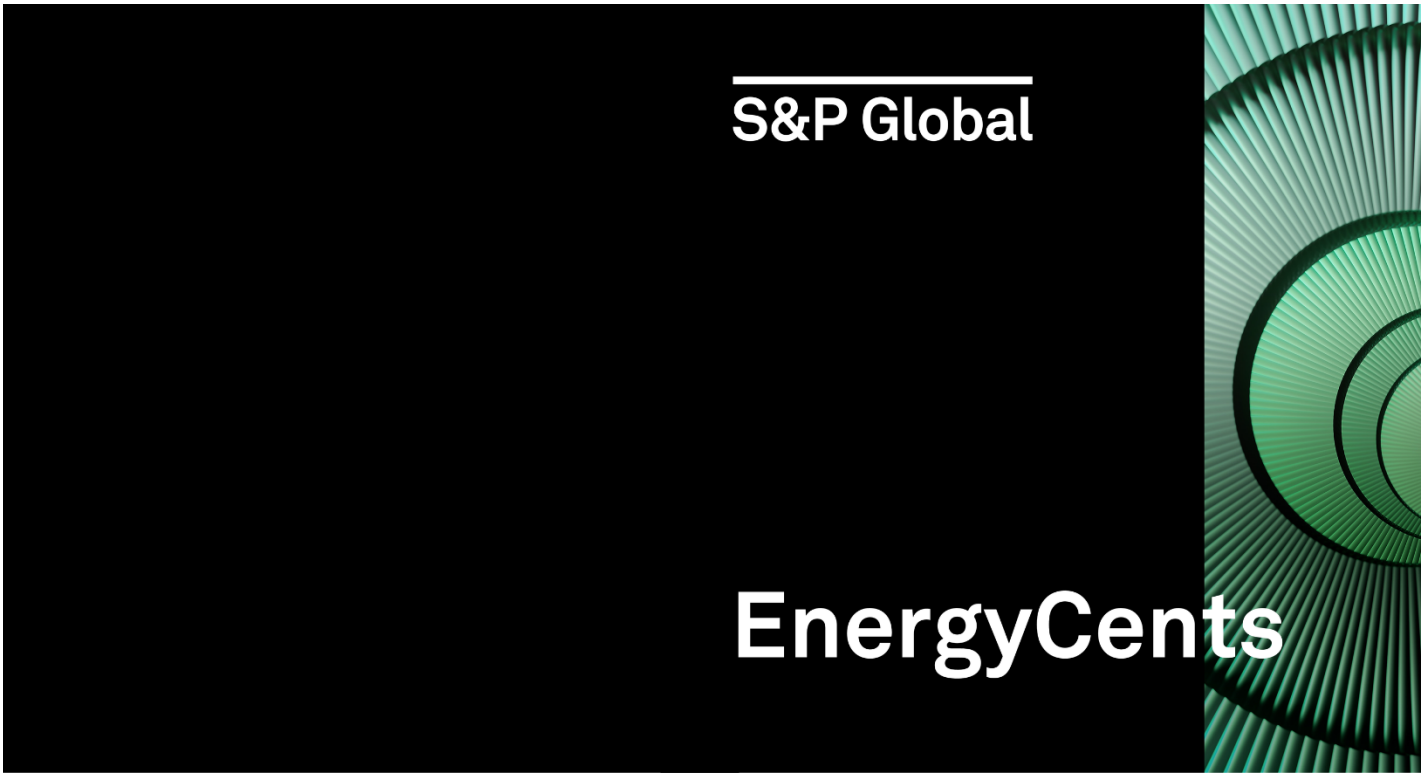
NOVONIX' Mike O'Kronley joins S&P Global Energy EnergyCents Podcast, "The Graphite Gap: Reshoring a critical battery material" (Ep. 270)

November 16, 2026



The 38 minute discussion covers key challenges and opportunities facing the U.S. battery materials industry, including:

- The crucial role of synthetic graphite in batteries
- China's dominance of synthetic graphite production
- Leveling the playing field with strategic tariffs
- The investment case for a U.S. manufacturing resurgence
- The requirements for mass production, including supportive government action

Links to episode:

S&P Global Official Site - https://www.spglobal.com/energy/en/news-research/podcasts/energycents
Spotify - https://open.spotify.com/episode/1uBnxcxuWUPHfBM7lwwvOt?si=0B8420DFQyqUL387VD5e1A
Apple Podcasts - https://podcasts.apple.com/us/podcast/the-graphite-gap-reshoring-a-critical-battery/id1372993807?i=1000801762537