

Analyzing Conflicting Reports of a Rare Earths Technology Ban by China

written by Steve Mackowski | April 10, 2023

Dynamic Reading – Is this the prodigy of today's AI Report Writing phenomenon? I have been asked to write my thoughts on the latest news about potential rare earths technology bans from China. The first reference I received was written by Shunsuke Tabeta, a staff writer for Nikkei Asia: [China weighs export ban for rare-earth magnet tech](#)

The second reference I received was written by Jingyue Hsiao of DIGITIMES Asia, Taipei. This was in response to the Nikkei Asia news: [A rare earth war simmers as China reportedly to impose export ban](#)

I then received the preparatory title of a response from one of the InvestorIntel journalists: "[What happens next if China bans rare earths technology needed to process rare earths and to make high-performance magnets](#)".

Lessons from the past

Got me thinking about how people's reading styles, capabilities, and mental processes appear to be controlling how they understand the reading matter and therefore influence the way they report or comment. Reminded me of a few years back when my granddaughter wasn't achieving at high school.

I purchased National Geographic subscriptions for us both and commenced a weekly telephone hook-up routine. We took turns investigating each article, with one being the interviewer

developing the questions and the other, being the interviewee who had to answer the questions. Who, What, When, Where? With those satisfactorily answered you could then ask the key question: Why? Look at what this does. It focuses the mind to search for factual information BEFORE you look for answers that may be swayed by things such as bias, agendas, or less well-informed previous interactions. It also aids in memory retention.

Unpacking the articles

Look at the Nikkei headline: “export ban”. The DIGITIMES headline reads: “Rare earth war”. The InvestorIntel “What happens next”. These all point to and highlight the differences in the author’s history, experience, and understanding of the topic or their editorial bent.

I thought back and my favorite primary school teacher came to mind. She used these Who, What, When, Where, and Why prompts when I was learning to read. No, not read but understand. So Mrs. long-since-forgotten surname, thank you for your skills. But, I’ll lay claim to the Dynamic Reading title. BTW, it’s about now I’m expecting some hi-tech whiz kid to jump in and say that this tool is similar but opposite to the AI report writers that aggregate multi-article “Who, What, When, Where, and Why” information. Strange place the past!

So I’ll use Dynamic Reading to get to my response to the articles.

	Nikkei Asia (Japanese)	DIGITIMES Asia (Taiwanese)
Who	China. Un-named Beijing Officials	China

	Nikkei Asia (Japanese)	DIGITIMES Asia (Taiwanese)
What	Considering prohibiting exports of certain rare earth magnet technology	China had updated a technology export restriction list which may ban the exports of certain rare earth elements
When	Later this year	Later this year
Where	Beijing	Beijing

What is really being written

Note already the difference in the What. Banning Rare earth magnet technology versus Rare earth elements. So, do I have enough to comment? To provide a Why? Well, not from that information, I need more.

The DIGITIMES Asia article cites Quartz as reporting that China is trying to defend its dominance in rare earths by increasing investments at home and abroad. This position is not supported by the Off-Market Sale of the East China Exploration (ECE) Group of their holdings in Arafura Resources Ltd. (ASX: ARU). Especially since Arafura is well progressed on its Nolans Project development schedule. And then Lynas Rare Earths Ltd. (ASX: LYC) is very well developed on their North American value-adding schedule.

To be honest, I have always had difficulty in developing an overview of how China aggregates and controls the Rare Earth business in China. Although the quotas and technology strategies appear to be working well on paper (their paper), it is not without some resistance from the regions that want more self-governance over their resources. Go no further than looking at the resource development battle between the light rare earths in Baotou, the heavy rare earths in Guangzhou, and the historic

separation plants around Nanjing.

My conclusions

My take? Well, I would question: Is the news real or not? Is it part of a grander plan? I am sure that China can see the many developments occurring outside of China. And I am sure that China sees the projected growth in rare earths that are needed and coming from developing towards a Net Zero Carbon future. And I am sure that China must acknowledge that its pre-eminent position is not so much as under threat but that it will lessen as the whole of the world looks to resource development for a global benefit.

So, my feelers are out for more information. Difficult though these days and especially now that TikTok bans are muddying the relationships. Let's just hope for everyone's future that China's People's Liberation Army ("PLA") venture into the Straights of Taiwan is not on, or part of, any strategic China agenda.

Oh, my granddaughter? She went from the bottom quartile of her class to be in the top 10%. And is now running her own business. Simply by being taught how to read.