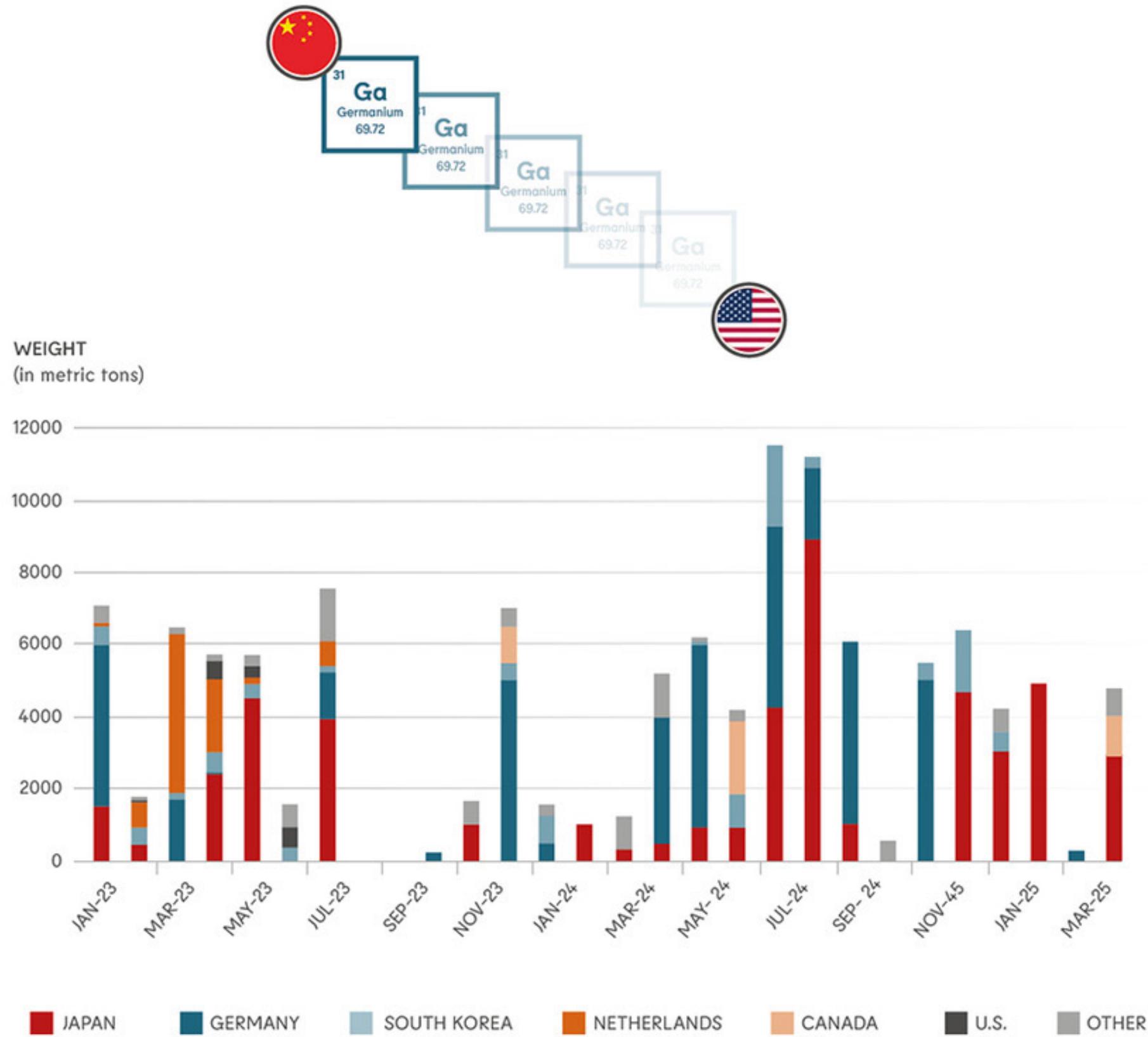


China's Gallium exports: Exports to U.S. completely dried up



Source: China Customs

Weekly Facts & Figures.

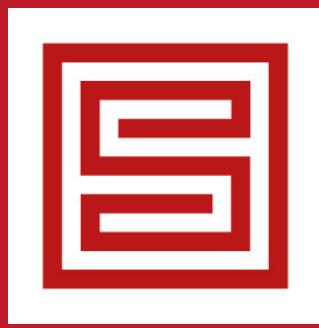
- **U.S. cutoff:** China halted all direct gallium exports to the U.S. after August 2023. Volumes dropped to zero.
- **Licensed exports:** Exports to Germany, Japan, South Korea, and others resumed under license, but disruptions persist.
- **Controls codified:** In December 2024, China formalized its export regime for gallium and germanium.

What This Means.

“This isn’t just a supply chain issue, but rather strategic pressure in action. Businesses are now operating on geopolitical fault lines.”



Jost Wübbeke
Managing Partner



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