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The Honorable Joseph R. Biden
President of the United States
1600 Pennsylvania Avenue NW
Washington, DC 20500

The Honorable Michael S. Regan
Administrator of the Environmental Protection Agency
1200 Pennsylvania Avenue NW
Washington, DC 20460

Dear President Biden and Administrator Regan,

In light of your recent policy determinations to incentivize rapid electric vehicle (EV) adoption in the United States, we are writing to express our concerns with how these choices will negatively impact our national security given the dominance by the People's Republic of China (China) in EV supply chains.

There is no doubt EVs will play a significant role in diversifying America's transportation systems. Yet we believe your plans will rush our transition to EVs before the infrastructure necessary to support it is in place. This trajectory will only position the U.S. to become more reliant on China for critical minerals and manufacturing that are necessary for the rapid expansion of EV markets this administration envisions. And even more concerning is the fact that this reliance hinges upon China's goodwill to export those minerals and manufactured goods to the U.S. This will undoubtedly open the U.S. up to economic manipulations by China, identical to what Russia is doing with Ukrainian grain exports, and a major threat to our national security. We do not believe now is the time for us to make ourselves vulnerable to such easy political pressures.

Your EV plans go far beyond the provisions of the 2021 infrastructure law and the 2022 Inflation Reduction Act, with regulatory initiatives in the queue that will only intensify America's vulnerability to political interference by the Chinese Communist Party. Last year, the Environmental Protection Agency (EPA) announced a [proposed regulation](#) to establish strict tailpipe emissions regulations on gasoline and diesel-powered vehicles that would force up to two-thirds of new vehicles sold in the U.S. to be electric by 2032.

At a nearly tenfold increase over current electric vehicle sales, this proposed rule is a clear example of tone-deaf policymaking that favors the geopolitical advantages currently held by China in this market. We would be exposing our economy and national security interests if we consciously link America's economic and transportation stability to the enterprise of a country [you yourself described](#) as an economic "ticking time bomb."

Though a deliberate and methodical strategy, China has established a formidable foothold in both the up-and-downstream segments of electric vehicle value chains. [Chinese foreign direct](#)

[investment in the EV market](#) surged more than forty-fold from \$605 million in 2016 to over \$24 billion in 2022.

Currently, China is possessing around 36 percent of the world's known rare earth reserves, controls more than 70 percent of the world's extraction capability and nearly 90 percent of the world's processing capacity. This is significant as EVs use about six times more rare minerals than conventional cars because of the batteries. [China has worked for decades to develop a strategic dominance](#) over these crucial and rare minerals.

Yet because the EPA's proposed rule will mandate more EVs in American garages, it will also effectively mandate greater American household dependence on the cooperation of the Chinese.

The International Energy Agency (IEA) recognized this in July, releasing its inaugural [Critical Minerals Market Review](#). The analysis points out through rigorous and detailed analysis the overwhelming market dominance China holds over critical minerals globally and by that, their control over the projected growing demand, supply, and investment for these materials.

In the downstream, [while the U.S. makes about one percent of the world's battery cathodes, China makes between 73 and 99 percent](#) of those cathodes, depending on the type, while also being the predominant producer of battery separators (74%), battery electrolytes (82%), and battery anodes (92%). All this on top of the fact [Chinese companies, many with direct control by the Chinese Communist Party, are attempting to expand their presence in the U.S. EV battery manufacture and assembly plants and facilities](#).

Importantly, these national security concerns are not theoretical. [On August 1, 2023, China imposed strict curbs on the exports of gallium and germanium](#) – two minerals required in EV batteries – that immediately led to a 43 percent rise in the cost of gallium and 9.1 percent rise in the cost of germanium. It's clear that China's positions in EV battery technology and manufacturing is a challenge we must address before we push ahead with electrification strategies and regulations that will artificially increase EV demand.

Investments – both private and public – separate from Chinese interference is key to combatting their foothold in the EV supply chain and strengthening American competitiveness. This should start with enabling more domestic production with a streamlined, timely, and predictable permitting process. Once our regulatory system is poised to approve new projects, we can better facilitate new ventures and investments that will allow us to begin competing and perhaps eventually supplanting the current Chinese monopoly in this unique, but crucial, market. This would include bypassing the midstream processing (refining, alloying) currently dominated by China.

[Frank Fannon, former U.S. Assistant Secretary of State for Energy Resources succinctly stated](#) the U.S. should “readjust its thinking, reassess its allies and institutions and reinvent economic statecraft”, and that this is the way free nations can “prevent China from using its market power to undercut and bankrupt mining investments at home and abroad.”

In support of U.S. national security and economic stability, we strongly encourage you to consider the current state of play in the global marketplace and pursue domestic investment and infrastructure opportunities before we pursue a rushed EV policy. Your administration can start

by reconsidering the EPA's proposed tailpipe emissions rule, which will further put the U.S. on a precarious path to dependence on China for America's EV supply chain.

Very respectfully,

James "Spider" Marks, Major General, U.S. Army (Ret)

Robert Harward, Vice Admiral, U.S. Navy (Ret)

Mastin Robeson, Major General, U.S. Marine Corps (Ret)

James J. Carey, Rear Admiral, U.S. Navy (Ret)

Thomas Magness, Colonel, U.S. Army (Ret)

Rob Maness, Colonel, U.S. Air Force (Ret)

Michael McKenna, Captain, U.S. Navy (Ret)

Ike Puzon, Captain, U.S. Navy (Ret)

Bob "Shoebob" Carey, Captain, U.S. Navy (Ret)

Andrew "Rocky" Raczkowski, U.S. Army (Ret)

Thomas Duffy, Commander, U.S. Navy (Ret)

Brigham A. McCown, Commander, U.S. Navy (Ret)

Ernesto Hernandez, Major, U.S. Air Force (Ret)

James McCormick, Captain, U.S. Army (Ret)

Sergio de la Peña, Colonel, U.S. Army (Ret)

Bentley B. Rayburn, Major General, U.S. Air Force (Ret)

E.G. "Buck" Shuler, Lieutenant General, U.S. Air Force (Ret)

CC: Jeffrey Zients, White House Chief of Staff

Dr. Lael Brainard, Director of the United States National Economic Council

Jake Sullivan, United States National Security Advisor

Chairman Thomas Carper, Senate Committee on Environment and Public Works

Ranking Member Shelley Moore Capito, Committee on Environment and Public Works

Chair Maria Cantwell, Sen. Committee on Commerce Science and Transportation

Ranking Member Ted Cruz, Sen. Committee on Commerce Science and Transportation

Chairman Joe Manchin, Senate Committee on Energy and Natural Resources

Ranking Member John Barrasso, Senate Committee on Energy and Natural Resources

Chairman Jack Reed, Senate Committee on Armed Services
Ranking Member Roger Wicker, Senate Committee on Armed Services
Chair Patty Murray, Senate Committee on Appropriations
Vice Chair Susan Collins, Senate Committee on Appropriations
Chairman Frank Lucas, House Committee on Science, Space, and Technology
Ranking Member Zoe Lofgran, House Committee on Science, Space, and Technology
Chair Cathy McMorris Rodgers, House Committee on Energy and Commerce
Ranking Member Frank Pallone, House Committee on Energy and Commerce
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Ranking Member Adam Smith, House Committee on Armed Services
Chairwoman Kay Granger, House Committee on Appropriations
Ranking Member Rosa DeLauro, House Committee on Appropriations
Janet McCabe, Deputy Administrator for the U.S. Environmental Protection Agency
Jennifer Granholm, United States Secretary of Energy
John Podesta, Senior Advisor to the President for Clean Energy Innovation
Ali Zaidi, White House National Climate Advisor