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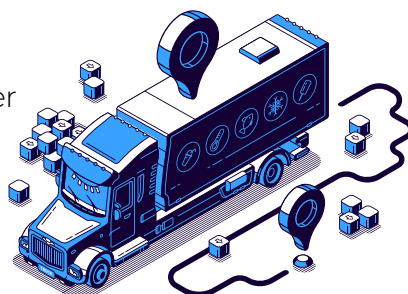
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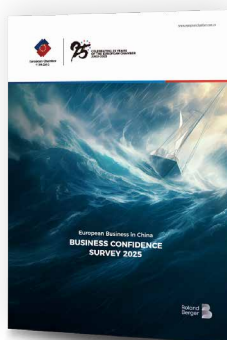


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President's Foreword

Challenging summer tourist economy indicates untapped potential in China's service sector

Although often overshadowed by the relatively short but intense May and October 'Golden Weeks', China's summer travel season is at the core of the country's tourism economy. The volumes at play—such as the record 887 million passenger railway trips in the 2024 season¹—demonstrate the potential that July and August hold for domestic tourism.

However, despite impressive volumes, China's tourism sector struggled in 2024, with reports of tourists cutting back on spending, especially in the high-end segment of the market.² While much of this is likely due to dampened consumer sentiment across the Chinese economy, missed potential in China's service sector because of structural issues is partly to blame.

With just over a 50 per cent share of value added to the economy, China's service sector sits well below countries with a comparable gross domestic product (GDP) per capita.³ In addition to consumer confidence constraints, this is likely due to the relatively restricted nature of the country's service sector, with limited market access and regulatory hurdles creating challenges for both foreign-invested and domestic service providers alike.

Given that the tourism sector—despite remaining relatively closed to foreign investors—is touted as a key driver of the economy amidst efforts to boost consumption,⁴ China would be well placed to use it as a sandbox for further opening in the service sector. For example, a series of pilot schemes that allow foreign-invested travel agencies to operate in select cities still restrict business scope to outbound international travel,⁵ locking foreign investors out of the domestic market.

Fewer restrictions in the tourism services sector would also allow for the creation of more unique and smaller scale experiences, increasingly in demand by younger travellers.⁶ Many of China's tourism ambitions—understandably given the volumes at play—focus on mass tourism.⁷

However, this only exacerbates the concentration of tourists into a few major cities and key destinations.⁸ For the country to achieve its goal of becoming a "world tourism powerhouse" by 2025,⁹ more openness is needed in the sector.

Inbound international tourists represent an underdeveloped market, with China attracting far less foreign tourist spending as a percentage of GDP than major international tourist destinations like Japan and France, despite having the second highest number of United Nations Educational, Scientific and Cultural Organization World Heritage Sites of any country.^{10 & 11}

The high volumes at play in China often mask the extent of potential left on the table, and this is likely the case in both the tourism sector and the service sector as a whole. Further opening, in the form of fewer restrictions on market access, would put the country a step closer to reaching its full potential. **EB**



Jens Eskelund

President

European Union
Chamber of
Commerce in China

¹ Update: China's summer rush ends with record high railway passenger trips. Xinhua, 1st September 2024, viewed 20th June 2025, <<https://english.news.cn/20240901/05131ed2ee474357b9818136b41ca818/c.html>>

² Sun, L. China's travel industry faces reality check of 'worst ever' season. South China Morning Post, 6th October 2024, viewed 20th June 2025, <<https://www.scmp.com/economy/china-economy/article/3281095/chinas-travel-industry-faces-reality-check-worst-ever-season>>

³ Jain-Chandra, S., Kothari, S. and Novta, N. China's Service Sector is an Underutilized Driver of Economic Growth. International Monetary Fund, 2nd August 2024, viewed 20th June 2025, <<https://www.imf.org/en/News/Articles/2024/08/02/cf-chinas-service-sector-is-an-underutilized-driver-of-economic-growth>>

⁴ Summer travel boom in China to propel economic momentum. Xinhua, 7th April 2024, viewed 20th June 2025, <<https://global.chinadaily.com.cn/a/202407/04/WS66866abaa31095c51c50c53a.html>>

⁵ Ministry of Commerce Issues Notice on the Work Plan for Accelerating the Comprehensive Pilot Programme for Expanding the Opening Up of the Service Industry. Ministry of Commerce, 11th April 2025, viewed 28th July 2025, <https://www.gov.cn/zhengce/zhengceku/202504/content_7019915.htm>

⁶ Xinhua Headlines: Chinese youngsters embrace more diversified tourism options. Xinhua, 19th May 2024, viewed 26th June 2025, <<https://english.news.cn/20240519/d13cac2054ec42f2ad486421218d271c.html>>

⁷ China sets out 5-year path for tourism. State Council, 20th January 2022, viewed 26th June 2025, <https://english.www.gov.cn/policies/latestreleases/202201/20/content_WS61e9256dc6d09c94e48a3f62.html>

⁸ Li, N. How China is winning back foreign visitors: China Explained. CGTN, 7th March 2025, viewed 27th June 2025, <<https://news.cgtn.com/news/2025-03-07/How-China-is-winning-back-foreign-visitors-1BvgpJJ2Pm/p.html>>

⁹ Ibid.

¹⁰ Ibid.

¹¹ Top 10 countries with most UNESCO World Heritage Sites in 2025. The Times of India, 16th July 2025, viewed 16th July 2025, <http://timesofindia.indiatimes.com/articleshow/122573872.cms?utm_source=contentofinterest&utm_medium=text&utm_campaign=cpsst>

China's summer economy

European companies can benefit from a resurgent tourism industry

China's travel industry is currently experiencing a resurgence following the COVID-19 years. With evolving travel preferences and expanded visa-free policies, the summer economy promises significant opportunities – especially for European companies operating in or doing business with China. **Ken Zhang** of **Le Tour** explores key travel trends benefiting the sector and the impact of new visa facilitation measures.

Post-pandemic travel trends: Which sectors are thriving?

The COVID-19 pandemic dramatically altered travel behaviour worldwide, but 2025 marks a turning point as Chinese travellers eagerly return to exploring domestic and international destinations. Several segments stand out:

1. Experiential and premium travel

Tourists are increasingly shifting from traditional sightseeing towards more meaningful, immersive



experiences. According to China Travel Online, Chinese outbound travellers in 2025 are prioritising cultural and lifestyle enrichment when choosing destinations.¹ This aligns with the surge in demand for wellness retreats, cultural heritage tours and curated gastronomic journeys.

Premium travel spending reflects this trend: 28 per cent of outbound tourists now budget over Chinese yuan 50,000 for their spending.² European operators—known for their craftsmanship in experience-based tourism—stand to benefit by co-developing high-value itineraries with Chinese partners.

For example, a Chengdu-based luxury travel operator partnered with a German travel company to launch a boutique multi-city route covering Chengdu, Jiuzhaigou and Daocheng Yading. The product blended five-star stays with authentic Tibetan cultural experiences, attracting over 1,200 bookings from European tourists.

2. Family and multi-generational travel

Post-pandemic, many families are prioritising spending quality time together. Summer camps with educational and cultural elements, multi-generational group tours and interactive museum visits are popular. European cultural and educational institutions can expand their presence in China by offering localised summer programmes, language camps and joint heritage projects with Chinese partners.

3. Domestic tourism boom with regional diversification

While top-tier cities remain travel hubs, there is strong growth in less-explored regions like Sichuan, Yunnan and Inner Mongolia. Domestic travellers seek nature, outdoor activities and exposure to different cultures, which opens partnership avenues for European lifestyle, wellness and outdoor brands to enter these niche markets. For example, one Kunming-based outdoor equipment company partnered with a French outdoor brand to create 'green adventure' hiking experiences that emphasised sustainability and local environmental stewardship. The initiative targeted younger eco-conscious travellers and tapped into the growing demand for responsible tourism.

4. MICE and business travel rebound

The Meetings, Incentives, Conferences, and Exhibitions (MICE) sector is back after suffering a serious downturn during COVID-19. With the modern business traveller demanding seamless, integrated travel solutions, European airlines, hotels and event organisers can collaborate with Chinese counterparts to offer streamlined visa support, multi-city travel packages and culturally immersive conference programmes.

One Chengdu venue even partnered with a European airline to offer comprehensive summer MICE packages that included flights,

hotels and venue services, alongside streamlined visa assistance and local cultural immersion options.

Tourist spending

Summer travellers are spending more on premium accommodation, authentic dining experiences, wellness activities, and personalised services such as guided tours and private transfers. Affluent consumers increasingly choose four- or five-star hotels or boutique stays,³ while interest in culinary-led travel has surged.

³ Brooker, A. Boutique hotels win big in China's travel surge, *Jing Daily*, 19th September 2024, viewed 29th August 2025, <<https://jingdaily.com/posts/boutique-hotels-win-big-in-china-s-travel-boom>>



¹ China Outbound Travel Trend Report 2025, China Outbound Travel Resources and News, 30th May 2025, viewed 27th August 2025, <<https://www.chujingyou.org/china-outbound-travel-trend-report-2025/>>

² China Trading Desk Q1 2025 survey reveals 58% of Chinese travellers intend to shop at airport, *DFW Online*, 15th April 2025, viewed 27th August 2025, <<https://www.dfnonline.com/latest-news/china-trading-desk-q1-2025-survey-reveals-58-of-chinese-travellers-intend-to-shop-at-airport-15-04-2025/>>

The wellness sector is also booming, with global wellness tourism worth a massive United States dollar 830 billion in 2023.⁴ While popular experiences include spa visits and yoga retreats, demand for customised travel services has risen in recent years, as travellers increasingly seek deeper, localised experiences.

Meanwhile, digital engagement continues to grow, with virtual tours and contactless payments now baseline expectations – particularly among Gen Z and Millennial travellers.

Visa-free policies: A catalyst for tourism growth

China's recent expansions of visa-free travel and new, simplified visa policies have become a significant catalyst for the summer tourism revival.

Expanded visa-free access

Several provinces, including Sichuan, Hainan and parts of Guangdong, have introduced or broadened visa-free entry schemes for citizens of multiple European

countries.⁵ These policies lower barriers for short-term visits, encourage multi-city travel and make last-minute trips more feasible.

Streamlining group and individual visas

Simplified visa processes, longer validity periods and easier multi-entry permissions enhance traveller convenience, especially for business and leisure visitors



Several provinces, including Sichuan, Hainan and parts of Guangdong, have introduced or broadened visa-free entry schemes for citizens of multiple European countries.



combining trips across China's diverse regions.

Impact on European companies

European travel agencies, airlines and hospitality groups benefit from these policies by marketing easier-access destinations to their clients and developing integrated packages. For example, airlines can promote flexible multi-city ticketing (e.g., fly into Chengdu, depart from Shanghai), while tour operators can highlight visa-free zones to attract independent travellers wary of bureaucratic hurdles.

Boosting inbound and domestic circulation

The visa-free schemes not only facilitate inbound tourism from Europe but also stimulate domestic tourism by enabling seamless regional transit, encouraging visitors to explore beyond first-tier cities.

How European companies can profit from the summer travel season

European companies are well positioned to capitalise on China's booming summer travel season by leveraging their expertise, brand reputation and unique cultural assets. Practical approaches include:

Co-developing tailored luxury and experiential products

Partner with Chinese destination management companies to design high-end, culturally immersive



⁴ The Global Wellness Economy Reaches a New Peak of \$6.3 Trillion—And Is Forecast to Hit \$9 Trillion by 2028. Global Wellness Institute, 5th November 2024, viewed 28th August 2025, <<https://globalwellnessinstitute.org/press-room/press-releases/the-global-wellness-economy-reaches-a-new-peak-of-6-3-trillion-and-is-forecast-to-hit-9-trillion-by-2028/>>

⁵ Regional Visa-Free Entry Policies for Foreign Nationals, National Immigration Administration, 14th February 2025, <<https://en.nia.gov.cn/n147418/n147463/c180637/content.html>>

itineraries that appeal to affluent Chinese travellers, commanding premium pricing.

Expanding educational and cultural exchange programmes

Develop summer camps, workshops, and joint exhibitions that attract family and student groups for educational enrichment during school holidays.

Leveraging digital marketing and e-commerce channels

Utilise China's advanced digital ecosystem of apps such as WeChat, Douyin and Xiaohongshu to market products, leveraging local influencers to build trust and drive bookings.

Entering niche markets through local partnerships

Collaborate with regional operators in less-explored provinces to tap into nature, sustainability and authentic culture-focussed segments, establishing grassroots brand loyalty.

Providing seamless integrated services for MICE and business travel

Bundle flights, accommodation, event access, and visa facilitation for business travellers to improve satisfaction and drive repeat business.

Customising payment and booking systems

Adapt payment methods to include Alipay and WeChat Pay, and integrate with local travel platforms to remove friction and increase conversions during peak season.

Market access barriers

Despite the promising opportunities, some challenges prevent European companies from fully participating in the market:

Regulatory complexity and licensing restrictions

Foreign travel agencies often need to be part of joint ventures and require complex licences. Simplifying licensing or creating special permits would encourage investment and innovation.

Uneven enforcement of visa facilitation policies

Inconsistent application across regions causes uncertainty. Clear nationwide guidelines and communication channels would improve traveller confidence.

Limited access to domestic distribution channels

Chinese online travel agencies sometimes prioritise local partners. Opening platforms or creating international seller windows would enhance fair competition.

Cultural and language barriers

Navigating regulations and consumer preferences is challenging. Supporting capacity-building initiatives, training and incubators would help European firms to localise their operations.

Data privacy and compliance challenges

Complex cybersecurity laws require investments in compliance. Clear guidance and trusted local partnerships can ease this burden.

Recommended government actions

- Streamline and harmonise licensing for foreign operators with transparent, expedited pathways.
- Facilitate platform access and cross-border e-commerce through government-supported matchmaking.
- Promote multilingual information, translation services and cultural orientation workshops.

Seizing opportunities in China's summer economy

Going forward, China's summer economy is likely to offer strong potential for growth fuelled by rising travel demand and supportive policies. European companies that leverage local expertise while taking advantage of the new visa-free travel policies can create unique products, build lasting partnerships and capture this expanding market. Meanwhile, reducing regulatory barriers and improving market access through government initiatives will unlock greater potential for mutually beneficial tourism cooperation. **CE**



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Sichuan Le Tour International Travel Service is a boutique destination management company specialising in luxury foreign independent travel, immersive cultural experiences and premium MICE programs. Operating throughout Sichuan, Chongqing, Yunnan, Tibet, and Guizhou, the company provides seamless logistics and authentic local access for discerning travellers.



The heat is on

Navigating the impact of warmer weather on cold chain warehouses

Warmer weather is not just about a few degrees on the thermostat; it represents a fundamental change that impacts operational efficiency, energy consumption and product integrity. **Nathalie leong** and **Thanh Tran** of **TERAO** explore the multifaceted implications of rising temperatures on cold chain warehouses, with a particular focus on how strategic building design and construction are paramount in securing this indispensable link to the global supply chain.



The hum of refrigeration units is the heartbeat of a cold chain warehouse, diligently preserving everything from life-saving pharmaceuticals to fresh produce and delicate floral goods. However, as global temperatures continue to rise due to climate change, this important sector faces an

unprecedented challenge – one that threatens not only product integrity and regulatory compliance but also profitability and sustainability targets. This warming trend is particularly evident in tropical regions such as Southeast Asia, and increasingly so across China.



The seemingly subtle increase in ambient temperatures has a cascading effect throughout cold chain operations, imposing significant stress on infrastructure and processes.

Perhaps the most immediate and obvious impact of warmer weather is a spike in energy consumption. Refrigeration systems, designed to maintain precise low temperatures, must work significantly harder to counteract higher external heat loads penetrating a building's thermal envelope, meaning that they consume more electricity and cause electricity bills to soar.

This surge in consumption also directly contributes to increased carbon emissions, posing a significant challenge to corporate sustainability goals and Scope 2 reporting requirements. Studies have shown that energy consumption in cold stores can increase by up to 30 per cent, depending on operating conditions,¹ with cooling systems alone accounting for a substantial portion (around 44.1 per cent) of a factory's total electrical energy consumption.²

This added burden not only inflates operating costs but also accelerates wear and tear on important equipment, demanding more frequent maintenance and raising the risk of costly downtime.

Compromised product integrity and increased spoilage

The primary purpose of a cold chain is to maintain the quality and safety of temperature-sensitive products. Even minor temperature fluctuations can have devastating consequences. For perishable foods, just a few

degrees above the ideal range can accelerate spoilage, lead to bacterial growth, reduce shelf life by days or even weeks, and render products unsafe to consume.

In the pharmaceutical sector, temperature changes can reduce the effectiveness of vaccines and medications, posing serious public health risks. The United Nations Food and Agriculture Organization estimates that approximately 14 per cent of food spoils before it ever reaches retailers, causing losses of up to United States dollar 400 billion annually³ – a figure exacerbated by inadequate temperature control in warmer conditions.

Pressure on infrastructure and equipment longevity

Older refrigeration systems struggle to cope with sustained higher temperatures, leading to inefficiencies and an increased risk of failure. Indeed, refrigeration systems are designed to operate within specific ambient temperature ranges to ensure optimal performance and refrigerant capacity. When external temperatures exceed these maximum operating conditions, the cooling effect can be severely diminished or even cease to function entirely, leading to system failure and compromised cold rooms. The added stress on compressors and other components can significantly reduce their lifespan. Importantly, warmer ambient temperatures will directly impact the integrity and performance of warehouse buildings. Poorly insulated walls and roofs, especially large flat surfaces commonly found in warehouses, absorb and radiate more heat, making it even harder to maintain internal cold.

Problems such as thermal bridges (heat conduction through less insulated structural elements) become more pronounced, creating potential pathways for heat absorption. Damaged or ill-fitting cold storage doors can also become major culprits, allowing precious cold air to escape and warm air to enter, putting an extra strain on the cooling system. Therefore, a well-designed building is the first line of defence against external heat.

Challenges in transportation and last-mile delivery

The impact of warmer weather extends beyond warehouse walls. Transporting temperature-sensitive goods becomes more challenging. It is now more difficult for refrigerated trucks and containers to maintain consistent temperatures, especially during loading and unloading operations during which products are exposed to ambient heat. Complex last-mile deliveries, particularly in dense urban areas or remote regions, are also at higher risk of temperature variations as vehicles navigate traffic or extended routes.

Expert solutions: Adapting cold chain warehouses to a warming world

The good news is that the industry is not standing still. A proactive and strategic approach, leveraging both established best practices and cutting-edge technologies, is essential for mitigating the impact of warmer weather.

¹ *Manufacturing: Introducing energy saving opportunities for business*, Carbontrust, 2018, viewed 15th August 2024, <<https://www.carbontrust.com/resources/manufacturing-sector-guide>>

² Carrasco, J. C., Pascual-Guillamón, M. and Salas-Vicente, F. 2021, *Improve the Energy Efficiency of the Cooling System by Slide Regulating the Capacity of Refrigerator Compressors*, Applied Sciences, volume 11, issue 5, viewed 15th August 2025, MDPI host database, <<https://www.mdpi.com/2076-3417/11/5/2019>>

Enhancing insulation and building design

Keeping the heat outside is just as important as keeping the cold inside; this starts with the physical structure of a warehouse and its thermal envelope. It also involves a multi-pronged approach to insulation and building design:

- **Underground storage**

Keeping products cool underground could be considered, as the temperature of the earth is relatively more stable than the temperature of the air. Excavation costs and humidity control costs would need to be considered before choosing this solution.^{3&4}

- **High-performance insulation**

Adding or upgrading advanced insulation materials with higher R-values (thermal resistance) in walls, roofs and floors is fundamental.

- **Airtight construction**

Minimising uncontrolled air leakage is important. This means paying attention to detail during construction, using air barriers and sealing all gaps and joints to prevent warm, moist air from entering, causing not only heat but also frost and condensation.

- **Cool roof technologies**

Applying highly reflective 'cool roof' coatings or materials for a roof's surface can significantly reduce solar heat gain. These coatings effectively bounce sunlight away from the building rather than absorbing it, directly reducing the load on the cooling systems below.

- **Airtight, fast-closing doors**

In frequently accessed areas, installing high-speed, insulated doors minimises the exchange of air, preventing hot air infiltration

and cold air loss. Polyvinyl chloride strip curtains can also be effectively used during loading operations.

- **Optimising ventilation and passive design**

While it may seem counterintuitive for cold spaces, intelligent ventilation systems, including high-volume, low-speed (HVLS) fans, can promote even air circulation and prevent hot air pockets in warehouses, improving overall thermal stability. Where feasible, incorporating passive design principles such as strategic building orientation to minimise sun exposure can further reduce heat gain.

Investing in energy-efficient and smart refrigeration systems

Upgrading to high-performance, energy-efficient refrigeration systems is paramount. Modern solutions offer precise temperature controls, lower operational costs and enhanced reliability. This includes technologies such as variable-speed compressors, which can adjust capacity to match the cooling load, and smart HVAC systems that utilise real-time data to optimise performance. These solutions are not merely about operational savings; they represent strategic investments with clear returns on investment through reduced energy expenditure and enhanced asset longevity. For example, research shows that retrofitting inefficient conventional refrigeration plants can lead to energy savings of up to 50 per cent.⁵

Technologies for a warming climate

Advances in refrigeration technology must be a key area of ongoing research

and development for the cold chain. Innovations that focus on creating lower Global Warming Potential (GWP) alternatives that maintain efficiency and cooling capacity even during higher ambient temperatures can help to ensure system reliability in a warming climate.

Implementing advanced temperature monitoring and control

Real-time, continuous temperature monitoring is no longer a luxury but a necessity. Modern systems leverage internet-of-things sensors and artificial-intelligence-driven analytics to provide precise data across all zones of a warehouse. These systems can issue immediate warnings when there are any deviations from set thresholds, allowing proactive intervention before damage occurs. Integrating this data with warehouse management systems enables dynamic inventory control and optimised operations. Blockchain technology can further enhance transparency by creating an immutable temperature history record.

Prioritising preventative maintenance

A robust preventative maintenance programme is important to ensure refrigeration systems operate at peak performance, especially during periods of high demand. Regular cleaning and inspection of evaporators and condensers, checking refrigerant levels, testing sensors and electrical components, and scheduling routine maintenance

³ The State of Food and Agriculture, Food and Agriculture Organization of the United Nations, 2019, viewed 15th August 2015, <<https://openknowledge.fao.org/server/api/core/bitstreams/1192881-dc78-4171-8d02-92235b8d7dc7/content>>

⁴ For more information, see: Sustainable Cold Storage Logistics: How Underground Facilities Reduce Environmental Impact, Smart Warehousing, 28th October 2025, viewed 14th August 2025, <<https://www.smartwarehousing.com/blog/sustainable-cold-storage-logistics-how-underground-facilities-reduce-environmental-impact>>

⁵ Karacan, M.A., Yilmaz, I.C., and Yilmaz, D., 2023, Key implications on food storage in cold chain by energy management perspectives, Frontiers in Sustainable Food Systems, vol. 7, viewed 15th August 2025, <<https://www.frontiersin.org/journals/sustainable-food-systems/articles/10.3389/fsufs.2023.1250646/full>>

Examples of lower GWP refrigerants

| Refrigerant Name(s) | GWP | Typical Applications | Outside Operating Temperature Range |
|--|-------------|---|---|
| R-1234ze(E) | <1 | Chillers, heat pumps, medium-temperature refrigeration. | Suitable for high ambient (up to 45–50 °C). |
| R-1234yf | <1 | Mobile air conditioners, smaller chillers, some refrigeration blends. | Suitable for high ambient (up to 45–50 °C). |
| R-1233zd(E) | <1 | Chillers, large heat pumps, industrial process cooling. | Excellent for high ambient. |
| R-1336mzz(Z) | 2 | High-temperature heat pumps, process chillers. | Excellent for high ambient. |
| R-454C (Opteon™ XL20) | 148 | Commercial refrigeration (supermarkets), cold storage. | Good for high ambient (up to 40–45 °C). |
| R-448A / R-449A | 1273 / 1397 | Commercial refrigeration, retrofits for R-404A/R-22. | Wide operating range, including high ambient. |
| R-513A (Opteon™ XP10) | 573 | Chillers, medium-temperature commercial refrigeration. | Wide operating range, including high ambient. |
| Carbon Dioxide (CO ₂ / R-744) | 1 | Supermarkets (trans-critical systems), industrial refrigeration. | Functions in high ambient via trans-critical systems (above 31 °C). |
| Ammonia (NH ₃ / R-717) | 0 | Large industrial cold storage, food processing plants. | Very wide operating range, excellent in high ambient. |
| Propane (R-290) | 3 | Small commercial units, chillers (with charge limits). | Wide operating range, good in high ambient. |

before peak heat hits can prevent costly breakdowns and extend equipment life. For instance, actively managing defrost frequency and duration can reduce annual system energy use by approximately three per cent.⁶

Strategic planning and route optimisation


Effective logistics planning can mitigate heat exposure during transportation. This includes selecting the most efficient routes, avoiding areas of high temperatures, and timing shipments to bypass the hottest parts of the day or season. Advanced logistics software that integrates real-time weather data and traffic patterns can be invaluable in mapping optimal routes. Furthermore, pre-cooling fresh produce immediately after harvest can significantly slow spoilage, extending its shelf life.

The future of cold chain: Resilience and sustainability

The increasing frequency and intensity of warmer weather events underscore

the urgent need for a more resilient and sustainable cold chain. Furthermore, to navigate the evolving landscape of regulatory compliance—particularly for pharmaceuticals and food safety, which necessitates advanced temperature control measures—the industry must embrace a forward-looking perspective. This includes exploring alternative energy sources such as solar photovoltaic systems to power cold storage facilities, adopting more environmentally friendly refrigerants, and funding research and development of new cooling technologies.

For true long-term sustainability, the focus must firmly extend to core building structures. Future cold chain warehouses will increasingly adopt green building certifications such as LEED, BREEAM or EDGE, demonstrating a commitment to environmental performance from the ground up. Integrating advanced building management systems with cooling controls will create truly smart buildings, optimising energy use based on external conditions and internal demands.

The impact of warmer weather on cold chain warehouses is undeniable and profound. It presents a complex web of challenges, from soaring energy costs and elevated operational disruptions to the rapid degradation of important infrastructure. However, by adopting advanced technologies, optimising operational practices and prioritising strategic planning, the cold chain industry can adapt and thrive in this changing climate. 

Nathalie leong is senior expertise manager at **TERAO**. **Thanh Tran** is the company's marketing manager.

TERAO is a French building sustainability consultancy, with 30 years of pioneering experience. Since 2008, TERAQ has expanded its presence into Asia, with primary hubs in China, Vietnam, Thailand, Singapore, Malaysia and the Middle East. The firm plans further expansion into the rest of Southeast Asia, India, and other global locations. Specialising in reducing the environmental impact of buildings, TERAQ offers expertise for both new constructions and existing assets across diverse sectors and building types, including hospitality, manufacturing, retail, healthcare and more.

⁶ Fiscal Year 2020: Annual Performance Report, United States Environmental Protection Agency, January 2021, viewed 15th August 2025, <<https://www.epa.gov/sites/default/files/2021-01/documents/epa-fy-2020-annual-performance-report.pdf>>

9TH MAY
TIANJIN

A European Chamber delegation meets with the Tianjin Municipal People's Government
Photo: European Chamber

Tianjin Chapter meets with Municipal Government



On 9th May, European Chamber President Jens Eskelund chaired a closed-door meeting with the Tianjin Municipal Government. The meeting was also attended by Chamber Secretary General Adam Dunnett and the board of the Tianjin Chapter, as well as by Tianjin's Vice Mayor Zhai Lixin, Deputy

Secretary General Yang Liu and representatives from seven municipal bureaus.

Eskelund emphasised the strategic role Tianjin plays in many members' global supply chains. Tianjin Chapter Chair Mirko Turrina then introduced the chapter and communicated members' recent experiences of utilising various supportive policies, as well as challenges members are facing due to the United States-China trade war, shortages of skilled labour, and the frequency of environmental, health and safety inspections. Zhai thanked the Chamber for its input and for facilitating smooth communication between the government and member companies.

15TH MAY
SHANGHAI

Vice President and Shanghai Chapter Chair Carlo D'Andrea speaking at the roundtable
Photo: European Chamber

Exclusive roundtable with secretary general of Shanghai Municipal Committee



On 15th May, the European Chamber held an exclusive roundtable with Hua Yuan, member of the Communist Party of China Shanghai Standing Committee and secretary general of the Shanghai

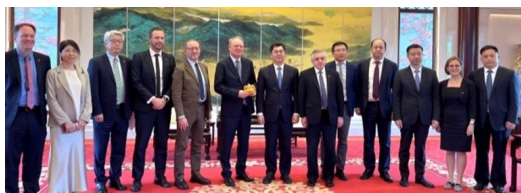
Municipal Committee. The meeting was attended by Carlo D'Andrea, European Chamber vice president and chair of its Shanghai Chapter, Steven Basart, general manager of the Shanghai Chapter, and a delegation of Advisory Council members.

D'Andrea emphasised the need for measures to increase small and medium-sized enterprises' access to financing, strengthen intellectual property rights protection, and facilitate international cooperation in sports.

20TH MAY
SOUTH CHINA

A European Chamber delegation meeting with Guangzhou Mayor Sun Zhiyang
Photo: European Chamber

European Chamber delegation meets Guangzhou Mayor Sun Zhiyang



On 20th May, a European Chamber delegation led by President Jens Eskelund met with Guangzhou Mayor Sun Zhiyang. During the meeting, then Chamber Vice

President Klaus Zenkel and South China Chapter Chair Fabian Blake highlighted challenges faced by the chapter's members, including insufficient green energy access, unclear cross-border data transfer regulations, and issues receiving payments under the region's Greater Bay Area Individual Income Tax scheme.

Sun thanked the European Chamber for acting as a bridge between government and industry, and for outlining the challenges faced by member companies operating in the region.

21ST MAY
SHENYANG

Chamber President Jens Eskelund, Shenyang Chapter Chair Erich Kaiserseder, and Secretary General Adam Dunnett with Shenyang Mayor Lyu Zhicheng and Vice Mayor Zhao Wei
 Photo: European Chamber

European Chamber meets Shenyang Mayor Lyu Zhicheng



On 21st May, European Chamber President Jens Eskelund led a delegation of representatives from the Chamber's Shenyang Chapter to meet with Shenyang Municipal

Government representatives, including Mayor Lyu Zhicheng, Vice Mayor Zhao Wei and senior officials from several key municipal departments. Eskelund said that domestic supply and demand in China will need to be better balanced, and China will need to foster the development of a more predictable business environment if the country is to restore its status as a leading destination for foreign direct investment. Lyu thanked the Chamber for the exchange and called for strengthened institutional dialogue between foreign-invested enterprises and the Shenyang Government.

27TH MAY
BEIJING

Roundtable for Sino-European Semiconductor Enterprises
 Photo: European Chamber

European Chamber attends semiconductor roundtable



On 27th May, a roundtable for Sino-European semiconductor enterprises, operating in both upstream and downstream segments of the industry, took place in Beijing. The event was jointly organised

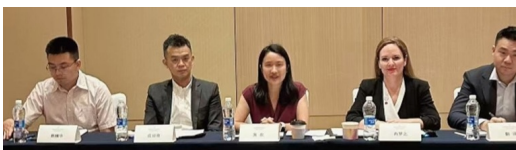
by the Bureau of Industry, Security, Import and Export Control of the Ministry of Commerce, the European Chamber, and the China Semiconductor Industry Association (CSIA).

Jiang Qianliang, director general of the Bureau of Industry, Security, Import and Export Control, Stefan Bernhart, vice president of the European Chamber, and Wang Junjie, executive secretary general of the CSIA, all spoke at the event, during which Chinese officials provided guidance on China's current rare earth export control policies. Chamber member companies raised questions and gave details on how the measures were impacting their supply chains.

10TH JUNE
SOUTHWEST
CHINA

A closed-door meeting between the Southwest China Chapter and the Chongqing Committee of China Council for the Promotion of International Trade (CCPIT)
 Photo: European Chamber

Southwest China Chapter meets president of CCPIT Chongqing



On 10th June, a European Chamber delegation chaired by Vice President and Southwest China Chapter Chair Raquel Ramirez, met with Deng Lin, president of the

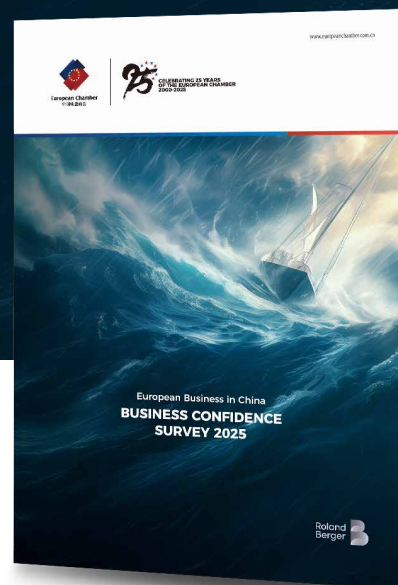
Chongqing department of the Committee of China Council for the Promotion of International Trade (CCPIT), and Zhang Haiqing, vice president of CCPIT Chongqing. Ramirez noted that while Chongqing ranked as the most open region in terms of market access, Chamber members reported a need for improved policy transparency, enhanced cross-department coordination and increased access to green energy in the Chamber's recent *Business Confidence Survey*.

BUSINESS CONFIDENCE SURVEY 2025

Increased difficulty
doing business and
subdued expectations:
the new normal?

After China ended its zero-COVID policy in late 2022, Chinese officials began issuing a series of policy plans geared towards restoring business confidence and strengthening the foundations of the Chinese economy. However, as the *Business Confidence Survey 2025* indicates, this has not yet resulted in an uptick in business confidence; rather, the picture has deteriorated across many key metrics.

A record percentage of respondents (73%, +5 percentage points (pp) year-on-year (y-o-y)) reported that doing business in China became more difficult in 2024, while bottom lines continued to underwhelm. Optimism about near-term future growth and profitability in China reached record low levels, clocking in at 29% and 12% respectively; and the importance of China for European businesses' global profits diminished, with seven in 10 respondents reporting earnings before interest and taxes margins in China less than or equal to their worldwide average.

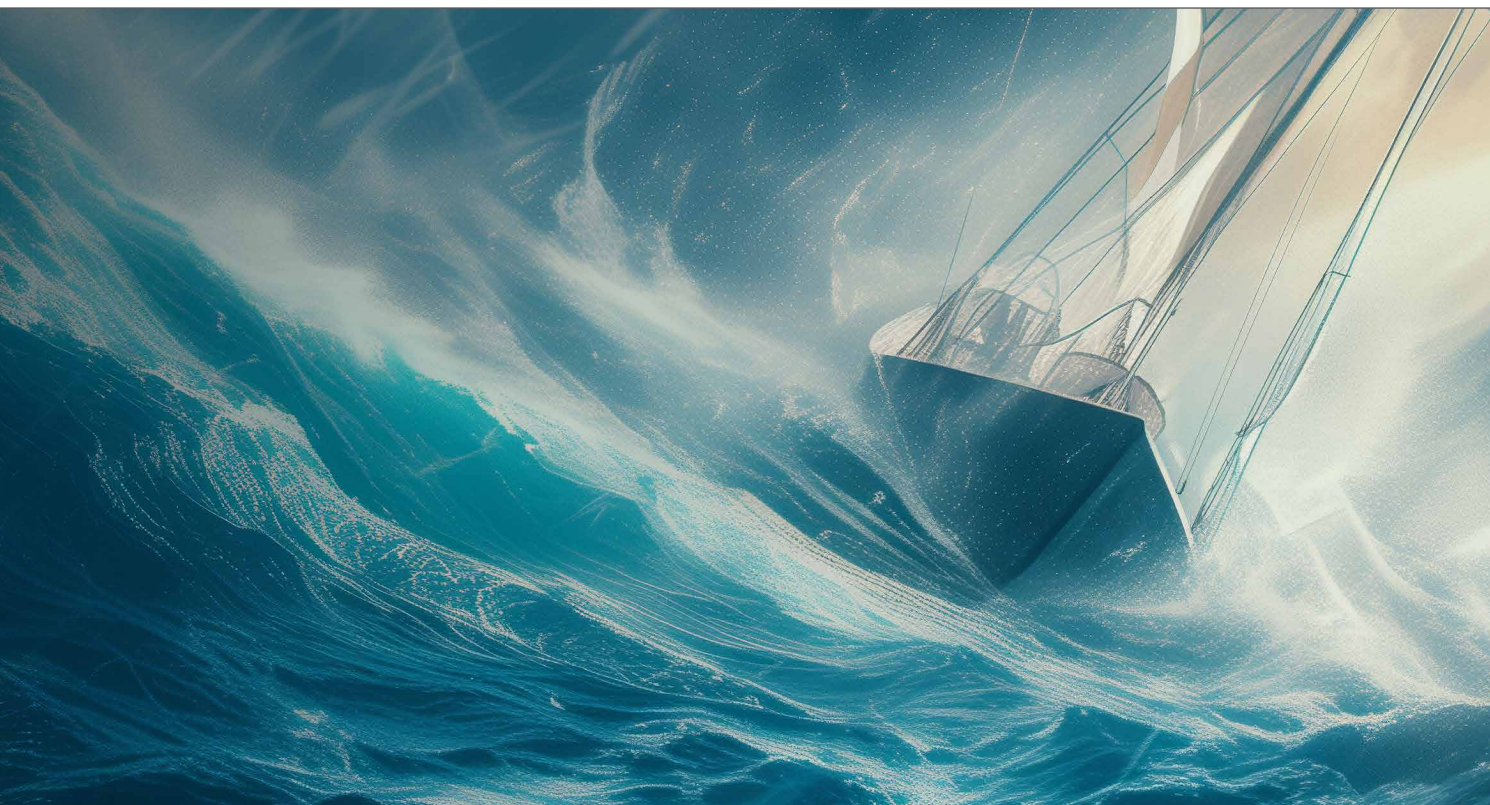


The European Chamber's Business Confidence Survey 2025 is available to download free from the Chamber's website. Please visit:

<https://www.europeanchamber.com.cn/en/publications-business-confidence-survey>

Or scan the QR code:





73%

A record percentage of respondents reported that doing business in China became more difficult in 2024.

63%

Market access and regulatory barriers remain widespread, with a record number having missed business opportunities in 2024.

52%

A majority reported that the business environment in China became more politicised in 2024.

European sentiment may not have bottomed out yet

Market access and regulatory barriers remain widespread, with a record high (63%, +5pp y-o-y) having missed business opportunities in 2024. Progress was made on some issues, including the ease with which companies are able to transfer data cross-border. However, over the next five years: 44% expect the number of regulatory obstacles faced to increase (-3pp y-o-y). In addition, 44% do not expect a level playing field between foreign and domestic enterprises in their industry (+1pp y-o-y); and a third

do not expect to see meaningful market opening (33%, +2pp y-o-y).

The picture is further complicated by the fact that politics continues to impact business. A majority (52%) reported that the business environment in China became more politicised in 2024. A significant number of European Chamber members came under increased pressure from Chinese, European and third-country governments, as well as customers. With United States (US)-China and European Union (EU)-China trade tensions escalating, and different legal regimes increasingly coming into conflict, sentiment is widespread that

business will become more politicised throughout the coming year.

Despite China's leadership in green technology and the country's massive growth in installed green electricity generation capacity, European companies also continue to face issues when it comes to decarbonising their China operations, a central consideration when evaluating if and where to make fresh investments. Confronted by challenges to achieving carbon neutrality, some Chamber members have diluted or even postponed related targets: the proportion of respondents reporting that they are not trying to achieve carbon neutrality in China increased 5pp y-o-y.

Investment and operational strategies are being adjusted accordingly

Because of these developments, fewer are planning to grow their footprint in China. A record low percentage of respondents plan to expand operations in the country over the coming year (38%, -4pp y-o-y); and the proportion of those cutting costs—which for many entails headcount reduction—is equal to last year's historic high of 52%.

China's standing as an investment destination remains below potential with nearly one in five reporting that the country is not even a top-10 destination for current investments (19%, no pp change y-o-y). On top of this, the overall value of reinvestment is falling, with 37% (+2pp y-o-y) planning on doing so at a level lower than their historical average.

Meanwhile, European companies are continuing to silo their China operations in response to the more uncertain global environment while also pivoting to other markets that are more alluring. There has been an increase in the proportion of Chamber members that have already moved both current (17%, +4pp y-o-y) and future investments (16%, +4pp y-o-y) from the country, with Europe overtaking the Association of Southeast Asian Nations as the main beneficiary of these investment shifts.

Many companies are continuing to adjust their supply chain strategies as well. There has been an increase in the proportion of those onshoring into the Chinese mainland (26%, +5pp y-o-y); and half this figure (13%) are offshoring, or in the process of establishing alternative supply chains outside of the country, for commercial reasons, as well as to build resilience and hedge against potential future shocks.



This 'decoupling' that is taking place between company headquarters and China entities is leading to a slowdown in overall operations and difficulties capitalising on new investment plans, precipitating a negative cycle of disengagement.



These trends may come at a cost, both to business and to China

A majority of Chamber members report reviewing their supply chain strategies to strengthen supply chain resilience and/or for cost-related reasons. Some companies have taken the decision to separate certain China-based functions, or even entire operations, from the rest of the world for non-commercial reasons, such as to comply with regulatory or localisation requirements. This increases overall costs and global compliance risks, while resulting in inefficiencies, reduced innovation capacity and a loss of international competitiveness. This 'decoupling' that is taking place between company headquarters and China entities is leading to a slowdown in overall operations and difficulties capitalising on new investment plans,

precipitating a negative cycle of disengagement.

For China, these developments are opening the door wider for other markets to court foreign investment at its expense.

Nevertheless, the Chinese authorities have many ways to address this. Full implementation of recent measures aimed at optimising the business environment would help prevent a further deterioration of foreign investor confidence and provide a strong foundation to build upon. The majority of Chamber members are ready to commit more if China implements reforms to further open its market: 53% would increase their investments if granted greater access. Other factors that would incentivise European companies to increase their investment are the creation of a more transparent regulatory environment, making business less politicised and providing equal access to procurement opportunities.

It is therefore positive that tackling the main challenges facing China's economy has now been placed front and centre of the country's policy discourse, including at the 2025 Two Sessions. It is also encouraging that recent policy announcements aimed at improving the environment for foreign investment have emphasised the need to follow through on implementation.

The European Chamber believes that its members can play a key supporting role in this process. Deeper cooperation between the Chinese authorities and the European business community can result in effective, actionable plans to reverse the deterioration of China's business environment before it becomes the new normal. 

Robbie Jarvis is a senior policy and communications manager at the **European Chamber** and was the lead author of this year's *Business Confidence Survey*.

China ShortCuts

The European Chamber launched its new, short-format podcast series in October 2022.

China ShortCuts is a five-minute weekly catch-up about the Chinese business landscape.

Tune in to stay informed on the latest economic data, market trends, and policy and regulatory updates that could shape your industry.



HELLO



50

minutes

Hey!

China ShortCuts is available on Apple Podcasts, Spotify and Google Podcasts, or you can subscribe to the RSS feed:



Follow our official WeChat account 'european-chamber' to be notified about new episodes. Visit our podcast website for more information.



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Podcast

#BECAUSE OFUS

Promoting fair competition in China's urban rail market

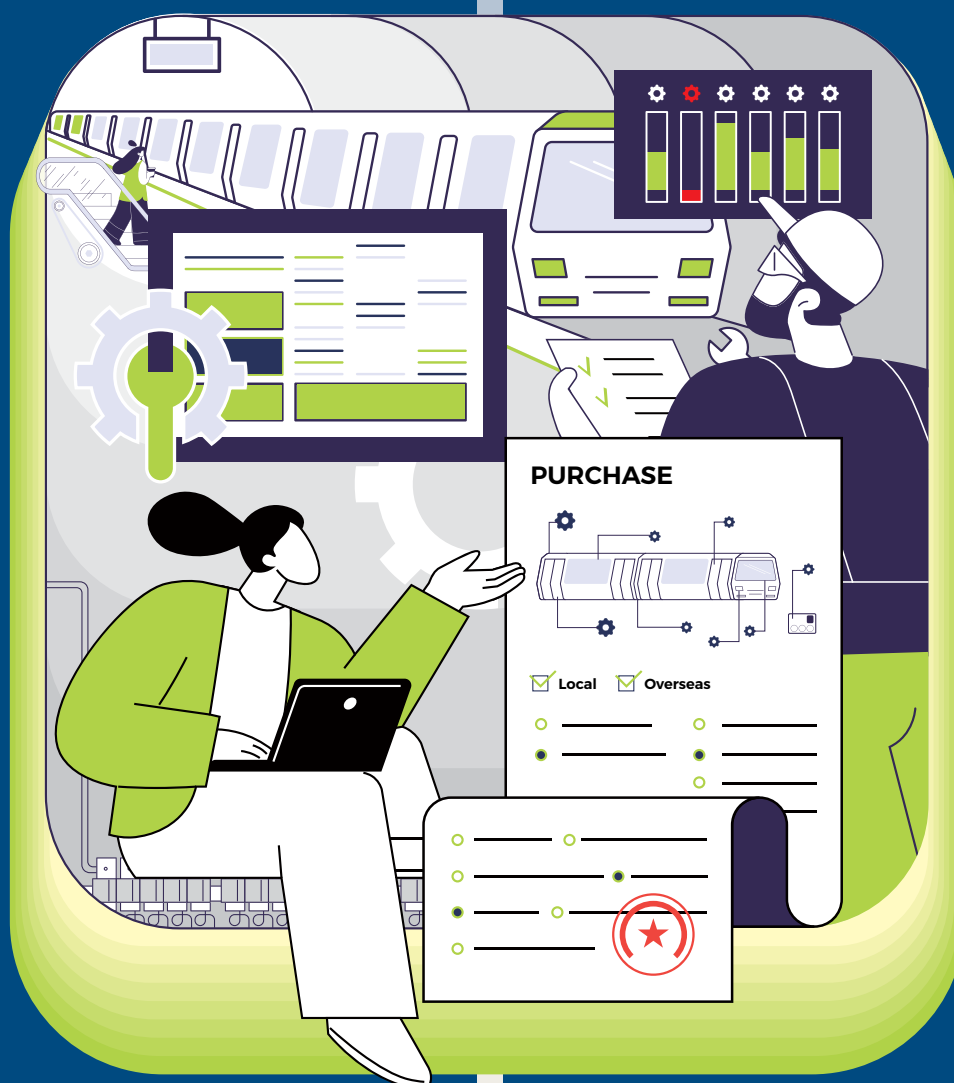
As the independent voice of European business in China since 2000, the European Chamber actively participates in China's legislative process and our advocacy activities are widely recognised by the Chinese authorities.

We launched our #becauseofus campaign in 2019 to show our gratitude for the joint advocacy efforts of all stakeholders: governments, think tanks, member companies and our own working group and desk managers. In *EURObiz* in 2025, we will present some examples of our successful advocacy work.

In this edition, we look at **efforts to promote fair competition in China's urban rail market.**

According to the European Chamber's *Business Confidence Survey 2025*, 47 per cent of European respondents from the transport and logistics sectors reported losing business due to market access restrictions and regulatory hurdles.


In the **rail sector**, foreign-invested enterprises in China have long faced unequal treatment, particularly in **urban rail projects**. A key barrier was the 2014 version of the **Tender Evaluation Method for Urban Rail Transit Vehicles (Tender Evaluation Method)**, issued by the China Association of Metros. This method embedded discriminatory scoring against wholly foreign-owned enterprises and foreign-



controlled joint ventures. As many local urban rail projects adopted this template in the bidding process, it could determine the outcome of a bid, prompting Chinese original equipment manufacturers to avoid foreign component suppliers entirely.

Since 2020, the European Chamber's **Rail Working Group** has tirelessly advocated for a fairer evaluation system. Through annual *Position Papers*, targeted advocacy letters and direct engagement with key authorities—including the State Council, the National Development and Reform Commission, the Ministry of Commerce, and their local counterparts—the working group persistently highlighted the issue. At the same time, the Chamber kept European stakeholders closely informed, ensuring a coordinated approach to advocacy.

As a result, a revised version of the *Tender Evaluation Method* was released in December 2024, removing the discriminatory scoring system. This change marks a significant step toward eliminating de facto discrimination and restoring a level playing field for foreign companies in China's urban rail market, improving the investment confidence of foreign participants in the rail transportation sector.

The European Chamber will continue to monitor how new policies are implemented and highlight any discriminatory treatment to the authorities. Furthermore, in addition to the urban rail market, the Chamber will continue to advocate for a level playing field between Chinese and foreign players in other rail markets, including long-distance rail transport and locomotive products. 

Food regulation in China

From ingredients to finished foods

China has established a comprehensive system to regulate food – from the use of food ingredients and additives, food claims and labelling, to manufacturing processes, facility registration and import/export requirements. **Jenny Xin Li** and **David J. Ettinger** from **Keller and Heckman LLP** explain how ingredients, including food additives, receive approval to be used in finished food products.

The Chinese Government has a comprehensive framework for regulating food sold to consumers. In recent years officials have been proactive in amending existing regulations and developing new requirements to keep up with industry innovation and consumer demands. Foreign food companies often find it challenging to navigate the local regulatory landscape when entering the Chinese market. Since pre-market food approval is one of the common challenges companies must tackle, this article uncovers various types of food applications (e.g., novel food) in China to help companies gain a better understanding.

New food ingredients

Food ingredients are the basic substances used in food, such as sugar, starch and water. China does not have a 'positive list' of food ingredients. However, pre-market approval is required if a food ingredient is a 'new' ingredient in accordance with the National Health Commission's (NHC's) novel food regulations.¹ Typically, 'new' here means a substance that has



¹ Administrative measures for the safety review of new food raw materials, National Health Commission, 26th December 2017, viewed 13th August 2025, <<https://www.nhc.gov.cn/wjw/c100221/202201/0bba384f540430485b886edba385559.shtml>>

² Updates, National Health Commission, 2nd July 2025, viewed 13th August 2025, <https://www.nhc.gov.cn/sps/c100087/new_list.shtml>

not been traditionally consumed in China. That means if an ingredient is commonly used in Europe, it may still be considered new in China if it lacks a history of consumption. One can seek approval for a new food ingredient via the so-called ‘novel food application’ process. The subjects of novel foods could be, for example, newly developed plant extracts, edible bacterial strains, cultured meat, insect-based ingredients or fermentation-derived proteins. The NHC will review each application and make an announcement on its website once approved.²

New food additives

Food additives in China are regulated by the national food additive standard *GB2760*.³ Only permitted food additives can be used in food. That means non-permitted additives, i.e., ‘new’ food additives, must obtain pre-market approval before their use in China. The NHC is also the food agency in charge of reviewing and approving new additives in accordance with the food additive regulations.⁴ It has set out the specific data requirements for new food

additives. The subjects of food additives not only include the typical ones such as preservatives, colour additives and antioxidants, but also nutritional fortification substances (e.g., vitamins and minerals), enzymes, chewing gum base ingredients and processing aids (e.g., solvents and filtration agents). Thus, one should first assess whether a substance used in food is considered a food additive or food ingredient in China before applying for approval as they are subject to different application procedures.

Finished foods for consumers

The substances used in food may be subject to pre-market approval, and the finished foods sold directly to consumers may also require pre-market approval in China. Health foods are one such example. When a company intends to communicate certain health benefits of a food to consumers through product labelling, such food would be deemed a ‘health food’ that can only be marketed in China after receiving approval from the State Administration of Market

Regulation (SAMR). For instance, making the claim that a food has the function of boosting the body’s immune system would transform the product into a health food, meaning it would require pre-market approval. It should be noted that in practice only the health claims approved by Chinese regulators can be used for health foods sold in the country. Therefore, even if one can demonstrate the scientific relationship between the food and the stated health claim, and has already obtained approval from other regulators, such as the European Food Safety Agency, it needs to go through the SAMR’s health food application process⁵ by submitting the required data. Notably, the SAMR’s approval is product-specific and company-specific.

Other than health foods, there are other special foods⁶ in China that require pre-approval by the SAMR before being placed on the market, such as the formulation of infant formula products and foods for special medical purposes, for which there are detailed requirements. Therefore, one should always assess the regulatory status of a food in its entirety (e.g. food composition and labelling) when considering its export to China.

As 2025 marks the fiftieth anniversary of diplomatic relations between the European Union and China, food could be a sector for further cooperation as China continues to optimise its food regulatory environment, providing European companies with a more transparent, rules-based gateway to a market of 1.4 billion consumers. **EB**

David J. Ettinger is a partner at **Keller and Heckman LLP**. **Jenny Xin Li** is a counsel at the firm.

Keller and Heckman LLP is an international law firm that provides food regulatory compliance services to companies and industry associations around the world, e.g., food import/export requirements, product approvals and food labelling/advertising etc.



² Latest Announcements, National Center for Food Safety Risk Assessment, 16th March 2025, viewed 13th August 2025, <<https://sppt.cfsa.net.cn:8086/db?type=2&guid=6CA1489A-9570-4906-8CE8-CC86F8FB1941>>

⁴ Regulations on the Application and Acceptance of New Food Additive Varieties, National Health Commission, 25th May 2010, viewed 13th August 2025, <https://zwfw.nhc.gov.cn/kzx/zcfx/spjlxqzsp_236/201005/20100525_1311.html>

⁵ Health Food Registration, State Administration for Market Regulation, viewed 13th August 2025, <<https://zwfw.samr.gov.cn/guideDetail?id=22d18e7b4dc749fa9d1a52d172c2b3f8>>

⁶ Article 74 of the Chinese Food Safety Law refers to special foods. See: Food Safety Law, State Administration for Market Regulation, 29th April 2021, viewed 13th August 2025, <https://www.samr.gov.cn/zw/zfxgk/fdzdgknrt/fgs/art/2023/art_60f4e1672914971a72949e1fc88eb05.html>

The future of talent in China

How European companies can navigate a changing labour market

In this article, **Roland Brouwer**, regional director for Europe and international relations at **BIPO**, explores the evolving dynamics of China's labour market and the implications for European businesses. Once primarily viewed as a source of low-cost labour, China has undergone a significant transformation. Today, it is home to an increasingly skilled, purpose-driven and digitally fluent workforce. For European companies operating in or expanding into China, this shift presents both new opportunities and complex challenges – demanding a more strategic, localised, and forward-looking approach to talent management.

A new generation, a new mindset

At the heart of ongoing changes to China's workforce is Gen Z,¹ a new generation stepping into the workforce for the first time and bringing new expectations. This new generation makes purpose-driven career choices and approaches work through a lens

of personal values and digital fluency.

Unlike their predecessors, today's young professionals are not solely driven by salary or job security. They value autonomy, purpose, professional growth and meaningful engagement with their employers.

Many companies have taken notice, but adapting to this mindset takes more than

refreshing a job description. It requires a rethink of what it means to be an attractive employer in today's China.

Human resources (HR) goes digital

Digitalisation has also become a driving force in HR. The entire employee journey—from recruitment



¹ Gen Z refers to individuals born between 1997 and 2012, characterised by digital fluency, social consciousness, and strong preferences for flexibility and purpose in the workplace.

to onboarding and engagement—is now expected to be digital-first, seamless and intuitive. Social media platforms like Xiaohongshu, WeChat and Douyin, which are primarily known for consumer engagement, have become crucial channels for employer branding and talent acquisition. Companies aiming to attract top talent must now establish a presence in these digital spaces where young professionals interact, explore job opportunities and evaluate company cultures.

Beyond first-tier cities

Even with compelling branding and advanced digital tools, hiring in China's top-tier cities remains a challenge. The competition for skilled talent—particularly in sectors like research and development (R&D), technology, engineering, and environmental, social and governance (ESG)—is intense. Retention is equally difficult, with high turnover rates adding pressure to already stretched HR teams.

More companies are now focussing their recruitment efforts in second- and third-tier cities, where the talent pool is characterised by:

- lower turnover and higher loyalty, as employees are often more rooted in their communities;
- comparable quality of talent at lower cost, especially in technical and vocational fields; and
- willingness to invest in long-term development, providing fertile ground for sustainable growth.

The strategic value of internships

One of the most underrated tools in building future talent pipelines is the internship. At first glance, interns may not appear to be strategic assets. But

for companies thinking long-term, structured internship programmes can be key to building loyalty, developing internal capabilities and gaining early access to promising talent.

Local interns offer cultural fluency and a strong understanding of domestic consumer behaviour. International interns bring something equally valuable: a global mindset and cross-cultural competence. They often act as a bridge between headquarters and local teams – supporting alignment and communication across borders.

Legal considerations for hiring interns

Hiring interns in China requires careful adherence to local regulations. For local students, internships often require approval from their universities and must be tied to academic programmes.

For international interns, the process is more complex. Companies must ensure compliance with visa regulations, typically requiring either a short-term work visa or business visa issued in advance. Additionally, stipends, insurance coverage, and official contracts may be required depending on the region and institution involved. Partnering with legal or HR specialists can help companies avoid compliance risks and maintain strong employer reputations.

Building a sustainable talent pipeline

To thrive in China's fast-changing talent landscape, European companies must adopt a forward-looking HR strategy. It is no longer enough to fill vacancies. Businesses must invest in employer branding, enhance the employee experience, and align with the values of the modern workforce.

Practical steps businesses can take

- Establish long-term partnerships with local universities for pipeline development.
- Customise employee value propositions for different regions and demographics.
- Adopt hybrid and flexible work models to appeal to digitally native professionals.
- Develop local leadership to bridge cultural gaps and improve retention.

China's talent landscape is undergoing a rapid and profound transformation. For European companies, success in this market will depend on more than just adapting to change – it will require leading it. By embracing digital HR practices, understanding the expectations of a new generation, expanding into emerging talent hubs, and investing in long-term talent development strategies like internships, businesses can future-proof their workforce. The companies that proactively align with these shifts—while staying compliant and culturally aware—will not only gain a competitive edge in China but also set a strong foundation for sustainable growth across Asia. **BE**

Roland Brouwer is the regional director for Europe and international relations at **BIPO**, a global HR and payroll solutions provider. He plays a key role in supporting European companies operating in Asia, especially in China, by helping them navigate regulatory, cultural and talent-related challenges.

BIPO is a global provider of payroll and people solutions, supporting businesses across 160+ markets. With a strong presence in Asia and Europe, BIPO combines local compliance expertise with cloud-based technology to help organisations manage their global workforce. Its HR solutions enable companies to simplify operations, enhance the employee experience, and remain agile in a competitive landscape.

Media Watch

Chamber publishes survey on impact of US-China trade war

The European Chamber launched its *Flash Survey on the US-China Trade War* on 8th May, at an event attended by 40 journalists. Chamber President Jens Eskelund was interviewed by *DW* immediately after the session. Within 48 hours of the report's launch, 26 original articles were published.

International media coverage largely focussed on the growing uncertainty that European companies operating in China are facing and the trade war's damaging impact on business confidence. Domestic media focussed on the potential opportunities arising from the United States (US)-China trade war, with European companies seen as more reliable partners than US suppliers.

Chamber comments on US-China reciprocal tariff reductions

On 12th May, the United States (US) and China issued a joint statement declaring that the two sides had agreed to lower tariffs imposed on each other's goods, following trade negotiations in Geneva. It was announced that the tariff reductions would remain in place for 90 days pending further negotiations. US tariffs on Chinese imports dropped from 145 per cent to 30 per cent, while Chinese tariffs levied on US goods decreased from 125 per cent to 10 per cent. That same day, the Chamber published a statement on the development, which was cited by media including the *NYT*, *NPR*, the *BBC* and *China Daily*. The *FT* published the Chamber's statement in full.



DW interview with President Jens Eskelund on the US-China trade war

Media: *DW*

Date: 8th May 2025

EU companies in China see some benefit from Donald Trump's trade war

Survey finds high tariffs hurting European businesses but also offering chance to win market share from US rivals

FT article on the *Flash Survey*

Media: *FT*

Date: 8th May 2025

5/12/2025, 9:33:01 AM

Joseph Leahy

European Chamber of Commerce cautious on temporary tariff cut

The European Chamber of Commerce in China has said that while it was "encouraged" by the US-China deal, "uncertainty remains".

The chamber, which has long advocated for China to reduce its trade surpluses by stimulating domestic demand, said it remained cautious in part because the reduction in the tariffs was still temporary but also because "of the erratic nature in which these tariffs were implemented in the first place".

It added that it hoped both sides would "avoid taking measures that will disrupt global trade and result in collateral damage for those caught in the crossfire".

The *FT* covered the Chamber's statement on US-China tariffs

Media: *FT*

Date: 8th May 2025

U.S. and China Agree to Temporarily Slash Tariffs in Bid to Defuse Trade War

The White House backed off from the steepest levies, as the costs of an all-out trade war with China threatened global economic growth.

NYT article on US-China mutual tariff cuts

Media: *NYT*

Date: 12th May 2025



CNN interviews President Eskelund on the *Business Confidence Survey 2025*

Media: CNN

Date: 28th May 2025

Doing Business in China Is Getting Harder, but Its Exports Are Hard to Resist

European companies operating in China say the market has become increasingly challenging because of weak economic demand and opaque government rules on business.

NYT article on China's deteriorating business environment

Media: NYT

Date: 28th May 2025

Chamber launches Business Confidence Survey 2025

On 28th May, the European Chamber published its *Business Confidence Survey 2025* (BCS), with a total of 32 journalists joining the report's official launch event. Prior to this, embargoed media roundtables were held on 26th and 27th May. In addition, Chamber President Jens Eskelund had an exclusive interview with CNN prior to the BCS's publication, while interviews with CCTV, ARD, China Times and China Business Herald took place shortly after the publication of the report. Within 24 hours of its launch, 27 original articles had been published on the BCS.

International media coverage predominantly focussed on the deterioration in sentiment that has occurred over the past year, highlighting that European business confidence currently sits at or around record low levels for many key metrics. Articles by several domestic Chinese media outlets also focussed on this theme. The SCMP's and Caixin's coverage centred on how escalating trade, geopolitical tensions and concerns about China's economic development are causing a growing share of European companies to re-evaluate their China strategies.

Chamber comments on China's rare earth export controls

On 4th April, China's Ministry of Commerce and the General Administration of Customs announced export controls on several rare earth elements. While the export controls appear to be a reaction to US tariffs, they are global in scope, meaning they impact the export of rare earth elements from China to the rest of the world, including the European Union.

The Chamber published three statements on the development, which were proactively shared with media. The Chamber's comments were widely cited in international media, including by the NYT, the FT, Nikkei Asia, AFP, the SCMP and CNBC, focussing on challenges faced by the Chamber's member companies when applying for export licences. Domestic media outlets also adopted some quotes from the statement, highlighting that China had granted more export approvals of rare earth elements to European companies.

China Hints at Rare Earths Progress With E.U. Before Talks With U.S.

Beijing has approved more export licenses for the critical minerals and magnets in recent days, but supplies remain scarce and factories in the West are running out.

NYT article on China's rare earth export controls

Media: NYT

Date: 6th June 2025

EU restricts Chinese medical firms' access to procurement contracts under IPI

On 2nd June, the European Union's Member States voted to use the bloc's International Procurement Instrument (IPI) to restrict Chinese medical device manufacturers' access to their public procurement markets. On 4th June, the Chamber proactively sent a statement to media stating that the European Chamber supports the end goal of this action, which is to ensure that European companies have the same access to China's procurement market as Chinese companies enjoy in Europe. The statement was quoted by the SCMP and MedWatch.

Events Gallery

BEIJING, 19TH JUNE 2025

Insight China | Is China's Economy Turning the Corner?



- Geopolitical tensions and market uncertainties are significantly impacting China's economic prospects within the evolving global landscape.
- Emerging signs of economic recovery in China prompt questions about their sustainability, with important implications for both domestic and international policymakers.
- Chinese factories are investing in e-commerce and high-end manufacturing to boost growth, though challenges remain in job creation.

BEIJING, 25TH JUNE 2025

Unlocking Opportunities in China's Silver Economy – A Growing Market for Foreign Investors



- Provincial governments are actively implementing the national silver economy strategy through tailored local policies.
- China's silver economy exhibits stark regional differences, with some areas having large elderly populations with limited spending power, while other areas are home to seniors with higher disposable income.
- Key consumer priorities for Chinese seniors include healthcare, trusted nutrition products and niche travel/entertainment opportunities, driving market focus.

SHANGHAI, 5TH JUNE 2025

Business Confidence Survey 2025 Shanghai Launch



- European companies in strategic sectors need long-term mitigation plans as certain products may face declining viability due to increasing market access challenges in China.
- Continuous investment in innovation is crucial for European firms to stay competitive amid rapid technological advancements by Chinese companies.
- European businesses should align their strategies to handle policy risks, actively communicate market access issues with authorities, and approach future investments cautiously in the Chinese market.

SHANGHAI, 12TH JUNE 2025

How Does Sustainable Corporate Governance Drive Business Success?



- Diversity, equity and inclusion initiatives must be adapted from global frameworks to fit the specific cultural and workplace realities of different localities, as demonstrated by Merck's approach in China.
- Embedding environmental, social and governance (ESG) into corporate DNA requires, clear accountability and ongoing leadership engagement on the financial implications of ESG matters.
- ESG success depends on establishing multidisciplinary teams with formal roles and cross-functional communication.

TIANJIN, 3RD JULY 2025

2025 Emergency Management Regulations on Dangerous Chemicals Management



- Safety supervision for companies has become stricter, more precise and smarter.
- On-site inspections by the Emergency Management Bureau mainly focus on the compliance of a factory's overall site layout, the implementation of safety procedures, the automation of dangerous processes and the safety management of dangerous operations.
- Safety production liability insurance is a mandatory commercial insurance for high-risk industries with a public welfare role. Companies pay premiums to obtain compensation coverage and accident prevention services provided by the insurer.

NANJING, 24TH JUNE 2025

European Business in China – Business Confidence Survey Launch 2025 and Business Networking



- Digitalisation and differentiation will be the two primary tools for competing in the future market.
- Supply chain adjustments have continued, with more companies currently onshoring than offshoring.
- Despite the overall negative sentiment, companies operating in Jiangsu Province reported significantly improved conditions.

SOUTH CHINA, 17TH JUNE 2025

Shenzhen 2024 Tax Year GBA IIT Subsidy Policy Briefing



- Member companies were briefed on how to identify their eligibility, prepare documentation, and complete the digital submission process for the 2024 Greater Bay Area (GBA) Individual Income Tax (IIT) subsidy.
- Foreign enterprises should actively monitor policy trends and develop their operations and talent strategies accordingly.

SOUTHWEST CHINA, 10TH JUNE

EU SME Government Dialogue in Chongqing



- Small and medium-sized enterprises (SMEs) remain a vital force in economic development.
- While eastern cities lead in SME development environment rankings, other regions are rapidly catching up.
- Currently, European SMEs prioritise: access to financing and reduced financial burdens, streamlined administrative procedures and protection of SME rights (late payments and intellectual property).

Advisory Council News

DHL's E-Commerce Trends Report 2025: AI and social media reshaping online shopping in Asia Pacific

DHL eCommerce has released its *E-Commerce Trends Report 2025*, drawing on insights from 24,000 online shoppers across 24 key markets worldwide. For the Asia Pacific region, results show that delivery remains a significant barrier to purchase completion, with 77 per cent of Asia Pacific shoppers abandoning their carts when their preferred delivery options are unavailable. Social commerce continues to rise in popularity, with 85 per cent of the region's consumers expected to shop primarily through social media by 2030, bypassing traditional retail sites. Meanwhile, artificial intelligence (AI)-driven shopping tools are in high demand, as 81 per cent of shoppers seek features such as virtual try-ons and voice search to assist their purchasing decisions.

This year's study comprises eight chapters, featuring six shopper types across four generational segments, and highlights how evolving consumer expectations are reshaping the future of online retail. While the report addresses an extensive range of topics from cross-border purchasing to shoppers' views on sale days like Black Friday, four key

What's trending among Asia Pacific's online shoppers?

Are you one of them? DHL eCommerce unveils survey results from E-Commerce Trends Reports 2025.

Virtual try-ons, voice-enabled product search, AI shopping assistants



Photo: HDL

findings stand out: the transformative impact of AI and social commerce on online shopping, the crucial role of delivery options in converting carts, and sustainability shaping customer loyalty.

Strong performance in China: Knorr-Bremse secures new contracts and strengthens position in world's largest rail market

Thanks to customer confidence and continuous innovation, Knorr-Bremse has made the most of a period of dynamic economic development to win new business in China, the world's largest rail market. Based on more than three decades of strong in-country presence, including local supply chains

and production facilities backed by deep customer understanding, the company has been awarded a number of new projects – including projects for international export.

Dr. Nicolas Lange, member of the Executive Board of Knorr-Bremse AG with global responsibility for the Rail division: “Knorr-Bremse has been a highly reliable partner to the Chinese rail industry for over 30 years. Our latest successes reflect our profound understanding of the needs of our customers in China. These new projects in the metro rail segment show that even in challenging times, we can benefit from the dynamic development of China's rail industry.”

New projects for China's megacities

Over the last quarter, Knorr-Bremse has been awarded contracts to equip

trains for multiple metro operators by CRRC, the world's largest train manufacturer. As a result, Knorr-Bremse will fit complete braking systems – including electropneumatic brake control systems, bogie equipment and actuators – to metro fleets destined for the cities of Guangzhou (336 railcars) and Fuzhou (192 railcars), as well as Wuhan, Shenzhen and Ningbo. Knorr-Bremse will supply technologies for a total of around 150 trains over several years, representing a combined order volume in the mid double-digit million-euro range.

Production hub for export markets

Apart from the domestic market, China is an increasingly attractive source of export business for Knorr-Bremse. Among other projects, the company was recently awarded contracts to equip more than 100 CRRC locomotives destined for Kazakhstan with braking systems, customised and produced in Suzhou. Similarly, Knorr-Bremse is outfitting new light rail vehicles (LRVs) for export to the Kazakh capital Astana and Belo Horizonte in Brazil with braking systems.

There are several reasons for China's growing appeal as an export hub.

Knorr-Bremse works very closely with Chinese train manufacturers, who are increasingly supplying trains to markets around the world, where Knorr-Bremse has proven experience and an existing service network. Besides, Knorr-Bremse is optimising its global organisation as part of the company's strategic programme, BOOST. This includes transforming the company's primary plants in Suzhou and Palwal (India) into larger manufacturing hubs capable of supplying products to customers in export markets faster, more flexibly and more efficiently than ever before.

Bayer extends partnership with Tsinghua University to accelerate translation of cutting-edge science into pharmaceutical innovation

Bayer and Tsinghua University (THU) announced the signing of the sixth phase of their collaboration agreement, aiming to further facilitate

the translation of scientific research outcomes into drug discovery and development, focussed on key selected areas of interests, such as oncology, cardiovascular and renal diseases, neurology and rare diseases, and immunology, accelerating cutting-edge scientific research across the pharmaceutical value chain.



Photo: Bayer

Merck launches AAW™ Workstation to advance lab automation


Merck, a leading science and technology company, has launched the AAW™ Automated Assay Workstation, a solution powered by Opentrons, a leader in lab automation and accessible robotics. The workstation automates routine laboratory experiments previously performed manually, reducing hands-on time and ensuring consistency in results across diverse experimental settings. This launch follows the earlier announcement of a multi-year partnership with Opentrons Labworks Inc., to enhance laboratory workflows through automation. 



Photo: Knorr-Bremse

Tell Us Your Big News

European Chamber members are welcome to add news items on their own activities to our website, and share it with over 1,700 members.

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European Chamber

CARBON NEUTRALITY ACTION

WORKING WITH CHINA TOWARDS 2060

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- Advocating for EU-China cooperation on decarbonisation
- Facilitating coordinated efforts among the Chamber's membership
- Working with China to achieve its 2060 carbon neutrality goal