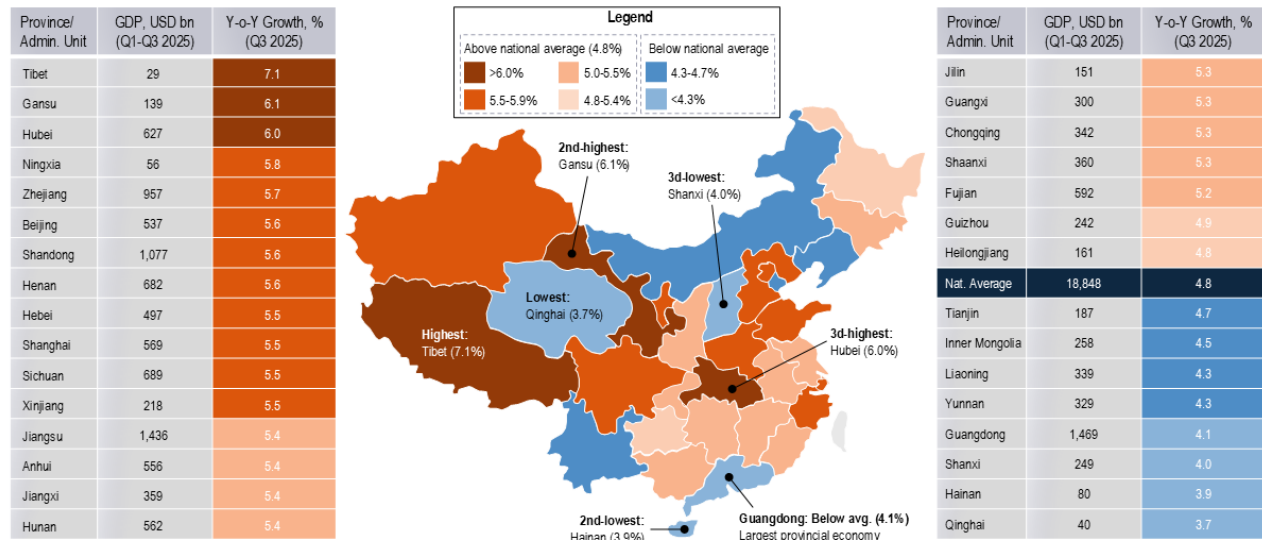


China's Fastest- and Slowest-Growing Provinces in Q3 2025

The interior and western regions are leading growth in 2025, while several heavyweight coastal hubs, most notably Guangdong, are growing at rates well below the national average.

China GDP Y-o-Y Growth by Province/Administrative Unit, % (Q3 2025) and GDP, USD bn (Q1-Q3 2025)



Source: China National Bureau of Statistics. Note: USD converted using Jul.-Sep. 2025 monthly average CNY/USD rates.

China's regional growth dynamism in 2025 is shifting from coastal export hubs to inland investment corridors, driven by investment and industrial upgrading rather than broad-based consumer strength.

In the third quarter, western provinces and inland tech hubs outpaced coastal manufacturing giants. Energy, infrastructure and emerging manufacturing hubs in central and western provinces drove momentum, while coastal export centres faced the challenge of lower external demand.

Tibet (7.1%), Gansu (6.1%) and Hubei (6.0%) led provincial growth. Western provinces continue to benefit from state-led investment in energy and infrastructure. At the same time, Hubei's performance highlights the rise of inland advanced manufacturing clusters in the automotive, battery and microchip sectors. Tibet's growth was also supported by investment and tourism.

By contrast, the coastal picture was more mixed. Zhejiang (5.7%) and Shanghai (5.5%) grew above the national average, supported by resilient services and high-tech activity. However, Guangdong (4.1%), China's largest provincial economy, underperformed amid weaker global electronics demand and subdued private sector sentiment.

Qinghai (3.7%), Hainan (3.9%) and Shanxi (4.0%) were the laggards. The service-led recovery lost steam in Hainan, while Qinghai remains structurally constrained by its scale and industrial

breadth and Shanxi's traditional energy base faced weak coal prices and ongoing industrial adjustments.

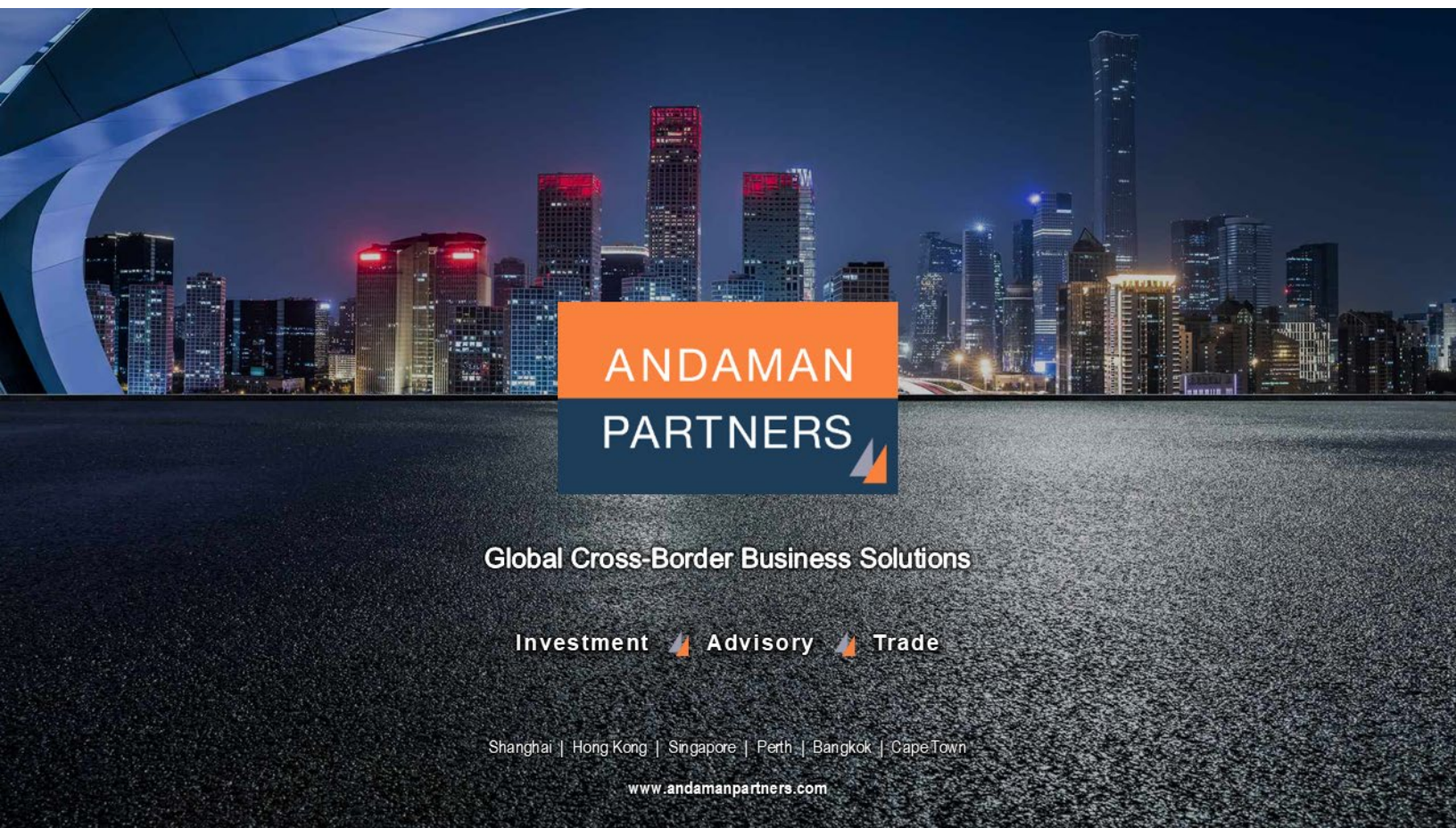
In short, China's growth in 2025 has become more regionally uneven, with inland investment and industrial upgrading taking the lead, and coastal demand-driven engines adjusting to a slower global cycle and domestic property headwinds.

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