

Battery Energy Storage Trade & Supply Chain Landscape

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Big Themes/Patterns in US Trade Policy

- Increased use of discretionary trade remedies
- Continued heavy usage of legal/bureaucratic trade remedies
- No trade liberalization
- “Worker-centered” and “policy space”
- De-Sinification
- Some efforts to align trade policy with energy transition goals



What You Get When Locating Mfg in the US

Pluses

- Rule of Law
- Workforce
- **Access to mfg Incentives**
- **Qualify for local content**

Minuses

- Cost penalty
- **Uncertainty around mfg incentives**
- **Possible problems importing inputs**



Categories of US Trade Remedies

Legal/Bureaucratic

- AD-CVD
- Section 337

Political/Discretionary

- Section 301
- Section 232
- Section 201



Potential Sources of Trade Friction for Stationary Storage Products

- IP theft or infringement
- Over-capacity
- Dumping
- US industry seeking protection from fairly-traded imports
- Broader country-specific (geo-political) friction

