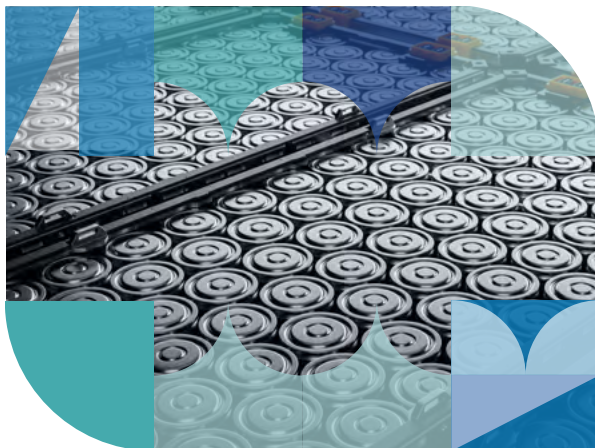


REGIONAL CLEAN ECONOMIES

# Securing the Critical Battery Materials Supply Chain in the Southeast United States

## Regional Policy Roadmap

April 2026



This roadmap presents recommendations for federal, state, and industry actors. For each recommendation, the roadmap identifies the problem, presents policy changes, and explains how the recommended actions will improve the battery and critical materials supply chain in the Southeast. These recommendations were developed in collaboration with regional stakeholders throughout a series of in-person convenings across the southeast United States.



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This roadmap was informed by discussions with individuals from across the battery materials supply chain and related industries, and we are thankful for the valuable input these organizations provided.

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# Federal Recommendations

The coordinating power of federal agencies and programs can bring order to key development and deployment challenges of new technologies as stakeholder scramble to develop systems to support the industry. Federal support is needed to widen the path to commercial scale in the battery industry, which is necessary to secure American energy independence, critical supply chains, and domestic manufacturing.

## 1. Utilize federal supply and demand support mechanisms to accelerate domestic production and procurement of critical battery materials

### The Problem

The United States lacks manufacturing capacity at scale for most materials critical to battery technologies. The first American facilities to produce materials and components for batteries are more expensive than subsequent facilities because they must be purpose-built for their customers' needs and lack the benefits of economy of scale that other mature industries enjoy. In particular, these facilities face challenges in sourcing specialized equipment to match their production processes and from growing construction costs as building materials and labor become increasingly expensive in the United States.<sup>1</sup>

Constructing or expanding facilities amid higher relative startup costs than foreign markets is further challenged by a lack of guaranteed product offtake in a rapidly developing North American battery materials market. Because the downstream manufacturing market is also relatively nascent in the United States, or previously committed to existing foreign suppliers, it is difficult for emerging American battery materials producers to secure guaranteed offtake contracts with customers. This hinders companies' ability to secure favorable interest rates on financing, further driving up the costs of their production and hindering their ability to build out capacity altogether.

### Recommendation

Utilize the Defense Production Act (DPA)'s existing authorities to accelerate domestic production and procurement of critical battery materials and technologies, including:

- Under DPA Title III, support the purchase and installation of manufacturing equipment for processing and manufacturing critical battery materials; support loan guarantees for domestic critical battery materials production.
- Stabilize offtake for domestically produced critical battery materials using flexible financial mechanisms, for instance through the DPA Fund; ensure a percentage of these materials is from recycled content in the United States.<sup>2</sup>
- The DPA Fund must also be reauthorized with expanded funding, or its mechanisms must be replicated through a different legislative vehicle. For instance, the recently introduced SECURE Minerals Act of 2026 has proposed the creation of a strategic resilient reserve to stabilize critical mineral commodity markets.<sup>3</sup>

## Explanation

The federal government can smooth the path to scale through direct support to manufacturers for these high up-front costs in the form of grants, loan guarantees, and flexible non-procurement offtake support. A dedicated entity with flexible financial tools is needed to support both the build out of new facilities to supply markets while ensuring demand support for this first-of-a-kind battery material production in the United States.

The Defense Production Act (DPA) is a key tool to expand industrial capacity for industries critical to national security. DPA Title III provides funding, as appropriated by Congress, that can be used to offer loans, loan guarantees, or other financial assistance to purchase and install equipment, increase production yields, or qualify products.<sup>4</sup> Recent use of DPA Title III has demonstrated the federal government's willingness to use both supply- and demand-side support mechanisms to expand domestic critical material production.<sup>5</sup> The most notable recent example of DPA funding is the Department of Defense's multi-billion-dollar partnership with MP Materials in July 2025, which included an equity investment, a loan, a 10-year price floor commitment, and an offtake agreement to fund the expansion of rare-earth processing and permanent magnet production.<sup>6</sup>

This use of DPA funding to support capital investment and stabilize offtake demonstrates a novel federal approach to growing manufacturing for a strategically important material with an immature market. Similar approaches could be taken to scale manufacturing for other critical materials, such as graphite and lithium, whose global processing capacity is heavily concentrated. However, current funding levels for DPA limit the scope of its use for projects in the critical battery materials supply chain. The fiscal year 2026 Defense Appropriations Act provides only \$321.9 million for DPA purchases, which is potentially lower than just the annual payments for the price-floor commitment in the MP Materials deal if commodity prices fall.<sup>7</sup> For this reason, the current funding levels for the DPA will be insufficient to support an industry-wide build out for new critical material production, rather than offer support for individual projects.

An alternative option to utilizing DPA authority to support offtake is the creation of a specialized government entity with the flexible financial tools to stabilize and scale commercial critical mineral markets. The use of tools such as price floors, advance market commitments, and equity investments could help develop a secure supply for industries that rely on critical minerals and their derivative products, including the battery industry. Examples include the Strategic Resilience Reserve as created by the proposed SECURE Minerals act and Project Vault as created by a recent Export-Import Bank loan.<sup>8</sup>

## 2. Establish and expand purchase and deployment incentives for products containing domestically produced critical materials

### The Problem

Recent rapid swings in federal policy have put the U.S. battery industry into a precarious position, facing significant policy and market uncertainty that hamper development. Incentives passed through the Inflation Reduction Act of 2022—for instance, the 48E and 45Y technology neutral tax credits; the 45X advanced manufacturing tax credit; and the 30D clean vehicle tax credit—all provided tax incentives to support the domestic production and deployment of batteries.<sup>9</sup> In particular, bonuses or outright eligibility percentage requirements for domestic content in the technology-neutral electricity tax credits and the clean vehicle credit were instrumental in supporting companies' decisions to build U.S. production facilities for final battery assembly, cells, and electrode active material.<sup>10</sup> Many of these producers intended to directly supply EV batteries to comply with the 30D domestic content provision.

Now, since the passage of the One Big Beautiful Bill Act in 2025 that ended the 30D clean vehicle credit in September of the same year, there is no consumer-facing incentive to support the deployment of American-made large-format batteries.<sup>11</sup> Without this additional incentive to promote consumer preference for domestically produced materials, electric vehicle and home stationary storage companies have little incentive to source higher-cost inputs domestically, a disadvantage for the emerging industry.

### Recommendation

- Establish and expand purchase, manufacturing, and deployment incentives for products containing domestically produced critical materials, such as:
- Extend and raise the domestic content bonus to 25 percent in the tech-neutral electricity tax credits for stationary storage.
- Extend and raise the value of the 45X tax credit for domestically produced battery materials.
- Reinstate consumer purchase incentives for domestically produced batteries.

### Explanation

Long-term certainty of the level of federal support, as well as the financial incentive for consumers to demand domestically produced battery products, is necessary to supporting companies' ability to secure long-term investments to develop local manufacturing facilities.

New legislation in Congress could reinstate or update federal tax credits with a specific focus on incentivizing large-format batteries utilizing domestically produced materials. The Critical Minerals and Manufacturing Support Act 2.0, for example, was introduced in the House of Representatives in February 2026 to increase the value of the 45X manufacturing tax credit to 25 percent, extend the lifetime of the credit by ten years, and add additional eligibility for key battery inputs.<sup>12</sup>

Similar legislation could extend the 48E tax credit to 2041 and beyond, while maintaining or enhancing the domestic content bonus. Other legislation could establish an American-made battery consumer incentive, based on the specifics of 30D, to provide a refundable tax credit for consumers to purchase domestically-produced large-format batteries for home energy storage or vehicles.

### 3. Create a forum for coordination among research and development efforts and workforce development

#### The Problem

It is exceedingly difficult for researchers to translate innovation from lab scale to commercial scale, in part because of a lack of physical infrastructure that could make this development possible. Especially in the battery materials space, sourcing new equipment to pilot and scale production is capital and time intensive; the research and development (R&D) costs alone are often prohibitively expensive for a single startup.

Additionally, companies are struggling with the need for a comprehensive, standard, and coordinated workforce development approach that would standardize career pathways across the emerging battery industry, while supporting a shared understanding of necessary skills and talent development pathways for workers entering the sector.

#### Recommendation

- Form a Battery Manufacturing USA Institute under the Manufacturing USA umbrella. This institute would:
- coordinate pre-competitive, industry-led applied R&D for the battery industry
- coordinate R&D efforts among academic research centers across the country
- accelerate industry adoption of new battery materials technologies and advanced manufacturing processes
- coordinate workforce development and career pathways in the emerging U.S. battery industry.

#### Explanation

A central coordinating body focused on developing the battery manufacturing industry could help identify research needs and support pre-competitive R&D efforts, coordinate the use of shared infrastructure to maximize resources and accelerate technological development, and support industry-wide workforce development pathways.

Manufacturing USA is a public-private partnership operated by the National Institute of Standards and Technology (NIST) in the U.S. Department of Commerce.<sup>13</sup> It includes a network of 17 institutes focused on supporting manufacturing innovation, workforce development, and the build-out of a domestic supply chain for key advanced manufacturing products. For example, PowerAmerica—centered in Raleigh, North Carolina—focuses on accelerating the adoption of advanced semiconductor components. To date, none of the institutes is specifically focused on battery development.

To create a new institute, a federal agency launches a funding opportunity to award a consortium lead for a new institute to address a critical need or gap. Then, other organizations may submit proposals and, when selected, convene many partners across the ecosystem. In this case, the U.S. Departments of Energy and Defense should collaborate to support the development of this new institute, in recognition of the critical role the battery manufacturing industry plays to both the nation's energy systems and national security.

To elevate the cutting-edge innovation and workforce development already being done by universities, companies, and other partners across the Southeast, this institute should be centered in the Southeast region, ideally at one of the existing

battery research centers, and encourage complementary development among leading efforts. This institute would serve as a central coordinating body, led by industry and supported by federal funds and expertise, that could elevate the disparate research and development, workforce development, and manufacturing process improvement efforts across the country.

## **4. Create an office to federally coordinate battery safety standards and offer educational resources to interpret them**

### **The Problem**

There is no office in the federal government that aggregates battery safety standards and resources, making it difficult for policymakers and communities to navigate the many competing sources of information. Several global organizations, (e.g., the National Fire Protection Association (NFPA), the Society of Automotive Engineers (SAE), and UL) set voluntary safety standards for the design and safe handling of batteries, but no coordinating body exists in the United States to centralize these many standards and resources.

Additionally, particularly for small communities new to energy storage, it can be challenging to interpret safety standards around battery installation and operation when determining local zoning and deployment best practices. A federal office that centralizes safety resources and standards and provides educational materials for a variety of audiences is necessary. Such an office could connect policymakers, employers, and the general public to crucial information to smooth the path to development of the battery industry.

### **Recommendation**

Establish, in consultation with NFPA, SAE, and UL, an Office of Battery Safety within the U.S. Department of Energy to aggregate safety resources such as design or deployment standards and education resources for policymakers, companies, and consumers to interpret them. New standards and resources endorsed by this office should be approved by a panel of technical experts to ensure they are scientifically rigorous and high quality.

### **Explanation**

The U.S. Department of Energy's Office of Environment, Health, Safety, and Security already houses its Technical Standards Program, which promotes the use of voluntary consensus standards.<sup>14</sup> These may include safety standards for nuclear facilities, explosives, and fire protection, among others. However, there is no comprehensive resource for batteries, and those safety standards are generally limited to operational safety.

A similar program or office should be created within DOE with an explicit focus on battery safety. This office should aggregate technical and safety standards for batteries and include resources in plain language to better facilitate their interpretation by communities, employers, and policymakers.

This office could be created by action within the agency itself, or at the direction of Congress through legislation. To support the durability and impact of this office, funds should be appropriated to support its creation, maintenance, and administrative capacity.

# State Recommendations

Additional coordination of local efforts, as well as increased regional ambition, is necessary to support the development of the industry in the region. States across the Southeast are in the position to enact policy tailored to the specific needs of their businesses, institutions, and communities. Each of these recommendations should be implemented to elevate the individual characteristics of each state and the existing organizations operating within them.

## 5. Form a regional financing entity to aggregate financial support for the battery industry.

### The Problem

The Southeast lacks the critical mass of investors to commercialize new battery technologies being developed at regional research institutions and labs, especially at the pre-seed stage where expert advisors are needed to help form startups. Furthermore, the current diversity and size of potential U.S. offtakers are insufficient for battery innovators to sell their product and raise revenue. Few companies have been able to make the jump from pilot- to large-scale manufacturing without significant financial or technological support at the stages in between to demonstrate and scale their process.

Even for larger-scale manufacturers who have proved their processes and validated their products, securing low interest loans to fully finance new facility production lines is a major barrier to development, particularly in the battery supply chain with high capital intensity and long return timelines. The Southeast is beginning to develop an expansive regional industrial cluster for battery and critical materials, but states across the region will need to combine resources and collaborate to become competitive in an increasingly mature global industry.

### Potential Mechanism

Create and fund a Southeast Energy Finance Authority (SEFA) to:

- Provide pre-seed funding for innovative battery and critical material companies developed in Southeast research institutions.
- Facilitate advance market commitments for battery materials, technologies, and products.
- Offer credit enhancements (such as loan guarantees) to private banks looking to invest in new critical battery materials facilities in the region.
- Support shared energy and logistics infrastructure development to enable industrial clustering.

### Explanation

Several states across the United States have established new quasi-public-private financial institutions that use private sector tools to achieve public sector goals. These institutions, often known as innovation banks, infrastructure banks, or green banks work to deploy clean energy projects and improve energy infrastructure. Multiple institutions already operate across the Southeast to deploy advanced clean energy projects and upgrade critical energy infrastructure and industrial sites to attract new manufacturing.

In North and South Carolina, the Clean Energy Fund of the Carolinas provides affordable finance for clean energy projects across the two states. In Alabama, the recently established Alabama Energy Infrastructure Bank will provide financing to

prepare sites for new facility development, improve energy infrastructure for new manufacturing, and leverage state funding to attract private investment.<sup>15</sup> These organizations provide a template for the types of financial support needed to support clean energy at the project and deployment level. However, an entity using similar tools but designed to support new company formation through commercial-scale manufacturing for a specific industry does not exist.

The financial mechanisms used by innovation banks would be a powerful tool to help crowd in private capital to scale the battery industry. At a larger scale, the Office of Energy Dominance Financing (formerly the Loan Programs Office) at the Department of Energy demonstrates the use of financial mechanisms to help reduce risks for private lenders investing in innovative projects. Combining these two approaches at the regional level could create a world-leading industrial cluster. Standing up this effort must start by identifying champions, ideally led by industry voices and representative groups, and accessing funding sources to capitalize this entity. One potential strategy to support this effort is the creation a specific financial mechanism, like a Special Purpose Vehicle (SPV), to pool investment from battery industry companies who will jointly benefit from specific supply chain and infrastructure projects in the Southeast region. SPVs have become an increasingly important tool to allow hyperscalers to jointly invest in new data center development while acting as separate entities to facilitate partnership and isolate financial risks.<sup>16</sup>

Alternatively, an interim first step could be taken by financing organizations already operating in the region, to aggregate demand for end use battery products manufactured in the region. This would provide certainty for producers, particularly the smaller producers still working to secure financing but in need of demonstrated long-term offtake.

## **6. Set a regional energy storage procurement goal with separate provisions for short-duration and long-duration energy storage.**

### **The Problem**

Rapidly-shifting federal policy has left companies in the United States without a clear and consistent demand signal for batteries, and falling projections of EV sales have led U.S. battery producers to consider serving the growing stationary storage market instead.<sup>17</sup> At the same time, states are navigating a rapid surge in electricity demand for the first time in decades, and are grappling with the challenges of quickly deploying affordable, reliable, resilient energy—challenges stationary storage systems are well-positioned to address.<sup>18</sup>

### **Recommendation**

Working across state governments, public utilities commissions, and utilities, the Southeast region should set an ambitious energy storage deployment goal. To support achieving this goal, each state should also set a complementary state-level energy storage procurement target. These targets should include separate provisions for short- and long-duration energy storage solutions. Targets should prioritize domestically produced energy storage systems.

### **Explanation**

States with strong, clearly articulated goals to procure utility-scale energy storage will contribute to the clear, reliable, long-term demand signal needed to stabilize the stationary storage market. Setting a goal—especially one that is competitive with other states—helps to provide some of the long-term certainty producers need to

underpin their investments into domestic facilities. Deploying energy storage on the grid at scale will require intentional planning and effort on the part of states, utilities, and grid operators; and serving this market will require longer-term certainty for companies in the supply chain.

Stationary storage is an important solution that can help to smooth peaks and valleys in power generation and demand throughout the day while providing backup power to critical infrastructure like hospitals in the case of extreme weather. New battery and long-duration storage installations can be deployed relatively quickly compared to natural gas generation and pairing them with existing and new solar or wind generation can help these intermittent resources be used to their fullest capacity while allowing ratepayers to benefit from the cost savings batteries can help generate.

Thirteen states already have state energy storage targets, including Virginia, with a target of deploying 3.1 GW of energy storage capacity by 2035.<sup>19</sup> In addition to setting overall energy storage targets, multiple states differentiate between short-duration and long-duration storage in their targets, including California and New York.<sup>20</sup> (The Virginia state legislature is considering a bill to add a specific long duration energy storage target and raise its overall goal.)<sup>21</sup>

In each state in the Southeast, a combination of executive leadership, action by the public utility commission in collaboration with utilities, and legislative support could be used to set an energy storage deployment target that would encourage the integration of storage resources into the electricity system, promoting grid reliability and bolstering system-wide resilience while increasing near- to mid-term certainty around regional demand for domestically-produced batteries and supporting local industry development.

## **7. Coordinate industry, government, and academic action on battery technology innovation and supply chain development**

### **The Problem**

Fragmentation of efforts to support the battery industry has hindered the ability to take a holistic approach to maximizing the local economic benefits of battery supply chain development. In many states, growing interest in battery development and deployment has led to several government initiatives hosted across disparate agencies. This may separate technical resources for battery manufacturers from safety resources for workers, which are also separate still from resources for communities evaluating options to site stationary storage. Grants, loan programs, and consumer incentives that may be applicable to batteries, whether stationary storage or EVs, may be housed in different agencies across the state.

### **Recommendation**

In each state, legislators should support a “Battery Storage Center” in collaboration with key industry partners, academic leadership, and state government for the purposes of centralizing collaborations in the state around battery storage deployment and supply chain development.

### **Explanation**

Examples exist for state action to enact or support energy-specific centers to coordinate efforts to develop an industry. In 2013, the Virginia state legislature created the non-profit Virginia Nuclear Energy Consortium Authority to support the

commercialization of new nuclear technologies, foster public-private and cross-sectoral partnerships, and support the attraction of new businesses.<sup>22</sup> In 2024, the Kentucky state legislature created the Kentucky Nuclear Energy Development Authority.<sup>23</sup> The Authority is attached to the University of Kentucky's Center for Applied Energy Research and works to support the nuclear energy ecosystem in Kentucky to grow the state's economy, energy production, and advanced energy workforce.

Several states across the Southeast have launched research and development centers focused on supporting development in the battery industry. These centers of innovation include the North Carolina Battery Industry Partnership, the University of South Carolina's Carolina Institute for Battery Innovation, Georgia Tech's Advance Battery Center, and the University of Alabama's Alabama Mobility and Power Center. Each of these centers serve to bring together industry, academia, and government to drive the industry forward through technologic, workforce, and economic development.

States in this region should support the expansion of these centers offerings through legislative action similar to the support the nuclear industry has received. Supporting the continued development of these centers, or the formalization of their status, will be crucial elements in the growing the battery industry ecosystem for each state.

# Industry Recommendations

The following recommendations may include suggestions for policymaker action at the federal or state level, but must be led and implemented by industry to be achieved successfully. Both require significant coordination and standardization among the many players across the industry that are essential to crafting a cohesive approach to battery ecosystem development.

## 8. Facilitate the formation of a clear certification pathway and standard set of credentials for workers in the battery industry.

### The Problem

Presently, while there are many workforce development initiatives across the country led by companies and academic institutions supporting individual projects, there is no singular standard of skills and certifications for new entrants to the battery industry that makes it clear which competencies are necessary and how workers can develop them. Additionally, there is no established K–12 curriculum for batteries that reflects consensus of the industry. Students may not learn that there are career pathways open to them in the industry unless they are directly introduced to opportunities.

A clear, consistent, and standard set of credentials for workers in the battery industry is necessary to address this gap.

### Recommendation

Led by industry, the private sector, academic institutions, workforce development and training providers, and policymakers should collaborate to facilitate the formation of a clear certification pathway and standard set of credentials for workers in the battery industry, including:

- an entry-level credential for all incoming workers in the battery industry demonstrating a basic knowledge of safety and battery-specific technological makeup
- a K–12 facing curriculum to integrate batteries into standard science, technology, engineering, and mathematics (STEM) learnings for students.

### Explanation

Current efforts to develop standard curricula presently underway include work by academic institutions and trade associations across the country, as well as the Battery Workforce Initiative through the U.S. Department of Energy, which will offer a complete training and certification curriculum for battery cell manufacturing only. Industry and training providers must come together to develop and house a clear set of training standards and materials for the next generation of battery industry workforce that is comprehensive across the end-to-end battery supply chain. This recommendation could be complemented by the creation of a Battery Manufacturing USA Institute, which could serve as a central node for workforce development and curriculum coordination.

One example in an adjacent industry is the Edison Electric Institute (EEI) testing and training program.<sup>24</sup> For all EEI's member companies, the association provides clear and standardized employment tests to validate the skills of workers across the electric utility industry. These tests are tailored to specific positions within the electric power industry, such as power plant operators and systems operators.<sup>25</sup>

One additional advantage of this system is the standardization of job titles and roles across the industry that make it possible for workers in one location to transition easily to another. A similar set of testing, training, and standard certification pathways informed and accepted by industry could help to coordinate across the battery sector.

## **9. Create a broader understanding of the benefits and opportunities of building an American battery industry.**

### **The Problem**

Many policymakers are unaware of the interconnected nature of battery supply chains and the economic growth potential of the industry for American communities. This leads to missed opportunities to enact holistic support for the whole of supply chain development needed to create a secure domestic battery industry.

In a challenge to the deployment of batteries, community members often hold misconceptions on the safety of battery technologies leading to hesitance to adopt the technology in transportation and energy storage contexts.

Students and early-career workers may not have been familiarized with the opportunities of the battery industry. To ensure the long-term viability of the industry, there needs to be a pipeline of talent entering the battery sector; curricula need to adjust to attract the battery workforce of the future.

### **Recommendation**

Create a messaging and outreach campaign to educate key stakeholders on the emerging American battery industry, with resources for:

- policymakers, on the nuances of battery supply chain development and battery storage deployment
- communities, on the safety and resilience implications of battery storage
- students and young workers, on the opportunities of the battery industry.

### **Explanation**

Multiple organization across the Southeast and United States generally have engaged in developing messaging material to promote the battery supply chain to different audiences. At the federal level, trade groups like NAATBatt are creating factsheets and informational pamphlets to demonstrate the economic and national security importance of the battery industry. Non-profits at the state and regional level are developing messaging tools and webinars around battery safety and workforce development. State organizations like the NC Battery Industry Partnership are working to provide toolkits at the local level for effective messaging around all these issues.

There is a need to coordinate these resources into a cohesive effort across audiences, including policymakers and the public. The messaging campaign should address the need for whole-of-supply chain policy support, develop the public understanding and acceptance of battery technology, promote safe siting and conduct around batteries among policymakers and the general public, and support recruitment for future industry workers. The process of developing and executing this messaging effort should be industry led to ensure that it meets the needs of the growing battery sector in the United States, though it must be validated and supported by trusted messengers such as community organizations, academic institutions, national laboratories, and local community leaders. Securing the Critical Battery Materials Industry in the Southeast United States

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