

Introduction to Leke Services

NAATBatt Lithium Battery Recycling & Lifecycle Management
Workshop VIII 2025

August 2025

LEKE SERVICES





Laolu Adeola

Managing Director

[LEKE SERVICES](#)

laolu@leke.services

LEKE SERVICES

- Help companies navigate mobility energy transition
- Help organizations scale within the battery ecosystem

McKinsey
&Company

- Battery Accelerator Team Lead
- \$20B+ electrification strategy for leading OEM
- Fleet Emissions Strategy for Fortune 500 companies



Product Development Engineer

- Aerodynamics
- Certification & Compliance

TrueCar®

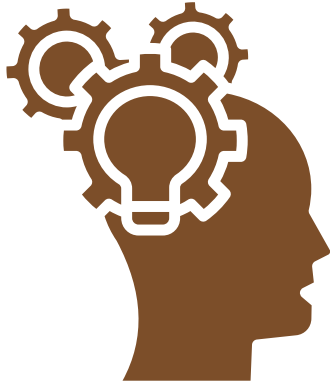
- Marketing partnerships with OEMs & leading brands



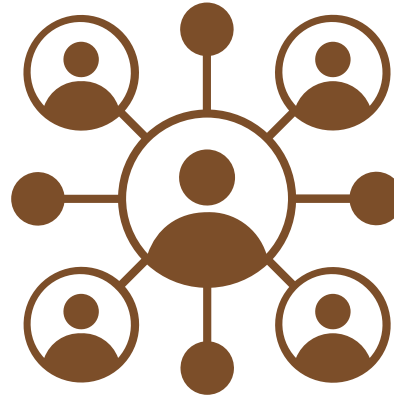
Faraday Future

- Supported \$2 billion equity raise,

Leke Services helps battery leaders navigate the rapid growth of the industry



15 years experience
across industry
verticals

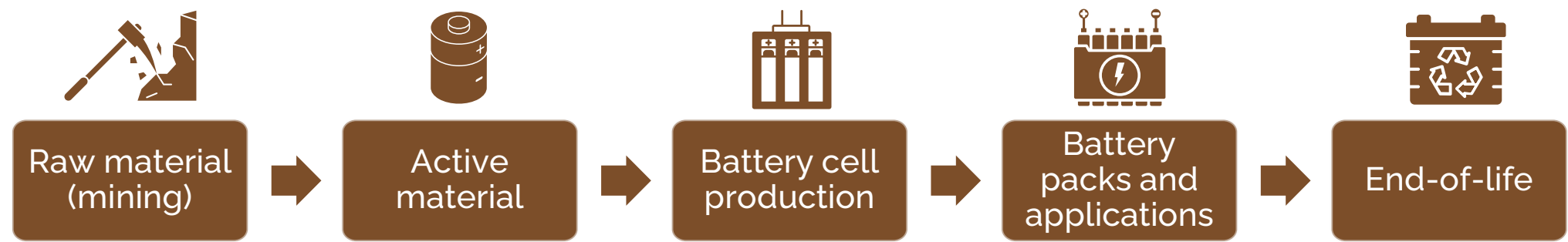


Extensive network of
experts across the
battery value chain



Proven models to
help leaders
navigate

The battery value chain in the US is growing quickly, but there are gaps to reaching its potential



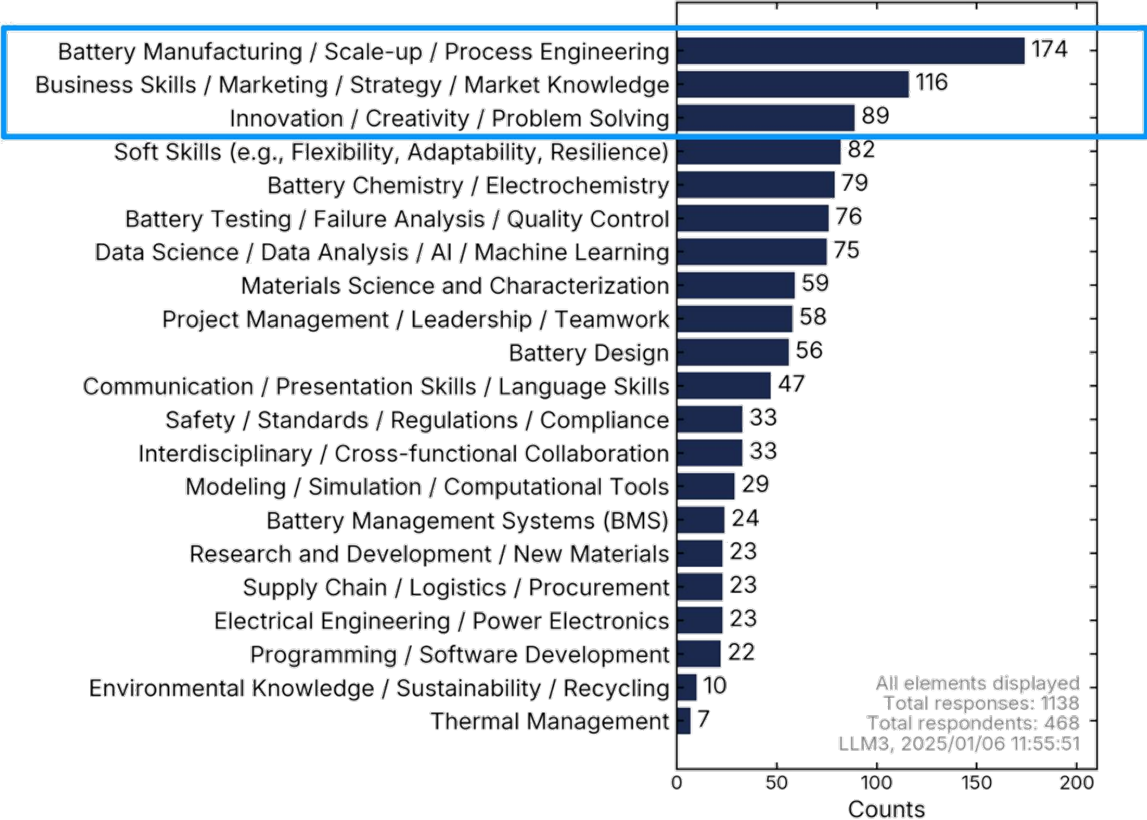
Trends	<ul style="list-style-type: none">\$3B+ DOE investment in U.S. lithium.\$625M from GM for Thacker Pass.	<ul style="list-style-type: none">Lyten's \$1B lithium-sulfur battery plant in NV could reshape battery chemistry.	<ul style="list-style-type: none">Ultium Cells scaling to 85 GWh (Ohio, Tennessee)	<ul style="list-style-type: none">Ford-SK On's Kentucky battery plants boost U.S. EV supply chain.	<ul style="list-style-type: none">Redwood Materials is leading a U.S. battery recycling boom.
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Gaps	<ul style="list-style-type: none">Heavy reliance on foreign cobalt and nickel; domestic mining faces slow approvals.	<ul style="list-style-type: none">Scaling new materials is expensive; U.S. lacks a robust supply chain.	<ul style="list-style-type: none">Skilled labor shortages and foreign tech dependence slow energy independence.	<ul style="list-style-type: none">Battery pack standardization lags, driving up costs and complexity.	<ul style="list-style-type: none">Recycling capacity is limited; collection and processing costs remain high.
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The 2025 Volta Foundation report highlights need for strategic support in the battery industry

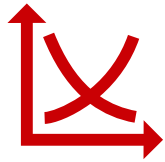
Source: Volta battery report

“IN YOUR OPINION, WHAT ARE THE TOP THREE SKILLS MOST IN DEMAND IN THE BATTERY INDUSTRY?”
(According to senior staff members and managers with hiring authority)



Leke Services understands the core challenges leaders face, and helps using proven solutions – adaptable to your needs

Common challenges



Lack of clarity about the market



Frequent cost overruns



Managing stakeholder demands

How we help

- Map supply risks & policies
- Assess policy and incentive impacts
- Benchmark competitors & tech
- Define market positioning & GTM strategy

- Identify inefficiencies in operations
- Develop KPIs & OKRs
- Optimize procurement strategies
- Enhance production scalability

- Leverage our friction report framework to improve:
- Align investor expectations with production realities
 - Strengthen supplier & OEM relationships
 - Navigate regulations & adoption

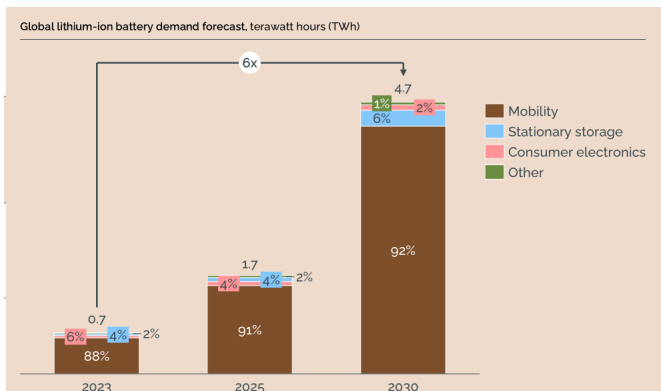
We strongly believe you need to understand the market before making operational improvements then address frictions

Helped a \$6 billion global supplier grow share in the battery industry

CASE STUDY

Situation

A global industrial supplier saw an opportunity to expand into battery factories, targeting opportunities across the value chain.



Approach

- Value chain analysis: Assessed key needs across the battery ecosystem
- Market sizing & prioritization: Conducted market sizing analysis for resource allocation

Outcome

- Go-to-Market plan for \$1B revenue announced by the company's leadership during an earnings call.

Helping a U.S. state build an economic plan for their lithium resources

CASE STUDY

Situation

US state with a long mineral extraction history looking to build attractive ecosystem for lithium economy.



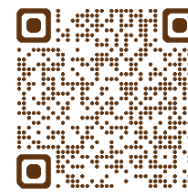
National
Science
Foundation

Approach

- Value chain mapping:
Identified economic opportunities in lithium extraction, processing, and battery production.
- Stakeholder engagement:
Conducted interviews across government, industry, and academia to align interests.

Outcome

- Advanced to next round of NSF Engines for regional innovation funding.
- Secured stakeholder buy-in across government, industry, and research sectors.



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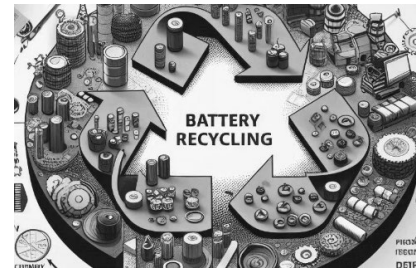
The Lane with LEKE SERVICES



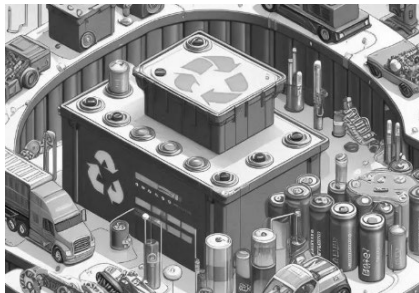
Bridging the U.S. Battery Supply Chain Gap: The Active Materials Challenge
MAR 2025



Lithium Sourcing in the US: Is DLE really the key to The Lithium Revolution?
NOV 2024



Getting to 2030: What battery recycling companies must do to survive
JULY 2024



How to make battery recycling work for both the environment and economy
MAY 2024



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“THANK YOU” in Yoruba

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