

China's Gallium Resources Export Report 2023-2032

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Abstracts

On July 3, 2023, China's Ministry of Commerce and the General Administration of Customs issued a proclamation. This proclamation, approved by the State Council of the People's Republic of China, announced the imposition of export controls on gallium and germanium-related items to safeguard national security and interests. These measures are set to take effect from August 1, 2023. Export operators found in violation, whether by exporting without authorization, exceeding the scope of authorization, or committing other infractions, will face administrative penalties or potential criminal liability in accordance with the law.

Gallium, often referred to as the 'backbone of the electronics industry,' plays a pivotal role in both the semiconductor and solar cell sectors, with a steadily growing demand. Gallium finds application not only in gas sensors and solar cells but also in rare earth permanent magnet materials. Additionally, it contributes to the production of compound semiconductors like gallium arsenide and gallium nitride.

China boasts significant reserves of both gallium and germanium. Reports indicate that China's gallium reserves total approximately 190,000 tons, constituting around 80% of the world's gallium reserves, thereby ranking China as the leading global provider. These reserves are typically found in conjunction with lead and zinc minerals.

In 2022, China's primary gallium production amounted to approximately 606 tons, with an annual consumption of roughly 500 tons. CRI's analysis reveals that China's gallium resources are primarily located in large coal mines in Jungar, Inner Mongolia; Panzhihua-style vanadium-titanium magnetite deposits in Sichuan; and bauxite deposits in Guangxi, western Henan, and Guizhou. Notably, Aluminum Corporation of China (Alcoa) stands as the foremost player in China's aluminum industry and serves as the largest producer of gallium resources within the country. Alcoa's production of gallium metal reached 146 tons in 2022.

Examining the export trends from 2018 to 2022, China's gallium resources experienced an overall decreasing trend. However, in 2022, there was a resurgence, with gallium resources exports reaching approximately 94,400 tons, marking a 24.9% year-on-year increase. The export value also rose significantly, reaching about \$35.8 million, reflecting a 43.6% year-on-year increase. Despite these gains, China's gallium resources export volume in 2022 remained below the 2018 levels.

In the first half of 2018-2023, the average price of China's gallium resources exports showed a general trend of first decreasing and then increasing. Between 2018 and 2022, the average price of China's gallium resources exports increased from US\$ 268 per kg to US\$ 379 per kg. However, in January-June 2023, the average price dipped to approximately US\$318 per kg.

China exported gallium resources to 10 countries and regions worldwide in 2022-2023. CRI's analysis highlights Japan, the Netherlands, Germany, South Korea, and Canada as the primary destinations for China's gallium resource exports in terms of export value. Among these, Japan emerged as the leading recipient in 2022, with China exporting around 35,700 tons of gallium resources to Japan, accounting for 37.8% of China's total gallium resources exports that year. The export value to Japan reached approximately \$14.7 million, representing 46.6% of the total export value.

As the world's leading producer of gallium resources, China's decision to impose export restrictions effective from August 1, 2023, is expected to lead to a significant decline in both export volume and export value of gallium resources in 2023 compared to 2022.

Topics covered

Export Status and Main Sources of Chinese Gallium Resources, 2018-2022

Key Drivers and Market Opportunities for China's Gallium Resources Exports

What are the key drivers, challenges and opportunities for China's Gallium resources exports during the forecast period 2023-2032?

Which are the key players in the Chinese Gallium resources export market and what are their competitive benchmarks?

What are the expected revenues from the Chinese Gallium resources export

market during the forecast period of 2023-2032?

What strategies have been adopted by the key players in the market to increase their market share in the industry?

Which segment of the Chinese Gallium resources export market is expected to dominate the market by 2032?

What are the competitive advantages of the key players in the Chinese Gallium resources export market?

What is the impact of COVID-19 on China's Gallium resource exports?

What are the main constraints inhibiting the growth of China's Gallium resource exports?

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