

and more announcements

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AIRBUS AIRBUS SE

Xetra
26.01.26 | 13:54

203.70
euros
-1.50% -3.10

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**Antimony shock: China halts exports -
who will supply the West now?**



(<https://www.finanznachrichten.de/nachrichten-2026-01/67472336-antimon-schock-china-stoppt-exporte-wer-liefert-jetzt-an-den-westen-631.htm>)

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PREDICTED SHARE PRICE GAIN This year is down in economic history as the year in which a largely unknown semi-metal brought global industry to a standstill.

Gold above \$5,000 fundamentally changes economics Antimony, long overshadowed by popular battery metals like lithium and cobalt, has suddenly become one of the planet's scarcest resources. Triggered by aggressive export restrictions from the People's Republic of China, which historically controlled over 80% of global processing capacity, supply security for the West has collapsed. What is shaking the "antimony shock" is no longer a theoretical threat, but a harsh economic reality:

According to industry analyses, market participants were already reporting significant supply shortages last year – in the one-figure tonnage range. We analyze the market and present a potential beneficiary.



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market dries up.

More The exact extent of the supply deficit remains disputed due to a lack of transparency in antimony statistics, but the structural undersupply is real. In this geopolitical vacuum, where physical availability is more important than price, the explorer Antimony Resources is emerging as a key strategic player for Western supply security, while industrial giants tremble for their supply chains. Market data paints a bleak picture for consumers. As the investment magazine Mugglehead reports in a recent summary, antimony is the "invisible element" without which large parts of modern life would grind to a halt. It is essential for fire protection in plastics, textiles, and electronics, and indispensable for the defense industry. But China is ruthlessly exploiting its near-monopoly: Officially justified by national security, export restrictions have effectively brought the global supply of the metal to a standstill.

The result is panic on the spot markets. A growing number of observers are analyzing the situation as not a cyclical fluctuation, but a structural disruption. With Russia largely unavailable as an alternative supplier to many Western buyers due to sanctions, and projects in Central Asia often under Chinese influence, the West is facing empty warehouses. Voices from industry are growing louder and more alarming: the question is no longer how much the material costs, but whether it can be delivered at all. In a world where fire safety regulations are non-negotiable, no antimony simply means no production.

BASF and Airbus: Giants in search of safety

The magnitude of this crisis becomes clear when looking at the largest industrial consumers. For corporations like Airbus and BASF, antimony is not an optional additive, but a critical component. Airbus, which according to AirInsight is already struggling with supply chain issues, requires antimony-containing flame retardants for the interior lining and wiring of its aircraft to meet the stringent FAA and EASA safety standards. Without these certifications, no aircraft can take off. The situation is similarly dire for the chemical giant BASF, which processes antimony as a catalyst and additive in complex value chains. Both companies exemplify the vulnerability of Western industry: They are technological leaders, but at the beginning of their supply chain, they are entirely dependent on a power that uses raw materials as a geopolitical weapon.

Antimony Resources as a response to the "friend-shoring doctrine"

Antimony Resources is stepping into precisely this supply vacuum. The Canadian company is profiting like few others from the restructuring of US supply chain policy. The government in Washington and the Pentagon have recognized that dependence on China for a material essential for ammunition and night-vision devices poses an unacceptable security risk. Antimony Resources is positioning itself as the solution to the "friend-shoring" strategy, developing deposits in secure, Western jurisdictions – Antimony's Bald Hill project in New Brunswick, Canada, is considered promising and boasts high grades in its early stages.

Investors are increasingly recognizing the value of this potential and the strategic independence that Antimony Resources represents. With Bald Hill, Antimony Resources possesses an asset that could fill precisely the gap left by China. Investors are increasingly beginning to price in a safety premium for North American antimony exploration projects. An ounce of antimony from secure, Western production could justify several times the Shanghai spot price for strategic buyers such as the US Department of Defense or industrial conglomerates – a scenario that market analysts are discussing.

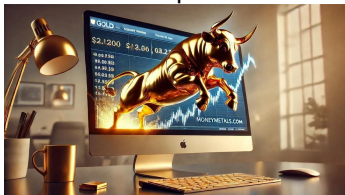
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Antimony stock is in tune with the times.

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The company is thus transforming itself from a pure resource explorer into a geopolitical asset. In an environment where analysts are predicting persistently high deficits, Antimony Resources offers a rare opportunity to profit directly from this unique market situation. While the industry is desperately searching for materials, Antimony Resources is on. The stock is therefore perfectly in tune with the current climate and has already gained significant value. Given its mid-double-digit market capitalization, further upside potential is likely if



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Dynamic movement - how much upside potential is there for the stock?

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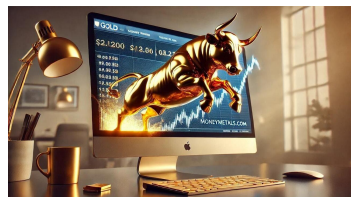
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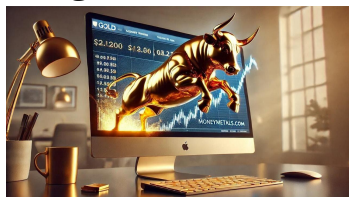
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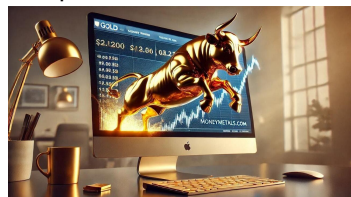
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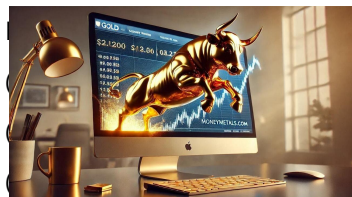
- 13:58 Strategische Flottenmodernisierung am Nil: Erstflug des ersten Airbus A350-900 für Egyptair erfolgreich absolv...
- 13:51 Air Asia verhandelt über Kauf von rund 100 Airbus A220
- 11:50 **Airbus: Darum fällt die Aktie** (<https://www.finanznachrichten.de/nachrichten-2026-01/67523078-airbus...>)

Zeit Aktuelle Nachrichten

10:30 Morgen-Update: Breaking: Airbus kippt - was jetzt wirklich wichtig wird

10:27 **Airbus unter Druck: Trumps Handelskrieg trifft Europas Luftfahrt** (<https://www.finanznachrichten.de/...>)**NACHRICHTEN ZU ANTIMONY RESOURCES CORP****([HTTPS://WWW.FINANZNACHRICHTEN.DE/NACHRICHTEN-AKTIEN/ANTIMONY-RESOURCES-CORP.HTM](https://www.finanznachrichten.de/nachrichten-aktien/antimony-resources-corp.htm))****Zeit Aktuelle Nachrichten**06:10 **Das kritische Metall: Warum Antimony Resources zum geopolitischen Player aufsteigen könnte** (<https://www.finanznachrichten.de/nachrichten-aktien/antimony-resources-corp.htm>)05:30 **China hält den Hebel: Wird Antimon zur nächsten Rohstoff-Bombe für Anleger?** (<https://www.finanznachrichten.de/nachrichten-aktien/antimony-resources-corp.htm>)Fr **Grönlandkrise abgewendet! Boom bei Gold, Silber und kritischen Metallen beflügelt Antimony Resourc...**Fr **Grönland-Krise entschärft - aber der Rohstoff-Krieg läuft weiter: Diese Antimon-Aktie könnte profitiere...**Do **Ist das DIE Rohstoff-Story des Jahres?** (<https://www.finanznachrichten.de/nachrichten-2026-01/6749601...>)**NACHRICHTEN ZU BASF SE ([HTTPS://WWW.FINANZNACHRICHTEN.DE/NACHRICHTEN-AKTIEN/BASF-SE.HTM](https://www.finanznachrichten.de/nachrichten-aktien/basf-se.htm))****Zeit Aktuelle Nachrichten**14:03 **EQS-CMS: BASF SE veröffentlicht eine Kapitalmarktinformation** (<https://www.finanznachrichten.de/nachrichten-aktien/basf-se.htm>)13:36 **BASF SE: Stabilität als strategischer Werkstein**11:09 **BASF SE: Q4-Vorläufige Zahlen: Druck im upstream-Segment dürfte 2026 anhalten - KAUFEN.** (<https://www.finanznachrichten.de/nachrichten-aktien/basf-se.htm>)

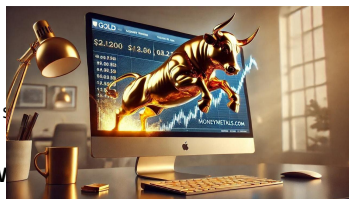
10:30 Morgen-Update: Morgen-Update: BASF mit Rückenwind - diese Phase ist oft entscheidend - jetzt lesen!

Gold above \$5,00010:18 **DEUTSCHE BANK RESEARCH stuft BASF SE auf 'Hold'** (<https://www.finanznachrichten.de/nachrichten-2026-01/6749601...>)**changes economics!**Weitere Informationen zu Personen wie Mario hose ellernstr (<https://www.finanznachrichten.de/dossier/807976-mario-hose-ellernstr.htm>)Fabian Lorenz (<https://www.finanznachrichten.de/dossier/321722-fabian-lorenz.htm>) Nico poppNico popp (<https://www.finanznachrichten.de/dossier/484122-nico-popp.htm>) Carsten MainitzCarsten Mainitz (<https://www.finanznachrichten.de/dossier/438001-carsten-mainitz.htm>) Stefan FeulnerStefan Feulner (<https://www.finanznachrichten.de/dossier/477596-stefan-feulner.htm>) André Will-LaudienAndré Will-Laudien (<https://www.finanznachrichten.de/dossier/557752-andre-will-laudien.htm>) Armin SchulzArmin Schulz (<https://www.finanznachrichten.de/dossier/1176317-armin-schulz.htm>) Hugh RogerHugh Roger (<https://www.finanznachrichten.de/dossier/301529-hugh-roger.htm>) Lewis BlackLewis Black (<https://www.finanznachrichten.de/dossier/454516-lewis-black.htm>) Lyndsay MalchukLyndsay Malchuk (<https://www.finanznachrichten.de/dossier/1613050-lyndsay-malchuk.htm>) und Organisationen wie Apaton Finance GmbHApaton Finance GmbH (<https://www.finanznachrichten.de/dossier/331642-apaton-finance-gmbh.htm>) Apaton-financeApaton-finance (<https://www.finanznachrichten.de/dossier/1655591-apaton-finance.htm>) BionxtBionxt (<https://www.finanznachrichten.de/nachrichten-aktien/bionxt-solutions-inc.htm>) Almonty Industries**PREDICTED
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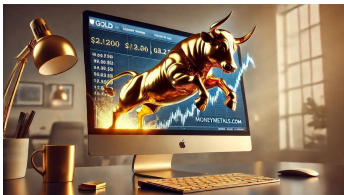
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