

## **China to scrutinize Ford's EV battery deal with CATL**

Does Ford need China's EV battery technology?

In the fast-growing market for plug-in vehicles, batteries have become a key battleground -- and Ford and its rivals need China's technology. Just two Chinese companies -- Tesla supplier CATL and rival BYD -- account for more than half of the world's EV battery production.

What is Ford's new battery partnership with CATL?

This new agreement with CATL adds to Ford's existing battery capacity and available battery technology made possible through a series of key collaborations - including with SK On and LG Energy Solution (LGES).  
Sustainable EV Supply Chain

How does China's dominance affect the battery industry?

As well as Umicore, China's dominance has put pressure on western groups such as Germany's BASF, which have to contend with low-priced Chinese material, analysts said. A Umicore battery recycling plant in Belgium. The group been forced to delay plans for a battery recycling plant in Europe and a battery materials plant in Canada &#169; Umicore

Will China's cathode capacity increase despite EV slowdown?

"There was an obscene amount of capacity that came online in China in the past few years . . . It's enormous," said Hartley. Jason Ying, commodity strategist at BNP Paribas, said that despite the EV slowdown global cathode material capacity would continue to increase this decade "led by Chinese projects".

Will China consolidate the battery market?

Consolidation in the market will happen," said Evan Hartley, of data provider Benchmark Mineral Intelligence. China controls more than 80 per cent of the market in cathode active materials -- one of a battery's two electrodes -- having rapidly built out manufacturing capacity, according to S&P Global Mobility.

Does China have a cathode battery market?

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On February 13, Ford announced that CATL's technology to produce lithium iron phosphate batteries (LFP) will be licensed for use in its new electric vehicle (EV) plant in the ...

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Ford will own the new facility through a wholly owned subsidiary instead of operating it as a joint venture, which Ford has done with non-China partners.

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Ford's EV battery deal with China's CATL echoes industrial history. Mary Hui. Thu, February 16, 2023 at 7:02 PM UTC. 3 min read. ... Ford's deals with Changan Auto and CATL, ...

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Beijing is concerned the Detroit carmaker could gain access to the competitive aspects of CATL's technology, but the scrutiny is unlikely to result in the agreement being ...

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The battery giant recently infused more than \$340 million into a joint partnership between the two companies. A change from a company as influential to EVs as CATL could reshape China's ...

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