FCC exempts Netgear from ban on foreign routers, doesn’t explain why

Chinese drone companies DJI, the market share leader, and its smaller rival Autel have yet to receive exemptions. “If the router Conditional Approval process follows a similar pattern, Chinese-origin manufacturers like TP-Link may face a presumptive denial, while companies with manufacturing in allied nations like Taiwan, Vietnam, or South Korea could find an easier path,” the Global Electronics Association report said. This easier path for non-Chinese companies is “by no means guaranteed,” the report said.

TP-Link was founded in China but relocated to the US in 2024. It was already facing the possibility of a US ban over a year before the FCC’s industry-wide router action, but the Trump administration never formalized a TP-Link ban. TP-Link may hope its relocation to the US will help it win an exemption, but the Global Electronics Association report said the drone process suggests that “Chinese-origin manufacturers may face a presumptive denial regardless of corporate restructuring.”

Fast approvals key for router supply, group says

Even if the Trump administration is inclined to approve most exemption requests, the industry trade group’s report said there are doubts about how fast the administration can process applications for the dozens of new models introduced annually.

“Existing channel stock of previously authorized models may

last three to six months, creating a window during which the market can absorb the disruption, but that window closes if the approval process proves as restrictive or slow as the drone precedent suggests," the report said. The system "introduces a structural advantage for the largest firms" because "documentation and onshoring obligations are extensive and smaller manufacturers and startups may lack the resources to navigate the process," it said.

The industry already "reduc[ed] Chinese-origin imports from 24 percent of units in 2019 to 4 percent in 2025" in a shift that cost billions and required "full cooperation of contract manufacturing ecosystems across Southeast Asia," the report said. "The Conditional Approval framework now asks the industry to execute a second migration of comparable magnitude, this time to domestic soil, on a timeline measured in quarters rather than years, and without the established manufacturing ecosystems, workforce pipelines, or supplier networks that made the first migration possible."

The report warned that if the approval process isn't quick, residential consumers and home Internet service providers "will face constrained selection and delayed access to next-generation products at precisely the moment Wi-Fi 7 adoption should be accelerating."

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