

China's IC exports surge 136% to US\$45bn in September

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China's integrated circuit (IC) exports surged 136 per cent year on year in September to US\$45 billion, exceeding the 108 per cent growth rate in the first nine months of the year in a sign of the country's rising influence in the global semiconductor supply chain.

In September, China exported 32.7 billion units of ICs, according to customs data released on Wednesday, a 1 per cent year-on-year increase in volume. But higher prices fuelled the 136 per cent jump in value amid a memory chip shortage stemming from the global building spree in artificial intelligence infrastructure.

The first three quarters as a whole saw exports of 275.2 billion IC units worth nearly US\$302 billion, according to the General Administration of Customs.

The growth in semiconductor exports far outpaced overall export growth from China, which rose 36.3 per cent year on year to US\$447.18 billion last month.

The data shows how Chinese chipmakers remain deeply entrenched in the global tech supply chain despite not producing the most advanced hardware given their limited access to top-of-the-line manufacturing equipment.

"The booming development of AI has accelerated global investment in computing power, expanding the demand for terminal equipment and intermediate manufacturing products," said Wang Jun, spokesman and vice-minister of the customs authority, in a news briefing on Wednesday.

The operation of massive computing facilities has simultaneously driven up global demand for electricity equipment, prompting a surge in Chinese power-related exports across generation, transmission and energy storage, he added.

Shipping containers are seen at a port in Qingdao, in eastern China's Shandong province, on September 28, 2026. Photo: AFP

Beyond chips, other hardware products also saw higher shipments. Exports of computer parts grew 2.1 times year on year during the nine-month period, exports of memory components like solid-state drives increased 1.3 times and exports of data-processing equipment – such as servers – rose by 7.2 per cent, Wang said.

Chinese-made AI glasses and robots are also continuously entering international markets as they "enrich global AI application scenarios", Wang said, without disclosing exact trade figures.

Meanwhile, semiconductor imports have also been growing quickly owing to China's heavy investment in digital and AI infrastructure. Memory imports grew 150 per cent year on year in the first nine months of the year, while IC imports rose 56.6 per cent, Wang said.