MARCH 2026

Energy Storage Powers American Manufacturing

Milestone Report on the Energy Storage Industry's $100 Billion Commitment to Build American Factories and Buy American-Made Grid Batteries

The U.S. Energy Storage Coalition unites America's leading grid battery manufacturers, energy storage developers, owners, and operators. The Coalition advances policies and solutions to ensure grid reliability amidst historic demand for power, lower energy costs for all Americans, strengthen grid capacity to support new industrial and AI infrastructure, and rapidly scale American manufacturing and minerals production.

ENERGY STORAGE COALITION

Photo credit: Tesla

Energy Storage is Powering American Manufacturing and Driving Investment in Critical Minerals

Energy storage is rapidly becoming one of the most powerful engines of American industrial growth.

In 2025, for the first time, energy storage systems (ESS) emerged as the leading driver of battery supply chain investments, surpassing the automotive manufacturing industry.

Across battery systems, cells, and critical minerals, energy storage is rapidly building a full-stack, end-to-end American supply chain.

This momentum follows the industry's 2025 commitment to invest **$100 billion in American manufacturing and minerals production, which ultimately is expected to generate over 350,000 new jobs**. Energy storage now represents one of the fastest-growing advanced manufacturing sectors in the U.S. economy.

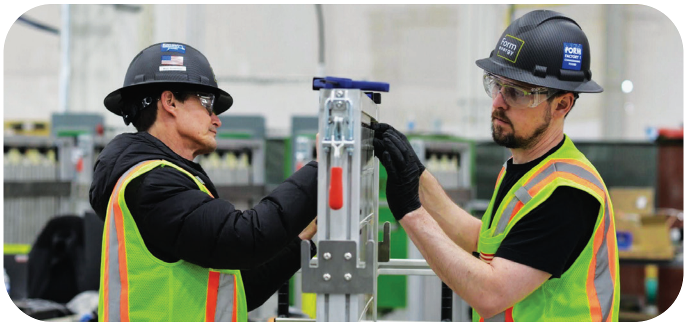


Photo credit: Form Energy

A PROGRESS REPORT on the Energy Storage Industry's $100 Billion Commitment to American Battery Manufacturing

- Industry **exceeds 100% of US demand** for energy storage systems and modules
- By the end of 2026, energy storage battery cell manufacturing **could surpass domestic demand**
- Grid demand for energy storage resources and American-manufactured energy storage systems is **driving significant investment in critical minerals**

ENERGY STORAGE COALITION

Learn more at EnergyStorage.org

American Energy Storage Systems Manufacturing

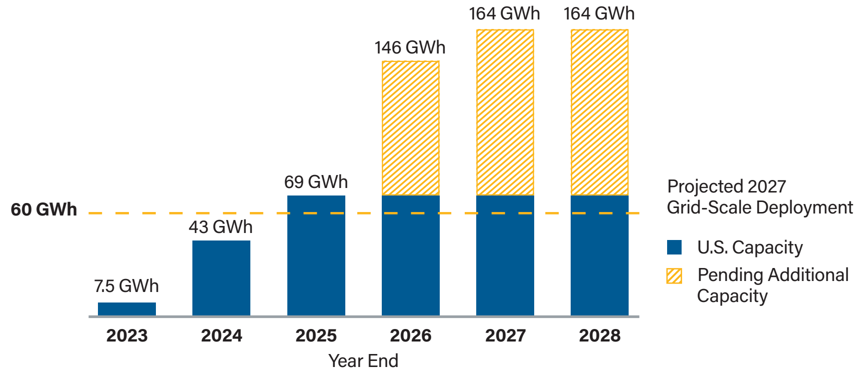
U.S. energy storage module and system manufacturing capacity surpasses 100% of domestic project demand.

Photo credit: Fluence

In 2026, U.S. energy storage **module and system manufacturing capacity is projected to exceed total domestic project demand for the first time**, marking a historic inflection point. U.S. battery module and systems manufacturing is the front line of America's energy storage industrial resurgence. These facilities assemble battery cells into high-performance modules and integrate them into grid-ready energy storage systems that deliver capacity, resilience, and flexibility to the power system. Battery energy storage system manufacturing encompasses power electronics, thermal management, structural steel fabrication, controls hardware, and operating systems. That includes the advanced battery management systems and power conversion equipment such as inverters.

American Energy Storage Systems Manufacturing

American manufacturing of energy storage modules and systems, which includes the fabricated steel enclosures, power controls, inverters, and other equipment has reached a significant milestone. Domestic manufacturing of energy storage systems now surpasses annual energy storage project demand.



Systems, Inverters, & Smart Equipment Manufacturing

FLUENCE SYSTEMS MANUFACTURING

Fluence manufactures cells, modules, and associated equipment at facilities across the U.S., in Utah, Tennessee, Arizona, and Texas employing more than 1,200 people and creating 450 construction jobs. These components are all integrated into American-made energy storage systems.

TESLA SYSTEMS MANUFACTURING

In addition to Tesla's operating 40 GWh Megapack factory in Lathrop, California, the company is set to add an additional 50 GWh of system manufacturing capacity outside of Houston, Texas.

LG ENERGY SOLUTION SYSTEMS MANUFACTURING

LG Energy Solution assembles US-made cells into full energy storage systems at a final assembly facility in Phoenix, AZ. Production is set to expand in 2026 to support LG Energy Solution's around 50 GWh of North American ESS manufacturing.

American **Grid Battery Cell** Manufacturing

U.S. cell manufacturing is on track to supply 100% of domestic project demand in 2027, scaling from zero to nearly 100 GWh in just two years.

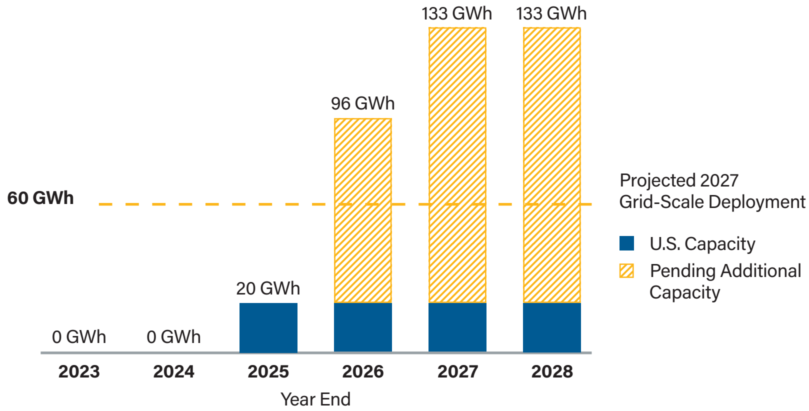
Photo credit: Tesla

Battery cell manufacturing is the industrial heart of the energy storage supply chain—and one of the fastest-growing manufacturing sectors in the United States with cell capacity projected to more than double between 2025 and 2028. The battery cell is the engine of an energy storage system. Thousands of battery cells modules and racks, that are then integrated into the specially engineered energy storage enclosures and systems.

As deployment of energy storage accelerates, U.S. cell factories are scaling rapidly to meet domestic demand. **Cell manufacturing is experiencing a meteoric rise, scaling from near-zero production capacity several years ago to its current trajectory where American manufacturing capacity is on track to rise above domestic energy storage project demand within the next year.** As American factories ramp, they are positioning the U.S. as a global leader in advanced battery manufacturing.

American Energy Storage Battery Cell Manufacturing

Cells, arranged within the module, are the engine of a battery energy storage system. These capital-intensive, state-of-the-art American factories represent cutting-edge advanced manufacturing. U.S. battery storage cell manufacturing capacity is amidst a significant ramp up. Starting at nearly zero capacity in 2024, the U.S. is now on track to scale factory production to eclipse domestic project demand by the end of 2026.



Grid Battery Cell Manufacturing

LG ENERGY SOLUTION GRID BATTERY MANUFACTURING

LG Energy Solution will produce ESS cells at four different U.S. plants, including its facility in Holland, Michigan which has already started producing ESS LFP cells. The company's production capacity for ESS cells in North America will be further expanded and reach around 50 GWh in 2026.

SAMSUNG SDI GRID BATTERY MANUFACTURING

Samsung SDI is ramping up production of its grid-scale batteries. Samsung will leverage existing automotive infrastructure to quickly scale domestic cell manufacturing at plants in the Midwest.

TESLA GRID BATTERY MANUFACTURING

Tesla has started production of LFP batteries at its Gigafactory Nevada. This nearly $1 billion investment will ramp up over the next several years with 7 GWh of planned capacity by the end of 2026.

American Lithium Production

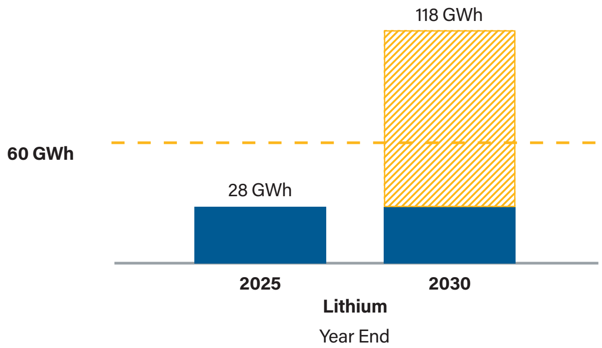
Photo credit: Tesla

While lithium is a key input for advanced batteries across transportation, defense, and energy applications, the rapid growth of the U.S. energy storage infrastructure is now a leading driver of demand for this critical mineral.

As new U.S energy storage demand grows and cell manufacturing scales, this high-volume commercial demand is catalyzing investment across domestic mining and critical materials supply chains. To fully realize these benefits, the Energy Storage Coalition supports the Administration's efforts to pursue bilateral agreements that mitigate supply chain vulnerabilities and strategically deploy the Defense Production Act and other federal financing and permitting authorities to scale domestic lithium extraction, processing, and cathode production.

American Lithium Production

The United States is currently experiencing historic investment in the production of critical minerals like lithium. As critical infrastructure like battery energy storage and defense technologies scale, this end-use demand is driving investment in mining, lithium extraction, and lithium processing.



Lithium and Cathode Production

ALBEMARLE LITHIUM MINE

As the world's largest lithium producer, Albemarle Corporation is advancing plans to resume open pit mining at its Kings Mountain site in North Carolina, one of the key hard-rock lithium deposits in the United States.

TESLA LITHIUM REFINERY

Tesla's $1+ billion lithium refining facility in Corpus Christi, Texas, is expected to process enough lithium to support 30 GWh of battery production per year. The facility represents a major investment in U.S. midstream processing capacity and is a critical step toward strengthening domestic energy security and advance manufacturing.

EXXONMOBIL & CHEVRON LITHIUM SOURCING

ExxonMobil and Chevron USA are leveraging their drilling and resource extraction capabilities to source lithium in the Smackover Formation, which spans Northeast Texas and Southwest Arkansas.

American **Anode Materials** Production

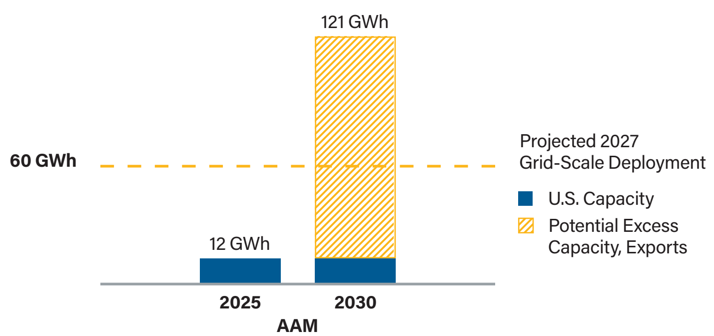
Photo credit: Redwood Materials

Energy storage deployment is also driving investment in domestic production of materials for battery anodes, a crucial component in battery cell manufacturing. **Companies are investing in the production of key anode inputs, including synthetic graphite derived from petroleum refining byproducts and anode-grade copper foil.**

Major energy and materials companies are leveraging decades of expertise in refining, petrochemicals, and large-scale industrial processing to convert petroleum byproducts, synthetic carbons, and potentially coal-derived coke into battery-grade graphite anodes. This approach leverages America's industrial infrastructure and expertise to materially expand U.S. critical mineral production and refining. As deployment of energy storage continues to grow, the industry expects to see a growth of investment and production of synthetic graphite, active anode materials, and anode components, strengthening the broader battery manufacturing industrial base and creating high-quality jobs in the United States.

American Grid Battery Anode Materials Production

Domestic battery grade synthetic graphite and active anode materials lag behind American energy storage systems and cell manufacturing. However, production of this key battery material are expected to quickly scale as demand continues to drive investment. This chart represents total projected anode material production for the U.S. battery ecosystem.



Graphite and Anode Manufacturing

EXXONMOBIL ADVANCED SYNTHETIC GRAPHITE PRODUCTION

Through its acquisition of key assets and technology from Superior Graphite, including its graphitization facility in Kentucky, ExxonMobil plans to upgrade carbon-rich feedstocks from existing refining streams and transform them into advanced synthetic graphite for use in battery anode materials. This can strengthen U.S. industry and enable the build-out of a resilient critical minerals supply chain.

REDWOOD MATERIALS ANODE COPPER FOIL

At facilities in Nevada and South Carolina, Redwood Materials is making significant investments in producing key battery input materials from recycled, spent batteries. This includes copper foil production, a component in large-scale battery anodes.

SILA TECHNOLOGIES ANODES

Innovative companies like Sila Technologies aim to provide alternative anodes that could provide a domestic option for battery manufacturers. Sila's facility in Moses Lake, Washington represents a $100 million investment in the domestic production of alternative battery materials.

Building an End-to-End American Energy Storage Supply Chain

The meteoric growth in U.S. energy storage deployment is now directly mirrored by the rapid expansion of domestic manufacturing capacity. New factories are rising across the Midwest, Southeast, Appalachia, Texas, and the Mountain West, forming a geographically diverse industrial backbone. **As energy storage deployment climbs to provide reliable and affordable power to American families and businesses**, the rapid rise in electricity demand from new data centers and factories drives additional capital investment in the energy storage supply chain.

This has resulted in a self-reinforcing economic engine: rising demand drives deployment of U.S. energy storage resources which in turn drive investment in American manufacturing and mineral production. Ultimately, the energy storage sector is serving as an anchor of economic growth and prosperity, creating new jobs, keeping electricity affordable, and contributing to American energy dominance.

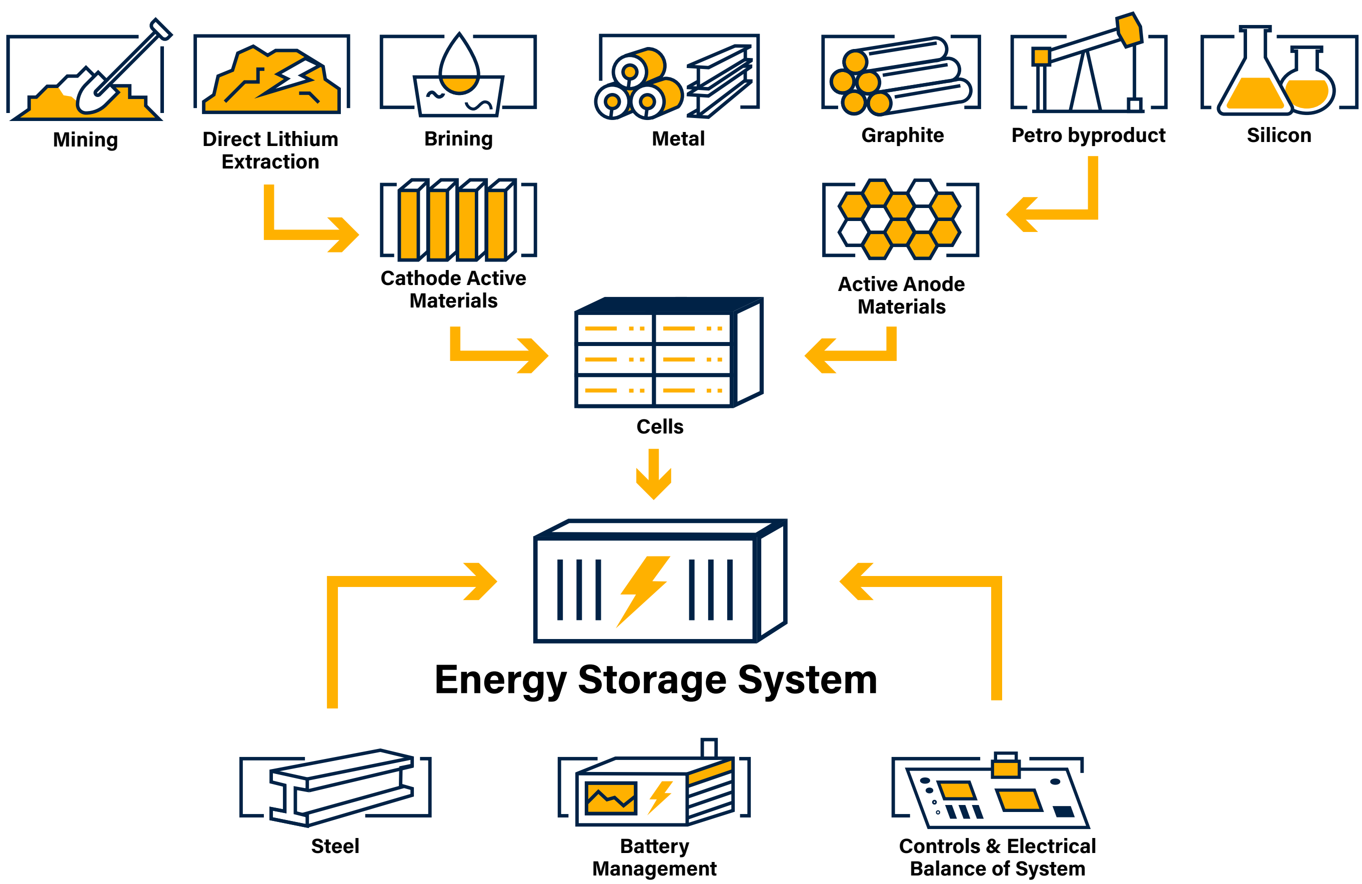


Photo credit: Form Energy

Energy Storage is Driving Innovation in American Manufacturing

Sustained demand for energy storage, coupled with the rapid expansion of domestic supply, is accelerating investment in advanced manufacturing and next-generation energy technologies. As electricity demand grows due to economic expansion, electrification, and industrial reshoring, reliable American-made energy has become a core component of national energy security.

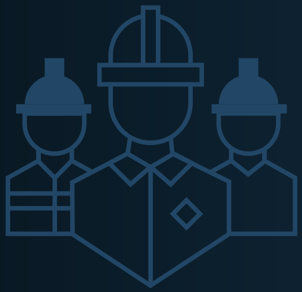
American companies are rising to meet this moment by developing the next generation of storage technologies at home. Long-duration energy storage (LDES) and multi-day energy storage (MDS) are emerging as a new pillar of U.S. innovation and a solution to the need for firm, dispatchable baseload power. U.S. manufacturers are leading the development of new battery chemistries, including Form Energy's 100-hour duration iron-air systems and EOS' zinc-powered chemistry, expanding American technological leadership while strengthening domestic industrial competitiveness.

FORM ENERGY GRID BATTERY MANUFACTURING

Form Factory 1 represents a $760 million investment at the site of a former steel mill in Weirton, West Virginia, to manufacture American-made multi-day energy storage systems, creating 750 jobs.

EOS ENERGY GRID BATTERY MANUFACTURING

EOS Energy manufactures zinc batteries in Pittsburgh where the facility has been ramping up production, reaching 8 GWh by 2027.



350,000+ American Jobs

are expected to be generated by the energy storage sector

These jobs span skilled trades and construction, electrical and mechanical technicians, chemical and materials engineers, manufacturing and quality-control specialists, software and power-systems engineers, logistics and supply-chain professionals, and operations, maintenance, and safety roles that will anchor long-term employment in communities across the country.

Energy storage isn't just strengthening the grid—it's powering a durable American industrial resurgence, creating hands-on career pathways, and ensuring that the technologies securing our energy future are built by American workers, in American factories.