

Northern Graphite Comments on Impacts of US Decision to Impose Antidumping Tariffs on Chinese Graphite

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Ottawa, July 22, 2025 - [Northern Graphite Corp.](#) (TSXV: NGC) (OTCQB: NGPHF) (FSE:0NG) (XSTU: 0NG) (the "Company" or "Northern") is pleased to provide comment on and clarify recent developments in the US critical minerals industry that promote a shift toward domestic sourcing of graphite based active anode material ("AAM"), the largest component of lithium-ion batteries used in everything from power tools to electric vehicles.

The U.S. Department of Commerce's ("Commerce") preliminary determination last week that China is dumping AAM into the American market marks a change in the North American battery materials landscape, especially when viewed alongside President Donald Trump's "Big Beautiful Bill."

In its July 17 determination, Commerce imposed preliminary anti-dumping (AD) tariffs of 93.5% on imports of Chinese graphite-based active anode material, including AAM within finished lithium-ion batteries. The effective tariff rate for AAM is now 160% when added to countervailing duty (CVD) tariffs of 11.5% placed by Commerce in May, President Trump's blanket 30% tariff on goods from China, and 25% Section 301 tariffs implemented by USTR last year.

The measures are effective almost immediately and are retroactive, meaning importers must post large cash deposits on recent and future shipments. In a statement posted to its website, Commerce noted the value of AAM imports from China amounted to US\$350 million in 2023 and \$380 million in 2022. Commerce identified a number of Chinese firms subject to the preliminary 93.5% duties, while others that were not specifically listed and which are not able to demonstrate independence from the Chinese government, will face even higher rates of 102.72%.

"Following the recent passing of the Big Beautiful Bill, which already puts pressure on battery manufacturers to source their materials from outside China or risk losing access to the 45X tax credit, this determination increases the likelihood that U.S. battery manufacturers will turn to regional suppliers like Northern," said Northern Chief Executive Officer Hugues Jacquemin. "Together, these developments strongly favour domestic sourcing and represent a historic opportunity for North America's only producer of natural graphite, Northern Graphite. With plans to build one of the region's largest AAM plants in Baie-Comeau, Quebec, Northern is well positioned to support a secure and sustainable graphite supply chain for North America as the market continues to develop."

Northern Graphite is a founding member of the North American Graphite Alliance (NAGA), a coalition formed to advance policy and promote investment in a secure domestic graphite supply chain. NAGA has worked actively to engage U.S. policymakers and advocate for trade measures and incentives that support the development of a sustainable and competitive graphite industry that can meet demand from legacy and defense applications and the rapid growth driven by the energy transition and widescale electrification.

The antidumping and countervailing duty cases were initiated by the American Active Anode Material Producers (AAAMP), a subset of NAGA, alongside other North American AAM industry petitioners with Commerce and the International Trade Commission (ITC) in December 2024. The anti-dumping investigation determined that AAM is being sold at less than fair value ("dumped"), and follows a separate, countervailing duty (CVD) investigation in which Commerce made a preliminary determination in May that affirmed that the Chinese government is subsidizing the production and supply of graphite AAM to the United States.

"While preliminary, this determination carries real and immediate legal weight," said Mr. Jacquemin. "It's a clear signal that efforts to establish a fair and competitive North American graphite industry are gaining

traction."

The final determinations for both the AD and CVD investigations - which could result in higher tariffs - will be issued around December 5th, 2025.

View more on the Commerce determination here: Preliminary Affirmative Determination in the Antidumping Duty Investigation of Active Anode Material from the People's Republic of China.

View comments from the AAMP here: AAAMP Welcomes Commerce Ruling That China Is Wrongfully Dumping Graphite Into U.S. - North American Graphite Industry.

About Northern Graphite

Northern, the only flake graphite producing company in North America, is a Canadian, TSX Venture Exchange listed company that is focused on becoming a world leader in producing natural graphite and upgrading it into high-value products critical to the green economy, including anode material for lithium-ion batteries/EVs, fuel cells and graphene, as well as advanced industrial technologies. The Company's mine-to-battery strategy is spearheaded by its Battery Materials Division, which has a fully equipped, state-of-the-art laboratory in Frankfurt and is focused on developing advanced anode materials to improve the cycle life and increase the charging rate of lithium ion batteries.

Northern's graphite assets include the producing Lac des Iles mine in Quebec where the Company plans to increase production to meet growing demand from industrial customers and coming demand from North American battery makers. The Company also owns the large-scale, advanced stage Bissett Creek project in Ontario, the Mousseau Project in Quebec and the fully permitted Okanjande graphite mine in Namibia that is currently on care and maintenance. All projects have "battery quality" graphite and are located close to infrastructure in politically stable jurisdictions.

For media inquiries contact
Pav Jordan, VP of Communications
Email: pjordan@northerngraphite.com

For additional information

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