

**CIC 灼识**



# **China's Autonomous Mining Truck Solution Industry Report**

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## Executive Summary

This report examines China's autonomous mining truck solution industry, which addresses traditional mining pain points, is driven by safety needs, technological progress and supportive policies, and features high entry barriers alongside strong growth potential.

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## 1. Market Overview

### 1.1 Market Definition

While China's mining industry remains a crucial economic pillar experiencing steady growth, traditional labor-intensive operations face severe sustainability challenges due to these pain points: frequent accidents, harsh and remote working conditions, aging workforce as well as low economic efficiency.

Driven by urgent safety demands, technological advancements and favorable policies, the mining sector takes the lead in the large-scale commercial application of autonomous driving. Relevant enterprises develop autonomous driving systems, V2X technology and fleet management solutions applicable to full mining workflows. Despite tough mining environments calling for in-depth research on vehicle control, perception and fleet coordination, these technologies effectively tackle traditional mining industry drawbacks and greatly improve operational safety, sustainability and efficiency.

### 1.2 Market Size and Growth

China's autonomous mining truck industry is booming. Its market size hit RMB 1.9 billion in 2024, taking up 75.6% of the closed-area intelligent driving market, and is forecast to surge to RMB 39.6 billion

by 2030 with a 65.3% CAGR. Product sales will rise from 34% in 2024 to 40% in 2030, while its 2024 total addressable market stands at RMB 550 billion.



*Note: The market size includes revenues from both product sales and fleet operations.*

*Source: CIC Reports*

China and the whole world see steady growth in autonomous mining truck shipments, with striking growth gaps among different years. Chinese ordinary and autonomous mining trucks enjoy obvious price advantages over international counterparts. Rich in mineral resources, regions including the Middle East, Australia and South America have huge market potential. High labor costs, severe staff shortages and growing demands for safer and more efficient mining

operations greatly boost local adoption of autonomous mining solutions, making these areas key markets to fuel global industry expansion.

## 2. Key Growth Drivers

### 2.1 Key Drivers

#### **Heightened Safety Standard**

The continuously increasing demand for coal and other resources causes excessive production in mining areas, thus overworking mining workers and escalating safety risks. Accidents can endanger workers and lead to mine shutdowns, disrupting production and causing significant economic losses. Autonomous mining can effectively reduce accidents caused by human error, thereby improving overall safety in mining operations.

#### **Growing Need for Cost Efficiency**

Maximizing extraction efficiency and managing costs have become essential for maintaining mining companies' competitiveness. Deploying autonomous mining vehicles can significantly reduce labor and energy costs while allowing for continuous 24-hour operation, thereby improving cost efficiency for mining companies.

#### **Technological Advancement**

Vehicle intelligence and V2X form the foundation of autonomous mining. Vehicle intelligence, powered by onboard sensors, control

systems and algorithms, equips mining trucks with intelligent driving capabilities. Meanwhile, V2X technology enables the exchange of real-time traffic information both between vehicles as well as between vehicles and road infrastructure, effectively filling the information gaps of vehicle-based autonomy and enhancing overall transportation efficiency in mining operations. The integration of vehicle intelligence and V2X technologies drives the commercialization of autonomous mining truck solutions in China.

## **Regulatory Mandate**

Chinese authorities have rolled out supportive policies and clear quantitative targets to boost autonomous mining development. Relevant official documents set timelines for coal mine intelligent upgrading, and authorities require intelligent coal mine capacity to account for no less than 60% nationwide by 2026. Tighter safety regulations further fuel market demand for autonomous mining technologies.

## **2.2 Future Outlook**

The autonomous mining truck solution industry is poised for robust and transformative growth in the coming years, driven by technological innovation, policy tailwinds, and escalating demand

for safety and efficiency.

However, the autonomous mining truck industry has substantial entry barriers, including the requirement for strong R&D capabilities, sophisticated methodologies, high product reliability and versatility for extreme environments, and integrated supply chains.



## About CIC

CIC is a professional consulting firm offering tailored end-to-end support across the full investment and financing lifecycle. The firm boasts a world-leading track record in guiding landmark first-in-sector IPOs across global markets, alongside unrivaled reach and in-depth coverage capabilities across specialized niche market segments.

CIC helps enterprises refine scalable business models and craft compelling capital narratives to enable seamless access to global capital markets, while serving as a trusted due diligence partner to investment institutions. It delivers granular industry insights and direct access to subject matter experts, empowering clients to identify high-value opportunities and mitigate critical risks effectively.

CIC team maintains deep, real-time market intelligence across a diverse set of sectors—including financial services, artificial intelligence, big data, internet, high technology, healthcare, education, entertainment, consumer goods, transportation and logistics, energy and power, environmental and building technology,



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chemicals, industrial manufacturing, and agriculture—delivering unparalleled access to sector-specific, actionable insights.

## CIC Reports & Industry Overview

At CIC, we employ a rigorous, multi-method research framework, combining primary and secondary sources to underpin our analysis. Primary research involves in-depth engagements with industry thought leaders and practitioners, particularly in supply chain finance. Secondary research synthesizes publicly available datasets from authoritative bodies, including the National Bureau of Statistics of the People's Republic of China, the State Administration of Financial Regulation (SAFR, formerly the China Banking and Insurance Regulatory Commission), the China Securities Regulatory Commission (CSRC), and public company filings. We apply proprietary data analytics frameworks to process collected information, validating findings through cross-referencing data from multiple research streams to ensure analytical rigor and reliability.

All statistical data presented is verifiable and grounded in information available as of the date of this report.



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Extracts are refined summaries of in-depth CIC industry research reports, highlighting supply and demand trends, key growth drivers, R&D trends and future outlook, etc. of various segmented fields, integrating multi-dimensional insights such as expert interviews, market surveys and industry data analysis.

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