Canada's New Economic Engine

Modelling Canada's EV battery supply chain potential - and how best to seize it

October 12, 2022

CLEAN ENERGY CANADA

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New research and industry-led work to advance Canada's battery advantage

1. **Battery Supply Chain Report** - Quantify Canada's battery opportunity and identify where we're best poised to compete

2. **Canadian Battery Taskforce Blueprint** - Build a plan to fully unlock it

New research on the size of the battery prize and what is needed to unlock it

CEC partnered with Trillium Network for Advanced Manufacturing to look at Canada's EV battery supply chain to:

1. Quantify job potential and economic opportunity at each stage of by 2030
2. Highlight Canada's top opportunities
3. Identify the measures most needed to unlock opportunities at each of those stages (e.g. investment, talent, land).

TRILLIUM NETWORK
FOR ADVANCED MANUFACTURING

Canada's battery opportunity is significant but requires government action

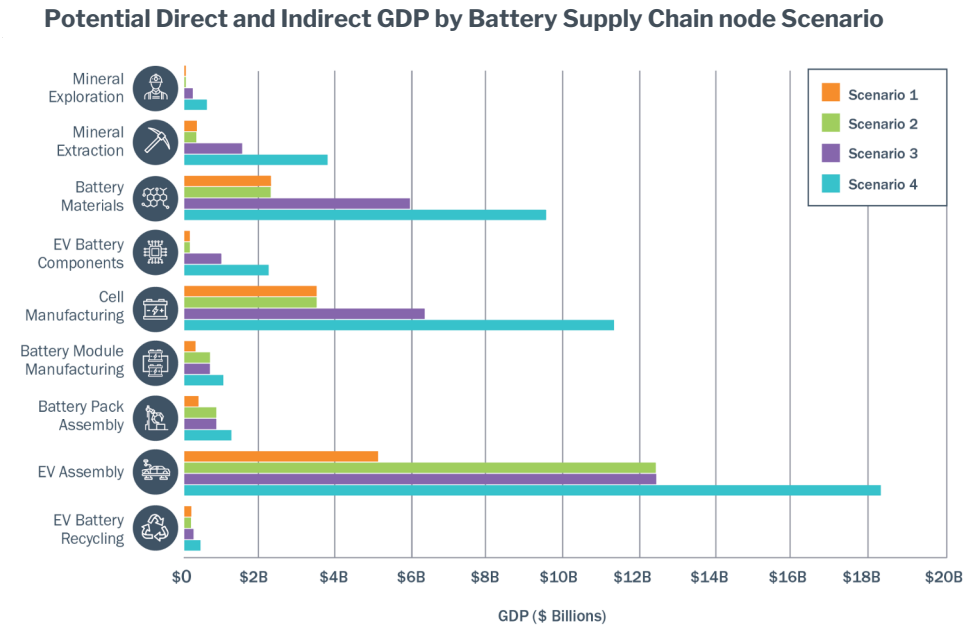
Scenario 1: Existing investments

- **60,000** direct + indirect jobs
- **$12 billion** direct + indirect GDP

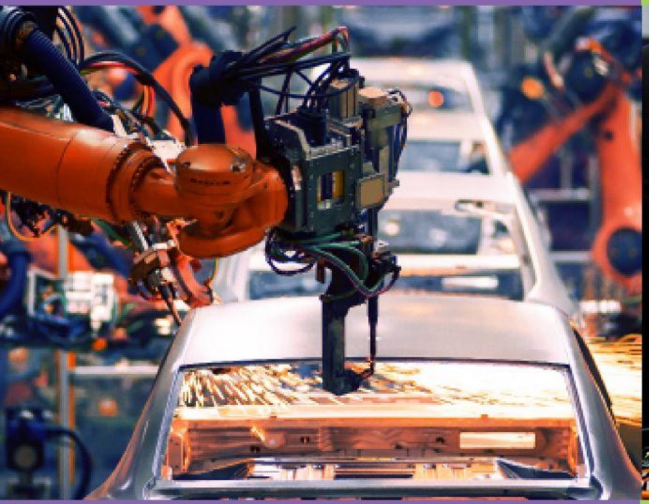
VS

Scenario 4: Smart, fast government action

- **250,000** direct + indirect jobs
- **$48 billion** direct + indirect GDP



Areas with greatest potential for Canada



1 EV assembly

2 Cell manufacturing

3 Clean, integrated battery materials industry

Canada's work to-date

Canada has the ingredients needed to build a successful battery industry, and has made good progress to-date:

- $3.8 billion & Centre for Excellence for Critical Minerals Strategy & R&D
- $8 billion for the Net Zero Accelerator Fund- battery innovation and industrial ecosystem stream
- 50% corporate tax incentive for zero-emission technologies
- 100% zero-emission vehicle sales mandate by 2035 commitment

SELECT CANADIAN EV BATTERY SUPPLY CHAIN INVESTMENTS
2020–JUNE 2022

	COMPANY	LOCATION	VALUE
EV Assembly	Ford	Oakville, ON	$1.8B
	General Motors	Ingersoll, ON	$1B
	Stellantis	Windsor, ON / Brampton, ON	$3.6B
	Nova Bus	St. Eustache, QC	$185M
EV Battery	Lion Electric	Mirabel, QC	$185M
	Stellantis-LG	Windsor, ON	$5B
Battery Materials	General Motors-POSCO	Bécancour, QC	$500M
	BASF	Bécancour, QC	Undisclosed
	Nouveau Monde Graphite	Bécancour, QC	$15M
	Electra Battery Materials	Cobalt, ON	$84M
Battery Components	Solus Advanced Materials	Bécancour, QC	$450M
	Magna	St. Thomas, ON	$50M
Battery Recycling	Lithion Recycling	TBD, QC	$125M

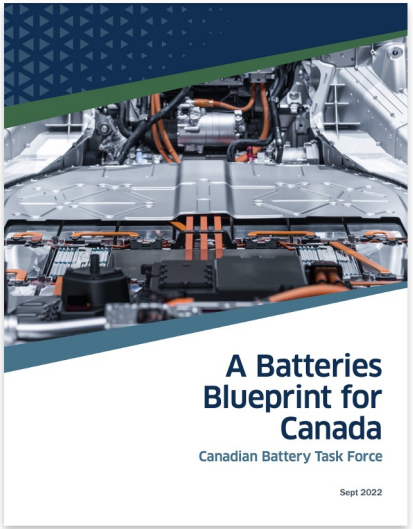
To achieve maximum impact, a consistent playbook has emerged

The most successful jurisdictions in securing battery investments (US, EU, QC) — have all developed a critical mineral strategy and a **public-facing battery plan** that channels government and private action and investment into **key areas.**

Industry support for a batteries blueprint

Canadian Battery Task Force: experts from across the supply chain

accelerate Canada's ZEV Supply Chain Alliance
APMA LEAD. REACH. CONNECT.
BlueSolutions BOLLORÉ
BMAC Battery Metals Association of Canada
CLEAN ENERGY CANADA
ELECTRIC MOBILITY CANADA / MOBILITÉ ÉLECTRIQUE CANADA
gm
LION
Lithion Lithium-ion battery recycling
The Mining Association of Canada | L'association minière du Canada
MOLICEL
propulsion Québec
The Transition Accelerator
TRILLIUM NETWORK FOR ADVANCED MANUFACTURING
UNIFOR theUnion | lesyndicat



Developed priorities that can form the basis of a public-facing plan = **A Batteries Blueprint for Canada**

Track the energy transition

Each Monday we publish the Clean Energy Review, a free weekly digest of must-read climate and clean energy stories from across Canada and around the world.

For follow-up questions, contact:

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