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## **Why We Must Develop a Domestic Battery Manufacturing Equipment Supply Chain**

The U.S. currently lacks a domestic equipment manufacturer capable of supplying a complete battery manufacturing line. Dependence on foreign supply chains creates significant vulnerabilities, as highlighted by NorthVolt's bankruptcy, including geopolitical risks, increased exposure to intellectual property theft, and a weakened domestic ecosystem for advanced battery technologies. To maximize the effectiveness of the CEC program and align with California's broader goals of energy innovation and sustainability, it is crucial to prioritize the development of a domestic manufacturing equipment line over reliance on foreign suppliers for the proposed pilot line.

While developing domestic solutions may require a higher upfront investment and longer development timelines, a pilot manufacturing line based on domestically developed equipment would enable tailored solutions to address the unique needs of battery technology innovators, facilitating cutting-edge advancements and rapid prototyping and thus, enhancing resilience within the battery technology sector.

CEC has a unique opportunity to tackle this challenge by mandating that the pilot manufacturing line utilize equipment sourced from domestic suppliers. This strategy will strengthen the California's position in clean energy technology, enhance long-term strategic competitiveness, and ensure the resilience and sustainability of the domestic battery manufacturing ecosystem.