



## November 2001: brief Kondratieff Wave update, commodities and war

It occurred to me just now, there is an interesting Kondratieff wave aspect to current events. The K wave is a price wave. Each up move in commodity prices in the past, on each up side of the wave, was fed by two ideologies squaring off against one another. Kondratieff himself called them 'wars of expansion'. The waring lasted years, and eventually pushed commodity prices to a peak, which was the peak of the Kwave;

1800 - 1812 Napoleon  
1860's US civil war  
1911 - 1919 WW I  
1960's Vietnam

As you know in the cycles classes, I talked about how the same would repeat, but was guessing that the ideologies might be US v China and the various Taiwan disputes. But the current stuff (West versus Islam) is looking decidedly repetative; and quite possible to last years, easily 15 years. The military spending is enormous already (chemical, biological and armaments). Things could easily escalate into sustained military spending here.

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