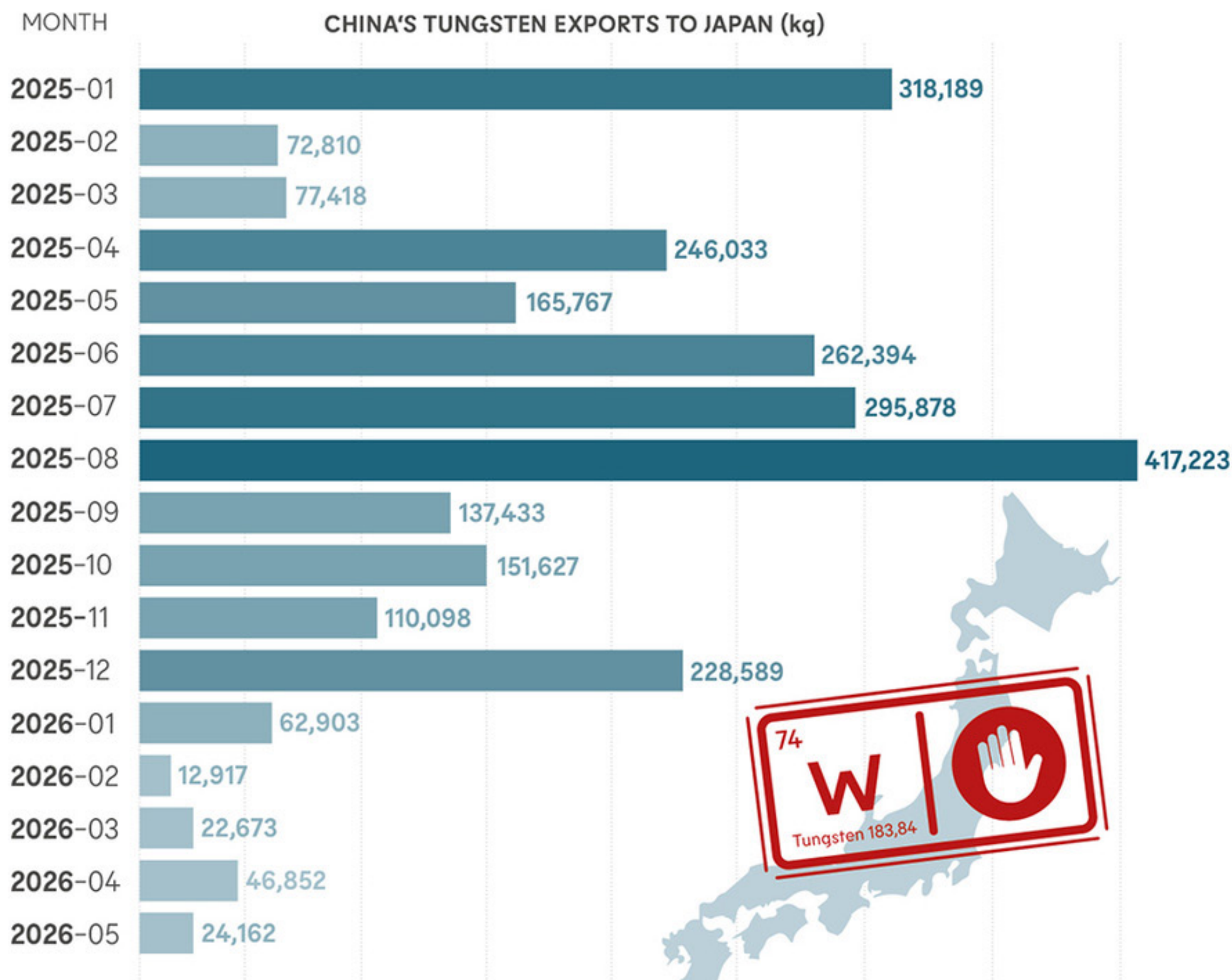


Targeted cut: China halts tungsten exports to Japan



Source: China Customs, Sinolytics research

Weekly
Facts &
Figures.

- **Tungsten exports:** China's tungsten exports to Japan have been near zero since January 2026.
- **Geopolitical trigger:** Beijing's cutoff is linked to deteriorating China-Japan relations.
- **Chip supply risk:** The shutdown of Japan's two WF6 producers will remove roughly 25% of global tungsten hexafluoride supply.

**What
This
Means.**

“The tungsten cutoff is a stark reminder of how quickly geopolitical tensions can translate into tangible economic disruption.”



Karl Heinlein
Consultant

Start the conversation.



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