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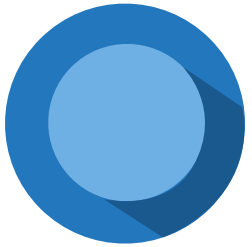
GanfengLithium

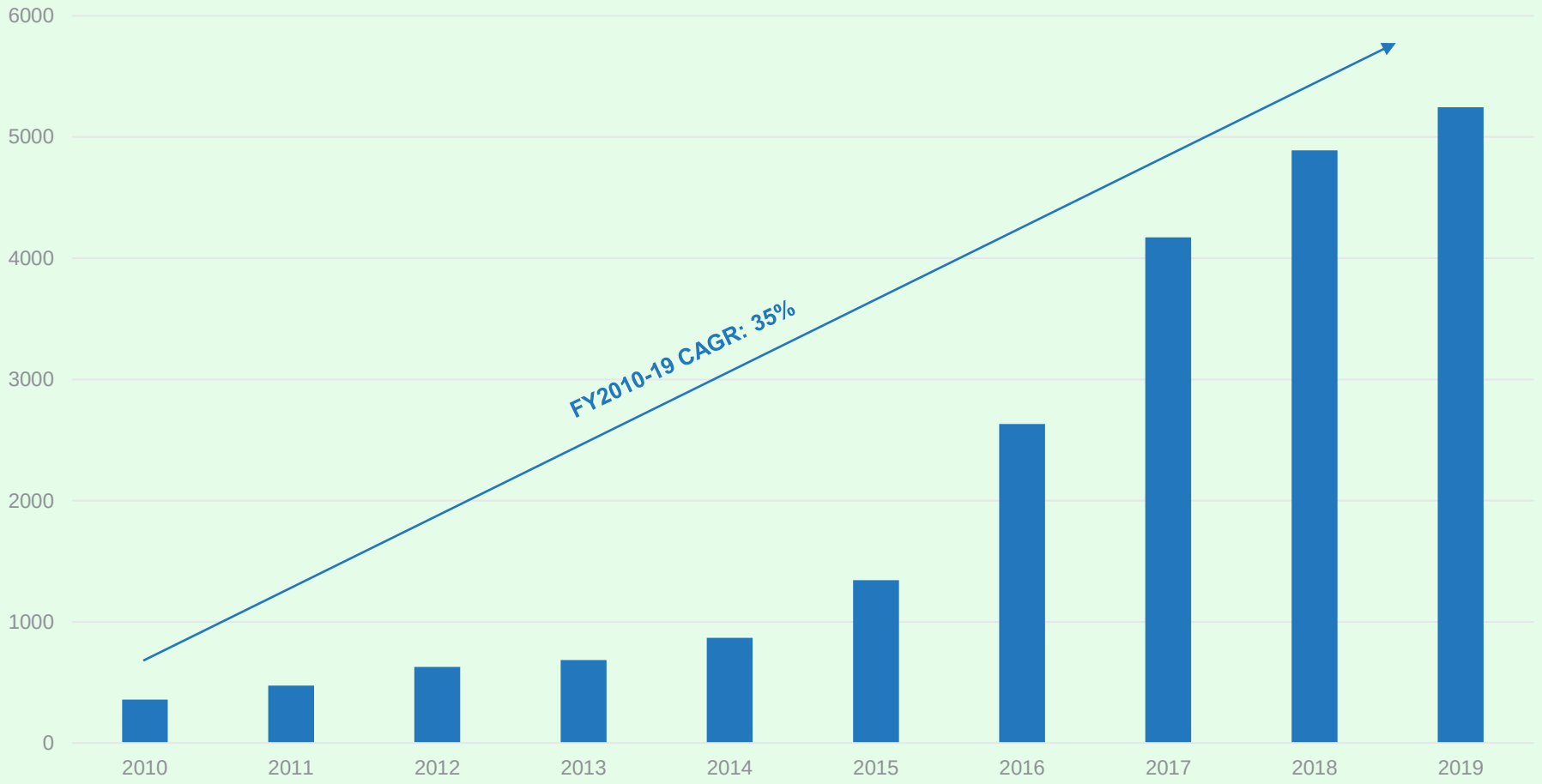


GanfengLithium

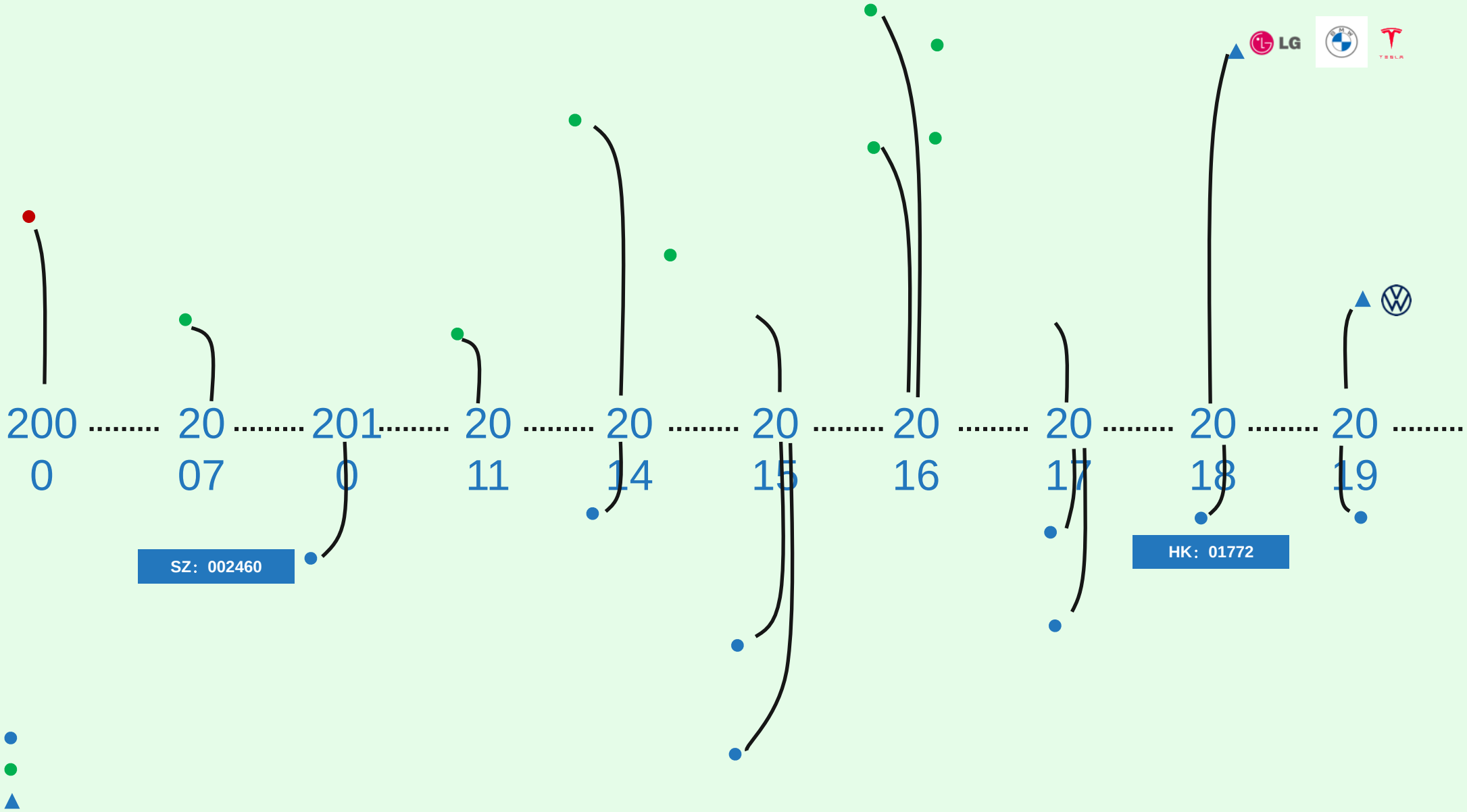
Proven Financial Track Record

Revenue | Revenue Growth

(RMB mm, %, RMB 000/ton)

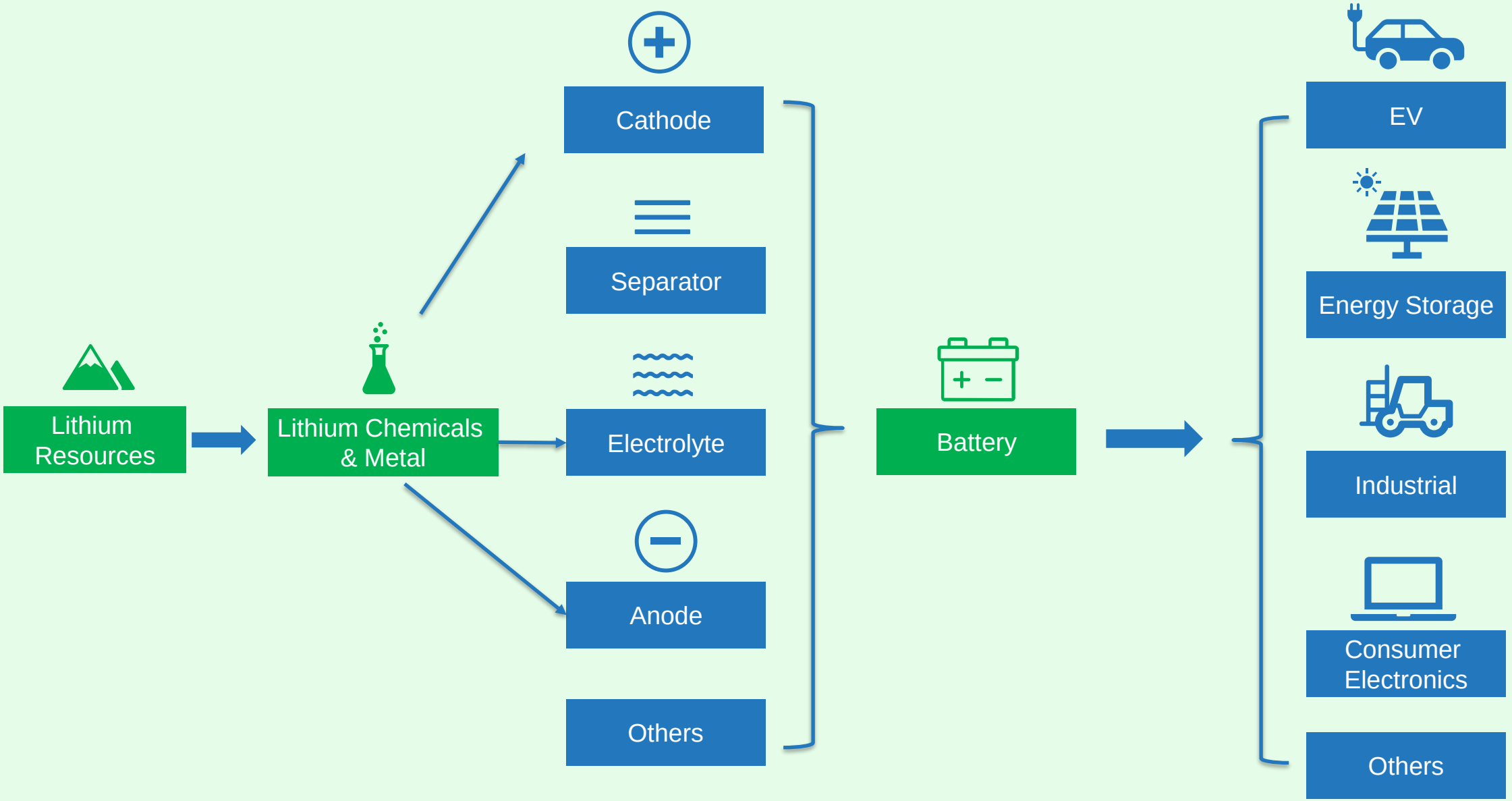


Pace Never Stop



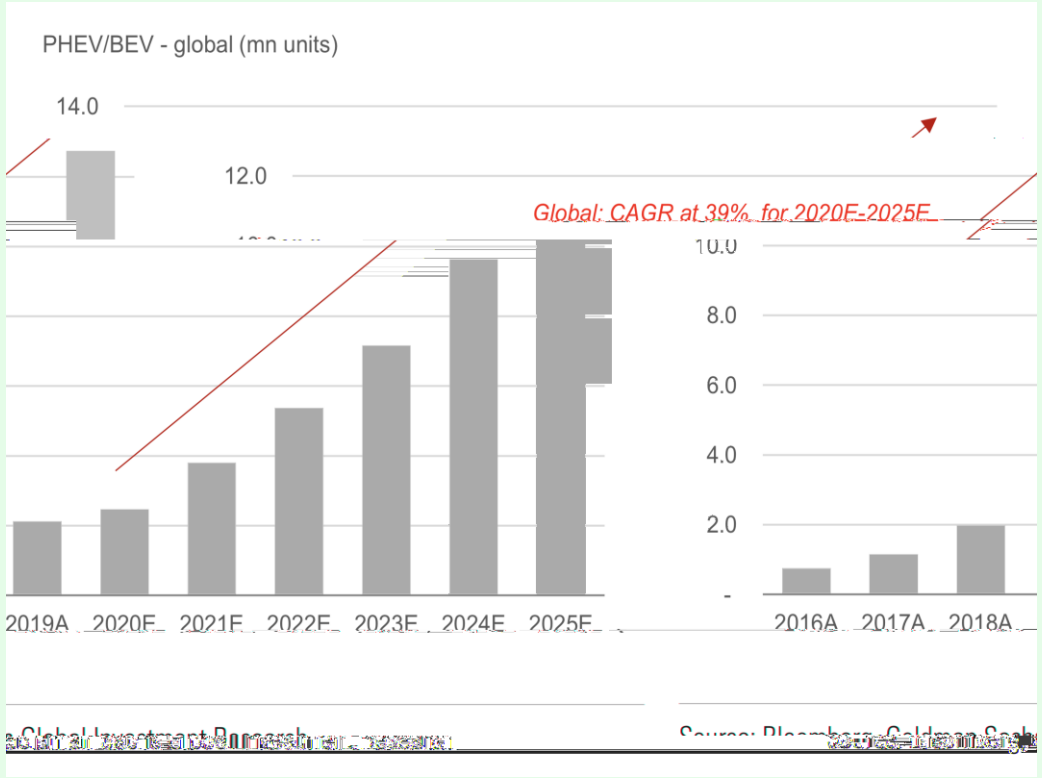
Ganfeng Strength

Battery Supply Chain



Expected Strong End Market Demand Propelled by Transition to EV

Lithium Resources → Lithium Chemicals & Metal → Battery Materials → Battery → EV → Recycle

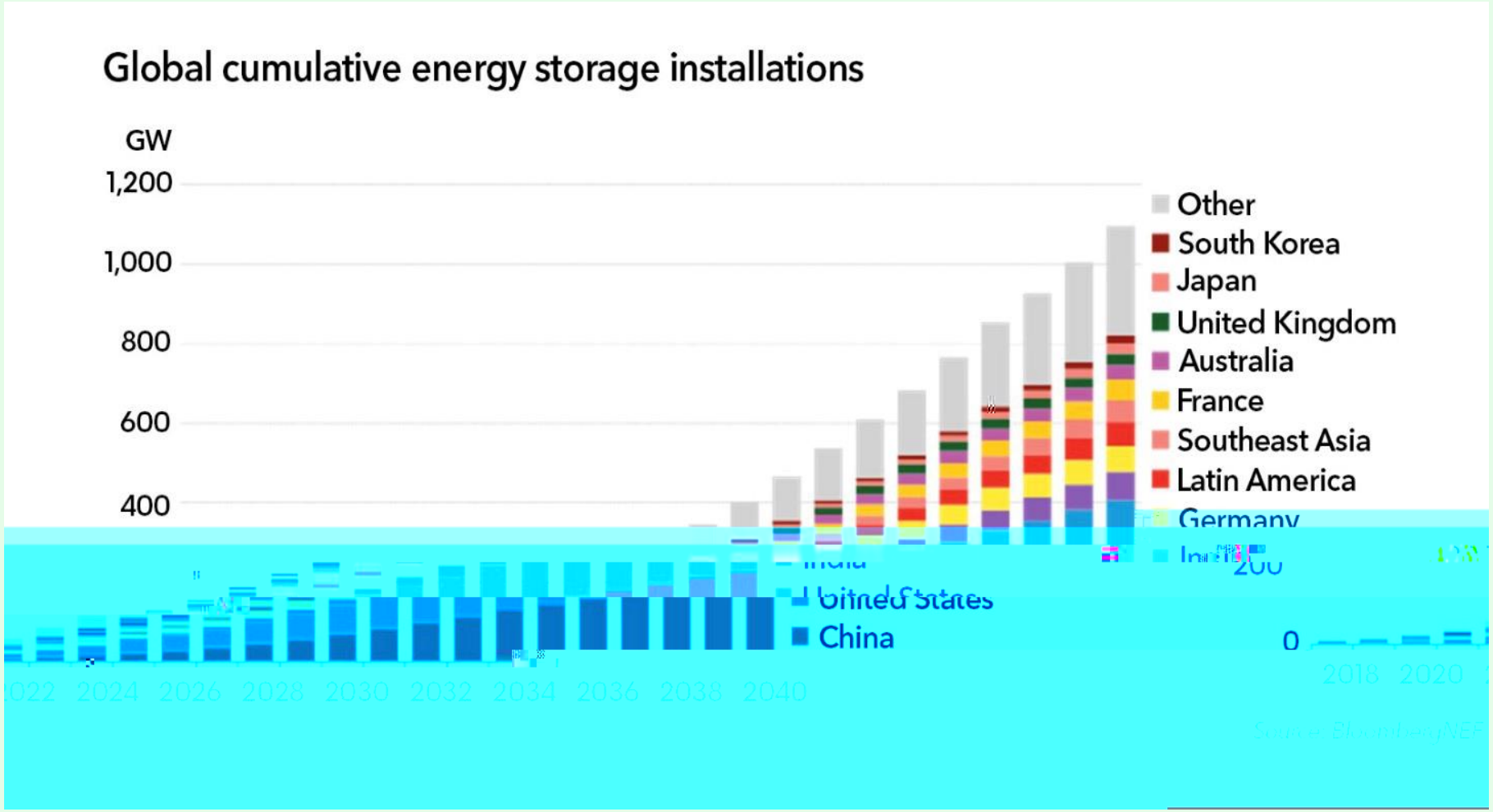


Brand	Models	Category	Battery size(kWh)	Range(km)	0-100 km/h(s)	Expected Launch Time
Tesla	Model Y	BEV	72.5	410/425	3.7/5.1	2021
	Roaster	BEV	200	970	2.1	2022 June
	Cybertruck	BEV	100/120/200	390/460/750	2007/5/3	2022 March/2022 December
VOLKSWAGEN	ID.3	BEV	45/58/77	275/350/450	2010/9/7	2020 2H
	ID.Crozz	BEV	83	500		End of 2020
	ID.4	BEV	77	420	7.5	2021 March
BMW	iX3	BEV	74	350	6	2020 August
	i4	BEV	80	450	4	2021 January
	545e xDrive	PHEV	12	54	4.7	2020 2H
BYD	Han EV	BEV	76.9	605/550(NEDC)	7.9/3.9	2020 July
	Han DM	PHEV	15.2	81(NEDC)	4.7	2020 July
	Tang EV	BEV	83	565/505(NEDC)	8.9/4.4	2020 August
	Tang DM	PHEV	17.1/18.5/22.3	81/100(NEDC)	5.1/4.3	2020 August
SAICMOTOR	VW ID.4 X	BEV	83	555		2020 October
	Roewe R ER6	BEV	69.9	620(NEDC)		2020 August
RENAULT	Twingo ZE	BEV	21.3	130	12.6	2020 2H
VOLVO	XC40 P8 AWD Recharge	BEV	75	375	4.9	2020 2H
AUDI	e-tron Sportback 50 quattro	BEV	64.7/86.5	290/335/320	6.8/4.5	2020 2H
	e-tron GT	BEV	83.7	425	3.5	2021 February
	Q4 e-tron	BEV	77	400	6.3	2020 December
	Q4 Sportback e-tron	BEV	77	410	6.3	2021 February
MERCEDES-BENZ	EQV 300 Long	BEV	90	330	10	2020 2H
	EQA	BEV	60	350	5	2021 March
TOYOTA	Lexus EZ 450E	BEV				
	2021 Toyota Venza	HEV				2021
	Toyota RAV4 PHEV	PHEV	18.1	95	6	2020 June
HYUNDAI-KIA	IONIQ 5	BEV				2021
	IONIQ 6	BEV				2022
	Elantra Hybrid	HEV	1.32			End of 2020
NISSAN	Ariya(2WD)	BEV	65/90	430/450/580/610	5.1/5.4/7.5/7.6	2021
NIO	EC6 Sports	BEV	70/100	430/605/615(NEDC)	5.4/4.5	2020 July

Source: Broker research, Minmetals.

Expected Strong End Market Demand

Lithium Resources → Lithium Chemicals & Metal → Battery Materials → Battery → **Energy Storage** → Recycle



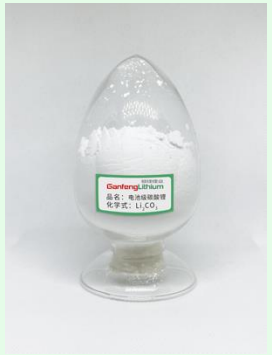
Ganfeng Lithium- Boost Production Capacity

Lithium Resources → **Lithium Chemicals & Metal** → Battery Materials → Battery → End Use → Recycle

No.1
Lithium Metals Production Capacity Globally

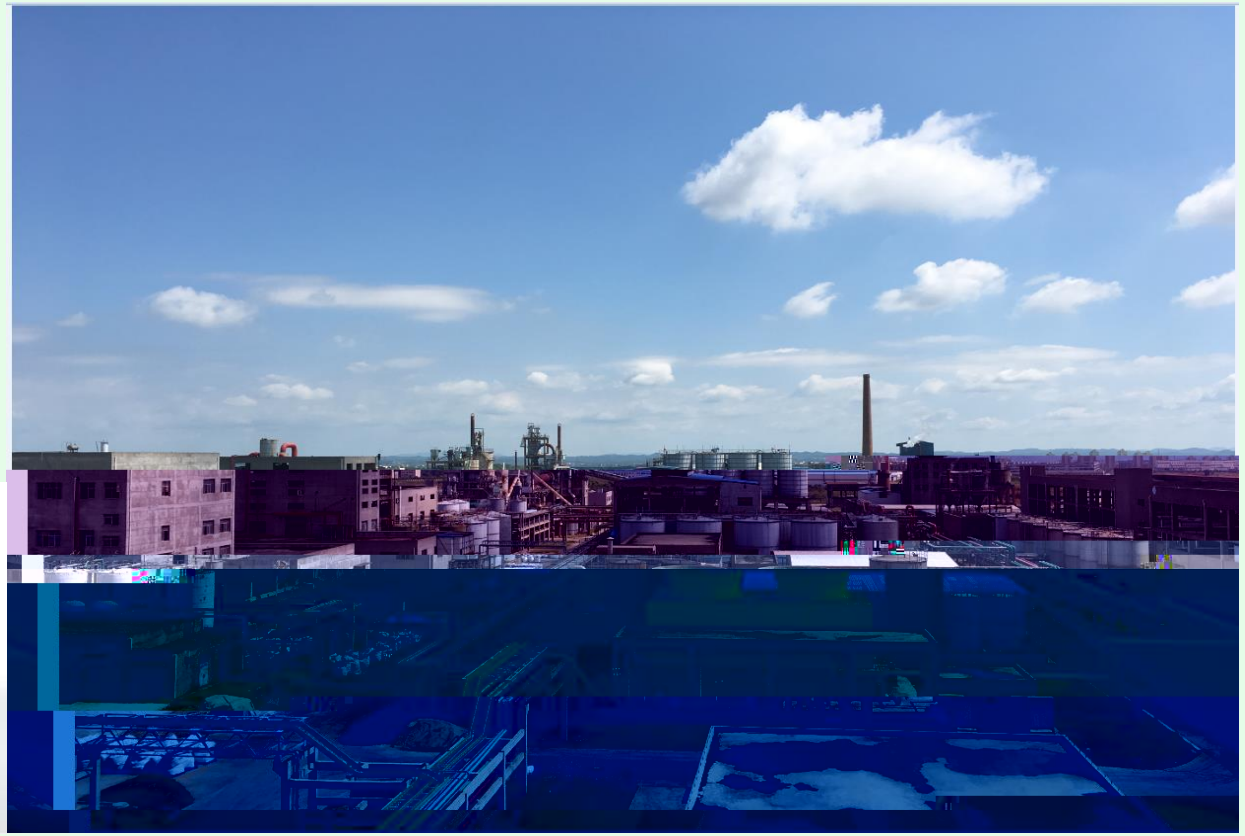
No.2
Lithium Hydroxide Production Capacity Globally

Lithium Hydroxide



Lithium Carbonate

Lithium Metals



Xinyu Basic Lithium Plant

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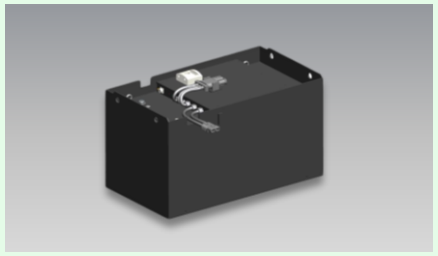
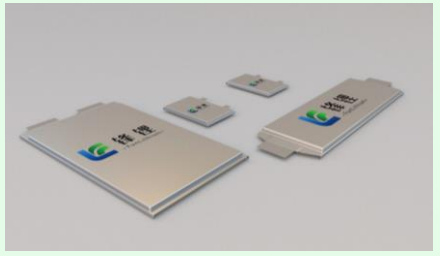
Ganfeng Lithium- Cutting-Edge Battery Products

Lithium Resources → Lithium Chemicals & Metal → Battery Materials → **Battery** → End Use → Recycle

- Consumer Battery
- Energy Storage System
- Lithium Polymer Small Battery
- Industrial EV Power Battery
- Solid-State Battery

Primary Products: LCO, LFP

End Market Applications

Consumer Electronics (smartphones, tablets, laptops, Wireless earphones)

Energy storage (house-hold, industrial and utility applications)

Next- -state (EVs, drones)

Ganfeng Recycle

Lithium Resources → Lithium Chemicals & Metal → Battery Materials → Battery → End Use → **Recycle**

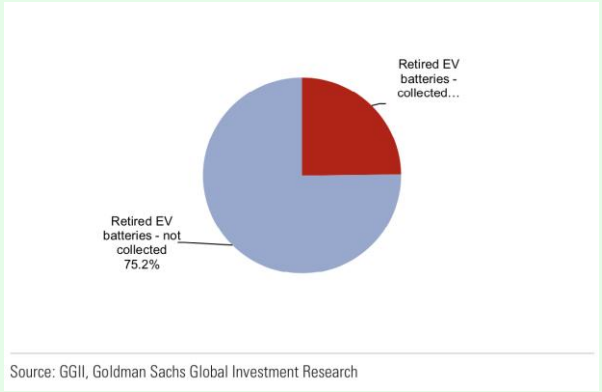
Retire Battery Recycle

Primary Products: lithium carbonate, NCM precursor

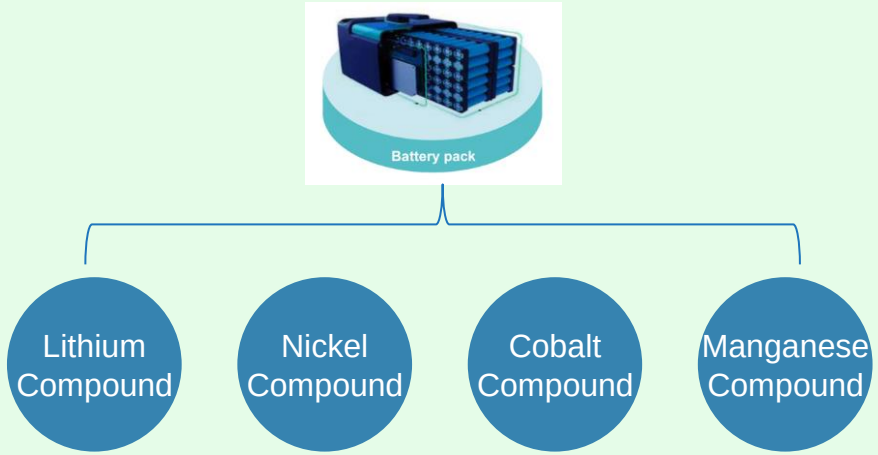
Capacity: process capacity of 34kt batteries/year

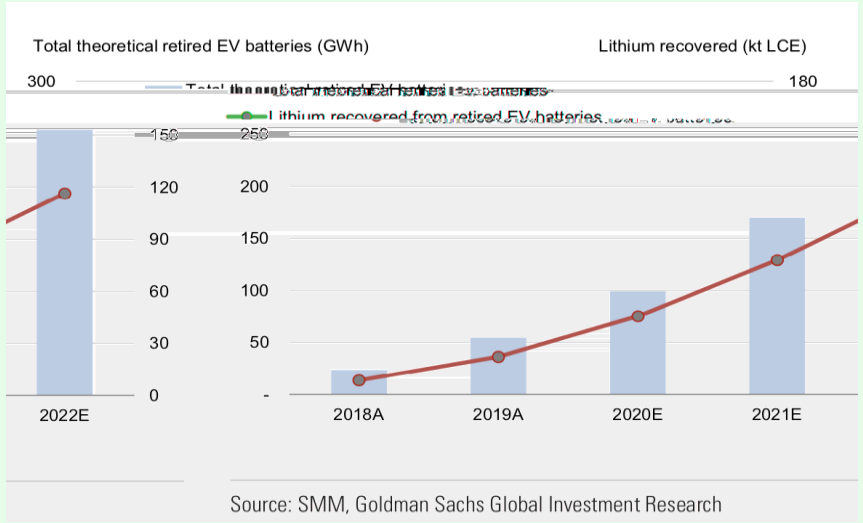
Growth: 200% expansion planned 2020/2021

Customers: recovered lithium sold on to lithium chemical customers or used internal to produce lithium derivatives



Source: GGII, Goldman Sachs Global Investment Research





Source: SMM, Goldman Sachs Global Investment Research

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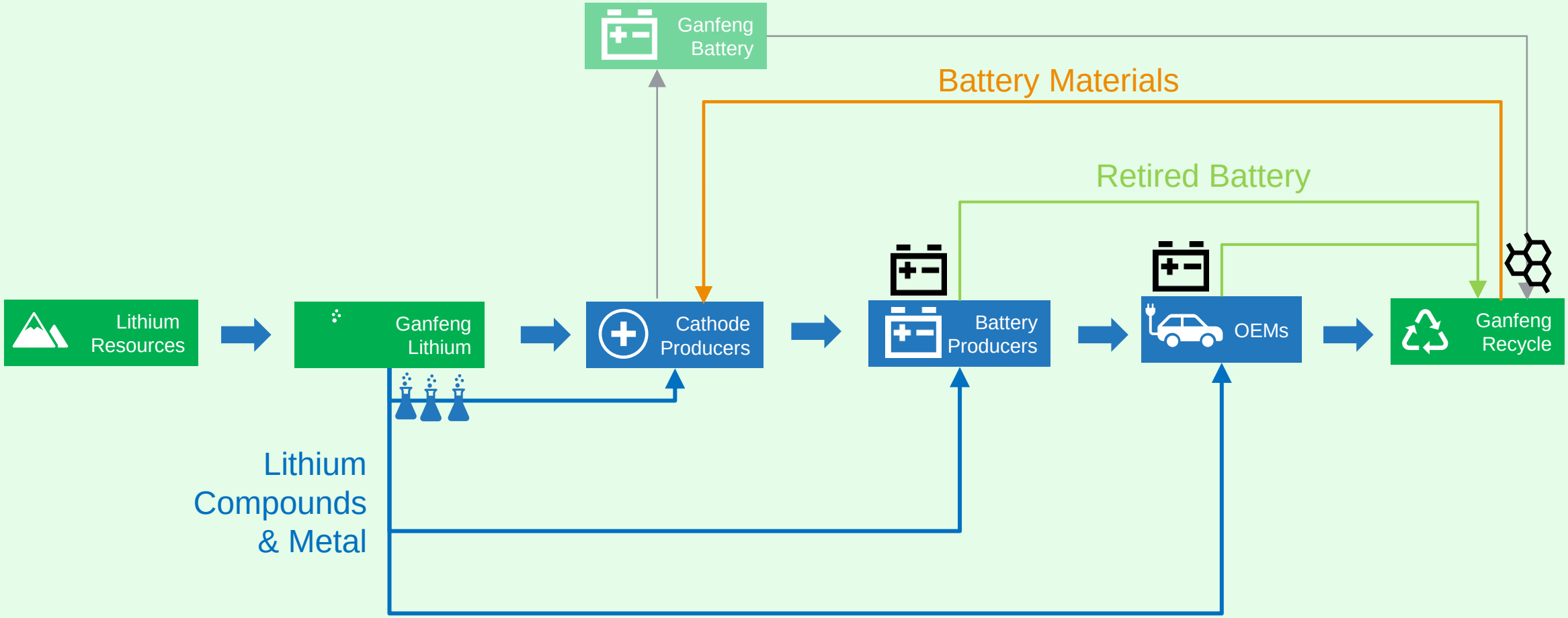
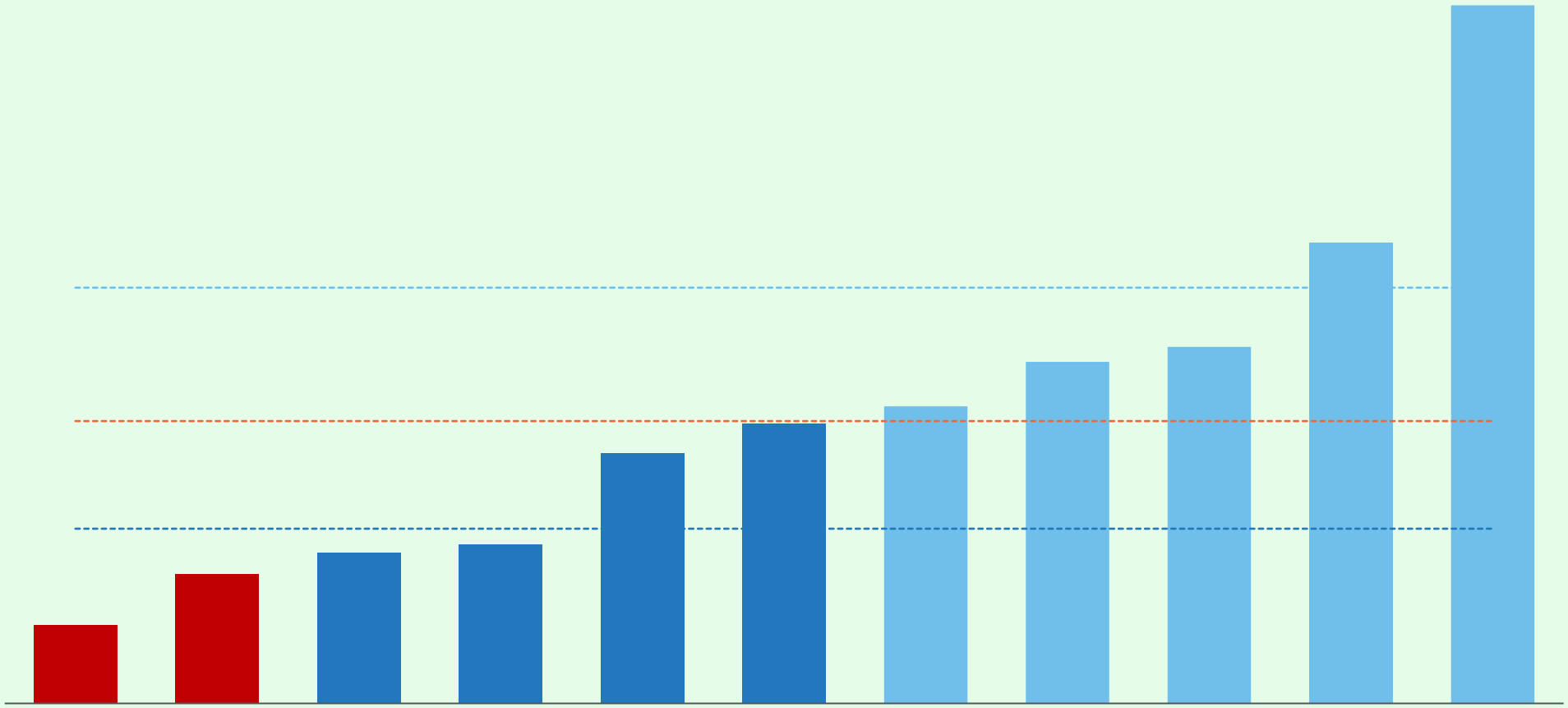
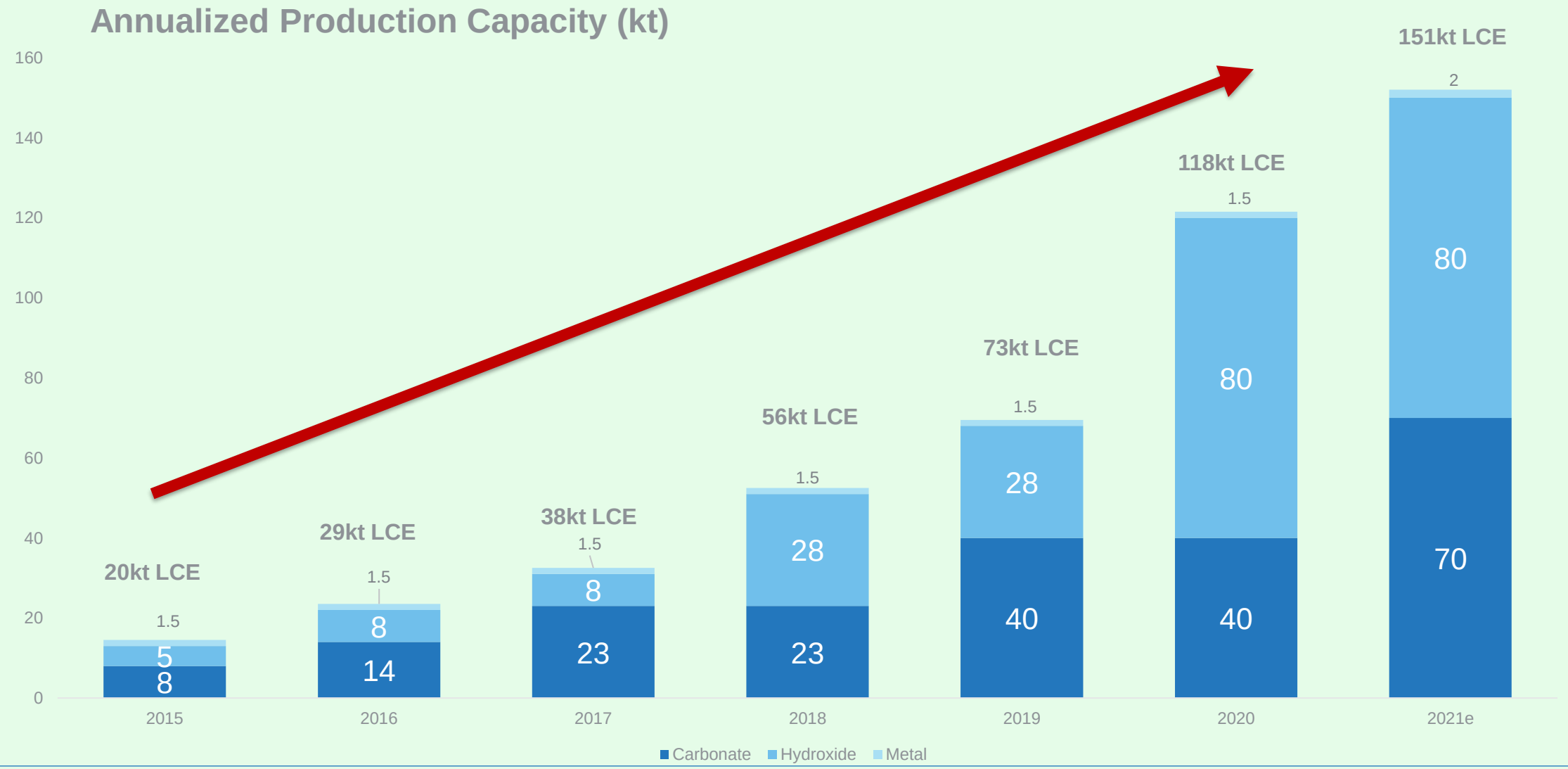
Ganfeng Lithium Ecosystem



Lowest-CAPEX Intensity for New-Build Capacity



Strong Supply Capacity



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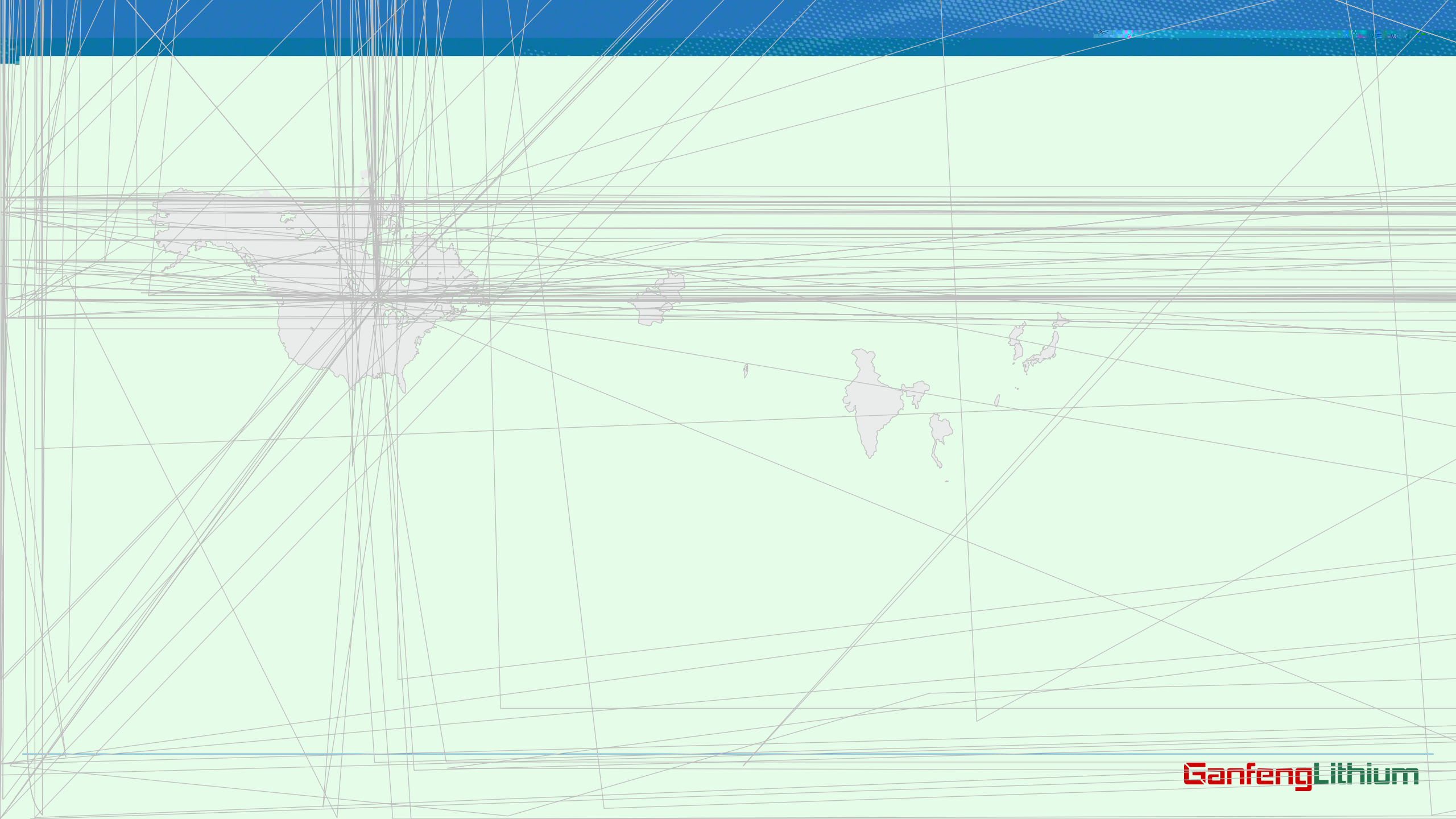
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Sustainability

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Sustainability

Sustainability-Case in Argentina

Mariana

Pumping the brine below the recharge rate

Plan to build solar power and energy storage for most of our power demand

Carefully locate production site

Minera Exar

Utilize Solar Power

Use non-potable water

* Photo from internet

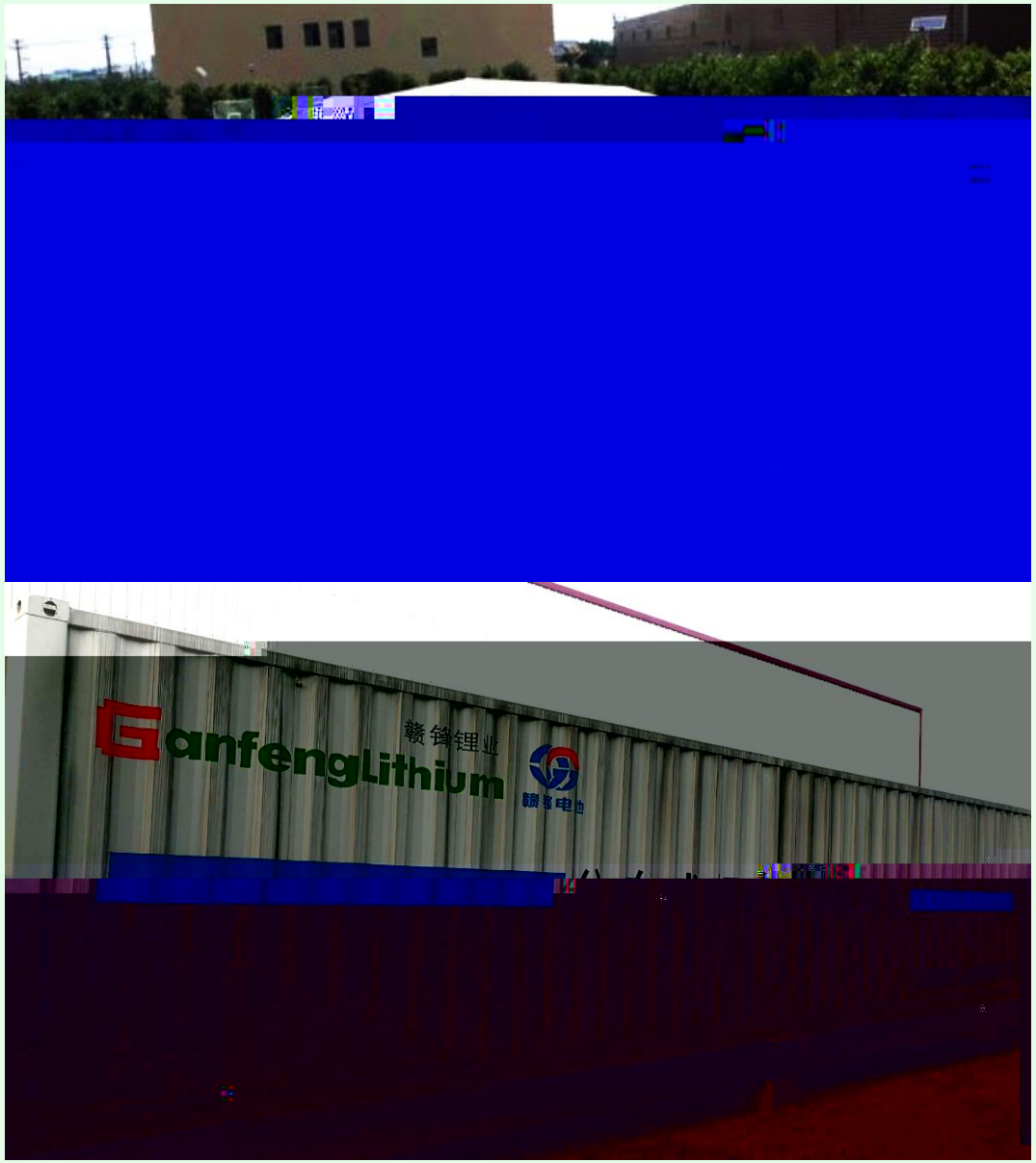
Sustainability-Case in China

Ganfeng Battery

Utilize solar power, install solar panels on the roof of factories and office buildings

Generate in 2019

Reduced carbon emission



Ganfeng Energy Storage

Jiangsu user side commercial energy storage project

Dongguan user side commercial energy storage project

Guangzhou user side commercial energy storage project

2025 Strategic Goals

Target Production: 200kt LCE

Continue to supply leading automotive OEMs, Cathodes Companies and Battery Companies

Aligned with the most aggressive participants in the EV Supply Chain

Build Flexible Production Capabilities

- Continue to ensure flexibility in production mix

Lower production costs by focusing on lowest-cost resources and processes

LiOH from Australian Hardrock + China Conversion

Carbonate from Argentina Brine (Cauchari 40kt w/ reserves to allow for further capacity expansion)

Continue to backward integrate to secure feedstock materials and lower costs

Mariana (Argentina Brine, Chloride), Bacanora (sedimentary, LiOH)

Maintain position as largest producer of Li Metal for advanced chemistry Li-Ion Battery Technology

The End

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