

Lucid Strengthens US Supply Chain with New Graphite Material Supply Agreement with Graphite One

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NEWARK, June 4, 2025 - Lucid Group, Inc. (NASDAQ: LCID), maker of the world's most advanced electric vehicles, today announced the signing of a multi-year supply agreement with [Graphite One](#) for American-sourced natural graphite, further strengthening the company's supply chain for American raw materials and resources. Following other recent agreements with Syrah Resources and Graphite One, future Lucid vehicles will increasingly utilize natural and high-performance synthetic graphite materials mined and produced at each company's facilities in the United States as a part of directed supply agreements with the company's battery cell suppliers.

"A supply chain of critical materials within the United States drives our nation's economy, increases our independence against outside factors or market dynamics, and supports our efforts to reduce the carbon footprint of our vehicles," said Marc Winterhoff, Interim CEO at Lucid. "These partnerships are another example of our commitment to powering American innovation and manufacturing with localized supply chains."

Today's multi-year agreement with Graphite One will supply Lucid and its battery cell suppliers with natural graphite, which is expected to begin production in 2028. Graphite One's natural graphite will be sourced from the Graphite Creek deposit north of Nome, Alaska. This agreement builds on last year's announcement with Graphite One to provide Lucid and its battery cell suppliers with synthetic graphite for future vehicles starting in 2028, which will be sourced from Graphite One's proposed active anode material (AAM) facility in Warren, Ohio.

"This agreement complements the deal we struck with Lucid in 2024 - which marked the first synthetic graphite agreement between a U.S. graphite developer and a U.S. EV company," said Anthony Huston, CEO at Graphite One. "We made history then - and we're continuing to make history now as we build momentum for our efforts to develop a fully domestic graphite supply chain, to meet market demands and strengthen U.S. industry and national defense."

Additionally, beginning in 2026, Syrah Resources will also supply natural graphite AAM to Lucid. Under the agreement, Syrah will collaborate with Lucid or its battery suppliers to purchase the materials over a three-year term. Syrah's natural graphite AAM will be sourced from its vertically integrated AAM production facility in Vidalia, Louisiana.

Together, these agreements to source natural and synthetic graphite continue Lucid's focus on strengthening its US-based supply chain and establishing local supply for critical minerals. Graphite, both synthetic and natural, composes a significant amount of the material within Lithium-Ion batteries and is essential for fast-charging performance.

About Lucid Group

Lucid (NASDAQ: LCID) is a Silicon Valley-based technology company focused on creating the most advanced EVs in the world. The award-winning Lucid Air and new Lucid Gravity deliver best-in-class performance, sophisticated design, expansive interior space and unrivaled energy efficiency. Lucid assembles both vehicles in its state-of-the-art, vertically integrated factory in Arizona. Through its industry-leading technology and innovations, Lucid is advancing the state-of-the-art of EV technology for the benefit of all.

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