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Sino-European Relations During Donald Trump's Second Term

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Abstract: The United States' tariff threats - and their subsequent enforcement - have ramifications that extend well beyond bilateral trade relations. They disrupt the global trading system as a whole. During his second term, President Donald Trump planned to extend new tariffs to the world's two other major trading blocs: China and the European Union. These two powers, already embroiled in mutual trade tensions, had imposed tariffs on selected goods from one another. In this context, a key question arises: to what extent has the U.S.-driven trade war influenced the course of Sino-European trade negotiations? Has it compelled both parties to reassess their strategies and move toward closer coordination? By examining the decisions taken by China and the EU, especially in comparison to the positions adopted during Trump's first term, we observe a notable hardening of positions on several fronts.

Both actors, though long-time advocates of free trade, have shifted away from this principle under increasing geopolitical and economic pressure. While U.S. influence partly explains the EU's firmer stance toward China, the trend reflects a deeper and more enduring transformation in Sino-European trade relations.

Keywords: China; European Union; trade policy; protectionism; geopolitics.

JEL Classification: F12; F14; F51; F62.

Introduction

Reducing the U.S. trade deficit has become the central objective of the trade policy pursued by the second Trump administration. Since April 2, 2025 - designated "Liberation Day" by Donald Trump - the United States has adopted an overtly protectionist trade agenda that is reshaping the global economic order and destabilizing international trade. During his first term, Trump had already waged a trade war against China and engaged in confrontations with other major trading partners, including the European Union as well as Canada and Mexico, members of the North American Free Trade Agreement (NAFTA). This earlier wave of protectionism disrupted global supply chains and marked a turning point in the worldwide resurgence of economic nationalism.

The second Trump administration's trade policy is broader and more ambitious in scope, targeting nearly ninety countries. On April 5, 2025, the United States imposed a universal 10% tariff on all imports - a measure that President Trump described as a "reciprocal tariff," justified by the alleged non-tariff barriers faced by American firms abroad. This sweeping policy has prompted major global economies to seek closer engagement with Washington in the hope of securing new trade agreements and restoring a measure of stability in their exchanges with the world's largest economy. In August 2025, the European Union and the United States concluded an "Agreement on Reciprocal, Fair, and Balanced Trade," which, despite its title, appeared rather one-sided: it established 15% tariffs on European goods while leaving American exports to Europe untaxed.

In China's case, negotiations have proved more protracted. As the primary target of the Trump administration's new trade doctrine - largely due to the sizeable U.S. trade deficit with China, which reached 295.5 billion dollars in 2024 - Beijing faced an escalating series of tariffs between April and May 2025, peaking at 135% on Chinese imports before a truce was declared on May 12. Talks between the two economic powers have continued since. However, the Chinese Ministry of Commerce's decision on October 9, 2025, to expand an export

licensing system for most rare earth elements - a sector in which China dominates the global market - reignited tariff threats from Washington.

This article examines the potential consequences of U.S. trade policy toward the European Union and China for Sino-European relations since April 5, 2025. Has American protectionism deepened the rift between China and the European Union, whose relations had already deteriorated since 2021? Or, conversely, can signs of coordination between Brussels and Beijing be discerned, aimed at mitigating - or even exploiting - the effects of U.S. protectionism? The central question our analysis seeks to answer is therefore the following: how might the China - United States - European Union triangle evolve during Donald Trump's second term? While Sino-American relations have been extensively scrutinized by scholars and the international media, the implications of these developments for the European Union - nonetheless the world's third-largest economic power - have received comparatively little attention. The hardening of U.S. trade policy has undeniably sharpened tensions between China and the EU; yet these tensions cannot be explained solely by Trump's brand of protectionism but must also be understood in the light of broader geopolitical dynamics.

1. Literature Review

The impact of protectionist measures on global trade has been extensively examined in academic literature. Economic historians such as Findlay and O'Rourke (2009) have shown that the surge of protectionism in the 1930s led to a significant slowdown in global growth. There is now broad consensus regarding the detrimental consequences of protectionist policies for the world economy - a point regularly emphasized by the International Monetary Fund, whose economists consider such measures to be counterproductive (Cherif and Hasanov, 2024). Nevertheless, recent years have witnessed a growing challenge to the principles of free trade (Chenou, Leiteritz and Urrego-Sandoval, 2025), potentially signaling the end of globalization as we have known it (Papadimitriou, Yajima and Zezza, 2025).

From a historical perspective, however, protectionism is far from a novel feature of U.S. economic policy. As Philippe Barbet (2025) observes, "Trumpian protectionism" stands within a long American tradition traceable to President William McKinley (1843–1901), who likewise raised tariffs in the name of national economic interest. Similarly, in the 1930s, in response to the prevailing protectionist climate, the United States again increased its tariffs. It was only in the aftermath of the Second World War that Washington began to advocate, on the international stage, for the removal of tariff and non-tariff barriers in order to facilitate the global expansion of American business. Yet, beginning in the 1970s, the United States returned to a more defensive trade posture in response to Japan's rapid economic ascent - particularly the surge of Japanese automobile exports to the American market (Nelson, 1996).

The transatlantic trade dispute between the European manufacturer Airbus and the American firm Boeing (McCrohan, 1983) further illustrated this persistent tendency toward reciprocal protectionism, a pattern that continued well into the twenty-first century. The trade policy pursued by the second Trump administration thus represents not a rupture, but rather an intensification of a long-standing dynamic that had already begun during his first term.

The first U.S. - China trade war, initiated in 2018 and partially suspended under President Joe Biden through the "Phase One Trade Deal," has been the subject of extensive analysis (Fajgelbaum and Khandelwal, 2022). Scholars have examined its effects on the global economy (Itakura, 2019), on wages (Guo, *et al.* 2018), and on technological transfers (Liu & Woo, 2018). As the world's two largest economies, the United States and China exert profound spillover effects on third countries, and the conflict prompted shifts in global production chains. U.S. tariffs on Chinese goods indirectly benefited other economies such as Vietnam (Choi and Nguyen, 2023), whose exports became more competitive on the international market (Fajgelbaum *et al.* 2024). This first trade war arguably deepened global divisions and accelerated a process of economic decoupling between Chinese and American firms, raising the prospect of a world divided into rival economic blocs (Kwan, 2019).

Yet Europe's position within this emerging U.S. - China rivalry remains underexplored. Although some studies suggest that the European Union may have benefited in the short term from the U.S. - China trade conflict (Dang, Krishna and Zhao, 2023), the long-term implications for the EU's strategic autonomy and global competitiveness are less clear. Moreover, relations between China and the European Union have been deteriorating for several years - independently of the U.S.-China trade war. The European Commission's designation of China as a "systemic rival" in March 2019 (European Commission, 2019) marked a turning point in Sino-European relations and signaled the end of a period of relative European naivety toward Beijing's global ambitions.

2. Methodology

The analysis presented in this article is based on a qualitative approach drawing upon both primary and secondary sources to assess the impact of U.S. trade policy on Sino-European relations since April 5, 2025. Our objective is to intersect economic and geopolitical dynamics in order to better understand how the protectionist agenda of the second Trump administration has directly or indirectly shaped the respective positions of Beijing and Brussels.

Primary sources include official statements and press releases issued by the European Commission and China's Ministry of Commerce, as well as the main trade agreements concluded or proposed between April and October 2025. These documents provide valuable insights into each actor's stated priorities and negotiating strategies. In parallel, the article conducts a comparative analysis of European and Chinese responses to U.S. trade policy, highlighting convergences and divergences in their strategic orientations.

Finally, this study adopts both a contextual and forward-looking perspective, situating current developments within the broader trajectory of deteriorating Sino-European relations observed since 2021.

3. Research Results

3.1 Europe's Openness to Coordination with China

The European position has primarily been one of coordination with China in response to U.S. tariffs: both Brussels and Beijing seek to maintain stability and avoid unnerving global markets. In the days following President Trump's announcement of new tariffs, stock markets experienced heightened volatility. On April 7, European Commission President Ursula von der Leyen and Chinese Premier Li Qian discussed the situation, issuing a joint statement emphasizing the importance of predictability in the global economy and the need to de-escalate tensions. This conciliatory approach did not prevent the European Commission President from urging China to provide greater market access for European companies (European Commission, 2025a).

The issue of trade barriers and tariffs was also addressed during the 25th EU - China Summit, held in Beijing on July 24, 2025. The European side emphasized the need for "fairness" and equity in Sino-European trade, while both parties committed to preserving multilateralism and deepening dialogue. Despite these more consensual declarations compared to the often-tense Sino-American meetings, the substantive topics remained largely the same: tariffs on European and Chinese products and access to rare earths. While both the EU and China face U.S. tariffs, Europe also remains concerned about China's strategic export restrictions.

3.2 The Rare Earths Question

Like the United States, the European Union confronts Chinese-imposed restrictions on rare earth elements. China controls 70% of global rare earth extraction and 85% of global refining capacity. These elements are essential for artificial intelligence and the energy transition (Depraeter and Goutte, 2023). In contrast to China, the EU possesses no domestic rare earth resources (Kim *et al.* 2025) and is thus heavily dependent on Chinese supply.

In early April, Beijing announced the implementation of export controls on certain rare earth elements, with five additional elements added to the restricted list in October 2025. Chinese companies wishing to export rare earths must now obtain a license. Furthermore, China introduced an extraterritorial provision applying to any foreign company seeking to export products containing rare earths produced in China (Ministry of Commerce of the PRC, 2025). Beijing justified this measure by claiming that Chinese rare earths were being used in foreign military industries, but the policy is primarily a strategic tool to enhance Chinese political leverage (Li, 2025). This decision places the United States, the EU, and other countries seeking autonomy in AI and energy sectors in a difficult position.

Europe's stance is nuanced. The EU aims to increase its autonomy in rare earth production through initiatives such as the European Raw Materials Act, unveiled in March 2023, which seeks to secure access to strategic resources, including rare earths. By 2030, the EU intends that 10% of its annual consumption of strategic materials be sourced from domestic extraction, and no single third country may supply more than 65% of any resource on the list. The Act draws heavily on the U.S. mining strategy (Lapie, 2023, March). However, Europe's rare earth processing capacity remains limited, with only two facilities located in France and Estonia (Josephs, 2025), and no domestic extraction sites. To address this gap, the EU plans to create new partnerships with allied states through a "Critical Raw Materials Club" (Findeisen, 2023). Rather than confronting China directly, Europe seeks to strengthen multilateral cooperation, while remaining mindful of China's growing influence in Africa and Latin America.

3.3 Electric Vehicles and Anti-Coercion Measures

Similarly, EU member states do not hold a uniform position on Chinese electric vehicle tariffs. Nonetheless, some European leaders have expressed a willingness to respond more firmly to Chinese restrictions. During the European Council on October 23, 2025, French President Emmanuel Macron suggested using all available tools - including the newly established anti-coercion instrument - to counter Chinese actions. Adopted in October 2023, this instrument was originally designed to respond to Chinese trade restrictions against Lithuania since 2021 (European Parliament, 2023). In addition to imposing measures against states engaging in dumping toward the EU, it allows the Union to implement countermeasures on trade and investment against countries applying coercive policies toward EU members.

Notably, President Macron had previously proposed using the instrument - referred to as a “bazooka” - to counter U.S. protectionism, though no consensus had been reached among EU members (Mancini, Adghirni and Valero, 2025). For the first time, following Macron’s remarks at the Berlin Global Dialogue, European Commission President Ursula von der Leyen publicly indicated that the instrument could be deployed in response to Chinese measures, declaring: “Europe cannot do things the same way anymore. We learned this lesson painfully with energy; we will not repeat it with critical materials” (European Commission, 2025b). Von der Leyen acknowledged that China’s rare earth export controls occur within a broader context of Sino-U.S. frictions but emphasized that the EU is also affected. The anti-coercion instrument could be relatively straightforward to implement, as it requires only a qualified majority rather than unanimity among member states (Schaupp, 2024), preventing a single state from blocking the decision.

3.4 Sino-European Trade Tensions

While the U.S. - China trade war dominates headlines, disputes between China and the EU persist. Like the United States, the EU faces a substantial trade deficit with China, which exceeded €300 billion in 2025. Brussels has accused Beijing of distorting free trade rules through subsidies in sectors such as solar panels, while China has, in turn, accused the EU of dumping certain products.

Even before Trump’s second term, the U.S. and the EU pursued similar approaches to shared disputes with China. In May 2024, the U.S. imposed 100% tariffs on Chinese electric vehicles under Section 301 of the Trade Act of 1974 for “unfair trade practices,” while the EU adopted a comparable, albeit smaller, 35% tariff in October 2024. This EU decision was divisive: Italy and France, with significant domestic automotive sectors, supported the measure, whereas Germany opposed it, fearing retaliatory tariffs that could restrict access to the Chinese market. Ten member states abstained from taking a position (IISS, 2024).

In response to EU measures on electric vehicles, China raised tariffs on selected European products. While Beijing denies retaliating against European measures, the tariffs targeted highly specific goods, such as Spanish pork - 20% of Spain’s exports (Gonzàles, 2025) - and French brandy, affecting Cognac producers already impacted by U.S. tariffs (Alderman and Bradsher, 2025). Targeting specific products may aim to disrupt EU unity.

Another example is the EU and U.S. response to Chinese fast fashion platforms, such as Shein and Temu. In April 2025, President Trump not only applied tariffs on Chinese goods but eliminated de minimis exemptions for parcels under €800 and tripled tariffs on these shipments, imposing a minimum \$100 charge per parcel. A European Parliament report noted that nearly 90% of low-value parcels entering the EU originate from China (European Parliament, 2025, July 9). While the EU plans to apply a modest €2 minimum tariff per parcel by 2028, some member states are considering earlier implementation. The discrepancy between U.S. and EU measures could incentivize Chinese platforms to pivot toward the European market.

European states have sometimes acted preemptively on strategic issues without waiting for EU-level directives. For example, in October 2025, the Dutch government blocked the acquisition of the semiconductor manufacturer Nexperia by Chinese parent company Wingtech to prevent potential technology transfers. Analysts suggest U.S. pressure influenced the decision (Xu, 2025), as Wingtech had been blacklisted as a national security risk (Quarles van Ufford, 2025.). Regardless of the degree of independence in decision-making, EU and U.S. interests appear closely aligned, limiting the potential for direct Sino-European coordination on strategic matters.

Nevertheless, China and the EU continue to cooperate on shared issues, particularly environmental concerns. On July 14, 2025, the sixth China - EU High-Level Environment and Climate Dialogue was held in Beijing to prepare for COP30 in Belém, Brazil. But this a long-term cooperation.

3.5 The Geopolitical Context in Sino-European Relations

The EU has historically promoted political reforms in China and remained critical of human rights, notably regarding the Uyghur minority in Xinjiang. This stance, for instance, blocked France from signing the Comprehensive Agreement on Investment proposed by the European Commission in December 2020 (Bouissou, 2020).

However, as of 2025, Europe's strategic priorities have shifted. Beyond human rights and Taiwan issue, the war in Ukraine dominates EU foreign policy and shapes its approach toward China. Initially, the EU viewed Beijing as a potential partner to influence Russia. During the 23rd EU–China bilateral summit on April 1, 2022, Ursula von der Leyen called on China to leverage its “uniquely close relations with Russia” to support peace efforts (European Council, 2022). By September 2025, at the UN General Assembly, she again encouraged Premier Li Qian to use China's influence to bring Russia to the negotiating table (Bonini, 2025). Yet these statements were largely formal; European leaders, like Ukrainian President Volodymyr Zelensky, no longer expect Chinese intervention (McCartney, 2025).

The EU's stance toward China has grown more assertive. In the 18th sanctions package against Russia (July 2025), the EU targeted two Chinese banks operating in Russia (Le Monde, 2025). In October 2025, the 19th package included additional Chinese firms, including two refineries and a PetroChina subsidiary, prompting a sharp response from the Chinese Foreign Ministry (Tao and Chen, 2025).

Geopolitical tensions have also highlighted the vulnerability of China's Belt and Road infrastructure. In early September, Poland closed its borders for roughly two weeks due to the presence of Russian drones and the Zapad-2025 military exercise on its frontier, suspending rail connections between Europe and China. Despite discussions between Polish Foreign Minister Radosław Sikorski and Chinese Foreign Minister Wang Yi on September 15, Poland maintained its position. Consequently, Central and Eastern European states (excluding Hungary), previously receptive to Beijing's Belt and Road Initiative and the 17+1 platform launched in 2012, have distanced themselves due to China's pro-Russian stance. The Czech Republic, for example, explicitly cited China as a potential source of instability in its 2023 defense strategy (Ministry of Defence of the Czech Republic, 2023).

Finally, the Sino-American trade war and the EU's derisking policies (Garcia-Herrero and Vasselier, 2024, October) have accelerated Brussels' search for new partners. After prolonged difficulties in negotiating a Comprehensive Economic Partnership Agreement, the EU and Indonesia reached a political agreement in July 2025, finalizing negotiations in September 2025 (European Commission, 2025, September). In April 2025, the EU and the United Arab Emirates launched talks on a free trade agreement, following stalled negotiations with the Gulf Cooperation Council (Karacsony, *et al.* 2025). For Europe and other global economic centers, Sino-American tensions have acted as a catalyst for developing alternative partnerships and supply chains less dependent on the two superpowers.

4. Discussions

The intensification of the U.S. - China trade war during President Donald Trump's second term has not fostered coordination between the European Union and China. Although the EU has also been subject to the tariffs introduced by Trump in April 2025, Brussels appears to pursue a policy broadly aligned with that of the United States, adopting a very US compatible approach in its dealings with Beijing. The instruments developed by the EU, as well as its ongoing efforts to achieve strategic autonomy, are largely modeled on American examples.

However, unlike the United States, the EU's internal structure creates a greater potential for divergence among member states. As a result, EU measures are generally less forceful than U.S. policies, leaving a relatively narrow window for constructive dialogue with China. At the same time, the war in Ukraine has strengthened European ambitions for autonomy, and Beijing's position on this issue suggests that future coordination between China and the EU will be increasingly challenging.

Overall, trade tensions among the United States, the EU, and China remain highly dynamic and complex. The ongoing series of negotiations, retaliatory measures, and policy decisions creates significant uncertainty, limiting the ability to anticipate long-term outcomes - a limitation acknowledged in this study. Far from fostering stability, this environment risks generating the very economic and political instability that Europe has sought to avoid.

Conclusions and Further Research

This analysis suggests that, despite shared exposure to U.S. protectionist measures, the EU and China have not developed a coordinated response. European policy, though inspired by U.S. strategic models, remains less cohesive and more restrained due to internal institutional divisions. While there is limited scope for dialogue and

cooperation with Beijing, the geopolitical context - particularly the war in Ukraine - reinforces the EU's drive for strategic autonomy, further complicating any potential Sino-European alignment.

The evolving triangular relationship among the United States, China, and the EU highlights a period of unprecedented uncertainty in global trade. The interplay of protectionism, strategic autonomy initiatives, and geopolitical tensions generate both challenges and opportunities for European actors. Looking ahead, the EU's ability to navigate these complexities will depend on its capacity to balance alignment with the United States, engagement with China, and the pursuit of its own autonomous strategic objectives.

Credit Authorship Contribution Statement

Sebastien Goulard: he named author is responsible for all of the following tasks: Conceptualisation, Investigation, Methodology, Formal analysis, Writing – original draft, review and editing.

Declaration of Competing Interest

The author declares that he has no known competing financial interests or personal relationships that could have appeared to influence the work reported in this paper.

Declaration of Use of Generative AI and AI-Assisted Technologies

The author declares that he has not used generative AI and AI-assisted technologies in the writing process before submission, but only to improve the language and readability of their paper and with the appropriate disclosure.

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