

# **Middle East Flow Battery Supply Chain**





## Overview

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Does China have an oversupply of l(m)fp batteries?

China, which began to favor L (M)FP chemistries before other regions did, now has a significant oversupply, while other regions have a large undersupply and require L (M)FP battery imports. These trends are expected to continue through 2030 (Exhibit 5). For NMC and NCA batteries, all regions are expected to have an oversupply in 2030.

Does battery supply exceed global demand?

Although battery supply may exceed demand at the global level, the picture is more nuanced and varied by region. Some countries have excess capacity—meaning more than enough to satisfy local demand—while others rely on imports to alleviate local shortages. This regional view could become critical if more countries try to localize production.

What are the three global demand scenarios for batteries?

We created three global demand scenarios for batteries: fading momentum, continuation of the current trajectory (base case), and further acceleration. The main demand differentiators included variations in EV production volume and uptake of energy storage systems.

Where are batteries made in the world?

Globally, the top two battery suppliers are Chinese. They conduct almost all production within China, but many of their customers, including major OEMs, are headquartered elsewhere. About 64 percent of Chinese battery capacity in 2030 will involve L (M)FP-type chemistries.



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