Chinese AAM imports into the US face 160% tariff following antidumping investigation ruling

18th July 2025

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Anode Batteries Graphite

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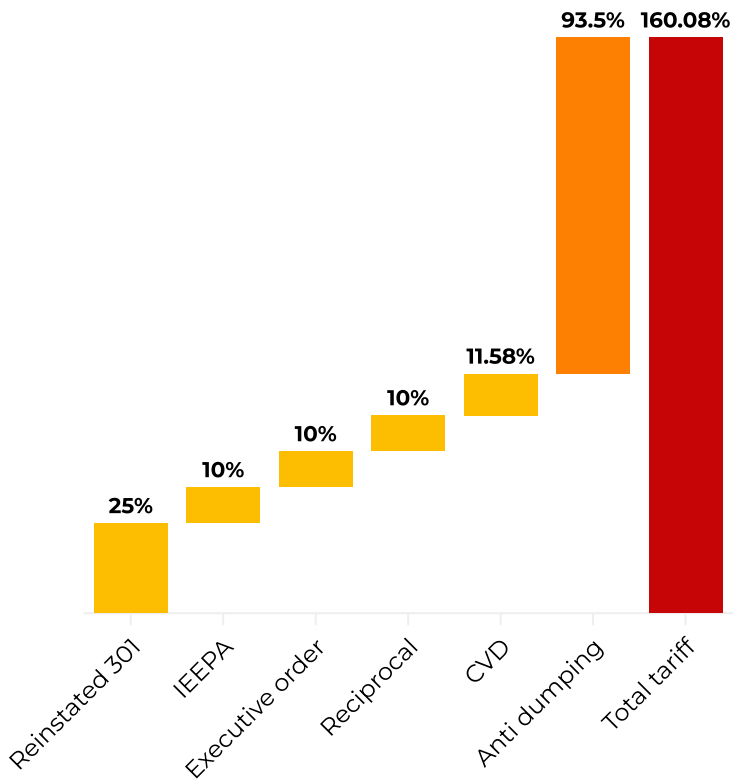
On 17thJuly, the US Department of Commerce (DOC) issued a preliminary determination that China is dumping graphite anode active material (AAM) into

the US market, resulting in an antidumping (AD) tariff of 93.5% for the majority of Chinese AAM imports, including material contained in lithium ion batteries.

This anti-dumping duty comes on top of the raft of other tariff measures already implemented against imports of Chinese AAM. Combined, these tariffs total 160% for most Chinese AAM imported into the US.

Antidumping tariffs bring the total tariff on most Chinese AAM imports to 160%

Tariffs imposed on Chinese AAM imports into the US



Source: Benchmark Anode Forecast • Kaijin, which did not cooperate with the CVD investigation, faces a CVD tariff of 721% bringing its total tariff to 869.5%

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How do the tariffs impact AAM and cell costs?

The cost of Chinese AAM jumps from ~$3,700/tonne to $9,300/tonne, once tariff measures are applied. By comparison, US-made AAM costs around ~$5,400/t, making domestic material over 40% cheaper.

This marks an advantage for US anode aspirants looking to onshore production as they are likely to see greater interest from investors and cell makers, given the more balanced cost landscape. However, given the current limited availability of commercial-scale domestic AAM, cell makers will likely absorb these higher associated costs in the near term, which could dampen demand.

US-made anode active material 42% cheaper than imported Chinese AAM after tariffs

Cost of Chinese-made synthetic graphite AAM imported in the US compared to cost of US-made AAM (USD/tonne)

Source: Benchmark Synthetic Graphite Forecast

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How much Chinese AAM does the US import?

From January 2022 to December 2024, direct Chinese exports to the USA averaged ~2,500 tonnes per month (tpm) of coated spherical purified graphite (CSPG) and ~5,800 tpm of synthetic graphite (Note: some material within the HS code may fall outside ery markets).

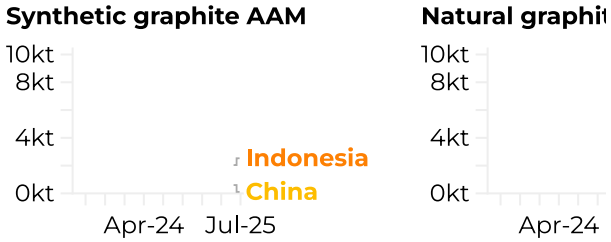
In 2025, average export volumes fell sharply to ~1,400 tpm for CSPG and 4,421 tpm for synthetic graphite. May CSPG exports dropped to 0 and synthetic graphite to 600 tonnes, roughly 1% of China's global synthetic export share.

Meanwhile, Indonesia's AAM exports to the US, which were previously non-existent, now average above 1,000 tpm, driven by BTR shifting exports from China to its Indonesian plant. BTR plans to double that plant's capacity to 160 ktpa by the end of the year to serve South Korean, US and European buyers.

This trend of Chinese overseas expansion is likely to continue as companies seek ways to circumvent trade restrictions targeting China. However, governments are increasingly closing loopholes, such as the DOC determining that BTR and CATL could not prove independence from the Chinese Communist Party.

Chinese AAM imports to the US have plummeted in recent months

BTR has shifted to export material to the US from Indonesia instead of China in response



Source: Global Trade Tracker • HS Codes: 3801110 (artificial graphite) and 380190 (surface treated spheroidized graphite)

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Who will be impacted by this?

The new duties also cover AAM contained in imported battery cells. Whilst the share of Chinese cells used in US EVs has fallen notably in recent years, due to earlier tariffs and Inflation Reduction Act (IRA) incentives, limiting the direct impact on the EV sector, the US BESS market remains heavily reliant on Chinese cells—over 90% of which is still sourced from China.

The exclusion of finalised downstream products (e.g. BESS containers) from the scope of the tariff, means this ruling will disproportionately impact domestic system manufacturers, who will face the tariff on their battery imports, compared to Chinese system manufacturers who export finished systems.

A final ruling is due on 5thDecember, which may adjust the rates. Until then, US Customs and Border Protection will collect deposits at the preliminary dumping rates.

Who is impacted by these tariffs?

Anode producer	AD Tariff	Key customers
BTR New Material Group	93.5%	Tesla, Panasonic, SK On, Samsung SDI
Shijiazhuang Shangtai Technology	93.5%	Tesla
Guangdong Kaijin New Energy Technology	93.5%	Tesla, Panasonic
XFH (Xiangfenghua)	93.5%	Tesla
Resonac Holdings	93.5%	Panasonic
Zhejiang Tanyi (Carbon One)	93.5%	Samsung SDI
Shanghai Putailai New Energy Technology	93.5%	Samsung SDI
Ningbo Shanshan	93.5%	
Hunan Zhongke Electric (Shinzoom)	93.5%	
Others	102.72%	

Source: US Department of Commerce

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