The new industrial age

Tailored electrification pathways for Europe's industrial competitiveness

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Why electrification matters

Resilience benefits

370Bn€

in 2023 and 2024, fossil fuel imports cost

Climate impact

160Bn€

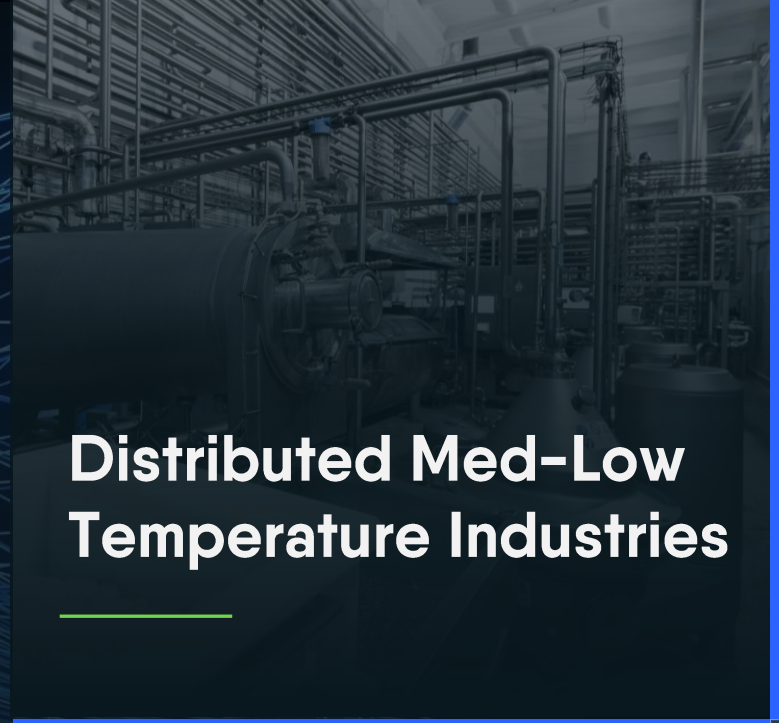
between 2021 and 2023

Technology Leadership

+30%

global market share for heat pumps by 2030

Archetypes & Key Findings



Distributed Med-Low Temperature Industries

20% - 30%

Cheaper in Base case scenario

6% - 12%

Cheaper in Best case scenario

Concentrated High Temperature Industries

The Path Forward

Technology

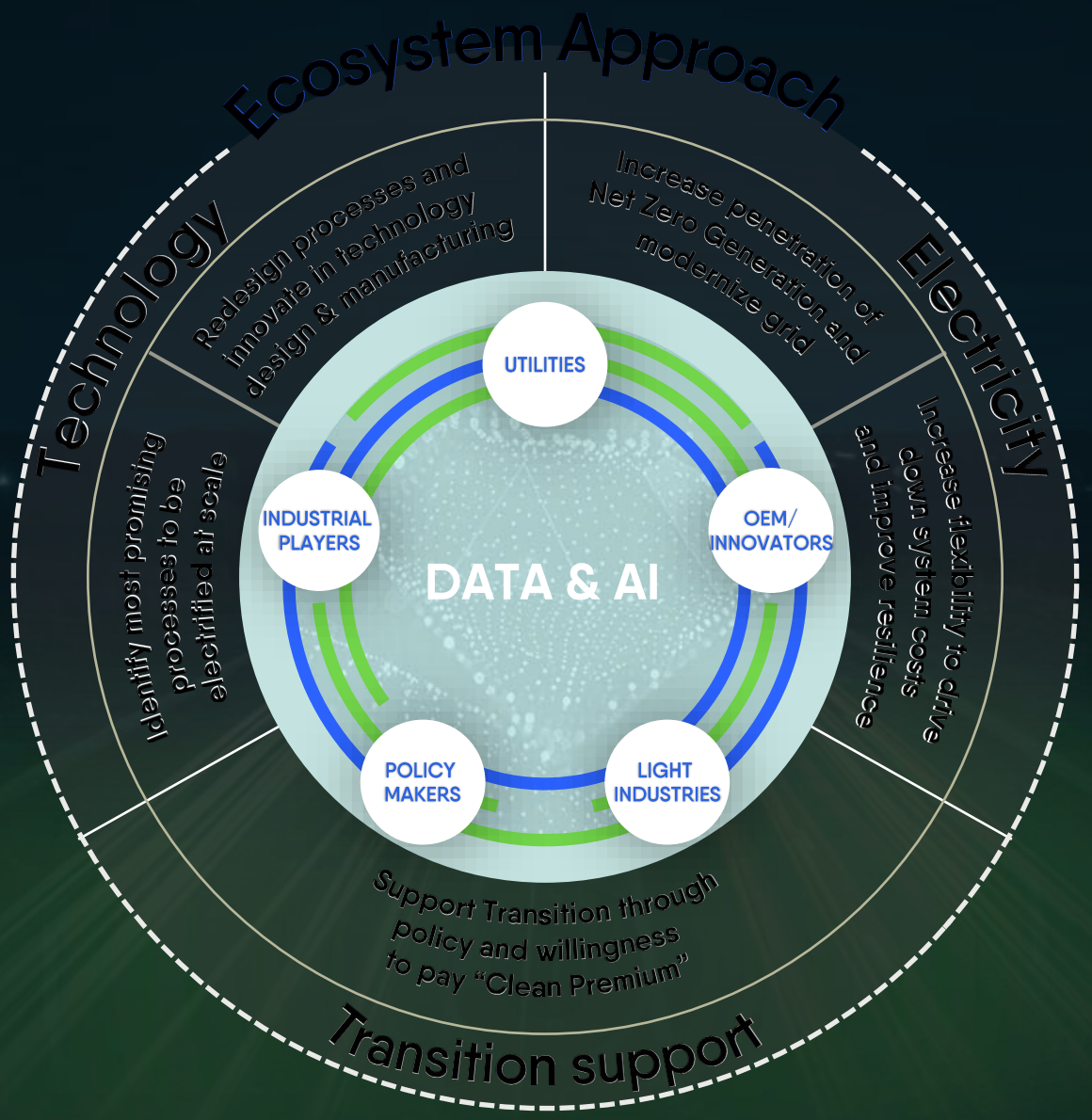
Identify most promising processes to be electrified at scale

Redesign processes and innovate in technology design & manufacturing

Electricity

Increase penetration of Net Zero Generation and modernize grid

Increase flexibility to drivedown system costs and improve resilience


Ecosystem Approach
Technology
Redesign processes and innovate in technology design & manufacturing
Electricity
Increase penetration of Net Zero Generation and modernize grid
Identify most promising processes to be electrified at scale
Increase flexibility to drive down system costs and improve resilience
UTILITIES
INDUSTRIAL PLAYERS
OEM/ INNOVATORS
DATA & AI
POLICY MAKERS
LIGHT INDUSTRIES
Support Transition through policy and willingness to pay "Clean Premium"
Transition support

Resilient Decarbonised Competitive

Thank you for your attention!

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