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Case Study

Coercion Without Concession: Australia's Response to China's Trade Coercion, 2020–2024

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Abstract

In April 2020, Australia's public call for an independent investigation into COVID-19's origins prompted Beijing to launch its most comprehensive campaign of economic coercion against a developed economy in recent years. Through a mix of formal trade remedies and informal import restrictions, China targeted key Australian exports—barley, wine, coal, seafood, timber—while avoiding iron ore. Drawing on WTO filings, trade statistics, and official statements, this case study reconstructs the sequence, logic, and outcomes of the coercion, highlighting sectoral economic damage, political resilience, and implications for allied strategies against state-led trade coercion.

Keywords: economic coercion, trade restrictions, export diversification, geoeconomics, WTO dispute settlement, COVID-19 inquiry, China, Australia
JEL Classification: F13, F51, F52, Q17, O24

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1. Strategic Context

By 2019, the People's Republic of China (PRC) accounted for roughly one-third of Australia's total goods exports, creating a pronounced asymmetry in bilateral trade dependence (Department of Foreign Affairs and Trade (A) 2025; World Bank 2019). This was underpinned by iron ore, which Beijing could not easily substitute, but also by significant flows of coal, barley, beef, wine, cotton, timber, and seafood (Uren 2020). China was also Australia's largest agricultural export destination, representing 28 percent of all agricultural exports, and absorbing 70 percent of Australian cotton production. At the same time, bilateral investment was cooling—overall Chinese investment in Australia plunged 62 percent in 2020 compared with 2019, reaching a six-year low (Chinese Investment in Australia Database 2025).

The trigger came in April 2020, when Foreign Minister Marise Payne publicly called for an independent inquiry into the origins of COVID-19, defended by then Prime Minister Scott Morrison (Kelly 2020). Beijing swiftly rejected the proposal as "political manipulation" and, within weeks, initiated a campaign of sector-specific trade restrictions (PRC Ministry of Foreign Affairs 2020). These included formal anti-dumping and countervailing duties and a series of informal, opaque regulatory measures.

The campaign's execution involved multiple Chinese actors—including the Ministry of Commerce (MOFCOM), the General Administration of Customs (GACC), and state-owned enterprises (SOEs), operating under a calibrated strategy: target products with low Chinese dependence but high Australian dependence, while sparing commodities where Beijing's own costs would be prohibitive (Edmonstone 2024).[1] Canberra, in turn, adopted a measured response—eschewing tit-for-tat retaliation, pursuing WTO litigation, and accelerating export market diversification.

2. Timeline of Events

The Australia–China trade dispute unfolded over nearly four years, beginning in April 2020 after Canberra's call for an independent inquiry into the origins of COVID-19. Within weeks, Beijing initiated a series of targeted trade actions—tariffs, import bans, and informal restrictions—affecting key Australian exports from barley and wine to coal and lobsters. These measures were often justified on technical or sanitary grounds but coincided closely with political flashpoints in the bilateral relationship. Throughout 2020 and 2021, restrictions expanded in scope and

[1] Robert O. Keohane and Joseph S. Nye, *Power and Interdependence*, 4th ed. (New York: Longman, 2011), 10–13. Keohane and Nye define asymmetric interdependence as a structural condition in which one actor is more vulnerable to the disruption of economic ties than the other, creating leverage for coercion

duration, prompting Australia to seek remedies through the World Trade Organization (World Trade Organization 2021). A gradual easing began in 2022, culminating in 2023–24 with the removal of most barriers, including those on coal, barley, wine, beef, and lobster (Hoyle 2024). This sequence of escalation, endurance, and eventual partial resolution illustrates both the durability of Chinese trade coercion and the protracted nature of its unwinding.

TABLE 1. Actor Table

Actor Name	Actor Type	Role	Position / Action Taken
Government of China (PRC)	State	Initiator	Directed and coordinated a multi-sector trade coercion campaign; publicly denied coercive intent, framing measures as regulatory enforcement.
China's Ministry of Commerce	State agency	Trade remedy authority	Imposed 80.5% combined anti-dumping and countervailing duties on barley; launched and later finalized anti-dumping investigation on wine with tariffs up to 212%.
Chinese Customs and Quarantine agencies	State agency	Customs and biosecurity enforcement	Suspended beef imports from specific abattoirs; halted log imports over pest claims; delayed seafood clearance; intensified inspections of wine shipments.
Chinese State-Owned Enterprises	State, state-linked enterprises	Market implementers	Issued administrative guidance to halt Australian coal purchases; shifted procurement to alternative suppliers.
Government of Australia	State	Target	Maintained policy stance on COVID-19 inquiry; launched WTO disputes; provided support to affected exporters; expanded trade diversification.
Australian export industries (barley, wine, coal, seafood, timber)	Private sector	Targets	Faced sharp revenue losses; sought alternative markets with varying success.

Note: The table identifies principal actors relevant to the case study and is not intended as an exhaustive mapping of all governmental, regulatory, commercial, or sectoral actors involved. Actor roles are analytical classifications used to clarify the coercion campaign, Australia's response, and affected sectors.

Source: Author's compilation based on cited official statements, WTO materials, trade data, and secondary sources.

TABLE 2. Timeline Table

Date	Actor	Action/Response	Source(s)
April 19, 2020	Australian Government	PM Scott Morrison calls for inquiry into COVID-19 origins.	Needham and Duran (2020)
April 26, 2020	PRC Embassy in Australia	PRC Ambassador warns of boycotts of Australian goods and tourism.	Needham and Duran (2020)
May 12, 2020	General Administration of Customs of China (GACC)	Suspends imports from four Australian beef processors, citing labeling/contamination issues.	Edmonstone (2024)
May 18, 2020	Ministry of Commerce (MOFCOM)	Imposes 80.5% anti-dumping and countervailing duties on Australian barley (~AUD 1 billion market).	GIWA (2020), Sullivan (2020)
August 17, 2020	MOFCOM	Launches anti-dumping investigation into Australian wine.	Jasper (2023) Yu and Kaye (2020)
October 2020	National Development and Reform Commission (NDRC) / State-Owned Enterprises (SOEs)	Implements unofficial coal import ban; SOEs instructed to halt purchases, vessels stranded offshore.	Fillingham (2023)
November 18, 2020	Chinese Embassy in Canberra	Chinese Embassy leaks '14 grievances' with Australia.	DFAT (D)
November 27, 2020	MOFCOM	Imposes wine tariffs up to 212%, effectively closing the market.	Wine Australia (2025) Jasper (2023)
November 2020	GACC / MOFCOM	Expands informal bans to lobsters, timber, cotton, sugar; customs delays and rejections.	Edmonstone (2024)
December 14, 2020	NDRC / SOEs	Formalizes coal import restrictions; increases sourcing from Russia, Mongolia, Indonesia.	Karp (2020)
December 16, 2020	Australian Government	Lodges DS598 in WTO to protest anti-dumping duties on barley.	World Trade Organization (2021) (A)

TABLE 2. *Continued*

Date	Actor	Action/Response	Source(s)
June 21, 2021	Australian Government	Requests WTO dispute consultants and panel on Chinese wine tariffs; barley case already filed.	World Trade Organization (2024) (B) DFAT (C) Edmonstone (2024)
February 8, 2023	NDRC / SOEs	Resumes coal imports; first shipment in over two years arrives in Zhanjiang.	Raj (2023)
April 10, 2023	Australian Government	Suspends appeal to WTO.	Dziedzic (2023)
August 2023	MOFCOM	Removes barley tariffs following review.	Sullivan (2023)
November 4, 2023	PM Albanese and President Xi	Prime Minister Albanese and President Xi meet in China.	Murphy (2023)
March 29, 2024	MOFCOM / Australian Government (DFAT)	Wine tariffs lifted; Australia drops WTO complaint.	World Trade Organization (2024) Edmonstone (2024)
December 10, 2024	GACC / MOFCOM	Lifts lobster ban and most beef restrictions.	Hoyle (2024)

Note: The timeline highlights major public events, trade measures, legal steps, and diplomatic developments relevant to the case study. It is not intended to capture every related statement, regulatory action, customs decision, or sector-specific development. Dates refer to the announcement, reported implementation, formal procedural step, or public reporting of each event, as applicable.
Source: Author's compilation based on the sources cited in this article.

3. Instruments and Mechanisms

The PRC's coercion campaign against Australia employed a dual-track approach, combining formal trade remedies with informal regulatory measures and strategic signalling. This structure allowed Beijing to exert targeted economic pressure while maintaining plausible deniability and limiting the risk of losing at the WTO. On the formal track, China's Ministry of Commerce (MOFCOM) imposed anti-dumping and countervailing duties on Australian barley and wine. In May 2020, combined duties of 80.5% were applied to barley for five years, following an investigation launched in 2018 that cited alleged subsidies and dumping (Australia Minister for Foreign Affairs 2023). Later, beginning in November 2020, provisional wine duties ranging from 107% to 212% were imposed and subsequently confirmed as definitive measures in March 2021 for the same duration (Wine Australia 2025). These measures were formally notified to the WTO, enabling Australia to initiate disputes (World Trade Organization 2020). While such formal channels offered avenues for legal challenge, they also allowed Beijing to frame its actions domestically as lawful responses to "unfair trade practices." Informal regulatory measures, however, were the primary source of disruption and were often opaque in implementation. These included suspensions of specific beef exporters over alleged labelling and certification issues, delays and rejections of seafood and timber imports on pest and safety grounds, and informal bans on coal enforced via state-owned enterprise procurement shifts and port clearance slowdowns. From October 2020, industry reports noted a wider "blacklist" of commodities—including copper ore and sugar—facing unexplained clearance delays (Fillingham 2023). These actions were typically enforced at the port or company level, allowing Chinese authorities to deny direct political involvement and complicating legal recourse.

TABLE 3. Instrument Table

Instrument Type	Formal/Informal	Implementing PRC Actor(s)	Targeted Sector(s)	Stated Basis
Anti-dumping duty (barley)	Formal	MOFCOM	Barley	Dumping and subsidies
Countervailing duty (barley)	Formal	MOFCOM	Barley	Subsidies
Anti-dumping duty (wine)	Formal	MOFCOM	Wine	Dumping
Abattoir suspensions	Formal	GACC	Beef	Labelling/health
Customs delays/pest claims	Informal	GACC	Timber, seafood	Pest contamination
SOE procurement guidance	Informal	State-Owned/ Affiliated Enterprises	Coal	N/A

Note: The table summarizes selected instruments discussed in the case study for analytical clarity. Formal/informal classifications reflect the apparent mode of implementation based on the evidence reviewed. "N/A" indicates that no formal stated basis was identified.

Source: Author's compilation and analysis based on sources cited in this work.

4. Responses and Outcomes

Australia's response to Beijing's coercion campaign was measured, strategic, and consistent with its self-presentation as a principled advocate of the rules-based trading system.[2] Rather than resorting to reciprocal trade sanctions—which might have risked further escalation or undermined Canberra's WTO claims—the Morrison government pursued a two-pronged strategy: litigation and diversification. Two formal disputes were launched at the WTO: DS598 in December 2020, challenging the barley duties, and DS602 in June 2021 contesting the wine tariffs (World Trade Organization 2021; and World Trade Organization 2024). These cases aimed not only to seek legal redress but also to publicly frame the PRC's actions as violations of global trade norms. Market diversification became the second pillar of Australia's strategy. Trade promotion agencies and industry bodies worked intensively to redirect exports toward alternative destinations. Barley, once over 50 percent dependent on the Chinese market, found partial refuge in Saudi Arabia and Southeast Asia, albeit at lower margins (Department of Agriculture, Water, and the Environment 2021). Similarly, wine producers sought to rebrand and reposition in markets such as the UK, the United States, and parts of Southeast Asia (Jasper 2023). The government accelerated negotiations for free trade agreements with the EU, UK, and India, both to expand market access and to signal that Australia would not be cowed into economic dependence.

The economic consequences were severe but uneven across sectors. High-exposure industries such as barley, wine, and rock lobster experienced sharp declines in revenue. Barley growers, for instance, faced an 80% tariff that left them earning over AUD 30 less per ton, while wine exports collapsed to less than 1% of pre-tariff volumes, inflicting losses of up to AUD 1 billion (Hough 2021). Rock lobster fishers, who previously sent more than 90% of their catch to China, saw their market effectively disappear. For many firms, even after finding new buyers, pre-coercion profitability could not be restored (Brann 2021; Wine Australia 2025; Mercer 2021).[3] In contrast, while the ban on coal imports initially caused nearly AUD 1 billion in losses, the longer-term impact was even starker: exports to China dropped from 77.5 million tons in 2020 to just 2.86 million tons in 2022, a fall of more than 95%. Exporters later redirected shipments to India, Japan, and South Korea, recovering some volumes at reduced prices (Turner-Cohen 2021; Reuters 2024). Beef and timber exports suffered significant disruption, but alternative markets mitigated the worst effects (O'Connor 2020). At the macroeconomic level, the impact was buffered by soaring iron ore prices and volumes in 2020–2021, which helped sustain Australia's overall trade surplus despite targeted losses in other sectors.

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[2] Wesley, Michael. "Australia and the Rise of Geoeconomics." (2016). Wesley discusses how middle powers like Australia can adopt a long-term strategic posture, prioritizing resilience and diversification over short-term concessions when facing economic coercion.

[3] The losses as a result of the wine imports were estimated at nearly a billion dollars, with billions of bottles of wine sales and production affected in the long-term. Prior to the bans, the Chinese wine trade was worth over 1.25 billion a year to Australia and made up 41% of Australian total wine exports.

Politically, the coercion campaign hardened domestic resolve. Public trust in China fell to record lows (from 52% to less than 20%) according to Lowy Institute polling, and a rare bipartisan consensus emerged on the need to resist economic pressure (Kassam 2021).[4] Notably, Canberra made no policy concessions on the COVID-19 inquiry or the broader set of "14 grievances" issued by the PRC embassy in November 2020. Instead, the episode reinforced Australia's strategic identity as a resilient middle power willing to bear short-term costs to preserve sovereignty and policy autonomy.

5. Wider Analytical Insights

The Australia case illustrates both the potency and the limits of Beijing's economic coercion when applied against a resilient, resource-rich democracy with diversified global trade links. From a coercer's perspective, the campaign was designed with precision: targeted sectors were chosen for their political sensitivity and high Australian dependence on the Chinese market, while Beijing's own vulnerability was minimized by avoiding critical commodities like iron ore. This targeting logic mirrors patterns seen in earlier coercion cases—such as the 2010 rare earths suspension to Japan and the 2017 tourism restrictions to South Korea—where Beijing sought to concentrate costs on politically salient industries without inviting broad domestic backlash (Lim 2019).

What differentiates the Australia episode is the scope and multi-sectoral breadth of the measures. While most previous instances of PRC coercion involved one or two main commodities or service categories, this campaign spanned agricultural products, resources, and even people-to-people sectors like education and tourism. Such breadth amplified the economic pain and signalled Beijing's willingness to mobilize the full toolkit of state, quasi-state, and regulatory actors in a coordinated fashion. Yet, breadth did not translate into policy concession.

The failure to achieve political compliance is partly explained by Australia's structural resilience. The economy's heavy reliance on iron ore, immune to restriction due to China's lack of alternative suppliers, provided a financial cushion. Simultaneously, strong institutions, a robust political consensus on the China challenge, and active alliance diplomacy reduced the susceptibility to coercive leverage. Unlike smaller states that have altered policies in response to PRC pressure—such as the Philippines' 2012 approach to the South China Sea arbitration—Australia treated the measures as a long-term strategic challenge rather

[4] John E. Mueller, "Presidential Popularity from Truman to Johnson," *American Political Science Review* 64, no. 1 (1970): 18–34, at 21. Mueller first conceptualized the "rally-round-the-flag" effect, in which external threats or crises can temporarily increase domestic unity and public support for leaders resisting foreign pressure

than a transactional dispute (USCC 2016). Another notable feature of the case is the interplay between formal and informal measures. Formal WTO-notified trade remedies offered Beijing a veneer of legality and an opportunity to frame the dispute as purely commercial. Informal actions—customs slowdowns, quarantine bans, and state-owned enterprise procurement guidance—were harder to challenge in multilateral forums, but their political intent was transparent to the targeted sectors. This dual-track strategy reflects an evolved PRC coercion model that maximizes deniability while maintaining flexibility to de-escalate.

TABLE 4. Impact Table

Impact Area	Targeted Actor / Sector	Observed Impact	Source
Barley	Growers/exporters	The 80% tariff from China resulted in increased sales to Saudi Arabia. This still meant farmers were getting over AUD 30 less per ton.[5]	Brann (2021)
Wine	Winemakers	Export collapse to <1% of pre-tariff volumes; large domestic oversupply; long-term brand shift needed. Losses of up to AUD 1 billion.	Wine Australia (2025)
Coal	Miners/ports	Coal exports to China fell from 77.5 million tons in 2020 to 2.86 million tons in 2022, a drop of over 95%. Losses were mitigated by demand from India, Japan, and South Korea.	Reuters (2024)
Beef	Abattoirs	Disruption from abattoir suspensions; some reallocation to Japan/US markets.	Australian Bureau of Statistics (2025)
Rock lobster	Fishers	Previously, Australia exported more than 90% of their lobsters to China; the market was effectively halted after the restrictions.	Mercer (2021)
Timber	Forestry exporters	Bans citing pest contamination stranded shipments; alternative markets limited. Shipments fell by 38% globally.	Wood Resources International (2020) Needham (2020)
Education	Universities, operators	PRC advisories dampened perceptions; COVID-19 border closures muted immediate effect; many universities estimated losses of up to AUD 400 million.	(McGregor, 2022)

Note: The table summarizes selected reported sectoral impacts discussed in the case study.

Source: Author's compilation based on sources cited in the table and manuscript.

[5] About 10% of its normal pre-tariff value.

However, this case also underscores that economic damage is real, even if coercion fails politically. For some sectors—especially wine and rock lobster—the loss of the Chinese market remains structural, with limited short-term prospects of full recovery. This raises important policy questions about how to design export strategies that avoid excessive concentration risk, even in times of strong bilateral relations.

Overall, China's coercion against Australia following the COVID-19 inquiry announcement stands as a high-water mark in both the ambition and the visibility of China's economic statecraft. It demonstrates that while Beijing's tools can inflict significant costs, their ability to compel durable policy change is far from guaranteed when used against a politically cohesive, economically adaptable, and diplomatically networked target. Yet the case also raises forward-looking policy questions: how should middle powers manage trade exposure to avoid concentration risks that leave them vulnerable to coercion? What reforms or innovations in multilateral institutions like the WTO are needed to address measures that blur the line between formal and informal restrictions? And to what extent can collective frameworks among liberal democracies help deter coercion by ensuring that costs are borne more heavily by the coercer than the coerced? These questions point to the broader challenge of designing sustainable resilience in an era where economic statecraft is likely to become more—not less—central to international politics.

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