Twitter Thread by Sam Korus

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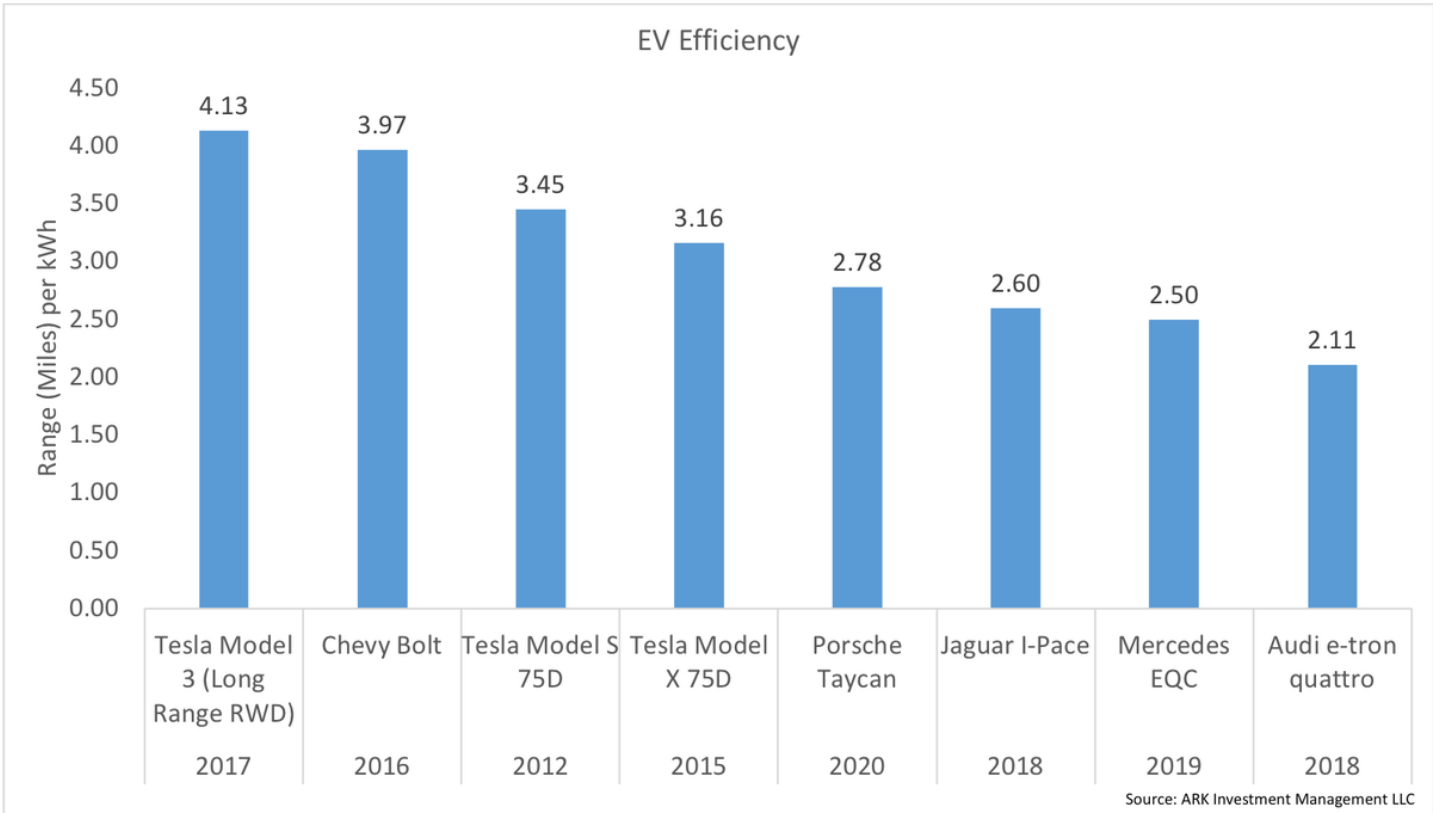
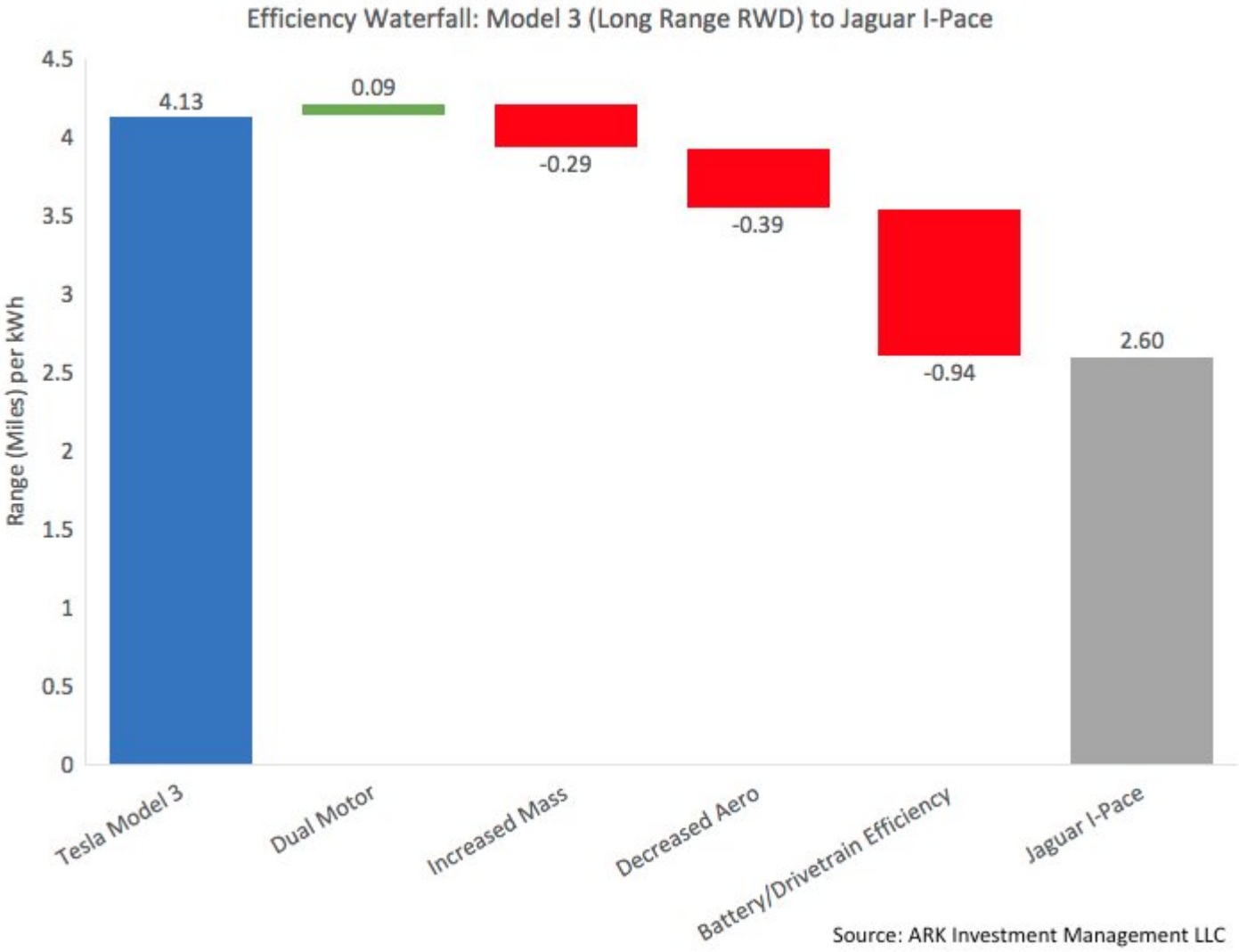
1/ The #Tesla Model 3 is one of the most efficient #EV on a range/kWh basis, followed closely by the Bolt. Meanwhile the "Tesla Killers" lag significantly.

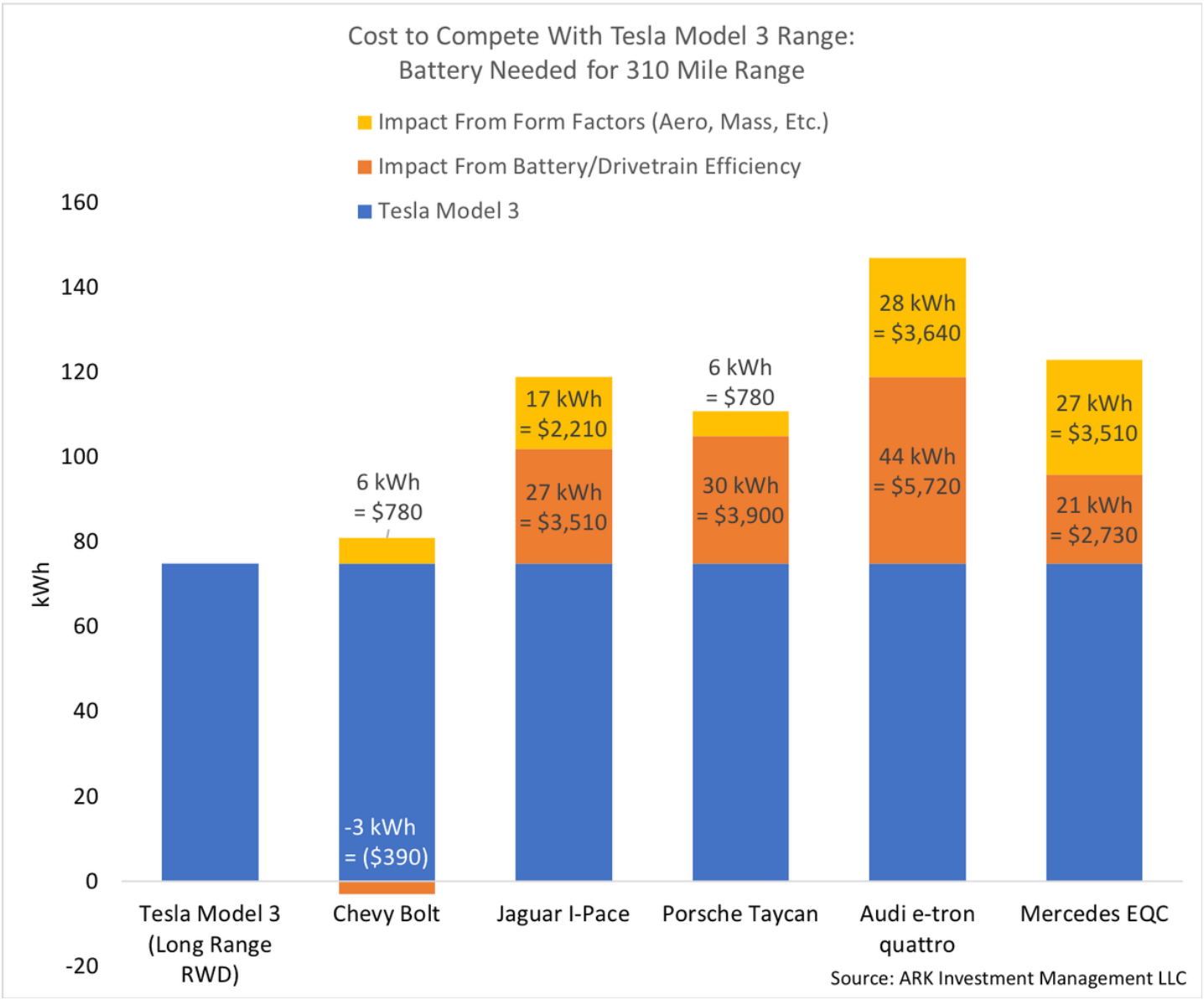


2/ "But they're different types of cars so they aren't comparable!" That's why we put them into our physics based model that simulates EPA range to separate out form factor from battery/drivetrain efficiency.

3/ Even accounting for the fact that the Jaguar iPace is an SUV, it's far less efficient than the Model 3.



4/ Which means Tesla should be able produce a car of a given range (or at least the drivetrain) for cheaper than its competitors. (This doesn't even take into account that Tesla is likely making batteries for less than its competitors).



5/ Why is the Bolt so efficient? Perhaps it sacrifices performance to achieve it. Either way the “Tesla Killers” look like they’re throwing everything out the window to try & match Tesla performance.

6/ These efficiency differences are particularly relevant for a lower priced mass market EV. It could be the difference between executing w/ a healthy margin & never trying b/c the economics won’t work.