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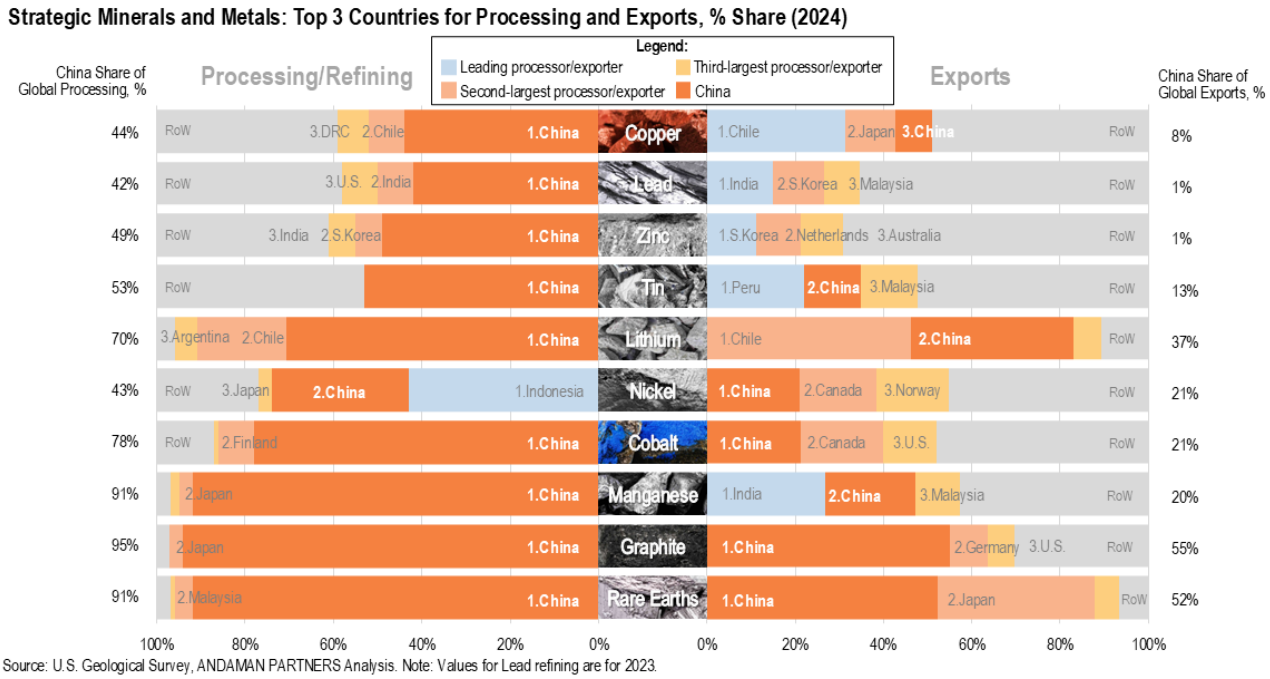
Nexus of the Mining World: China's Share of Global Processing and Exports of Strategic Minerals and Metals

China is the world's leading processor of nearly all minerals and metals, and is the top exporter of several critical minerals, underscoring its pivotal role in global supply chains.



Source: U.S. Geological Survey, ANDAMAN PARTNERS Analysis. Note: Values for Lead refining are for 2023.

Compared to China's share of global reserves and production of strategic minerals and metals, China's share of processing and exports is even more stark. China dominates global mineral and metal processing, accounting for the majority share of refining capacity for key materials such as rare earths, lithium, cobalt, graphite and tungsten.

China also holds a leading position as an exporter of several of these refined products, which form the foundation of modern industries ranging from electronics to electric vehicles and renewable energy.

Over several decades, China has invested heavily in smelting, refining and processing capacity, positioning itself as the global hub where raw materials from Africa, Latin America and elsewhere are transformed into higher-value inputs.

For example, more than 60% of the world's cobalt is mined in the Democratic Republic of Congo, yet almost 80% of cobalt refining occurs in China. Similarly, China processes 70-90% of the world's lithium, manganese, graphite and rare earths, even though much of the raw extraction occurs abroad. This concentration gives China leverage over critical stages of supply chains that are essential to high-tech manufacturing and the transition to clean energy.

China is also a major exporter of refined minerals and metals. It accounts for more than half of global exports of rare earth oxides and magnets, as well as processed materials like graphite anodes for batteries. This makes downstream industries worldwide — from electric vehicle manufacturers in Europe to electronics firms in East Asia — reliant on Chinese supply.

As the nexus of the mining world, China's role cannot be replicated or replaced in the short term, and global supply chains are both enabled and constrained by the country's centrality in mineral processing and exports.

Also by ANDAMAN PARTNERS:

- Engine of Global Trade: The Rise and Global Impact of China's Exports
- China's Comprehensive Role in Global Resources – Q4 2025
- Nexus of the Mining World: China's Share of Global Reserves and Production of Strategic Minerals and Metals

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