank you!
Questions?

➤ Special thanks to:



Provincie Noord-Brabant





Thank you!