

For a decade we have been living through a period of great turbulence in the commodity markets. Rising and sometimes highly volatile prices, strong geological and market concentration, and state intervention in the commodity markets all stoke fears of future supply bottlenecks and an expectation of ensuing international tension and violent confrontation. The list of recent incidents is long: the gas dispute between Russia, Ukraine and the EU; food revolts in Haiti, Tunisia and Algeria; China's trade conflict with the United States and the EU over export restrictions imposed on many metals; and the confrontation between China and Japan over China's export ban on rare earths to name just a few. (...)

The abstract:

http://www.swp-berlin.org/en/products/swp-research-papers/swp-research-paper-detail/article/nappe_ressourcen_konfliktrisiko_rohstoffe.html

The research paper:

http://www.swp-berlin.org/fileadmin/contents/products/research_papers/2011_RP02_lag_mdn_rsv_ks.pdf