



RENEWABLES & ENERGY INFRASTRUCTURE

# Renewables & Energy Infrastructure Division Overview, Strategy, and Supplier Needs

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Supplier Summit

December 2024

**JABIL**

# Topics

- R&EI Division Overview and Strategy
- R&EI Mechanical Sourcing Needs
- Market Sector Adjacencies
- Q & A



# Topics

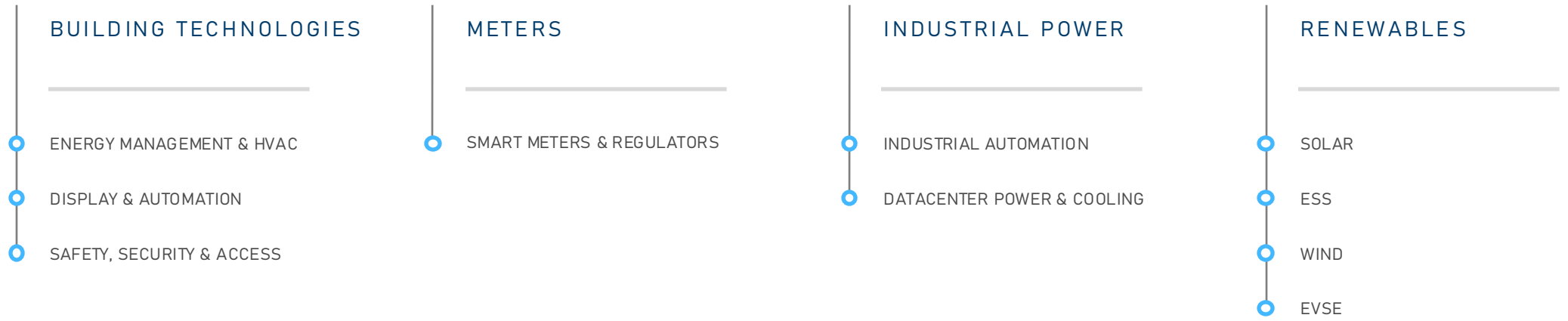
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# Jabil's Organizational Structure

## Brent Tompkins, SVP, Renewables & Energy Infrastructure



### FUNCTIONAL AREAS



# Jabil Renewables Solutions – Powering Tomorrow

## ENERGY MANAGEMENT

Grid Balance & Stability

## SOLAR

Inverters & Balance-of-Solution Components

## WIND

Nacelle Control Systems & Converters

## ENERGY STORAGE

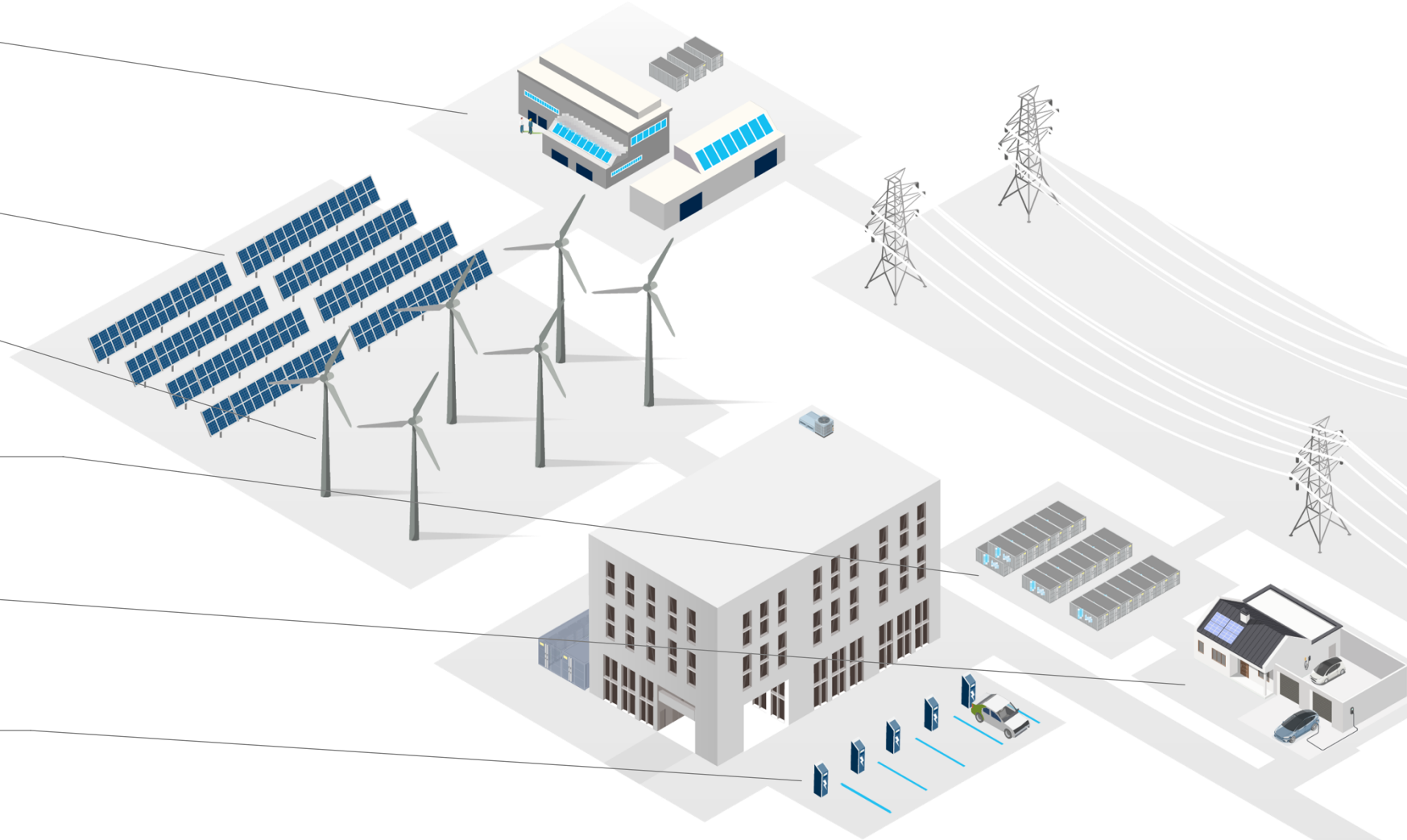
Commercial & Grid Scale Systems

## RESIDENTIAL

Inverters, Energy Storage Systems, and Metering

## EV FAST CHARGING

Level 3 - DCFC



# Building Technologies Solutions – Powering Tomorrow



# Customer Needs for R&EI



## COST INNOVATION

Lowest Landed Cost



## CREATIVE SUPPLY CHAIN SOLUTIONS

- Lead Time Reduction
- Inventory Optimization
- Resiliency
- Flexibility



## LOCALIZED SUPPLY

- IRA Incentives
- Lower Carbon Footprint



## QUALITY



## ON-TIME DELIVERY



## SERVICE

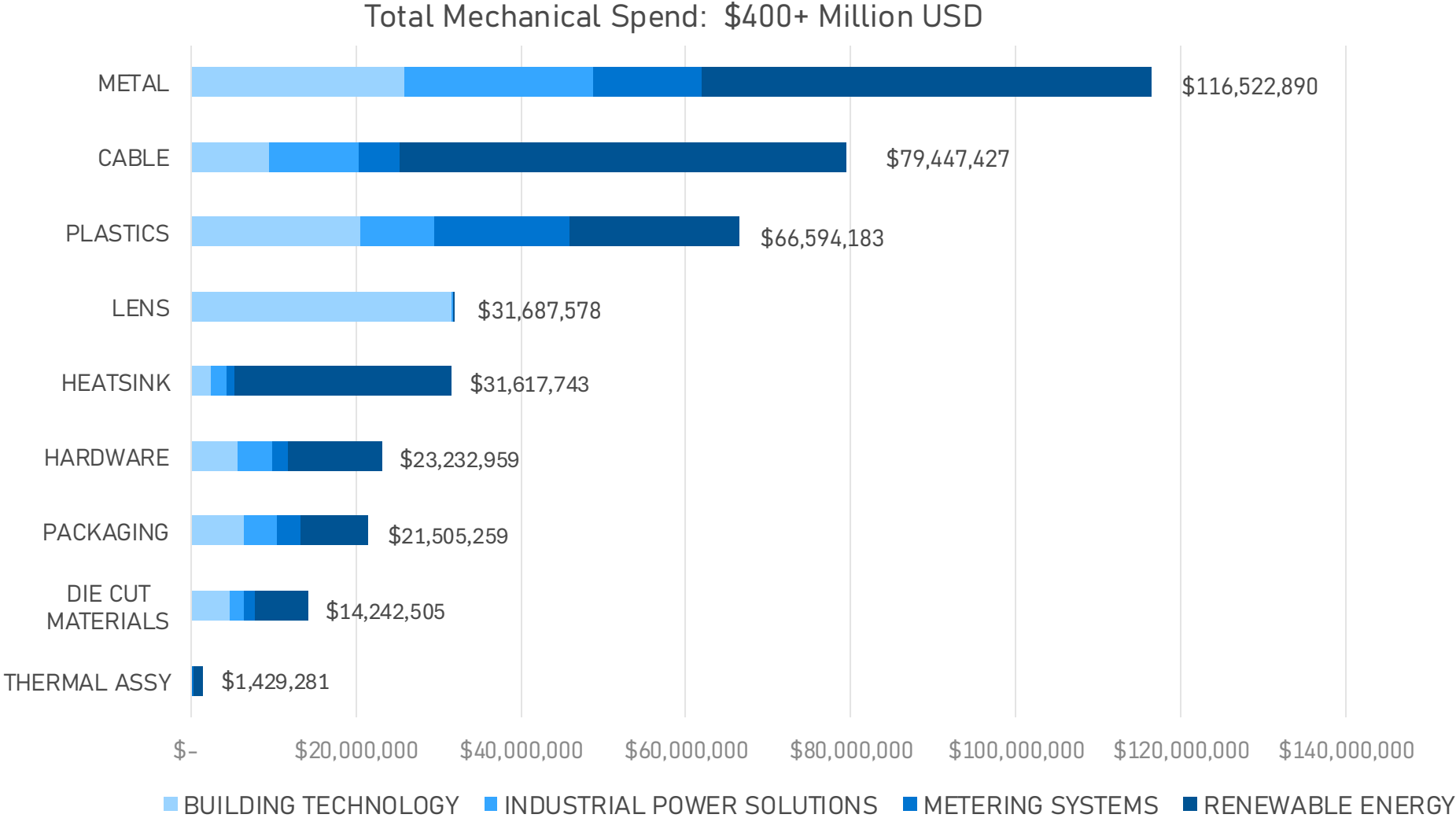
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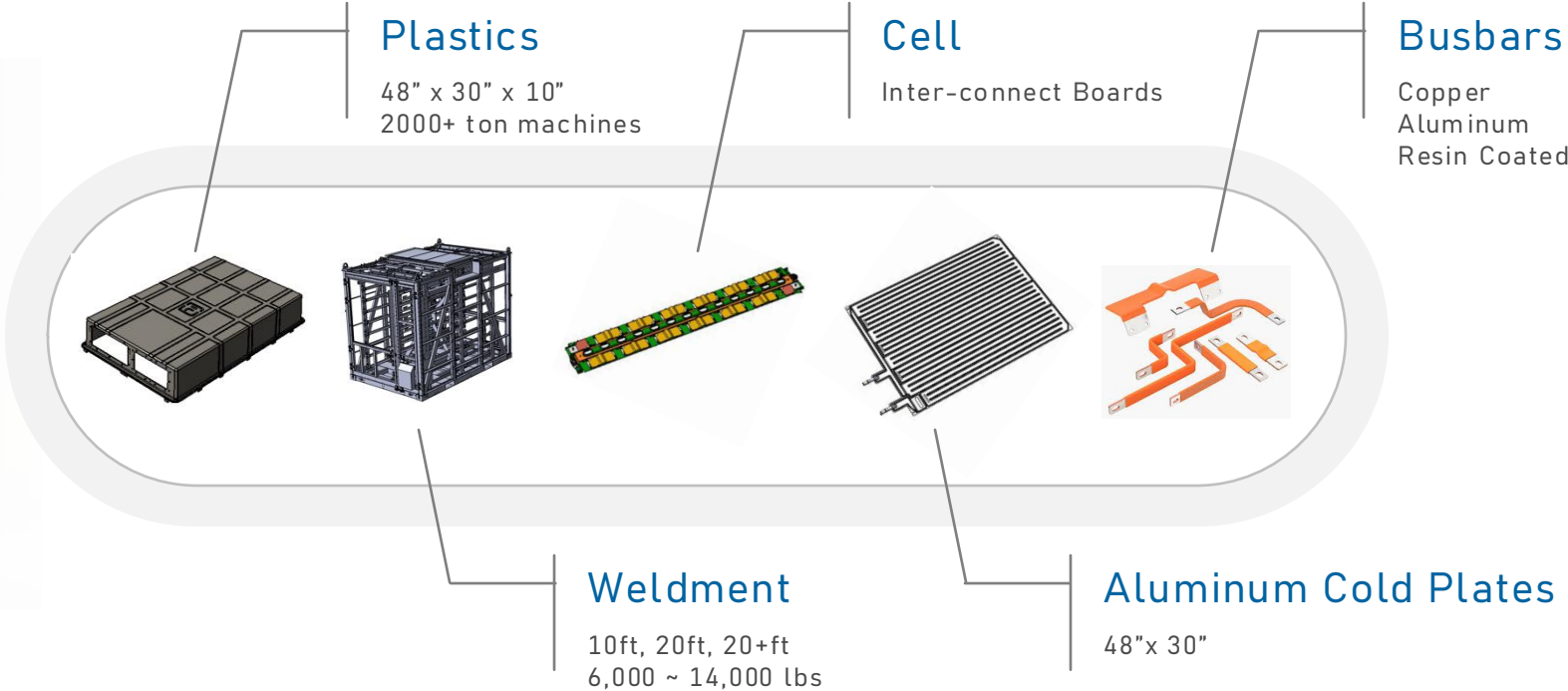




# Renewable & Energy Infrastructure Mechanical Spend



# Grid Scale Energy Storage / Battery Modules



INDUSTRY CAGR:

**20%**

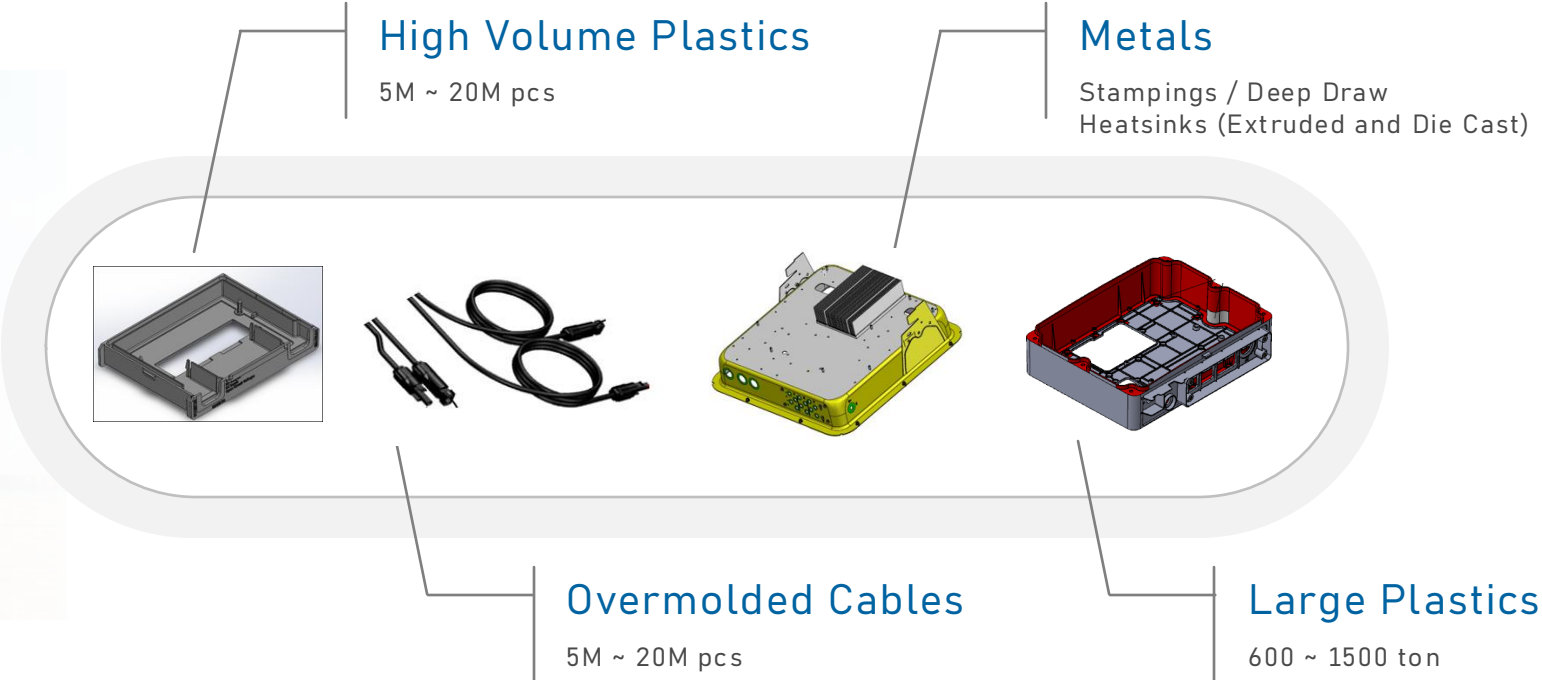
**CHALLENGES:**

- Vast majority of Turn-key suppliers are in China
- High logistics cost of moving from Asia to USA
- Tariffs / Political Uncertainty

**NEEDS:**

- Lowest Landed Cost Sources to support Regional Markets
  - Large Plastics and Cold Plates, Weldments, Busbars
- More Competitive pricing through Tooling and Automation
- Multi sources for complete Inter-connect Boards Assy.

# Solar Inverters



INDUSTRY CAGR:

**10%**

**CHALLENGES:**

- Meeting Government Incentive Requirements (IRA / BAA)
- Inconsistent logistics cost of moving from Asia to USA
- Tariffs / Political Uncertainty

**NEEDS:**

- Lowest Landed Cost Sources to support Regional Markets
  - Large Plastics, Complex Metals, Overmolded Cable
- Competitive pricing achieved through Tooling and Automation

# HVAC Products



## Cable Assemblies

Complex Harness  
75+ per unit



## Fans / Motors

Custom Designs  
Reverse Engineering



## Metals

Large Bed Size 9+ft  
In-house painting

INDUSTRY CAGR:

# 6.7%

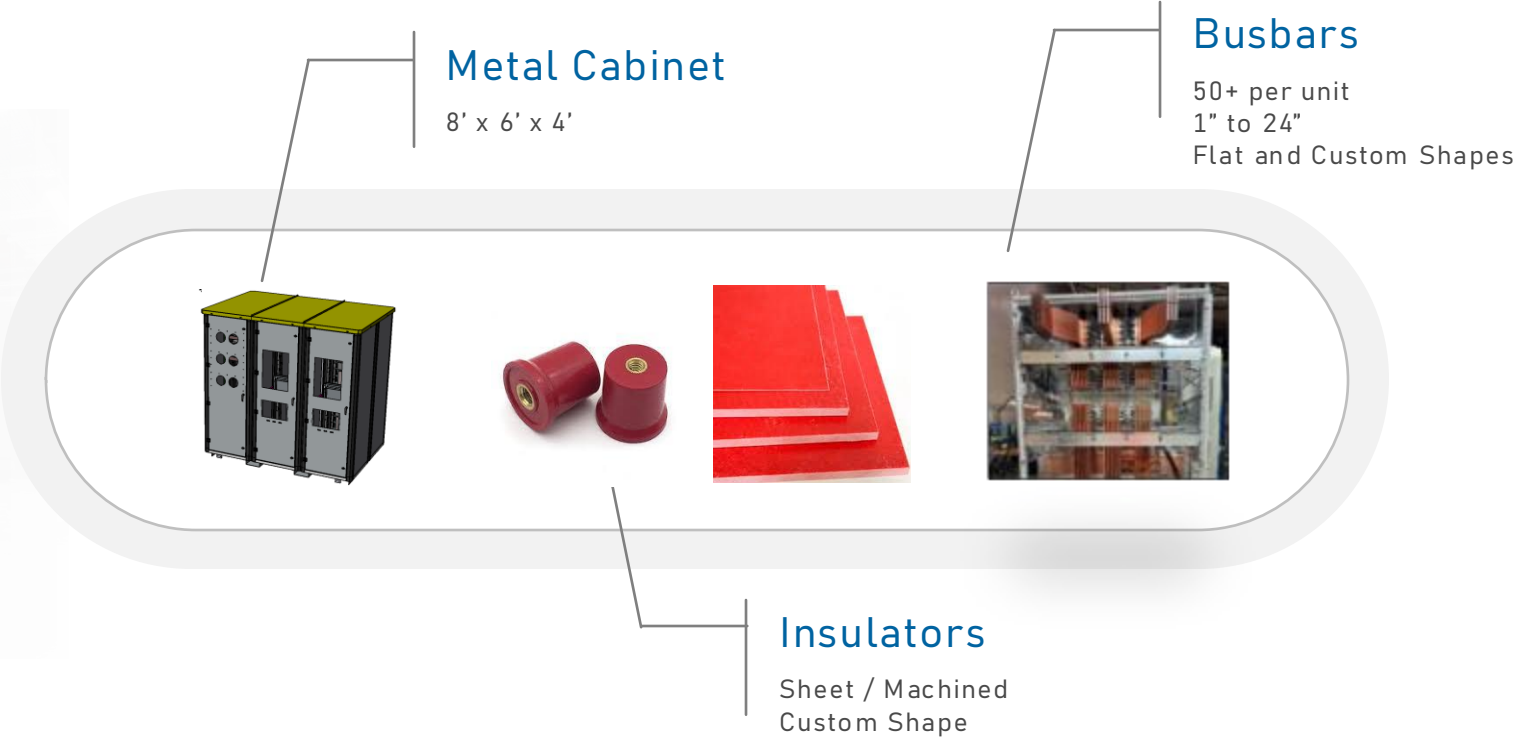
### CHALLENGES:

- Competitive Pricing (Metals, Cables)
- Cable Assy requiring advanced DFM Support
- Fluctuations in quarterly volumes

### NEEDS:

- Complex Cable Assemblies in Mexico
  - Reverse Engineer from Specs and Samples
- Lower costs through Automation and Tooling
- Ability to receive transfer tooling from
- Flexibility to support demand fluctuations

# Low Voltage Switch Gear



INDUSTRY CAGR:

**4.2%**

**CHALLENGES:**

- Competitive Pricing
- Volume fluctuations

**NEEDS:**

- Lowest Landed Cost Sources to support Regional Markets
  - Large Cabinets, Busbars, Machined Insulator
- Competitive pricing thru Tooling, Automation, etc.
- Flexibility to support demand fluctuations

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# Market Sector Adjacencies

## Retail & Warehouse Automation, Cloud & Data Centers – Driving Emerging Needs

- Large & heavy metal fabrication and weldments
- Aluminum Extrusion
- Complex, large cable harnesses
- Complex Metal & Plastic Machining
- Plastic Injection Molding (high tonnage)
- Machined Shafts, Bushings
- Gears and Sleeves, Belt Assy
- Mechanical Sub-ASM Outsourcing

# Supplier Success Elements

## Customers & Jabil Committed to Regional Growth



### Capacity Investment

Metal finishing, paint & powder coating  
Large tonnage Metal Stamping



### Quality System Investment

Driving to highest quality standards, process controls, preventive maintenance, records control, rapid response on corrective actions and tool repair



### NPI & Engineering Support

DFM Support and documentation updates  
FAI & Part Qualification resource capacity



### Demand / Manufacturing Flexibility

Ability to ramp up and down in line with demand peaks and troughs



### Inventory & Freight Optimization

Supplier Pull systems, Kanban Support,  
Packaging design support



### Eco-System Partnership

Engagement in potential supplier and Jabil partnership opportunities to build long term competitive and sustainable supply chain



# Mechanical Commodity Management

## Global & Regional Resources

### MARKET SECTOR STRATEGIC LEADER(S)



**Bob Nazarowski**  
RENEWABLES & ENERGY  
INFRASTRUCTURE



**Mike Ashley**  
RETAIL & WAREHOUSE  
AUTOMATION



**Marty Elnicki**  
CLOUD & DATA  
INFRASTRUCTURE

## Americas Commodity Management

Mike Walker



### MEXICO SUPPORT

DIRECTOR, SUPPLY CHAIN  
Shiara Chavez



PLASTICS  
Gregorio Santillan

METALS  
Gamaliel Soto

PACKAGING/HWD  
Alejandro Malacón

CABLE ASSEMBLY  
Salvador Cisneros  
Brano Andric

## Global Commodity Management

Andy VanPutte



### METALS+

Michael Figueroa



VERTICAL/JIS, CASTING,  
HARDWARE  
Anny Yao

EXTRUSION, MACHINING,  
HEAT SINKS, THERMAL ASSY  
Ting Hsieh

RAW MATERIALS, STAMPING,  
FORGING, FABRICATION  
Alison Jiang

### RPP+

Jasmine Cheng



PACKAGING (PULP/PAPER)  
Jorge Garcia

PLASTICS, KEYPADS, PLUMBING  
Hector Maldonado

# Strengthening Our Partnership

Collaborating to Meet Customer Needs and Drive Innovation

By addressing our customers' needs for cost innovation, creative supply chain solutions, and localized supply, we can enhance our offerings and drive customer success.



# Thank You

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# Q & A

**JABIL**