



**NAAT Batt 2025**  
**Ratel Consulting LLC**  
**Strategies For Innovation**

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## INTRODUCTION

- Founded in 2017 and Located in Kendall Square, Cambridge, MA
- Growth advisory built on market intelligence for the energy storage value chain
- 100+ projects delivered across the battery value chain
- Engagements in adjacent industries & with early-stage technology affords unique insights and holistic approach to growth
- Global network of technical experts in industry & academia, OEM senior management, media, & finance professionals



# INDUSTRY PRESENCE

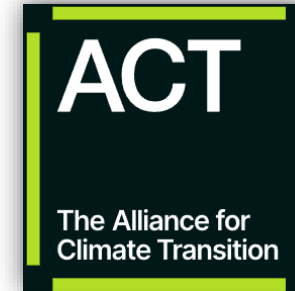
We Are Inside the Platforms and Institutions To Influence High Level Stakeholders



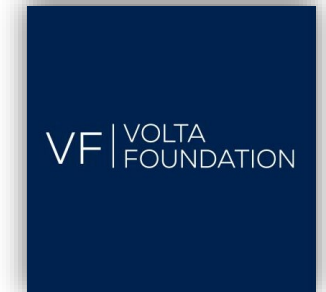
Four-time author of the most read report in the world covering the battery industry



Frequently quoted and featured in leading industry publications and presentations



Leadership in industry groups with global reach

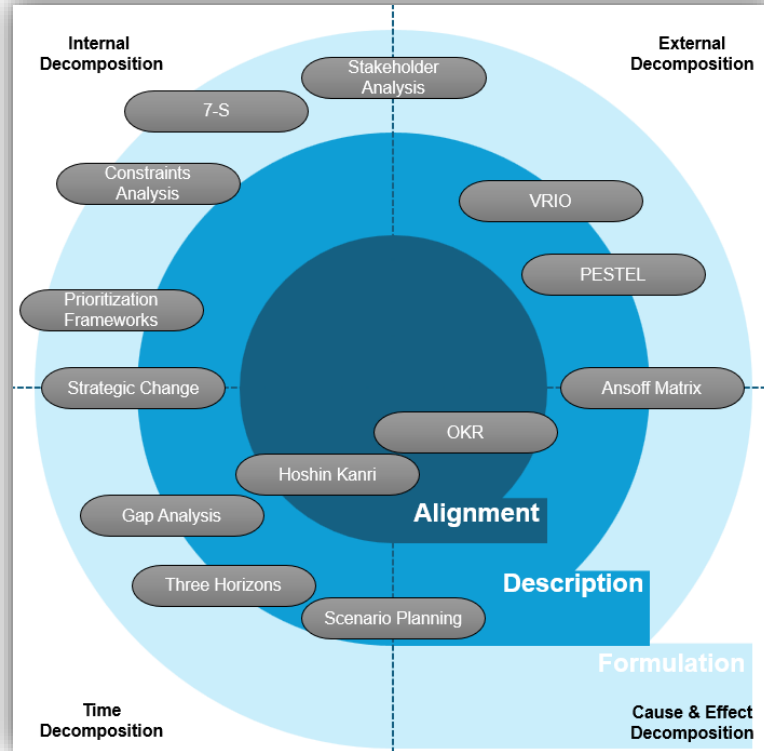


# SERVICES BY PHASE

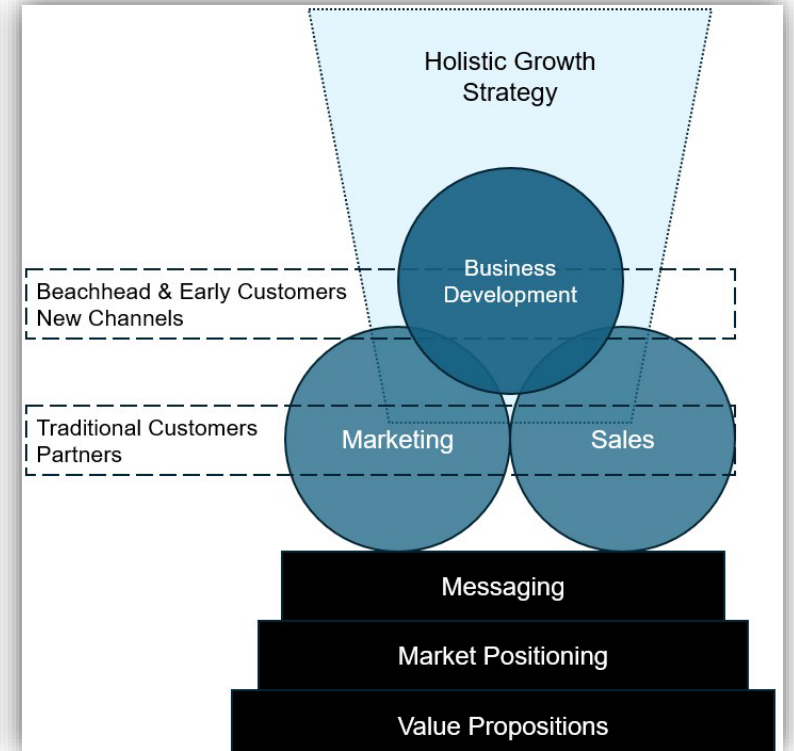
Catalyzing Growth At Every Point



Actionable Intelligence



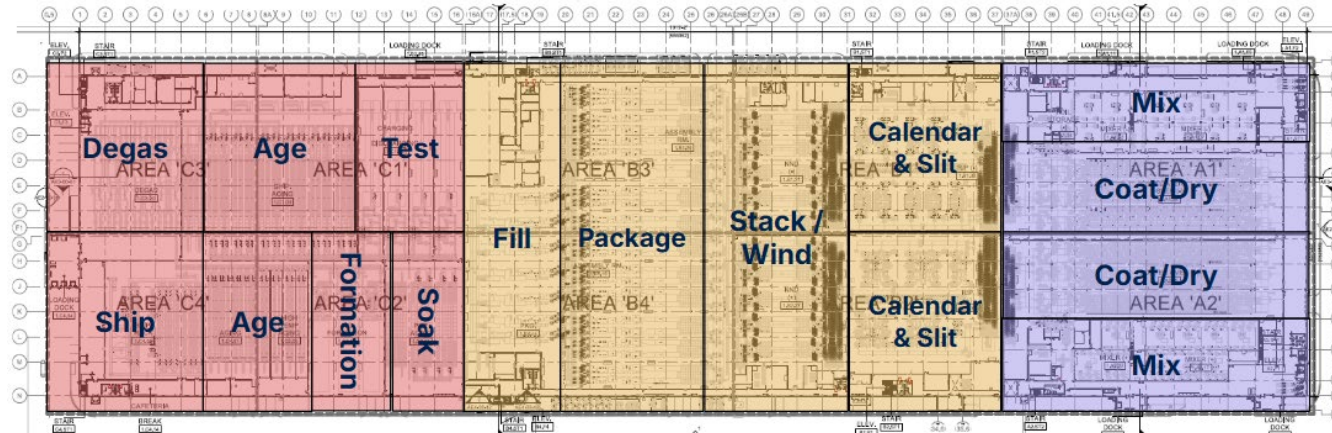
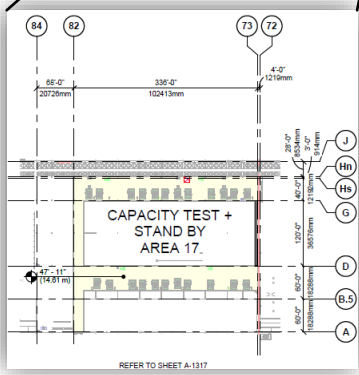
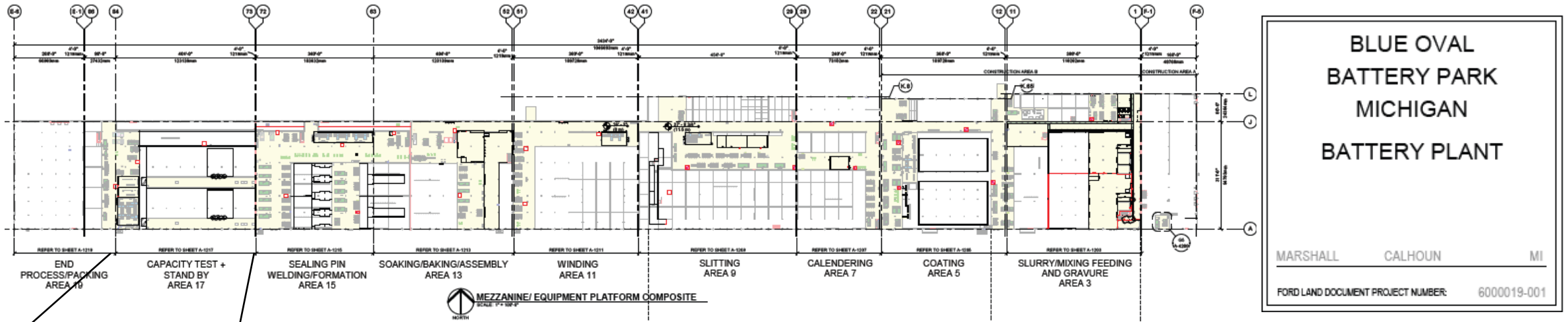
Holistic Strategy



Practicable Execution

# PROCESS ENVIRONMENT MAPPING

## Inside View of Leading-Edge Cell Manufacturing Facilities



**LG Energy Solution**  
Michigan, Inc.

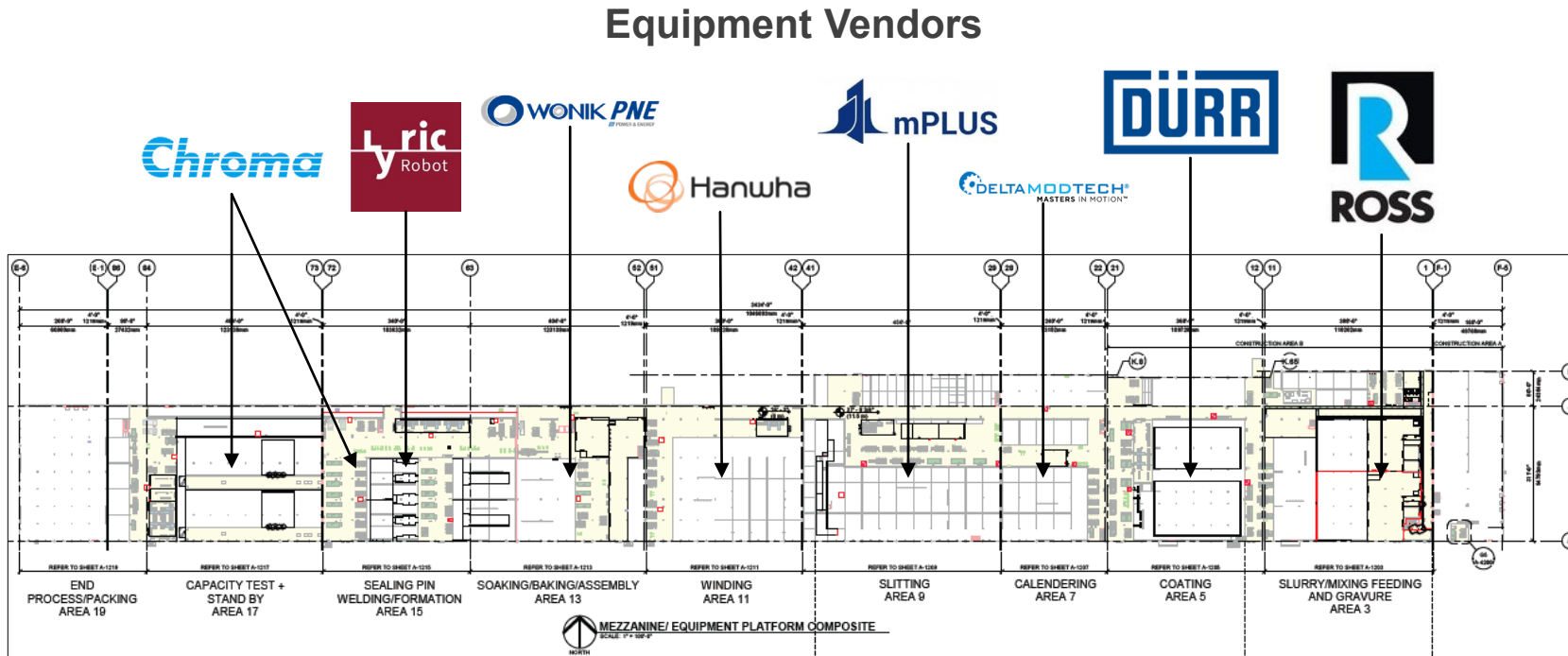
**LGES MI2 - Holland Expansion**

1 LG WAY  
HOLLAND, MI 49423

# PRODUCTION MAPPING

Visualizing Business Relationships In a Real Production Environment

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posco  
enchem  
TARGRAY  
CELGARD

VOLTAIQ

PDF/SOLUTIONS™

SIEMENS

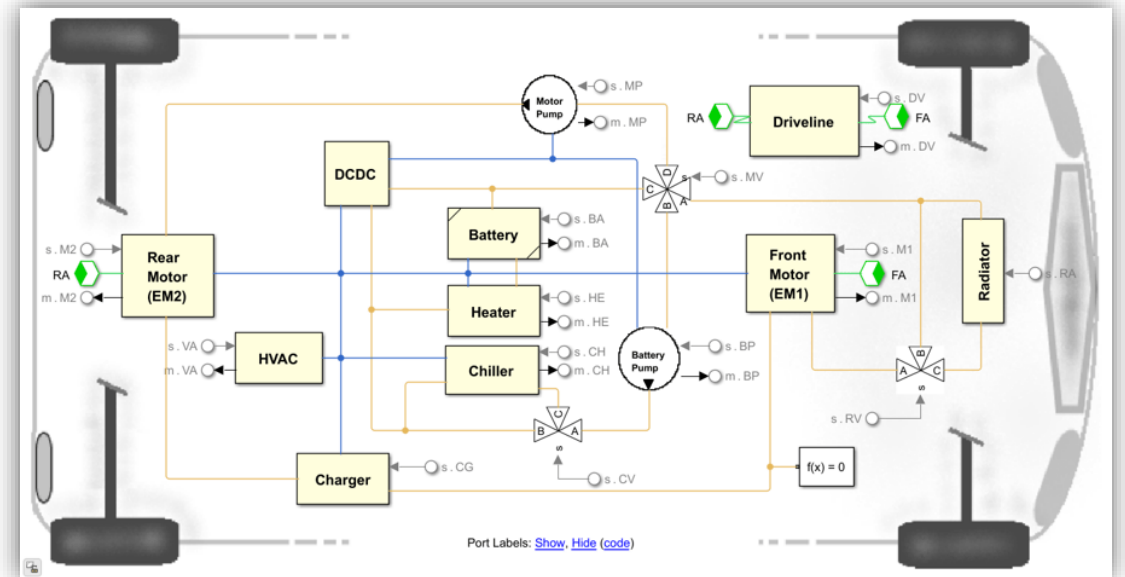
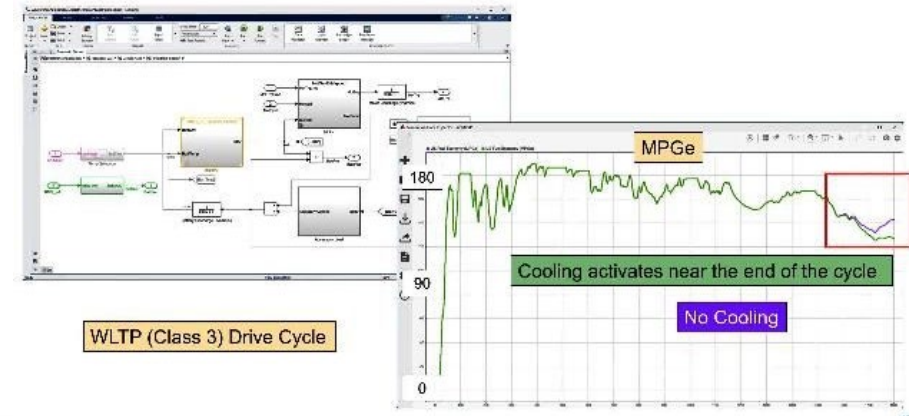


Other Vendors

# DYNAMIC APPLICATION MODELING

## Utilizing EV OEM Tools To Build a Business Case

- EV OEMs now can validate nearly any battery and powertrain technology
- EV OEMs may not be your direct customer but have enormous influence over
- Ability to calculate cost difference for equivalent range on a specific model or platform is more important than any system or performance improvement metric
- Simulation modeling using standard EV range test protocols (EPA, WLTP, WLTC, CLTC) provides the common standard for comparison



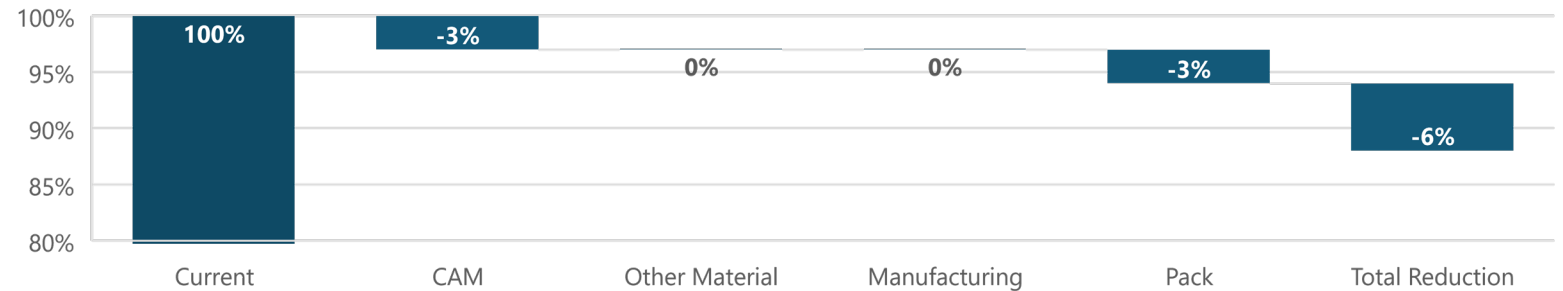


# DYNAMIC APPLICATION MODELING + TECHNO-ECON ANALYSIS

Comparative P&L Analysis for Decision Makers With P&L Responsibility

- The decision makers you need to convince understand dollars and cents above all else
- There is a need to elucidate unit level and responsibility level financial impact
- There is also a need to understand the holistic financial impact

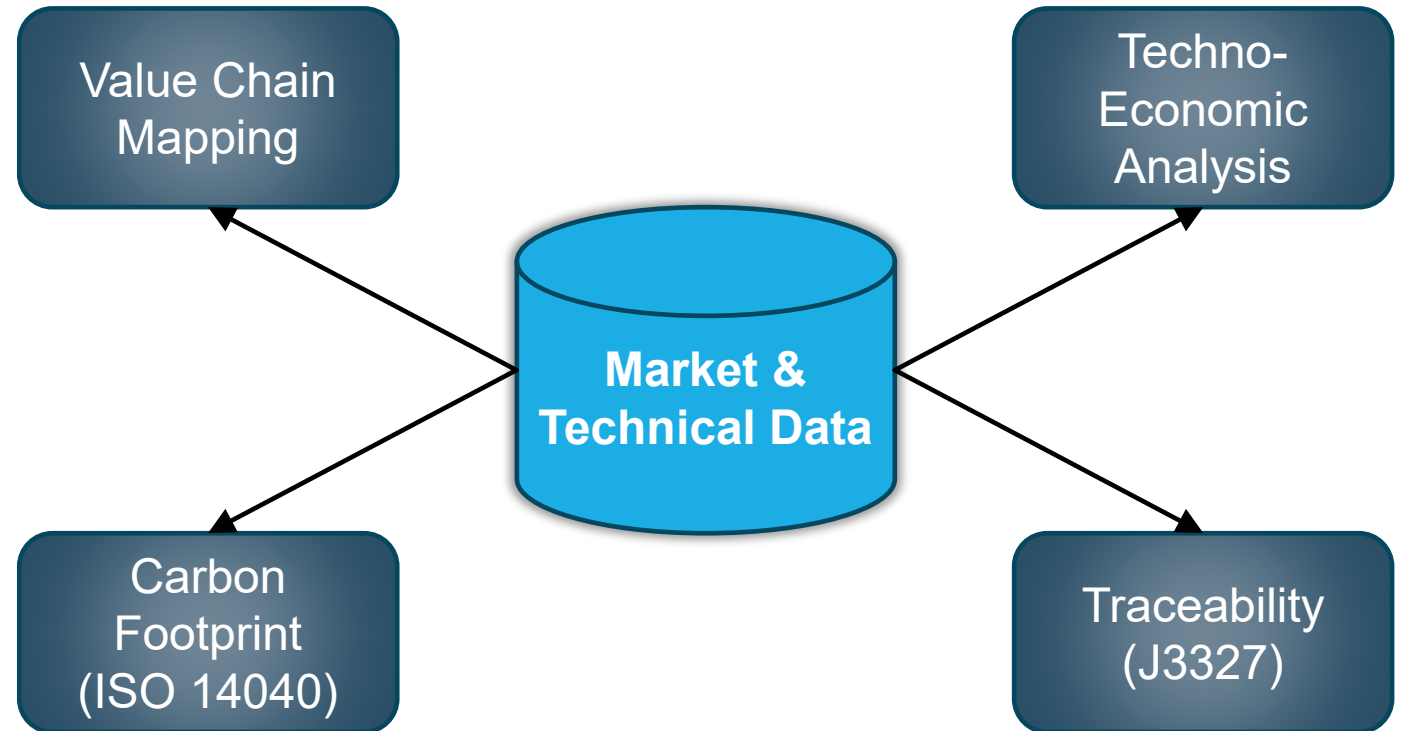
Single 50 kWh EV Pack BoM			EV Fleet Pack BoM @ 500K Units		
Cost	Current	Proposed	Cost	Current	Proposed
CAM	\$1,400	\$1,250	CAM	\$700M	\$625M
Other Material	\$1,500	\$1,500	Other Material	\$750M	\$750M
Manufacturing	\$1,000	\$1,000	Manufacturing	\$500M	\$500M
Pack	\$1,850	\$1,650	Pack	\$925M	\$825M
<b>Total</b>	<b>\$5,750</b>	<b>\$5,400</b>	<b>Total</b>	<b>\$2,875M</b>	<b>\$2,700M</b>



# SUMMARY

## Adding Value By Using the Same Data Foundation

- Traceability and ESG labeling may be a requirement for both public and private companies
- ISO 14040, SAE J3327, and other related compliance standards
- Bundling cost centers with value added services creates a more attractive option while reducing cost and complexity





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