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EU-China Summit 2025:
Strategic Shifts
&
the End of Engagement

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EU-China Summit 2025: Strategic Shifts and the End of Engagement

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Abstract

The 24 July 2025 EU-China Summit marked a watershed moment in bilateral relations, revealing unprecedented strain as the two sides commemorated 50 years of diplomatic ties. Moving beyond routine trade disputes, the summit highlighted profound divergences over economic security, geopolitical alignment, and models of global governance. Key issues included: the EU's record trade deficit with China and mounting concerns over Chinese industrial overcapacity; escalating economic statecraft exemplified by Chinese rare earth export controls targeting European supply chain vulnerabilities; and deep strategic divides over Russia's war in Ukraine. While both sides found common ground on climate cooperation, progress was largely tactical and insufficient to offset broader tensions. The summit underscored the evolution of the EU's approach—viewing China more as a systemic rival and economic competitor than as a cooperative partner—and reinforced Europe's commitment to "de-risking" through diversification and strategic autonomy. Ultimately, the summit illuminated a new equilibrium of managed strategic competition, with selective cooperation overshadowed by contestation in critical sectors and global governance. These dynamics suggest that future EU-China summits will serve less as vehicles for genuine problem-solving and more as platforms for negotiating an uneasy coexistence in an increasingly multipolar world.

Introduction

The 24 July 2025 EU-China Summit reveals a relationship that is under unprecedented strain, marking what European Commission President Ursula von der Leyen termed as a "clear inflection point" (Chen, 2025) in one of the world's most consequential bilateral relationships. The summit, commemorating 50 years of diplomatic ties, exposed fundamental divergences that transcend routine trade disputes to encompass existential questions about economic security, geopolitical alignment, and the future of global governance.

Held amidst a backdrop of mounting tensions and shifting global alliances, the summit highlighted the rapid deterioration of what was once hailed as a mutually beneficial partnership. Over the decades, the EU and China have evolved from economic collaborators to partners navigating a complex relationship defined by simultaneous cooperation, competition, and systemic rivalry. The collapse of earlier optimism was starkly evident, not only in the summit's condensed format but also in the symbolism of protocol breaches, such as President Xi Jinping's conspicuous absence from Brussels and China's preference for bilateral over multilateral engagement with Europe.

The summit took place in the shadow of transformative global developments, notably the ongoing US-China trade negotiations, forming a strategic triangulation that further complicated Brussels' calculations. Against this shifting international landscape, the EU's unprecedented trade deficit with China, persistent concerns over subsidies and industrial overcapacity, and Beijing's imposition of rare earth export controls have emerged as acute sources of friction. These economic disputes reflect deeper issues over market access, technological leadership, and the integrity of critical supply chains—concerns that now sit at the very heart of European economic and security strategy.

Beyond economics, the summit laid bare strategic fault lines on core geopolitical concerns such as the war in Ukraine. The EU's insistence on an active Chinese role in seeking peace clashed with Beijing's strategic calculations, evidence of diverging visions for the international system and the limits of diplomatic engagement. While there was some progress in joint climate action, the narrowness and caution of these agreements underscored the diminishing scope for genuine cooperative ventures.

In light of these shifts, the 2025 EU-China Summit stands as a watershed moment—it signals not just a temporary crisis, but a decisive transition towards managed strategic competition, where selective cooperation endures only where interests align, and rivalry has become the dominant mode. This introduction sets the stage for a deeper examination of the summit's context, the specific points of contention, and the evolving nature of one of the world's central relationships in the era of global multipolarity.

The Strategic Context: Competing Gravitational Forces

The Deteriorating Foundation

The 25th EU-China Summit occurred against a backdrop of systematically deteriorating relations that have moved far beyond the optimistic partnership framework established in

earlier decades (Ewe, 2025). What began as economic complementarity has evolved into what European officials now characterise as a three-dimensional relationship: China simultaneously functions as a cooperation partner, economic competitor, and systemic rival (European Commission, 2025). This tripartite categorisation, criticised by Wang Yi, State Councillor and Minister of Foreign Affairs as contradictory and reflective of "cognitive dissonance", (Polit, 2023) has become the operational framework through which Brussels approaches Beijing.

The summit's condensation from two days to one, at Beijing's request, symbolised the relationship's diminished ambitions (Ewe, 2025). Xi Jinping's refusal to travel to Brussels in March 2025 to mark the 50th anniversary of ties (Bounds, 2025), breaking protocol that would have dictated European hosting after the previous Beijing summit, reflected China's hardening stance toward EU institutions. This diplomatic slight was not merely procedural but represented Beijing's strategic assessment that engagement with individual member states yields superior results to multilateral EU dialogue.

Geopolitical Triangulation: The Trump Variable

The summit's timing coincided with significant recalibrations in global trade relationships. President Trump's conclusion of a comprehensive trade agreement with the EU on 28 July 2025 (immediately after the EU-China Summit), imposing a 15% tariff on most European goods while securing \$750 billion in energy purchases and \$600 billion in American investments has fundamentally altered the strategic calculus (The White House, 2025). This US-EU accord demonstrated that Brussels had secured unfavourable economic arrangements with Washington while maintaining adversarial tensions with Beijing.

Simultaneously, ongoing US-China trade negotiations in Stockholm suggest potential stabilisation in Sino-American economic relations (Chia, 2025). The prospect of extended trade truces between Washington and Beijing, combined with the EU's accommodation to American tariff demands has created a complex triangular dynamic wherein China could no longer rely on US-EU tensions to drive European rapprochement with Beijing.

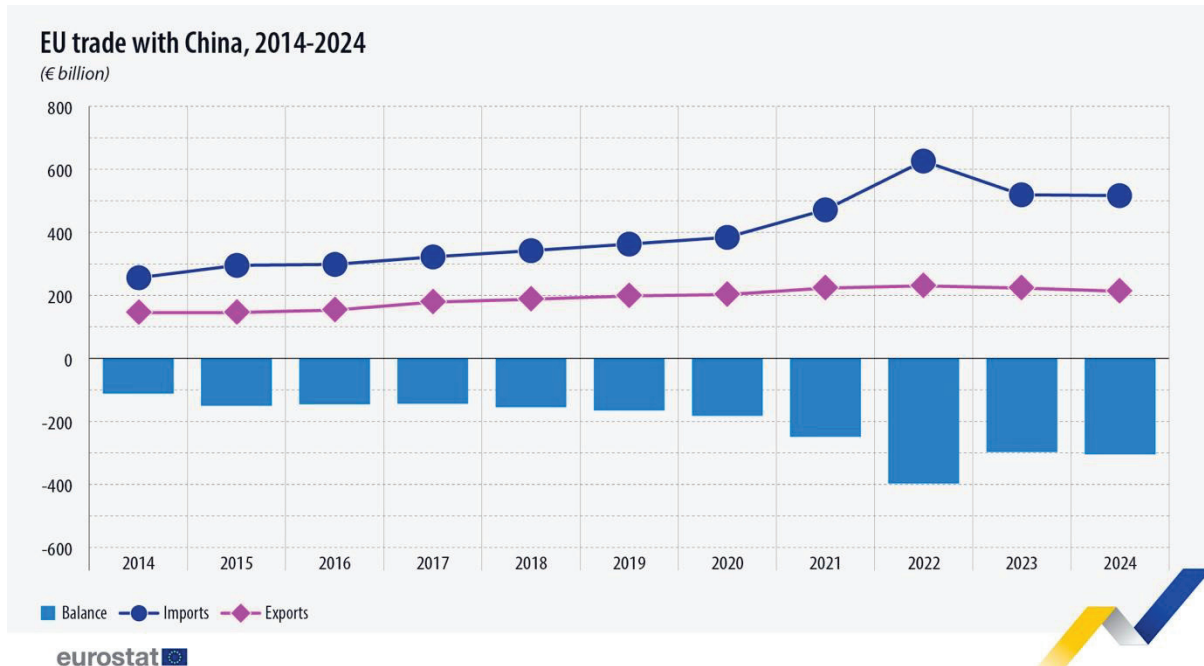
The Economic Dimension: Structural Imbalances and Industrial Competition

The Trade Deficit Crisis

Von der Leyen's characterisation of EU-China relations reaching an "inflection point" was anchored in stark economic realities. The EU's trade deficit with China has doubled over the past decade, reaching €300 billion (\$350 billion) in 2024 (European Union, 2025). This imbalance reflects fundamental asymmetries— the EU accounts for 14.5% of China's total

exports, while China represents only 8% of European exports. Such disparities signal not merely cyclical trade fluctuations but structural divergences in market access and competitive positioning.

Figure 1: EU Trade with China



Source: https://ec.europa.eu/eurostat/statistics-explained/index.php?title=China-EU_-_international_trade_in_goods_statistics

European officials attributed this imbalance to "an increasing number of trade distortions and market access barriers" (European Union, 2025). Unlike other major markets that have imposed reciprocal restrictions, Europe has maintained relatively open access to Chinese goods while facing significant barriers to European market penetration in China. This asymmetric openness has become politically unsustainable, particularly as European industries face intensifying competition from subsidised Chinese manufacturers.

Industrial Overcapacity and the "Made in China 2025" Challenge

The summit occurred amid growing European concerns about Chinese industrial overcapacity, particularly in sectors prioritised under Beijing's "Made in China 2025" initiative (Wuttke, 2017). European officials highlighted overcapacity in steel, solar panels, electric vehicles and batteries as creating unfair competitive pressures through subsidised production

that exceeds domestic Chinese demand (Liboreiro, 2025). This surplus capacity, redirected to global markets at artificially low prices, undermines European industrial competitiveness in critical future-oriented sectors.

Chinese industrial subsidies, estimated at approximately 1.7% of GDP, substantially exceed comparable support in other major economies (Branstetter, 2023). These subsidies, combined with preferential tax treatment and below-market credit from state-controlled banks, create market distortions that extend beyond traditional protectionist measures to encompass systematic industrial policy coordination. The cumulative effect has been Chinese dominance in strategic sectors— over 75% of global lithium-ion battery manufacturing, nearly 80% of solar module production, and the majority of electric vehicle output (Kuo, 2025).

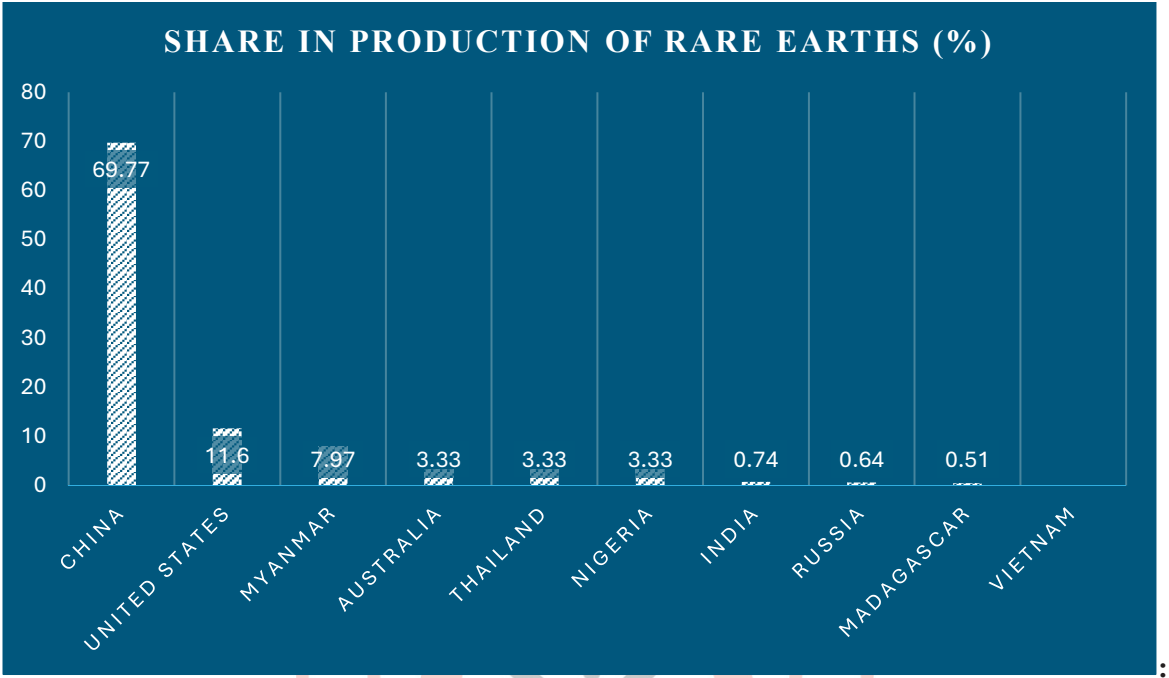
European leaders emphasised that addressing this overcapacity was "both possible and needed" for sustainable bilateral relations (Liboreiro, 2025). However, Chinese officials defended their industrial policies as compliant with WTO rules and argued that global demand projections, particularly in clean energy sectors, justify current production levels (Ministry of Foreign Affairs, People's Republic of China, 2025). The International Energy Agency's estimate of a 27 million electric vehicle shortage by 2030 was cited as evidence that Chinese capacity represents solutions to global supply gaps rather than problematic excess (Ministry of Foreign Affairs, People's Republic of China, 2025).

The Rare Earth Leverage: Economic Statecraft and Supply Chain Vulnerability

Beijing's Strategic Response

China's imposition of export controls on seven rare earth elements in April 2025 viz. samarium, gadolinium, terbium, dysprosium, lutetium, scandium, and yttrium, represented a significant escalation in economic statecraft (Ghassabeh, 2025). These controls, affecting materials critical for defence, automotive, and clean energy sectors, directly targeted European industrial vulnerabilities. With China produces 69.77% of global rare earths, these restrictions threatened to paralyse European manufacturing in advanced technology sectors (Statista, 2025).

Table 1: Top Ten Producers of Rare Earths by Country.



Source: Chart made by author using data from Statista

The timing of these controls, coinciding with US tariff increases on Chinese products, demonstrated Beijing's willingness to weaponise supply chain dependencies for geopolitical leverage (Ghassabeh, 2025). The European officials characterised these measures as "unjustified" and "coercive", highlighting the strategic risks of concentrated supply chains (European Parliament, 2025). The European Parliament's resolution demanded acceleration of the Critical Raw Materials Act implementation and diversification of supply sources to reduce Chinese dependency (European Parliament, 2025).

The Summit Breakthrough: Tactical Concessions

One of the summit's few concrete achievements was China's agreement to establish an "upgraded export supply mechanism" for rare earth elements (Liboreiro, 2025). This system, designed to address bottlenecks and delays in supply chains, represented a tactical Chinese

concession to European pressure. Von der Leyen characterised this agreement as enabling immediate problem-solving when supply disruptions occur (Liboreiro, 2025).

However, this arrangement fell short of European demands for complete removal of export controls. Chinese officials maintained that rare earth restrictions served legitimate national security and non-proliferation objectives (Amazing Magnets, 2025). The provisional nature of these accommodations, subject to Chinese regulatory discretion, underscores European vulnerability in critical supply chains and the necessity for long-term diversification strategies.

The Geopolitical Divide: Ukraine, Russia, and Systemic Rivalry

The Ukraine Factor: Irreconcilable Positions

The war in Ukraine emerged as one of summit's most intractable issue, revealing fundamental disagreements about international order and strategic priorities. European leaders pressed Chinese counterparts to leverage Beijing's influence with Moscow to facilitate ceasefire negotiations and Ukrainian peace (Zadorozhnyy, 2025). Von der Leyen emphasised that "how China continues to interact with Putin's war will be a determining factor for our relations going forward" (Thibault, 2025).

Chinese positions on Ukraine reflected complex strategic calculations that extends beyond humanitarian concerns to fundamental geopolitical architecture. Reports of Chinese Foreign Minister Wang Yi's private acknowledgment to EU officials that Beijing "does not want to see Russia lose the war" revealed the strategic logic underlying China's public neutrality (Bermingham, 2025). Wang's concern that Russian defeat would enable full American strategic focus on China exposed the zero-sum thinking that increasingly characterises Chinese geopolitical analysis.

The "No Limits" Partnership: Strategic Implications

Xi Jinping's reaffirmation of the "no limits" partnership with Putin, particularly his February 2025 phone call on the third anniversary of Russia's invasion, demonstrates the durability of Sino-Russian alignment despite Western pressure (Reuters, 2025). This partnership, declared just days before the February 2022 invasion, has evolved into comprehensive economic and technological cooperation that directly contradicts European security interests. The EU's sanctioning of two Chinese banks for allegedly supporting Russia's

defence industrial base represented unprecedented European willingness to impose economic costs on Chinese entities (Shankar, 2025).

Strategic Autonomy Versus Alliance Solidarity

The summit highlighted tensions within European strategic thinking between desires for autonomous China policy and solidarity with transatlantic alliance commitments. While European leaders sought balanced engagement with Beijing, the imperative of Ukrainian support and American partnership limited their flexibility. This constraint was particularly evident in von der Leyen's alignment with Trump administration's position at the G7 summit, wherein she accused China of weaponising rare earth dependencies and providing mass subsidies to dominate global supply chains (Esteban, 2025).

The European approach reflects growing recognition that Chinese and European concepts of international order are fundamentally incompatible. Beijing's vision of "equal and orderly multipolarization" challenges the liberal institutional framework that has underpinned European integration and prosperity (AFP, 2025). European officials increasingly view Chinese behaviour as systematically undermining rules-based international governance rather than representing alternative approaches within existing frameworks.

Climate Cooperation: The Remaining Common Ground

The Joint Statement Achievement

Despite broader tensions, the two sides agreed on a Joint Press Statement on Climate Change and Environmental Cooperation, representing one area where shared interests enable continued collaboration (Council of the European Council, 2025). Both parties reaffirmed commitments to emission reductions, increased climate finance, and biodiversity protection. This cooperation reflects mutual recognition that climate challenges require sustained collaboration regardless of broader geopolitical tensions.

The climate statement emphasised acceleration of renewable energy deployment and collaboration on emission trading systems, including China's newly introduced carbon market. European officials highlighted potential cooperation in carbon capture and storage technologies, representing areas where Chinese and European capabilities complement rather than compete with each other.

Limitations of Climate Diplomacy

However, climate cooperation's scope remains constrained by broader relationship dynamics. European officials made clear that climate collaboration cannot occur "at any price" and must be consistent with European values and security interests. The instrumentalisation of climate cooperation for broader geopolitical purposes limits its potential to serve as a relationship stabiliser during periods of heightened tension.

Furthermore, climate cooperation increasingly intersects with trade disputes, particularly regarding clean energy technologies where Chinese overcapacity threatens European industrial competitiveness. The tension between welcoming Chinese climate contributions and protecting European green energy sectors illustrates the difficulty of compartmentalising cooperation amid broader rivalry.

Strategic Implications: Towards Managed Competition

The De-risking Imperative

The summit's outcomes reinforced European commitment to "de-risking" strategies that reduce critical dependencies on China while maintaining economically beneficial engagement. This approach, articulated by von der Leyen in March 2023, seeks to preserve commercial relationships while mitigating strategic vulnerabilities. The rare earth supply disruptions and Chinese support for Russia's war efforts have validated European concerns about excessive dependency on Chinese supply chains.

De-risking encompasses multiple dimensions—diversification of critical supply chains, enhancement of European industrial capabilities in strategic sectors, and development of alternative partnerships with democratic allies. The European Commission's focus on the Critical Raw Materials Act and strategic partnerships with countries meeting "high sustainability and human rights standards" reflects this comprehensive approach (European Parliament, 2025).

The Partner-Competitor-Rival Framework Evolution

The summit demonstrated that the EU's tripartite characterisation of China as partner, competitor, and systemic rival has evolved towards emphasis on competitive and rival dimensions at the expense of partnership elements. While cooperation continues in specific areas like climate change, the overall relationship trajectory suggests systematic competition rather than selective collaboration.

European officials' growing comfort with explicitly confronting Chinese practices—from industrial subsidies to geopolitical alignments—indicates reduced concern about Chinese economic retaliation. The EU's willingness to impose sanctions on Chinese banks and restrict Chinese access to European medical device procurement demonstrates confidence in European leverage despite trade deficit concerns.

Chinese Strategic Adaptation

Chinese responses to European pressure reveals sophisticated understanding of European political dynamics and strategic vulnerabilities. Beijing's differentiated approach, maintaining harsh rhetoric towards EU institutions while cultivating relationships with individual member states, reflects assessment that European unity remains fragile (Jie, 2025). Hungary's Viktor Orban and other European leaders' continued engagement with Beijing despite official EU positions illustrate persistent divisions within European China policy.

Future Trajectory: Institutional Adaptation and Strategic Competition

The Limits of Summit Diplomacy

The 2025 summit's limited concrete achievements underscore the declining utility of traditional diplomatic engagement for addressing fundamental strategic divergences. While maintaining dialogue, channels serves important signaling and crisis management functions; the expectation that periodic meetings can bridge structural differences appears increasingly unrealistic. Future EU-China summits are likely to function more as competitive positioning exercises rather than genuine problem-solving forums.

The summit's compression to a single day and focus on managing rather than resolving disputes suggests institutional adaptation to relationship realities. Rather than seeking comprehensive agreements, both sides appear to be establishing frameworks for sustained competition while preventing escalation to outright confrontation.

Sectoral Approaches and Strategic Patience

Future EU-China relations will likely be characterised by sector-specific strategies rather than comprehensive frameworks. Areas like climate cooperation may maintain collaborative elements while trade, technology, and security issues become increasingly competitive. This differentiated approach requires sophisticated policy coordination within European institutions and among member states.

The EU's experience with Chinese rare earth restrictions and responses to European policy initiatives will inform development of more resilient strategies for managing Chinese leverages. Investment in alternative supply chains, strategic stockpiling, and technological innovation will reduce European vulnerabilities while maintaining mutually beneficial engagements.

Conclusion

The July 2025 EU-China Summit marked a decisive transition from an 'era of engagement and integration' to one of 'strategic competition and managed rivalry'. Von der Leyen's characterisation of the relationship reaching a "clear inflection point" accurately captured the fundamental recalibration underway in one of the world's most important bilateral relationships.

The summit's outcomes, limited progress on rare earth supply mechanisms and climate cooperation alongside fundamental disagreements on trade, Ukraine, and global governance—reflects a new equilibrium in EU-China relations. This equilibrium is characterised by selective cooperation in areas of mutual interest, intensive competition in strategic sectors, and fundamental disagreement about international order.

For European policymakers, the summit's lessons are clear—China's emergence as a systematic rival requires comprehensive strategy adaptation that moves beyond traditional diplomatic engagement towards strategic competition across multiple domains. The success of this adaptation will determine whether Europe can maintain its prosperity and security while managing the rise of an increasingly assertive China.

The relationship's future trajectory will be shaped not by summit diplomacy but by the relative success of competing development models, the effectiveness of alliance strategies, and the ability of each side to adapt to changing global circumstances. In this context, the 2025 summit will be remembered not for its achievements but for its clarity in defining the parameters of competition that will characterise EU-China relations for the remainder of the decade.

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