BUSINESS

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Shanghai Gigafactory key to Tesla's global drive

By REN QI
renqi@chinadaily.com.cn



Potential carbuyers look at a Tesla model at a Tesla store in Shijiazhuang, Hebei province.
TANG KE / FOR CHINA DAILY

The gigafactory in Shanghai is playing an increasingly important role in Tesla's global production and export network, with its product localization rate now exceeding 95 percent, said Grace Tao, vice-president of Tesla.

"Tesla's achievements in China were created together with over 400 Chinese suppliers, more than 60 of which have entered our global supply chain," Tao said, highlighting the robust manufacturing ecosystem bolstering the facility.

This growing significance is underscored by the company's recent sales performance. According to data released last Friday by the China Passenger Car Association, Tesla's domestic sales in China exceeded 56,000 units in March, marking a 47 percent month-on-month increase, with the Model Y securing the top spot in domestic passenger car sales.

The Shanghai Gigafactory delivered over 85,600 electric vehicles in March, an 8.7 percent increase year-on-year. In the first quarter, cumulative deliveries reached 213,000 units, representing a 23.5 percent growth compared to the same period last year.

Serving as Tesla's largest global export hub, the Shanghai facility exported more than 29,000 vehicles in March. The China-led, designed and manufactured Model Y L — a large six-seat luxury SUV — is currently being rolled out across multiple Asia-Pacific markets, sparking a wave of orders. According to industry tracker Focus2Move, the Model Y was the world's best-selling passenger car in 2025 for the third consecutive year, with cumulative sales surpassing 4 million units.

Tesla also demonstrated strong global growth last month. In Australia, the Model Y topped the list of best-selling battery electric vehicles.

In South Korea, Tesla's monthly sales broke the 11,000-unit mark, making it the first imported brand to exceed 10,000 monthly sales and boosting its first-quarter local sales by 335 percent year-on-year. European markets saw similar surges, with March new car registrations jumping 203 percent in France and 315 percent in Germany.

The robust market performance is backed by stringent safety standards.

Multiple Tesla models have earned five-star safety ratings from global authorities including the NHTSA and Euro NCAP. Tao said the quality inspection team regularly conducts inspections to thoroughly check connection strength and durability. For the Model Y, nearly 3,000 welding spots and over 400 glue sections are meticulously inspected.

Building on this durable hardware, Tesla's over-the-air (OTA) software updates keep the vehicles constantly refreshed, having completed 58 updates between 2022 and 2025. This long-term product viability is reflected in the second-hand market, where the Model X, Model 3 and Model Y have dominated the top three spots for three-year-old pure EV resale value for two consecutive months.

In terms of infrastructure, Tesla's energy storage deployment reached 8.8 gigawatt-hours in the first quarter. The global Supercharger network produced 1.8 terawatt-hours of electricity during the same period, up 22 percent year-on-year.

As of March, Tesla operated over 80,000 Superchargers globally. In the Chinese mainland, the company has opened more than 2,500 Supercharger stations, covering all provincial capitals and municipalities, with over 950 stations now open to non-Tesla brands. By March 2026, Tesla had also established 588 direct stores across 119 Chinese cities.

"We have always attached great importance to the Chinese market, which not only is one of the most important new energy vehicle markets globally, but also boasts an open market environment, a complete supply chain system and a rich reserve of high-quality talent," Tao said, adding that China's NEV global market share reached 68.4 percent in 2025.

"Tesla is not just an electric vehicle company, but a technology enterprise centered on AI, robotics and energy. In the future, we will introduce more of Tesla's smart products and technologies to China to build a world of amazing abundance," Tao added.

Exports of China's power generators up

Manufacturers capitalize on surging demand for computing infrastructure

By ZHONG NAN
zhongnan@chinadaily.com.cn

China's exports of power generators jumped sharply as manufacturers capitalized on surging global demand for computing infrastructure, with high-capacity diesel units driving growth to support energy-intensive data centers, exporters and market watchers said.

The country's exports of power generator units rose 49.66 percent year-on-year to 12.9 billion yuan ($1.89 billion) in the first two months of 2026, with exports of high-capacity diesel generator sets used in data centers surging 131.81 percent, data from the General Administration of Customs showed.

Cheng Xiaosong, chairman of the electrical and mechanical products unit of State-owned SUMEC Group Corp in Nanjing, Jiangsu province, said the company's export orders have risen by more than 50 percent year-on-year so far this year. Orders from Germany have more than doubled, while demand from Southeast Asia has also grown strongly.

"These products are mainly used in energy-intensive applications that require highly reliable and uninterrupted power supply, reflecting rapid growth in global computing demand," Cheng said, adding that demand for high-capacity, stable generator sets has driven a surge in the company's exports.

Amid rapid growth in the global computing power market, Chinese companies are stepping up research and development, accelerating product upgrades and rolling out higher-capacity generator sets designed to operate in more complex environments.

Around 600 kilometers away from Nanjing, workers at a workshop of a factory owned by Weichai Holding Group Co in Weifang, Shandong province, recently rolled out a new 4.2-megawatt generator, nearly doubling the capacity of mainstream models currently in the market.

The generator delivers the same output with a smaller carbon footprint, with a more integrated system and fewer auxiliary components, said Wu Yongqiang, an engineer at the group's research institute of large-bore engines.

The product has already been exported to the United States, Southeast Asia and Europe. Amid strong global demand for computing infrastructure, Weichai Holding Group has invested in developing higher-capacity and more intelligent systems.

"As product upgrades accelerate, we are tailoring designs to suit diverse overseas operating conditions," said Yang Zhihua, general manager of Weifang Ailite Mechanical and Electrical Equipment Manufacturing Co, another Weifang-based power generator manufacturer.

Yang said additional heating systems are needed in colder regions, while in markets such as Saudi Arabia and the United Arab Emirates, extreme heat can cause machines to shut down, requiring specific technical solutions to ensure stable operation.

Agg Power Technology (Fuzhou) Co Ltd, a power equipment manufacturer based in Fuzhou, Fujian province, exported more than 1,000 generator units in the first two months, with export value rising 63.21 percent year-on-year to 168 million yuan.

"Our diesel generator sets are widely used in data centers, large-scale mining operations, commercial complexes and hospitals. Since the start of this year, as infrastructure development in Southeast Asia has gathered pace, markets such as Malaysia and the Philippines have emerged as new growth drivers for our exports," said Zhu Shuhua, the company's president.

Fujian's exports of power generation equipment and related components rose 16.2 percent year-on-year to 1.81 billion yuan in the first two months, according to Fuzhou Customs.

Yao Chunde, a professor of mechanical engineering at Tianjin University, said China's power generation equipment is highly competitive globally, supported by a complete supply chain and faster delivery than many overseas peers.

He said that investment by several countries in data centers and artificial intelligence-related infrastructure will continue to underpin demand for high-capacity, reliable power solutions globally.

New rules on AI set to protect minors

China has issued new rules regulating providers of AI systems that simulate human personality traits, thinking patterns and communication styles in continuous emotional interactions with users, placing strict safeguards on content for minors.

The interim measures, jointly released by the Cyberspace Administration of China along with four other government departments, aim to balance technological innovation with safety and public interest.

Under the new regulations, such services cannot generate content for minors that could encourage unsafe behavior, trigger extreme emotional responses or promote harmful habits that may affect their physical or mental well-being.

The regulation bans AI systems from producing content that encourages self-harm or suicide, uses verbal abuse, or induces emotional dependency that could distort real-life social relationships.

Authorities further prohibit the use of emotional manipulation to induce users to make irrational decisions or to infringe upon their legitimate rights and interests.

The framework comes as human-like AI interaction tools expand rapidly in China, with applications emerging in cultural communication, childcare and elderly companionship.

The rules emphasize a "development with security" approach, combining encouragement of innovation with tiered supervision, with the aim of guiding the sector toward "healthy and responsible" growth.

The rules will take effect on July 15.

XINHUA - CHINA DAILY

Key wind power companies call to curb 'malicious' price competition

By ZHENG XIN
zhengxin@chinadaily.com.cn

Top executives from China's wind power sector have recently issued a joint call to curb "malicious" price competition, warning that below-cost bidding threatens the safety and sustainable development of the world's largest renewable energy market.

In a recently signed article, industry experts and company executives — including Qin Haiyan, secretary-general of the Chinese Wind Energy Association and chairman of wind turbine giant Goldwind Science and Technology Co Ltd — urged firms to reject "involution" and called for an immediate return to rational market behavior.

The article stressed that the industry must unify its understanding to prevent "anti-involution" efforts from being derailed by short-term interests.

They called for a unified front to defend China's hard-earned global leadership in wind power, adding that rejecting below-cost bidding must be treated as an immutable "red line" rather than a choice.

Future competition should center on technological breakthroughs, quality and service, ensuring that value creation remains the primary driver of high-quality growth for the global green energy sector, they said.

The urgent plea for market rationality comes at a historic, yet highly pressured, milestone for the country's renewable energy sector.

> "The widespread rebound in bidding prices for wind turbines indicates that the industry has called a halt to price wars, and the campaign against 'involution' has achieved initial success."
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> **Qin Haiyan,** secretary-general of the Chinese Wind Energy Association and chairman of wind turbine giant Goldwind Science and Technology Co Ltd

The recently released Global Wind Turbine Market Shares 2025 report by industry consultancy BloombergNEF said Chinese turbine makers now occupy the top six positions in global market share rankings for the first time.

Cristian Dinca, wind associate at BloombergNEF and lead author of the report, attributed this to stable long-term policy support.

The National Energy Administration said China's investment in key energy projects surged to a record 3.5 trillion yuan ($505 billion) in 2025, with private capital remaining highly active.

The NEA reported that China's newly installed solar and wind power capacity exceeded 430 million kilowatts last year. This propelled the nation's cumulative grid-connected capacity of wind and solar power to 1.84 billion kW, surpassing thermal power for the first time in history.

China has also increased its national targets for wind power installations, aiming for 1.3 terawatts by 2030 and an ambitious 5 TW by 2060.

"China's wind power industry is transitioning from a policy-supported 'supplementary power source' to a market-driven 'primary power source', firmly cementing its position as a frontrunner in the global energy transition," said Qin.

"The widespread rebound in bidding prices for wind turbines indicates that the industry has called a halt to price wars, and the campaign against 'involution' has achieved initial success," he said.

Driven by both policy and innovation in 2025, China's newly installed wind capacity has doubled.

With continuous technological breakthroughs and increasingly diverse application scenarios, the sector has emerged as a new engine for high-quality economic and social development, Qin said, adding: "As the push against this cutthroat competition deepens, prices across all links of the industrial chain are expected to steadily recover, propelling the entire industry into a new era of high-quality development."

Peachy keen



A staff member (left) from Yuncheng North Station in Shanxi province recommends a train trip to Peach-Blossom Hill to a passenger, helping to bring the charms of the ancient city of Yuncheng to visitors. The station has set up a consultation desk in the waiting hall, aiming to improve services for cultural and tourist activities.
ZHANG XIN / FOR CHINA DAILY

Briefly

Yuan weakens against greenback

The central parity rate of the Chinese currency renminbi, or the yuan, weakened 3 pips to 6.8657 against the US dollar on Monday, according to the China Foreign Exchange Trade System. In China's spot foreign exchange market, the yuan is allowed to rise or fall by 2 percent from the central parity rate each trading day. The central parity rate of the yuan against the US dollar is based on a weighted average of prices offered by market makers before the opening of the interbank market each business day.

Canton Fair to see record exhibition scale

The 139th edition of the China Import and Export Fair, also known as the Canton Fair, is scheduled to take place from April 15 to May 5 in the southern Chinese city of Guangzhou, capital of Guangdong province, with its exhibition space, number of booths and participating enterprises all reaching record highs, the Ministry of Commerce said. The fair will cover 1.55 million square meters and feature 75,700 booths and more than 32,000 participating enterprises, with around 3,900 first-time exhibitors. The number of exhibition zones will increase to 179, including nine new sections covering smart wearables, display technologies, among others.

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