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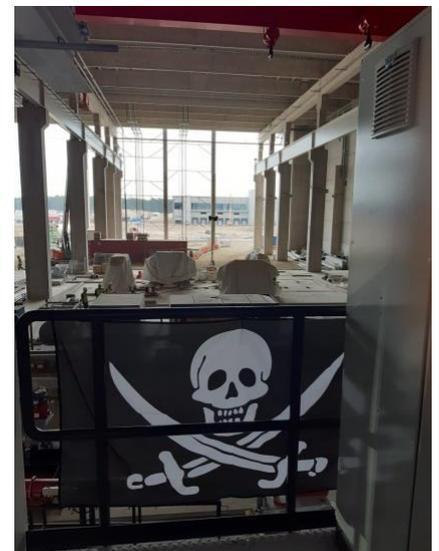
Tesla Giga Berlin Production Start Planned Early November 2021 Two Different Model Y Versions And Production Lines Are Prepared

Exclusive leaked information and details about the Made in Germany Model Y versions, castings, cells, and production start timing.

Early in November 2021, Tesla plans to start the production of the Model Y in the Gigafactory Berlin a credible source informed me about this week. In the remaining 20 weeks, Tesla looks forward to finishing all required construction works and receiving the final official construction permit. This is about the production ramp and start of mass manufacturing and not machining or serial production testing. Two months will therefore be left in 2021 for Tesla to produce and deliver the first Made in Germany Model Ys. The statement from Elon Musk that first deliveries will happen late in the year is consistent with what my source informed me about.

It's been leaked to me with detail that Tesla is preparing for two different Model Y production versions on two separate production lines in Giga Berlin. This is very likely designed to mitigate mass manufacturing risks. One version and line will include the new 4680 battery cell format with front and rear die casting parts and the other the 2170 cells that are already used in Fremont and Shanghai with only the rear casting. The line with the old cells is a backup line. Because of different cells and construction, it can be speculated that the vehicle performance of both Model Y versions will differ.

According to other internal employees from Tesla they can manufacture the Model Y with high throughput using the 2170 cells, the legacy chassis and rear die casting with front stamped parts. This version is called "Legacy" within Tesla and has a rear casting part but the front is built with parts from normal presses like they are used



already in Fremont and Shanghai. The other and new Model Y version is called “SP” with the objective to produce vehicles with front and rear die castings using 4680 cells in the structural battery pack.

As this is a brand new process that may encounter several not yet visible challenges in mass production it makes a lot of sense for risk mitigation to have 2 lines with different cell formats and production techniques established. In the case that “SP” causes delays Tesla can easily produce and deliver “Legacy” Model Ys from Berlin with low costs and reduced risks.

First rear and front casting parts have already been produced in Giga Berlin too and currently are used for testing of the manufacturing process. The IDRA casting machine works with aluminum sourced from Russia (see picture) the source informed. The structural battery pack and the front and rear castings are not yet aligning well enough for “SP” to work well and more detailed works need to happen for that production step to be perfect. This is a normal and not unusual alignment process given the amazing innovation resulting in time, complexity, and cost reduction the large casting parts will bring to mass manufacturing.

It's been widely misunderstood by the public how far Tesla is already ahead in its factory construction. Minister Steinbach made such a statement lately and understanding that Tesla is already in the fine-tuning machining process internally is a strong signal that a production start early in November is indeed realistic.

