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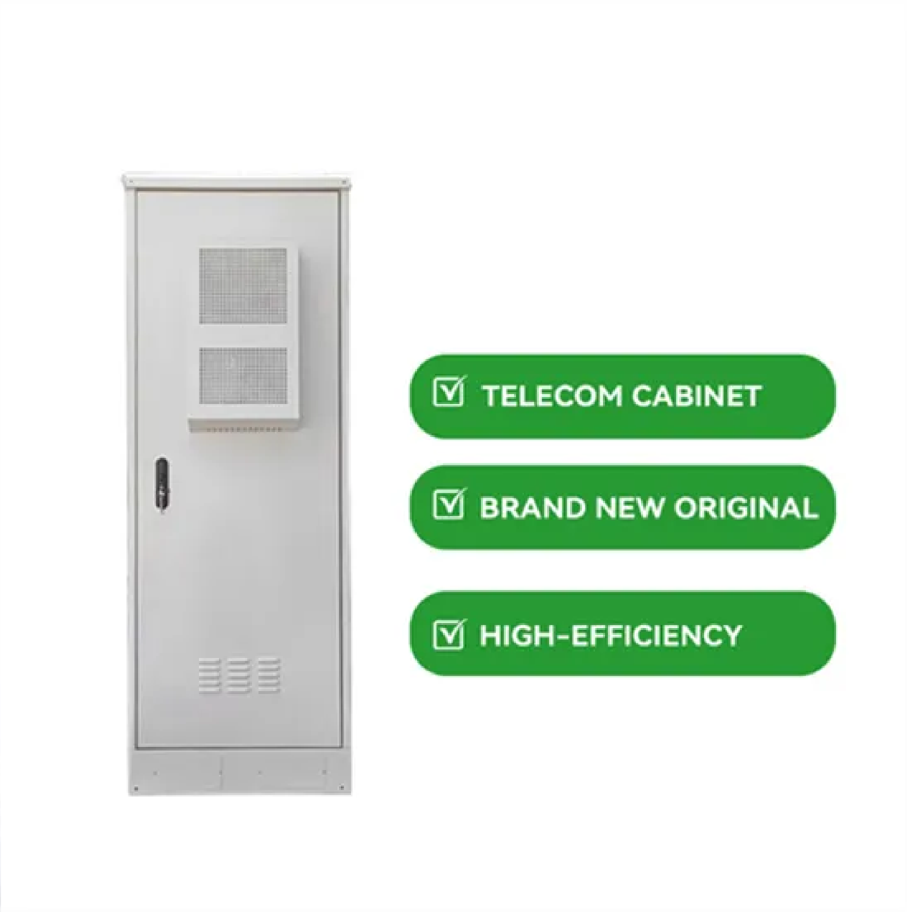
US home rooftop power station energy storage lithium battery foreign trade



Overview

How will tariff chaos affect the stationary battery energy storage industry?

Tariff chaos reigns supreme in the development of the US stationary battery energy storage industry. Facing extraordinary tariffs of 145% on BESS imports into the country, developers will have to rely on inventory to realize projects. When these stockpiles are exhausted the outlook is unclear. Even the 145% tariff rate is uncertain.

What are China's new tariffs on lithium-ion batteries?

On May 14, 2024, the Biden Administration announced changes to section 301 tariffs on Chinese products. For energy storage, Chinese lithium-ion batteries for non-EV applications from 7.5% to 25%, more than tripling the tariff rate. This increase goes into effect in 2026. There is also a general 3.4% tariff applied lithium-ion battery imports.

Is China still a supplier of lithium battery cells?

China remains a primary supplier of lithium battery cells for the U.S. market. In December 2024, lithium battery imports from China exceeded $1.9 billion, according to U.S. trade records. However, changes under the 2025 tariff framework have added new barriers to this trade.

Is lithium iron phosphate a future for battery manufacturing?

Multiple companies have announced investments in domestic battery plants, including plans to manufacture lithium iron phosphate (LFP) and nickel-based chemistries. However, as of 2025, most announced projects remain in early development or construction stages. 2. Current Limitations in Expanding U.S. Battery Manufacturing.

Are ESS battery imports based on residential & nonresidential installations?

These data are based on companies supplying systems for residential installations, though they also include some batteries for nonresidential installations as some companies supply both market segments. The data are only for battery imports that could be specifically identified as being used in domestic ESS assembly.

Are US battery producers worried about tariffs?

However, several U.S. battery producers have voiced concern over the tariffs. The San Francisco-based lithium-sulphur battery producer Lyten sources over 80 percent of its core components domestically, meaning that it does not have to be worried about the rising cost of imported components.

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