

PULSE ON THE POWER MARKET //

Storage



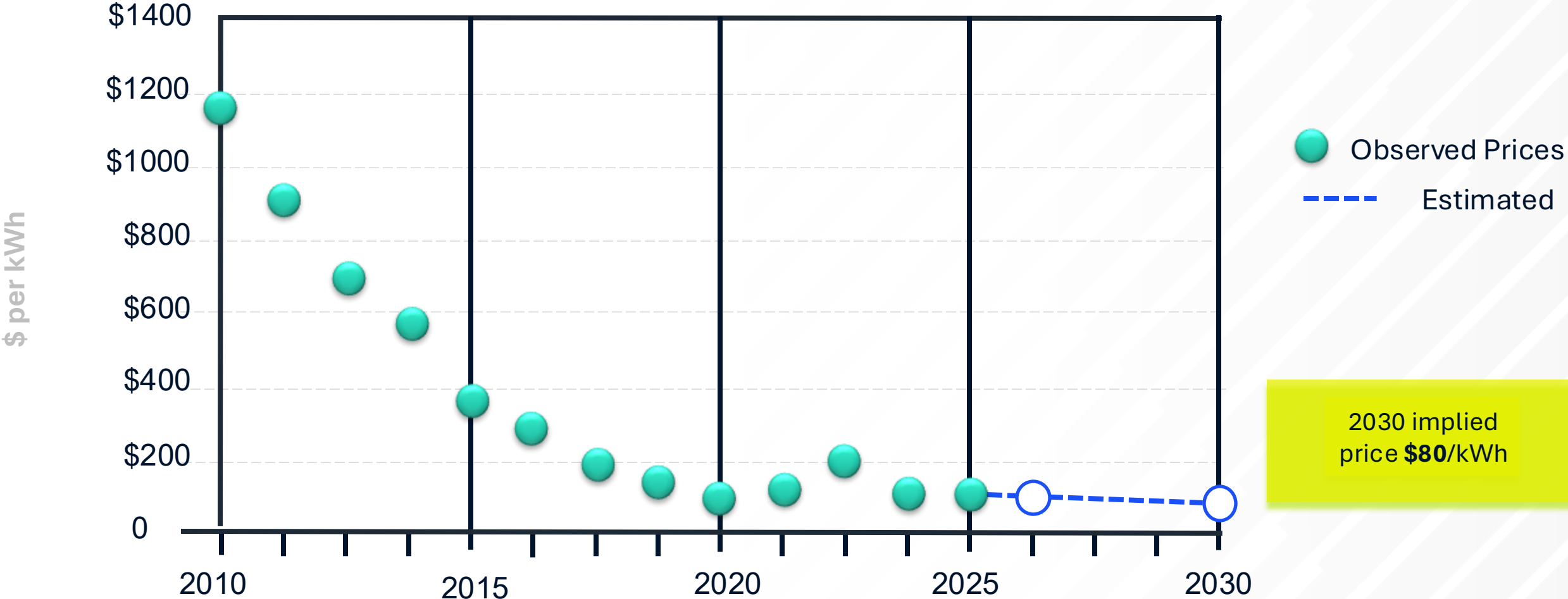
Chris Ruckman

Vice President

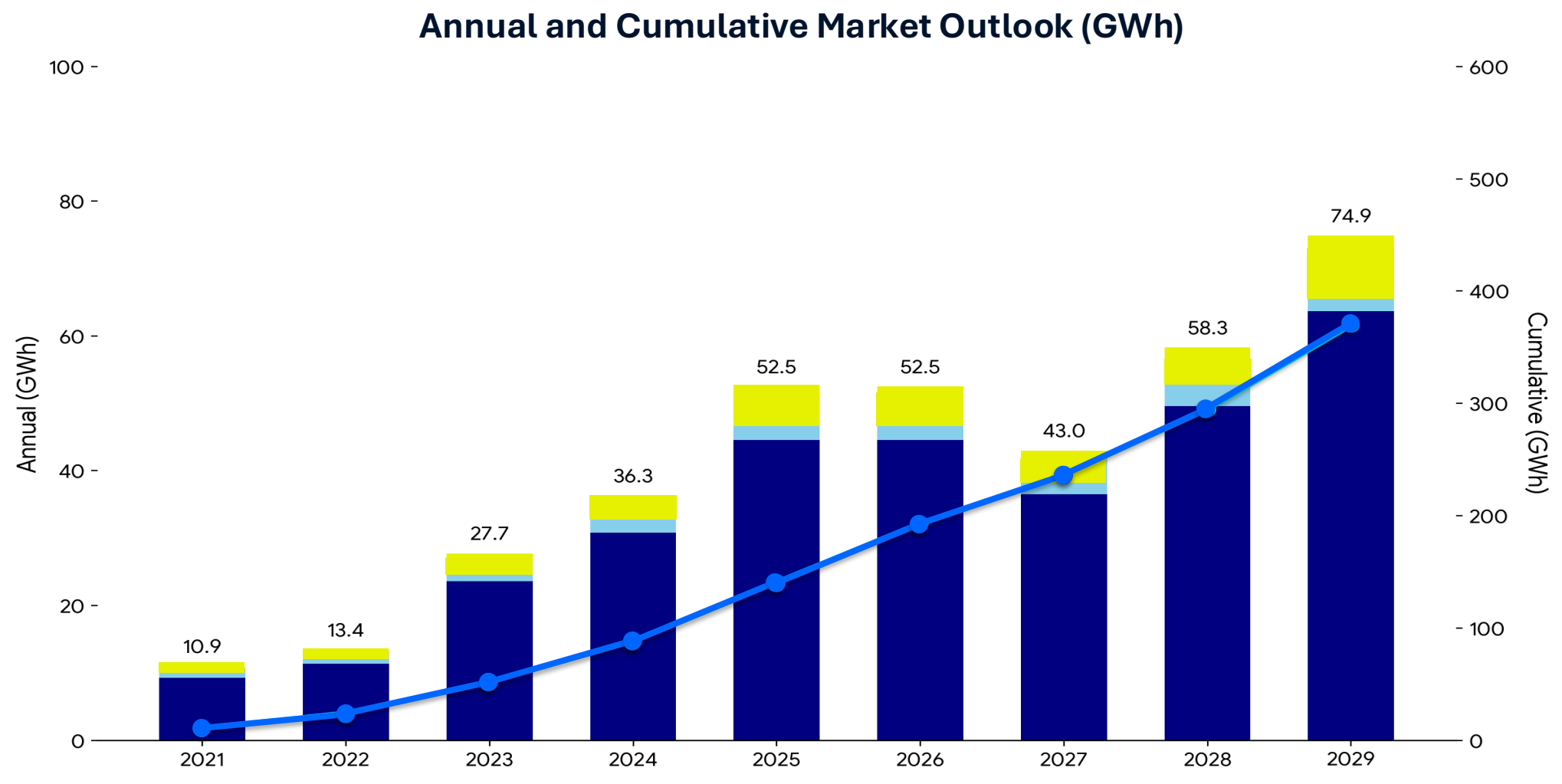
pulse
on the power market

2025 GENERATION SYMPOSIUM

Price



Installed MWh



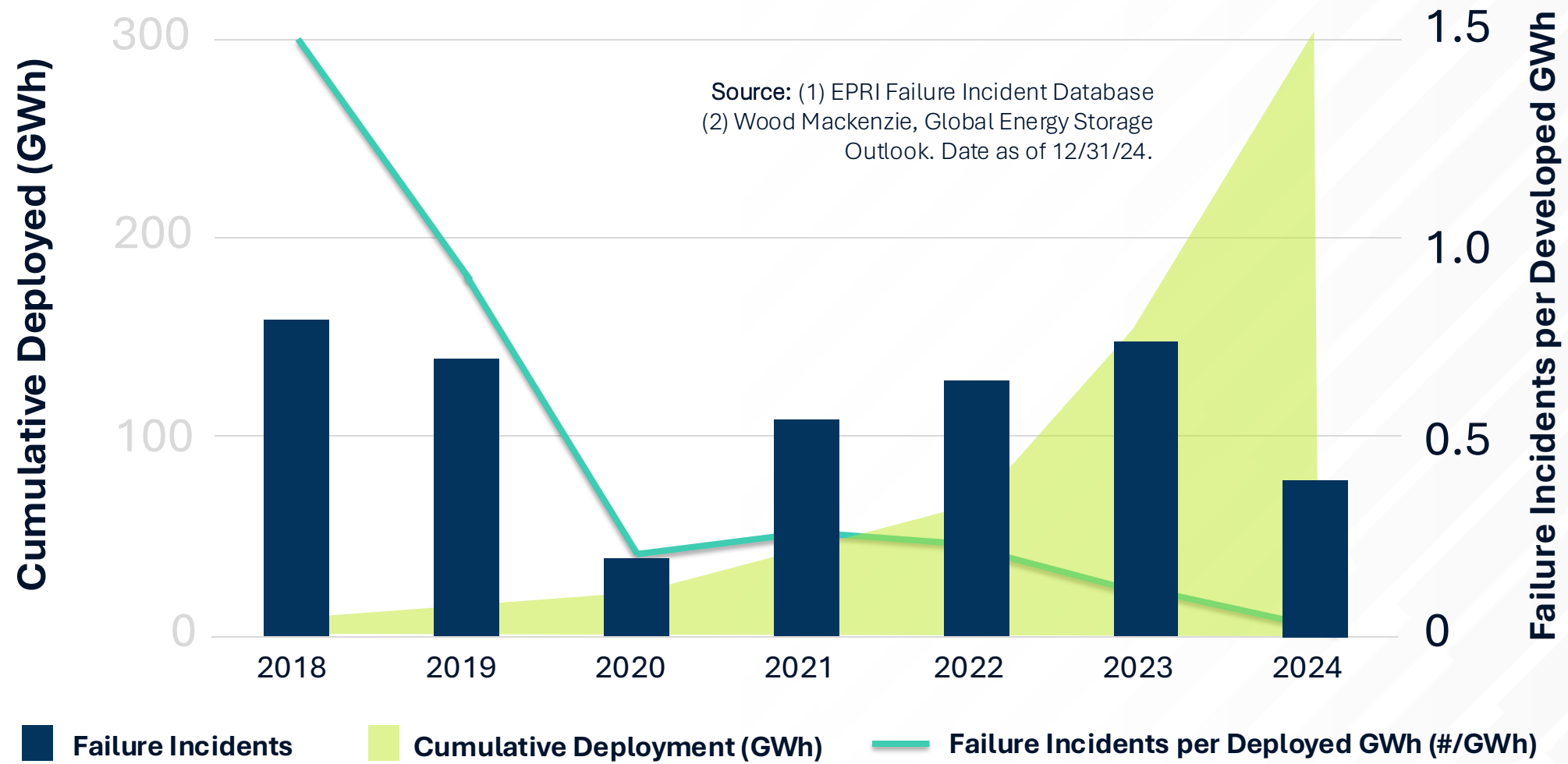
BYOB (Bring Your Own Batteries)

Batteries are becoming the **Swiss army knife**, solving many issues.

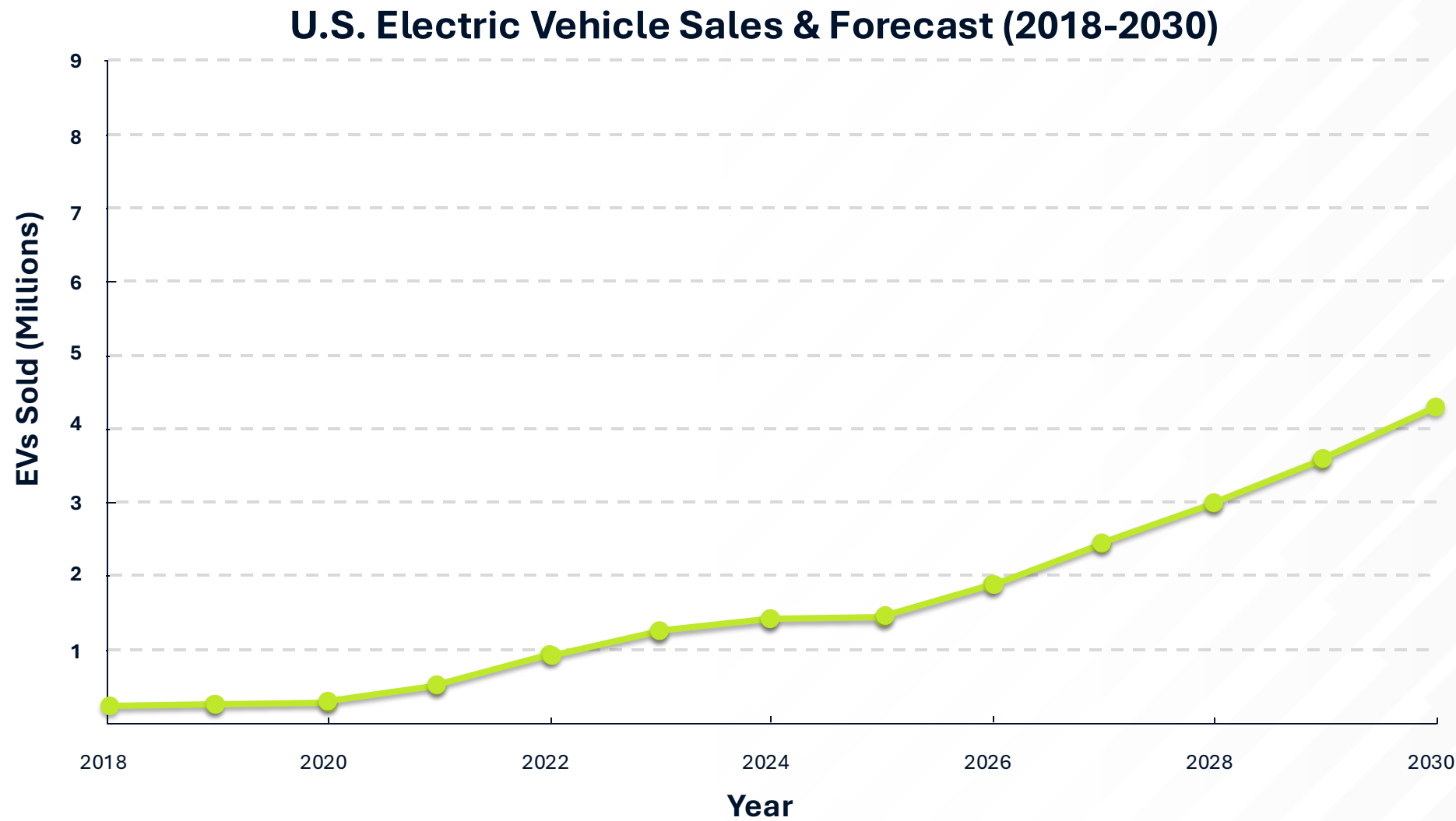


Safety

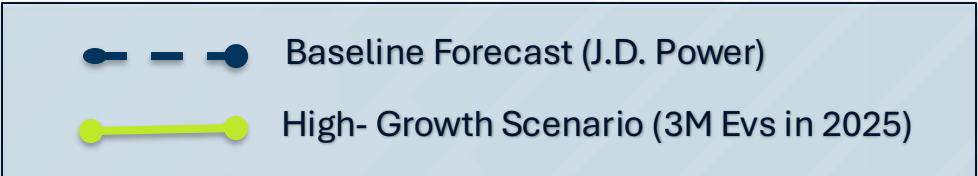
Global Grid-Scale Storage Deployment and Failure Statistics



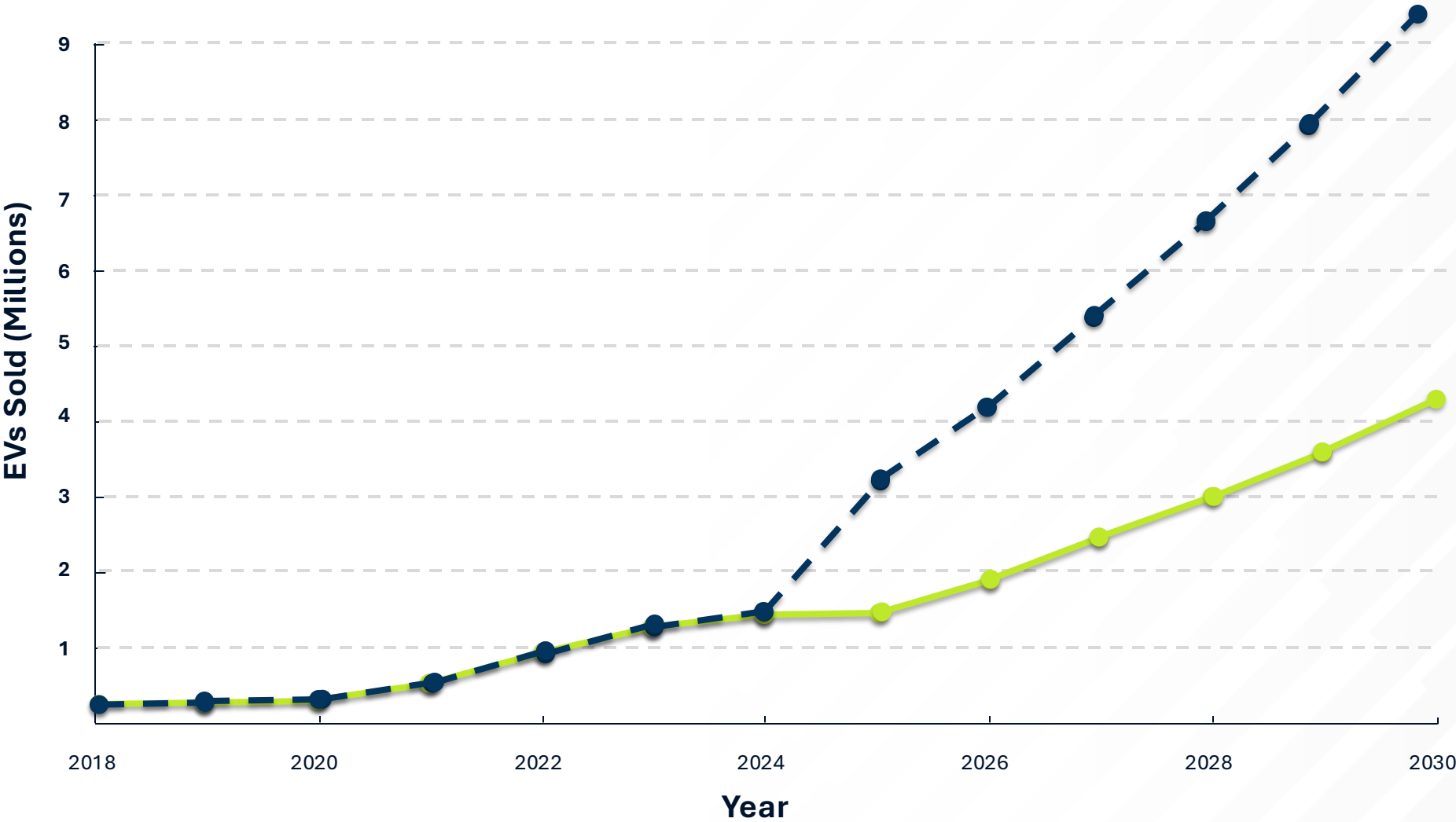
US EV Demand



US EV Demand



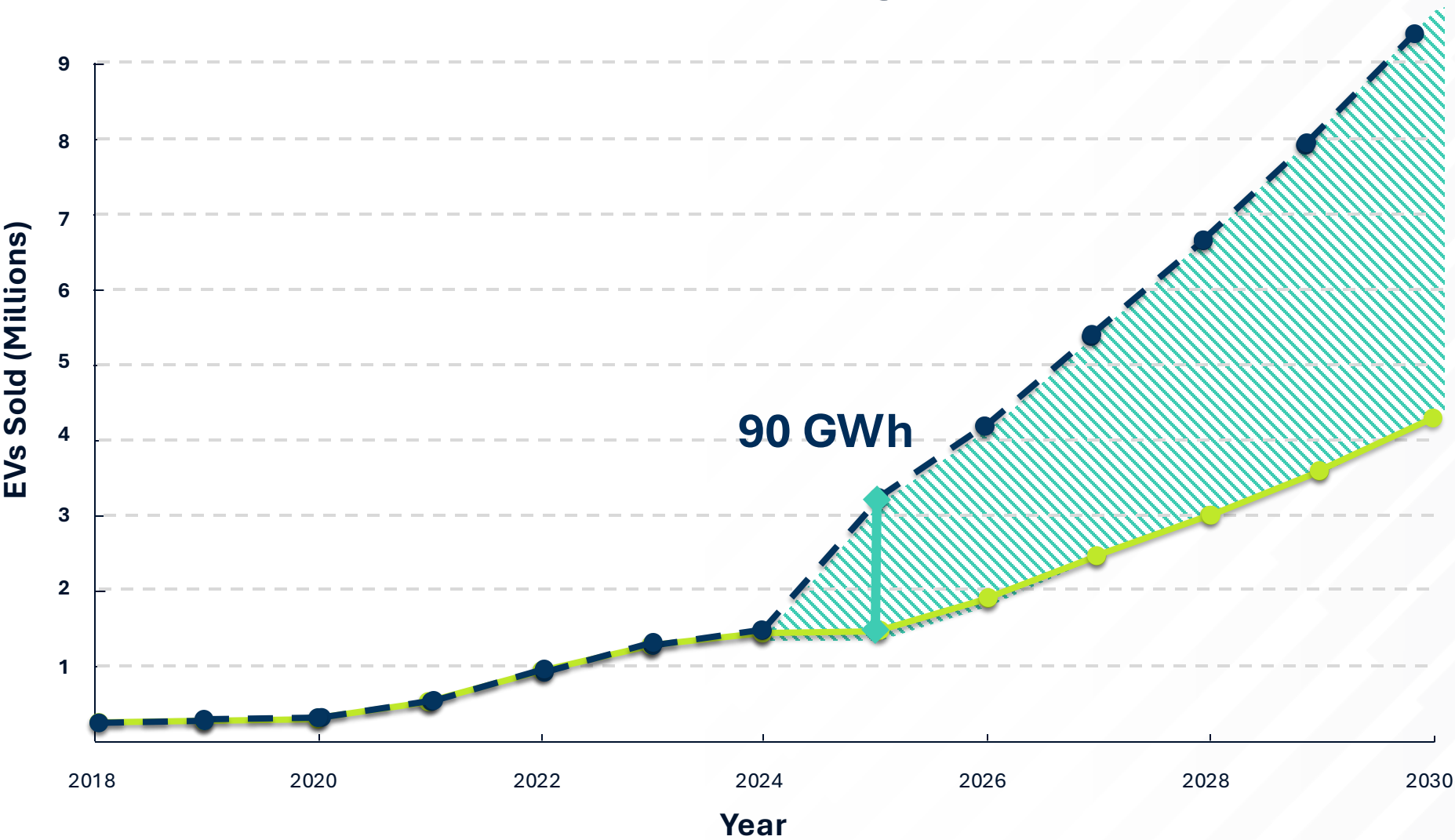
U.S. Electric Vehicle Sales: Baseline vs. High-Growth Scenario (2018-2030)



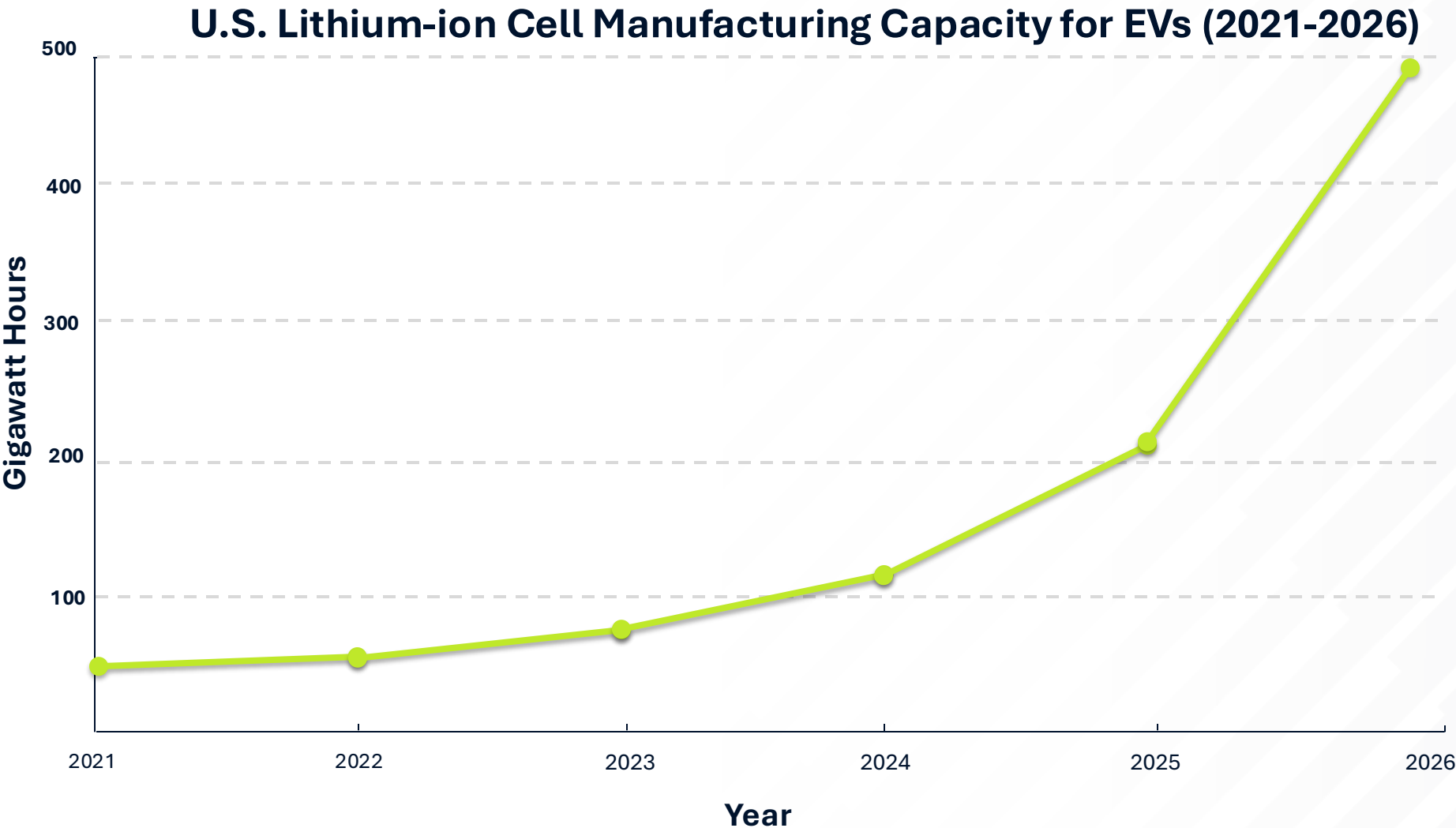
US EV Demand



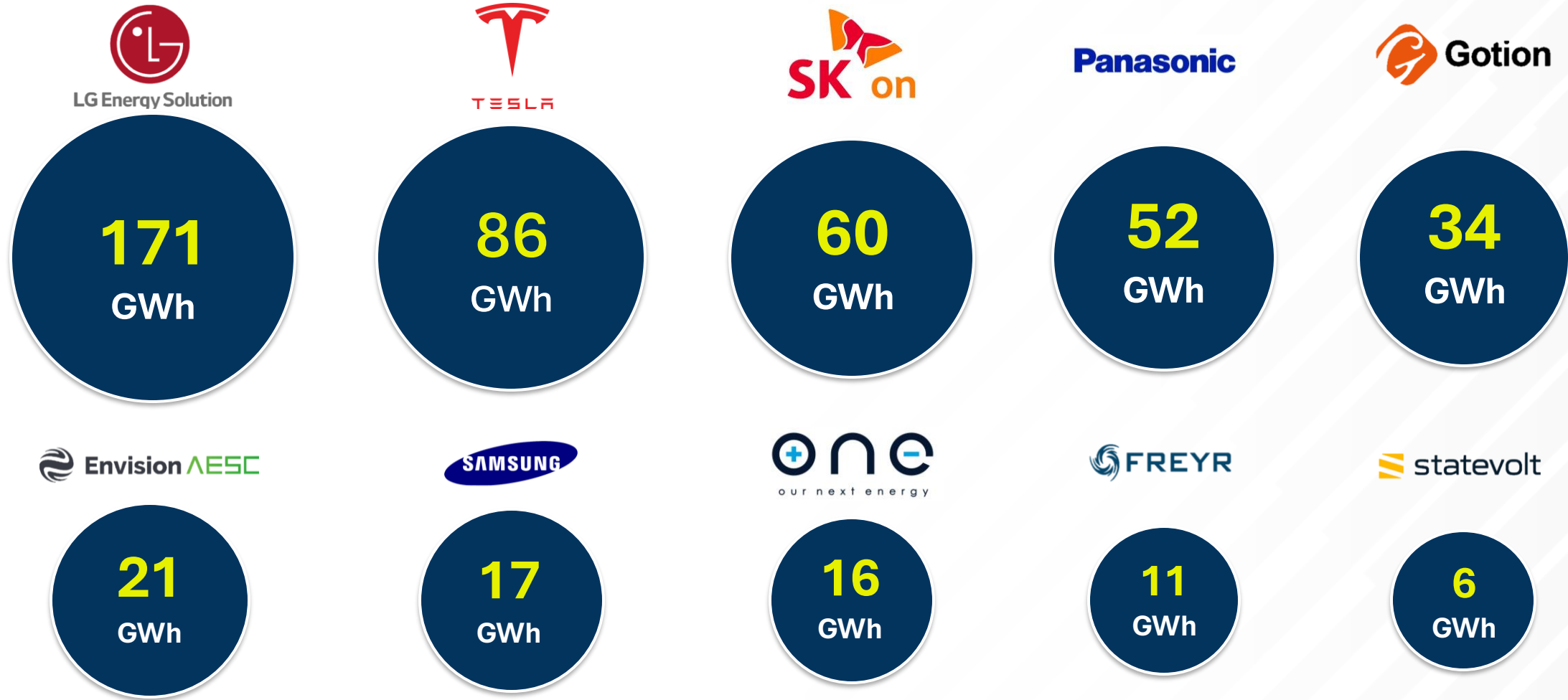
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US ESS Capacity



US Energy Storage OEMs



Notes: Figure uses Argonne modeled capacities (NA) and filters to companies producing cells in the U.S. by 2026; excludes Canada-only (e.g., PowerCo/Northvolt).



Foreign Entity of Concern (FEOC)

2025

FEOC rules finalized under the OBBBA.

2026

FEOC compliance applies to energy storage -> 55% non-FEOC component cost required.

2027

Threshold increases by 5 percentage points per year (up to 75%).



China's Share of Critical Mineral Processing

