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Sodium-ion Batteries for Stationary Storage

Commercial Signals · October 2026

A Commercial watch on sodium-ion batteries for stationary storage: supplier agreements, pricing against LFP, certification, supplier risk, US trade and tax-credit rules, and US-based supply. Read for a North American maker of modules, packs and containerized storage systems that buys LFP cells. Five signals from one cycle.

#	SIGNAL	CONFIDENCE	HORIZON	STATUS
1	CATL signed a 60 GWh, three-year sodium-ion deal with HyperStrong in April 2026 and added European agreements by October, but the European volumes are targets and MoUs, not deliveries	Medium	Short-term (3–12 months)	Verified
2	A Chinese tender priced sodium-ion systems at about \$153/kWh against \$79/kWh for LFP, and cell prices show a smaller but real premium	Medium	Short-term (3–12 months)	Verified
3	Natron Energy ceased operations on September 3, 2025 with about \$25 million in orders it could not deliver without further UL certification	High	Immediate (0–3 months)	Review
4	A 25% Section 301 rate on Chinese non-EV lithium-ion batteries and a 55% storage tax-credit sourcing floor apply from 2026, and the rules do not yet say how sodium-ion cells are treated	High	Immediate (0–3 months)	Review
5	Peak Energy shipped a US sodium-ion storage system to a nine-customer pilot in July 2025 and has said its US factory would open in 2027	Medium	Long-term (1–3 years)	Review

Every signal rests on two or more dated events. Confidence is published as a band. Where a signal sits below High, the reasoning names the evidence that is missing. Status says where the evidence stands: Verified, Review, or Inconclusive — we looked, and the evidence does not yet support a firmer call.

SIGNAL 1 OF 5

CATL signed a 60 GWh, three-year sodium-ion deal with HyperStrong in April 2026 and added European agreements by October, but the European volumes are targets and MoUs, not deliveries

MEDIUM Short-term (3–12 months) · Supply & Production Readiness · **Verified**

CATL announced a three-year, 60 GWh sodium-ion supply agreement with HyperStrong, signed April 27, 2026. It followed with a 2 GWh agreement with Solarpro and a 5 GWh agreement with Alfen, then a target of up to 3 GWh with Intilion on October 9. The Intilion figure is a development target, not confirmed deliveries.

REASONING

The HyperStrong agreement is the only large volume with a named signing date and CATL's own announcement. The European items are weaker. pv magazine describes the Intilion figure as a development target and reports no projects, contract values or delivery schedules. The band is held at Medium because the volumes are large but no completed delivery appears in the sources. The word "largest" is CATL's own claim.

PATTERN

April 27, 2026: CATL and HyperStrong signed a three-year, 60 GWh sodium-ion storage agreement in Ningde, announced by CATL on May 6. July 2026: Alfen announced a 5 GWh agreement with CATL for European deployments, about a month after CATL's June product launch. July 21, 2026: CATL and Solarpro agreed to 2 GWh of sodium-ion storage systems for Central and Eastern Europe, with a first project planned later in 2026. October 9, 2026: Intilion announced it would develop up to 3 GWh of sodium-ion projects with CATL in Germany, Austria and Switzerland over five years.

IMPLICATION

Sodium-ion supply from CATL is being committed to integrators who signed first. pv magazine reports that CATL expects international deliveries from June 2027, while Solarpro plans a first project this year. The sources do not reconcile the two dates. For a maker that buys cells, the open question is whether any volume will reach North American buyers.

RECOMMENDED ACTION

This quarter, ask any sodium-ion supplier you are considering for a delivery schedule, a UL 9540 system listing and a price against LFP before you quote a sodium-ion system to a customer. Record the answers next to your current LFP cell quotes.

SOURCES & WHAT THEY SIGNAL

- [CATL — HyperStrong sodium-ion energy storage cooperation agreement](#) — CATL's May 6, 2026 announcement of the three-year, 60 GWh agreement signed April 27; the "largest" claim is CATL's.
- [pv magazine — CATL and Intilion target up to 3 GWh of sodium-ion storage in Europe](#) — October 13, 2026; the 3 GWh over five years is a development target; CATL expects international deliveries from June 2027.
- [CnEVPost — CATL signs 2 GWh sodium battery storage deal with Solarpro](#) — July 21, 2026 agreement for Central and Eastern Europe; first project planned later in 2026.

- [Energy-Storage.News — Europe's system integrators move quickly on sodium-ion with CATL](#) — October 9, 2026; Alfen's 5 GWh deal and Intilion's agreement with CATL.

SIGNAL 2 OF 5

A Chinese tender priced sodium-ion systems at about \$153/kWh against \$79/kWh for LFP, and cell prices show a smaller but real premium

MEDIUM Short-term (3–12 months) · Pricing & Commoditization · **Verified**

In a Renqiu storage tender reported by CNESA, sodium-ion systems averaged about \$153/kWh and LFP systems about \$79/kWh. The lots were different sizes, so the gap is partly a market effect. At cell level, CTVC reported sodium-ion at \$70–110/kWh against about \$50/kWh for LFP on May 4, 2026.

REASONING

The two numbers measure different things. The tender compares system prices, from a 40 MWh sodium-ion lot and a 360 MWh LFP lot. CTVC compares cell prices at commercial scale. Both show a premium. The tender article says the gap is a market signal rather than a pure chemistry difference. The band is held at Medium because neither figure is a quote a buyer in North America could get.

PATTERN

May 4, 2026: CTVC reported sodium-ion cells at about \$70–110/kWh at commercial scale, a premium to LFP at about \$50/kWh. September 2026: the Renqiu tender in Hebei, a 100 MW/400 MWh project, awarded 40 MWh of sodium-ion systems at about \$153/kWh and 360 MWh of LFP systems at about \$79/kWh. October 10, 2026: battery-tech.net reported the CNESA figures.

IMPLICATION

On these figures, sodium-ion does not undercut LFP today, so a sodium-ion system would have to sell on something other than price. A utility or developer comparing bids will see the premium first. A maker that quotes sodium-ion without a like-for-like LFP price invites the comparison on the customer's terms.

RECOMMENDED ACTION

This quarter, price one reference system both ways, sodium-ion and LFP, on the same delivered basis, with cells and systems shown separately. Use it as the baseline for any sodium-ion supplier quote you receive.

SOURCES & WHAT THEY SIGNAL

- [battery-tech.net — Why sodium-ion won 2026 and all-solid-state is still a 2027 bet](#) — October 10, 2026; Renqiu tender figures via CNESA and the lot sizes.
- [CTVC — CATL's sodium-ion: the prize](#) — May 4, 2026; sodium-ion cells at about \$70–110/kWh against about \$50/kWh for LFP.

SIGNAL 3 OF 5

Natron Energy ceased operations on September 3, 2025 with about \$25 million in orders it could not deliver without further UL certification

HIGH Immediate (0–3 months) · Capital & Corporate Activity · [Review](#)

Natron Energy, a US sodium-ion maker, permanently shut its sites in Holland, Michigan, and Santa Clara, California, with operations ending September 3, 2025. Ninety-five employees lost their jobs. The company said it would not be in a position to deliver on any current or future orders.

REASONING

The closure is reported consistently by ESS News, TechCrunch and CleanTechnica. The cause given is failed fundraising. Natron had orders, but it needed further UL certification to access them and could not secure the working capital to continue. The band is held at High because the event is concrete for any buyer weighing an early-stage sodium-ion supplier. Plant-size figures differ between sources and are left out.

PATTERN

August 27, 2025: Natron's board concluded that its efforts to raise sufficient new funding were unsuccessful, according to ESS News. September 3, 2025: operations ended at the Michigan and California sites and 95 jobs were cut. September 5, 2025: TechCrunch reported about \$25 million in orders for the Michigan factory that could not be delivered without UL certification. CleanTechnica quoted Natron: "We will not be in a position to deliver on any current or future orders."

IMPLICATION

A supplier with orders and a certification record can still fail. For a maker that depends on one cell source, a supplier failure means lost cells, open customer commitments and warranty exposure. Early-stage sodium-ion suppliers carry this risk more than established LFP suppliers do.

RECOMMENDED ACTION

Before you qualify any new sodium-ion supplier, ask for evidence of funding, a named second source for cells, and contract terms for cell replacement or refund if the supplier stops operating. Start the request this quarter with the suppliers already on your list.

SOURCES & WHAT THEY SIGNAL

- [ESS News — US sodium-ion specialist Natron Energy ceases operations](#) — September 3, 2025; closure of Michigan and California sites, 95 jobs, failed fundraising.
- [TechCrunch — Natron's liquidation shows why the US isn't ready to make its own batteries](#) — September 5, 2025; about \$25 million in orders and the UL certification requirement.
- [CleanTechnica — Natron closes its doors](#) — September 5, 2025; Natron's statement that it could not deliver current or future orders.

SIGNAL 4 OF 5

A 25% Section 301 rate on Chinese non-EV lithium-ion batteries and a 55% storage tax-credit sourcing floor apply from 2026, and the rules do not yet say how sodium-ion cells are treated

HIGH Immediate (0–3 months) · Standards, Regulatory & Market Access · **Review**

The Section 301 rate on Chinese non-EV lithium-ion batteries (HTS 8507.60.0020) is 25% for products entered from January 1, 2026. IRS Notice 2026-15 gives a minimum 55% material assistance cost ratio for energy storage that begins construction in 2026 under the section 48E credit. Neither source addresses sodium-ion cells.

REASONING

Both rules are confirmed in primary documents. Neither source names sodium-ion. The tariff text covers lithium-ion batteries, and how sodium-ion cells are classified for duty has not been confirmed. The band is held at High because both rules affect any Chinese-origin cell a customer's project might use, but the status stays at Review until classification is settled.

PATTERN

September 18, 2024: the Federal Register published the Section 301 four-year review modifications, setting the rate for HTS 8507.60.0020 at 25% in 2026. January 1, 2026: the higher rate applied to products entered on or after that date. 2026: Notice 2026-15 states that for energy storage technology beginning construction in 2026, the clean electricity material assistance cost ratio cannot be less than 55%.

IMPLICATION

Your customers claim the storage investment credit, so the sourcing floor reaches your bill of materials through their projects. If you claim 45X on modules, the same cell choice matters to you. A Chinese-origin sodium-ion cell could face a duty and a sourcing test, but the duty treatment is not confirmed.

RECOMMENDED ACTION

Within 30 days, ask customs counsel to confirm in writing the HTS classification and duty rate for any sodium-ion cell you are considering. Then map that cell's origin against the 55% sourcing floor before you offer it on a credit-dependent project.

SOURCES & WHAT THEY SIGNAL

- [Federal Register — Section 301 notice of modification, September 18, 2024](#) — September 18, 2024; 25% rate for HTS 8507.60.0020 for products entered on or after January 1, 2026; sodium-ion is not mentioned.
- [IRS — Notice 2026-15](#) — Example showing a minimum 55% material assistance cost ratio for energy storage beginning construction in 2026.

SIGNAL 5 OF 5

Peak Energy shipped a US sodium-ion storage system to a nine-customer pilot in July 2025 and has said its US factory would open in 2027

MEDIUM Long-term (1–3 years) · Supply & Production Readiness · **Review**

Peak Energy announced the launch and shipment of its sodium-ion battery storage system on July 30, 2025, deployed in a shared pilot with nine utility and independent power producer customers. A July 19, 2024 item on Peak's newsroom said its planned US factory was slated to open in 2027. Both statements are Peak's own.

REASONING

Peak is the one US-based sodium-ion supplier in this set with a shipped system. The evidence is the company's own newsroom. The sources here do not show factory output, pilot performance data or whether cells would be sold to third parties. The band is held at Medium and the status at Review for that reason.

PATTERN

July 19, 2024: Peak's newsroom reported that its planned US giga-scale sodium-ion factory was slated to open in 2027. July 30, 2025: Peak announced the launch and shipment of its sodium-ion storage system, described by Peak as the first grid-scale sodium-ion storage solution deployed to the US electric grid, in a pilot with nine utility and independent power producer customers.

IMPLICATION

A US-based source could ease origin questions on the cells you buy. Peak sells storage systems, so it may be a competitor as much as a cell source. Its factory date is a plan, and plans slip, as the Natron case shows.

RECOMMENDED ACTION

In the next two quarters, ask Peak whether it sells cells or modules to third parties, and ask for the pilot's operating data and its UL 9540 listing status. Do not design a product around its 2027 date until both answers are in writing.

SOURCES & WHAT THEY SIGNAL

- [Peak Energy — Peak Energy delivers first grid-scale sodium-ion battery storage system in the U.S.](#) — July 30, 2025 announcement of the launch, shipment and nine-customer pilot.
- [Peak Energy — newsroom](#) — Lists the July 19, 2024 item stating the planned US factory was slated to open in 2027.

SET UP A SIGNAL ON YOUR QUESTION

A watch on your question runs every cycle.

These signals came from one cycle of a standing watch. Name a company, a market or a regulation, and the watch keeps running whether or not anyone opens the platform. Every signal arrives rated for confidence and horizon, with the dated events behind it and the sources that carry the weight.

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

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