

The world's 4th largest chip maker is banned in China, the global technology supply chain is in danger of major disturbance

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However, observers said the move was seen as retaliation for the semiconductor export restriction that Washington imposed on Beijing recently. The ban, effective immediately, directly affects Micron's sales to China's key information infrastructure operators, covering a range of key sectors, from telecommunications to telecommunications, communication, energy, transportation, banking and even water supply and drainage.

Following the ban, the sale of Micron products including DRAM, NAND flash memory, and solid-state drives (SSDs) to entities in these areas is strictly prohibited. Micron's major China customers, including Lenovo, Xiaomi, Inspur Electronics Information, ZTE, Coolpad, China Electronics Corp and Oppo, will be directly affected by the decision. Basically, the market that accounts for about 11% of Micron's total revenue in 2022, or \$ 30.8 billion, will be officially cut off after the decision of the Chinese authorities.



The Cybersecurity Assessment Office, a division of the Cyberspace Administration of China (CAC), recently released a statement saying that Micron had failed to pass the standard cybersecurity assessment process set by the agency. This posed, leading to the ban mentioned above. However, the specifics of the review process, the products involved, and the potential security risks were not disclosed. Notably, this decision was made 50 days after the CAC began investigating Micron products for national security reasons.

The US Commerce Department immediately criticized the decision of the Chinese side, asserting that it "resolutely opposes restrictions that have no basis in fact". It also said that the move to ban Micron is inconsistent with Beijing's stated commitments to an open market and transparent regulatory framework.

Meanwhile, Micron's side said it is currently evaluating next steps, and hopes to have a frank discussion with the Chinese authorities on the matter. Betty Wu Mingxia, the new general manager of Micron China, affirmed the company's commitment to the technology ecosystem in China, highlighting the important role it plays in Micron's global chain of operations.

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