

Interview with Anfia director

by Kallanish Power Materials

Kallanish Power Materials sits down with general director of Italian automakers' association Anfia, Gianmarco Giorda for exclusive interview with Kallanish to discuss electric mobility in Europe.

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Kallanish: Is the goal of going completely electric over the next 10 years realistic?

We are facing a complex transition, which must be managed proactively by automakers. It is equally important to adopt a synergic approach involving all stakeholders such as associations, companies, universities, governments, and social partners to implement a structured and concrete transition plan, both at an Italian and European level.

A structured transition roadmap needs substantial funds to accelerate investments for the productive conversion of carmakers and component makers and incentives for infrastructure development. The year 2026 will be a window of opportunity to talk about these issues because an assessment will be made at the European level on the progress of the work towards 2035. Authorities will evaluate the relationship between the installed charging infrastructure on European territory and electric cars on the road. What is certain is that an electric vehicle is based on a component that makes the difference: the battery.

Today, 80% of know-how, the raw materials and everything needed to build batteries is held by China. It is therefore essential to land investment projects in the battery supply chain in Italy and Europe. I am referring not only to gigafactories, but to the upstream industry, from the extraction of minerals used to make batteries to refining and chemical treatments of metals.

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Kallanish: Which technology seems more mature for green mobility: hydrogen fuel cell or electric?

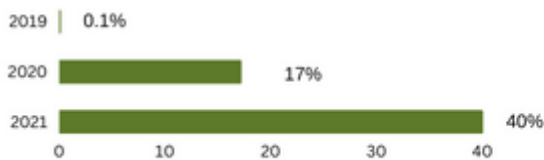
At present, electric technology is more widespread compared to hydrogen because automakers are investing massively in it. The EU has decided to focus on this technology in order to achieve the ambitious goal of reducing CO2 emissions by 100% by 2035. Let us

consider that in Italy, the production of electric and hybrid cars (BEV + PHEV + HEV), which in 2019 represented only 0.1%, rose to 17.2% in 2020, while in 2021 it exceeded 40%.

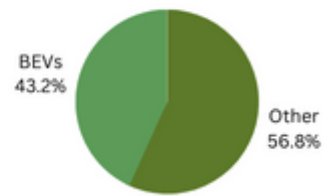
The Italian market for rechargeable cars, however, has lower numbers than other major European markets. About 113,801 units were sold in Italy in 2022, with an 8.6% market share, of which 49,169 are BEVs, holding a 3.7% market share.

At Anfia, we believe that other technologies can also effectively contribute to accelerating the decarbonisation of mobility. Among these there is hydrogen, in which the automotive sector, in particular for the transport of goods, is already investing significant resources in research and development. There are also biofuels and synthetic fuels, which have an excellent yield both from the point of view of reducing CO2 and pollution.

Production of electric and hybrid cars (BEV + PHEV + HEV) in Italy



113,801 rechargeable cars sold in Italy in 2022, an 8.6% market share



Kallanish: Can we expect government incentives for the creation of a network of hydrogen refuelling stations in Italy?

Thanks to the Italian recovery plan Piano Nazionale di Ripresa e Resilienza (PNRR), an investment of €230 million (\$249m) is currently allocated for the development of at least 40 hydrogen refuelling stations for light and heavy vehicles by 30 June, 2026. The implementation of this network will be in line with the EU Directive 2014/94 on infrastructure for alternative fuels. This is therefore a fundamental investment for a rapid diffusion of hydrogen technologies. As for the location of the refuelling stations, priority will be given to the strategic axis for heavy road transport, such as the routes most densely crossed by long-haul vehicles.

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Kallanish: How do we solve the lack of solid charging infrastructure in Italy and Europe?

The development of recharging infrastructure is one of the enabling factors for the diffusion of electric mobility, and for this reason it is necessary to accelerate the diffusion of both public and private recharging points in our country and in Europe. In Italy, in particular, we hope for administrative simplification and greater national coordination for authorisations. Approximately 12% of the infrastructure installed in Italy is non-operational due to lack of connection to the grid or due to other authorisation issues. The implementation of fast and ultra-fast charging stations above 22 kilowatts is currently at 10% in the country against 30-40% in neighbouring European nations.

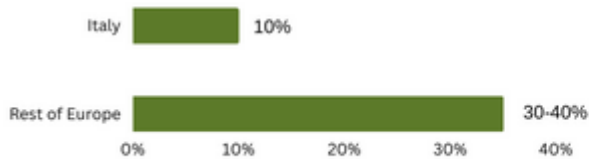


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It is also necessary to speed up the deployment of a dedicated infrastructure for private residential buildings and the implementation of tenders for the PNRR introducing national guidelines that define standard criteria in the tenders.

The implementation of fast and ultra-fast charging stations above 22 kilowatts



Approximately 12% of the infrastructure installed in Italy is non-operational

Kallanish: How do we solve the lack of a European value chain for battery recycling?

At the European level, there are many studies on the recovery and reuse of batteries. However, to date, the level of efficiency is not optimal. It goes without saying that car manufacturers are very interested in managing the recycling of batteries from a circular perspective, but for the moment it is not yet possible to create a business case to define the cost of this process. One of the main reasons is undoubtedly the small number of end-of-life traction batteries. It is important to remember that this type of battery has a "performance guarantee" of eight years or 150,000 kilometres; therefore it is easy to assume that before a few years [have passed] there will not be enough to optimize these processes.

The rapid development of the electrification sector in the coming years could take very different trajectories in terms of use of raw materials and technological efficiency. The creation of an EU battery recycling value chain has no particular impediments, but it is also necessary to take into account the current political and economic context, which is prompting all the actors involved to be cautious.

For 2023, we hope that the new government subsidies for the purchase of zero and low emission cars and electric light commercial vehicles, available since 2 January, will give a new boost to the electric market in Italy.

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