EV INVESTMENT FLOWS BY COUNTRY OF ORIGIN OF AUTOMAKER

In billions of dollars

<table>
<thead>
<tr>
<th>Country</th>
<th>Origin</th>
<th>Destination</th>
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</thead>
<tbody>
<tr>
<td>Germany</td>
<td>$139.5 bln</td>
<td>$135.7 bln</td>
</tr>
<tr>
<td>China</td>
<td>57.0</td>
<td>71.7</td>
</tr>
<tr>
<td>U.S.*</td>
<td>39.0</td>
<td>34.0</td>
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<tr>
<td>Japan</td>
<td>24.3</td>
<td></td>
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<tr>
<td>S. Korea</td>
<td>20.0</td>
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<tr>
<td>France</td>
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<tr>
<td>India</td>
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<tr>
<td>UK</td>
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<tr>
<td>Sweden</td>
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</tbody>
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*U.S. includes Fiat Chrysler.
Global EV and ICE share of long-term passenger vehicle sales

Share of annual sales

- EV
- ICE

Source: BloombergNEF
Lithium-ion battery price outlook

Lithium-ion battery pack price (real 2018 $/kWh)

Source: BloombergNEF
Annual lithium-ion battery demand

Source: BloombergNEF, Avicenne
European production potential of lithium-ion batteries

- TERRAE
- CATL
- TESLA
- SK Innovation
- northvolt
- LG Chem
- SAMSUNG
- GS YUASA
Investments in lithium-ion batteries in Poland

**SK Innovation | Dąbrowa Górnicza**
- Separators for lithium-ion electric vehicle batteries
- The value of the investment: PLN 1.4 bn (ca. USD 360 mn)
- Commencement of production: 2021

**Daimler | Jawor**
- High voltage batteries for electric cars from the EQ line
- 300 new work places
- Commencement of production: beginning of the new decade

**LS EV Poland | Dzierżoniów**
- Electronic components for electric vehicle batteries
- The plant will be able to supply components for 1 million electric cars per year
- Commencement of production: 2019

**Impact Clean Power Technology | Warsaw**
- Battery systems for electric vehicles
- The company supplies battery systems to markets in Poland, the United States, Germany, Spain, Turkey, and Italy
- The customers for the company’s batteries include manufacturers of electric buses such as Solaris, Irizar, and Temsa

**Northvolt | Gdańsk**
- Battery modules
- Initial capacity: 10,000 modules per year
- Reaching the target capacity: in 2021

**BMZ | Gliwice**
- Batteries for buses, scooters and electric bicycles
- The value of the investment: EUR 9 million
- Commencement date: 2017

**PCC Rokita i Shida | Brzeg Dolny**
- Organic carbonates for electric vehicle batteries
- Initial production value: 20,000 tonnes per year
- Value of the first stage of the investment: EUR 22 million