



# Lead-acid battery energy storage foreign trade orders





## Overview

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In 2025, a new wave of trade measures has reshaped the landscape for U.S. industries dependent on global supply chains. Among the sectors most affected are energy storage, electric vehicles, and electronics—all of which rely heavily on imported components and materials. Recent and expanded tariffs.

New analysis from Clean Energy Associates (CEA) and Wood Mackenzie highlights the challenges facing the US battery storage market due to trade tariffs. According to research firm Wood Mackenzie's new report, 'All aboard the tariff coaster: implications for the US power industry,' tariffs on imports.

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.

The impact of Sino-US tariff policies on the lead-acid battery industry is mainly reflected in three aspects: raw material price fluctuations, market sentiment transmission and indirect pressure on the industrial chain: The reciprocal tariff policy has triggered a rise in market risk aversion.

The Battery Energy Storage System (BESS) market has experienced significant growth in recent years, driven by the increasing adoption of renewable energy and grid modernization efforts. However, the Trump administration's tariffs on imported lithium-ion batteries and related components—initially.

The Trump administration's China tariffs have piled atop existing and developing trade barriers on battery energy storage systems, components, and materials – destabilizing the U.S. energy storage industry. While existing inventories will allow



project development to move forward in the short term. Are lead-acid batteries impacted by tariffs?

The Sino-US trade war As a traditional technology route, lead-acid batteries have a relatively stable global trade pattern and are not as directly impacted by tariffs as energy storage batteries (such as lithium batteries).

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 are battery tariffs reshaping global trade?

As new battery tariffs and expanded China tariffs continue to reshape global trade, U.S. policymakers and businesses are reevaluating the domestic battery supply chain. This section outlines the current status of U.S. battery production, the resources required to scale it, and the challenges involved in reducing reliance on overseas suppliers.

How does Sino-US tariff policy affect the lead-acid battery industry?

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Explore how 2025 battery tariffs affect U.S. imports, energy storage, EV production, and sourcing strategies amid rising China tariffs and trade shifts.



### **Trump tariffs, orders rein in thriving battery storage sector**

Tariffs and funding overhauls by the Trump administration are set to raise energy storage prices and hit short term deployment as domestic manufacturing capacity falls short.



### [The impact of Sino-US tariffs on lead-acid batteries](#)

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### **Trump Tariffs Impact on Battery Energy Storage System Market**

These tariffs, aimed at protecting domestic manufacturing, have disrupted supply chains, increased costs, and reshaped competitive dynamics. This article explores the effects ...



### **Tariffs: Analysis spells out extent of challenge for US BESS ...**



New analysis from Clean Energy Associates (CEA) and Wood Mackenzie highlights the challenges facing the US battery storage market due to trade tariffs.



### [Tariffs: Analysis spells out extent of challenge for ...](#)

New analysis from Clean Energy Associates (CEA) and Wood Mackenzie highlights the challenges facing the US battery storage market ...



### [CEA Update on U.S. Battery Policy Developments](#)

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.



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These components are typically sourced from international suppliers (with China being responsible for around 85% of global battery cell production capacity), which exposes ...



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### **Tariff Volatility Reshapes Battery Storage Landscape: CEA's ...**

A mid-quarter update from Clean Energy Associates (CEA) reveals how recent shifts in U.S. trade policy are significantly altering the economics of battery energy storage ...

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