



APRICUM

THE CLEANTECH ADVISORY.



What Happened Since We Last Met – Kicking Off the Decade of Energy Storage

Florian Mayr, ees Committee Chairman

Munich, October 6, 2021

Long time, no meet...



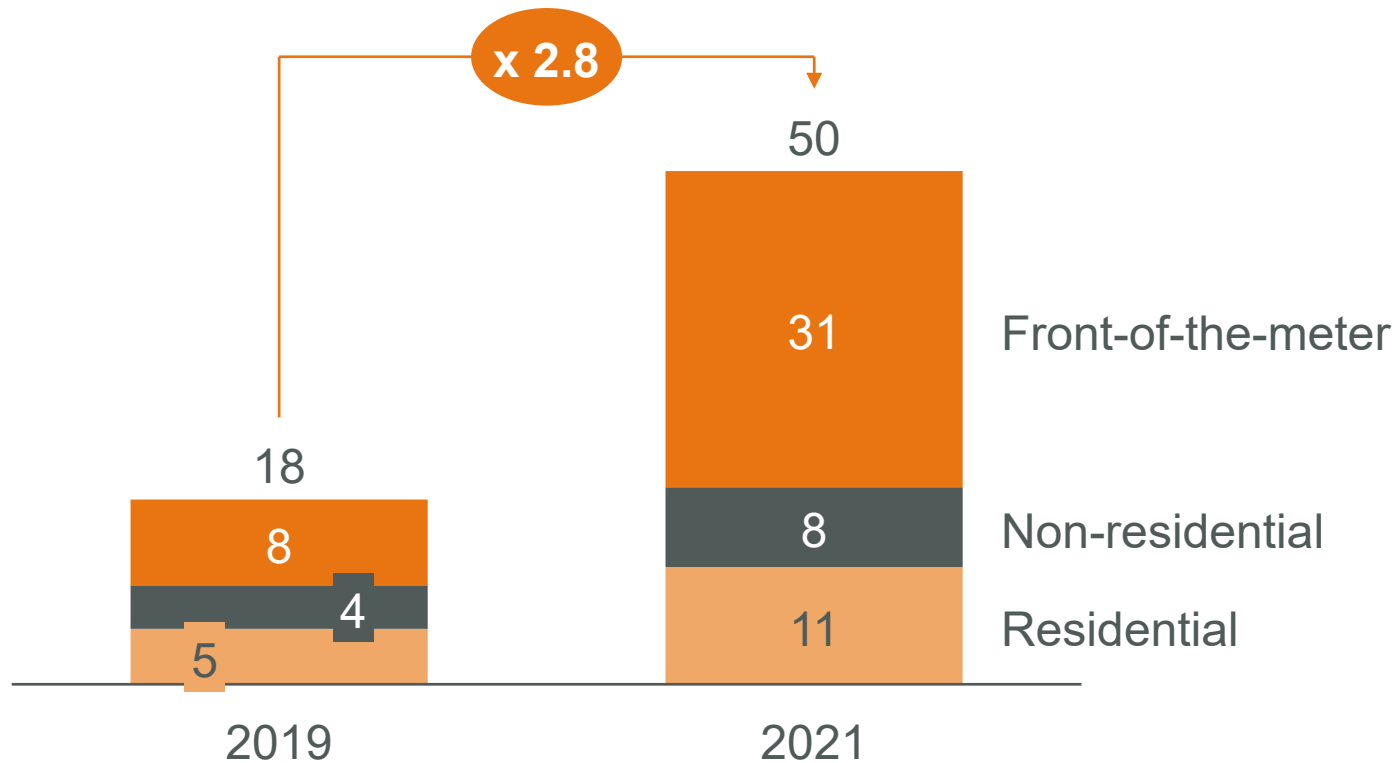
days since the last ees

A lot of things have changed since then.



Also energy storage did not stand still...

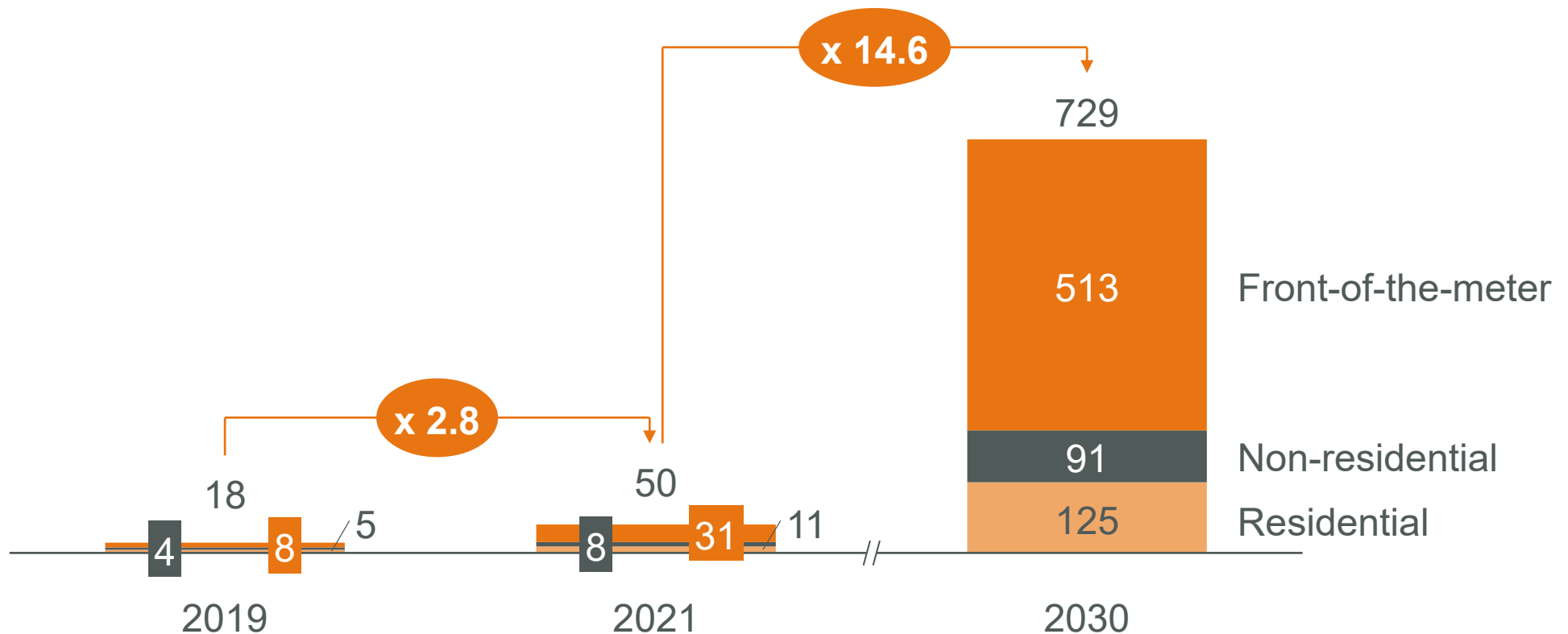
Global energy storage cumulative deployments¹ [GWh]



Source: Wood Mackenzie; 1) Excluding pumped hydro

...and will continue to move the energy world.

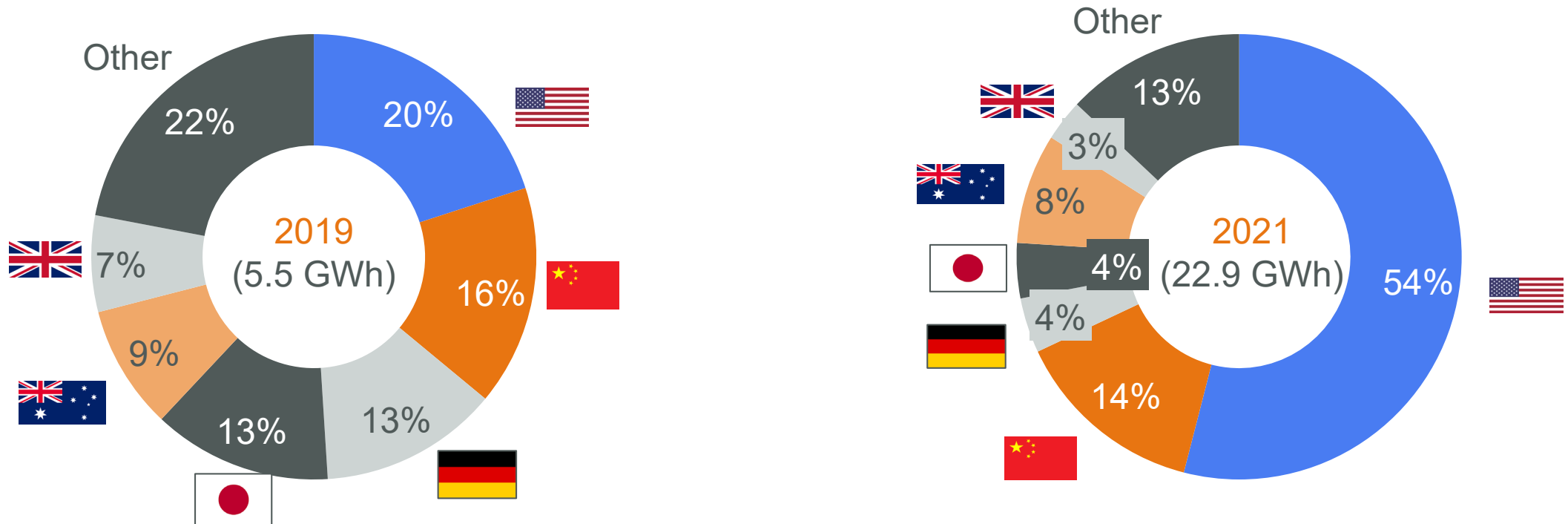
Global energy storage cumulative deployments¹ [GWh]



Source: Wood Mackenzie; 1) Excluding pumped hydro

Some markets have grown faster...

Share of annual global energy storage deployments¹

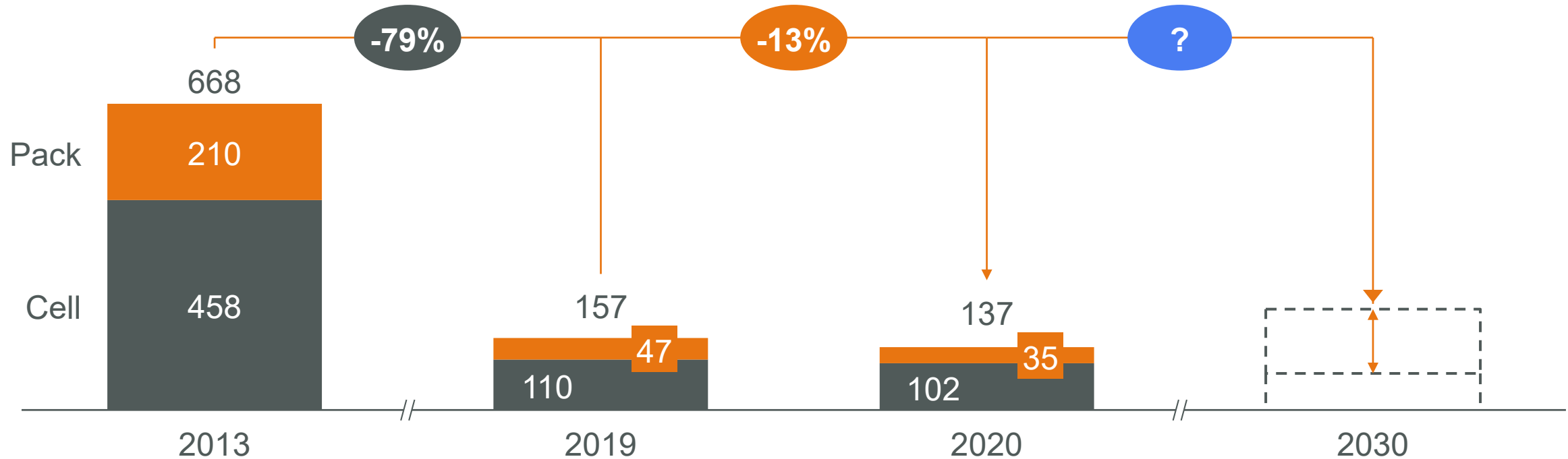


...but where will the future action be?

Source: Wood Mackenzie, Apricum; 1) Excluding pumped hydro

Competitiveness has further improved...

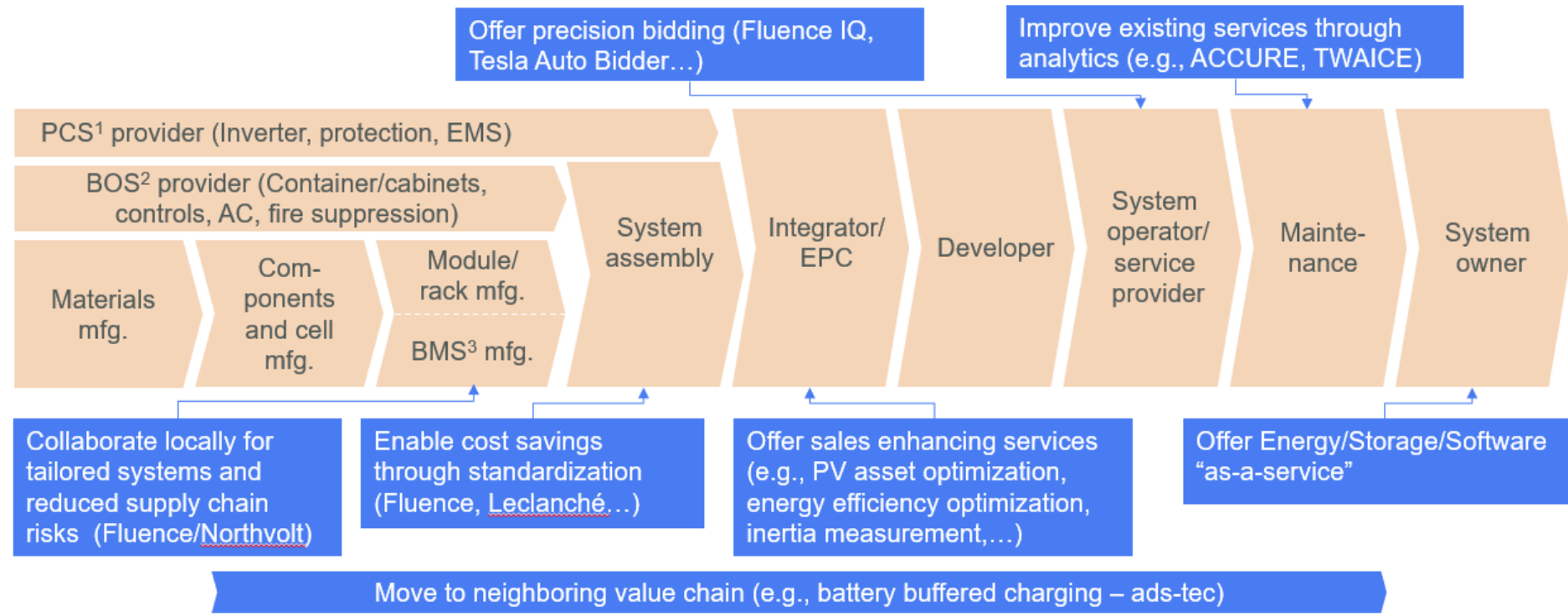
Volume-weighted average Li-ion battery pack and cell prices, real 2020 USD/kWh



...but what is driving the falling costs?

Source: BNEF, Apricum

Business models continue to evolve...



...but which ones are the most successful?

Source: Apricum

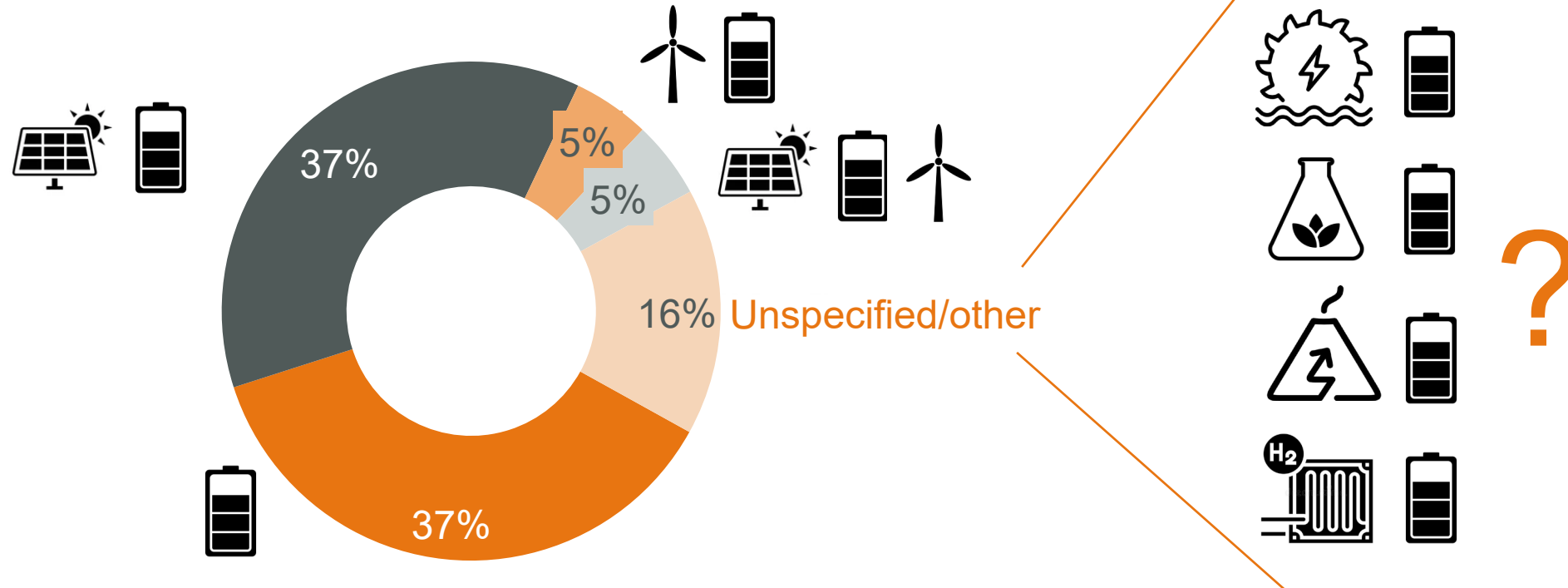
More scrutiny of batteries to get greener...



...but what are the implications?

Love story of PV, wind & storage unbroken...

Global FTM project pipeline by pairing power technology, 1978–2027



...but what are the next dream couples?

Source: Wood Mackenzie, Apricum

Enjoy the conference!



Wednesday Oct 6

- Market Overview – Where the Action is, Today and Tomorrow (9.30 – 11 AM)
- Competitiveness – Exploring the Falling Costs of Energy Storage (11.00 – 12.30 PM)
- Business Models – How to Stay Successful in a Maturing Market (2.30 – 4.00 PM)
- Sustainable Batteries – Impact on the Market (4.30 – 6.00 PM)

Thursday Oct 7

- Leading the Charge: EES for Residential and C&I PV Systems (9.00 – 10.30 AM)
- A formidable Team: Utility-scale PV and EES (11.00 – 12.30 AM)
- Hybrid Power – Combining Energy Storage with Non-PV Generation (2.00 – 3.30 PM)