



The German economy in competition with China

DIHK special survey, September 2026



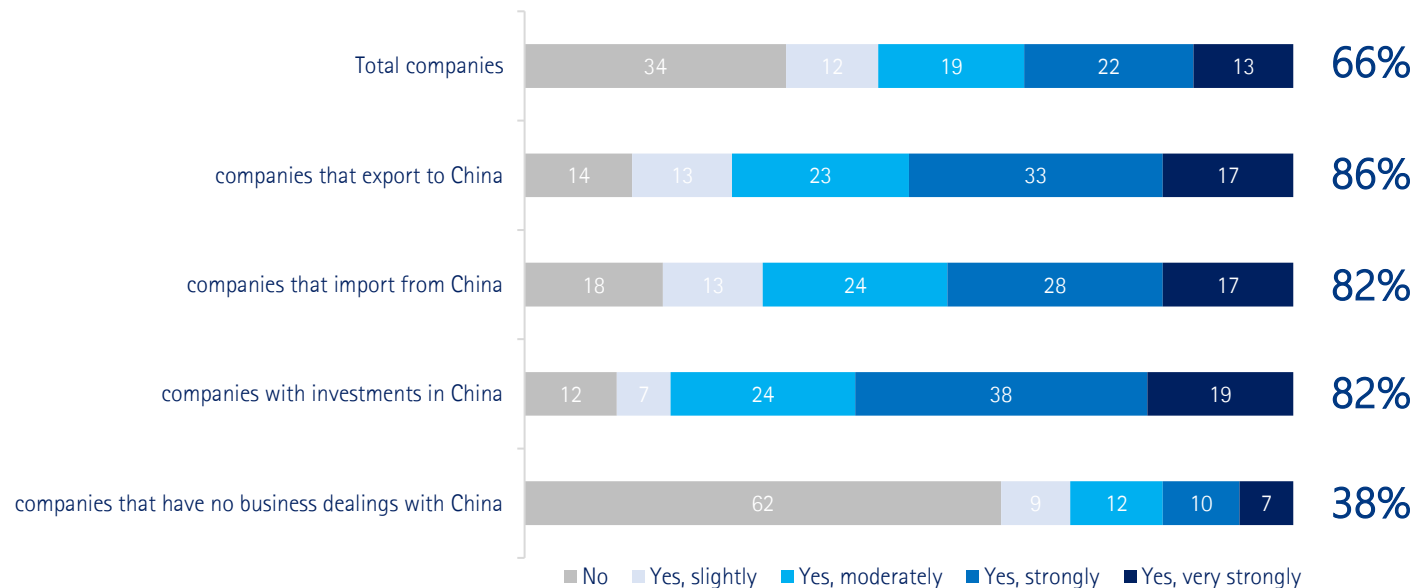
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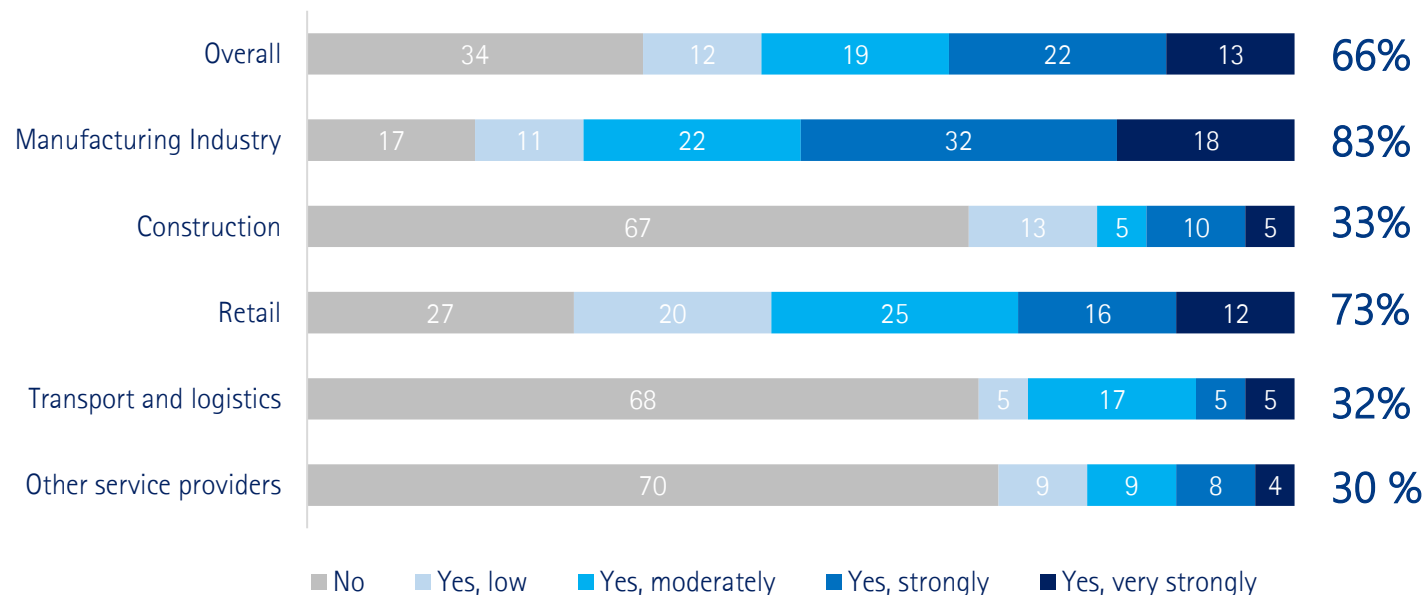
Increasing competition is affecting many companies

Proportion of companies feeling the effects of growing competition from Chinese producers as a percentage



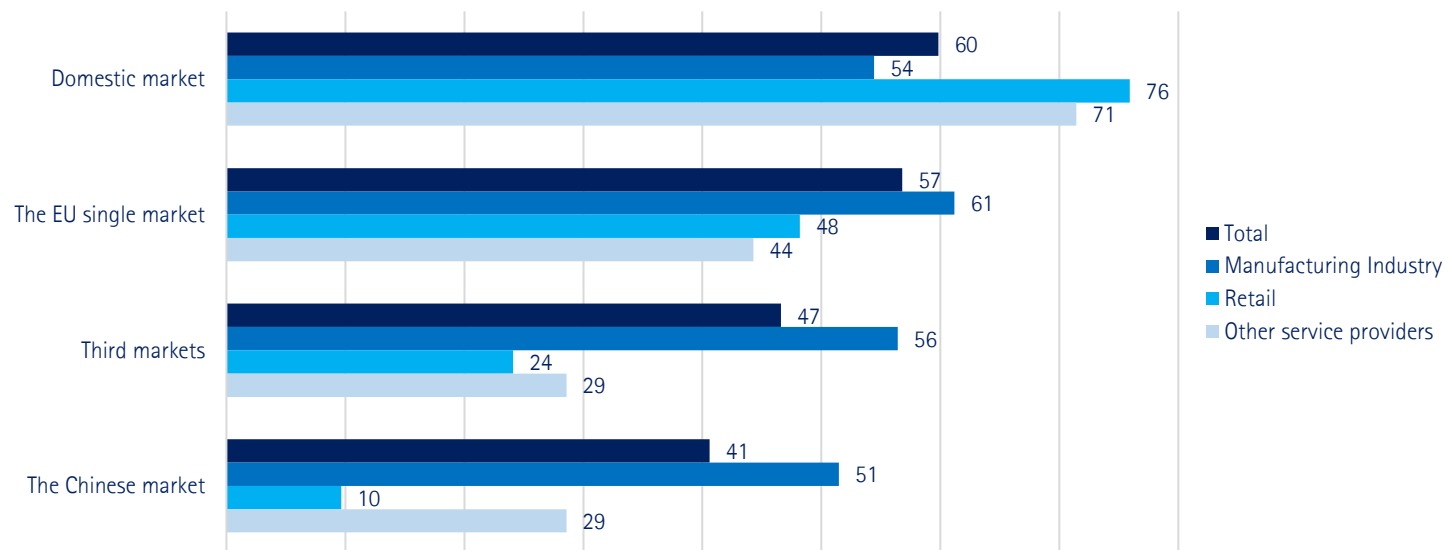
Increasing competition is affecting many companies

Proportion of companies feeling the effects of growing competition from Chinese rivals
as a percentage



Competitive pressure is evident across all markets

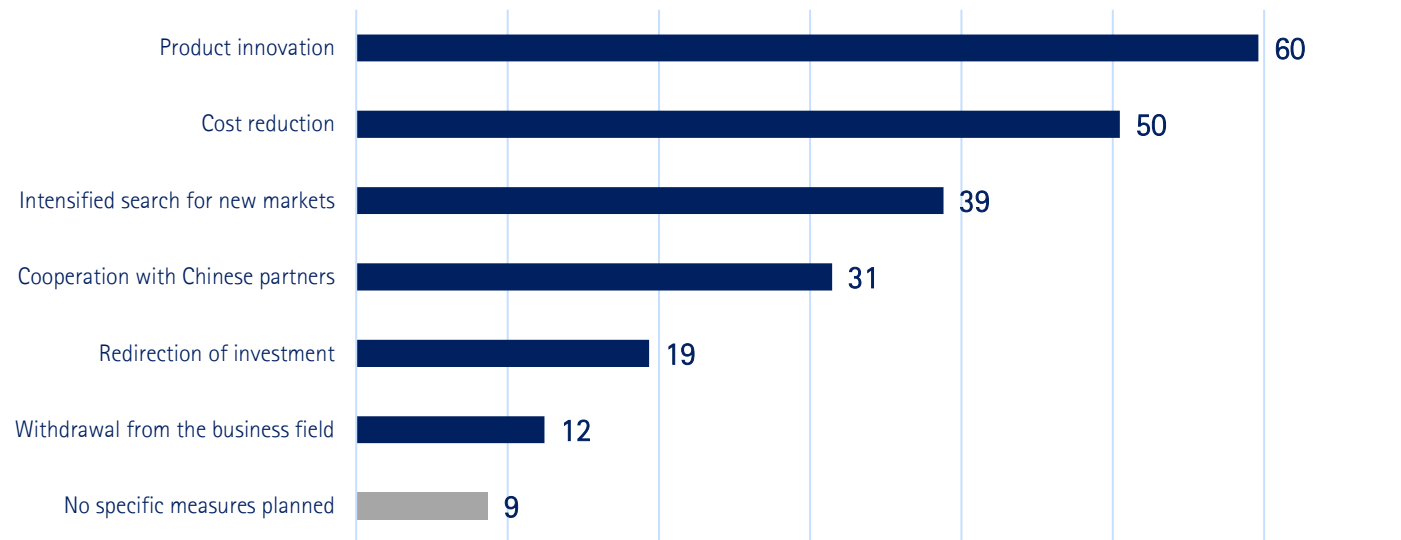
Proportion of companies feeling the effects of growing competition from Chinese rivals
as a percentage



Companies are responding primarily by ...

How is your company responding to increasing competition from China?

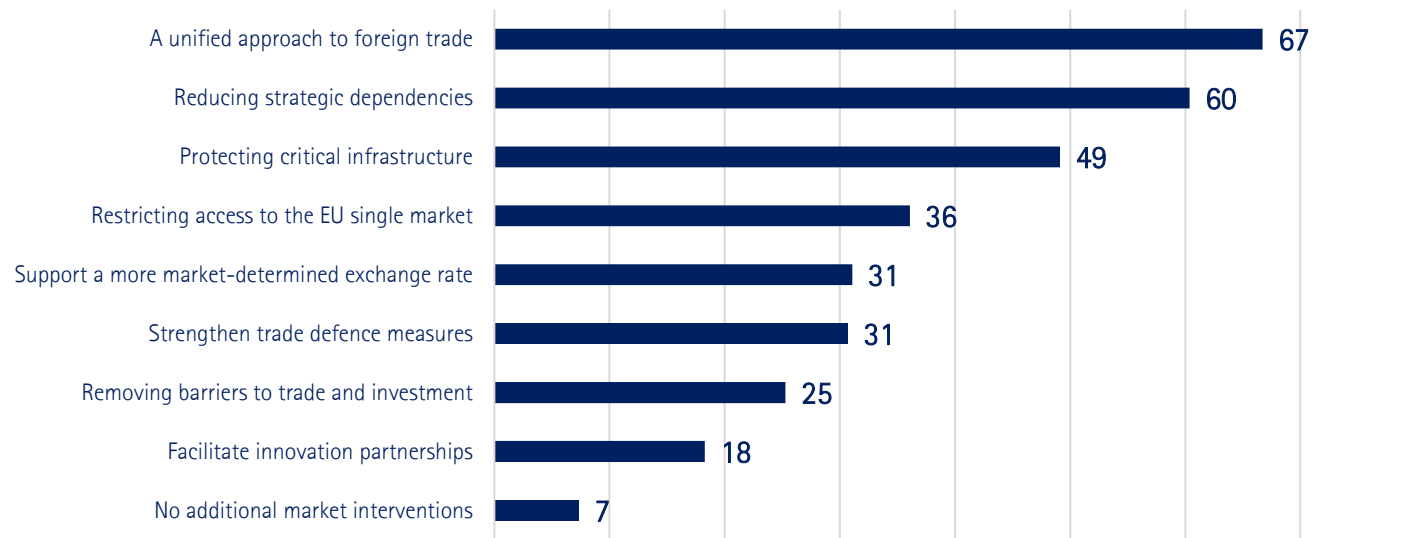
Figures in per cent, multiple answers possible, data from companies facing growing competition



In particular, businesses expect the EU to ...

What economic policy measures should the EU take with regard to China?

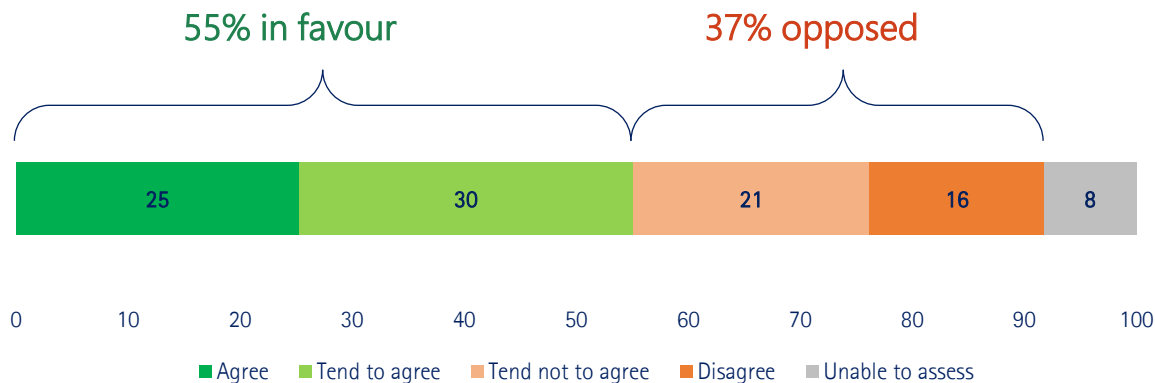
Figures in per cent; multiple answers possible



Majority supports tougher measures despite potential burdens

“Should the EU introduce tougher trade policy measures against China to counter distortions of competition, even if my company were to be affected by negative consequences (e.g. administrative costs, higher prices, tariffs, retaliatory measures, supply bottlenecks)?”

Figures in per cent



Questionnaire

1. Is your company experiencing increasing competition from Chinese rivals?

- No
- Yes, to a small extent
- Yes, moderate
- Yes, strong
- Yes, very strong

1.a. In which markets does your company feel competitive pressure from Chinese suppliers? (only if 'Yes' was selected for question 1; multiple selections possible)

- Domestically
- In the EU single market
- On the Chinese market
- In third-country markets

1.b. How is your company responding to the increasing competition from China? (only if 'Yes' was selected in question 1; multiple answers possible)

- Cooperation with Chinese partners
- Intensified search for new sales markets
- Cost reduction
- Product innovation
- Redirection of investment
- Withdrawal from the business field
- No specific measures planned

Questionnaire

2. What economic policy measures should the EU take with regard to China? (Multiple answers allowed)

- Adopt a joint and coordinated approach to foreign trade
- Reduce strategic dependencies (e.g. through supply chain diversification)
- Strengthen trade defence measures (e.g. by imposing tariffs)
- Restrict access to the EU single market more strictly ('Buy European')
- Exclude Chinese companies from critical infrastructure projects
- No market intervention, due to concerns about retaliatory measures
- Remove mutual trade and investment barriers
- Facilitate German-Chinese innovation partnerships
- Advocate for a free – and therefore fairer – EUR/renminbi exchange rate
- No assessment possible
- Other (free text)

3. How do you assess the following statement:

"The EU should introduce stronger trade policy measures against China to counter distortions of competition, even if my company were to be affected by negative consequences (e.g. administrative costs, higher prices, tariffs, retaliatory measures, supply bottlenecks)?"

- Agree
- Tend to agree
- Tend not to agree
- Disagree
- Unable to assess

4. Free text: Would you like to explain in more detail the competitive situation of your company in relation to Chinese suppliers?

Methodology

- The findings are based on a survey conducted by the DIHK and the IHKs amongst their committee members.
- **Between 20 July and 10 August 2026, 1,325 companies** took part.
- Broken down by economic sector, the responses were distributed across the Manufacturing Industry (55 percent), construction (five percent), retail (17 percent), transport and logistics (five percent), other service providers (18 percent) and the hospitality sector (less than one percent).

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