

Surveying the Experts

The State of U.S.-China Relations Entering 2026

FACT SHEET

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AUTHORS

Bonny Lin

Brian Hart

Truly Tinsley

Leon Li

Introduction

2025 was an eventful year for U.S.-China relations. Tensions spiked repeatedly amid a heated trade and tariff war. Despite an easing following the meeting in October 2025 between President Donald Trump and President Xi Jinping, major questions remain about the status and outlook of the relationship.

To shed light on these issues, the CSIS China Power Project surveyed nearly 80 former U.S. government officials and leading China experts on U.S.-China relations. This fact sheet summarizes the most compelling insights from the full report. Note that the online survey was fielded from December 1–18, 2025.

Current and Future U.S.-China Relations

- While 26 percent of surveyed experts agree with the statement that U.S.-China relations were more stable in 2025 than compared to the year before, 57 percent disagree, assessing the relationship as less stable in 2025.
- About one-third of experts expect bilateral relations to become more cooperative in 2026, one-third believe relations will become more antagonistic, and one-third assess that relations will stay about the same.
- About 34 percent of the experts surveyed believe that neither the United States nor China will keep its commitments made in Busan, South Korea, and 51 percent believe both sides will make efforts to some commitments but fall short on others.

China's Rare Earth Dominance

- Roughly 70 percent of experts believe China “played its hand well” in leveraging rare earth export controls to pressure the United States and its allies and partners amid trade negotiations.
- Expert assessments suggest that China's dominance in critical minerals will persist for several years, with 52 percent projecting a five-year horizon and 30 percent expecting it could last up to a decade.

Risks of Chinese Military Escalation

- When asked to assess where China may escalate militarily in 2026, 43 percent of experts chose the South China Sea, and 33 percent named the Taiwan Strait as most likely.

- About 41 percent of respondents said that the risk of a U.S.-China military conflict over Taiwan is higher over the next three years (up until 2028) compared to one year ago.
- Around 57 percent of experts view China's large-scale purges of senior leaders within the People's Liberation Army (PLA) as having a medium impact on PLA readiness—the purges are a major problem for the PLA, but will not prevent China from using significant military force.
- Beyond the South China Sea and Taiwan, 71 percent of survey respondents believe that China could engage in moderate escalation against Japan in 2026, given China's strong criticism of Japanese Prime Minister Sanae Takaichi's November 2025 comments on how Japan could respond to a conflict over Taiwan.

Taiwan

- Roughly 68 percent of experts believe that China views the United States as less committed to supporting and defending Taiwan compared to a year ago.
- About 77 percent of experts assess that Beijing believes the United States would be willing to make some forms of concessions on U.S. policy, of which 24 percent believe China might be confident in seeking a major concession.

China's Influence in the Global South

- Experts selected Africa (57 percent) as the top region and Southeast Asia (38 percent) as the second region where China could gain the most influence in the next three years. Latin America and the Caribbean (28 percent), the Middle East (24 percent), and Central Asia (22 percent) were in the third tier.

CRINK Cooperation

- About 56 percent of experts were concerned about cooperation between China, Russia, Iran, and North Korea (CRINK), whereas 44 percent of the experts were not very concerned or not concerned at all.
- About 70 percent of experts said that Russia would be willing to provide not only diplomatic and economic support to China if China invaded Taiwan but also limited military support. Almost no experts believed Russia would intervene directly with its forces.