OECD Inventory of Export Restrictions on Industrial Raw Materials 2025

Monitoring the Use of Export Restrictions Amid Growing Market and Policy Tensions

May 2025

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MONITORING THE USE OF EXPORT RESTRICTIONS AMID GROWING MARKET AND POLICY TENSIONS

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1 International trade in industrial raw materials and export restrictions

Key messages

- Export restrictions on industrial raw materials increased more than fivefold between 2009 and 2023, with an acceleration in 2023 that saw a more than doubling of the growth rate compared to 2022.
- The rise in export restrictions in 2023 coincided with surging raw material prices due to the Russian Federation's war of aggression against Ukraine and escalating geopolitical tensions.
- In 2023, seven countries— The People's Republic of China, Viet Nam, Burundi, the Russian Federation, Democratic Republic of the Congo, Zimbabwe, and Laos—accounted for 94% of new export restrictions.
- In view of global interdependency, export restrictions risk disrupting supply chains and understanding their impact is crucial to identifying less restrictive alternatives that would balance security and development goals.

Minerals are essential to security and prosperity. They are critical to renewable energy, digitalisation, and defence. For instance, an electric vehicle requires six times more mineral inputs than a conventional car, and an onshore wind plant needs nine times more minerals than a gas-fired plant IEA (2024[1]). Minerals are also vital for semiconductors, fibre optics, superalloys, permanent magnets, and advanced electronics.

Yet, mineral extraction and processing are highly concentrated geographically and in ownership. This is due to a mix of natural endowments, economic viability, economies of scale, and policy choices. The top three producing countries account for over two-thirds of the global production of cobalt and nickel, and over 90% of rare earth elements and lithium. China alone produces around 70% of the global supply of germanium, graphite, rare earths, and magnesium. Even where deposits are widespread, mining and processing require long-term investment and face lengthy approval processes.

This concentration, combined with rising demand, is intensifying pressure on the global exchange of raw materials. The green and digital transitions, as well as economic and military security concerns, are also increasing demand. These developments are unfolding amidst growing geopolitical tensions and strategic rivalries.

This has led to more assertive management of raw materials by governments. Although this sector has long been shaped by state intervention through regulations, state ownership, subsidies, and trade measures the OECD Inventory on Export Restrictions on Industrial Raw Materials (hereafter “Inventory”) shows a significant increase in their use over the last decade.

Export restrictions take many forms and pursue diverse objectives, including the promotion of domestic processing, protection of the environment, attracting investment, and raising public revenue. However, the effectiveness of such restrictions in achieving sustainable development goals is contested. Moreover, restrictions by one country often trigger similar actions by others—creating a cycle of rising prices and reduced global supply.

The sharp increase in export restrictions in 2023 may mark the start of a new phase. The latest OECD Inventory data, supported by media and policy reports, points to a rapid acceleration in such measures. This trend could signal a broader shift in how countries manage critical raw materials.

The OECD has tracked export restrictions since 2009. The Inventory is updated annually and provides detailed data on the incidence, type, scope, and evolution of export restrictions across countries and products. The current update covers 2009–2023, with the next release due in 2026 (covering data through 2024).

2 Key trends in the use of export restrictions up to 2023

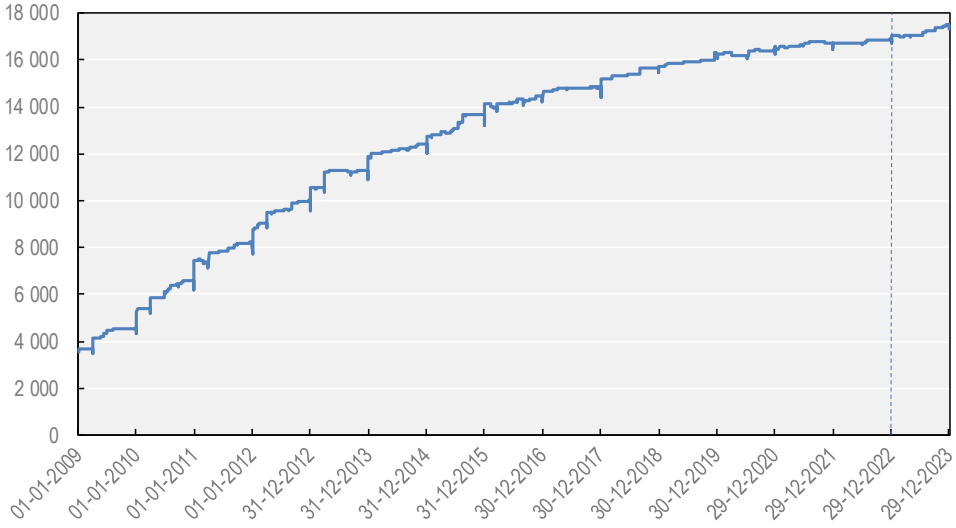
Between 2009 and 2023, export restrictions on industrial raw materials increased more than fivefold, with the most significant increases occurring in the early 2010s, when the OECD began regularly collecting data and monitoring these measures amid growing policy tensions.[1]

In 2023—the final year covered by this edition of the Inventory—the pace of growth in the use of export restrictions accelerated. By the end of the year, approximately 3.4% more raw material products were subject to at least one export restriction measure compared to the end of 2022. The growth rate in the number of such products was more than double that of 2022 and nearly triple that of 2021 (Figure 2.1).

Among other factors, the marked increase in the growth rate of export restrictions in 2023 coincided with a significant rise in raw material (and energy) prices following Russia's invasion of Ukraine in 2022 (Figure 2.2), as well as escalating geopolitical tensions.

Figure 2.1. Export restrictions increased fivefold over 2009-23

Number of exported raw material products subject to at least one export restriction measure

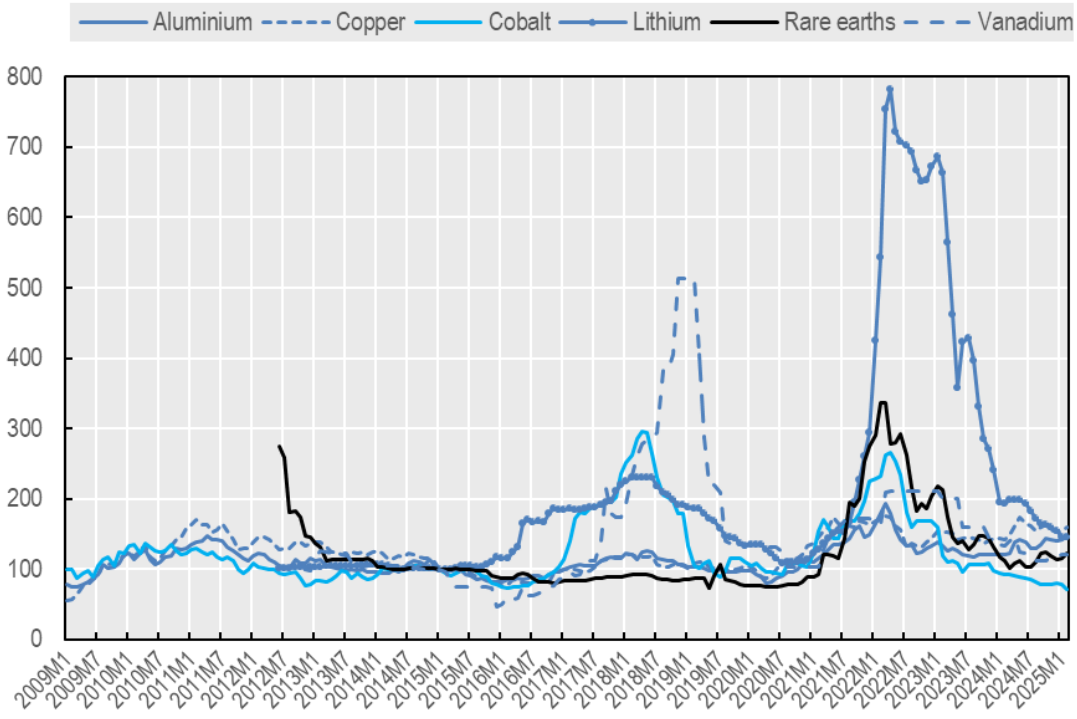


Note: The count of all types of measures in place across all covered raw materials and all implementing countries, taking into account the stock of measures in place at the beginning of the period, as well as new additions and eliminations.
Source: OECD Inventory on Export Restrictions on Industrial Raw Materials (OECD, 2025[2]).

[1] See, for example, OECD (2024[5]) for the case study of exports of rare earths from China to Japan in 2010-2011.

Figure 2.2. 2022 and 2023 marked a significant spike in prices of raw materials

Monthly prices of selected raw materials, index 2015=100



Source: IMF's Primary Commodity Price System.

Close to 94% of net additions to the global stock of exported products subject to export restrictions in 2023 were accounted for by just seven countries. The People's Republic of China (hereafter "China"), Viet Nam, and Burundi each contributed approximately 21% each, followed by the Russian Federation (hereafter "Russia") (14%), the Democratic Republic of the Congo (hereafter "DRC") (7%), Zimbabwe (6%), and the Lao People's Democratic Republic (2%).[2]

Most of the new export restrictions imposed by China, Viet Nam, Burundi, and Russia were introduced as tax reforms and took the form of new export taxes or revised tax rates on a range of raw materials. In the DRC and Zimbabwe, the new measures also applied to several raw materials, but took the form of export prohibitions. These were justified in the relevant legislation by strategic considerations and the need to promote local processing (Figure 2.3).[3]

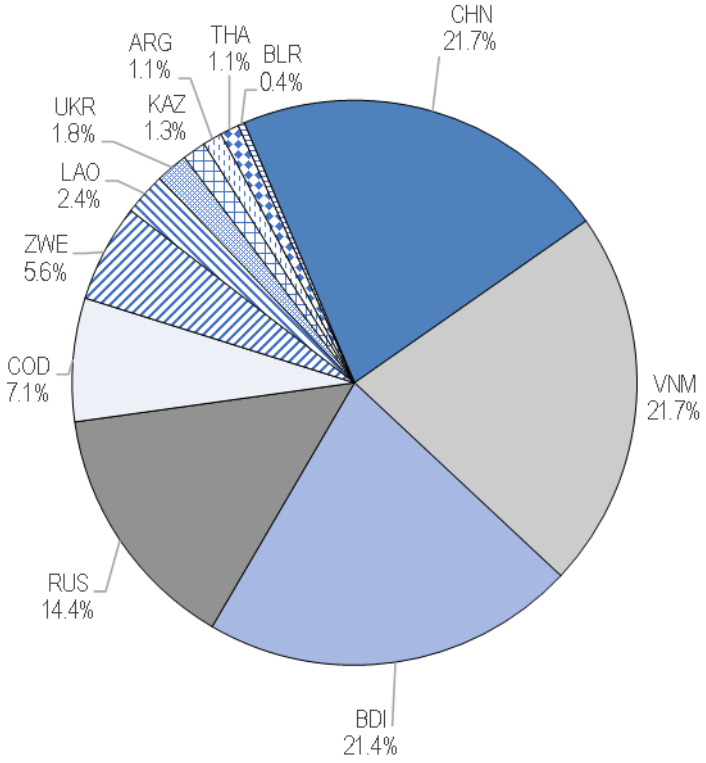
Across all new export restrictions introduced in countries covered by the Inventory, several raw materials saw a global increase in export restriction incidence of more than 10% (Figure 2.4).

[2] These statistics refer to net additions in the period 31/12/2022 to 30/12/2023 to account for the fact that in some countries some measures introduced during the course of the year are by law withdrawn on the last day of the year and reinstated in the first year of the following year.

[3] Note that this description summarises the stated objectives of these new policies as declared in the relevant official legislation or government acts. In practice, an export tax, in addition to generating government revenue, can have similar effects on domestic prices and incentives to process locally that are similar to those of export prohibitions or quotas.

Figure 2.3. A handful of countries account for the bulk of net additions to the global stock of export restrictions in 2023

Countries with the largest number of new measures in 2023



Note: Data refer to net additions in the period 31/12/2022 to 30/12/2023, to account for the fact that in some countries some measures introduced during the course of the year are by law withdrawn on the last day of the year and reinstated in the first year of the following year.
Source: OECD Database on Export Restrictions on Industrial Raw Materials (OECD, 2025[2]).

By the end of 2023, waste and scrap products faced the highest incidence of export restrictions. This reflects both environmental concerns regarding the export of such materials for disposal and a growing interest in leveraging the circular economy as a source of supply for certain metals and minerals (Figure 2.5).[4]

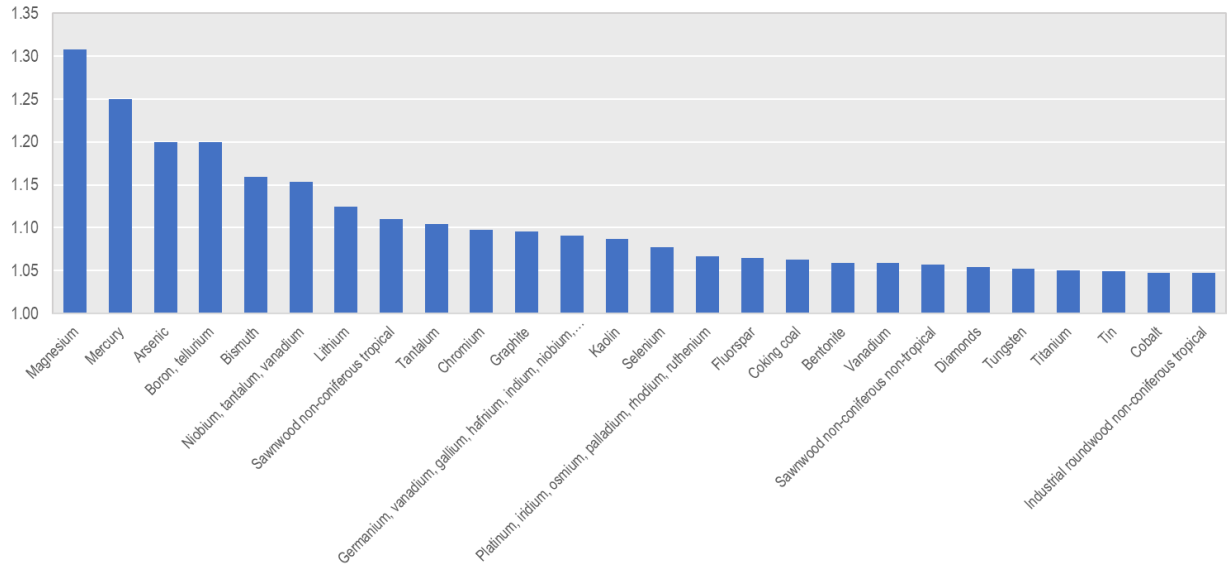
Export restrictions on ores and minerals—essentially the raw materials located upstream in critical raw material supply chains—increased more rapidly than those in other segments of the supply chain, and nearly twice as fast as the overall average for all restrictions (centre panel of Figure 2.5). This trend correlates with the high and rising concentration of production, imports, and exports in the upstream segments of the supply chain. It is also broadly aligned with the policy rationale of supporting domestic downstream industries by limiting the export of upstream products.[5]

[4] That said, these policies may disadvantage foreign users and may be sub-optimal from a global point of view as they may prevent recycling in potentially more efficient foreign locations and undermine the wider deployment of recycling technologies. Moreover, trade in waste and scrap can be essential to achieve the economies of scale needed to make the circular economy viable.

[5] For more information, see Kowalski and Legendre (2023[4]).

Figure 2.4. For some materials the global incidence of export restrictions increased by more than 10%

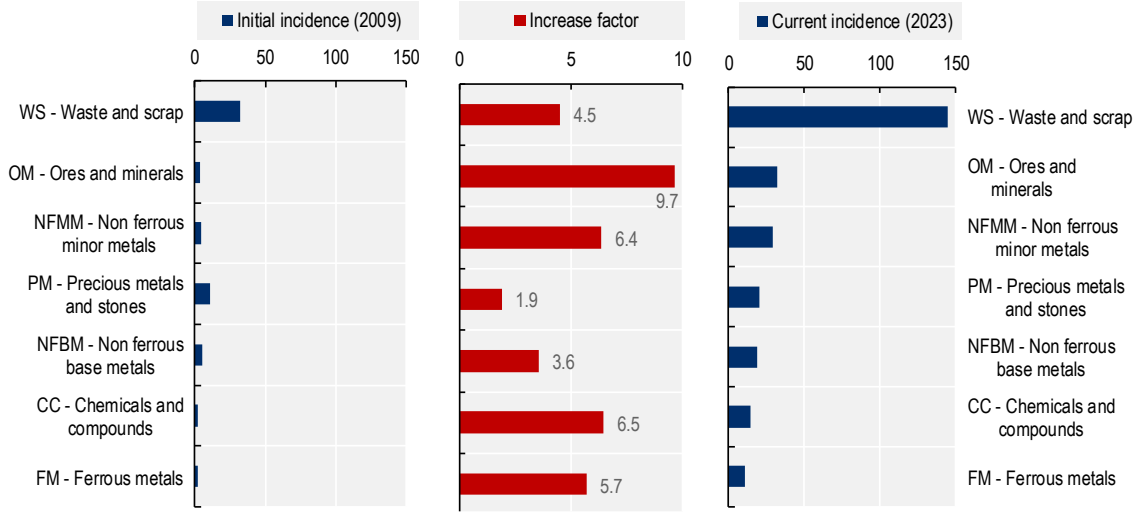
Factor increase between 2022 and 2023 of the incidence of export restrictions across critical raw materials



Note: *The scaled incidence is the number of export restrictions recorded for the product divided by the number of HS codes that describe that product. Products are ordered by factor increase between 2022 and 2023. Increase factor = scaled count of measures in place in December 2023 / scaled count of measures in place in January 2022.
Source: OECD Database on Export Restrictions on Industrial Raw Materials (OECD, 2025[2]).

Figure 2.5. Waste and scrap products and ores and minerals face the highest incidence of export restrictions

Initial scaled (per HS code) incidence of export restrictions by sector, increase factor, and current scaled incidence

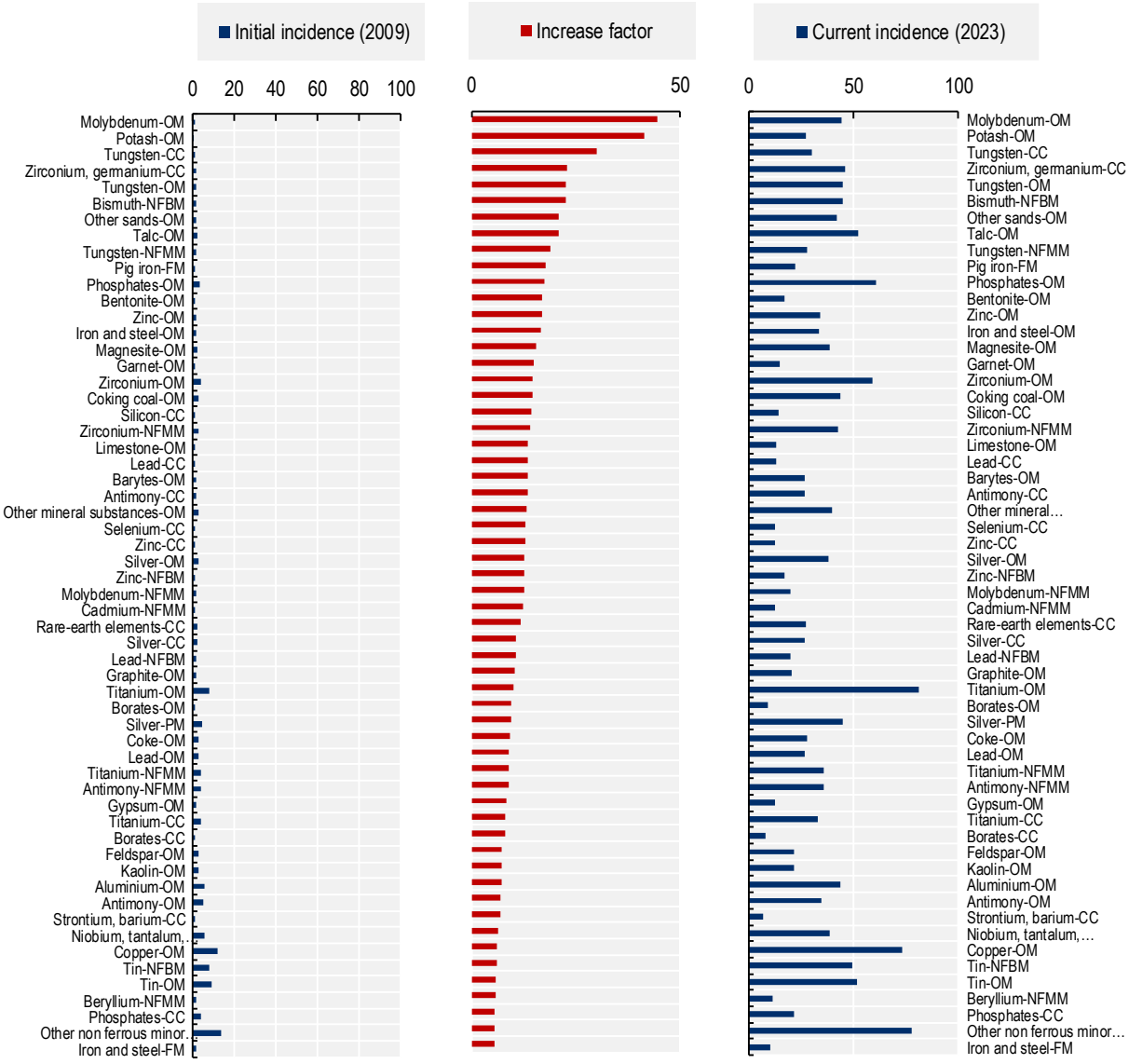


Note: The scaled incidence is the number of export restrictions recorded for the product divided by the number of HS codes that describe that product category. Products are ordered by the scaled incidence in 2020. Increase factor is calculated as the ratio of the scaled count of measures in place in December 2023 and the scaled count of measures in place in January 2009. Products are ordered by the current incidence of export restrictions.
Source: OECD Database on Export Restrictions on Industrial Raw Materials (OECD, 2025[2]).

Among non-waste and scrap industrial raw materials, molybdenum, potash, tungsten, zirconium, and germanium saw some of the steepest increases in the incidence of export restrictions. Products such as manganese, titanium, zirconium, germanium, copper, and other non-ferrous minor metals—including vanadium, gallium, hafnium, indium, niobium, and rhenium—recorded the highest overall levels of export restriction incidence in 2023 (Figure 2.6).

Figure 2.6. Some products have experienced a sharp increase in export restrictions

Initial scaled (per tariff line) incidence of export restrictions by product-sector*, increase factor**, and current scaled incidence



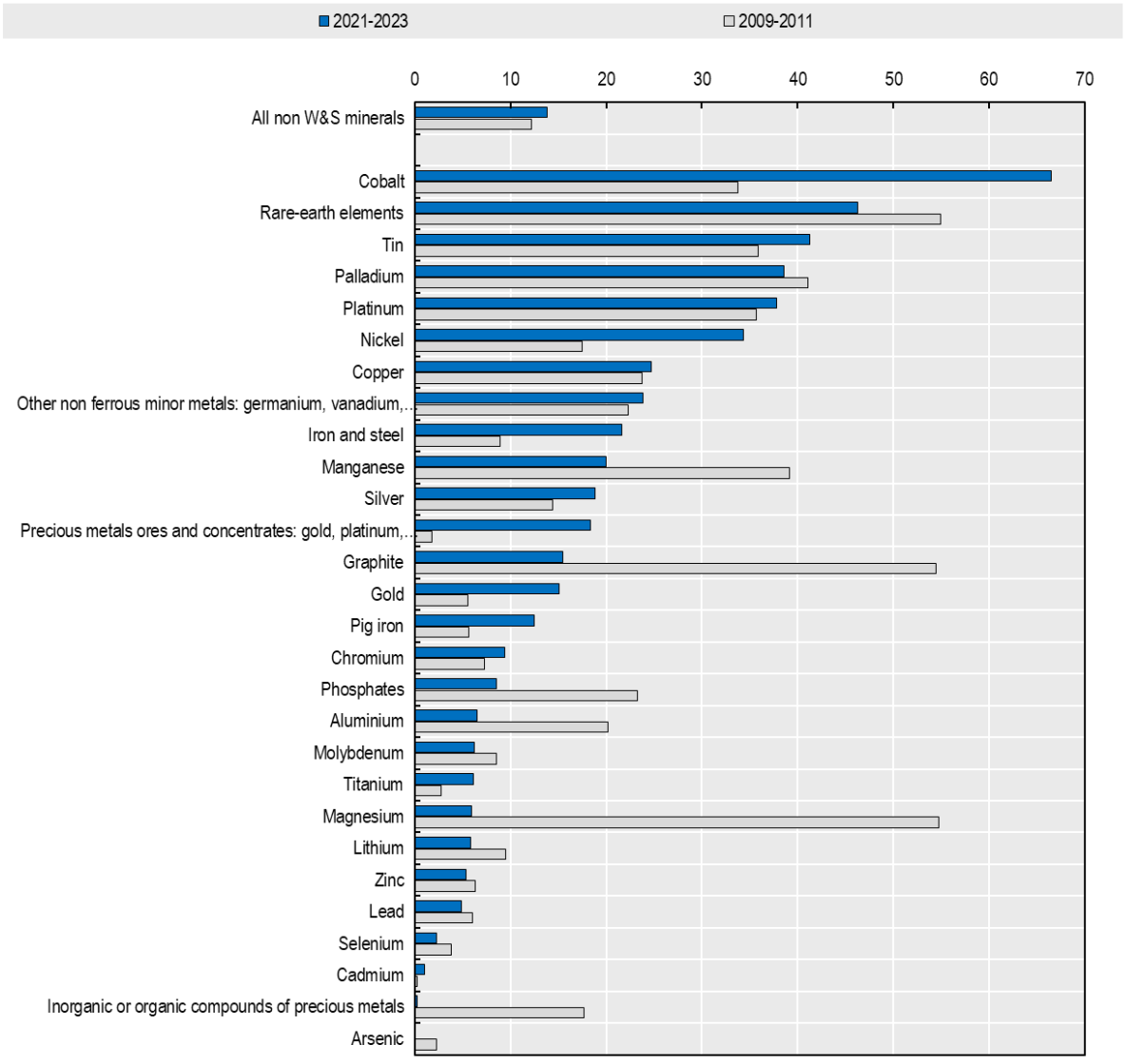
* Note that all specific HS6 raw material products are classified into the following 'sectors' which aim to capture the different stages of processing or types of products : PM – precious metals and stones; OM – ores and minerals; CC- chemicals and compounds; NFMM – non-ferrous minor metals; NFBM – non-ferrous base metals; WS – waste and scrap; FM- ferrous metals.
** Only non-waste and scrap sectors with above average (5.17) increase factors for the period 2009-2022 are shown.
Source: OECD Database on Export Restrictions on Industrial Raw Materials (OECD, 2025[2]).

Between 2021 and 2023, approximately 14% of global trade in non-waste and scrap industrial raw materials was subject to at least one export restriction measure, up from 12% in the 2009–2011 period. During 2021–2023, more than 20% of global exports of cobalt, rare earth elements, tin, palladium, platinum, nickel, copper, iron and steel, manganese, silver, and other precious metal ores faced at least one export restriction.

For certain minerals, the shares were significantly higher—for example, 67% for cobalt and 46% for rare earth elements. In some cases, such as cobalt and nickel, the share of global trade affected by export restrictions nearly doubled between 2009–2011 and 2021–2023 (Figure 2.7).

Figure 2.7. More than 20% of trade in certain key minerals for the green transition faced at least one export restriction over 2021-23

Share in global exports of a given mineral (%) facing at least one export restriction



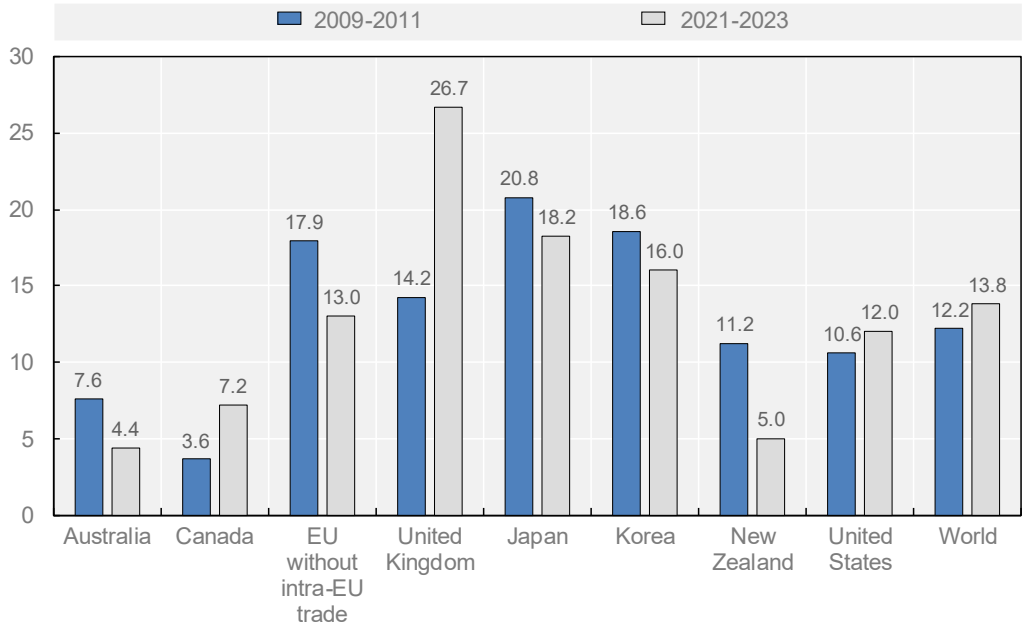
Source: OECD Database on Export Restrictions on Industrial Raw Materials (OECD, 2025[2]) and BACI database.

When trade subject to at least one export restriction is expressed as a share of a country's raw material imports, it becomes clear that some countries face significantly more export restrictions than others. For some countries, this share increased between 2009–2011 and 2021–2023, while for others it declined (Figure 2.8).

Increases typically reflect a combination of two factors: a growing concentration of imports from trade flows already subject to relatively high levels of export restrictions, and a rising incidence of restrictions on existing flows (across both products and partner countries). Conversely, decreases tend to result from a shift away from trade flows with high restriction incidence, as well as a decline in restrictions affecting existing flows.

Figure 2.8. Some countries are facing significantly more numerous export restrictions on their imports of raw materials

Share of import facing at least one restriction by country



Source: OECD Database on Export Restrictions on Industrial Raw Materials (OECD, 2025[2]) and BACI database.

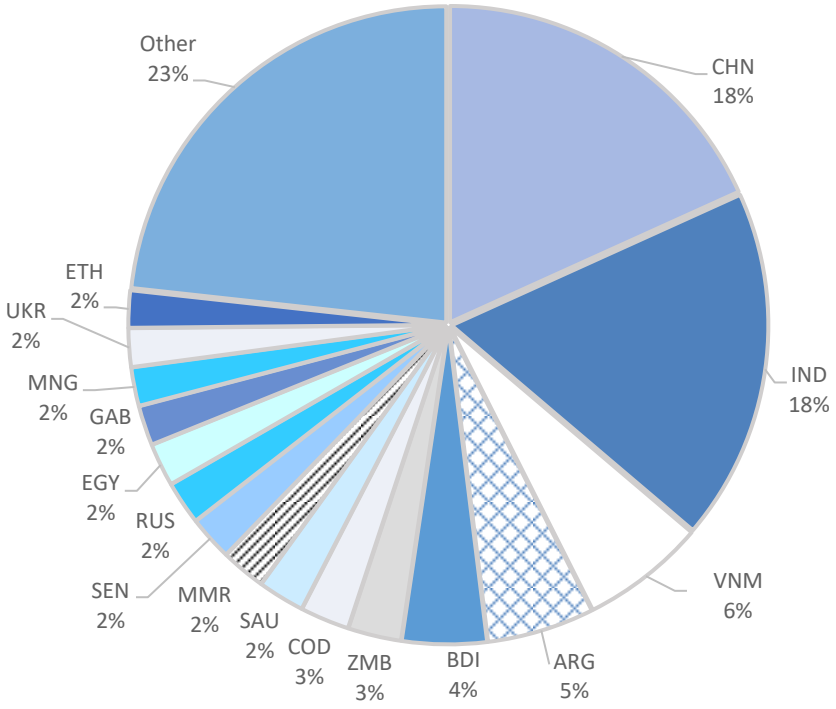
China, India, Viet Nam, Argentina, and Burundi were the top five countries in terms of the number of new export restrictions introduced between 2009 and 2023, together accounting for more than half of all measures implemented during this period (Figure 2.9).

Export taxes and licensing requirements contributed the most to the growth of the global stock of export restrictions between 2009 and 2023. These were also the two most frequently used types of restrictions in 2023. This aligns with the fact that, under WTO rules, quantitative export restrictions are generally prohibited, whereas export taxes and licensing requirements are not.[6]

[6] For more information, see Kowalski and Legendre (2023[4]).

Figure 2.9. Five countries accounted for more than half of the new restrictions introduced over 2009-2023

Country shares in the increase in the total number of export restriction measures between 2009 and 2023



Note: Data refer to net additions in the period 01/01/2009 to 30/12/2023 (and not 31/12/2023, to account for the fact that in some countries some measures introduced during the course of the year are by law withdrawn on the last day of the year and reinstated in the first year of the following year.
Source: OECD Database on Export Restrictions on Industrial Raw Materials (OECD, 2025[2]).

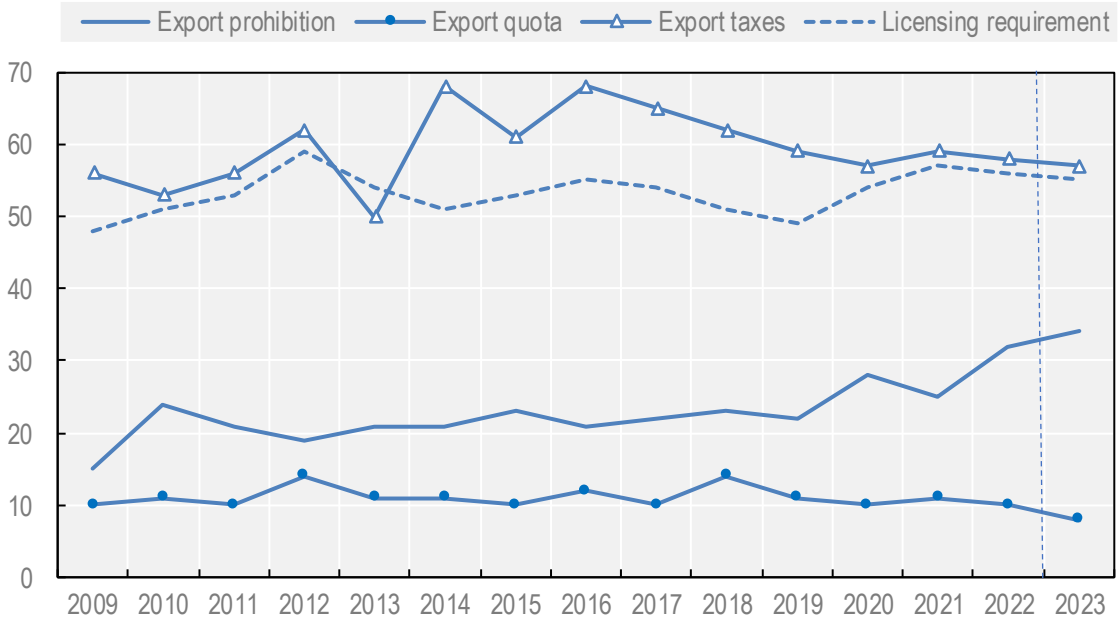
However, the use of quantitative export restrictions—such as export prohibitions and quotas—has also been on the rise, particularly in recent years. Notably, the incidence of export prohibitions, the most restrictive form of export restriction, has increased significantly since 2019 (Figure 2.10). In fact, they were the most frequently introduced type of restriction in 2022 and the second most frequently introduced in 2023 (Figure 2.11).

For measures where information on the officially stated purpose of export restrictions is available, revenue generation was the most frequently cited purpose in 2023—and it has been the fastest-growing stated purpose since the early 2010s.

Three purposes related to industrial policy—safeguarding domestic supply, promoting further processing/value addition, and protecting local downstream industries—also appeared to grow somewhat in importance over this period. However, together they accounted for only about 10% of all new measures in 2023, down from 17% in the previous year.

Figure 2.10. While export taxes and quotas are the most common measures, export prohibitions have increased in recent years

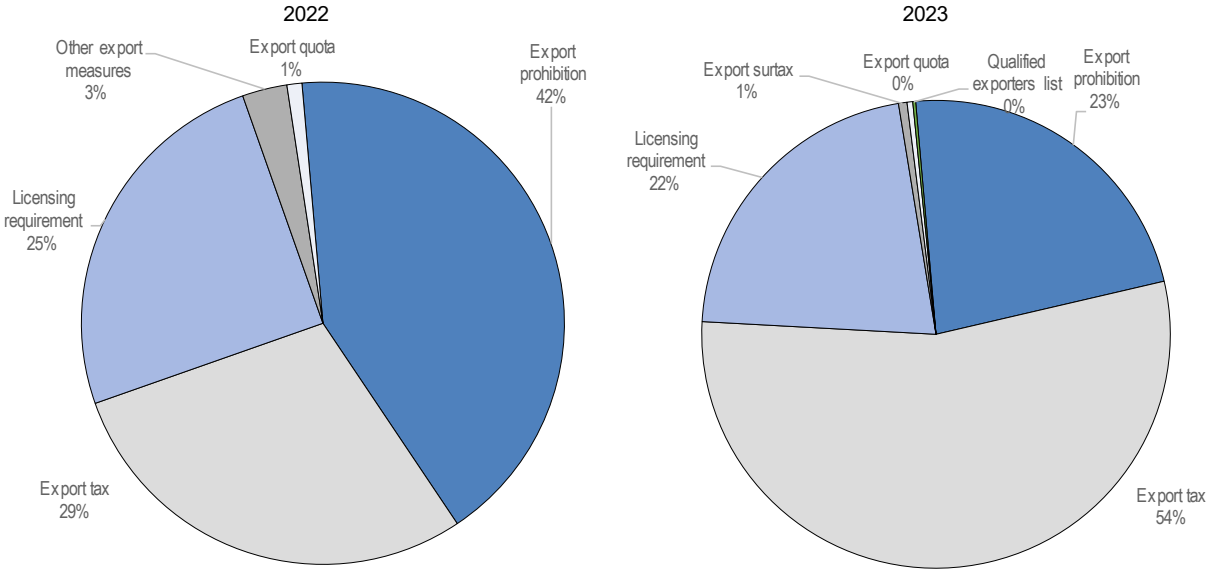
Number of countries applying at least one export restriction by type over time



Note: The export taxes category includes export taxes, export surtaxes, and fiscal taxes on exports.
Source: OECD Database on Export Restrictions on Industrial Raw Materials (OECD, 2025[2]).

Figure 2.11. Export prohibitions and exports taxes were the most commonly introduced measures in 2022-2023

Type of new measures introduced in 2022 and 2023

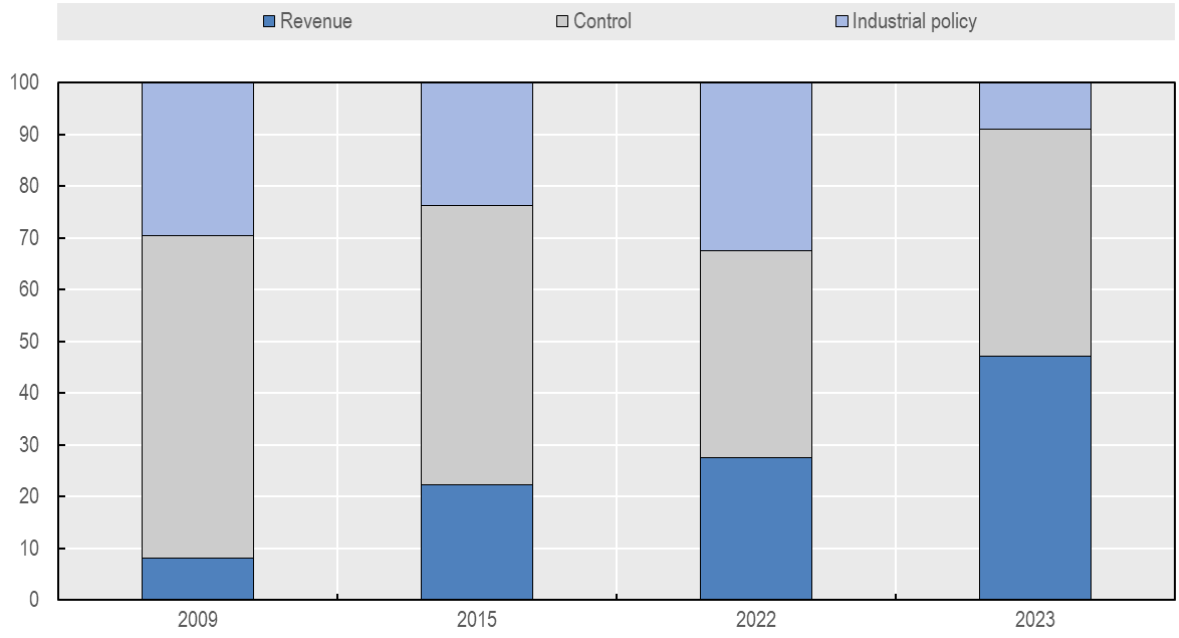


Note: The export taxes category includes export taxes, export surtaxes, and fiscal taxes on exports.
Source: OECD Database on Export Restrictions on Industrial Raw Materials (OECD, 2025[2]).

In 2023, in addition to revenue-related purposes, export restrictions were more frequently justified by goals related to monitoring and controlling export activity, including the conservation of natural resources (Figure 2.12).

Figure 2.12. Generating government revenue is the fastest growing officially stated purpose of export restrictions and the most stated purpose of restrictions introduced in 2023

Principal purpose of measures introduced (when the purpose is stated)



Note: Industrial policy covers the following sub-categories of stated purposes: “Safeguard domestic supply”, “Product is strategic for the economy”, “Promote further processing / value added”; “Protect local downstream industry”; Control covers the following sub-categories of stated purposes: “Monitoring / control of export activity” and “Conservation of natural resources”.
Source: OECD Database on Export Restrictions on Industrial Raw Materials (OECD, 2025[2]).

3 Implications

The OECD Inventory on Export Restrictions on Industrial Raw Materials reveals a concerning trend in which export restrictions are becoming at once increasingly prevalent and more prohibitive.

- *Sharp Increase in Export Restrictions (2009–2023):* Between 2009 and 2023, export restrictions on industrial raw materials grew more than fivefold, with the most significant rises occurring in the early 2010s.
- *Accelerated Growth in 2023:* The pace of growth in export restrictions accelerated in 2023, with 3.4% more exported raw material products subject to at least one export restriction compared to 2022. The growth rate in 2023 was more than double that of 2022 and nearly triple that of 2021.
- *Key Drivers:* The significant rise in export restrictions in 2023 coincided with a surge in raw material and energy prices following Russia's invasion of Ukraine in 2022, as well as growing geopolitical tensions.
- *Concentration of restrictions introduced in 2023:* Close to 94% of net additions to the global stock of export restrictions in 2023 were accounted for by just seven countries: China, Viet Nam, Burundi, Russia, the DRC, Zimbabwe, and Laos.
- *Shift toward export prohibitions*: Export taxes and licensing requirements were the most common and rapidly growing types of export restrictions between 2009 and 2023. However, quantitative restrictions like export prohibitions and quotas also increased, with export prohibitions becoming particularly common since 2019.
- *Raw materials most affected*: Waste and scrap products had the highest incidence of export restrictions, with ores and minerals—especially upstream materials in critical supply chains—seeing the most rapid increase.
- *Significant increase in restricted global trade*: Between 2021 and 2023, 14% of global trade in non-waste and scrap industrial raw materials faced export restrictions, with cobalt and rare earth elements seeing particularly high levels (67% and 46%, respectively).

Given the high interdependency in the global economy and many countries' reliance on international trade for critical raw materials, export restrictions risk negative spillover effects across global supply chains. This highlights the need for co-operative solutions to limit such measures.

Understanding the motivations behind export restrictions, as well as their impact on trading partners and global markets, is crucial. This knowledge will help identify less restrictive ways to meet both the security of supply needs of importing countries and the development goals of resource-rich nations.

Evidence on export restrictions is key to analysing their economic and non-economic impacts, and driving international co-operation. The OECD Inventory provides a unique, freely accessible source of data to support these efforts.

4 About the OECD Inventory on Export Restrictions on Industrial Raw Materials

Gathering evidence on the use of export restrictions is fundamental to analysing their economic and non-economic effects, and for motivating and informing international co-operation. The OECD Inventory of Export Restrictions on Industrial Raw Materials aims to improve transparency and to build a database of border and domestic measures that restrict the export of industrial raw materials. The Inventory is a rich source of qualitative and quantitative information on different types of export restrictions introduced (or withdrawn) by the main exporters of industrial raw materials. It is a public good that provides data for empirical analysis to advance understanding of the economic and non-economic effects of these export restrictions. The Inventory can be used to assess whether and how export restrictions may be contributing to shortages and high prices of raw materials, as well as how policy reforms may ease tensions and help ensure the secure and efficient supply of raw materials for all. [7]

Data sources collection process

Information on export restrictions is collected from official websites and documents issued by governments of the key producing countries. These include ministries in charge of the economy, trade, industry, mining, forestry, or foreign affairs, as well as customs agencies. Sources of information on policies that restrict exports include legal acts, rules, regulations, public notices, circulars, and notifications by ministries published on their websites. Secondary sources, such as news articles, are also used to identify export measures applied by a country or changes made to measures during the survey year. That said, only measures that can be substantiated from official sources are entered into the database.

Product coverage

The Inventory covers 65 industrial commodities, including 58 minerals and metals, six wood products, and all metallic waste and scrap from minerals and metals covered in the Inventory (Table 4.1). Export restrictions are recorded in the database for products classified in the Harmonised System 2007 nomenclature at the 6-digit level (HS6), which currently covers 489 products.

[7] See, for example, Kowalski and Legendre (2023[4]).

Table 4.1. Products covered in the Inventory

Minerals and metals

Aluminium	Antimony	Arsenic	Barytes	Bentonite
Beryllium	Bismuth	Borates	Cadmium	Chromium
Cobalt	Coke	Coking coal	Copper	Diamonds
Diatomite	Feldspar	Fluorspar	Gallium	Garnet
Germanium	Gold	Natural graphite	Gypsum	Indium
Iron and steel	Kaolin	Lead	Limestone	Lithium
Magnesite	Magnesium	Manganese	Mercury	Molybdenum
Nickel	Niobium	Perlite	Phosphates	Pig iron
Platinum group metals (PGMs)[1]	Potash	Rare earths (REE)	Rhenium	Selenium
Silica	Silicon	Silver	Strontium	Talc
Tantalum	Tellurium	Tin	Titanium	Tungsten
Vanadium	Zinc	Zirconium		

1. Platinum group metals (PGM) includes platinum, palladium, and all other PMG metals (rhodium, iridium, osmium and ruthenium).

Wood (6)

Industrial roundwood coniferous	Sawnwood coniferous
Industrial roundwood non-coniferous non-tropical	Sawnwood non-coniferous non-tropical
Industrial roundwood non-coniferous tropical	Sawnwood non-coniferous tropical

Other

Metal waste and scrap for all metals and minerals included in the Inventory

Country coverage

All countries accounting for at least 3% of global production of any of the covered materials or which were among the top five producers of any of products covered are included in the Inventory. Eighty-two countries producing industrial raw material commodities are currently surveyed. These countries accounted for 97% of the world production of minerals and metals, and 81% of world production of wood in 2022. This coverage essentially allows for the monitoring of export restrictions by all significant raw materials producers worldwide.

Table 4.2. Countries covered in the Inventory

Angola	Argentina	Australia	Austria (EU)
Belarus	Belgium (EU)	Bolivia	Botswana
Brazil	Bulgaria (EU)	Burundi	Canada
Chile	China (People's Republic of)	Colombia	Czechia (EU)
Democratic Republic of the Congo	Denmark (EU)	Egypt	Ethiopia
Finland (EU)	France (EU)	Gabon	Germany (EU)
Ghana	Greece (EU)	Guatemala	Guinea
Hungary (EU)	India	Indonesia	Ireland (EU)
Israel	Italy (EU)	Jamaica	Japan

Jordan	Kazakhstan	Kenya	Korea
Kyrgyzstan	Lao People's Democratic Republic	Madagascar	Malaysia
Mexico	Mongolia	Morocco	Mozambique
Myanmar	Namibia	Netherlands	New Caledonia (France)
Nigeria	Norway	Oman	Peru
Philippines	Poland (EU)	Portugal (EU)	Qatar
Romania (EU)	Russia	Rwanda	Saudi Arabia
Senegal	Sierra Leone	Slovakia (EU)	South Africa
Spain (EU)	Sweden (EU)	Tajikistan	Thailand
Tunisia	Türkiye	Ukraine	United Arab Emirates
United Kingdom	United States	Uzbekistan	Viet Nam
Zambia	Zimbabwe		

Types of measures covered

The Inventory records measures known or suspected to restrain export activity. These measures typically increase the relative price of exported products, decrease the quantity supplied, or change the terms of competition amongst suppliers. The list of surveyed measures includes export taxes, prohibitions, non-automatic licensing requirements, and any other export restricting measure (Table 4.3).

The Inventory excludes export controls that have been implemented to comply with international conventions and agreements that limit the trade of certain goods,[8] or measures implemented to control exports of dual-use items.[9] Only export restrictions that are applied to all trading partners are covered in the Inventory.[10]

Table 4.3. Measures restricting exports included in the Inventory

Export restriction	Definition
Export tax	A tax collected on goods or commodities at the time they leave a customs territory. This tax can be set either on a *per unit* basis or an *ad valorem* (percentage of value) basis. Other terms equivalent to export tax are also covered: *export tariff, export duty, export levy, export charge*.
Fiscal tax on exports	A tax not paid at the border, but which applies only to, or discriminates against, goods or commodities intended for export. An example is when the *sales tax* which a government charges is higher for goods or commodities intended for export than when these goods or commodities are offered for sale in the domestic market. Another term equivalent to fiscal tax on exports that is also covered: *export royalty*.
Export surtax	A tax collected on goods or commodities at the time they leave a customs territory, and which is applied in addition to the normal export tax rate. These can be part of a progressive tax system or can be adapted to price trends and can thus be of a temporary nature. Example: a USD 10 surcharge is applied on each ton of a commodity exported when the world price of this commodity exceeds USD 1 800 a tonne. Other terms equivalent to export surtax that are also covered: *export surcharge*.
Export quota	A prescribed maximum volume of permitted exports.
Export prohibition	No exports are permitted. Exceptions may be granted through export licences. Other terms equivalent to export prohibition that are also covered: *export ban, export embargo*.

[8] These include measure such as the Kimberley Process for conflict diamonds; the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES) for some wood products; the Rotterdam Convention with regard to some chemical products; and the Basel Convention regarding metallic waste and scrap.

[9] Dual-use items are goods, software and technology that can be used for both civilian and military applications.

[10] Export controls implemented on a bilateral basis (e.g. sanctions) are not included in the Inventory.

Export restriction	Definition
Licensing requirement (including non-automatic)	Exporters must obtain prior approval, in form of a license, to export a good or commodity. This practice requires submission of an application or other documentation as a condition for being authorised to export. Although export licensing regimes may vary in their impact on exports, even those regimes that have a relatively limited economic impact, nonetheless increase the amount of time needed to engage in trade. Licensing schemes can operate on the basis of product lists of various types, usually lists of restricted products that require licences be applied to restrict exports by destination (e.g., specific countries) or that have other conditions attached, such as a requirement that exportation may only be for a specified purpose. Other terms equivalent to non-automatic licensing that are also covered: *export permit*.
Minimum export price/reference price for exports	The minimum allowable price for a good being exported. This practice is often used in conjunction with export taxes in order to prevent under-invoicing and can be used as a base to calculate export taxes. In some cases, minimum export prices are not binding but are used as reference prices. Other terms equivalent to minimum export price that are also covered: *administered pricing*.
VAT tax rebate reduction / withdrawal	Most countries with a VAT system will rebate the VAT on exports. By denying VAT reimbursement in whole or part, it is relatively less advantageous to export a product than to sell it domestically. This measure is usually used to encourage downstream local production of products that use the raw material input. A variant that is also covered is the removal or reduction of rebate from *other sales taxes* on exports of a product.
Restriction on customs clearance point for exports	The government specifies the ports or customs offices through which the export of a good or commodity must be channelled.
Qualified exporters list	The right to export a certain commodity is granted to specific companies by the government through a process of application and registration.
Domestic market obligation	The requirement for producers to allocate a proportion of their annual production output for sale in the domestic market. Domestic market obligations are sometimes part of production-sharing contracts or contracts allowing extraction by foreign firms.
Captive mining	When a processing company is required to own the mine that produces its inputs or has been awarded sole mining rights with the intention that it will mine the commodity for use in its own domestic production processes and not trade it. Captive mining is a form of government support for firms with access to captive supplies, as well as a means to control the price and availability of a commodity in global markets. When captive mining concessions increase (as a share of production), exports of the relevant commodity are likely to fall.
Other export measures	Measures not elsewhere specified, but which influence *de jure* or *de facto* the level or direction of exports of industrial raw materials.

Source: OECD (2024[3]).

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OECD Inventory of Export Restrictions on Industrial Raw Materials 2025

Monitoring the Use of Export Restrictions Amid Growing Market and Policy Tensions

The *OECD Inventory on Export Restrictions on Industrial Raw Materials* has tracked export restrictions since 2009. It is updated annually and provides detailed data on the incidence, type, scope, and evolution of export restrictions across countries and products. The current edition reveals that export restrictions on industrial raw materials increased more than fivefold between 2009 and 2023, with a pronounced acceleration in 2023 which added over 500 new raw material products to the list of products with at least one export restriction. For some products, the global incidence of export restrictions increased by over 10%. In view of global interdependency, such restrictions risk disrupting supply chains and understanding their impact is crucial to identifying less restrictive alternatives that would balance security and development goals.

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