

Macro Roundup Article

Headline: [China Controls the Supply of Crucial War Minerals](#)

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Tweet: The US is racing to find new suppliers of minerals needed for weapons. Concentrated production, complex refining, and low volumes complicate new supply chains.

Summary: The production of war minerals is extremely concentrated. For each of our 13 war materials, the top three exporters account for more than 60% of global supply. China is the biggest producer, by far, for eight of these minerals; Congo, a troubled mining country, tops the ranking for another two; Brazil, a more reliable trading partner, produces nine-tenths of the world's niobium, though most of it is sent to China. Many minerals are impossible to replace in the near term, especially for cutting-edge military uses. When substitution is possible, performance usually suffers. The combination of concentrated production, complex refining, and critical uses means trading happens under the radar. All this makes building new supply chains much more difficult.

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