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PMI & REGIONS

Gigafactories : la « vallée de la batterie » se structure dans les Hauts-de-France

- La première région automobile mise sur l'électrique, accueillant les trois premières gigafactories de batteries en France.
- Tout l'écosystème se mobilise pour permettre la cristallisation d'une nouvelle filière de l'électromobilité.

AUTOMOBILE

Olivier Ducuing
 @DucuingOlivier
 — Correspondant à Lille

« Oui, on est en guerre économique et industrielle. On a besoin d'un écosystème et de se battre contre nos concurrents chinois qui font du dumping et qui possèdent dix ou quinze ans d'avance sur les matières premières, le raffinage, la chimie. Il faut vraiment qu'on travaille ensemble. » La requête vient de Frédéric Przybicki, vice-président industriel d'ACC, la toute première gigafactory de batteries pour véhicules électriques à s'implanter en France, à Billy-Berclau, près de Lens (Pas-de-Calais). L'entreprise associe Stellantis, Saft et Mercedes sur l'ancien site de l'usine de moteurs thermiques Française de Mécanique. Une première tranche d'investissement de 1 milliard d'euros est déjà avancée, et les premières batteries sortiront dès l'été. L'unité devrait compter 1.000 salariés en 2025.

Deux usines similaires, liées à Renault, verront ensuite le jour dans la même région des Hauts-de-France : Envision AESC à Douai en 2024 (2 milliards d'investissements) et Verkor à Dunkerque en 2025 (1,5 milliard). Soit un total de 5.500 à 7.500 emplois directs.

Si la crise de l'énergie a vivement inquiété les industriels à l'automne, ceux-ci tiennent aujourd'hui le pari de la batterie made in France. « C'est exceptionnel. Nous sommes la vallée de l'électromobilité qui se met en place en Europe. Dans dix, vingt, trente ans, on continuera à produire pour l'automobile, et on aura pris ce virage

bien avant les autres », se félicite le président de la région, le LR Xavier Bertrand, ardent défenseur de l'automobile.

La collectivité a déroulé le tapis rouge en mettant la main à la poche pour ces trois implantations majeures. Elle entend prolonger les efforts à la fois pour accueillir de nouveaux projets, à l'exemple du groupe méridional Alteo qui envisagerait une unité de fabrication d'électrolytes, mais aussi pour structurer cette filière émergente et répondre aux besoins de formation.

L'Association régionale de l'industrie automobile (Aria) a porté une démarche collective associant constructeurs, gigafactories et organismes de formation, pour monter un programme « Electro'mob ». Labellisé Compétences Métiers d'Avenir, il mobilisera un budget de 25 millions d'euros, dont plus de 14 millions d'aides. Un premier plateau technique de formation sur les batteries doit voir le jour très prochainement près d'ACC.

13.000 embauches en cinq ans

Le besoin sera vaste. « Sur cinq ans, on l'estime à 13.000 embauches, dont beaucoup de nouveaux métiers, le délai est très court », dit Luc Messien, directeur de l'Aria, qui dit y consacrer 100 % de son temps. Avec de premiers résultats : à Béthune, une école d'ingénieurs en génie électrique ouvrira ses portes en septembre. L'agglomération de Béthune-Bruay joue aussi la carte de l'innovation à travers un projet de plate-

forme de transfert de technologies sur l'éco-efficacité énergétique, Tech3E, à 6,5 millions d'euros, porté par l'université d'Artois. « Les industriels vont développer des projets avec les chercheurs de nos labos », se félicite Pasquale Mammone, président de l'Université d'Artois.

L'esprit de filière gagne clairement des professionnels sous pression pour rester compétitifs face à la concurrence asiatique. « Il est nécessaire de travailler en synergie, en partenariat en profondeur, et non pas dans une relation donneur d'ordre-fournisseur », insiste Pierre-Benoît Hamon, manager performance et écosystème chez Renault Electricity. Le constructeur opère la mutation de son usine de boîtes de vitesses de Ruitz, qui va accueillir une fabrication de bacs de batteries dans le cadre d'une coentreprise avec le chinois Minth.

Les équipementiers suivent. A l'instar de Delzen, spécialiste de l'emboutissage de pièces en métal (80 salariés et 17 millions d'euros de vente), qui vient de créer à Douvrin Delviatek, une coentreprise avec Elvia, fabricant de circuits imprimés, pour produire des têtes de batteries. Un investissement de 10 millions, qui permettra de produire des millions de pièces. L'entreprise a signé un contrat de sept ans avec ACC, mais vise aussi les autres gigafactories.

« Pour ne pas être envahi par des modèles asiatiques, il faut qu'on arrive à être beaucoup plus forts sur l'innovation, l'électricité, l'électronique. Il faut qu'on soit capable de maîtriser toute la chaîne de valeur. Il n'y a que



comme ça qu'on y arrivera », lance Rodolphe Delaunay, président de l'Aria. Pour Xavier Bertrand, il faudrait aussi un soutien plus fort de l'Etat. « On serait bien avisé, au moment où les Américains et les Chinois mettent en place des mesures de protection, d'instituer un bonus pour les voitures produites en Europe. J'assume un lobbying politique sur ce sujet. » Le président de région se dit aussi très vigilant sur l'avenir des concessions automobiles, que les constructeurs ne devraient pas selon lui négliger, au risque d'une prise de contrôle chinoise et d'un déferlement commercial. ■

« Nous sommes la vallée de l'électromobilité qui se met en place en Europe. Dans dix, vingt, trente ans, on continuera à produire pour l'automobile, et on aura pris ce virage bien avant les autres. »

XAVIER BERTRAND
Président des Hauts-de-France

Les professionnels sont sous pression pour rester compétitifs face à la concurrence asiatique.



Matthieu Boute/Photo FQR - La Voix du Nord - MaxPPP

ACC, la toute première gigafactory de batteries pour véhicules électriques à s'implanter en France, sortira ses premiers appareils à l'été.



ELECTRIC VEHICLES



GABE STERN – THE ASSOCIATED PRESS

Nevada Gov. Joe Lombardo speaks at Redwood Materials' facility in McCarran, Nev., on Thursday after it was announced the battery company has received a \$2 billion federal loan.

Battery recycler to receive \$2B energy loan from feds

Redwood Materials, created by ex-Tesla co-founder, begins copper foils production

By Tom Randall and Ari Natter
Bloomberg

America's battery supply chain is getting a jump start.

Redwood Materials, created by Tesla co-founder J.B. Straubel, said Thursday that it received a \$2 billion loan commitment from the Biden administration to build enough critical battery components to produce a million electric vehicles a year.

The loan is the fourth commitment in six months from the Department of Energy's Advanced Technology Vehicle Manufacturing loan program — the same fund that helped Tesla develop its flagship Model S electric sedan in 2010. Biden resuscitated the program in July after a 12-year hiatus, and Democrats nearly quadrupled its lending authority to \$55 billion with the climate law passed in August.

It's a big day for Redwood, which also announced it has begun production of a key product: Thin copper foil used for battery anode. Redwood now operates the first major production line for the delicate foils in the U.S., Straubel said. Redwood will expand into complex cathode materials later

this year.

"This is a super exciting moment," Straubel said. "It is the very tangible beginning of a U.S. supply chain for battery materials and we'll be ramping that up for quite a long time to come."

Secretary of Energy Jennifer Granholm was scheduled to visit Redwood's Sparks, Nevada, manufacturing facility Thursday to announce the loan, her first stop following Biden's state of the union speech that touted the administration's investments in clean energy.

Building a U.S. battery belt

Every EV battery has two electrodes — a cathode and an anode — between which trillions of charged lithium atoms travel. The cathode is the biggest factor in a battery's performance, cost and environmental footprint and the material today is produced almost entirely in Asia. Redwood plans to make cathode precursor, a preliminary solution of refined metals, later this year, and finished cathode material beginning in 2024.

Redwood's initial anode production will go to Panasonic's Nevada battery factory and the first customer for its future cathode

materials will be a new battery plant that Panasonic is building in Kansas City, Kansas.

Straubel left Tesla in 2019 in order to address the gap between demand for electric vehicles and the availability of materials needed to make them. Redwood quickly became the biggest lithium-ion battery recycler in the U.S. before branching out into anode and cathode production in Nevada. The new loan will help create 3,400 construction jobs and 1,600 full-time employees, with hiring already underway, according to Straubel.

The Nevada hub is quickly being followed by a second plant Redwood is building in Charleston, South Carolina, which was announced in December. The \$3.5 billion South Carolina facility will supply America's rapidly expanding battery belt, which stretches roughly from Michigan to Georgia. Thursday's loan announcement is to fund production in Nevada only.

Across its facilities, Redwood plans to produce enough materials for a million EVs a year by roughly 2025 and 5 million EVs a year by 2030, Straubel said.



Battery Giant LG Chem Prepares to Lock In Mineral Supplies

LG Chem Ltd. is prioritizing efforts to secure raw materials used in electric-vehicle batteries and establishing a self-sufficient global supply chain, including via potential partnerships and investments in mining companies.

(Bloomberg) -- LG Chem Ltd. is prioritizing efforts to secure raw materials used in electric-vehicle batteries and establishing a self-sufficient global supply chain, including via potential partnerships and investments in mining companies. "We are preparing ourselves first of all to secure supply of raw material, which is more important than the price," LG Chem Chief Executive Officer Shin Hak-cheol said in an interview with Bloomberg Television in Seoul. "Our first and foremost priority is to secure enough raw material for the future." LG Chem makes cathode-active materials, a key ingredient for EV batteries. It is the parent of LG Energy Solution, the world's second-largest battery cell maker and supplier for automakers including Tesla Inc., General Motors Co., Ford Motor Co. and Stellantis NV. The South Korean company is doing "a lot of projects" to ensure it has a stable source of supply, according to Shin. "I don't think we'll ever be a mining company. However, if there's a project that makes sense, maybe we can invest." The fragility of the EV industry's supply chain has been exacerbated by disruptions caused by major global events such as the Covid pandemic and Russia's war in Ukraine, driving up the cost of raw materials including metals like lithium, nickel, cobalt and manganese, which are used in batteries. While the price of lithium has weakened 13% this year, the material is still trading at sky-high levels after climbing 87% last year and almost 430% in 2021. Lithium Trading Hits Record in Chicago Amid Battery Metals Boom Asked about the US Inflation Reduction Act, which aims to reduce the EV industry's reliance on supplies from China, Shin said more clarity on policies was needed and that the industry expects further details to emerge before the end of March. "Different elements and components need clarification," he said, echoing comments he made in an interview with Bloomberg News in December. "You're talking about a pretty complicated puzzle." The law requires companies to source battery minerals from countries that have free-trade agreements with the US to be eligible for \$7,500 tax credits on EV purchases. Automakers have pushed back against the plan, arguing for leeway given the time it will take to secure materials. Many mines are located in emerging markets that don't have FTAs with the US. "I'm not sure even the US government has all the answers to satisfy everyone in the supply chain," said Shin, adding that the IRA situation in the US is probably getting a disproportionate share of attention. "Any country's policy will change, it will not be the same," Shin said. "LG Chem will be here for 50 years, 100 years, many, many hundreds of years more, so I'm not really basing my supply-chain strategy on one country's policy, which is transient by definition" "Long before IRA, we have been pursuing a global supply-chain strategy," he said. "Our strategy is to be relatively self-sufficient in three mega regions of the world, and the US is just one of them." GM and LG Energy last month shelved plans to build a fourth plant in the US, though talks are ongoing and no final decision has been made, Bloomberg reported previously. Shin held a joint press conference with US Treasury Secretary Janet Yellen during her visit to Seoul in July to stress the importance of "friend-shoring" in trade relationships. "She wanted to learn about the battery industry in Korea and what are the implications of metals and how they're made, where they're coming from," he said. "I asked about the US economy." LG Chem's shares have risen about 12% this year, despite a blip earlier in February when the company's fourth-quarter results missed analysts' estimates, with its petrochemicals operations posting an operating loss of 166 billion won (\$131 million). Shin said the traditional business was "going through the bottom of the downcycle." "We can only think about going up from here," he said. Still, the shares have gained 54% from a low in March last year. LG Chem is also facing competition from established producers aggressively expanding capacity. The company aims to reduce its carbon content and move toward higher value applications through investing in sustainable materials such as biodegradable plastics, Shin said.--With assistance from Adrian Wong and Andy Hung. (Adds more on share price performance in penultimate paragraph.) ©2023 Bloomberg L.P.

Heejin Kim, Heesu Lee and Stephen Engle



Trafigura's Nickel Nemesis Was Already Notorious in Metal Circles

One of the world's biggest commodity traders faces more than half a billion dollars in losses from what it described as a 'systematic fraud' involving missing nickel.

(Bloomberg) -- When news broke that Trafigura Group faces more than half a billion dollars in losses from what it described as a “systematic fraud,” the biggest surprise for many market insiders wasn’t the commodity trader’s missing nickel cargoes. It was that one of the industry’s largest players was still doing business with a man that others had long since backed away from. Indian businessman Prateek Gupta and his companies, against whom Trafigura secured a \$625 million freezing order this week, have a checkered history in the trading world. Trafigura Faces \$577 Million Loss After Finding Nickel Fraud Merchant Gunvor Group and trade finance fund TransAsia Private Capital Ltd. lost money in earlier dealings with Gupta’s companies, public filings show. Others, including banks and counterparties, became uncomfortable at times with the group’s trading activities, according to several people who either worked at the group or did business with it. Last year, India’s federal police announced it’s investigating allegations of fraud against Gupta himself. Ian Milne, a former commodity trade finance executive at Rabobank and HSBC Holdings Plc who worked at TransAsia for two years in 2018 to 2020 trying to recover debts from Gupta’s companies, said he “had to rub my eyes a couple of times” when he saw the news this week. “It’s very well known in the market that these guys have a highly dubious reputation,” Milne said in an interview. “Most people haven’t dealt with them for many years.” Why Metals Keep Going Missing in Commodity Trading: QuickTake Trafigura’s losses have shocked the commodity trading world, demonstrating that even one of the largest companies isn’t able to avoid the kind of blowups and risks that have plagued the industry in recent years, and raising questions about the whole sector’s risk management. Bloomberg made multiple attempts by phone and email to reach Gupta and companies owned by, or otherwise linked to him for comment on Friday but did not receive any response. Trafigura said that it began investigating after identifying a number of red flags. “This was a systematic fraud perpetrated after a long and legitimate business relationship dating back to 2015 that involved misrepresentation and widespread falsification of primary and supporting documentation,” a spokeswoman said. “Any fraud is an opportunity to review and tighten systems and procedures and a thorough review is underway.” Trafigura Tells Its Banks They Aren’t Exposed to Nickel Fraud Gupta was born in 1979 into a commodity trading family. His father Vijay was a steel trader who represented Brazilian and Spanish companies importing iron and steel products into India in the 1980s and 1990s, according to a company obituary. When he died in 2009, Prateek took over the running of the family company, Mumbai-based Ushdev International Ltd., with his mother Suman as chair. At its peak in the early 2010s, the company had a market capitalization of about \$250 million. In person, Gupta is charming and rarely flustered, say several people who’ve done business with him. “He has a very laid-back style. Whatever the problem is, he’ll say it’s not really a problem, it’s all going to be solved,” said Milne, who now works for MonetaGo, which builds technology to help banks and others avoid trade-finance frauds. Over the years, Ushdev branched out into developing wind power assets, but it still focused on metal trading. Gupta added entities in Singapore, Malaysia, Dubai, the UK and Switzerland, including TMT Metals and companies under the banner of UD Trading Group. In a 2011 interview published by IndiaInfoline.com, he described his business as India’s third-largest metal trading company and said it had been doubling in size over the previous years. “The metal business is back to back business,” he said. “We don’t face any kind of downside.” For some in the industry, the Gupta companies’ trading activity raised question marks, said the people familiar with the matter. The companies would sometimes buy and sell large volumes of metal for little apparent commercial purpose, some of the people said. ‘Carousel Fraud’ Jonas Rey, chief executive officer of Athena Intelligence, a corporate intelligence company in Geneva that provides support to trade finance entities, said he investigated entities including TMT on behalf of several clients. “We provided intel to multiple clients on TMT’s involvement in what we called a carousel fraud,” he said. “You have one cargo in the middle, you create 10 companies around it, and they sell the cargo to one another. One cargo gets financed 10 times. It’s like a financial musical chair. Eventually everything comes crashing down.” Several companies came to regret their dealings with Gupta. Gunvor was left with exposure to Ushdev in the tens of millions of dollars when it got into



financial trouble, according to company filings and people familiar with the matter. The exposure only led to a relatively small loss for Gunvor as it claimed on its insurance. Still, it was a blow that coincided with Gunvor's decision to close its metal-trading desk in 2016. A list of creditors published when Ushdev went into insolvency in 2018 showed that Gunvor was its largest non-bank creditor with an exposure of 3 billion rupees (about \$45 million at the time). A Gunvor spokesman declined to comment. TransAsia is still embroiled in legal disputes with Gupta companies over alleged unpaid debts linked to its financing of trade in metals including copper. In one instance that's been made public in Singapore courts, the trade finance fund claims that Gupta's UD Trading Group Holding owes it \$63 million. UD Trading has in the past said it doesn't believe it's liable for the debt. Last July, the Central Bureau of Investigation – India's equivalent of the FBI – said it had opened an investigation into Prateek and Suman Gupta, as well as Ushdev, over alleged fraud after a complaint made by State Bank of India. The CBI said in a press release it had conducted searches in three locations which had led to the "recovery of incriminating documents/articles." For Trafigura, the saga will raise difficult questions over how it vets its business partners. "The postmortem will probably be ruthless internally," said Jean-Francois Lambert, a consultant and former trade finance banker. "Traders and risk management will be challenged." --With assistance from Alfred Cang, Swansy Afonso, Shruti Srivastava, Joe Deaux and Mark Burton. ©2023 Bloomberg L.P.

Jack Farchy and Archie Hunter



10/02/2023 03:30:54 GMT

En Hongrie, rébellion contre une méga-usine chinoise de batteries

Dans l'est de la Hongrie, les ouvriers sont à pied d'oeuvre pour bâtir la plus importante usine de batteries électriques d'Europe. Au grand dam des habitants qui se mobilisent pour faire capoter ce projet chinois et les ambitions de Viktor Orban.

Des réunions publiques houleuses, des manifestations qui se succèdent: Debrecen, deuxième ville du pays d'Europe centrale, s'inquiète de voir pousser une énième fabrique sur son sol, pointant son impact environnemental.

Le Premier ministre nationaliste, qui courtise depuis des années avec succès les acteurs automobiles grâce à des ristournes fiscales et aux salaires maintenus très bas, n'est pas habitué à pareille résistance.

Les marques de luxe allemandes Audi et Mercedes y ont déjà élu domicile et reconvertissent actuellement leurs lignes d'assemblage à l'électrique. Leur compatriote BMW s'y installe aussi avec un investissement de deux milliards d'euros.

- Risques de pollution -

Le terrain est idéal pour le géant chinois de la production de batteries CATL qui a annoncé en août 2022 un projet surprise de 7,3 milliards d'euros, aux portes de Debrecen.

Cette méga-usine, qui doit sortir de terre d'ici trois ans, a de quoi impressionner: avec une capacité annuelle de 100 gigawattheures (GWh), elle pourra fournir des batteries lithium-ion pour un à deux millions de voitures électriques par an, loin devant les autres sites européens.

Problème: le mastodonte est très gourmand en énergie et en eau, dénoncent les militants écologistes. Ils redoutent aussi des déversements de substances toxiques dans le sol et les nappes phréatiques.

Contacté par l'AFP, le groupe CATL s'est dit "ouvert aux questions et commentaires de la communauté locale", assurant de ses efforts pour "le développement durable" de Debrecen.

La municipalité n'avait pas répondu dans l'immédiat.

Samedi dernier, plusieurs centaines de personnes se sont encore réunies dans ce bastion de M. Orban pour réclamer un arrêt des travaux.

"Les gens n'ont pas été correctement informés du projet, on ne leur a pas demandé leur avis", s'insurge Gabor Bogos, un ingénieur informatique de 42 ans.



"Nous avons besoin d'eau propre, d'air pur, pas de batteries", lance Julia Perge, 56 ans, co-organisatrice de la manifestation.

Les craintes environnementales ont été avivées par la sécheresse de l'été 2022, qui a tari un lac voisin dans cette vaste zone de plaines agricoles particulièrement chaude en été.

Le gouvernement, regrettant "la propagation de fausses nouvelles", a mis en avant jeudi des "normes très strictes".

- Pénurie de main-d'oeuvre -

Devenir l'usine de l'Europe... d'autres dossiers suscitent la contestation en Hongrie sans toutefois menacer les plans de Viktor Orban, notamment l'extension d'un site du sud-coréen Samsung à God, au nord de Budapest.

Au total, plus de 20 projets sont dans les tuyaux, un des symboles des "Orbanomics", une stratégie mise en place après le retour au pouvoir du dirigeant en 2010.

Objectif à horizon 2030: faire de la Hongrie le deuxième fabricant de batteries de véhicules électriques de l'UE derrière l'Allemagne, alors que la production est aujourd'hui dominée par l'Asie.

Le ministre des Affaires étrangères Peter Szijjarto se targue d'avoir su attirer les investissements malgré "une énorme concurrence", grâce à la politique d'ouverture à l'Est de Budapest et son rapprochement avec Pékin.

"C'est LE secteur industriel d'avenir", porteur d'espoir en période de morosité économique et d'inflation galopante, plaide le responsable, à l'unisson pour une fois avec Bruxelles. La Commission veut porter la part de marché européenne à 25% à la fin de la décennie, contre 3% en 2020.

Mais encore faut-il trouver les bras pour faire tourner l'usine, réagit-on à Debrecen, où l'on s'inquiète de voir affluer des travailleurs venus d'Asie pour occuper les 9.000 postes - faute de main-d'oeuvre locale suffisante. La Hongrie en plein emploi manque cruellement d'ouvriers.

"On nous promet que la construction de sites industriels permettra de convaincre la jeunesse de rester" dans un pays marqué par la fuite des cerveaux, "mais c'est faux", déplore Dora Gyorffy, professeure à l'université d'économie de Corvinus à Budapest.

"C'est juste un désastre environnemental", assène l'experte.

pmu/anb/bg/lpa

Batteries électriques : virage stratégique pour le Critt M2A

Le centre de recherche et développement du Pas-de-Calais investit pour tester les batteries électriques, consacrant l'abandon de ses activités thermiques au profit de l'électrique.

[Pas-de-Calais](#)

[Hauts-de-France](#)



Le CRITT M2A sera chargé de tester la conformité des cellules et des modules produits. (DR)

Le centre de recherche et développement du Pas-de-Calais, baptisé « Critt M2A » parachève sa bascule vers le tout-électrique. Très orienté vers l'automobile et basé à Bruay-la-Buissière, dans le Pas-de-Calais, il annonce un investissement de 9 millions d'euros dans les six prochains mois pour se doter d'un très grand centre de test. Ce nouveau département dévolu aux [batteries électriques](#) comprendra, à terme, six bancs d'essais et signera, du même coup, la fin de ses activités thermiques.

Il va démarrer avec un gros contrat signé avec ACC, la première gigafactory à ouvrir, à quelques kilomètres de là. Le centre sera chargé de tester la conformité des cellules et des modules produits, à partir d'octobre 2023 pour les premiers essais puis à pleine cadence à partir de 2024. Ce seul contrat, prévu sur sept ans, devrait peser à lui seul 20 % des activités du centre.

Ouverture du capital

La plateforme achève ainsi un virage stratégique, après avoir travaillé durant de nombreuses années sur les essais moteurs (thermiques) et sur l'acoustique, avec quelque 200 clients dont les principaux constructeurs et équipementiers mondiaux.



Le choix de l'Union européenne de faire une croix sur le moteur thermique en 2035 puis l'arrêt brutal des projets des industriels automobiles pendant la crise sanitaire ont poussé [le Critt M2A à accélérer sa propre transition](#). « Pendant deux ans, la demande a été complètement à l'arrêt. Maintenant, les clients libèrent à nouveau leurs moyens financiers », confirme Jérôme Bodelle, directeur du centre.

En perspective, l'arrivée des deux autres gigafactories apportera un surplus d'activité et donc exigera de nouveaux investissements. Son directeur reconnaît que la marche sera sans doute un peu haute et qu'une ouverture du capital sera sans doute nécessaire. Le site emploie 49 salariés pour un chiffre d'affaires de 6,5 millions d'euros.

Ford Plans to Build EV Battery Plant in Michigan With Chinese Partner

Ford Motor Co. and Contemporary Amperex Technology Co. Ltd. plan to build a battery plant in Michigan, according to people familiar with the matter, capping a monthslong search that became mired in geopolitical tensions between the US and China.

(Bloomberg) -- Ford Motor Co. and Contemporary Amperex Technology Co. Ltd. plan to build a battery plant in Michigan, according to people familiar with the matter, capping a monthslong search that became mired in geopolitical tensions between the US and China. The multibillion-dollar facility, to be located about 100 miles west of Detroit, is expected to create about 2,500 jobs, said the people, who asked not to be identified because the plans aren't yet public. The agreement could be announced as soon as next week, they said. Ford is moving ahead with the project despite uncertainty around how the US Treasury Department will interpret requirements in President Joe Biden's signature climate package, the Inflation Reduction Act. The law is designed to withhold consumer tax credits for EVs made with a certain amount of China-linked materials in their batteries. "We've said that we're exploring batteries based on CATL's technology for Ford vehicles and that we plan to localize" production in North America, Ford said in an emailed statement. The company didn't specify whether it had picked a location or determined other details of the project's scope. CATL didn't immediately respond to an emailed request for comment outside business hours in China. Ford shares fell 5.6% in New York Friday to close at \$12.73. They are up 9.5% this year. The US carmaker and China's CATL, the world's biggest maker of batteries for electric vehicles, have been weighing a novel ownership structure under which Ford would own 100% of the plant, including the building and the infrastructure, Bloomberg reported last year. Ford workers would build the batteries, while CATL owns the technology to create the cells, according to the people familiar. Such an arrangement may allow the facility to qualify for lucrative production tax credits under the Inflation Reduction Act while requiring no direct financial investment from CATL. The site for the new factory, near the small town of Marshall in southwestern Michigan, has room to grow, potentially bringing more jobs and a larger investment, according to the people familiar. **Read More: The Breakneck Rise of China's Colossus of Electric-Car Batteries** The companies also considered Virginia as a possible home for the plant, Bloomberg has previously reported. That option was nixed when Virginia Governor Glenn Youngkin, a potential Republican contender for the White House in 2024, yanked his state out of the competition, calling CATL a "Trojan horse" for China that would undermine policy efforts to strengthen the US auto industry. Macaulay Porter, press secretary for Youngkin, declined to comment Friday. Michigan Governor Gretchen Whitmer has staked out a different position from her counterpart, calling Youngkin's move "a political determination," the Detroit News reported last month. Whitmer has been fighting to attract more EV battery investment after losing out to Tennessee and Kentucky on Ford's historic \$11.4 billion Blue Oval City investment in 2021. **Read more: Ford Jobs Cost \$414,000 Apiece as Factory Fight Takes Off** Ford announced in July it will begin using less expensive lithium iron phosphate battery packs from CATL on its Mustang Mach-E models this year and F-150 Lightning pickups in early 2024, which will boost output of those popular vehicles. Ford has said it has a plan to source 40 gigawatt hours of those batteries annually in North America in 2026, but would initially import them from China. Ford is investing \$50 billion broadly to develop and build electric vehicles and plans to produce 2 million a year by the end of 2026. The Dearborn, Michigan-based automaker was the No. 2 seller of EVs in the US last year, well behind Tesla Inc., which controls almost two-thirds of the American market. --With assistance from Craig Torres. (Updates with more information about plant in seventh paragraph.) ©2023 Bloomberg L.P.

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