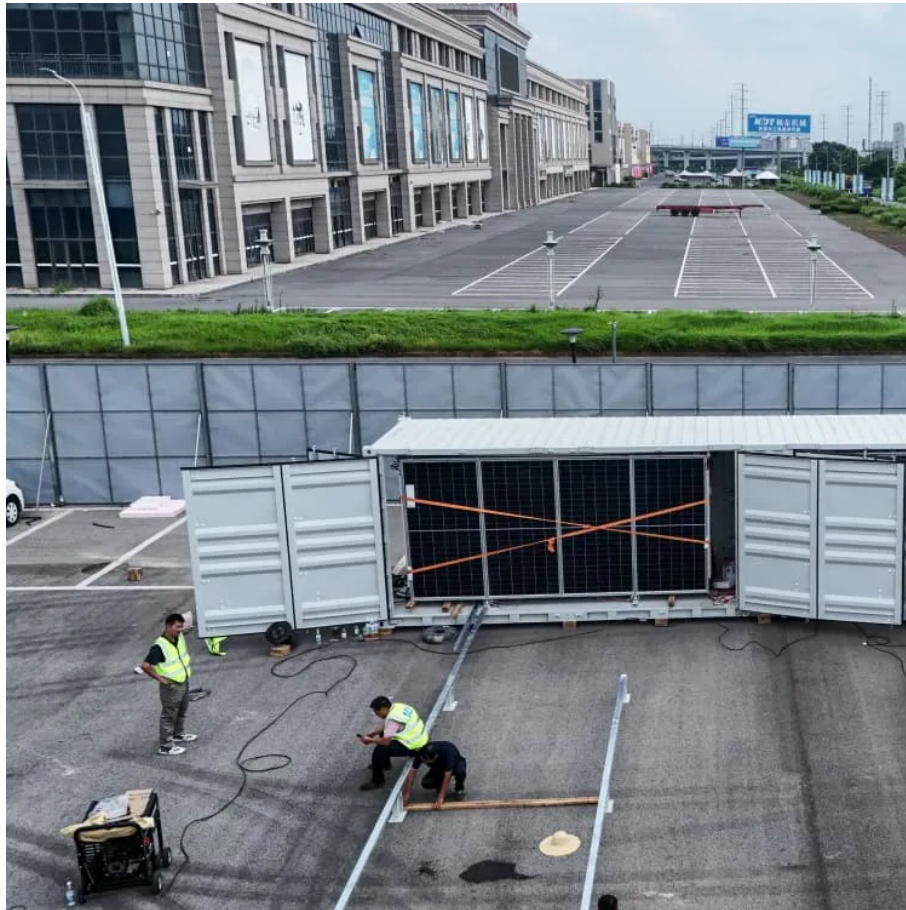


PDEOZE PowerContainer

The impact of battery cabinets on OEMs



Overview

Are OEMs sourcing and vertical integration in the battery value chain?

The sourcing strategies at Tesla, BYD and VW show that OEMs will continue to have different approaches for sourcing and vertical integration in the battery value chain. Clearly, there is no one-size-fits-all solution for this.

Why do OEMs need a vertically integrated battery supply chain?

OEMs are increasingly looking to balance the risk against the investment required to have a highly vertically integrated battery supply chain. That is the reason behind a lot of partnerships between OEMs and suppliers. This trend will gain more momentum through the end of this decade.

Do OEMs have a future for EV battery value chains?

Some adjustments in investment strategy will inevitably be required in these early days, but OEMs cannot lose sight of a future where their success will depend on the steps they take now. Key to that future is the prevailing strategy adopted around EV battery value chains. Unfortunately, there is no single solution here.

What is the future of battery supply chain outsourcing?

During the same period, outsourcing is expected to fall from about 21% to less than 11%. OEMs are increasingly looking to balance the risk against the investment required to have a highly vertically integrated battery supply chain.

What is the future of EV battery value chains?

Key to that future is the prevailing strategy adopted around EV battery value chains. Unfortunately, there is no single solution here. Much depends on the individual OEM's appetite for risk and control and the level of in-house competency and resource. There are three main components of an EV battery: cell, module and pack.

The impact of battery cabinets on OEMs

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The development of battery systems for next-generation electric vehicles (EVs) heavily relies on Original Equipment Manufacturers (OEMs).

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