

THE NEW ERA OF CHINESE MANUFACTURING

**INNOVATION, SUSTAINABILITY,
AND GLOBAL STRATEGY**



Canada China Business Council
Conseil d'affaires Canada-Chine
加中贸易理事会

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**Executive
summary**

1. Overview of the Chinese manufacturing sector

China's manufacturing industry, which contributes 31.7% to China's GDP in 2023, remains a global powerhouse with a 28.4% share of global manufacturing output. Despite a global shift towards service-oriented economies, China's manufacturing sector continues to show robust growth, increasing by 7.10% in December 2023 alone. The sector is diversified, covering electronics, automotive, textiles and machinery, and is increasingly embracing advanced and renewable technologies. China dominates several industries, including electronics, textiles, automotive and steel production. For example, it is the world's largest producer and exporter of consumer electronics and textiles, and has become the largest automotive market, with significant advances in electric vehicles (EVs). The steel industry also reflects China's industrial power, with 54.8% of world production in 2023.

2. Policy environment in China

China's foreign investment environment is underpinned by the Foreign Investment Law (FIL) of 2020, which offers foreign investors national treatment and delineates investment restrictions through the negative list to protect strategic industries. This framework is complemented by strategic initiatives such as "Made in China 2025," which aims to promote high-tech industries and reduce dependence on imported technologies. This initiative aims to increase domestic production of essential components to 70% by 2025, thus guaranteeing integration into the global value chain. Intellectual property rights seem to be enforced more and more over the years, aligning with international standards to protect innovations crucial to China's industrial ambitions. China operates a first-to-file system for trademarks and requires explicit registration for patents to be recognized, which is imperative for foreign companies to understand

when entering the Chinese market. Furthermore, China's growing commitment to environmental protection is in line with its progressive policies. In particular, the country is the world's largest carbon emissions trading market. These measures are in line with China's goal of achieving carbon neutrality by 2060.

3. Supply chain and logistics

China has established itself as a global leader in supply chain and logistics, thanks to investments in infrastructure and technologies. The country is a proponent of industrial automation, with growth evidenced by the installation of around 290,000 industrial robots by 2022, more than half the world total. This increase has more than tripled China's robotic density since 2017, improving its production efficiency. In addition, China's maritime infrastructure plays a crucial role in its logistics capabilities, with major ports such as Shanghai, Shenzhen and Ningbo-Zhoushan handling over 50% of the world's container throughput. These ports are vital nodes in the international shipping and logistics network. In addition, China's extensive road and rail networks ensure seamless national logistics, complemented by significant air freight capacity. For example, Shanghai Pudong International Airport is the world's third busiest airport for freight, with an airfreight volume of 20.96 billion tonne-kilometres in 2021, making China the world's second-largest airfreight market.

4. Technology and innovation

China is actively participating in the global digital economy, with substantial investments in emerging technologies such as AI, blockchain, cloud computing and big data. These technologies are accelerating innovation, reshaping industries and pushing the global

economic landscape towards a more digital and interconnected future. The "Made in China 2025" initiative highlights China's strategy to advance its industrial productivity through automation and digitization, targeting leadership in high-tech industries. This government-led initiative aims to foster technological development and integration, making China a key player on the evolving global technology scene. By 2019, China's digital transformation already achieved significant results, with digital technologies accounting for 36.2% of its GDP. The country boasts nearly 8,000 digital workshops and smart factories, boosting R&D and improving production efficiency.

5. Labour market dynamics in China

China is undergoing a major transformation in the labour market, moving from a reliance on low-cost, unskilled labour to a more educated and specialized workforce. This shift is part of a broader economic strategy to move up the value chain and reduce dependence on low-end manufacturing. Increased investment in education and vocational training is preparing the workforce for more complex roles, particularly in high-tech industries. As a result, the quality of Chinese manufactured products has improved, reflecting the country's ability to innovate and compete globally. Demographic change poses additional challenges: an aging population and falling birth rates are leading to a shrinking workforce. This demographic shift is compounded by young workers' preference for more attractive and better-paying jobs in the service sector, which is putting a strain on the traditional manufacturing sector. In response, China is relying on automation and digitization to maintain production levels, which requires a workforce skilled in new technologies. This transition reflects China's efforts to adapt its economic model to changing internal and global dynamics.

6. Canada-China trade relations

Commercial relations between Canada and China have evolved. With a long-standing presence in China through an Embassy in Beijing and Consulates in major cities, as well as 10 trade offices, Canada has fostered a dynamic relationship facilitating trade, cultural exchanges and economic engagements. This network has played a role in managing the complexities of the Chinese market. Since the early 2000s, trade relations have intensified, with China becoming Canada's second-largest trading partner for manufactured goods. The share of Chinese products on the Canadian market has risen from 5.03% in 2002 to 13.40% in 2023. However, this relationship has evolved in response to changing economic conditions, supply chain transformations and geopolitical factors, prompting Canada to diversify its trade in order to reduce its dependence on Chinese imports and improve its economic resilience.

7. Sustainability and ESG

China's commitment to sustainable development has led to a shift in environmental, social and corporate governance practices within its economy. Driven by targets to cap carbon emissions by 2030 and achieve carbon neutrality by 2060, China has made changes to corporate behaviour, encouraging companies to adopt low-carbon models and improve ESG reporting. Since 2016, regulatory frameworks have been strengthened, starting with the "Guiding Opinions on Building a Green Finance System," which make it mandatory for listed companies to publish environmental information. Despite the challenges and generally low ESG scores of Chinese companies, advances in regulatory frameworks and growing investor demands are fostering a more robust and transparent ESG landscape.

Introduction

The People's Republic of China today occupies an unrivalled position in the global manufacturing arena and symbolizes an era of profound industrial transformation. The nation's ability to capture a significant share of the world's manufacturing output testifies not only to its dominance in terms of volume, but also to its ascent into innovative, high value-added sectors. This transition marks a decisive turning point in the country's industrial strategy, geared towards excellence and innovation.

In this document, Duviter takes you on an in-depth exploration of China's meteoric rise, revealing the key factors behind its success and outlining the prospects for its future. We invite you to understand the mechanisms and ambitions behind China's evolution, from its massive investment in research and development to its commitment to the adoption of cutting-edge technologies. These strategic initiatives illustrate China's determination to take the next step from simple mass production to an industrial economy focused on quality, innovation and sustainability. We invite you to immerse yourself in the past, present, and promising future of China and its manufacturing sector.

1

Overview of the Chinese manufacturing sector

1. Current state

China's manufacturing sector currently stands as the largest in the world, a testament to the country's monumental rise over the past few decades. With a commanding 28.4% share of global manufacturing output, China has firmly established itself as the world's manufacturing powerhouse. This dominant position is the result of years of efforts to grow its economy, attract foreign investment, and leverage its vast labour force and infrastructure capabilities.

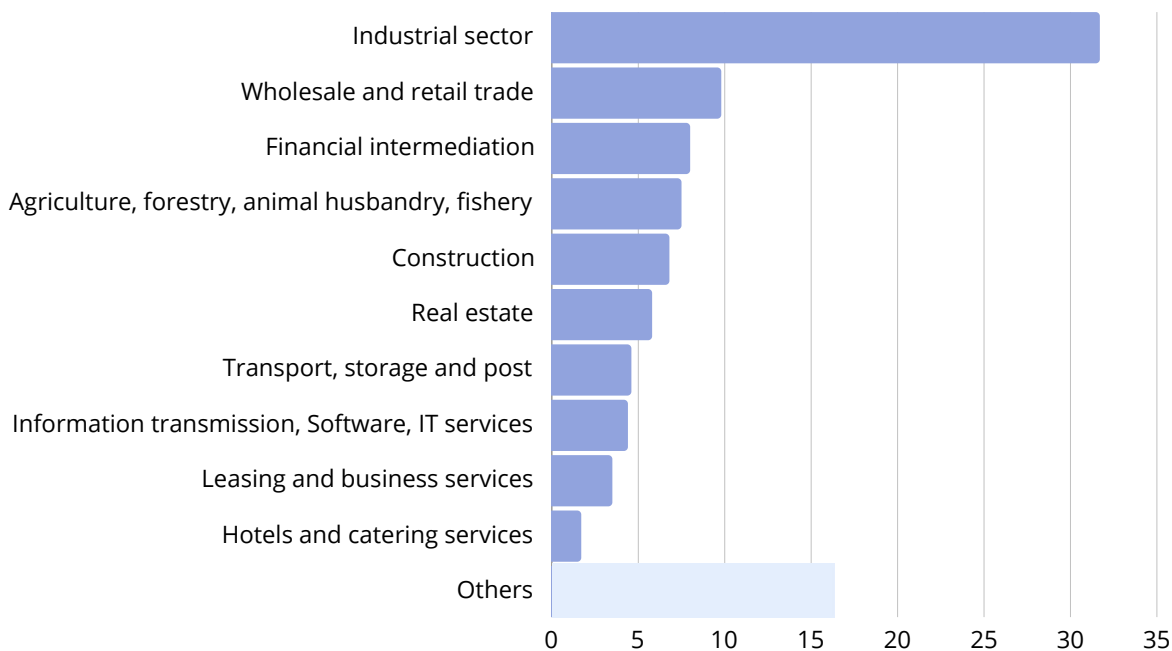
Today, China's manufacturing sector is characterized by its diversity, covering a wide range of industries such as electronics, automotive, textiles, and machinery. China is also focusing on emerging technologies such as renewable energy equipment and robotics. This underlines China's diversification across all manufacturing sectors, while highlighting its strategic move up the value chain, with the aim of remaining the preferred destination for manufacturing, as well as being at the forefront of innovation and technology. The sector has shown resilience and adaptability, with manufacturing output up 7.10% year-on-year in December 2023, demonstrating sustained growth despite global economic uncertainties.

Moreover, the manufacturing industry continues to play a pivotal role in China's economy. As illustrated in the accompanying graphic, the industrial sector alone accounts for 31.7% of China's GDP in 2023, despite a gradual decline from 45.5% in 2010. This shift underscores China's transition towards a more balanced and service-oriented economy, yet manufacturing remains a critical engine of economic growth, innovation, and development for China. The graphic not only corroborates the manufacturing sector's substantial share of the GDP but also situates it within the broader spectrum of China's economic

activities, underpinning its status as a global industrial leader and shaping its future economic trajectory.

Distribution of the gross domestic product in China in 2023, by industry

OECD



2. Dominant industries

Within China's vast manufacturing landscape, several industries stand out for their global dominance, scale, and technological advancement. Electronics, textiles, automotive, and steel are among the sectors where China has established clear leadership.

The electronics industry, in particular, exemplifies China's manufacturing prowess, with the country being the world's largest producer and exporter of consumer electronics, including smartphones, computers, and televisions. This dominance is underpinned by a comprehensive supply chain ecosystem, extensive manufacturing capabilities, and significant investment in R&D. This sector benefits from China's extensive manufacturing ecosystem and

robust growth rates, including the overall sector's recent 7.10% increase in production. China's role as the "world's factory" for electronics is not just about quantity; it's increasingly about leading in innovation and quality.

Textiles and clothing are a cornerstone of China's manufacturing sector, benefiting from the country's rich history of silk production and its skilled workforce. In 2022, China remains the world's leading textile exporter, with an export value approaching \$148 billion. A position it has maintained thanks to the ongoing modernization of its textile industry and the adoption of sustainable, efficient manufacturing practices. Already in 2019, China welcomed over 140,000 industrial robots to its textile production lines.

The automotive industry in China has seen remarkable growth, making China the world's largest automobile producer. Including the production of BMW and Volvo models, Chinese automobile exports accounted for 4.91 million units last year. This industry's expansion is driven by both domestic consumption and exports, alongside China's ambition to lead in EV production. The government's support for clean energy and EV technologies has positioned China at the forefront of the global shift towards electrification in transportation. The result is that one in three vehicles exported from China is electric. In addition, several Chinese brands, such as BYD and Nio, are making their appearance on the international market. The latter is a competitor to Tesla, which manufactures over 300,000 electric motors a year with just 30 technicians.

Steel production is another area where China leads globally, accounting for a significant portion of the world's steel output. In fact, China produced 1.019 billion tonnes in 2023, or 54.8% of total world steel production.

These dominant industries illustrate China's strategic approach to its manufacturing sector—leveraging scale, investing in technology, and moving up the value chain. By focusing on key areas where it holds competitive advantages, China continues to reinforce its status as a global manufacturing leader, driving innovation and setting standards across industries.

3. Emerging sectors

As China continues to evolve its manufacturing landscape, several emerging sectors are poised to play pivotal roles in the country's industrial future, reflecting a strategic shift towards high-value, technologically advanced production. Among these, renewable energy equipment, EVs, biotechnology, and advanced robotics stand out, showcasing China's ambition to lead in global innovation and sustainability.

Renewable energy equipment: China's commitment to addressing climate change and reducing its carbon footprint has propelled it to the forefront of renewable energy equipment manufacturing. The country is the world's leading producer of solar panels, wind turbines, and batteries for energy storage solutions. This leadership is bolstered by significant investments in research and development, government support for renewable energy projects, and a vast domestic market for clean energy technologies.

Electric vehicles (EVs): In the automotive sector, China's push towards electrification has made it a hotbed for EV innovation and production. With supportive government policies, substantial investments, and a rapidly growing domestic market, China is not just the largest market for EVs but also a major hub for EV manufacturing.

Chinese companies are increasingly competitive in the global EV market, contributing to the sector's technological advancement and adoption worldwide.

Biotechnology: The biotechnology sector in China is burgeoning, driven by heavy investment in research and development and a strategic emphasis on healthcare innovation. China aims to become a leader in pharmaceuticals, gene therapy, and personalized medicine, leveraging its large population for clinical trials and data collection. This focus on biotechnology not only promises to transform healthcare within China but also positions the country as a key player in the global biotech industry.

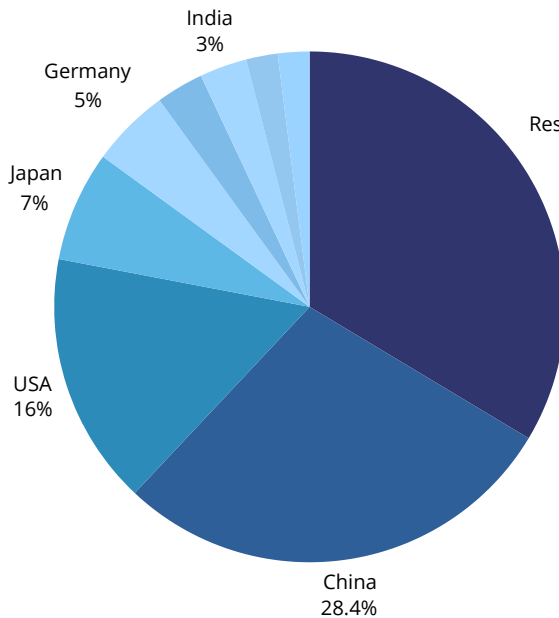
Advanced robotics and artificial intelligence (AI): China's manufacturing sector is increasingly adopting advanced robotics and AI to enhance efficiency, productivity, and quality. The country is rapidly becoming a hub for the development and deployment of industrial robots, with applications ranging from electronics assembly to automotive manufacturing. Furthermore, China's strategic focus on AI research aims to integrate AI technologies across various industries, enhancing innovation and maintaining its competitive edge in the era of smart manufacturing.

These emerging sectors illustrate China's strategic pivot from focusing on mass-producing simple goods to be a leading force in high-tech and sustainable manufacturing. By investing in these areas, China not only aimed at elevating its industrial capabilities but also at addressing global challenges such as climate change and healthcare, helping positioning itself as a key driver of future technological and industrial advancements.

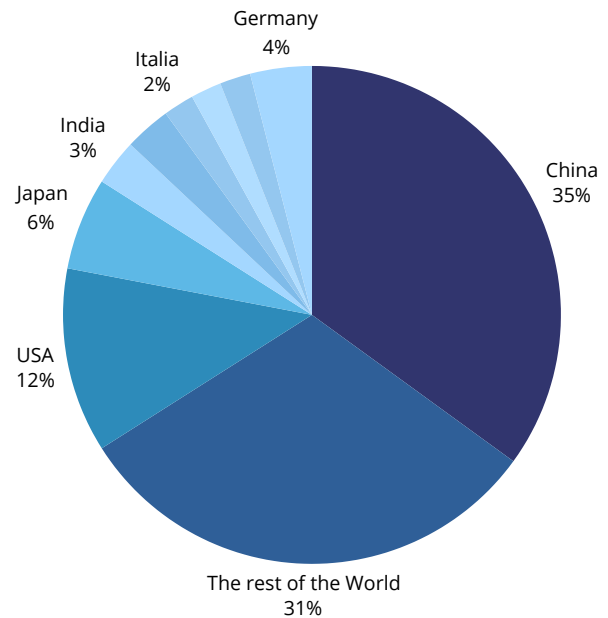
4. Global standing

China's global standing in the manufacturing sector is unparalleled, establishing it as the indisputable leader in global manufacturing output. Holding a commanding 28.4% of the world's manufacturing output, China outstrips other industrialized nations, reflecting its monumental rise and sustained dominance in the international manufacturing landscape. Commanding an impressive 35% of the world's gross manufacturing production, as depicted in the accompanying graph, China outstrips other industrialized nations and encapsulates its monumental rise and sustained dominance in the international manufacturing landscape.

World's biggest manufacturing economies
OECD



Value added (% of world)
OECD



Gross production (% world)
OECD

China's ascendancy to the top of the global manufacturing hierarchy is not merely a function of its vast output but also a testament to its strategic adaptation and innovation within key industrial sectors. From electronics to automotive, China has moved to becoming a leader in technological advancement and sustainable manufacturing practices. This evolution is underpinned by significant contributions to the country's GDP, with manufacturing accounting for 31% of China's GDP in 2023, a clear indicator of the sector's critical role in China's economic strategy.

Through these transformations, China's manufacturing spanned across diverse geographical landscapes, with regional manufacturing hubs being built mainly in coastal provinces, and the Yangtze River Economic Zone playing a pivotal role. These hubs specialize in various industries, making China not just a monolithic manufacturing giant but a complex, multifaceted ecosystem capable of producing a vast array of products, from basic consumer goods to advanced technological components. China's global standing in manufacturing, reinforced by its strategic focus on emerging sectors and its integral role in global supply chains, positions it not only as a key player but as the leading force shaping the future of global manufacturing.

Summary

The overview of China's manufacturing sector highlights a path of significant transformation and growth. Through strategic economic reforms, it has risen to global manufacturing dominance and branched into emerging high-tech industries. This landscape represents a rich mix of history, innovation, and global integration. Looking ahead, the sector's adaptability and ongoing evolution will be crucial for sustaining its global leadership and addressing the challenges of the worldwide economy.

2

Policy environment of China's manufacturing sector

1. Foreign investment climate and regulatory framework

China's investment climate has been tuned to create a hospitable environment for foreign capital, leveraging its ample financial resources and strong competitive position in the global market. The country's considerable local consumer base and stable policy environment are primary drivers for attracting foreign businesses. This is supplemented by China's openness to international trade, providing a gateway for foreign companies to not only tap into the vast Chinese market but also to engage with broader Asian economies.

At the core of the legal framework governing foreign investments is the Foreign Investment Law (FIL). Implemented in 2020, this idea has proven to be pivotal. It offers foreign investors national treatment, which levels the playing field with domestic companies and simplifies the earlier, more fragmented regulatory system. However, the FIL also delineates clear boundaries with the Negative List, which specifies sectors where foreign investment is restricted or prohibited, ensuring China's strategic industries remain under national control.

This regulatory environment under the FIL is further supported by measures to promote investment, such as equitable access to government funding and land resources, tax incentives, and a more transparent licensing and application process. Collectively, these legal and regulatory frameworks underscore China's commitment to fostering a business climate that is both welcoming and competitive for foreign investment, while also safeguarding its economic interests.

2. Strategic initiatives and intellectual property rights

Strategic initiatives like "Made in China 2025" (MIC 2025) showcase China's resolve to redefine its manufacturing landscape and ascend the global value chain. This ambitious plan focuses on elevating China's high-tech industries, from robotics and aerospace to new energy vehicles, positioning it as a global competitor against established tech nations. The initiative targets the development of domestic capabilities in critical components and advanced technology, aiming to reduce reliance on imported technology. The initiative sets precise targets, aiming to increase domestic production of essential components and materials to 70% by 2025. The plan also includes specific guidelines concerning the percentage of the technology market to be held by Chinese companies and the quota of spare parts to be produced locally. Thus, there is no formal discrimination against foreign companies, provided they adapt their production so that their products are considered "made in China."

Intellectual property (IP) rights are central to this strategy, as China strengthens its legal framework to protect innovations critical to its industrial ambitions. Since joining the World Trade Organization in 2001, China has made efforts to align its IP laws with international norms, enhancing the enforcement of IP rights through specialized courts. Forms of IP such as trademarks, patents, copyrights, trade secrets, geographical indications, and plant breeders' rights are protected under Chinese law. However, IP rights are jurisdictional rights. Therefore, a Canadian patent does not offer automatic rights in China. It is therefore crucial to register IP in China if you plan to do business there. It is important to note that China applies the first-to-file principle for trademarks, which means the first-to-file principle obtains the rights, regardless of prior use. This rule differs significantly from the Canadian system and needs to be integrated into an IP strategy adapted to China. In addition, for patent

following a first application filed in Canada or elsewhere, a 12-month period is allowed to extend protection to other countries, including China. If this period is exceeded, the invention loses its novelty. It is therefore crucial to include China in the initial patent application.

3. Environmental compliance and green development

Environmental compliance in China is undergoing a significant evolution, reflecting the state's determination to move towards a greener economy. The legislative landscape has become increasingly robust with the introduction of new rules for pollution control, waste treatment and environmental remediation, taxation of greenhouse gas emissions, and the decline of carbon-intensive industries such as coal. In addition, China has set itself the goal of carbon neutrality by 2060. These changes mean that companies operating in China must be ready to adapt and adhere to constantly evolving environmental standards to avoid the repercussions of non-compliance.

In July 2021, China launched the world's largest carbon emissions trading market, marking a milestone in its environmental regulation. The system, which differs from Canada's, is based on a national Emissions Trading Scheme (ETS) rather than a direct tax. The Canadian system, on the other hand, is primarily a carbon tax that applies to many economic sectors and increases each year. In 2022, this tax was C\$50 per tonne of CO₂, with a projection of C\$170 per tonne by 2030. Under the Chinese system, companies acquire or receive emissions permits, which they can then trade on the market. This trading market aims to encourage emissions reductions by setting emission limits for companies and allows the trading of these emission rights.

Furthermore, the Enterprise Environmental Information Legal Disclosure Administration Measures, effective February 2022, reinforce the necessity for transparency and accountability. Companies are now mandated to disclose their environmental impact regularly, contributing to a culture of environmental awareness and governance. Failure to comply with these requirements not only incurs financial penalties but can also lead to reputational damage and affect the ability to secure government contracts.

Collectively, these environmental policies and regulations represent China's commitment to addressing the ecological challenges presented by rapid industrialization. They create a more predictable and structured framework for businesses to align with sustainable practices, ultimately contributing to China's and the global community's environmental goals. For readers seeking to deepen their understanding of China's environmental objectives and its emissions data, further details are available through the following link: https://unctad.org/system/files/official-document/gds2023d6_en.pdf.

Summary

In conclusion, China's policy strategy seeks to elevate its global standing in manufacturing and technology, while emphasizing sustainability. Through a balanced approach of attracting foreign investment, safeguarding strategic sectors, and environmental protection, China is forging a path that solidifies its status as an industrial powerhouse and leader in sustainable innovation. This multifaceted strategy underscores China's commitment to fostering growth, competitiveness, and environmental stewardship, ensuring its continued prominence on the world stage.

3

Supply chain and logistics

1. Infrastructure and network

China's emergence as a global supply chain leader is firmly rooted in its strategic investment in manufacturing infrastructure and technological advances. This fundamental strength has enabled the development of a highly efficient and extensive network, encompassing suppliers, manufacturers, logistics providers, and distributors, which collectively enhance the country's supply chain capabilities.

The key to this infrastructure is the use of cutting-edge technologies to increase efficiency and reduce lead times. Indeed, China has seen significant growth in the technology sector, mainly driven by advances in automation and artificial intelligence. In 2022, global deployment of industrial robots set a record, with over 550,000 new installations, a 5% year-on-year increase. According to statistics from the International Federation of Robotics, around 290,000 of these robots were installed in China, representing more than half of the global total. As a result, robotic density in Chinese industry has more than tripled from 2017 to 2021, rising from 97 to 322 robots per 10,000 employees, making China one of the world's most dynamic markets. In comparison, Japan and the USA follow far behind, with over 50,000 and nearly 40,000 robots installed by 2022 respectively.

Moreover, China's commitment to improving its supply chain network extends beyond its borders. Initiatives such as the Belt and Road Initiative (BRI) underline China's vision of a more interconnected global trade network, facilitating smoother, more efficient trade routes between Asia, Europe, and Africa.

In addition, the integration of the technological infrastructure has reached such a level that companies are now able to connect international consumers directly with manufacturers. For example,

the Temu platform, owned by PDD Holdings, represents an emerging model of direct commerce without intermediaries. Having established a dominant position in the Chinese consumer market, PDD Holdings is extending its influence internationally with Temu, building on the business model that contributed to its initial success in China. Operating from China, Temu has attracted millions of users thanks to its competitive prices on unbranded products, produced directly in Chinese factories.

2. Ports and maritime connectivity

China's strategic development of its port infrastructure stands as a testament to its ambition and foresight in global logistics and supply chain management. With over 50% of the world's container throughput passing through its ports, China has established a formidable maritime gateway that facilitates the efficient movement of goods on a global scale. Leading ports such as Shanghai, Shenzhen, and Ningbo-Zhoushan are not just pivotal for China's trade; they are central hubs in the world's shipping and logistics network, highlighting China's critical role in global commerce.

The Port of Shanghai, as the world's busiest container port, epitomizes China's maritime prowess. Handling immense volumes of cargo and container traffic, Shanghai serves as a crucial node for international trade, backed by its strategic location and state-of-the-art facilities. The integration of the Yangshan Port, the world's largest automated port, within Shanghai's port complex, underscores China's commitment to leveraging technology to enhance port efficiency and capacity.

Similarly, the Ports of Shenzhen and Ningbo-Zhoushan exemplify China's maritime strength. Shenzhen's evolution into one of the world's leading ports reflects its dynamic role in the Pearl River Delta,

one of the most vibrant economic regions globally. Ningbo-Zhoushan, renowned for its cargo throughput, serves as a vital link in China's maritime logistics, connecting the country with over 90 countries and 560 ports worldwide.

The BRI aims to increase China's maritime connectivity, by establishing new trade corridors and strengthening existing ones. By encouraging infrastructure development and investment in Asia, Europe and Africa, the BRI aims to ensure that China's ports, and by extension its supply chain network, remain at the forefront of international trade and logistics.

3. Rail and road development

China's dedication to expanding and modernizing its transportation infrastructure, particularly through its extensive railway and road networks, is a cornerstone of its supply chain and logistics prowess. The country possesses one of the largest road networks globally, complemented by a sprawling and efficient railway system that includes the world's most extensive high-speed rail network. This comprehensive connectivity facilitates the seamless movement of goods across the vast nation, from coastal ports to inland manufacturing hubs, thereby enhancing supply chain efficiency and reliability.

The railway system is indicative of China's logistics ambitions. The expansion of high-speed rail lines not only speeds up the domestic flow of goods, but also supports China's broader BRI initiative. This initiative has led to the development of new freight train lines and cross-border rail projects, further integrating China into the global trade network.

Simultaneously, China's road network, measuring millions of kilometres, ensures that even the most remote areas of the country are accessible, supporting the distribution of goods nationwide. The decline in road freight volume in recent years has not deterred the overall growth of China's logistics and supply chain capabilities, showcasing the resilience and adaptability of its transportation infrastructure.

Moreover, the BRI represents China's strategic approach to global infrastructure investment, enhancing its logistical links not just within its borders but across continents. This ambitious project underscores China's vision of a more interconnected global economy, with China at its hub. By investing in international rail and road projects, China exports its infrastructure prowess abroad, cementing its role as a key driver of global supply chain and logistics innovation.

4. Air freight capabilities

China's rapid expansion in air cargo capabilities marks a significant evolution in its logistics and supply chain strategy, positioning it as a critical player in global air freight. With 238 civil aviation airports, including Beijing's position as the world's second busiest airport for air freight, major Chinese airports have become vital hubs. For example, Shanghai Pudong International Airport ranks as the world's third busiest airport in terms of cargo traffic, with 3,440,084 tonnes in 2023, behind Hong Kong International Airport and Memphis International Airport. This strategic development in air cargo transportation is supported by substantial investments in airport infrastructure, enhancing China's ability to manage an increasing volume of air freight efficiently.

In 2021, China's airfreight sector recorded a total volume of 20.96 billion tonne-kilometres, representing around 10% of global volume. This volume puts China well ahead of Canada, which achieved a volume of around 3 billion tonne-kilometres, and makes China the world's second-largest air freight market after the USA (46 billion tonne-kilometres in 2021).

The strategic positioning of airports in key economic zones across China, from North to South and East to West, facilitates an integration of air cargo services with maritime, rail, and road transport modes. This multimodal connectivity enhances the efficiency of China's supply chain, providing flexibility and reducing transit times for international trade.

Furthermore, China's focus on developing its air cargo sector is not only about expanding physical infrastructure but also about integrating advanced technologies and management practices to increase capacity and streamline operations. This approach ensures China remains at the forefront of global logistics, capable of meeting the demands of an increasingly fast-paced and interconnected world economy.

Summary

China's strategic investments in supply chain and logistics have cemented its global leadership in this area. By developing top-tier ports, extensive rail and road networks, and advanced air freight, China has built a strong efficient supply chain ecosystem. This enhances its global influence and connectivity, underscoring its key role in international trade and logistics.

4

Technology and innovation

1. Digital transformation and global impact

The 21st century is turning to be a transformative era for the global economy, significantly marked by the rapid advancement and integration of digital technologies such as AI, blockchain, cloud computing, and big data. These technologies have not only accelerated the pace of innovation across various sectors but have also fostered a deeper integration between industries, leading to the creation of new business models and economic opportunities. Consequently, the global economic landscape has shifted towards a digital economy, with digitalization driving a scientific and technological evolution.

In this context, China has emerged as a significant player, demonstrating agility in closing the technological gap with more developed economies. The country's substantial investments in research and development (R&D) have been pivotal in its technological advancement. Innovations in key areas such as 5G, artificial intelligence, and renewable energy sources underscore China's commitment to harnessing the potential of new technologies to fuel its economic growth and industrial modernization. This strategic focus on technological innovation is further reinforced by the Chinese government's supportive policies and initiatives, which aim to cultivate an environment conducive to technological development and application.

The impact of these digital technologies on China's economy and, by extension, on the global stage, cannot be overstated. They are set to fundamentally alter the competitive dynamics among nations by reshaping industrial structures and creating new paradigms for economic development. As China continues to invest in and adopt cutting-edge technologies, it is positioning itself at the forefront of

the digital economy, ready to play a pivotal role in shaping the future of global innovation and industry integration.

2. Government-led innovation strategy

China's ambitious journey towards becoming a global leader in technology and innovation is strategically anchored in its government-led initiatives and policies. The "Made in China 2025" initiative illustrates this strategic direction, aiming to place China's manufacturing sector at the forefront of high-tech industries, while significantly improving productivity through automation and digitization. This initiative reflects a broader vision by the Chinese government to not only advance its position in the global manufacturing arena by 2025 but also to establish itself as a hub of breakthrough innovations and pioneering technologies by 2035.

The role of the Chinese government in this innovation-driven economy is multifaceted, extending beyond mere policy-making to actively shaping the market landscape. This includes influencing the flow of venture capital towards sectors deemed as strategic or pivotal for the country's technological advancement. Furthermore, the government's significant role in the startup ecosystem, through regulations, support programs, and the establishment of various innovation parks, provides a fertile ground for entrepreneurship and technological breakthroughs.

Through these concerted efforts, China aims to shift its reputation from being the world's factory based on low-cost, labour-intensive manufacturing to a leader in high-tech industries and innovation. By prioritizing productivity, innovation, and digitization, China sets its

sights on joining the ranks of the most advanced global manufacturing powers, underscoring the pivotal role of government policies in facilitating this transformative journey.

3. Fostering an efficient innovation economy

The rapid ascent of China's digital economy serves as a vibrant testament to the country's embrace of digital transformation. By 2019, the added value of China's digital economy soared to 35.8 trillion yuan, making up 36.2% of its GDP. This marked growth, substantially outpacing the nominal GDP growth, highlights the burgeoning significance of digital technologies in catalyzing economic development. The digital realm in China is characterized by a robust expansion of software, information technology services, and the internet service industry, which collectively propel the continuous optimization of the digital industry's internal structure.

This digital surge is underpinned by China's concerted efforts to digitalize its industrial sector. The transformation is evident in the nearly 8,000 digitalized workshops and intelligent factories across the country, signifying a monumental leap towards integrating advanced technologies into manufacturing processes. The impact of this transformation is profound, with notable enhancements in product R&D, production efficiency, and a significant reduction in carbon emissions, showcasing the tangible benefits of digitalization.

Moreover, the anticipated increase in the rate of digitalized equipment to 65% by 2025 from 51.5% in 2021 underscores the ambitious roadmap China has charted towards achieving a comprehensive digitalization of its industrial sector. This forward-looking strategy not only aims to bolster China's position in

the global manufacturing landscape but also sets a benchmark for the integration of digital technologies in enhancing industrial productivity and sustainability.

4. The rise of China's digital economy

China's relentless pursuit of fostering an efficient innovation economy is significantly shaped by the government's proactive role in nurturing and guiding technological advancements and entrepreneurship. The Chinese government's influence extends deeply into the venture capital landscape, with a substantial portion of funding originating from state-affiliated sources. This unique approach ensures that strategic sectors receive the necessary capital to accelerate their development, aligning with national priorities and technological ambitions.

The establishment of innovation parks and the implementation of initiatives such as the "Made in China 2025" plan are vivid examples of the government's commitment to creating an ecosystem conducive to innovation. These initiatives are designed to provide startups and entrepreneurs with the resources, incentives, and support needed to thrive in a competitive global market. The government's active involvement in the startup ecosystem, through policies, regulations, and direct support, demonstrates a comprehensive strategy to cultivate a culture of innovation and technological excellence.

This governmental approach has been instrumental in propelling China towards becoming a global leader in technology and innovation. By leveraging policy measures to steer the direction of technological development and startup growth, China is effectively shaping an innovation economy that is robust, dynamic, and poised for future challenges. The synergy between governmental support and

entrepreneurial initiative is paving the way for China to achieve its aspirations of technological supremacy and economic prosperity in the digital age.

5. Outlook on digitalization and manufacturing

The digitalization and intellectualization of China's industrial sector, highlighted by the significant transformation in manufacturing processes, underscores a crucial phase in the country's technological evolution. By 2019, the influence of the digital economy on China's GDP showcased a monumental shift, with the digital sector's added value reaching approximately 36.2% of the GDP. This growth trajectory not only emphasizes the rising dominance of digital technologies in economic activities but also illustrates the strategic shift towards a more integrated, digitalized industrial landscape.

The proliferation of digitalized workshops and intelligent factories across China marks a pivotal step towards realizing the vision of a highly efficient, technologically advanced manufacturing sector. The near 8,000 entities embarking on this digital transformation journey have reported remarkable outcomes: enhanced R&D capabilities, improved production efficiencies by an average of 34.8%, and a substantial reduction in the rate of defective products. Furthermore, these advancements have led to a notable decrease in carbon dioxide emissions, aligning with broader environmental and sustainability goals.

This industrial digitalization, propelled by policies and investments from both the government and private sector, is set to reach new heights by 2025, with the rate of digitalized equipment projected to increase significantly. Such progress underscores China's

commitment to embedding digital technologies within its core industrial operations, aiming to elevate the global competitiveness of its manufacturing sector.

Summary

In summary, China's journey towards technology and innovation supremacy in manufacturing is marked by a strategic blend of government initiative, digital transformation, and global integration. Through targeted investments in R&D and supportive policies, China is not just upgrading its manufacturing landscape but is also setting new benchmarks for the global digital economy.

5

Labour market dynamics in China

1. Workforce transformation and demographic shifts

The transformation of China's labour force from predominantly unskilled to increasingly specialized and skilled marks a pivotal shift in the nation's economic narrative. For decades, China's competitive advantage in the global market was heavily reliant on its vast supply of cheap labour, powering its status as the "world's factory." This labour force was the backbone of China's export-led growth model, characterized by mass production and low-cost manufacturing. However, this model has evolved in response to both internal developments and changing global dynamics.

In the last decades, the characteristics of China's labour market have significantly shifted. The workforce has transitioned from being cheap and unskilled to becoming better educated and specialized. This shift is a direct reflection of China's broader economic strategy, aiming to move up the value chain and reduce its reliance on low-end manufacturing. The government's push for innovation and higher-value production has led to an increased demand for a workforce capable of handling more complex tasks and contributing to the development of advanced technologies and industries.

This transformation is underscored by substantial investments in education and vocational training, aiming to equip the labour force with the skills necessary to thrive in an increasingly competitive and technology-driven global economy. The focus on fostering a specialized workforce is evident in the rising numbers of university graduates and professionals with expertise in fields such as engineering, information technology, and renewable energies.

This shift towards a more skilled and specialized labour force has had

a profound impact on the quality of products and services manufactured in China. The country is gradually shedding its reputation for producing low-quality goods and is now recognized for its capacity to manufacture high-tech products and lead innovation in various sectors. This transition not only enhances China's competitive advantage on the global stage but also opens up new avenues for economic growth and development.

3. Global manufacturing and tech hub

One pivotal factor is the demographic transition characterized by an aging population and declining birth rates, coupled with minimal immigration. These elements contribute to a shrinking labour force, a trend that could be further exacerbated by changing aspirations among the younger workforce. Many young Chinese workers now eschew traditional manufacturing roles, which are often perceived as monotonous and low-paying, in favour of opportunities in the service sector where jobs are seen as more engaging and offering higher wages.

This shift in labour preferences is happening against the backdrop of China's significant economic transformation. The country's rapid development has led to increased living standards and a growing middle class, which in turn has raised expectations regarding employment conditions and quality of life. As a result, the manufacturing sector finds itself grappling with a labour shortage, despite the country's large population. This shortage poses a considerable challenge to China's position as the "factory of the world," a status it has maintained through its competitive advantage in manufacturing.

Moreover, the recent decline in China's population, the first in

decades, signals a looming crisis for the labour market. UN demographic modeling suggests a stark decrease in China's population by 2100, which will inevitably lead to a contraction of the workforce. This demographic trend threatens to undermine the foundations of China's economic model, which has historically relied on the dynamism and productivity of its workforce.

To navigate these challenges, China is increasingly turning to technological solutions, such as automation and digitization, to sustain its manufacturing output. However, these measures also necessitate a workforce that is skilled in new technologies, further shifting the labour market demands. As China confronts these labour market dynamics, the country is at a critical juncture, needing to balance its economic ambitions with the realities of its changing demographic and labour landscape.

Summary

China's labour market dynamics are characterized by significant shifts towards specialization, an aging population, technological advancement, and evolving employment preferences. These changes reflect the broader economic and social transformations underway, as China navigates its transition to a more developed and technologically advanced economy.

6

**Canada-China trade
relations and strategic
reorientation**

1. Historical ties and diplomatic framework

Canada's diplomatic and trade relations with China, established well before the formal diplomatic ties were made in 1970, have long been a cornerstone of Canada's international economic engagements. With an embassy in Beijing and consulates general in major cities like Chongqing, Guangzhou, and Shanghai, Canada has firmly entrenched its diplomatic presence across China. This expansive network is crucial for facilitating trade, cultural exchanges, and political dialogue between the two nations.

This comprehensive diplomatic and trade infrastructure underscores the strategic importance attributed to the Canada-China relationship. It reflects a recognition of China's significant role in the global economy and the potential benefits of a robust trading relationship for Canada. Over the years, these diplomatic missions have supported countless initiatives to promote trade, cultural understanding, and bilateral cooperation, laying the groundwork for a dynamic and multifaceted relationship between Canada and China.

2. Evolving economic interactions and diversification

Since the turn of the 21st century, the trade relationship between Canada and China has undergone significant evolution, becoming increasingly integral to Canada's economic strategy. China's ascension to Canada's second-largest trading partner in manufactured goods is a testament to the deepening economic ties between the two nations. This relationship has seen China's share of total Canadian manufactured imports increase dramatically, from 5.03% in 2002 to 13.40% in 2023, underscoring the growing importance of Chinese goods in the Canadian market.

The trajectory of this trading relationship reflects broader global economic trends and the dynamic nature of international trade. The increase in trade volume indicates not just the competitive advantage of Chinese manufacturing in terms of cost and efficiency but also the diversification of goods being exchanged. However, the slight decline in China's share of Canadian imports from its peak before 2023 suggests a shift in the trade dynamics, influenced by various factors including changing macroeconomic conditions, supply chain adjustments, and geopolitical developments.

This nuanced shift in trade patterns is indicative of Canada's response to evolving global economic landscapes and domestic needs. As consumer behaviour in Canada changes and the global supply chain undergoes transformation, particularly in the wake of the COVID-19 pandemic, there is a noticeable trend towards diversifying sources of imports. Economic and geopolitical factors, including rising labour costs in China and intensifying competition between major global powers, have prompted Canada to explore

alternative markets. This strategic shift aims to reduce over-reliance on Chinese products, seeking a more balanced and resilient supply chain that can better adapt to future economic uncertainties.

3. Strategic responses to geopolitical dynamics

In recent years, Canada has embarked on a strategic shift to diversify its trade relations, particularly in light of the growing economic and geopolitical challenges associated with its heavy reliance on Chinese imports. This move towards diversification is a response to a variety of factors that have reshaped the landscape of international trade. Notably, the perception of risk associated with geopolitical tensions and the rising costs of Chinese labour have been significant motivators for Canada to seek out new trading partners.

The economic disruption experienced during the COVID-19 pandemic has further underscored the vulnerability of over-dependence on a single market for imports. This period highlighted the need for a more resilient and diversified supply chain that could withstand global shocks. Additionally, the intensifying competition and strategic rivalry between USA and China have added another layer of complexity, making trade diversification not just an economic prerogative but also a strategic necessity.

Canada's Indo-Pacific Strategy, unveiled in November 2022, encapsulates this reorientation of trade policy by labeling China as an "increasingly disruptive global power." This document reflects Canada's efforts to recalibrate its international trade and diplomatic engagements, prioritizing increased cooperation with other partners in the Indo-Pacific region. By doing so, Canada aims to mitigate potential problems that could arise from geopolitical competition with Beijing and reduce its trade dependence on China.

This strategic effort to diversify trade relations is influenced not only by geopolitical considerations but also by changing economic factors, such as the escalating labour costs in China, which in turn increase the cost of imports. The strategy represents a broader attempt to adapt to the evolving economic landscape, ensuring Canada's economic security and prosperity in an increasingly multipolar world.

Summary

The dynamics of Canada-China trade relations encapsulate a period of strategic reevaluation for Canada, as it seeks to balance economic interdependence with China against the imperatives of national security, geopolitical stability, and economic diversification. This delicate balancing act reflects broader trends in international trade relations, where economic considerations are increasingly intersected by strategic and political factors.

7

Sustainability and ESG evolution in China

The emergence and rapid development of Environmental, Social, and Corporate Governance (ESG) reporting in China signal a significant shift towards sustainability and social responsibility in the Chinese economy. This transformation is largely driven by China's commitment to greening its economy and achieving ambitious environmental targets, such as peaking carbon emissions by 2030 and reaching carbon neutrality by 2060. These goals necessitate a substantial shift in corporate practices, pushing companies to adopt low-carbon business models and enhance their ESG reporting.

The regulatory framework for ESG in China has evolved through a series of strategic steps initiated by key regulatory bodies, including the People's Bank of China and the China Securities Regulatory Commission. Starting in 2016 with the Guiding Opinions on Building a Green Finance System issuance, China laid the groundwork for mandatory environmental information disclosure by listed companies. This move towards a structured ESG reporting system was further advanced through subsequent regulations and agreements to bolster environmental information disclosure and promote green investments.

Challenges remain despite the proactive measures taken by Chinese regulators and the clear trajectory towards enhanced ESG practices. As of now, ESG scores are voluntarily disclosed by companies but according to the proposal, China will introduce regulations for climate-related disclosure by 2027, and then establish a nationwide standard by 2030.

In late May 2024, the Ministry of Finance wrote in a statement the different guidelines of its project to introduce basic regulations for corporate sustainability disclosure and climate-related disclosure by 2027, with the aim of establishing a nationwide standard by 2030.

Looking forward, the future of ESG in China is characterized by both ongoing challenges and immense potential. The country's clear carbon milestones for 2025, 2030, and 2060 serve as pivotal markers for evaluating progress towards sustainability goals. Although ESG regulations in China were introduced relatively late compared to many other countries, the rapid pace of development in recent years underscores China's commitment to aligning its economic expansion with global sustainability and social responsibility standards.

Summary

The trajectory of ESG reporting and sustainability practices in China reflects a dynamic interplay between regulatory innovation, corporate adaptation, and the overarching goals of environmental conservation and social equality. As China continues to develop its ESG framework, the global community watches closely, recognizing the significant impact of China's sustainability journey on global efforts to address climate change and promote a more equitable world economy.

8

**Future outlook and
opportunities in Chinese
manufacturing**

As China continues to evolve and adapt its manufacturing sector to meet the demands of the 21st century, several key trends are expected to shape the future of this critical industry. These trends not only reflect China's ambitions to remain a global manufacturing leader but also its commitment to sustainable and innovative practices.

1. Towards industrial automation

The push towards industrial automation is a significant trend, with AI and robotics gaining traction across Chinese manufacturing. This shift is driven by the need to increase production efficiency, reduce human error, and address labour shortages in certain sectors. As a result, the adoption of industrial robots is becoming more widespread, signaling a move towards a more automated and technologically advanced manufacturing landscape. This transition is expected to enhance China's competitiveness by streamlining operations and enabling manufacturers to meet the increasing demands for precision and customization in production.

2. Infrastructure progress

Investment in infrastructure modernization is another critical trend, with China aiming to bolster its manufacturing capabilities through technological advancements. The planned development of state-of-the-art manufacturing facilities equipped with artificial intelligence, advanced technological equipment, and 5G networks is set to revolutionize the industry. This infrastructural progress is designed to support a growing economy and population, ensuring that China's manufacturing sector remains at the forefront of innovation and efficiency.

3. Emphasis on innovation

The shift from quantity to quality and from ordinary to innovative products marks a significant change in China's manufacturing philosophy. The industry is moving towards employing skilled personnel capable of driving innovation and adopting advanced production techniques. This emphasis on innovation is expected to foster the development of high-quality, cutting-edge products, further solidifying China's position as a leader in global manufacturing.

Conclusion

This document provides a comprehensive picture of the spectacular transformation of the People's Republic of China. Relying on a multi-dimensional strategy, China has succeeded in transcending its traditional role as the world's manufacturing superpower to become a leader in higher value-added fields. Through a path marked by massive investment in research and development, the adoption of cutting-edge technologies and a visionary industrial policy, China has established itself as a key player on the international stage, capable of competing with the world's largest economies.

The diversification of its manufacturing sector, from electronics to renewable energy equipment, is a perfect illustration of this move upmarket. These efforts are supported by a favourable regulatory and policy framework, such as the "Made in China 2025" initiative, which aims to promote innovation and strengthen the competitiveness of the Chinese industry on the global market. Similarly, the implementation of environmental policies and commitment to the Sustainable Development Goals testify to China's determination to reconcile economic and environmental growth. In addition, logistics infrastructure and initiatives such as the BRI also play a role in China's trade expansion. This global strategy, combining internal development and external influence, strengthens China's production capacities and expands its access to international markets.

As a result, the future of China's manufacturing sector looks promising, marked by a move towards greater innovation. These strategic orientations should open up new avenues for international cooperation and partnership.

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