Issue Brief

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Crossroads after the 2025 EU-China Summit

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Despite an initial rethaw of official ties earlier in the year, the 2025 EU-China Summit was marked by diplomatic frictions, cancellations, and last-minute adjustments. The meeting produced modest outcomes on export controls, climate targets, and regulatory cooperation—incremental steps with uncertain substance. Yet the narrow scope of deliverables reflected Beijing's reluctance to address core EU concerns, while Brussels faced down parallel pressures from transatlantic trade disputes and Russia-Ukraine negotiations. More a crossroads than a jubilee for Brussels, the summit highlighted the weight of unresolved trade frictions and China's deepening ties with Russia. Looking ahead, EU–China relations will depend less on the summit's tentative signals than on whether Beijing heeds the EU's reinforced red lines or simply waits out Brussels under mounting external pressures.

Introduction

The 2025 EU-China Summit in July was unusual by multiple metrics. Despite marking 50 years of diplomatic relations, it had little fanfare such a milestone would usually attract, unfolding against the backdrop of heightened bilateral tensions and proliferating policy conflicts in the preceding weeks. For a second consecutive time, Beijing hosted the summit, breaking with the longstanding convention of rotating the venue between the EU and China. The underlying uncertainty raised doubts over whether President Xi Jinping would personally attend, and notably, the Chinese side cancelled the summit's planned second day. Nevertheless, the meeting yielded a handful of tangibles, if limited, outcomes—both in substantive policy terms and in diplomatic tone—but the narrow scope underlined Beijing's reluctance to overly concede to core EU concerns. Looking ahead, the key question is whether these tentative signals will translate into action, or whether structural constraints—including the Ukraine war and persistent economic asymmetries—push the EU-China relationship toward deterioration.

> *The 2025 EU-China Summit took place against a backdrop ranging from cautious optimism to frosty skepticism, with EU leaders eager to address stalling trade talks, recent Chinese export controls, and the broader implications of Beijing's deepening relationship with Russia—an increasingly central factor in Brussels' assessment of bilateral ties.*

From Thaw to Mounting Tensions

Throughout early 2025, EU-China relations oscillated between tentative engagement and sharp frictions, shaped by symbolic gestures, ongoing trade disputes, and Sino-Russian relations. Ultimately held in Beijing after months of speculation, the 2025 EU-China Summit took place against a backdrop ranging from cautious optimism to frosty skepticism, with EU leaders eager to address stalling trade talks, recent Chinese export controls, and the broader implications of Beijing's deepening relationship with Russia—an increasingly central factor in Brussels' assessment of bilateral ties.

Initial efforts to steer relations onto a more amicable course followed a behind-the-scenes charm offensive by Beijing since September 2024. Since then, Chinese institutions had gradually re-engaged their EU counterparts across multiple working levels, a sharp contrast to the adversarial stance of the incoming Trump administration, especially evident at the Munich Security Conference in February. The re-engagement led to the creation of economic working groups and revived exploratory talks on replacing the EU's tariff regime on Chinese EVs with import price floors after EU trade chief Maroš Šefčovič's Beijing visit in March.[1] For Brussels, it was essential to avoid a scenario where U.S. tariffs not only harmed EU industries, but also rediverted additional Chinese trade flows towards Europe. In an April 8 phone call with Premier Li Qiang, Commission President Ursula von der Leyen notably stressed Europe's and China's joint responsibility to support a strong reformed trading system in response to the "widespread disruption caused by the U.S. tariffs."[2] Meanwhile, Qiang said EU-China relations showed "momentum of steady growth."[3]

That same month, the European Parliament confirmed that China had lifted counter-sanctions on five EU lawmakers, initially imposed in retaliation for the EU's 2021 Xinjiang sanctions. This was later clarified to extend also to retired lawmakers, such as Green MEP Reinhard Bütikofer.[4] The European Parliament reciprocated by ending its own ban on engaging Chinese institutions while EU lawmakers remain under sanctions.[5] The reciprocal lifting of engagement barriers offered a rare window for more constructive dialogue, even as substantive disagreements persisted and member-states' pre-summit priorities diverged. For instance, on April 11, Spanish Prime Minister Pedro Sanchez had met President Xi in Beijing, describing China as an "essential partner" in fighting climate change, while a month later, Czechia attributed a cyberattack on its foreign ministry to a Chinese state-backed group, receiving solidarity support from the EU Council.[6] Over the same period, the engagement window quickly closed.

EU negotiators threatened to walk away from trade talks altogether in mid-May. Key frictions included stalled negotiations progress, intensified trade and procurement probes, and new Chinese export controls on rare earths.[7] Announced on April 4, the national-security-linked controls were widely seen as a countermeasure against the Trump administration's tariff hikes and AI export controls, with EU companies caught in the cross-fire—either inadvertently or as an implicit secondary pressure target. While Chinese Commerce Minister Wang Wentao proposed a "green channel" to ease export licenses to Europe, the European Parliament criticized the controls as "unjustified" and urged the Commission to reject any attempt to use them as leverage.[8]

The EU subsequently cancelled the pre-summit EU-China High Economic and Trade Dialogue and included two Chinese financial institutions in the 18th sanctions package on Russia,[9] thus marking an escalation from prior sanctions packages that had targeted individual companies and persons accused of sanctions-evasion. The July 2025 measures broadened the scope to address more systemic support, including financial channels and dual-used trade streams.[10] The PRC Ministry of Commerce denounced the inclusions as illegitimate and later authorized countersanctions on two Lithuanian banks under its Anti-Foreign Sanctions Law, albeit after the summit had already taken place. [11]

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This sanctions volley highlights the growing entanglement of economic frictions with broader Russia-linked tensions. Earlier in the year, President Xi Jinping had declined an invitation to visit Europe, adhering to the long-standing practice of attending EU-China summits only on Chinese soil. Despite exploratory efforts to arrange a European state visit to justify Xi's presence, Beijing remained firm in its refusal.[12] As a result, von der Leyen and Council President António Costa had to travel again to Beijing for a face-to-face meeting with Xi, who had not met both EU institution leaders together since 2023. While that had been deemed a worthwhile trade-off, it was particularly grating to see Xi subsequently attend the Kremlin's May 9 Victory Parade.[13] This symbolically charged visit—followed by Beijing's parallel de-escalation in the trade war with Washington—marked a visible shift in the previously defrosting trend in EU-China dynamics.

Tensions escalated further with von der Leyen striking a markedly sharper tone on Chinese manufacturing at the June G7 summit, and subsequently on Beijing's trading ties with Russia in her July China Policy speech to the European Parliament. In arguably her strongest language yet, she described China's "unyielding support" as "de-facto enabling Russia's war economy" and reiterated that these ties would a "determining factor" for the future of EU-China relations.[14] Steadily diverging views had become increasingly apparent after the July 2 meeting between HR/VP Kaja Kallas and

Foreign Minister Wang Yi. When Kallas repeated her call for China to halt exports of all dual-use goods to Russia, Wang reportedly made private remarks that China cannot accept a Russian defeat, as this would allow the United States to turn its full strategic focus on China.[15] While China's Ministry of Foreign Affairs (MFA) later reiterated the official position, this apparent admission—alongside prior Ukrainian reports of captured Chinese nationals fighting in occupied Donbas—fueled the EU Council's increasingly firm stance.[16]

Limited Consensus and Constrained Deliverables

Summit scheduling remained unsettled until last moment: the MFA confirmed the top-level summit only three days in advance, after cancelling the second planned day in Hebei two weeks earlier and moving the downsized EU-China Business Leaders Symposium to the first day. [17] In line with precedent when substantive agreements are scarce, the summit itself received lukewarm coverage in China's state media, which focused on Xi's remarks while glossing over its limited deliverables.

Even so, von der Leyen and Costa secured a few symbolic gestures on climate change and trade, along with modest achievements such as an initial meeting with Xi at the Great Hall of the People, which von der Leyen called "excellent." This contrasted with the official readouts, where Xi struck familiar notes on cooperation and multilateralism, outlining three principles for stable EU-China relations—strengthening communication, enhancing mutual trust, and deepening cooperation while upholding multilateralism—yet making no reference to core EU concerns.[18] This contrast highlights a gap: symbolic gestures and signals offered grounds for cautious optimism, but substantive EU priorities remained largely unaddressed.

There were nonetheless some steps of progress made at the subsequent summit with Premier Li Qiang. Although von der Leyen and Costa covered different aspects of EU-China relations in their respective remarks, ranging from climate, trade, and security to wider geopolitics, the bilateral trading relationship was undoubtedly a top priority. Expectations for tangible progress were higher here than on geopolitics, including Russia-Ukraine, which saw only reaffirmations of entrenched positions, with the EU outlining China's continued interactions with the war as a "determining factor" for relations going forward. Von Der Leyen declared that the trading relationship had reached an "inflection point" where reciprocity and rebalancing was "essential for its survival," warning that while Europe would seek "pragmatic solutions" despite its differences with China, it would "always defend its interests."[19]

Reading between the lines, there were nascent signs of progress beyond the formal summit readouts. Although mistranscribed as "overcapacity" in the EU Commission's official readouts,[20] von der Leyen's verbal comments on China's industrial production deliberately invoked "involution" (内卷, nèijuǎn)—a term Xi Jinping used himself at the July 1, 2025,

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Central Commission for Financial and Economic Affairs (CFEAC) to describe "out of control" competition. At that meeting, Xi called for urgent Party action to "manage low-price and disorderly competition," "promote the orderly exit of backward production capacity," and "smooth the path of converting exports to domestic sales." [21] Von der Leyen thus tactfully avoided the more contentious term "overcapacity," implicitly challenging Beijing to act on its own stated concerns.

While Chinese officials acknowledge overcapacity in traditional heavy industries, they resist applying the term to emerging green sectors, instead highlighting the urgency to scale up for global demand and the green transition.[22] In 2024, China installed twice as much wind and solar capacity as the rest of the world combined, with falling renewable prices supporting global decarbonization.[23] Yet rapid expansion and persistent price undercutting also create imbalances that risk distorting markets and eroding long-term sector sustainability. Premier Li acknowledged these growing supply-demand imbalances, albeit stressing China's advantages in scale, innovation and infrastructure over government support.[24] After the summit, von der Leyen highlighted the efforts to address the "issue under the term involution," including a willingness to support more consumption over production.[25] Strategically, adopting a shared vocabulary for the problem increases the likelihood of future progress.

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Alongside rare earths announcement came a set of smaller, low-hanging-fruit deliverables, including improvements in technical cooperation on emissions trading systems, the implementation of a joint roadmap on the circular economy, a new dialogue on financial regulation, and work to extend the protection of geographical indications.[27] The downsized EU-China Business Leaders Symposium with 60 business leaders likewise emphasized the importance of dialogue, but neither produced any new Memorandums of Understanding nor elicited much media attention.[28]

Although the two sides failed for the fifth consecutive year to agree on a joint communiqué, the summit nonetheless produced the first separate agreement on climate change since 2018, marking the 10th anniversary of the Paris Agreement. The Commission initially resisted Beijing's requests to include the agreement at all, citing its lack of clear targets.[29] Though much of the final statement remained non-quantifiable and employed Beijing's preferred language, such as describing green as the "defining color" of EU-China relations, it nonetheless included a commitment to update their respective Nationally Determined Contributions

(NDCs) before COP30.[30] While this fell short of an immediate pledge to cut greenhouse gas emissions, it suggests Beijing partly yielded to EU pressure. Brussels hopes this joint signal of heightened green ambitions will generate momentum ahead of COP30 and demonstrate Beijing's seriousness on climate cooperation, especially pertinent after the Trump administration's re-withdrawal from the Paris Agreement.[31]

The Post-Summit Outlook

As the EU-China Summit concluded with limited tangible outcomes, post-summit pessimism among European officials and analysts was palpable. While the joint statement on climate change and rare earth dialogue may have offered some evidence of constructive engagement, the major issues and persistent irritants in the relationship remain unresolved, leaving only tentative prospects for real action in the coming months.[32]

Beijing's seeming reluctance to overtly address EU core concerns suggest a Chinese leadership either confident in its position—believing that Europe, fragmented, reactive, and preoccupied, will eventually come around—or that Russia-Ukraine remains too big a factor and must be resolved first. Either way, this perception is likely reinforced by the EU's parallel trade challenges with its other leading trading partner, the United States.

On July 27, 2025, the Commission decided not to trigger its prepared €93 billion counter-tariffs against the U.S., effectively accepting President Trump's asymmetrical 15 percent tariff and his contested characterizations of transatlantic trade flows. The move has exposed EU divisions and a reluctance to deploy economic leverage.[33] Though the details and technical feasibility of the interim deal remain contested, it has yet to deliver the "stability and predictability" touted by President von der Leyen.[34] From Beijing's perspective, Brussels' apparent acquiescence to Washington may both signal a vulnerability to Chinese pressure in the future and diminish incentive to engage with an EU that, at least for now amid the Ukraine war, is seen as too closely aligned with the U.S.

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On the same day that von der Leyen agreed to the new U.S. tariffs, top U.S. and Chinese trade officials met for talks in Stockholm, agreeing two weeks later to extend their tariff truce another three months.[35] Though the prospects for a durable U.S.-China trade agreement remain uncertain, the negotiations followed a retaliatory tit-for-tat spiral to near-embargo tariffs between April 2 and May 14. Since then, Beijing not only renegotiated the interim reduction in U.S. tariffs down to 30 percent, it also secured a partial reversal of U.S. export controls on AI chips by July.[36] By engaging the U.S. from a position of heightened leverage, including with rare earth exports, Beijing has thus strengthened its relative bargaining position compared with early spring, when momentum for re-engagement with Brussels was at its peak.

Long treasured by President Trump, the prospects for a leadership meeting with Xi Jinping this fall further raises chances for easing bilateral frictions. Meanwhile, given Trump's unilateral inclinations, unfinished EU-U.S. negotiations on highly disputed non-tariff barriers, and disdain for European integration, any broader coordinated transatlantic front on China's trade practices remain unlikely beyond limited sector-specific cooperation, such as the new U.S.-EU Steel alliance.[37] Coupled with dwindling U.S. popularity in Europe, such dynamics further incentivize Beijing to maintain its wait-and-watch approach with the EU, preserving leverage while avoiding concessions not yet necessary.

Key issues to watch in EU-China relations in the coming months include China's anti-involution regulatory push, pre-COP emissions pledges, and developments related to Ukraine. In the short term, the effectiveness of the upgraded export control dialogue will be a key test of whether China can meaningfully address EU concerns over slow licensing approvals. Similarly, China's pledged update to its NDC under the Paris Agreement will serve as a key gauge of whether EU-China climate cooperation can be partially insulated from broader trade and security tensions.

Looking further ahead, the draft proposals of China's 15th Five-Year Plan (2026-2030), expected at the October CCP Plenary, may indicate how much of the anti-involution agenda will shape regulatory priorities and what further policy levers will be used to boost domestic consumption.[38] Whether aimed at assuaging tensions with the EU and other trading partners or pursuing Beijing's own objectives in combatting involution, any such structural changes will shape economic policies for the years to come. Meanwhile, the Russo-Ukrainian War, and the extent to which China's trade with Russia triggers further EU sanctions, will remain a "determining factor" for the broader EU-China relationship, either alleviating or exacerbating tensions.

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