



# MERICs CHINA FORECAST 2025

## Survey results

Number of participants: 843

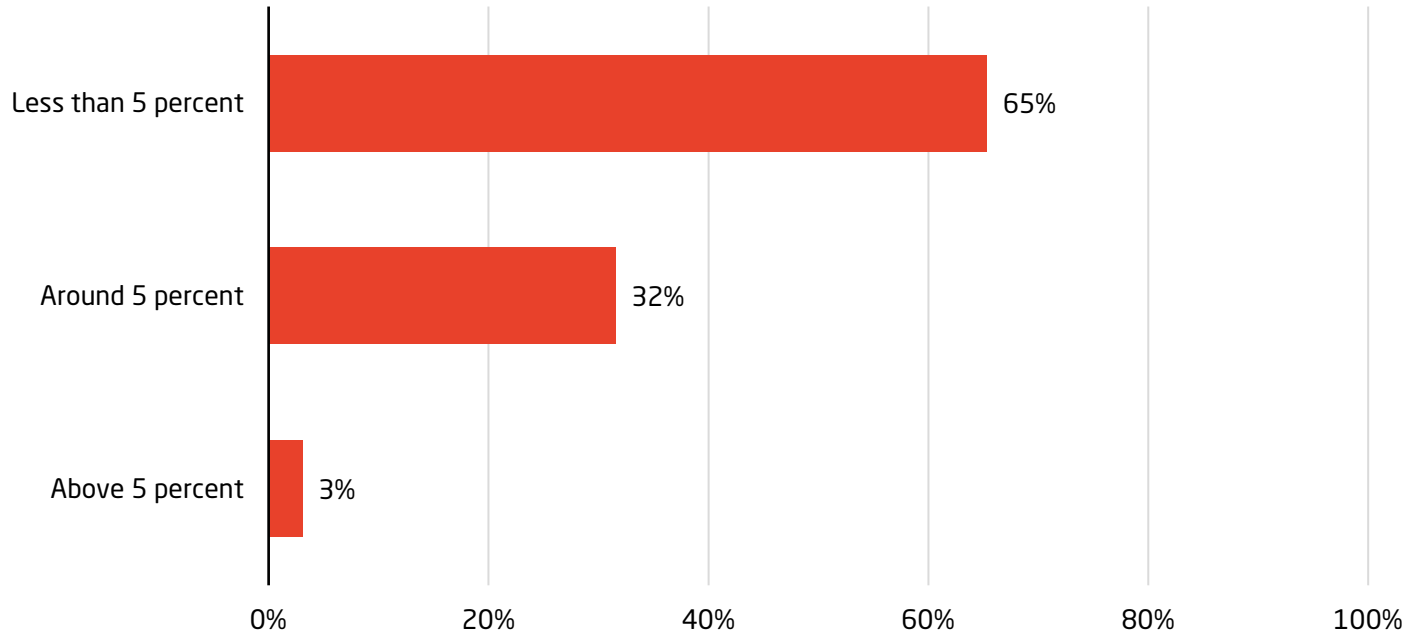
The survey was conducted online in November-December 2024



# Part 1: China's Domestic Development

# Doubts on China's outlook for economic growth in 2025

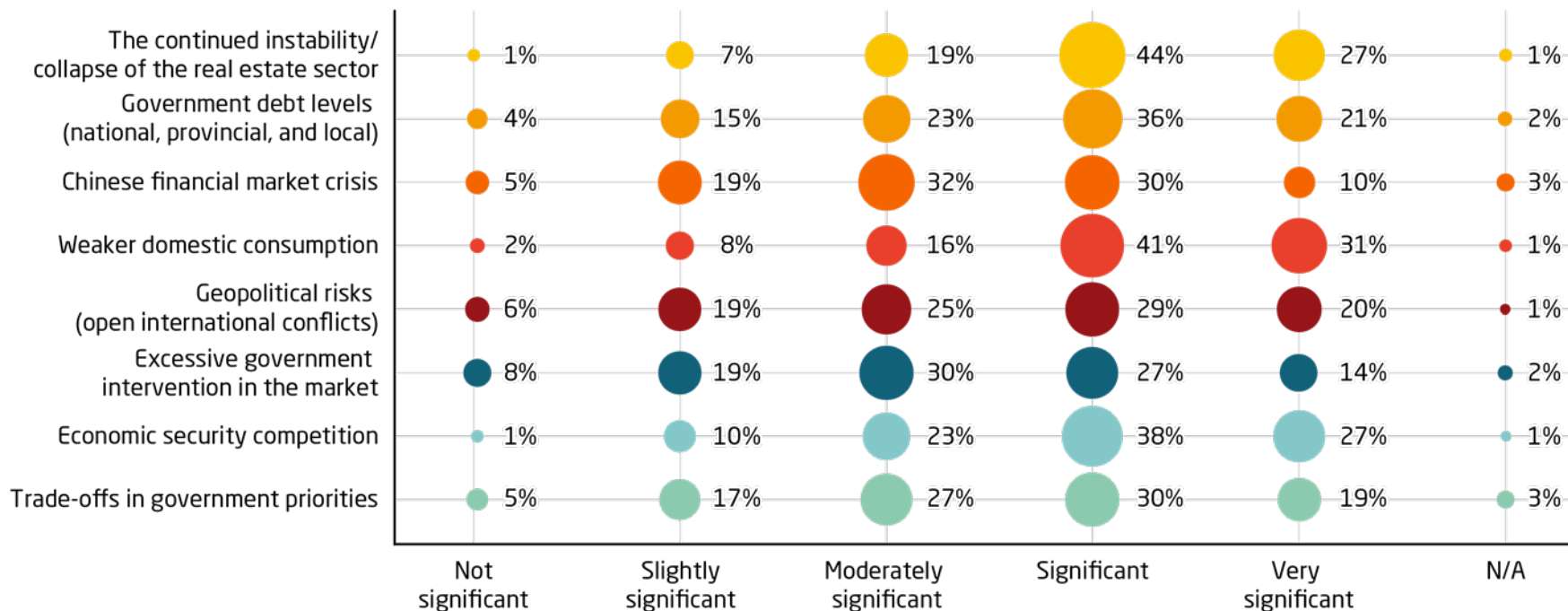
Q1: What do you think how much China's economy will grow in 2025?



# Real estate sector and weak consumption as risks for growth



Q2: In your view, which of the following are significant risks for China's growth outlook in 2025?

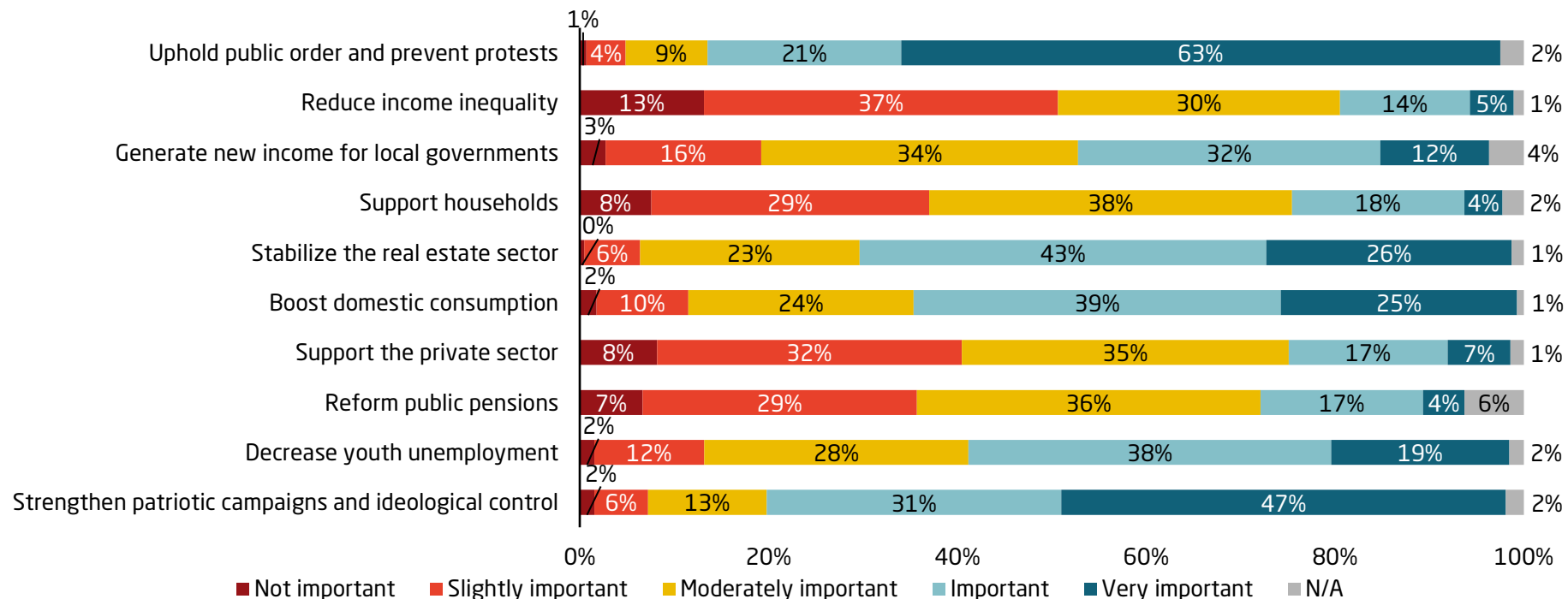


# Domestic issues: focus on public order and ideological control



MERICS  
CHINA FORECAST  
2025

Q3: In your view, what level of importance do you expect the Chinese Communist Party leadership to give to the following domestic issues in 2025?

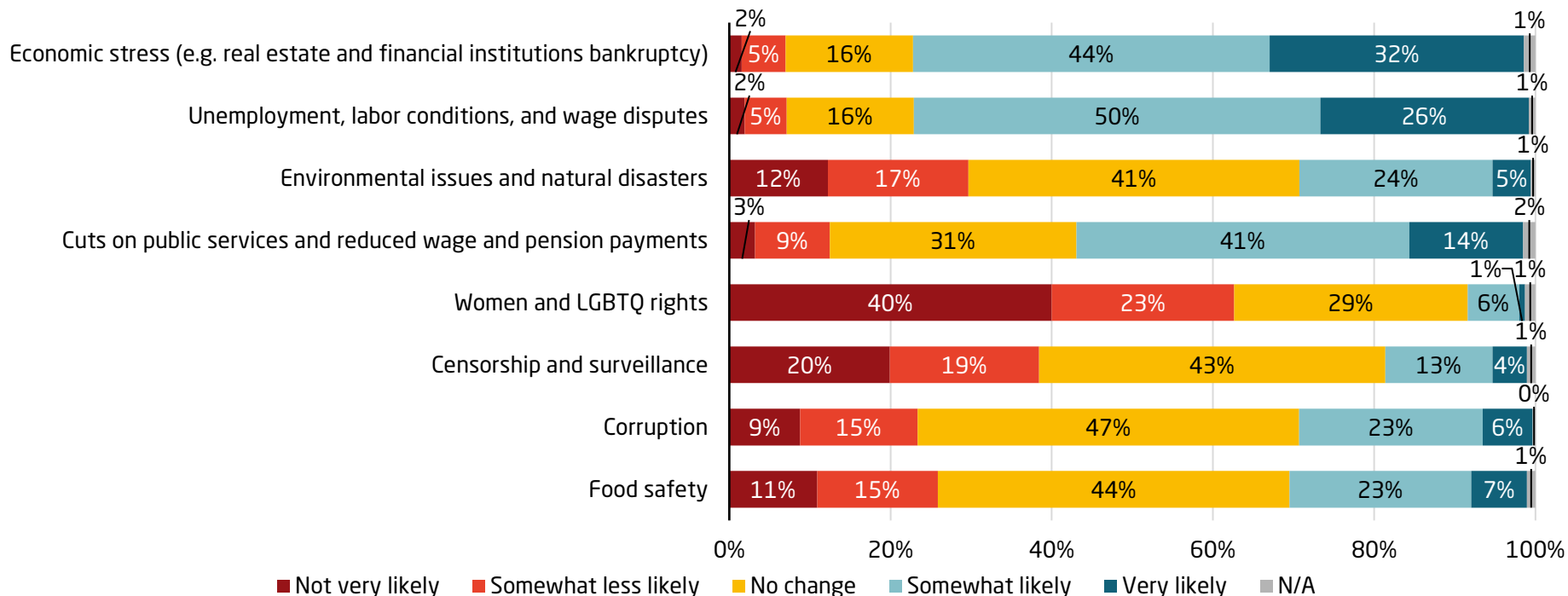


# Economic issues as likely sources of protests



MERICS  
CHINA FORECAST  
2025

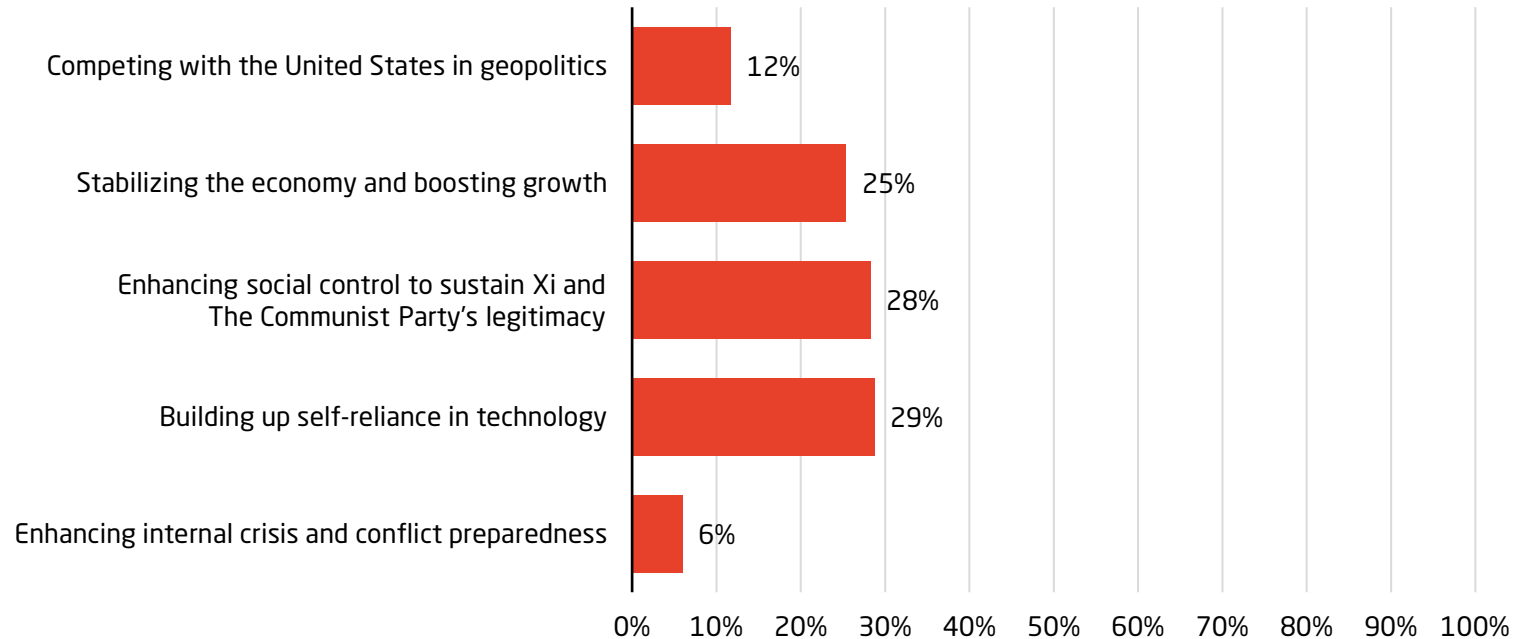
Q4: In your view, which of the following pressure points are likely to see public dissent and/or protests in 2025?



# Mixed views on Chinese leadership's top priority



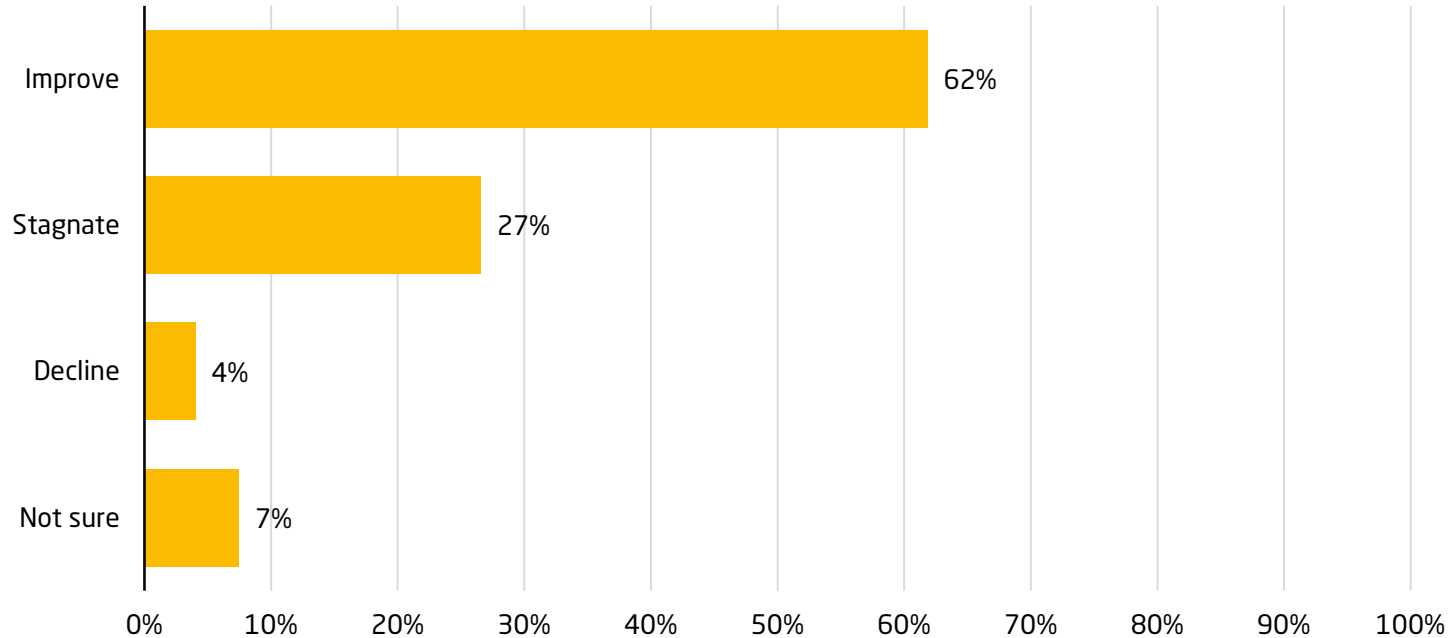
Q5: Which course of action do you see China's leadership taking up as their top priority in 2025?



# China's innovation capabilities expected to improve



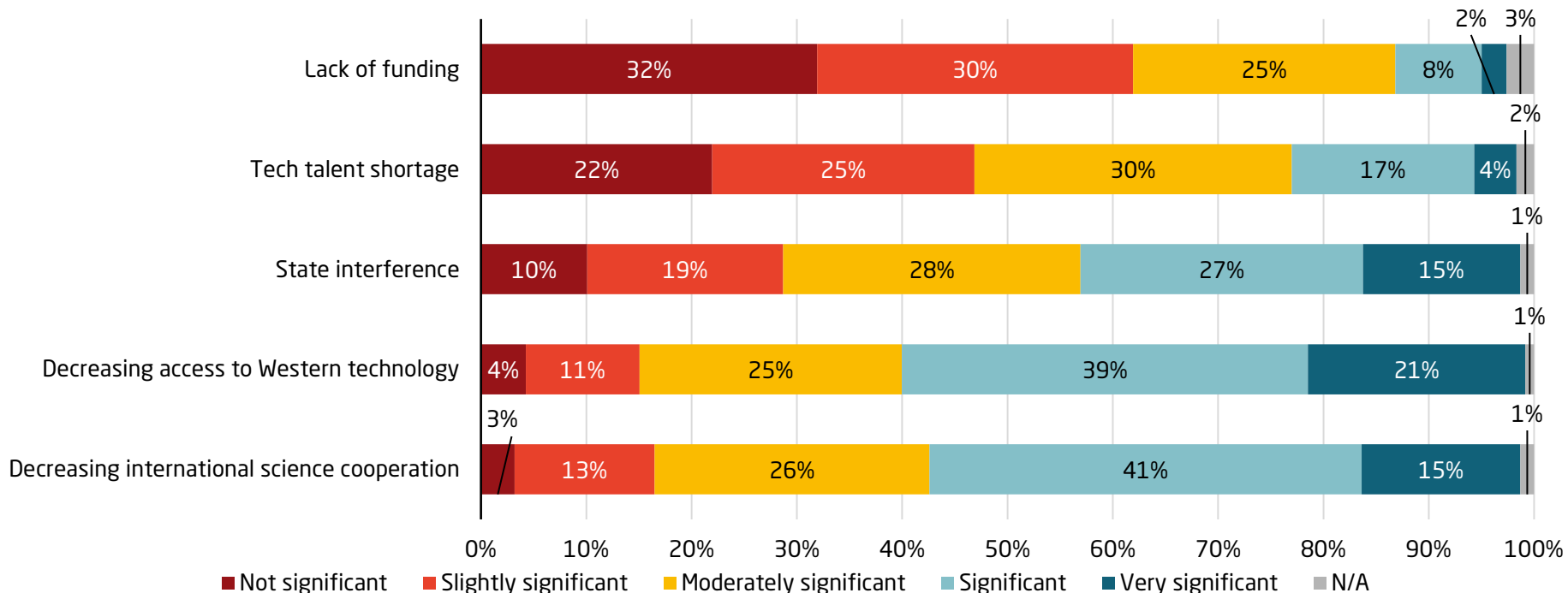
Q6: What is your overall outlook on how China's innovation capabilities will develop in 2025?





# Decoupling regarded as risk for China's r&d progress

Q7: In your view, which of the following are significant risks for China's research and development progress in 2025?



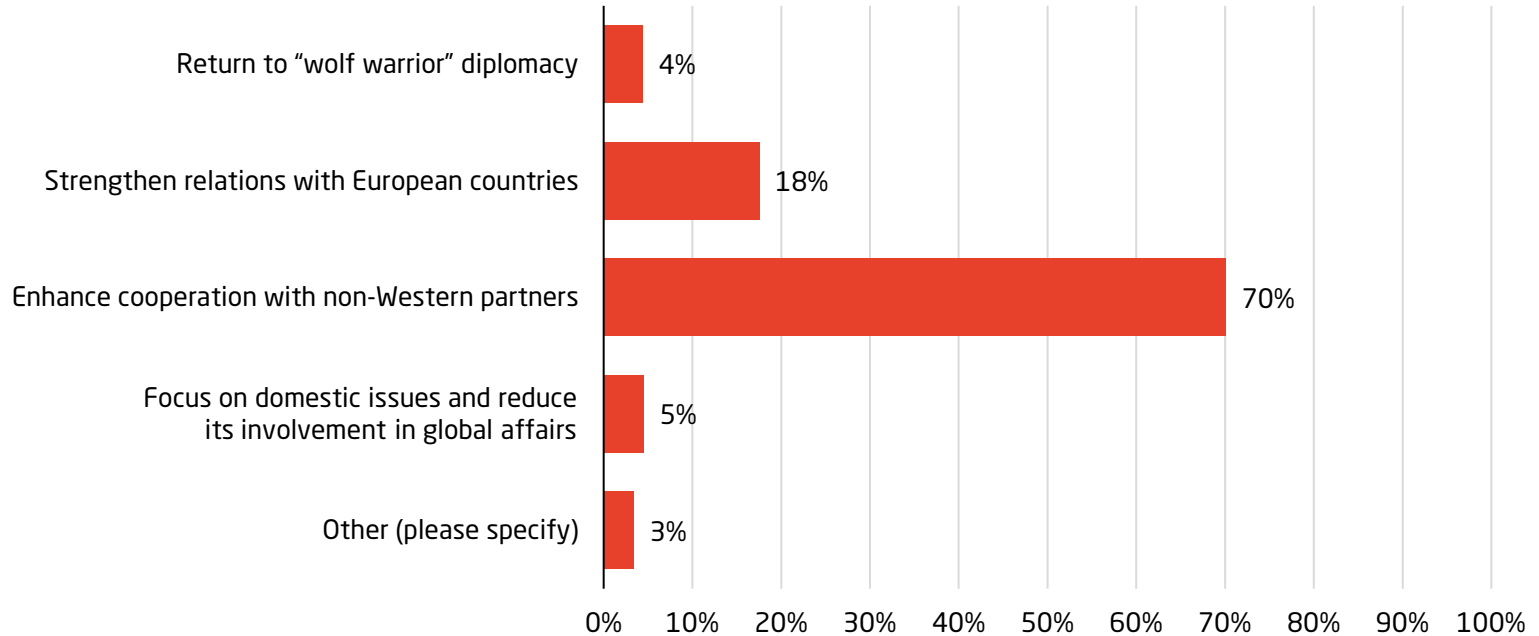


## Part 2: Foreign policy & EU-China relations

# China to enhance cooperation with non-Western partners



Q8: What do you think how China's foreign policy will develop in 2025?

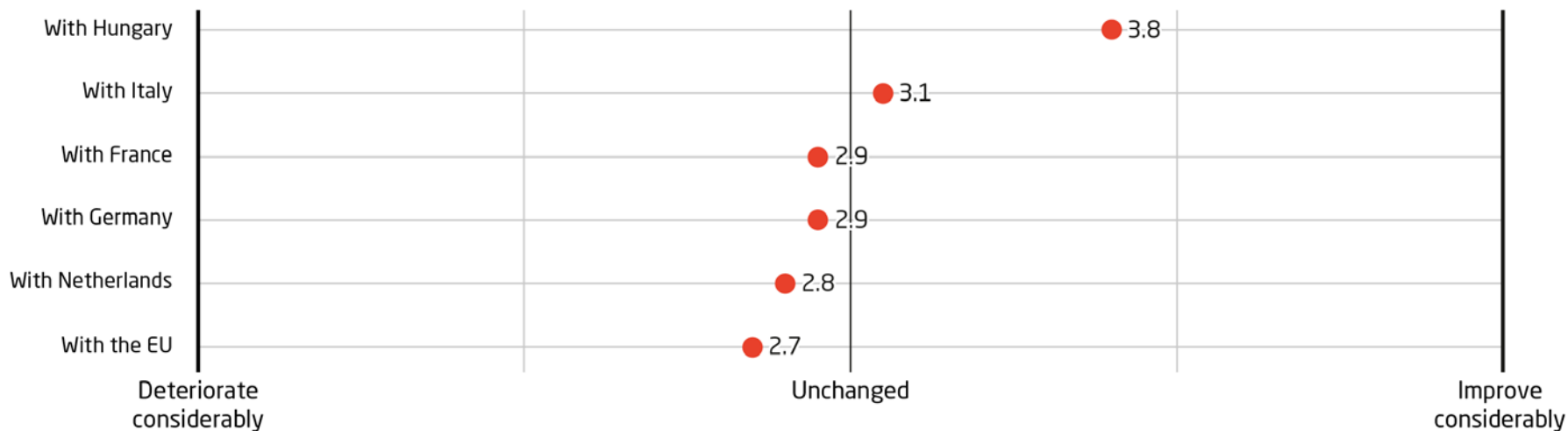


# Slight deterioration expected for China's relationship with EU



MERICS  
CHINA FORECAST  
2025

Q9: In your view, how will China's relations with the EU and its member states develop in 2025?



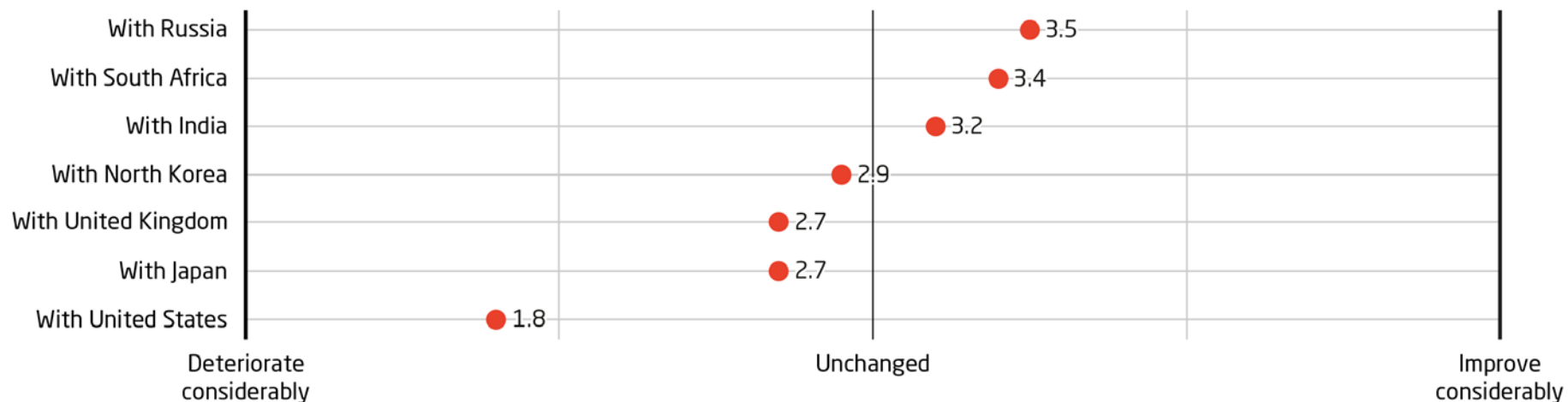
\* Weighted Average. Each category is assigned a score ranging from 1 (Deteriorate considerably) to 5 (Improve considerably). A score of 3 represents no changes.

# Mixed expectations for China's relations with non-EU states



MERICs  
CHINA FORECAST  
2025

Q10: In your view, how will China's relations with key non-EU states develop in 2025?

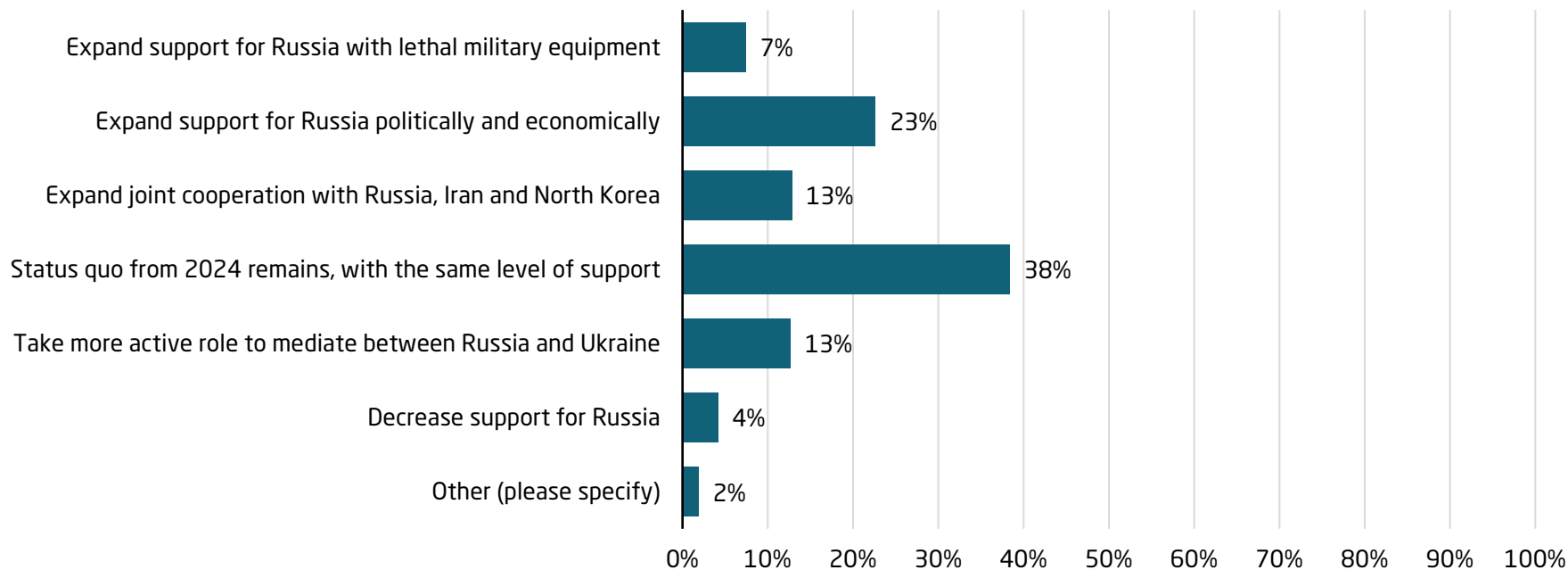


\* Weighted Average. Each category is assigned a score ranging from 1 (Deteriorate considerably) to 5 (Improve considerably). A score of 3 represents no changes.

# Mixed views on trajectory of China's support for Russia's war



Q11: In your view, how will China's relationship with Russia develop in 2025 in the context of Russia's war against Ukraine?

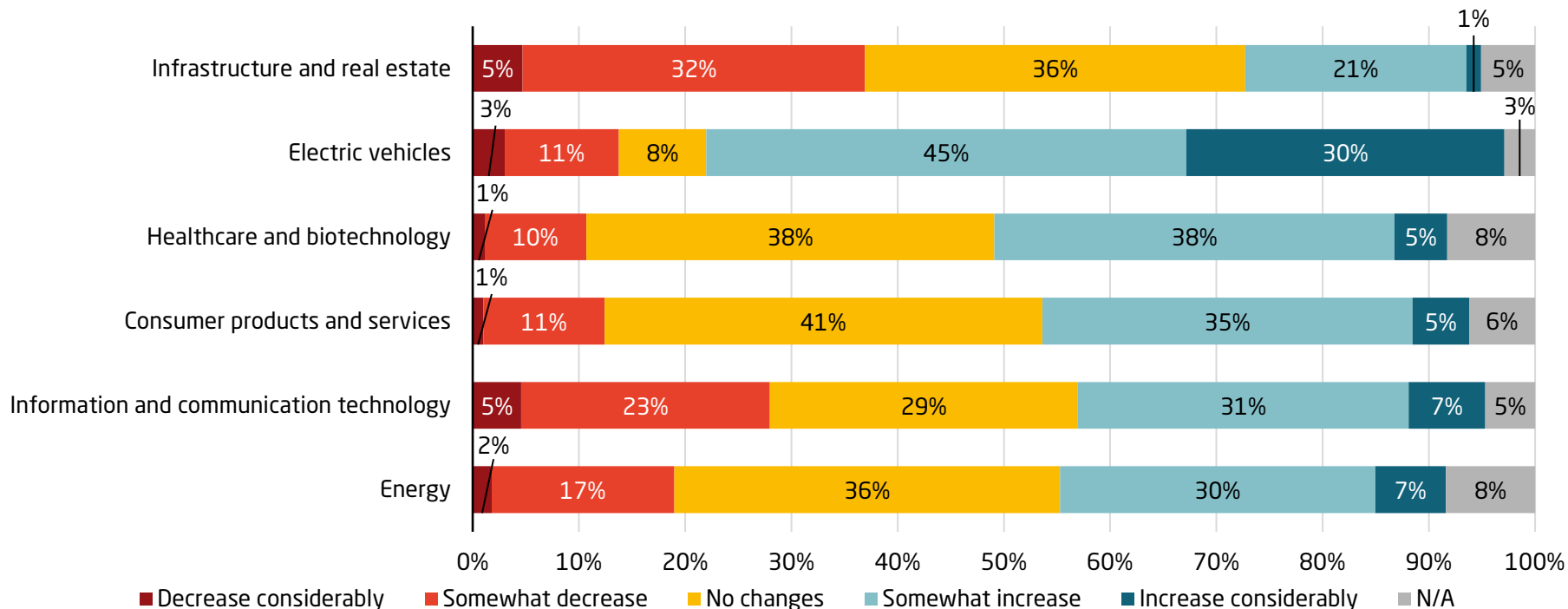


# Chinese FDI to increase in Europe's EV sector



MERICs  
CHINA FORECAST  
**2025**

Q12: How do you expect Chinese investment in Europe to evolve in 2025?



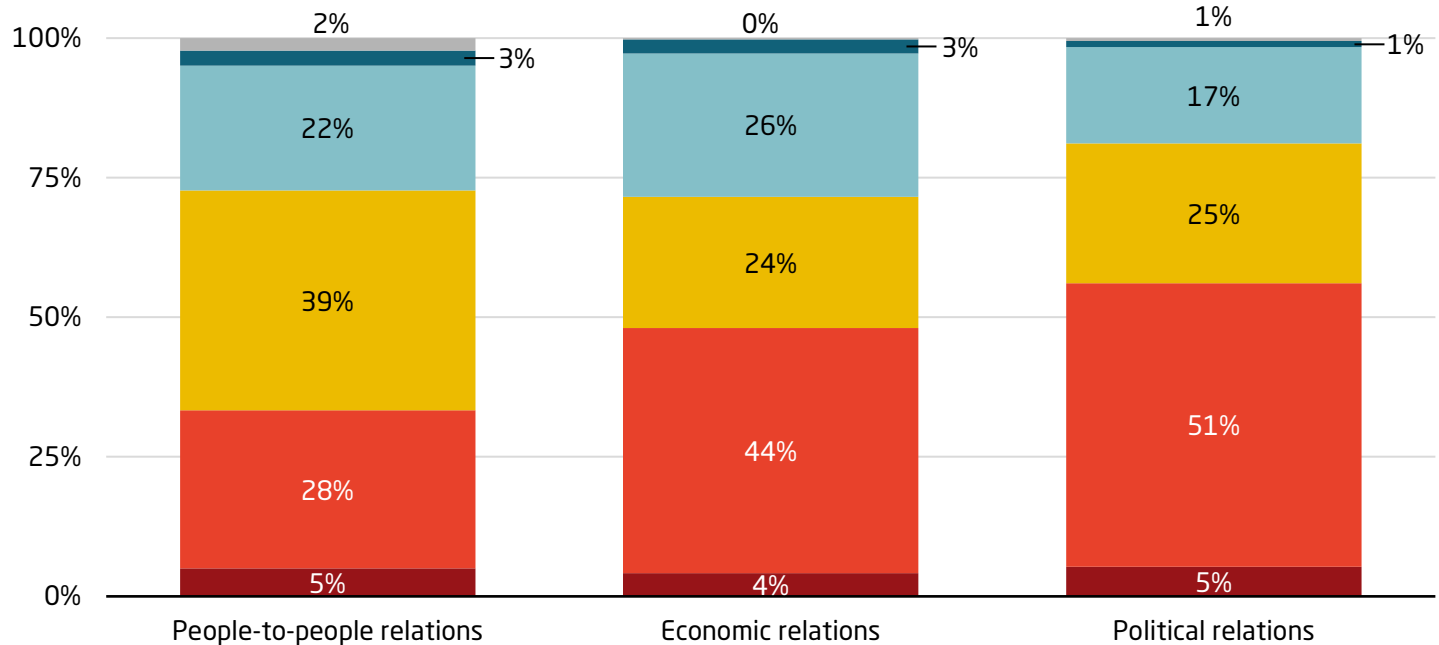
# Downturn in political relations between EU and China



MERICS  
CHINA FORECAST  
2025

Q13: How do you expect EU-China relations to evolve in 2025?

- N/A
- Improve considerably
- Somewhat improve
- No changes
- Somewhat deteriorate
- Deteriorate considerably

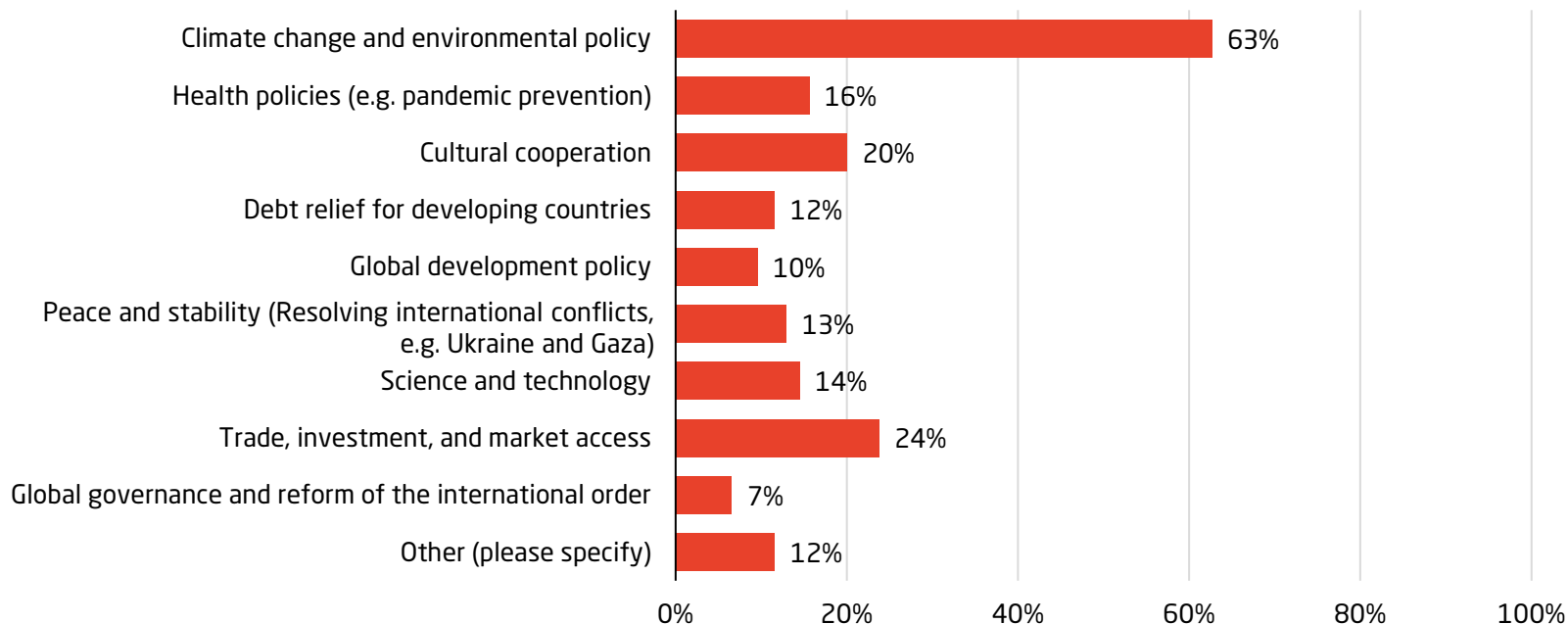




# EU-China cooperation likely in fight against climate change



Q14: In 2025, in which areas are the EU and its member states likely to make significant progress with regard to cooperation opportunities with China? Select up to 3 answers.

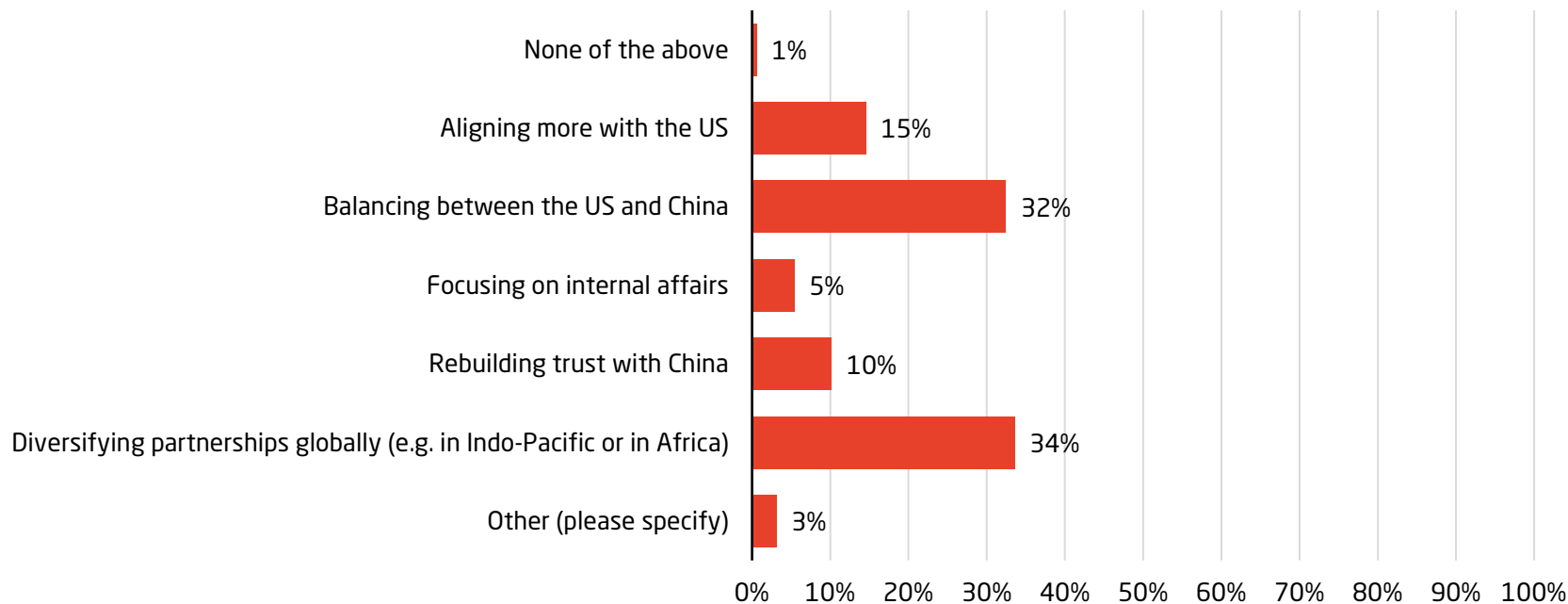


# China and Trump: EU should balance and diversify partnerships



MERICs  
CHINA FORECAST  
2025

Q15: In 2025, when it comes to transatlantic cooperation on China under the Trump administration, the EU and the majority of its member states should prioritize in their transatlantic agenda on China:

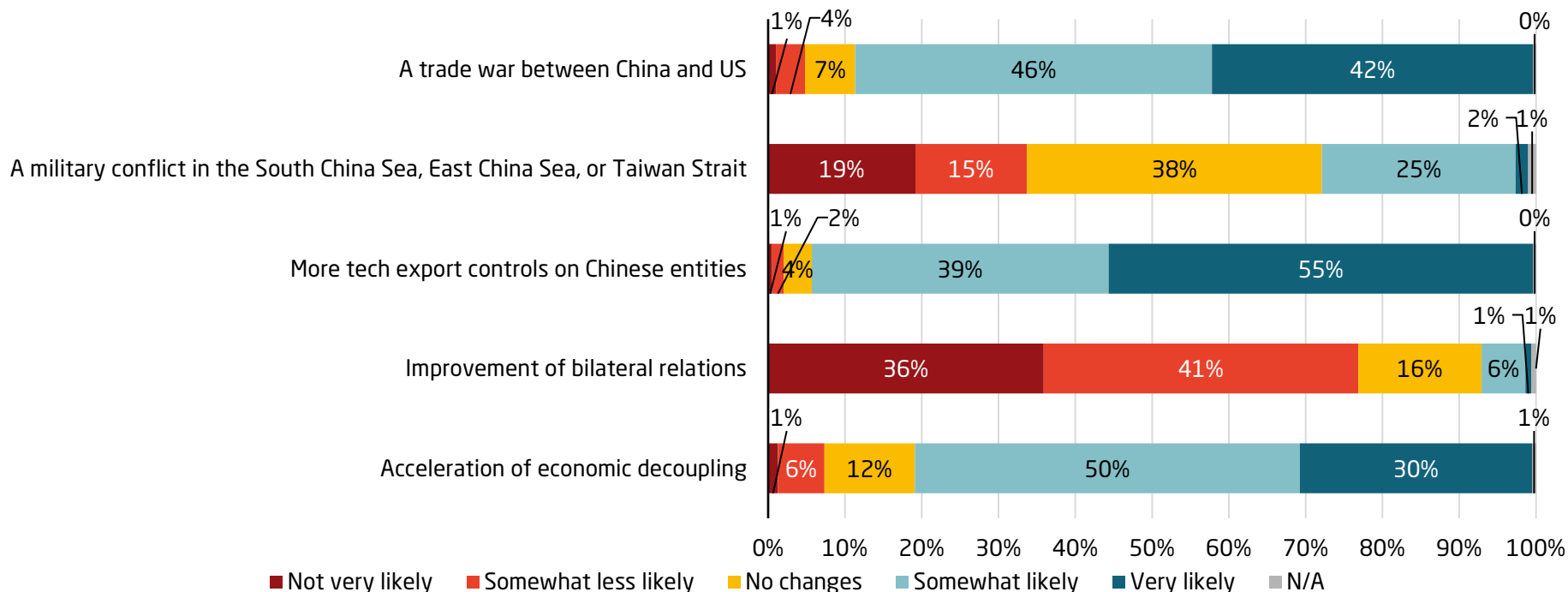


# US-China relations: trade war, export controls, and decoupling



MERICs  
CHINA FORECAST  
2025

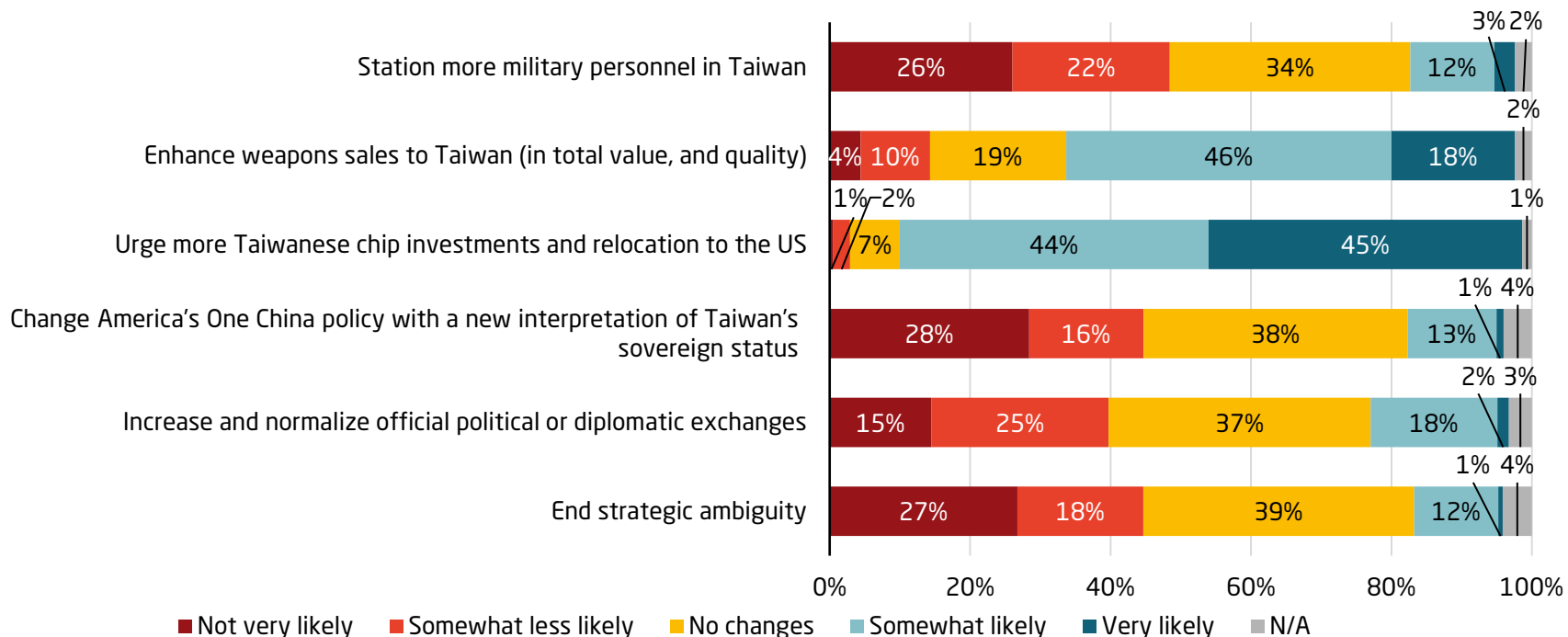
Q16: How do you expect China-US relations to develop in 2025 under the Trump administration?



# US' Taiwan policy: urge Taiwanese chip investments in US



Q17: How do you expect US policy toward Taiwan under the Trump administration to develop in 2025?



# Part 3: About participants of the survey

Number of participants: 843

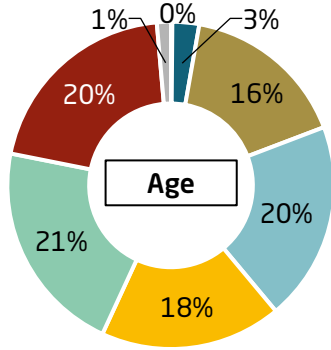
Europe (75%), US (7%), China (4.3%), Rest of the world (12%)

# About participants of the survey

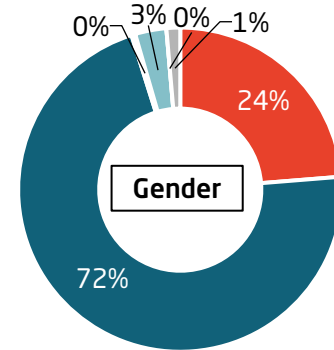
Statistics (age, gender, education, affiliation)



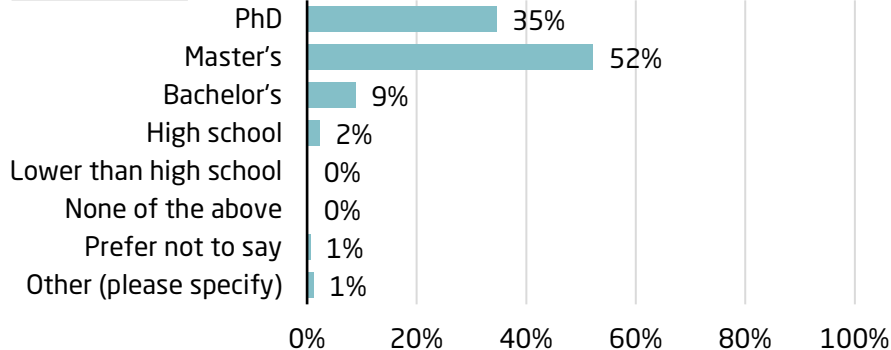
- Under 18
- 18-24
- 25-34
- 35-44
- 45-54
- 55-64
- 65+
- Prefer not to say



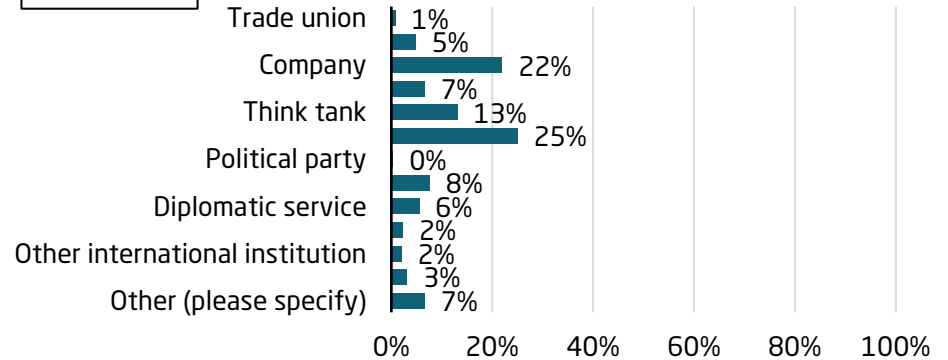
- Female
- Male
- Non-binary
- Prefer not to say
- Other (please specify)
- Prefer not to say



## Education



## Affiliation



## Contact

MERICS | Mercator Institute for China Studies

Alte Jakobstraße 85-86

10179 Berlin

Tel.: +49 30 3440 999 0

Mail: [info@merics.de](mailto:info@merics.de)

[www.merics.org](http://www.merics.org)



Funded by  
the European Union

*The **MERICS China Forecast 2025** is part of the “Dealing with a Resurgent China” (DWARC) project, which has received funding from the European Union’s Horizon Europe research and innovation programme under grant agreement number 101061700.*

*Views and opinions expressed do not necessarily reflect those of the European Union. Neither the European Union nor the granting authority can be held responsible for them.*