



REALITY COALITION

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China's monopoly over graphite for batteries imperils US energy, security

The problem has been largely ignored, even by policy makers and military strategists
WASHINGTON, DC. China has virtually total monopoly control over the processing and availability of natural and synthetic graphite, an essential component of almost all lithium-ion batteries, including electric vehicle batteries, which are 40% graphite by weight.

A new Net Zero Reality Coalition (NZRC) [report explains](#) how this monopoly enables the Chinese Government to affect Li-ion battery production, pricing and availability worldwide. China could control markets for equipment required to transition from fossil fuels to renewables, harm or bankrupt competitors, and even force nations to acquiesce to its geopolitical initiatives over Taiwan, the Pacific Rim, the Paris climate agreement and other matters.

“President Biden wants to convert gasoline and diesel cars, light trucks, semi-trucks, buses, trains and even military vehicles to battery power,” notes report author David Wojick, PhD. “He wants to force us to switch from natural gas to electricity for furnaces, stoves and water heaters.

“Getting all that electricity from wind and sunshine means we’d need hundreds of millions of vehicle battery modules, plus millions of huge grid-scale batteries to back up intermittent, weather dependent wind and solar power, to avoid frequent and widespread blackouts,” Wojick emphasizes. As graphite requirements skyrocket, China’s monopoly power will also surge.

Processing and purifying graphite requires large amounts of toxic, dangerous hydrofluoric acid, as well as enormous amounts of reliable, affordable energy, the report points out.

“Safety and environmental regulations would likely make it too complicated and expensive to build those facilities in the USA and other Western countries,” says NZRC advisor Paul Driessen. “But China has shown a willingness to ignore ecological and worker safety issues, to produce graphite, as well as cobalt, rare earth elements and other materials for carbon-free economies, at nearly rock-bottom costs, to protect its monopolies and control supply chains.”

As a result, America’s energy systems, economy and military are becoming increasingly reliant on monopolist and often adversarial China for these critical raw materials. However, the realities of this graphite monopoly have flown under the radar of the White House, Congress, news media, and even energy and manufacturing sectors. Wojick and the NZRC are the first experts to raise awareness about this monopoly.

NZRC members include the Committee For A Constructive Tomorrow (CFACT), American Policy Center (APC), Competitive Enterprise Institute (CEI), Energy & Environment Legal Institute (E&E Legal), Heartland Institute and International Climate Science Coalition (ICSC).

<https://www.CFACT.org/NetZeroRealityCoalition/>

<https://www.cfact.org/wp-content/uploads/2024/03/Wojick-Chinas-graphite-monopoly-report.pdf>