



# TT 252 Wide Release

Recording Date: 10/26/2022

<https://tinyurl.com/3dbt567z> - This is to Apple Podcasts

<https://tinyurl.com/2s6puysv> - This is for the Patreon Page

**Mel** ♦ **Robert** ♦ **Tom** ♦ **Joel** ♦ **Guest**

	Today(+/- 20 min)	Since Last Show	30 Day Change	YTD Change
TSLA	228.52	8.18%	-5.73%	-42.86%
RIVN	34.48	10.02%	8.12%	-66.43%
LUCID	14.23	11.17%	0.99%	-65.23%
NIO	9.69	2.54%	-37.44%	-71.05%
NASDAQ	11,102.45	1.37%	2.65%	-29.88%
S&P 500	3,901.06	2.73%	6.05%	-18.67%

## Show Structure

1. Introduction/rants and raves! -
  - a. Joke of the day
2. Story 1 - Toyota EV reboot - 2 articles below
3. Story 2 - Hyundai EV plant breaks ground in the US (Georgia)
4. Space Update
5. SC report - Need to add later
6. HM Media Picks - CAN WE DO THIS FIRST!!!

## TESLA, THE STOCK & EV STORIES

### **Exclusive: Toyota scrambles for EV reboot with eye on Tesla**

<https://www.reuters.com/business/autos-transportation/exclusive-toyota-scrambles-ev-reboot-with-eye-tesla-2022-10-24/>

- Toyota is considering a reboot of its electric-car strategy
- if adopted, would amount to a dramatic shift for Toyota and rewrite the \$38-billion EV rollout plan the Japanese automaker announced last year to better compete with Tesla
- A working group within Toyota has been charged with outlining plans by early next year for improvements to its existing EV platform or for a new architecture
- Toyota has suspended work on some of the 30 EV projects announced in December
- would also give Toyota a chance to compete with a more efficient manufacturing process, as industry-wide EV sales run past Toyota's earlier projections.
- review was triggered in part by the realization by some Toyota engineers and executives that Toyota was losing the factory cost war to Tesla on EVs
- Toyota's planning had assumed demand for EVs would not take off for several decades,
- Toyota assumed it would need to sell about 3.5 million EVs a year – roughly one-third of its current global volume – by 2030 to stay competitive -
- But sales of EVs are growing faster. Automakers globally now forecast plans for EVs to represent more than half of total vehicle production by 2030, part of a wave of industry-wide investment that now totals \$1.2 trillion.
- The recognition within Toyota, the world's biggest automaker, that Tesla has set a new benchmark for EV manufacturing costs marks a major reversal.
- when Toyota took a stake in Tesla and the two collaborated to produce a battery-electric version of the RAV4, many Toyota engineers believed Tesla's technology was no threat

### **THIS ARTICLE IS JUST A CONTINUATION OF THE ABOVE INFO**

#### **Toyota's new, new EV plan suggests smarter driving**

[https://www.reuters.com/breakingviews/toyotas-new-new-ev-plan-suggests-smarter-driving-2022-10-25/?utm\\_source=Sailthru&utm\\_medium=newsletter&utm\\_campaign=sustainable-switch&utm\\_term=10-25-2022](https://www.reuters.com/breakingviews/toyotas-new-new-ev-plan-suggests-smarter-driving-2022-10-25/?utm_source=Sailthru&utm_medium=newsletter&utm_campaign=sustainable-switch&utm_term=10-25-2022)

- Toyota Motor may be driving towards its third electric-car reboot in just 13 months

## BATTERIES, GIGAFACTORY, ENERGY STORAGE

### **Hyundai breaks ground on \$5.5 bln U.S. EV, battery plant**

<https://www.reuters.com/business/autos-transportation/hyundai-launch-55-bln-us-ev-plant-new-law-dims-sales-outlook-2022-10-25/>

- Hyundai Motor Co (005380.KS) broke ground on a \$5.54 billion electric vehicle (EV) and battery plant in the United States on Tuesday
- The investment is the largest in the state's history and the latest in a string of EV and battery announcements in Georgia.
- plans to begin commercial production in the first half of 2025 in the massive plant in Bryan county about 30 miles west of Savannah, that will have an annual capacity of 300,000 units.
- will eventually add 8,100 jobs
- since 2020 Georgia has announced 30 electric mobility-related projects that will ultimately result in \$13 billion in investment and nearly 19,000 jobs.
- comes amid anger from Korea and the European Union over U.S. tax policy on electric vehicles
- Hyundai and its affiliate Kia Corp as well as major European automakers were excluded from the EV subsidies as they do not yet make the vehicles there.
- Sales of the Hyundai Ioniq 5 crossover SUV in the United States slumped around 14% in September from the previous month, hit by the new U.S. law.

## SUPERCHARGERS (report for 1st show of the month, template below)

### Supercharger Update - RR (in progress)

- Thank you to **supercharge.info**
- Since our last Tesla focused show, **28** - days ago on 9/1/2022
- Supercharger activity includes:

<b>Open</b>	<b>114</b>
<b>Construction</b>	<b>56</b>
<b>Permit</b>	<b>59</b>

	<u>Today</u>	<u>Last Shows</u>
<b>Tesla: Stations:</b>	<b>4346</b>	(4044)
<b>Stalls:</b>	<b>39299</b>	(37445)

**Electrify America:** *(funded by Volkswagen's penalty money)*

<b>Stations:</b>	<b>791</b>	(788)
<b>Stalls - CCS:</b>	<b>2665</b>	(2647)
<b>Stalls-CCS-CHAdeMO:</b>	<b>770</b>	(768)
<b>Total:</b>	<b>3435</b>	(3415), up 20 😊

**EVgo:**

**Total: 927 (>850),**  
plan to add >2,700 EV charging plugs over 5-years through a partnership with General Motors.

## SPACE-X & AEROSPACE

### Falcon Heavy | USSF-44

Mon Oct 31, 2022 6:44 AM PDT

LC-39A, Kennedy Space Center, Florida, USA

- They are gonna try and land two of the boosters back on land. Which is always cool.

### Falcon 9 Block 5 | Hotbird 13G

NET Nov 03, 2022

SLC-40, Cape Canaveral SFS, Florida, USA

### SLS Block 1 | Artemis I

Sun Nov 13, 2022 9:07 PM PST

LC-39B, Kennedy Space Center, Florida, USA

- **Mel** - House of Dragons - HBO Max
- **Robert** - Midnights by Taylor Swift - Album
- **Tom** - A trip to Infinity - Netflix
- **Joel** - "Nope" Amazon Prime -