The impact of US export controls on firms' export behavior in a third country: Evidence from Japanese customs data*

Naoto Jinji (Kyoto University, PRI)
Keiko Ito (Chiba University, PRI)
Toshiyuki Matsuura (Keio University, PRI)

Abstract

This study examines how US export controls targeting Chinese firms affect the export behavior of Japanese firms using Japan Customs data. Focusing on the impact of the US Bureau of Industry and Security's Entity List (EL), we identify exports from Japanese firms to Chinese firm added to the EL by the end of 2022. We find that inclusion of Chinese firms in the EL led to a significant reduction in Japanese firms' exports to those firms. In response, the affected Japanese firms increased their exports to non-targeted Chinese firms and firms in countries aligned with the United States.

Keywords: export controls; Entity List; Japan Customs data
JEL Classification: F13; F14; F51

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