

The China–Taiwan Weekly Update



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Data Cutoff: August 12, 2025

The China–Taiwan Weekly Update is a joint product from the Institute for the Study of War and the American Enterprise Institute. The update supports the ISW–AEI Coalition Defense of Taiwan project, which assesses Chinese campaigns against Taiwan, examines alternative strategies for the United States and its allies to deter the Chinese Communist Party’s (CCP) aggression, and—if necessary—defeat the People’s Liberation Army (PLA). The update focuses on the Chinese Communist Party’s paths to controlling Taiwan and cross–Taiwan Strait developments.

The PRC has increased its coercive activities targeting the Philippines in the South China Sea, as Manila has expanded its coalition-building efforts toward other Indo-Pacific countries. The Philippines and India conducted their first-ever combined naval patrol in the South China Sea on August 3-4 in the Philippine Exclusive Economic Zone (EEZ) east of Luzon.[1] Two Philippine missile frigates, an Indian missile destroyer, an Indian anti-submarine corvette, an Indian fleet tanker, and several aircraft participated in the “maritime cooperative activity,” which featured combat exercises involving surface warfare, anti-air warfare, and anti-submarine drills.[2] The end of the exercise coincided with Philippine President Ferdinand Marcos Jr.’s state visit to India on August 4-8. The Philippines and India signed several defense cooperation agreements and announced that they would hold more bilateral and multilateral maritime drills in the future.[3] The PRC responded to the Philippine-Indian patrol with its own “routine patrol,” tailing the Philippine and Indian ships. PLA Southern Theater Command (STC) spokesperson Tian Junli accused the Philippines of “co-opting foreign countries to disrupt the situation in the South China Sea.”[4] PRC Ministry of Foreign Affairs (MFA) spokesperson Guo Jiakun said on August 5 that territorial and maritime disputes should be resolved diplomatically between the parties concerned and that no “third party” should intervene.

The Philippines has likewise expanded cooperation with Taiwan. President Marcos told Indian media on August 6 that the Philippines would be involved in any conflict in the Taiwan Strait due to its geographical proximity and the requirement to evacuate the large number of Philippine nationals who live and work in Taiwan.[5] The PRC MFA accused the Philippines on August 8 of reneging on its promise to abide by a “one-China policy” and warned it against “playing with fire” by interfering in PRC “core interests. [6] Marcos claimed on August 11 that the PRC had misinterpreted his comments, saying that his country did not want war but inevitably would be pulled “kicking and screaming” into the

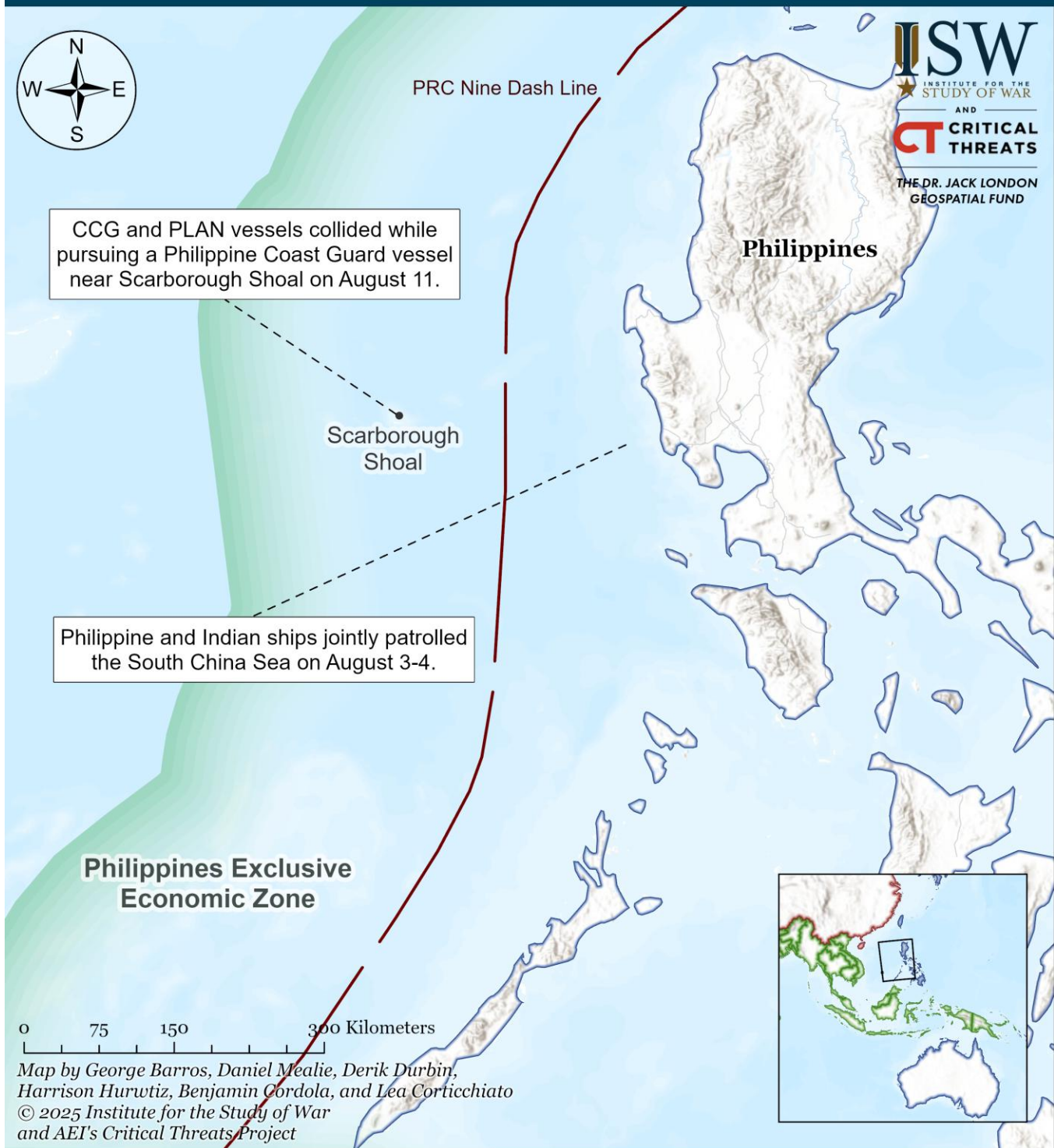
conflict, if one erupts.[7] The *Washington Post* reported on July 14 that the Philippine government and defense community increasingly see the Philippines' security as intertwined with Taiwan's and have increased engagement with Taiwan.[8] The two countries reportedly conducted a combined coast guard patrol in the Bashi Channel, the waterway between Taiwan and the Philippines, in May 2025.[9] Manila loosened restrictions on government officials interacting with Taiwanese officials in April.[10] Philippine academics have since participated in meetings with Taiwanese generals, while Taiwanese military personnel observed a US-Philippine combined exercise in June.

Philippine coalition-building efforts coincides with an increased PRC presence and coercion around disputed features in the South China Sea, particularly Scarborough Shoal. CCG and PLA Navy ships tried to block a Philippine resupply mission to fishermen near the shoal on August 11, resulting in a collision between a PLA and CCG ship.[11] The Philippines released video footage that showed the PLA destroyer *Guilin* move in front of the CCG ship 3104 as it was pursuing a PCG ship, causing the crash.[12] The footage showed serious damage to the CCG ship. PCG spokesperson Jay Tarriela reported that the PCG resupply mission was successful and that the Philippines offered support and medical assistance to the CCG crew following the collision.[13] PRC MFA spokesperson Lin Jian did not acknowledge the crash but blamed the Philippines for "deliberate infringements and provocations." [14] Lin claimed that the Philippines had sent a "number of coast guard ships, official ships, and so-called fishing boats" into Scarborough Shoal's territorial waters and that the PRC had been defending its territory.[15] The CCG claimed that the PRC's operation was "professional, standardized, legitimate and legal" and accused the Philippines of using coast guard ships and official vessels to intrude into PRC waters "under the guise of transporting supplies to fishing vessels." [16]

The collision incident reflects increasingly aggressive PRC tactics around Scarborough Shoal and will likely intensify tensions as the PRC tries to save face. The involvement of a PLA destroyer in blocking operations represents an escalation. The CCG has typically handled direct confrontations with Philippine ships in previous years, both to control escalation and to portray PRC operations as "legitimate law enforcement" in PRC waters. PLA ships, when present, often formed a perimeter around the area but did not directly engage foreign ships. The PLA's lack of experience in coordinating blocking maneuvers with the CCG may partly explain the collision. The PLA has become increasingly involved in enforcing PRC claims in the South China Sea over the past year, however, patrolling along the PRC's "Nine-Dash Line" boundary claim, conducting increasingly frequent drills around Scarborough Shoal, and shining lasers at Philippine government planes.

Events in the South China Sea

August 4-11



South Korea postponed combined exercises with the United States, possibly to reduce inter-Korean tensions. North Korea could seek to leverage South Korean policy objectives to force further concessions from Seoul. South Korea's Joint Chiefs of Staff (JCS) decided to postpone 20 out of 40 planned field training exercises (FTXs) under the Ulchi Freedom Shield (UFS) exercise, a large-scale exercise involving over 18,000 troops each from South Korea and US Forces Korea (USFK). The USF combines Command Post Exercises (CPX) and FTXs based on simulated war scenarios against North Korea.[17] The JCS cited an "extreme heatwave" as the reason for postponement during an August 7 press conference, however, a South Korean Unification Ministry official noted the postponement likely stemmed from Unification Minister Chung Dong-Young's July 28 recommendation to President Lee Jae-myung to scale down the drills.[18] Chung has promoted policies aimed at reducing inter-Korean military tensions and building a peaceful atmosphere on the Korean Peninsula since taking office on July 25.[19]

North Korea has continued to reject outreach from the Lee administration. Kim Yo Jong, Vice Director of the Propaganda and Agitation Department of the Workers' Party of Korea (WPK) and sister of WPK General Secretary Kim Jong Un, dismissed these efforts as "meaningless" on July 28.[20] North Korea's Defense Minister No Kwang Chol also issued a statement on August 11 condemning the United States and South Korea for their "confrontational military stance," accusing them of "posing a serious threat" to the security of the Korean Peninsula.[21] North Korea conducted artillery live-fire military drills on August 12, claiming that the event demonstrated its will to deter "the military gangsters across the border." [22]

North Korea's response to the UFS exercise indicates that a reduction in exercise size is insufficient to change North Korea's defense posture or illicit a more positive response from official spokespeople, which the Lee administration seems keen to obtain. The Unification Ministry still plans to advance new proposals to improve inter-Korean relations, including encouraging greater US involvement in peacebuilding efforts.[23] North Korea may seek to leverage South Korea's overture by demanding more significant steps, such as the complete suspension of joint exercises, if it perceives the Lee administration is willing to make further concessions in order to progress towards inter-Korean dialogue and peace.

Key Takeaways

- **Philippines.** The PRC has increased its coercive activities targeting the Philippines, as Manila has expanded its coalition-building efforts with other Indo-Pacific countries, such as India and Taiwan.
- **North Korea.** South Korea postponed combined exercises with the United States, possibly to reduce inter-Korean tensions. North Korea could seek to leverage South Korean policy objectives to force further concessions from Seoul.

Cross-Strait Relations

Taiwan

The Taiwanese Constitutional Court agreed to review petitions challenging the constitutionality of the 2025 central government budget plan. The ruling Democratic

Progressive Party (DPP) and the Executive Yuan (EY) filed two separate petitions.[24] The Control Yuan (CY) had previously filed a petition of its own challenging the 96-percent reduction to its budget under the 2025 central government budget plan, which the Constitutional Court agreed on May 29 to review.[25] Director-General of the Constitutional Court Yang Hao-ching said that judges have discretion on whether to combine the CY petition with the DPP and EY petitions.[26]

The Constitutional Court is currently paralyzed from issuing rulings, however. Seven of 15 court seats have been vacant since November 2024, and the opposition-controlled Legislative Yuan (LY) rejected Taiwanese President William Lai Ching-te's previous nominees in December 2024, almost entirely along party lines.[27] The LY passed an amendment to the Constitutional Court Procedure Act (CCPA), raising the quorum to 10 of 15 justices that same month.[28] The LY once again rejected all of Lai's judicial nominees in July 2025.[29] Director-General Yang said that CCPA revisions do not affect the ability to accept petitions.[30] The court is unable to issue an official ruling without violating the CCPA, however. A ruling may serve as an act of protest or an attempt to exercise the Court's constitutional interpretation powers, but there has been no official indication of such action. The record-level budget cuts and freezes constrain operations in government departments and agencies that are critical to Taiwanese national security, such as the National Defense Ministry, Foreign Affairs Ministry, Coast Guard Administration, and Mainland Affairs Council.

PRC industrial espionage risk undermining Taiwan's economic competitiveness and national security. The Intellectual Property Prosecutions Division of the Taiwan High Prosecutors office investigated six former and current employees of Taiwan Semiconductor Manufacturing Co. (TSMC) on July 28 for illegally obtaining the company's trade secrets related to its 2-nanometer chip development.[31] Taiwan designates semiconductor technology as a "national core critical technology," a classification of emerging technologies central to Taiwan's national interests. Taiwan considers leaking trade secrets related to these technologies to be a violation of its National Security Act.[32]

One of the suspects was an employee of Tokyo Electron, a key supplier of TSMC's semiconductor manufacturing equipment with offices in Taipei.[33] Tokyo Electron is one of the semiconductor manufacturing equipment companies that the United States has sought to prevent from exporting machinery to PRC chipmakers.[34] The company said on August 7 that it had found no evidence that confidential information was transferred to any third parties.[35]

TSMC is frequently targeted for industrial espionage and talent poaching, especially by the PRC. The PRC is developing its semiconductor manufacturing industry to ensure self-sufficiency. Taiwan's Ministry of Justice's Investigation Bureau announced on August 7 that it was investigating 16 PRC companies for illegally poaching scientific talent in Taiwan's semiconductor industry.[36] Cybersecurity firm Proofpoint attributed a recent phishing campaign targeting Taiwanese semiconductor companies to a PRC state-sponsored operation aimed at exfiltrating sensitive information.[37]

Industrial espionage within Taiwanese semiconductor manufacturing could threaten Taiwanese economic security. Taiwan's dominance in the semiconductor industry has made it a key actor in the global technology supply chain. Proponents of the "silicon shield" theory suggest that Taiwan's importance to the global semiconductor supply acts as a deterrent against PRC invasion.[38]

Taiwan and Canada signed a memorandum of understanding to provide Taiwan with dark vessel detection equipment. Such equipment could bolster Taiwan’s defenses against PRC dark vessels. “Dark” vessels operate by turning off their automatic identification systems (AIS) to avoid detection, necessitating detection by satellite. Canada developed its dark vessel detection system to track illegal fishing and provided access to the Philippines, which has used the system to track PRC research vessels within the Philippine exclusive economic zone (EEZ).[39] Canada will also train Taiwanese personnel in satellite imagery analysis to ensure effective monitoring.[40] Taiwan’s Ministry of Foreign Affairs (MOFA) reported that “Taiwan and Canada will work together to protect the marine environment and economy, combat illegal, unreported and unregulated (IUU) fishing and other maritime activities conducted by vessels in an anonymous manner, and jointly maintain the prosperity and stability of the Indo-Pacific region” in an August 11 readout.[41]

The new detection system could improve Taiwan’s safeguards against PRC coercion involving dark vessels. The International Convention for the Safety of Life at Sea requires large vessels to maintain their AIS for tracking purposes. Dark vessels are often engaged in malicious activity, including sabotage.[42] A PRC-based, Russian-crewed ship, the *Yi Peng 3*, cut two undersea cables in the Baltic Sea in December 2024 and reportedly deactivated its AIS for part of the voyage.[43] Taiwan has observed PRC-crewed ships engaged in suspicious behavior near its undersea cables. China Coast Guard (CCG) vessels have also deactivated their AIS while patrolling near Taiwan’s outlying island of Pratas, including during Taiwan’s Han Kuang military exercises.[44]

China

The *Wall Street Journal* reported on August 10 that PRC authorities detained Director General of the Chinese Communist Party (CCP) Central Committee International Liaison Department (ILD) Liu Jianchao, citing unnamed sources.[45] The PRC has not addressed reports of Liu’s rumored detainment at the time of writing. Liu, as head of the ILD, presides over the CCP’s conduct of relations with foreign political parties, especially communist and socialist countries. Liu’s position requires adherence to and significant discussion of CCP ideology.[46] Liu previously headed the CCP Central Commission for Discipline Inspection’s (CCDI) Department of International Cooperation. Liu helped lead “Operation Fox Hunt,” the PRC’s sweeping transnational repression campaign to repatriate corrupt officials and political dissidents, while at CCDI.[47] Analysts considered Liu to be a likely candidate to succeed Foreign Affairs Minister Wang Yi due to his “party experience and demonstrated political loyalty.”[48] Liu’s detainment, if true, would be the highest known instance of discipline against a top diplomat since the summer of 2023, when former Foreign Affairs Minister Qin Gang was demoted to a low-level publishing job for a rumored extramarital affair.[49]

Northeast Asia

Japan

PRC state media accused Japan of undermining regional peace by acquiring new military technology and participating in a multi-large deck exercise with the United States and the United Kingdom. Lockheed Martin delivered the first three F-35B Lightning II fighters to Japan on August 7, with five additional aircraft expected to be delivered by March 31, 2026.[50] The aircraft are temporarily stationed at Nyutabaru Air Base in Miyazaki prefecture and will eventually transfer to

the Japan Maritime Self-Defense Force (JMSDF) to operate from the helicopter-carriers JS *Izumo* and JS *Kaga*.^[51] JS *Izumo* is in the final stage of modifications to accommodate the F-35Bs, while JS *Kaga* has completed its upgrades and recently participated in a multilateral multi-large deck exercise with USS *George Washington*, USS *America*, and HMS *Prince of Wales*.^[52] These developments mark Japan's first step towards rebuilding its carrier-launched fixed-wing aviation capability since the end of World War II.^[53] Japan plans to build a fleet of 105 F-35As and 42 F-35Bs, which will make Japan the largest F-35 operator outside of the United States.^[54]

The PRC has not responded at the time of writing. The PRC MFA routinely expresses its firm opposition against Japan enhancing its defense capabilities, however.^[55] The PRC state-affiliated media outlet the *Global Times* accused Japan of breaching its pacifist constitution and pursuing “military normalization” by acquiring offensive weapons such as the F-35Bs.^[56] The article added that Japan's fleet of F-35s, complemented by JMSDF's light aircraft carriers, enhances JSDF's ability to conduct preemptive strikes and island-seizure operations. The PRC is likely concerned that the addition of short take-off and vertical landing-capable F-35Bs will give Japan greater flexibility in intervening in a Taiwan contingency or obstruct the PRC's claim over disputed islands in the East China Sea. The *Global Times* stated in a separate article that the multilateral multi-large deck exercise is evidence of Japan forming a clique with the United States and the United Kingdom and urged the United States to refrain from “encouraging Japan to break away from its post-war pacifist constitution.”^[57] The articles criticized both Japan's acquisition of F-35Bs and the multilateral exercise of undermining regional peace and stability by hyping up the “China threat.”

North Korea

North Korea dismantled propaganda speakers on the inter-Korean border in response to South Korea's preemptive dismantling of its speakers. South Korea's Joint Chiefs of Staff announced that North Korea began dismantling some of its propaganda loudspeakers along the inter-Korean border on August 9.^[58] South Korea proactively removed all 20 of its fixed speakers on August 5.^[59] Former South Korean President Moon Jae-in and Workers Party of Korea General Secretary Kim Jong Un agreed to dismantle both countries' propaganda speakers in 2018, but they were reinstalled in 2024 under former President Yoon Suk-yeol in response to North Korea's launches of trash-filled balloons.^[60]

President Lee Jae-myung welcomed North Korea's dismantling of its speakers, expressing hope for positive inter-Korean relations.^[61] The Lee Administration has continued to publicly urge for the resumption of bilateral dialogue despite Pyongyang's persistent hostile rhetoric.^[62] Lee stated that he will push for a greater role in potential US-North Korean dialogues, which US President Donald Trump has expressed interest in.^[63] Lee and Trump are scheduled to hold a summit on August 25, and inter-Korean relations could be one of the main topics of discussion.^[64]

North Korea could reverse its actions despite the South's appeasement. North Korea reinforced border guard units in 2020 following the failure of the Trump-Kim dialogue and completely severed exchanges with the South. North Korea even demolished a key building at the Kaesong Industrial Complex—a symbol of the conciliatory Sunshine policy and outright rejection of improving ties.^[65]

South Korea

South Korean President Lee Jae-myung and US President Donald Trump will discuss joint defense posture against North Korea, including the role of United States Forces Korea (USFK) and the transfer of wartime operational control (OPCON), during their summit on August 25 in Washington.[66] The PRC may respond aggressively to the potential use of USFK in a Taiwan contingency, while North Korea may view the OPCON transfer as a security gap. Lee will embark on a four-day trip to Washington from August 24 to 26 for his first face-to-face meeting with Trump since taking office. South Korean Presidential Office spokesperson Kang Yoo-jung said on August 12 that the summit will focus on "strengthening the robust ROK-US combined defense posture." [67] The meeting comes amid Trump's calls for an increase in South Korea's defense spending, from the current 2.6 percent of GDP to approximately 3.8 percent, and USFK Commander General Xavier Brunson's support for greater strategic flexibility of USFK to counter the PRC beyond the North Korea threat.[68] The *Wall Street Journal* reported on May 23 that the United States has decided to withdraw 4,500 troops from South Korea and redeploy them to other bases. Department of Defense spokesperson Sean Parnell denied the report, however.[69]

The Lee administration is also actively considering the transfer of wartime OPCON from the United States to South Korea. Lee prioritized this as a presidential campaign pledge and Defense Minister Ahn Gyu-back likewise identified the transfer as a top policy priority.[70] South Korea regained peacetime OPCON in 1994, but the United States has retained wartime OPCON since it was first assumed during the Korean War in 1950.[71] South Korea and the United States agreed to pursue the transfer of wartime OPCON based on conditions at the 2006 summit.[72] South Korea has only partially completed the required evaluation assessments.[73] A four-star South Korean general or the JCS Chairman will command the Combined Forces Command (CFC) once transferred, enabling South Korea to lead its own defense. This aligns with the US concept of strategic flexibility in the Indo-Pacific, which calls on allies to take greater defense responsibilities while allowing US forces to focus on high-priority operations in the region.

Strategic flexibility could entail deploying USFK in a Taiwan contingency, which could burden and deter a PRC invasion. The PRC is likely to respond more assertively to the presence of advanced US military assets on the Korean Peninsula than it did during the 2012 THAAD dispute.[74] North Korea may perceive a security gap on the Korean Peninsula if wartime OPCON is transferred, however. North Korea would likely welcome any reduction in USFK personnel, capabilities, and scaled-back joint exercises. North Korea could also miscalculate South Korea's independent warfighting capabilities if South Korea and the United States accelerate the wartime OPCON transfer by bypassing evaluation assessments.

Southeast Asia

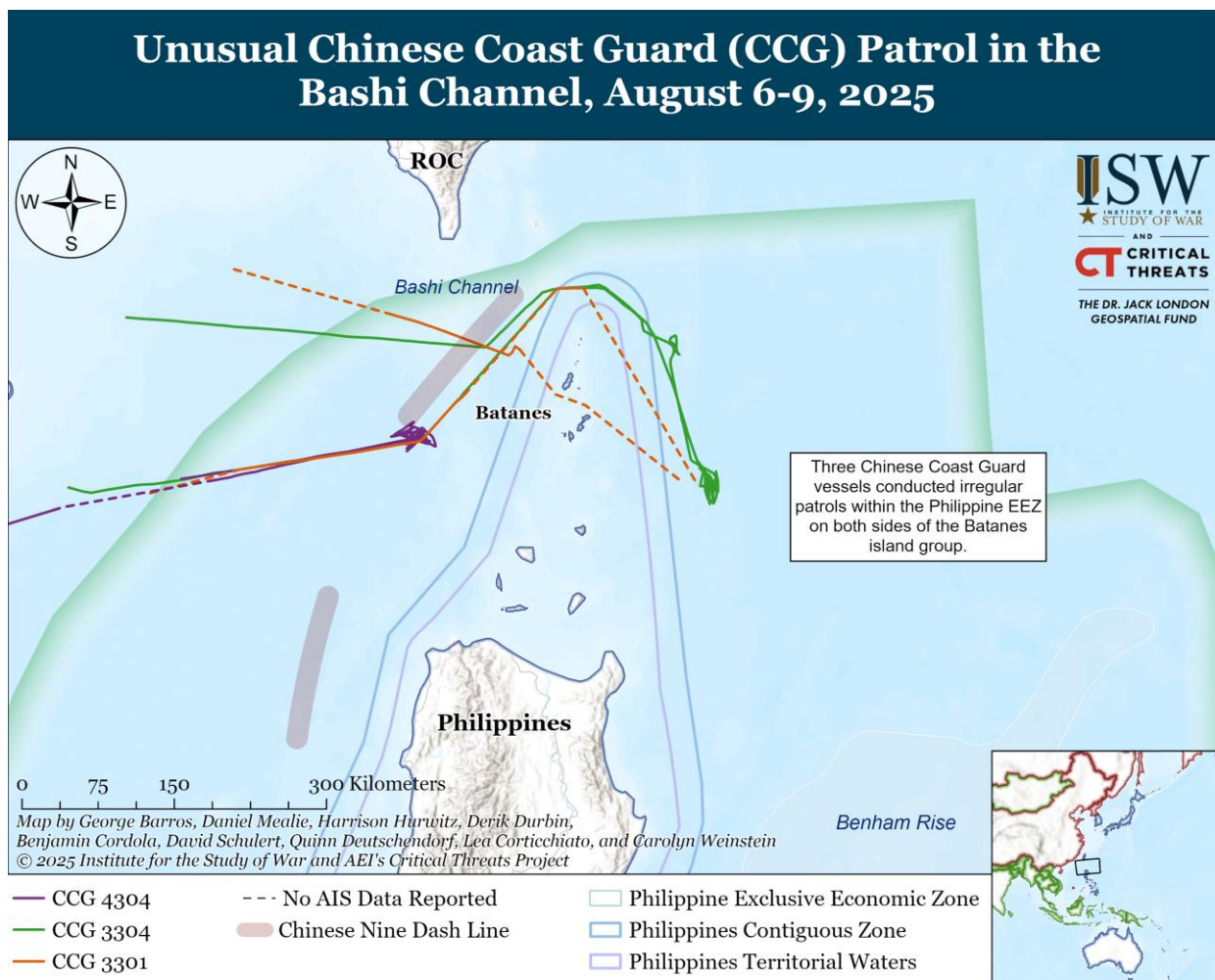
Philippines

Three Chinese Coast Guard (CCG) ships formed a flanking pattern operating on both sides of the Bashi Channel and the Philippines' Batanes island group from August 6-9, the first recorded CCG activity east of the Batanes. CCG Vessels 3304, 3301, and 4304 transited in the Luzon Strait/Bashi Channel and patrolled on both sides of Batanes Province. Data from Starboard Maritime Intelligence shows that some of the ships turned off their Automatic Identification System (AIS) partway through the journey, likely to avoid detection, but the Philippine Navy was able

to track them using Canada's Dark Vessel Detection system.[75] The CCG ignored radio challenges from the PCG. The exact reason for the patrols remains unknown. The northernmost Batanes island, Itbayat, is approximately 84 nautical miles from the southernmost tip of Taiwan. PRC research ships and People's Liberation Army Naval (PLAN) vessels have previously transited the strait, but this is the first observed presence of CCG activity east of the Philippines, outside of China's territorial claims within the "Nine Dash Line" or around Taiwan.[76]

CCG operations near the Batanes may build upon previous activities around the resource-rich Benham Rise, an extinct volcanic ridge located approximately 300 nautical miles southeast of the Batanes.[77] PRC vessels conducted oceanographic surveys of the Benham Rise in 2017, leading to Philippine concerns that the PRC was preparing to claim the territory. The PRC MFA acknowledged the Philippine's maritime rights over the Benham Rise, however.[78] The International Hydrographical Organization approved five Chinese names for features in the Benham Rise in 2018.[79]

CDOT-ISW previously reported on PRC research operations at both ends of the Luzon Strait/Bashi Channel between Taiwan and the Philippines in April, May, and July 2025.[80] The Luzon Strait/Bashi Channel is a strategic maritime chokepoint that the PRC will likely seek to control during a Taiwan contingency.



Oceania

The Solomon Islands excluded the PRC, Taiwan, and the United States from a regional meeting, indicating a possible effort to project non-alignment on Taiwan. The annual Pacific Islands Forum (PIF) includes 16 Pacific Island nations, New Zealand, and Australia. The PIF was founded in 1971 to jointly combat regional challenges, including climate issues.[81] This year's forum will exclude 24 partner nations, 21 of which are "dialogue partner" nations including the PRC, United States, and Japan – a decision approved by the Forum Troika of the Solomon Islands, Palau, Tonga, and the Cook Islands.[82] Solomon Islands Prime Minister Jeremiah Manele said that the PIF was excluding donor states to reevaluate individual relationships with partner countries. Opposition politician Peter Kenilorea Jr. speculated that the Taiwan issue caused the exclusion, however.[83] The PRC successfully lobbied the 2024 PIF meeting to exclude a paragraph about Taiwan's involvement with the forum.[84] The forum considers Taiwan to be a "development partner," a designation the Solomon Islands has pressured other nations to revoke.[85]

The PRC has waged an ongoing diplomatic campaign to isolate Taiwan from its Pacific allies, including by inducing allied countries to switch their recognition to the PRC. Only three Pacific Island states – the Marshall Islands, Palau, and Tuvalu, the former two of have compacts of free association with the United States – still recognize Taiwan.[86] The Solomon Islands switched their diplomatic recognition from Taiwan to the PRC in 2019 and have since become a major recipient of PRC aid.[87] The PRC struck a security cooperation deal with the Solomon Islands in 2022, prompting concerns over potential PRC military involvement in Pacific Island nations. The United States reopened its embassy in the Solomon Islands shortly afterward.[88]

Russia

The PRC and Russian navies conducted combined maritime patrols beginning on August 6, following the 11th annual "Joint Sea" drills in the Sea of Japan.[89] The PRC and Russian naval fleets held their sixth Pacific patrol.[90] Japan Maritime Self-Defense Force (JMSDF) reported that the destroyer CNS *Shaoxing*, supply ship CNS *Qiandaohu*, and destroyer *Admiral Tributs* were observed sailing together on August 7 and transited the Sōya Strait, also known as the La Pérouse Strait, on August 8. This strait is an international waterway connecting the Sea of Japan with the Sea of Okhotsk, and it provides the Russia access to the Pacific Ocean.[91] Russian state media TASS reported on August 12 that those three ships entered Petropavlovsk-Kamchatsky Port in Russia to resupply.[92] All three ships observed had just participated in the Joint Sea drills, and it was the *Shaoxing's* first overseas exercises.[93]

PRC-Russia Combined Naval Patrol Beginning August 6



Iran

Note: A version of this text appeared in ISW's Adversary Entente Task Force update on August 13.

The PRC and Russia may be providing the Iranian-backed Houthis with military equipment in exchange for safe passage through the Red Sea. Anti-Houthi Yemeni media reported on August 6 that Yemeni “counterterrorism forces” intercepted a “major shipment” of military equipment from the PRC bound for Houthi recipients at the Port of Aden.[94] The shipment reportedly contained drones, radio equipment, advanced control units, and weapons parts. The ship had rerouted from the Houthi-controlled port of al Hudaydah following Israeli airstrikes on July 21.[95] The shipment is the latest of several batches of PRC-origin equipment that Yemeni authorities have intercepted en route to the Houthis. Past shipments have included hydrogen fuel cells, drone propellers, and other components.[96] A PRC firm also provided the Houthis with satellite intelligence.[97] It is unclear the extent to which this aid has been directed by the PRC government, however.

PRC aid for the Houthis may be part of an agreement to secure safe passage for PRC ships through the Red Sea and a way to undermine US and Western interests in the Middle East. Bloomberg reported in March 2024, that PRC and Russian diplomats had reached an agreement with the Houthis in Oman to ensure that the Houthis would not target their ships.[98] The Houthis have attacked commercial vessels from various countries in the Red Sea since October 2023, forcing most Western shipping companies to take a much longer route around Africa instead, which has driven up shipping costs.[99] *The New York Times* reported on August 10 that 14 PRC car carrying ships in July, and a similar number in June, safely transited the Red Sea en route to Europe, despite the Houthis sinking two other cargo ships in early July.[100] The report said that continuing shipments through the Red Sea and Suez Canal saves PRC automakers hundreds of dollars per car compared to Japanese, Korean, and European automakers, which have had to redirect shipments around the southern tip of Africa. Some PRC ships, including those belonging to state-owned shipping giant COSCO, are still avoiding the Red Sea, however.[101]

PRC MFA spokesperson Lin Jian did not confirm or deny whether Beijing had made an agreement with the Houthis and instead reiterated the PRC's opposition to attacks on civilian vessels.[102] Lin also said that “all parties concerned” should respect the sovereignty and territorial integrity of countries bordering the Red Sea in a thinly veiled criticism of the US, UK, and Israeli airstrikes on Houthi targets in Yemen. PRC officials have repeatedly called on the Houthis to stop their attacks but have insisted that the Red Sea conflict must be addressed at its root, which they define as the Israeli-Palestinian conflict.[103] The PRC has provided diplomatic cover to the Houthis, abstaining from United Nations (UN) votes that condemned the Houthis in January and July 2025.[104] PRC support for the Houthis is tempered by its continued relations with the internationally-recognized government of Yemen, however, and especially by its desire for good relations with Saudi Arabia and the United Arab Emirates, regional rivals of Iran that fought the Houthis in Yemen since 2015.[105]

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