

Minerals in Renewables

1. Graphite (Cg), imported at a rate of 100%, is used in electric vehicle batteries. China is the global leader in graphite production, providing 60% of the world's supply in 2019 and supplying a third of U.S. imports.

2. Gallium (Ga) is used in solar cells and is critical to their function. Gallium is imported at a rate of 100%, with half coming from China.

3. Cobalt (Co) is essential to the function of electric vehicle batteries. The vast majority of the world's cobalt supply is sourced from the Congo, and 78% of U.S. demand is met by imports. Cobalt is almost exclusively found in copper-nickel deposits, of which we have several in the U.S.

4. Indium (In), is a component of solar cells and is imported at a rate of 100% in the United States, with 36% imported from China.

5. Tellurium (Te), imported at a rate of 95% with a quarter coming from China, is an integral component of solar panels and is eight times rarer than gold.

6. Rare earth elements are irreplaceable in the modern economy, used in dozens of technologies across sectors, such as the magnets and batteries in wind turbines. 100% of the rare earths supply in the United States is imported, with 80% sourced from China.

