China's Next-Generation Exports: AI, Robotics and Innovative Medicines Emerge as New Growth Engines

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Robots, artificial intelligence and homegrown pharmaceuticals are overtaking electric vehicles, lithium batteries and solar cells as the fastest-growing categories in China's foreign trade.

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China's export portfolio is changing shape. A new generation of high-tech industries is now driving the country's foreign trade growth, and it looks nothing like the last one. Artificial intelligence, robotics and innovative medicines, now being called the "new 'new three,'" are gaining momentum as China's latest export engines, taking over from the electric vehicles, lithium batteries and solar cells that powered the previous wave.

Panda Paws, a channel known for breaking down Chinese trends for Western viewers, released a short video this week walking audiences through the "new 'new three'" in plain, digestible terms. Using quick on-screen facts, the video highlights the same throughline analysts are pointing to: China's export edge is moving from manufacturing scale to research and innovation.

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Analysts say this is more than a change in product mix. It reflects a real shift in the source of China's export competitiveness, away from manufacturing scale and cost efficiency and toward research-intensive, technology-driven industries. The earlier "new three" rewarded companies that could produce at scale and keep costs down. The new sectors run on a different logic entirely: sustained R&D, continuous technological iteration, and value that comes from innovation rather than from cheaper inputs.

AI Extends Its Global Reach

China's artificial intelligence industry is moving well past software sales alone. According to OpenRouter, a global AI model aggregation platform, Chinese large language models processed 36.11 trillion tokens in the third week of July 2026, a jump of more than 30% from the week before. That kept them in first place globally in weekly usage for a 12th straight week. Industry observers point out that AI exports now cover a much wider range of digital capabilities than that headline number suggests, including algorithm development, model deployment and AI agent applications, much of which never shows up in conventional trade statistics. Chinese AI technologies currently serve users in 141 countries and regions.

Robots Move From Showcase to Workplace

Chinese robotics is making the leap from demonstration technology to everyday industrial and service use. On factory floors, industrial robots can tighten a screw in five seconds, faster and more precisely than an experienced human worker. In the power sector, robots are now handling high-altitude transmission line repairs that used to require dangerous manual work. Service robots are getting smarter too. At exhibitions, they can understand spoken commands, navigate on their own and deliver items on request. In smart pharmacies, robots from different manufacturers are sharing the same AI platform to sort medicines together, which is paving the way for pharmacies that run unattended around the clock.

The trade numbers back this up. In the first half of 2026:

- Exports of cleaning robots and intelligent bionic robots reached 18.09 billion yuan (about $2.7 billion)
- Industrial robot exports totaled 6.29 billion yuan, up 18.6% year on year, reaching 141 countries and regions
- Surgical robot exports jumped 3.3 times over to 480 million yuan, and their export markets grew from 23 countries to 49

Innovative Medicines Gain International Recognition

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China's pharmaceutical innovation sector is reshaping the global competitive picture, too. Earlier this year, China became the first country to approve a selective orexin-2 receptor agonist for narcolepsy, a rare neurological disorder that causes excessive daytime sleepiness. Approval is now pending in the United States, Japan and the European Union.

In the first half of 2026, China's National Medical Products Administration cleared 38 Class 1 innovative drugs. Eleven of those were globally novel medicines built on new targets and new mechanisms of action, all developed independently by Chinese companies. That single-half total matches the number of comparably novel drugs approved in all of 2025, a year in which domestic companies accounted for less than half.

Overseas licensing has picked up just as fast. Licensing deals reached roughly $110 billion in the first half of the year, equal to about 80% of the total for all of 2025. Those agreements cover 10 therapeutic areas, including oncology, metabolism, immunology and neuroscience, with buyers from 20 countries and regions, among them the United States, the United Kingdom, France and Italy. China now accounts for about 30% of the world's innovative drugs currently in development, second only to the United States.

Coordinated Policy Support Behind the Shift

Peng Yazhe, a digital economy researcher at the China Galaxy Securities New Development Research Institute, told 21st Century Business Herald that the earlier "new three" were built on manufacturing fundamentals, where scale and cost control decided who won. The new sectors, he said, follow "a completely different industrial logic," one built on knowledge and technology rather than production volume.

Zhu Keli, founder and dean of the China Institute of New Economy and chief expert on the intelligent economy, credited coordinated national policy for much of the momentum, pointing to the national "AI Plus" action plan along with dedicated support for robotics and the digital transformation of the pharmaceutical sector. In his view, all three industries have moved past simply exporting products. Now they're exporting technology systems, clinical solutions and industrial operating models, which he called a clear sign of China's growing strength in frontier technology.

From Manufacturing Powerhouse to Innovation Economy

Decades ago, Chinese exports of clothing, furniture and household appliances showed off the country's manufacturing capacity. Today, AI, robotics and innovative medicines show something different: the ability to export not just products, but technology, know-how and

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solutions to problems that matter well beyond China's borders. As the "new 'new three'" pick up speed worldwide, they point to a bigger story already in motion, China's shift from a manufacturing powerhouse to an innovation-driven economy.

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