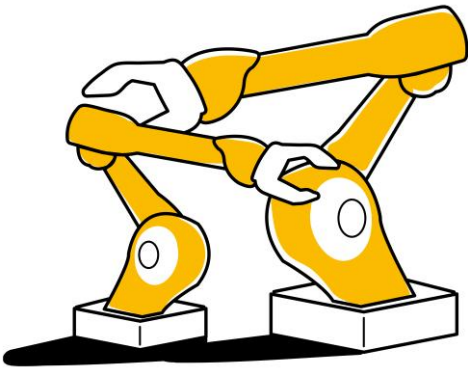


AUGUST 27, 2026 (REPORTING PERIOD: APRIL 28 – AUGUST 10)

MERICS

China Industries



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MERICS TOP 5

1. Beijing tells provinces to find uses for humanoid robots

At a glance: The Ministry of Industry and Information Technology (MIIT) and the State-owned Assets Supervision and Administration Commission (SASAC) launched a program to develop real-world use cases for humanoid robots and other embodied-intelligence products. The program:

- Requires 10 selected provincial-level regions to identify at least 20 training scenarios across their industrial operations, commercial and public services and hazardous or emergency-response work
- Aims to bring together workplace operators, robot manufacturers, software and component suppliers and research institutes to collect robot data and develop task-specific capabilities in real operating environments
- Relies on the commissioned workplace operators or evaluators to assess task success, productivity, reliability, safety and economic viability before provincial authorities and central SOEs promote successful solutions more widely
- Aims to establish more than 100 application scenarios with the potential to deploy tens of thousands of humanoid robots by the end of 2026

MERICS comment: [Unitree's blockbuster IPO](#) demonstrates the investor enthusiasm around China's humanoid-robotics sector. Several other robot manufacturers are also expected to conduct listings. Yet there are still few commercially viable applications for humanoid robots. Workplace operators have little incentive to bear the cost of experimenting with a technology that may fail to outperform simpler forms of automation or human labour. Existing training centres, backed jointly by local governments and robot manufacturers, use purpose-built replicas of workplaces to generate data, but cannot fully reproduce the variability of real operating environments.

This new program mobilises local authorities and central SOEs to organise training in actual work environments and support early deployments through their own funding mechanisms. This could generate more representative operating data and provide manufacturers with early revenue. It would still not demonstrate organic demand. The notice sets a November 30 deadline for results, which will limit the amount of new experimentation this program can generate. However, further experiments may nevertheless enable operators to find more routine deployments for some applications.

Given the absence of proven commercial applications so far, European firms may get second-mover advantage by observing the Chinese experiments for durable applications before deploying humanoids. However, Chinese robot-makers are already producing at scale, so [European companies](#) have catching up to do.

Article: Notice on jointly launching the 2026 special action for real-world training of humanoid robots and embodied intelligence (工业和信息化部办公厅 国务院国资委办公厅关于联合开展 2026 年度人形机器人与具身智能实景实训专项行动的通知) ([Link](#))

Issuing bodies: MIIT, SASAC

Date: June 8, 2026

2. China's industrial decarbonization drive is a boon for green exports

At a glance: The MIIT released the 15th Five-Year Plan for Green and Low-Carbon Industrial Development. The plan aims to extend the green value chain throughout the industrial sector by:

- Deploying green energy through a greener energy system and grid support, such as green microgrids and direct green power supply, and by enforcing recycling and re-use of power batteries, solar panels and wind turbines and blades
- Upgrading the industrial chain by greening traditional industries, expanding green industries, such as new energy vehicles (NEVs) and new energy equipment and storage and by cultivating emerging industries like green hydrogen
- Building zero-carbon infrastructure. The Plan introduces a target of 500 zero-carbon factories by 2030, up from zero in 2025, and encourages building zero-carbon computing centers to create replicable and scalable models of green energy use

MERICS comment: China is doubling down on achieving the first of its dual carbon goals: peaking carbon emissions by 2030. Industry is one of its highest-emitting sectors, so greening across the entire value chain could have a significant impact. An MIIT official [explained](#) the whole value chain approach as an intention to simultaneously upgrade current industries, making them greener, and to pursue green industrialization in new low-carbon sectors, thereby supporting China's broader decarbonization and green transition.

This decarbonization playbook will include familiar tools, notably enhanced monitoring mechanisms and more support for research and applications of green tech. Energy efficiency and carbon emissions monitoring will get particularly emphasized in carbon-intensive sectors such as steel, non-ferrous metals, petrochemical, construction, solar modules and computing infrastructure. Carbon footprint calculation standards for industrial products are to be established. Green tech research will focus on industrial applications, for instance in zero-carbon factories, paying greatest attention to emerging technologies in electrolysis and renewable hydrogen production, solar cells and batteries.

For Europe, Beijing's green push across the industrial value chain will make Chinese exports more competitive and compliant with the EU's Carbon Border Adjustment Mechanism (CBAM) and battery requirements. CBAM is intended to prevent carbon leakage by imposing a tariff on carbon-intensive imports to offset any disadvantage to domestic producers. The EU [Battery Passport](#), effective February 2027, requires greater transparency on the product's lifecycle, and reuse and recycling information. China's industrial decarbonization strategy is [poised](#) to meet these requirements, bolstering Chinese competitors' foothold in the EU market.

Article: 15th Five-Year Plan for Green and Low-Carbon Industrial Development (工业和信息化部关于印发《工业绿色低碳发展“十五五”规划》的通知) ([Link](#))

Issuing body: MIIT

Date: July 31, 2026

3. The MIIT seeks to fuse the digital and real economy via online platforms

At a glance: The MIIT and six other departments issued an action plan to boost the development of and collaboration between small, middle, and large companies via the platform economy, more deeply fusing the digital and real economy. The plan for the period 2026-2028 seeks to:

- Create collaborative innovation models on online platforms that help connect companies of various sizes
- Increase openness and the sharing of technology and data, e.g. through releasing platform resource-sharing lists and selecting at least 100 pilot projects for platform resource-sharing scenarios
- Encourage platforms to leverage their market strength, technology, and computing power to support small and medium-sized enterprises (SMEs) to expand internationally

MERICS comment: The action plan reflects the Chinese government's role as a 'matchmaker' for the economy. The idea is that integrating supply and value chains more closely will produce efficiency gains and raise China's global competitiveness. Similarly, previous efforts were focused on building links between [small and large companies](#) and between [industrial companies and industrial software firms](#). The current policy largely maintains this business-to-business (B2B) approach. By treating online platforms as the glue that binds industrial actors together, it uses them to link innovative SMEs (which would otherwise lack resources to promote their products widely) with demand from larger producers downstream. This reflects Beijing's belief that demand-supply mismatches often result from a lack of suitable products or insufficient knowledge about them.

Although heavily focused on B2B, the policy could also improve some business-to-consumer (B2C) relationships. By helping smaller companies increase their visibility and reach, online platforms could help unlock latent consumer demand for China-based producers, both in China and abroad. Moreover, [online platforms](#) are expected to offer 'one-stop' services to SMEs venturing abroad, including advice on tax, legal, and intellectual property issues. This could lower their compliance costs and risks in foreign markets. The policy may eventually exacerbate Europe's challenges in dealing with a wave of low-cost Chinese e-commerce exports. It could also raise competition for European goods in third markets, as European companies may lack the kind of comprehensive support system Chinese online platforms are supposed to provide to Chinese firms.

Article: Action Plan for Promoting the Coordinated Development of Large, Medium, and Small Enterprises in the Platform Economy (2026–2028) (工业和信息化部等七部门关于印发《促进平台经济大中小企业协同发展行动方案（2026—2028年）》的通知)

([Link](#))

Issuing bodies: MIIT, CAC, NDRC, MOST, MOFCOM, SAMR, NDB

Date: June 18, 2026

4. China wants to transform agriculture through technology

At a glance: The State Council released the "15th Five-Year Plan for Accelerating Agricultural and Rural Modernization." It promotes technology-driven, green and quality-focused agriculture to modernize farming practices and boost domestic food supply. Key goals to reach by 2030 are:

- Raise grain production capacity to approximately 1.45 trillion jin (725 million tonnes), up from 1.39 trillion jin in 2025
- Boost the value-added of agriculture and related industries to CNY 25.8 trillion (EUR 3.3 trillion), up from CNY 20.6 trillion (EUR 2.6 trillion) in 2024, improving quality, efficiency, and competitiveness
- Increase the contribution rate of agriculture sci-tech progress to 67 percent of agricultural output growth, up from 64 percent in 2025

MERICS comment: Agriculture is now positioned as a strategic security sector within the 15th FYP (2026-2030), whereas it was a development priority in the [14th FYP](#) (2012-2025). The new plan pursues a dual strategy for agriculture: boost domestic production with new technologies, while simultaneously building internationally competitive agribusinesses that can hold their own in global markets.

The urgency is rooted in deep structural constraints. Arable land is declining. Water is scarce. Rapid urbanization has consumed high-quality farmland in the country's east and south. The leadership's response is a major bet on agricultural science and technology, focusing on enhancing innovation, promoting AI applications and developing smart agriculture. One example might be by selecting typical application scenarios for [agricultural robots](#). This fits into the broader trajectory of integrating robotics with AI, the Internet of Things (IoT), and advanced agronomy. The aims are to reduce manual labor, increase precision and make agricultural practices more efficient. However, most farms are small and run by aging operators who lack the capital, skills, or scale to adopt such high-tech solutions.

For European agri-food exporters, the implications are mixed. On the one hand, China's push for agricultural self-sufficiency is likely to bring competition risks for EU producers. It remains uncertain whether China will become a food exporter. But it is undoubtedly pushing to become a more competitive producer and a more selective buyer. European firms may see Chinese demand gradually drying up for products they have long supplied. The risk of Chinese exports flooding their markets is far lower. However, European companies supplying agricultural technology, machinery, or high-value specialty products that China cannot easily replicate at home could benefit from the modernization drive if it increases demand from Chinese agriculture customers.

Article: Notice of the State Council on Issuing the "15th Five-Year Plan for Accelerating Agricultural and Rural Modernization" (国务院关于印发《加快农业农村现代化“十五五”规划》的通知) ([Link](#))

Issuing body: State Council

Date: June 2, 2026

5. Beijing drives development and commercialization in future industries through its “unveiling the list” mechanism

At a glance: The MIIT and others have invited applications to “unveil the list”, a mechanism providing insights into areas where Beijing wants to build competitive advantages or address current weaknesses. The call targets six so-called “directions”, namely future industries, equipment manufacturing, information technology, communications, artificial intelligence (AI), and consumer goods. These directions span a total of 24 “topics”, divided into myriad sub-categories. Examples include:

- Humanoid robots, one of five “topics” for future industries, appear in 18 sub-categories, such as multimodal large models for embodied intelligence, swarm intelligence technology, and full-body motion control algorithms
- Green refrigeration equipment for the automotive industry, which belongs in “direction” equipment manufacturing, targets 11 sub-categories, such as high-efficiency compressors which can both cool and warm the vehicle
- Foundational technology, part of AI, consists of 14 sub-categories, such as agent memory management platforms

MERICS comment: The “unveiling the list” mechanism gives a glimpse into how the Chinese leadership’s priorities develop. For example, a [similar policy](#) on future industries from 2025 comprised atomic-level manufacturing (ALM), which [operates](#) at a smaller scale than nanomanufacturing and manipulates individual atoms. The current policy targets ALM as well, suggesting it remains relevant to policymakers. By contrast, the 2025 policy did not yet include humanoid robots, which were elevated when the 15th five-year plan (FYP) listed embodied intelligence as a future industry in March.

The policy’s numerous sub-categories and their emphasis on concrete use cases reflects China’s traditional tendency to prioritize development and commercialization over basic and applied research. This contrasts with many Western countries, which have long put more emphasis on research. In 2024, the United States spent around [one third of its R&D expenses on research](#), compared to only [19 percent](#) in China’s case. However, this situation may be starting to change. First, the [second Trump administration](#) has been hesitant to approve research proposals, dampening federal spending on research. Second, China is fast increasing R&D spending, with planned annual increases of seven percent during the 15th FYP. According to official sources, [basic research](#) was more than seven percent of total R&D spending for the first time in 2025.

Finally, the policy shows that China does not leave development and commercialization to chance. It is a reminder that the EU suffers from a ‘[commercialization gap](#)’, where R&D struggles to be turned into marketable products. The EU urgently needs to overcome this gap if it wants a shot at competing with China for the industries of the future.

Article: Notice on unveiling the list for Innovation Tasks in the Industrial and Information Technology Sectors for 2026 (工业和信息化部等七部门办公厅（办公室）关于开展 2026 年工业和信息化领域创新任务揭榜挂帅工作的通知) ([Link](#))

Issuing bodies: MIIT, MEM, PBOC, NFRA, CSRC, CAS, NCHA

Date: July 28, 2026

NOTEWORTHY

Policy news

- *May 18:* The MIIT published implementation measures for replacing capacity in the steel industry. They apply to projects involving new construction, reconstruction, or expansion of iron-making and steel-making smelting equipment by enterprises of all ownership types. In principle, the ratio of phased out capacity to new capacity should be at least 1.5:1. ([MIIT notice](#))
- *June 10:* The MIIT issued implementation opinions on the innovative development of artificial intelligence (AI) and information and communication technology (ICT) for the period 2026–2028. The goal is to make ICT operations work autonomously through AI and create 30 representative use cases by 2028. ([MIIT notice](#))
- *June 15:* The MIIT has announced a pilot project for an industrial 5G private network. This is a 5G network for enterprises that can operate independently of the public network. Intended advantages for participating firms include high-speed transmission, ultra-low latency, and high-precision positioning. ([MIIT notice](#))
- *June 18:* The Cyberspace Administration of China (CAC) released measures for network data security risk assessments, requiring data processors which handle important data in their industries to conduct assessments annually. The CAC's departments may inspect the accuracy of their risk assessment reports. ([CAC measures](#))
- *July 22:* The MIIT has invited manufacturing enterprises and computing power facilities to file applications for the status “national-level zero-carbon factories”. Successful applications must meet conditions on carbon emissions per unit of energy consumption, the proportion of non-fossil energy consumption and non-fossil energy electricity consumption. ([MIIT notice](#))
- *July 27:* The MIIT released guidelines for the 2026 edition of cultivating “small, fast, lightweight, and precise” digital products and services. The scheme aims to guide digital service providers to accommodate the digital transformation needs of SMEs in areas such as innovation, quality improvement, cost reduction, efficiency enhancement, green development and security. ([MIIT notice](#))
- *July 31:* The State Council published the 15th FYP for intellectual property protection and utilization. Goals include filing at least 22 high-value patents per 10,000 people, as well as having intellectual-property intensive industries make up 14.6 percent of GDP, and imports and exports of intellectual property gaining CNY 2 trillion in royalties. ([State Council notice](#))
- *August 3:* The MIIT issued a notice on recommending leading energy efficiency and carbon efficiency enterprises in key industries for 2026. Energy efficiency leaders are to be selected from many areas - such as crude oil processing or ethylene. The

category of carbon efficiency leaders focuses on electrolytic aluminum, cement clinker, synthetic ammonia, ethylene and methanol. ([MIIT notice](#))

Corporate news

- *May 7:* Moonshot AI, the Beijing-based developer of the Kimi series of open-weight large language models, has raised USD 2 billion in its latest funding round. The round was led by Long-Z Investments, which belongs to Chinese food delivery company Meituan. Other investors included Tsinghua Capital, China Mobile, and CPE Yuanfeng. Moonshot AI is valued at USD 20 billion. ([Techcrunch](#))
- *May 13:* Chinese EV-maker BYD is in talks with Netherlands-based auto-maker Stellantis about the possible takeover of underused factories in Europe, for example in Italy. BYD said it would like to operate such plants on its own rather than through joint ventures. ([Reuters](#))
- *May 22:* China's Semiconductor Manufacturing International Corporation (SMIC), the country's largest wafer foundry, has acquired the remaining 49 percent stake in Semiconductor Manufacturing North China Corporation (SMNC), making SMNC a wholly owned subsidiary. The transaction was valued at CNY 40.6 billion. ([SCMP](#))
- *June 26:* The EU has published updated rules on foreign direct investment screening in its official journal. The updated rules entered into force 20 days after publication in the journal. Changes include extending screening to EU-based investors that are ultimately controlled by a non-EU entity and mandatory screening of investments in sensitive and strategic areas such as dual-use items, critical technologies, critical raw materials, financial services, transport, energy and electoral infrastructure. ([EU Commission](#))
- *July 9:* The EU Commission has imposed anti-dumping duties on imports of passenger-car and light-lorry tires from China, with duties ranging from 4.3 percent to 45.3 percent. ([EU Commission](#))
- *July 23:* Chinese carmaker Geely has reached a deal with Ford to use the latter's idle production capacity in Spain. Under the agreed set up, Geely will hold a 34 percent stake and Ford 66 percent. The two companies will jointly build Ford-branded multi-energy vehicles and Geely-branded electric vehicles. ([SCMP](#))
- *July 27:* ChangXin Memory Technologies (CXMT), China's leading maker of dynamic random-access memory (DRAM) chips, concluded its IPO on Shanghai's Star Market. It reached a market capitalization of CNY 3.28 trillion, which made it China's most valuable onshore listing. ([SCMP](#))
- *August 19:* Unitree Robotics, the world's largest producer of humanoid robots, finished its stock market listing on the Shanghai-based Star Market. Unitree's share price jumped by 460 percent within the first day of trading, from CNY 150.8 to CNY 845. ([BBC News](#))

AUTHORS

Andreas Mischer
Analyst, MERICS

Sophia Pradels
Analyst, MERICS

EDITORS

Claudia Wessling
Director Communications
and Publications, MERICS

Mary Hennock
Freelance editor

For more information, please contact:
publications@merics.de

PUBLISHER

MERICS | Mercator Institute for China Studies
Alte Jakobstraße 85–86
10179 Berlin
Tel.: +49 30 3440 999 0
Mail: info@merics.de
www.merics.org