

## ContainerPower Energy Solutions

# U S rechargeable energy storage battery exports



## Overview

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What are the tariffs affecting battery energy storage?

The tariffs affect a range of clean energy imports including EVs, solar PV, battery energy storage, and inputs for these. This briefing focuses on the tariffs affecting battery energy storage. Policy changes affecting the solar portion of the Section 301 tariffs are addressed in a separate briefing.

How will the Section 301 tariffs affect battery energy storage?

On May 14, 2024, U.S. President Biden and U.S. Trade Representative Katherine Tai announced changes to the Section 301 tariffs on Chinese products. The tariffs affect a range of clean energy imports including EVs, solar PV, battery energy storage, and inputs for these. This briefing focuses on the tariffs affecting battery energy storage.

Which country imports the most lithium batteries in the world?

China dominates the global lithium battery supply chain, producing over 75% of the world's lithium-ion battery cells. The U.S. imports nearly 70% of its lithium batteries from China, making tariffs on these products highly impactful. The U.S. aims to build a resilient domestic battery industry to support its clean energy goals.

Are Chinese tariffs affecting battery energy storage systems?

If you're in the business of battery energy storage systems (BESS), you've probably felt the squeeze of tariffs on Chinese imports. For years, China has been a go-to for affordable, high-capacity energy storage solutions, but ongoing trade policies and tariffs have made importing these systems into the U.S. more complicated — and expensive.

How does uncertainty affect a stationary battery energy storage project?

While existing inventories will allow project development to move forward in the short term, uncertainty extends across the supply chain, including to

prospective manufacturers. Tariff chaos reigns supreme in the development of the US stationary battery energy storage industry.

How will US tariffs affect Chinese lithium batteries in 2025?

U.S. tariffs on Chinese lithium batteries have become a critical factor shaping the global battery market in 2025. These tariffs directly impact lithium-ion batteries' cost, supply chain, and competitiveness, essential for electric vehicles (EVs), renewable energy storage, and consumer electronics.

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