



# EV BATTERY SUPPLY CHAINS

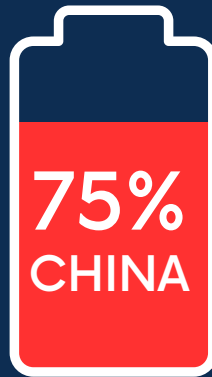
## All Roads Lead to China



### 3

### PRODUCTION

China dominates the downstream cathode and battery cell supply chain. China controls 70% of cathode material production and 75% of overall battery cell production.



CELL PRODUCTION



CATHODE MATERIAL PRODUCTION

> 50%  
CHINA



> 25%  
CHINA



> 50%  
CHINA



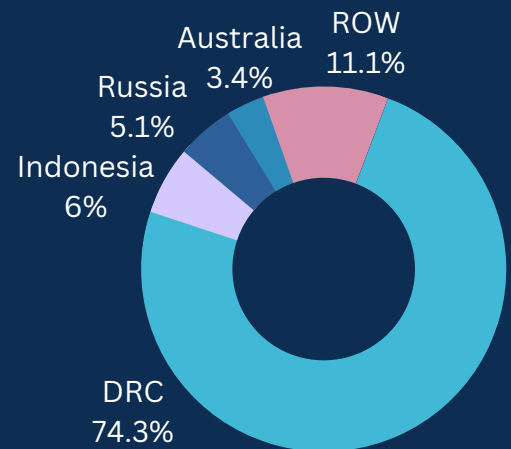
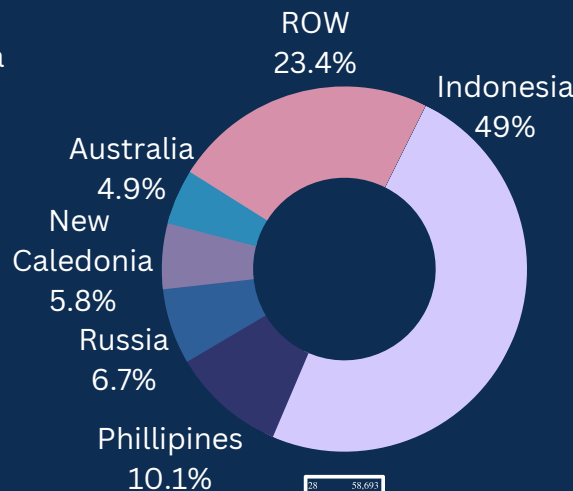
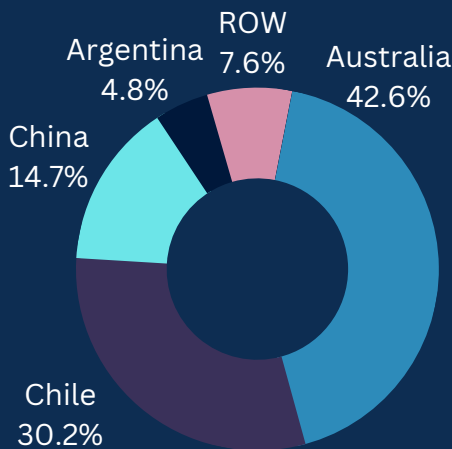
### 2 MATERIAL PROCESSING

During refinement, the supply chain bottlenecks into China, which controls over 50% of material processing.



### 1 MINING

Lithium, Nickel, and Cobalt are critical minerals that make up the cathode, the most valuable part of the battery cell. These minerals are distributed around the world, but China is investing economic and diplomatic efforts into partnerships with the largest producers of each metal. Through its Belt and Road Initiative and bilateral agreements, it is estimated that China controls or influences up to 74% of raw material mining.



\*ROW = Rest of the World

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