

## 16<sup>th</sup> September – Day 1

- 09:45**     **Pre-Conference workshop**
- 17:30**     **Demystifying Policy, Regulation & Sustainable Practices for the European Battery Supply Chain<sup>1</sup>**  
*This workshop includes expert speakers, interactive sessions, refreshment breaks and networking*
- 17:30**     **Pre-Event Welcome Drinks & Networking (Open to All)**  
*Location: The Grand Ballroom Show Floor*

## 17<sup>th</sup> September – Day 2

- 06:30**     **BRM Run Club – 5k Run in Amsterdam**
- 07:30**     **Registration & Networking Coffee**
- 07:30**     **Exclusive CEO Networking Breakfast (Invite Only)**  
*Join us for an exclusive fireside chat as Fastmarkets CEO Raju Daswani interviews Emanuel Proença, CEO of Savannah Resources, on the strategic leadership and challenges in the evolving battery materials sector. Emanuel will discuss steering the Barroso Lithium Project, positioning Savannah Resources in Europe’s energy future, and the leadership needed to navigate industry transformation and drive sustainable growth.*  
*Location: Cerre Restaurant*

## Main Stage

- 08:40**     **Opening Remarks**  
*Speaker to be confirmed*
- 08:45**     **Welcome Address**  
**Raju Daswani**, Chief Executive Officer, **Fastmarkets**
- 09:00**     **European Commission**  
**Paving the Way to 2030: A Strategic Overview of the Critical Raw Materials Act**
  - Contextualising the act as Europe strives towards achieving its EV, ESS and renewable energy
  - Progress to date and future milestones
  - Navigating the targets and their various components
  - Assessing the impact on the European supply chain
  - 2030 and beyond: Envisioning the future battery supply chain**Joaquim Nunes de Almeida**, Director for Mobility and Energy Intensive Industries, **European Commission**

<sup>1</sup> An additional fee is payable to attend this workshop & it is not included as part of the two-day conference pass

**09:25***Moderator: Paul Lusty, Head of Battery Raw Materials, Fastmarkets***Executive Panel****Catalysts for Sustainable Growth in Europe's Critical Minerals Production**

- Will Europe establish commercially viable and scalable midstream capacity?
- How can midstream players collaborate effectively with upstream and downstream parties?
- Domestic sourcing VS international purchasing: Insights, strategies and goals
- Closing the supply chain loop: Establishing a mutual understanding across the supply chain from mining companies to OEMs
- Identifying future supply chain risks – from geopolitical tensions to election outcomes... how can we learn from the past and better prepare for the future?

**Hannu Hautala**, Chief Executive Officer, **Keliber****Chad Blewitt**, Managing Director, Jadar Project, **Rio Tinto****Yann Teste**, Global Vice President, Purchasing – New Technologies & Global Categories, **Volvo****Construction Equipment****Stina Torjesen**, Vice President – Sustainability, **Morrow Batteries****10:10****Presentation****A Critical Moment in the Evolving EV Supply Chain**

*The European battery supply chain is facing a time of risk and uncertainty: What we do now determines the future of resilient, sustainable supply chains for EV demand for Europe and beyond. What will it take to navigate the current environment and prepare for long term growth?*

**Anita Natesh**, Regional Vice President, North America, Europe, Middle East & India – Lithium, **Albermarle**

## Main Stage

**10:25** Moderator: **Ellen Carey**, Chief External Affairs Officer, **Circular Fireside Chat**  
**Travelling to a time of transparency: How Feasible is the Battery Passport?**

- Overview of the battery passport pilot and framework
- Battery supply chain compliance
- Navigating opportunities and risks
- Sustainable and responsible sourcing
- Examining the real-term impact on business investment and cost
- How might the battery passport evolve?
- What does good look like?

**Stina Torjesen**, Vice President – Sustainability, **Morrow Batteries**

**10:50** **Networking Break**

## BRM Innovation Stage

**10:20** **Presentation**

### Recycling and Black Mass Outlook

- 10-year outlook
- Availability of scrap battery & black mass by region, and battery chemistry
- Recycling capacities and supply and demand balance
- Impact of battery metal prices on black mass trade flows and prices

**Andre Cortesao**, Research Analyst, Battery Raw Materials – Recycling, **Fastmarkets**

**10.45** **Presentation**

### Carbon Neutral & Socially Sustainable Lithium: Preparing for the Battery Passport in the EU

*As Europe demands increased transparency and sustainability in its product supply chains, it will create challenges for suppliers. Addressing these issues while keeping costs low will require a shift in how business is conducted in critical minerals. Sigma Lithium and Brazil are positioned to drive a new supply chain; one that is auditable, green, sustainable and, importantly, capital and cost efficient.*

**Ana Cabral**, Chief Executive Officer, **Sigma Lithium**

- 11:20** **Presentation**  
**EV Battery Demand Outlook**
- Market forecast for European and global EV sales, production and battery demand
  - Chinese EV export surge to Europe
  - Supply and demand for key battery chemistry trends
  - Overview of EU tariffs on Chinese Evs
  - Are Chinese companies gearing up for market entry?
- Phoebe O'Hara**, Senior Analyst – **Energy Transition**, **Fastmarkets**
- 11:40** **Moderator: Andrea Hotter**, Special Correspondent, **Fastmarkets**  
**Panel**  
**European Investment Strategies: What are European Investors in Search of?**
- Critical minerals investment strategies
  - Alternative financing strategies for new processing plants and critical metal projects
  - What could impact access to capital?
  - What does good look like?
- William Labat-Labourdette**, Managing Director – Transition Minerals, Metals & Batteries, **BNP Paribas**

- 11:05** **Moderator: Kirstyn Petras**, Senior Price Reporter, **Fastmarkets**  
**Panel**  
**How Must the European Recycling Market Evolve to Compete Internationally?**
- Challenges and delays from regulations
  - Lack of Government funding in comparison to the US IRA
  - Leakage of scrap batteries and black mass to Asia
  - Lack of cell production in Europe prevents closed loop battery market
  - Overcapacity for shredding and undercapacity for refining
- Elewout Depicker**, VP, Commercial & Corporate Development EMEA, **Li-cycle**  
**Guillermo Espiga**, VP, Head of Business Development, **Nth Cycle**  
**Henrik Sylve**, Director of Commercial Recycling, **Northvolt AB**  
**Rohit Kumar**, Director – Global Industries Group (EV and Battery Sector), Investment Banking, Transition Finance, **Standard Chartered**
- 11:55** **Presentation**  
**The Barroso Lithium Project: Developing Europe's Largest Spodumene Lithium Project**
- What makes Savannah's Barroso the largest spodumene deposit in the EU and what growth potential does it offer?
  - How will Barroso strengthen Europe's lithium battery supply chain and energy independence?
  - What environmental strategies is Savannah Resources implementing at Barroso?
  - What are the next development steps and how will the Project's socio-economic be shared with the stakeholder?

**Csaba Bellay**, Director, **Societe Generale Corporate and Investment Banking (SGCIB)**  
**Robert Baylis**, Portfolio Manager, **InnoEnergy**

*Moderator:* **Raju Daswani**, Chief Executive Officer, **Fastmarkets**  
**Battery Pitch Battle**

*4 startup companies from across the mining, anode, cathode, and battery landscape will pitch their new business ideas to a panel of senior investors and venture capitalists. The investors will use valuation techniques to debunk or concur with the owner's valuation and decide whether they wish to grant them funding in return for an ownership stake. Only one will leave a winner.*

**12:25**

- Are you a European startup in the battery landscape?
- Are you looking for investment?
- Are you prepared to take to the stage in front of our panel of investors?

**Investor panel:**

**Csaba Bellay**, Director, **Societe Generale Corporate and Investment Banking (SGCIB)**

**Vincent Veron**, Low Carbon Transition Group, **BNP Paribas**  
**Bram Sprangers**, Investment Manager – Climate Tech & Energy, **Investment-NL**

**Rohit Kumar**, Director – Global Industries Group (EV and Battery Sector), Investment Banking, Transition Finance, **Standard Chartered**

**Startup pitches:**

**Casper Peeters**, Chief Executive Officer, **E-magy**  
**Sarah Montgomery**, Chief Executive Officer & Co-Founder, **Infyos**

**Emanuel Proença**, Chief Executive Officer, **Savannah Resources**

**12:10-12:55**

*Moderator:* **Solomon Cefai**, Price Reporter, **Fastmarkets**  
**Panel**

**“Not in My Backyard”: Is Europe Mining it’s way to a Greener Future or Local Community Backlash?**

- Evaluating the social license to operate for mining projects
- Exploring NIMBY challenges across Europe
- Balancing the risks and benefits of European mining initiatives
- Strategies for engaging with local communities and stakeholders
- What does the future hold?

**Chad Blewitt**, Managing Director – Jader Project, **Rio Tinto**  
**Adele Rouleau**, ESG and Critical Minerals Lead, **SFA Oxford**  
**Cris Monero**, Chief Executive Officer and Managing Director, **Vulcan Energy Resources**  
**Lucy Crane**, ESG & Sustainability Manager, **Cornish Lithium**

**13:00-13:15**

**Presentation**

**Lithium’s role and Environmental Challenges in New Energy Industries**

- Exploring the surge in lithium demand driven by EV, ESS, and consumer electronics
- How will lithium play a critical role in power batteries and the technological advancements fuelling its growth?
- Assessing the environmental pollution and ecological damage linked to lithium extraction, and appropriate

**13:30**   **Networking Lunch**

sustainable practices to mitigate the negative impacts of large-scale extraction and processing  
**Wang Can**, Overseas Business Manager, **Sunrise SNE**

**13:20-13:35**   **Presentation**

**Sodium Sulphate – Problem or Opportunity?**

*The production of sodium sulphate from the battery materials industry has often been referenced as a barrier to entry, cited as driving the ecological and economical scale off balance for producers. What are the options to overcome these challenges and create opportunities for breaking down the barriers?*

- What flowsheets/processes produce Sodium Sulphate? Spodumene/pCAM/Battery Recycling
- Economic considerations for various options: sell as raw material for detergent/waste disposal/crystallisation/SOP fertiliser conversion/conversion to acid/caustic
- Optimising the flowsheet to minimise waste, maximise product yield and profit.

**Karel Vratny**, Thermal Solutions and Battery Materials – EMEA, **Veolia**

**13:45**   *Moderator:* **Philipp Wunderlich**, Battery Technology Consulting Lead, **Accenture**

**Panel**

**Can Europe Achieve Independence in Midstream Battery Production?**

- Assessing the Prospects of Chinese EV Tariffs: How will potential tariffs affect Europe's battery production landscape?
- What are the implications of China's ambitious plans for the European EV market?

## 14:30 **Presentation**

### **Lithium Market Outlook**

- Supply and demand global and regional outlook
- What's the impact of the current price environment on project development in the EU?
- Is the EU focussing too heavily on hydroxide?

**William Adams**, Head of Base Metals & Battery Research, **Fastmarkets**

## 14:50 *Moderator: Andrew Leyland, Managing Director, SC Insights* **Panel**

### **What Is Required to Develop Sustainable Battery Raw Materials in Europe?**

- What innovations and policies are driving Europe's battery value chain?
- How can new mining projects overcome sustainability challenges and seize opportunities?

- What could happen if Chinese EVs are allowed to dominate the European market?
- European Production Capabilities: Can Europe scale up production of pCAM, CAM, AAM, separators, and electrolytes to meet its needs?
- What does the future hold for Europe's midstream battery production and overall EV market?

**Wolfgang Bernhart**, Senior Partner, **Roland Berger**

**Henning Flaig**, VP Commercial & Asset Ownership Circular Solutions, **Norsk Hydro**

**Aleksandra Roganović**, Cell Materials Manager, **ElevenEs**

## 14:35 **Presentation**

### **Next Generation Battery Technology Deep Dive: What will be Next in Europe?**

- Overview of next generation battery chemistries in Europe
- The race to solid state: what does the future hold?
- How does sodium-ion fit into the equation?
- How will Europe commercialise next generation batteries?

**Nicolo Campagnol**, Battery Insights Director, **McKinsey**

## 15:00 **Presentation**

### **Asia Battery Market Outlook**

- EV battery market growth and opportunities in Asia
- Development of the Chinese EV industry
- Exploring Chinese investment overseas

**Phoebe O'Hara**, Senior Analyst – Energy Transition, **Fastmarkets**

- Can Europe reduce its dependency on imported materials and strengthen its supply chain?
- What domestic resources are available, and what must we import to meet demand?
- Where will Europe find eco-friendly and ethical battery materials globally?

**Christian Barbier**, Founder and Director, **CRB Resources**

**Cormac O’Laoire**, Managing Director, **Electrosis**

**Tobias Abt**, Manager Raw Material Procurement and Strategic Market Development, **Mercedes-Benz AG**

**Lydia Bridges**, Senior Sustainability Consultant, **Minviro**

**15:35** *Moderator:* **Callum Perry**, Strategic Markets Editor – Energy Transition, **Fastmarkets**

## Panel

### Will Europe Gain Self-Sufficiency in Lithium Refining?

- What does the future look like for Europe’s Lithium Projects?
- How will Europe ensure high purity refining?
- Material availability
- What does the future hold?
- Is Europe willing to pay more for non-Chinese supply?
- What role does the rest of the supply chain play in maintaining security?

**Thomas Beck**, Chief Commercial Officer, **Keliber**

**Sean Sargent**, Chief Executive Officer, **Green Lithium**

**Tony Sage**, Chief Executive Officer, **Critical Metals**

**Martin Steinbild**, General Manager – Europe, **SCT**

**15:20** **Presentation**

### Building a Lithium Refinery in Portugal: The Aurora Project

*Session details coming soon*

**Manuel de Sousa Martins**, Chief Executive Officer, **Aurora Lithium**

**Tobias Wabtniz**, Chief Commercial Officer, **Aurora Lithium**

**15:35** **Presentation**

### Delivering Next Generation DLE

- Lowest footprint approach to Direct Lithium Extraction.
- Environmental impacts of lithium extraction and the opportunity for DLE
- What does it take to transition DLE from a promising concept to large-scale industry contribution?
- Factors to consider when choosing a commercially viable DLE technology

**David Deak**, Chief of Strategy, **ILiAD**



**15:50 Presentation**  
**Determining the Carbon and Water Footprints of Lithium Products**

- What is the product carbon footprint guidance?
- How could determining carbon and water footprints help boost your business strategy?
- Developing a product water scarcity footprint guidance

**Roland Chavasse MBA**, Secretary General, **International Lithium Association (ILiA)**

**16:15 Networking Break**

**16:45** Moderator: **Przemek Koralewski**, Global Head of Market Development, **Fastmarkets**

**Panel**

**How will the Lithium Market Develop? Exploring Pricing Mechanisms and Risk in an Evolving Ecosystem**

- What are the prevailing pricing mechanisms in today's lithium market, and how well do they serve the industry's needs?
- How could the quality of pricing be improved to better reflect the realities of the lithium market?
- How are developments in the market ecosystem changing the approach of supply chain participants to the issue of price risk?

**Peter Hannah**, Global Product Pricing Manager, **Albemarle**

**Anna Chadwick**, Head of Battery Metals, **Freight Investor Services (FIS)**

**Ian Caton**, Director Metals Production, **CME group**

**Tobias Abt**, Manager Raw Material Procurement and Strategic Market Development, **Mercedes-Benz AG**

**16:35 Presentation**  
**Innovative Approaches to Sustainable Battery-Grade Metal Sulfates Production**

- KBR's Battery Metal Extraction & Purification Technology MetEx and its relevance in key industries
- Evaporation and Crystallization (E&C) solutions for critical minerals production
- Success stories and outline strategies for de-risking projects to ensure successful scale-up

**Jose Ramos**, Business Development Manager – Inorganics Technology Solutions, **KBR**

**16:55 Presentation**

**European Gigafactory and Supply Chain Outlook**

- Overview of gigafactories in Europe
- Projected growth forecast
- Key drivers and challenges for gigafactories in Europe
- What can we learn from China & US? (co-locating cathode and anode production, chemistries of the future, securing the supply chain)

**Iveta Zagorova, Manager – Research Analysts, Fastmarkets**

**17:30 Champagne Roundtables**

*Join one of the following 8 roundtable discussions led by Fastmarkets experts to discuss the issues that matter now while the champagne flows.*

**17:30 Networking Drinks**

## 18<sup>th</sup> September – Day 3

<b>07:30</b>	<b>Networking Breakfast</b>
<b>07:30</b>	<b>Inclusivity Forum: Gender Diversity in the Battery Industry</b>
<b>Main Stage</b>	
<b>08:45</b>	<b>Welcome Address</b>
<b>08:50</b>	<p><i>Moderator:</i> <b>Jon Stibbs</b>, Europe Technology and Energy Metals Editor, <b>Fastmarkets Panel</b></p> <p><b>From Ore to Eco-Mobility: How will Responsible Sourcing Drive the Future?</b></p> <ul style="list-style-type: none"> <li>• How can key players take a local and sustainable approach to sourcing?</li> <li>• The critical importance of developing strategic partnerships in the current landscape</li> <li>• How might regulatory updates impact sourcing from a sustainability perspective?</li> <li>• How can European players ensure responsible sourcing of secondary materials?</li> </ul> <p><b>Daphne Peres</b>, Lead Buyer Battery Raw Materials, <b>Volvo Trucks</b>  <b>Susannah McLauren</b>, Head of Responsible Sourcing and Sustainability, <b>Cobalt Institute</b>  <b>Chris Doornbos</b>, Founder &amp; Chief Executive Officer, <b>E3 Lithium</b>  <b>Rolf Kuby</b>, Director General, <b>Euromines</b></p>
<b>09:30</b>	<p><i>Moderator:</i> <b>Paul Lusty</b>, Head of Battery Raw Materials, <b>Fastmarkets Panel</b></p> <p><b>How Can South America Become Europe’s Top Sustainable Lithium Supplier?</b></p> <ul style="list-style-type: none"> <li>• How will South America adopt greener practices to outshine global competitors?</li> <li>• Can the Lithium Triangle outshine competition to become Europe’s preferred partner?</li> <li>• How will the region leverage its resources responsibly for long-term success?</li> <li>• Challenges vs opportunities in the region</li> </ul> <p><b>Jose Miguel</b>, Senior VP Corporate Services &amp; Sustainability, <b>SQM</b>  <b>Daniel Layton</b>, Chairman, <b>Ensorcia Group</b>  <b>Ignacio Celorrio</b>, Executive Vice President, Legal, Government and External Affairs, <b>Lithium Argentina Corp</b></p>
<b>10.15</b>	<p><b>Presentation</b></p> <p><b>Manganese Market Outlook: Is Manganese Entering a New Era?</b></p> <ul style="list-style-type: none"> <li>• Assessing the demand for manganese in pCAM production</li> <li>• What will China’s dominance of the market mean for Europe as 2030 approaches?</li> <li>• What price will be needed to incentivise non-China production of battery grade manganese sulphate?</li> <li>• How will this pricing take compliance into consideration?</li> <li>• How can Europe ensure high-purity refining facilities?</li> <li>• Will Europe invest in high-purity refining facilities?</li> </ul> <p><b>Robert Searle</b>, Analyst, <b>Fastmarkets</b></p>
<b>10.15</b>	<b>Networking Break</b>

## Main Stage

11:00

*Moderator: Andrew Leyland, Managing Director, SC Insights*

### Panel

#### Stuck Between a Rock and a Hard Place: How Can the Critical Raw Materials Act Compete with the Inflation Reduction Act?

- Update on the Critical Raw Materials Act
- European Critical Raw Materials Act vs IRA
- The impact of regulations on the global supply chain
- How will Europe utilise incentives and stay competitive?
- Will investment the USA and Gulf States impact planned battery capacity in Europe?
- As China gears up investment in Europe, how might regulators respond?

**Francesco Gattiglio**, Vice President External Affairs, Europe, Albemarle

**Bozorg Khanbaei**, Policy Officer, Batteries European Partnership Association (BEPA)

**Sarah Montgomery**, Chief Executive Officer & Co-founder, Infyos

**Kamila Slupek**, Sustainability Director, Eurometaux

10:40

### Presentation

#### Energy Storage Systems: Market Outlook

- Showcasing the new Fastmarkets ESS product that will be coming to market in September
- Includes a 10 year forecast on global, regional and country-based battery energy storage demand
- A look at renewable energy forecasts and how BESS will play into key locations as a result
- A deep dive into battery chemistries, ESS battery cell costs and other trends
- How lithium pricing will have implications for ESS costs over the decade
- Deep dives into the opportunities and risks for ESS markets in 12 countries

**Phoebe O'Hara**, Senior Analyst, Energy Transition, Fastmarkets

11:05

### Presentation

#### Understanding Battery Manufacturing Costs Using the Fastmarkets Battery Cost Index

- Trends in cell cost (LFP v NCM)
- What are the key cost drivers of Li-ion cells? How much of the cell cost is attributed to the CAM, AAM, separator, electrolyte, etc?
- How is cell cost affected by upstream raw material prices?
- What are the cost structures of the Tesla 4680 cell, BYD blade cell, and others?
- How does manufacturing location affect cell cost?
- What are the impacts of the USA IRA on cell cost?

11:40

*Moderator: Cormac O’Laorie, Managing Director, Electrosis*

**Panel**

**What Battery Chemistries Will Dominate the European Landscape**

- NMC vs LFP market share and growth forecast
- Innovation in Asia vs Europe
- Impact on supply and demand
- What other batteries might become more popular?
- What do European consumers want?
- Exploring the use of emerging cathode technologies

**Francisco Carranza**, Chief Executive Officer, **Basquevolt**

**Srinivas Popuri**, Managing Director, **Battery Consulting Partners**

**Christian Ruediger**, Managing Director & Founder,

**Chem4Batteries GmbH**

**Emilie Bodoin**, Chief Executive Officer & Founder, **Pure Lithium**

**Krishna Muthu PhD CEng**, Senior Analyst – Battery Manufacturing Cost Modelling, **Fastmarkets**

11:25

**Presentation**

**Lithium Metal Production: Why, How, Challenges and Recipes for Success**

- Medium- and long-term price for rare earth materials and demand forecasts
- Developments within the supply chains across Europe, USA, and China
- The critical role of dysprosium, Terbium, and Gallium

**James Anson PhD Eng**, Associate Process Engineering, Global Director Magnesium, **Hatch**

11:45

**Presentation**

**Supply Chain Insights: Are Rare Earth Materials the Key to Future Technologies**

- Medium- and long-term price for rare earth materials and demand forecasts
- Developments within the supply chains across Europe, USA, and China
- The critical role of dysprosium, Terbium, and Gallium

**Dominic Wells**, Research director, **Blue Project**

12:10

**Presentation**

**Cobalt’s Prolonged Oversupply & What it Means for Western Operations and OEMs?**

- Drivers behind the low-priced environment and how long will it persist?
- Ramifications for the development of Western projects

- What needs to change for global prices to start to recover?

**Robert Searle**, Analyst – Battery Raw Materials, **Fastmarkets**

**12:20** *Moderator: Callum Perry, Senior Price Reporter, Fastmarkets*  
**Panel**  
**Building Battery Supply Chain Ecosystems: What Lessons can be Learned from Canada?**

- Overview of current and prospective critical minerals projects in Canada
- Quebec's role in critical mineral supply chain
- The true impact on increased development in Canada on Europe
- How can Canadian manufacturers ensure they are creating batteries that are in line with EU regulations?
- What lessons can Europe learn from Canada?

**Jonathan Lafontaine**, Strategic Advisor, **Quebec's Ministry of Natural Resources**  
**Charles-Olivier Tarte**, Chief Financial Officer, **Nouveau Monde Graphite**

**13:00** *Moderator: William Adams, Head of Base Metals & Battery Research, Fastmarkets*

**Panel**  
**What's Next for DLE Technology in Europe?**

- Growth of direct lithium extraction in Europe
- DLE vs Hard Rock extraction
- Opportunities and challenges with extraction technologies
- Sustainability and greenwashing in focus
- Extraction methods in Europe vs the rest of the world

**Thibault de Saint-Vaulry**, Regional Sales Manager – Europe, **Geolith**

**12:25** *Moderator: Alex Cook, Senior Price Reporter, Fastmarkets*  
**Panel**  
**Cobalt Market Deep Dive: What Challenges Do Western Projects and Operations Face?**  
**Talking Points:**

- What are the key obstacles Western cobalt projects must overcome to ensure long-term viability?
- How do stringent environmental and regulatory standards impact the success of cobalt operations in the West?
- What strategies can Western companies adopt to secure a stable and ethical cobalt supply chain?
- How can Western producers maintain a competitive edge in a global market increasingly dominated by other regions?

**Robert Searle**, Analyst – Battery Raw Materials, **Fastmarkets**  
**Ivy Qi**, Vice President – Product Development, **LME**

**13:00** *Moderator: Jon Stibbs, Europe Technology and Energy Metals Editor, Fastmarkets*  
**Michael Insulan**, Vice President – Commercial, **Electra Battery Materials**

**Fireside Chat**  
**Valuing the Critical Mineral in the Battery Supply Chain: A Guide to Pricing Mechanisms**

- Fastmarkets pricing mechanisms to help navigate the battery raw materials markets
- Evolving pricing solutions in evolving markets
- Deep dive into cobalt, lithium, graphite spot pricing

**Solomon Cefai**, Price Reporter, **Fastmarkets**

**Dr. John Burba**, Founder & Chief Technology Officer,  
**International Battery Metals (IBAT)**  
**Samuel Moore**, Chief Executive Officer, **ILiAD**

**Alex Cook**, Senior Price Reporter, **Fastmarkets**

**13:40**      **Networking Lunch**

**13:35**      **Presentation**

#### **Graphite Market Outlook**

- Graphite export restrictions
- How can the industry address sustainability concerns around high energy intensive production?
- Balancing cost and sustainability
- Will China continue to dominate the global graphite market?
- What Does the Future Hold for European Graphite?

**Georgi Geogiev**, Battery Raw Materials Analyst, **Fastmarkets**

**14:00**      **Presentation**

#### **Nickel Market Outlook**

- Price forecast
- Supply and demand overview

**Olivier Masson**, Principal Analyst, **Fastmarkets**

**14:15**      *Moderator:* **James McKeigue**, Base Metals Editor – Europe,  
**Fastmarkets**

#### **Panel**

#### **Paving the Way to Cleaner Nickel in Europe**

- Where will European nickel come from?
- Is there a future for non-Indonesian nickel supply in Europe?
- Could nickel sulphate dominate the future market?



- How will increased use of nickel in batteries impact Europe's nickel demand?
- Overview of green nickel premiums
- What might the future look like for new but innovative high-nickel batteries?

**Olivier Masson**, Principal Analyst, **Fastmarkets**

**Mark Mistry**, Senior Manager, LCA & Sustainability, **Nickel Institute**

**Quentin Lamarche**, Co-Managing Director, **TechMet**

**14:30** *Moderator:* **Nicolo Campagnol**, Battery Insights Director, **McKinsey**

### **Panel**

#### **Is Future Demand for Manganese Being Overlooked in Europe?**

- Manganese supply and demand overview
- How will high demand for Manganese rich chemistries impact future supply?
- Where will supply to Europe come from, and at what price?
- What is Europe's role in meeting 2030 demand for high-purity manganese?
- Should investment focus on mining or refining sulphate battery grade manganese?
- Where should Europe's focus investment?

**Wim Geens**, Business Head – Lithium & Manganese, **Umicore**

**Matt James**, Chief Executive Officer, **Euromanganese**

**Rob Searle**, Analyst – Battery Raw Materials, **Fastmarkets**

## Main Stage

<b>15.10</b>	<p><i>Moderator: Phoebe O’Hara, Senior Analyst, Energy Transition</i></p> <p><b>Panel</b></p> <p><b>Battery Energy Storage Opportunities: Where in Europe will we See Most Demand?</b></p> <ul style="list-style-type: none"> <li>• Where are we seeing battery energy storage take off? Where are the biggest opportunities?</li> <li>• Where does Europe sit compared to other regions? Where in Europe is seeing most growth?</li> <li>• What barriers is the industry facing? Have debt and financing developed sufficiently to support the industry?</li> </ul> <p><b>Evelyn Fabbri, Analyst, Penso Power</b>  <b>Carmen Kompatscher, Growth Manager, Fluence</b>  <b>Jos van de Burgt, Principal Consultant Energy Storage, DNV</b></p>
<b>15.55</b>	<p><i>Moderator: Geogi Geogiev, Battery Raw Materials Analyst, Fastmarkets</i></p> <p><b>Panel</b></p> <p><b>Evolving Europe’s Anode Market: Insights &amp; Strategies</b></p> <ul style="list-style-type: none"> <li>• Unveiling the dynamics of natural and synthetic graphite</li> <li>• How can Europe stay competitive and maximise its processing capacity?</li> <li>• How are recycling rates reshaping market dynamics?</li> <li>• Where will Europe’s graphite come from, and at what cost?</li> <li>• Evaluate the performance, cost, and environmental impact of silicon and graphite</li> <li>• How will Europe navigate the material landscape with graphite and silicon?</li> <li>• Challenges and advancements in graphite anode supply chain development beyond China</li> <li>• Does China’s grip on graphite threaten IRA incentives?</li> <li>• How might European regulatory changes affect the market?</li> </ul> <p><b>Per-Inge, Group Director, Business Development &amp; Strategic Alliances, Talga</b>  <b>Terence Neu, Global Director of Strategy &amp; Corporate Development, Imerys Graphite &amp; Carbon</b></p>
<b>16.30</b>	<p><b>End of Conference</b></p>