

Beijing's critical raw material weapon

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Résumé ou extrait : In 2025, China showed how control over critical raw materials can reshape global power. By tightening and calibrating exports, Beijing disrupted supply chains, raised production costs and exposed the dangers of deep dependencies across Europe, the United States and beyond. What began as retaliation against Washington has evolved into a geo-economic weapon used to gather intelligence, reinforce China's industrial dominance, and coerce and deter those who act against Beijing's 'core interests'. This Chaillot Paper shows how these measures advance the country's larger ambitions: to insulate China from external shocks through the pursuit of industrial self-sufficiency, while preserving its access to global markets, and further isolating Taiwan". It charts the risks for Europe's security and prosperity, and sets out urgent steps to diversify supply, strengthen deterrence and regain leverage – before these dependencies deepen further and cause even greater economic damage.

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