



**CRU**

**Data, Insight,  
Strategy &  
Communities**



# **Battery Value Chain Service**

Independent *expert* intelligence

[www.crugroup.com/battery-value-chain-service](http://www.crugroup.com/battery-value-chain-service)

# Energise your *strategy* in the battery supply chain

In the race to net zero, the battery supply chain is changing faster every day. So how do you stay ahead of it... and your competition?

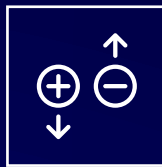
As materials demand soars, investment is accelerating in parallel. But that's just the macro picture. Understanding the intricacies and interdependencies in the battery supply chain is vital to pivoting your business to come off best in the race to transition to new forms of energy. That's what CRU's Battery Value Chain Service delivers.

By leveraging our expertise, data, independent and transparent analysis, we empower companies to navigate the ever-changing battery landscape, make informed decisions and seize emerging opportunities.

## Data and Expertise Across Key Areas



Raw Materials



Anode & Cathode Active Materials



Battery Cells



End Use



Recycling



Supply Chain Mapping and Agreements



Market Developments

Our team of world-class specialists are here to provide you with powerful insights, enabling the development of effective strategies you need to reach your goals. Unlock insights to enable decision making.

# Regional Coverage: North America



**Frank Nikolic**  
Vice President - Base and Battery Metals



The motor industry is integral to America's culture and history, but automotive manufacturers are facing a changing world.

Battery-electric mobility is shaking up long-established supply chains and vehicle design.

The US government is leading the charge to bring more of the battery supply chain home through the Inflation Reduction Act, but how far will this go and how will this industry get the materials and components it needs? How can North American battery manufacturers compete on a cost basis with China? How can the industry navigate such rapid technological change?

The battery industry is rapidly evolving, raising major questions about what the future will look like. With CRU, you'll have direct access to transparent and trusted price, supply and demand forecasts, and detailed supply chain developments. Move forward with certainty.



## Regional Coverage: Europe



**Sam Adham**  
Head of Battery Materials



European demand for electric vehicles (EVs) is rapidly rising, fuelled by evolving consumer tastes and government policies.

This surge has unsurprisingly prompted manufacturers along the entire value chain to boost operations.

However, they face stiff competition from Chinese manufacturers who hold strong technical and cost advantages and pose challenges as they rapidly expand in Europe.

We can help guide your commercial and decision making.

With direct access to analysts and consultants, acquire the data and insights you need to navigate sustainable opportunities with commercial success.



## Regional Coverage: APAC



Linda Zhang  
APAC Lead, Battery Materials



Asia remains at the forefront of the global battery industry, with China at its heart.

The country's strategic foresight enables it to dominate the battery supply chain, establishing itself as the leading hub for EVs, battery cells, and processed materials.

- Chinese manufacturers are rapidly expanding abroad, but how can they navigate trade policy obstacles in these markets?
- Other countries are ramping up their production bases in the goal to onshore manufacturing and manage supply chain risk, but to what extent, if any, does this threaten China's dominant position in the industry? Producers receive state incentives and support, but can smaller manufacturers compete against much larger incumbents, or will this lead to a wave of consolidation in the industry?
- Japan and South Korea have committed large funds for battery production and material processing, but is this enough to meet domestic demand, or will they need to continue importing supplemental supply from China?



## Raw Materials

- Overview of key raw material markets supplying the battery industry
- Price assessments and forecasts
- Implications of downstream industry developments on upstream demand (and vice versa!)
- Analysis, scenarios and exploration of potential risks affecting the demand outlook

## Anode & Cathode Active Materials

- Forecasts of cathode and anode material demand split by chemistry, end-use and region
- Access to a full database of production facilities, adjusted for risks
- Techno-economic analysis of current and next generation materials, enriched by insights from our proprietary Battery Cost Service
- Technical roadmaps of anode and cathode material producers



## Battery Cells

- Forecasts for battery demand, split by chemistry, cell format, end-use, region, manufacturer and OEM
- Access to a full database of production facilities, adjusted for risks
- Technical roadmaps of cell manufacturers and OEMs

## End Use

- Forecasts for battery demand across end-use sectors, such as automotive and energy storage
- Granular coverage of the automotive sector at multiple levels including automaker, cell maker, vehicle model, and battery levels

## Recycling

- Forecasts for end-of-life battery and material scrap pool
- Techno-economic analysis of recycling processes
- Technical roadmaps of recyclers



# Supply Chain Mapping and Agreements

- A comprehensive 'who supplies whom' database for every stage of the supply chain
- Insights into the terms of strategic supply agreements and investments

# Strategic insights: Understanding market developments

- More than just access to essential industry news – we provide you with commentary on significance and context
- Insightful analysis on major industry trends and their anticipated impact





# Service Tiers

Our service tiers are designed to meet your specific requirements, support your unique business goals and help you navigate the energy transition with ease.

Section	Content	Classic	Premium
Market developments	Market developments & commentary	✓	✓
	Executive summary	(only historic) ✓	✓
End-use battery demand	Snapshot of latest EV and battery deployment	✓	✓
	Automotive production and sales outlook		✓
	Battery demand		✓
	Battery sizes	(only historic) ✓	✓
	Topical analysis		✓
Battery cells	Battery cell production capacity	(only historic) ✓	✓
	Battery costs (high level analysis)		✓
	Tech. roadmaps of automakers and cell makers		✓
	Battery cell formats		✓
Active materials	CAM production capacity	(only historic) ✓	✓
	CAM demand		✓
	AAM demand		✓
	Tech. roadmaps of CAM/AAM producers		✓
	CAM cost index	(only historic) ✓	✓
	Battery techno-economic assessment		✓
Raw materials	Raw material supply-demand balance	(only historic) ✓	✓
	Weekly material prices and commentaries	✓	✓
	Material price outlook		✓
Supply Chain	Raw material supply-demand balance		✓



# Related Services

- [Energy Storage Technology and Costs](#)
- [Battery Technology and Cost Model](#)
- [Commodities including Battery Materials and Base Metals](#)
- [Asset Services](#)
- [Specialty Phosphate Service](#)
- [Sustainability and Emissions Service](#)

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