

EZASSI SIGNALS

Your market, watched.

Name the competitor, technology or regulation that could change your plans. Ezassi Signals tells you what's shifting, how sure we are, and what to do about it — written up and ready to act on, not another feed to read.

2+

independent events behind every signal. One headline is a report, not a signal.

3

confidence bands — with the missing evidence named when a call sits below High.

7

signals from a single cycle on sodium-ion batteries. One is on the next page.

WHAT EVERY SIGNAL GIVES YOU

What we saw

The pattern, built from dated events you can check — not a single press release.

Why it matters

What it means for your products, customers and markets, written against your scope.

How sure we are

High, Medium or Low. And Inconclusive when the evidence doesn't support a call yet.

What to do

A recommended action, so the signal ends in a decision rather than a reading list.

POINT IT AT ANYTHING

Competitor

Where a rival is moving next

Startup

When a new entrant becomes real

Commercial

Whether a technology is taking hold

Research

Whether the science is advancing

Regulatory

What's changing, and when it bites

Not a tool you have to run. The work, done.

Patterns found, weighed and written up against your business — and re-tested every cycle, so a call that stops holding gets re-scored instead of quietly dropped.

China just taxed lithium-ion batteries — and exempted sodium-ion until 2028.

HIGH CONFIDENCE

Short-term (3–12 months)

Regulatory & Policy

Status: Review

LITHIUM-ION, FROM 1 SEPT 2026

2%

new consumption tax on lithium-ion batteries in China, after an 11-year exemption

LITHIUM-ION, FROM 1 SEPT 2027

4%

the rate doubles a year later

SODIUM-ION, TO 31 DEC 2028

0%

exempt — but only for products that meet national standards and hold qualifying test reports

How sure: Status Review. The exemption is conditional and time-limited, and the sources don't yet translate it into a per-kWh price gap.

WHAT WE SAW

Bloomberg Tax, PwC China and HKTDC independently confirm the same enacted framework: lithium-ion taxed at 2% rising to 4%, sodium-ion exempt through 31 December 2028 for qualifying products.

WHY IT MATTERS

Sodium-ion now has a government-enforced cost edge over LFP in China, which should pull grid-storage demand forward. It doesn't reach US or European UPS markets, and it ends in 2028 unless renewed.

WHAT TO DO

Watch which sodium-ion cells clear the national standards that gate the exemption. CATL's and HiNa's qualifying filings would be the first proof of commercial readiness.

Sources: [pv magazine](#) · [Bloomberg Tax](#) · [HKTDC](#) · [VAT Update](#)

This is 1 of 7 signals from one cycle.

The other six cover CATL's delivery window, North America's supply gap, LFP makers adding sodium lines, the hard-carbon bottleneck, falling lithium prices and the missing UPS safety listing.

[See all 7 signals →](#)

Put a watch on your question.

See all nine samples and tell us your question: ezassi.com/ezassi-signals-sample-library

info@ezassi.com · ezassi.com