

U.S. Rare Earth Magnet Imports from China Surge Following Trade Breakthrough

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U.S. imports of rare earth magnets from China rebounded sharply in June, with shipments increasing by more than 660% compared to May 2025. The dramatic increase signals renewed momentum in trade relations and marks a crucial shift for American manufacturers relying on critical materials for electric vehicles (EVs), defense technology, and renewable energy infrastructure.

According to data from China's General Administration of Customs, the country exported 353 metric tons of rare earth permanent magnets to the United States in June. This surge follows a series of agreements between Washington and Beijing aimed at easing tensions around mineral exports. These negotiations helped resolve delays caused by earlier Chinese export license restrictions.

China, the world's dominant supplier of rare earth magnets, accounting for over 90% of global output, had previously tightened controls in April, adding certain rare earth magnet-related materials to its export licensing list in response to U.S. trade measures. That move led to immediate supply chain disruptions, with automakers outside of China temporarily halting some production due to a lack of access to critical components.

Although June's rare earth magnet exports totaled 3,188 tons globally, a 157.5% increase over May, the figure remains 38.1% lower compared to June 2024. Analysts anticipate continued recovery through July as more Chinese exporters have now obtained the necessary licenses to resume full-scale shipments.

For the first half of 2025, China's rare earth magnet exports dropped 18.9% year-over-year to 22,319 tons. Nonetheless, the recent spike in U.S.-bound exports is seen as a stabilizing sign for industries dependent on these essential materials. With rising domestic interest in reshoring and diversifying supply chains, the U.S. remains strategically focused on reducing long-term reliance on Chinese rare earths while continuing to secure near-term needs through pragmatic trade diplomacy.