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Global Heavy Truck Swap Station Operation Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Heavy Truck Swap Station Operation market size is expected to reach $ 2673 million by 2032, rising at a market growth of 15.4% CAGR during the forecast period (2026-2032).

Heavy Truck Swap Station Operation refers to the commercial operation and management of battery swapping infrastructure serving battery-electric heavy-duty trucks. The market primarily covers station operation, battery swapping services, electricity procurement and charging management for swap batteries, battery inventory scheduling, digital monitoring, settlement, maintenance coordination, safety management and related energy-service activities. Operators typically deploy standardized or semi-standardized battery packs and automated battery handling systems to replace depleted truck batteries within minutes, enabling high-utilization vehicles to return to service with limited downtime. Market revenue corresponds to operating income directly attributable to heavy truck battery swapping, including swapping service fees, energy-service margins, station operation and management fees and integrated operating-service income. The research scope focuses on commercial heavy truck swap stations serving mining and quarry transportation, steel mills and industrial parks, port drayage and short-haul logistics, highway trunk freight and other intensive transportation scenarios, where vehicle utilization, route predictability and daily energy consumption support commercially viable station operation.

Key Findings

China is currently the core commercialization market for heavy truck battery swap station operation, with large-scale operating networks already extending from closed-

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loop transport to highway corridors

Shanghai Qiyuan Green Power Technology Co., Ltd. reports more than 1,200 electric heavy truck charging and swapping stations across 31 provincial-level regions

QIJI Energy had built more than 300 heavy truck swap stations by the end of 2025 and plans to expand the network to more than 900 stations during 2026

China's 2026 policy framework targets around 3,000 heavy truck charging and battery swapping stations by 2030, supporting expansion from regional projects toward national corridors

Market Trends

Heavy Truck Swap Station Operation is evolving from isolated stations serving fixed-route fleets toward interconnected regional and long-distance energy networks. Early commercialization was concentrated in mines, steel plants, ports, industrial parks and other closed-loop scenarios where trucks follow predictable routes and maintain high daily mileage. The next development stage is increasingly focused on trunk logistics and cross-regional corridors, requiring operators to coordinate station spacing, battery inventory, grid capacity, vehicle scheduling and interoperability across multiple locations. At the station level, automation and unattended operation are becoming standard development directions, while cloud platforms increasingly integrate vehicle identification, battery state monitoring, automatic swapping, electricity-price optimization, fault diagnosis and settlement. Operators are also extending beyond basic battery swapping toward battery leasing, battery asset management, energy procurement, distributed renewable power, energy storage and source-grid-load-storage coordination. This transformation raises the importance of network density and operating data relative to stand-alone equipment ownership. Standardization is also strengthening: GB/T 40032.2-2025, covering battery swap safety requirements for commercial vehicles, took effect on November 1, 2025, while additional standards addressing station communications, compatibility and battery defect monitoring are being introduced, supporting broader multi-brand and multi-region operation.

Latest Developments / News

The industry entered a more explicit infrastructure-expansion phase during 2025–2026. In August 2025, Shanghai Qiyuan Green Power Technology Co., Ltd. launched centralized procurement for four-slot and eight-slot heavy truck battery swap stations

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required for its nationwide 2025–2026 expansion, reflecting continued capital deployment into operating networks. Its current operating disclosure shows more than 1,200 heavy truck charging and swapping stations, more than 100 trunk-network groups and over 54,000 batteries in operation. In December 2025, CATL reported that QIJI Energy had established more than 300 heavy truck swap stations and formed an initial trunk network covering major national expressways; in April 2026, CATL stated that the network was planned to exceed 900 stations during 2026. Policy support strengthened further in May 2026 when eleven Chinese ministries issued the Implementation Plan for Promoting Large-Scale Application of New Energy Heavy Trucks, setting a 2030 target of a 40% new-energy heavy truck penetration rate, more than 1.6 million vehicles in operation and approximately 3,000 heavy truck charging and swapping stations, while encouraging deployment along highways, ports, mines, factories and industrial parks. At the technical-regulation level, new commercial-vehicle battery swap safety and battery defect monitoring standards are reinforcing requirements for station operators to improve battery traceability, real-time monitoring, availability and emergency response. These developments indicate that competition is shifting from individual station projects toward network coverage, operating reliability and integrated energy-service capability.

Market Dynamics

Drivers

The primary growth driver is the accelerating electrification of heavy-duty road transport combined with the economic requirement to maximize vehicle operating time. Heavy trucks in mining, steel, ports and freight logistics typically have high mileage and energy consumption, making lengthy charging downtime more costly than for passenger vehicles. Battery swapping compresses the replenishment process to several minutes and therefore supports higher vehicle utilization, especially on predictable routes. The expansion of electric heavy trucks further creates the minimum fleet density required for individual swap stations to achieve commercially viable throughput. Policy support is becoming increasingly direct: China's 2026 national implementation plan promotes battery swapping infrastructure along freight corridors and in high-intensity freight nodes and targets large-scale new-energy heavy truck adoption by 2030, creating a clearer infrastructure investment pipeline.

Restraints

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Station economics remain highly sensitive to utilization. Heavy truck swap stations require battery inventories, automated handling equipment, substantial grid capacity and suitable sites, creating significant upfront investment and fixed operating costs. Where fleet density is insufficient or truck operating routes change, low daily swapping frequency can extend the payback period. Battery packs also represent a major working-capital requirement, while battery degradation, residual-value uncertainty and insurance or safety liabilities can affect profitability. Another constraint is interoperability: differences in battery dimensions, locking mechanisms, electrical and thermal interfaces and communication protocols can limit the number of compatible truck models that a station can serve. Although standardization is improving, the operating market still requires close coordination among vehicle manufacturers, battery suppliers, station operators and fleet owners.

Opportunities

The largest incremental opportunity is the expansion from closed-loop short-haul operations into highway trunk freight. National and provincial corridor development can connect existing local station clusters, increasing the addressable vehicle population and improving network effects. Heavy-duty logistics applications such as coal transport, bulk commodities, express freight and container transportation provide particularly attractive demand because vehicles typically accumulate high annual mileage. Operators also have opportunities to increase revenue per station through battery-as-a-service, battery asset management, renewable electricity procurement, peak-valley energy optimization, storage integration and vehicle-grid interaction. China's 2026 policy framework explicitly encourages integration between heavy truck charging and swapping infrastructure, renewable energy and energy storage, creating a pathway for operators to evolve from simple swapping service providers into integrated transportation-energy service platforms.

Challenges

Long-term competition will depend on whether operators can simultaneously achieve high station utilization, battery standardization and acceptable energy costs. Rapid improvements in megawatt-level fast charging could reduce the relative time advantage of battery swapping in some long-haul applications, creating competition between charging and swapping infrastructure. Operators must also manage safety risks associated with high-capacity batteries that are repeatedly charged, transferred and mechanically connected, making battery health monitoring and traceability critical.

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Expansion into trunk networks further increases operational complexity because a single fleet may depend on multiple stations maintaining consistent availability and compatible battery inventory. The market therefore favors operators with strong capital resources, fleet partnerships, battery management systems, nationwide maintenance capability and sufficient operating scale.

Value Chain Analysis

The heavy truck battery swap operation value chain begins with electric heavy truck manufacturers, battery cell and battery pack suppliers, battery swap equipment manufacturers, charging equipment companies, electrical infrastructure providers and digital platform developers. These upstream participants determine vehicle compatibility, battery cost, station automation, charging efficiency and equipment reliability. The core operating layer consists of station investors and operators that acquire or lease sites, arrange grid access, deploy swap equipment and battery inventory, operate charging systems and provide continuous swapping services. Digital systems coordinate truck identification, battery allocation, state-of-charge and state-of-health monitoring, electricity procurement, swap scheduling, payment settlement and maintenance. The downstream side consists primarily of mining companies, steel producers, industrial parks, port logistics companies, bulk-material transport fleets and highway freight operators. Value creation increasingly depends on integrating vehicles, batteries, stations and electricity rather than operating the physical swap equipment alone. High-utilization operators can improve station economics through battery pooling, peak-valley charging, predictive maintenance and standardized networks, while larger networks can also generate recurring revenue from battery leasing, energy management and fleet services.

Segment Insights

The confirmed market segmentation is based on daily battery swap service capacity, comprising Up to 50 Swaps per Day, 51–100 Swaps per Day and Above 100 Swaps per Day. Stations with up to 50 daily swaps are mainly suited to smaller dedicated fleets and localized transport routes where investment flexibility and lower grid requirements are important. The 51–100 swaps per day category is more suitable for scaled mining, steel, industrial-park and port operations, where stable vehicle flow can support larger battery inventories and higher automation utilization. Stations exceeding 100 swaps per day represent the highest-throughput operating model and are increasingly relevant to major logistics hubs, high-density industrial clusters and trunk-route networks. Such stations create greater revenue potential but require stronger grid connections, more

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battery inventory, higher scheduling efficiency and greater operating reliability. Equipment suppliers are simultaneously developing modular stations that can be expanded as fleet size increases; for example, SANY's published station configurations support automated unattended operation and different fleet scales, while GreenHub promotes modular stations and self-built plus franchise operating models.

Downstream Market Opportunities

Mining and quarry transportation, steel mill and industrial park logistics, port drayage and short-haul logistics, highway trunk freight transportation and other heavy-duty transport scenarios constitute the confirmed downstream application structure. Mining, steel and industrial-park transportation remain particularly suitable for battery swapping because fixed routes, intensive vehicle operation and centralized fleet management allow stations to maintain predictable utilization. Port drayage has similar characteristics and can integrate battery swapping with terminal decarbonization programs. Highway trunk freight represents the most important expansion direction because it can substantially increase the addressable operating radius beyond individual industrial clusters. The 2026 national policy framework explicitly encourages charging and swapping infrastructure along national expressways, ordinary trunk roads, ports, mines, factories and logistics hubs, and identifies major cross-regional freight corridors as priority areas for new-energy heavy truck deployment. This creates opportunities for station operators to connect previously isolated regional projects into larger transport-energy networks.

Regional Insights

China is the dominant commercial market for heavy truck battery swap station operation and currently has the most developed ecosystem of standardized battery-swapping heavy trucks, operating stations and integrated battery-service models. Commercial deployment is concentrated in regions with intensive bulk freight and industrial transportation, including Inner Mongolia, Hebei, Shanxi, Xinjiang, the Yangtze River Delta and major port and industrial clusters. The geographic structure is gradually changing from resource-producing regions and closed industrial transport loops toward national logistics corridors. Shanghai Qiyuan Green Power Technology Co., Ltd. reports operations across 31 provincial-level regions and more than 100 trunk network groups, illustrating this transition. QIJI Energy's network had expanded across 26 provinces by the end of 2025 and covered key nodes on major expressways, further strengthening long-distance network development. Other regions globally remain at a much earlier

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commercialization stage. Europe, North America and Japan continue to emphasize high-power and megawatt charging for heavy-duty trucks, while standardized large-scale battery swapping has not yet developed an operating network comparable with China. As a result, near-term Heavy Truck Swap Station Operation revenue and infrastructure expansion remain strongly concentrated in the Chinese market.

Competitive Landscape Analysis

The competitive landscape is relatively concentrated around a limited number of operators with access to vehicles, batteries, station technology, capital and major freight customers. The confirmed competitive set includes Shanghai Qiyuan Green Power Technology Co., Ltd., QIJI Energy Technology Co., Ltd., GCL Energy Technology Co.,Ltd., Soland Energy Technology Co., Ltd., Shanghai GreenHub Energy Technology Co., Ltd., Shanghai Enneagon Energy Technology Co., Ltd. and SANY Automobile Manufacturing Co., Ltd. Shanghai Qiyuan Green Power Technology Co., Ltd. has established the broadest disclosed operating footprint among the confirmed participants, combining station network operation, battery-bank services, battery systems and integrated energy management. QIJI Energy is rapidly building a standardized trunk-network model supported by CATL's battery technology and ecosystem partnerships, with more than 300 stations already established by the end of 2025 and a substantially larger 2026 network plan. GCL Energy Technology Co.,Ltd. combines station development, swap operation, intelligent maintenance and battery operation management, while Shanghai GreenHub Energy Technology Co., Ltd. emphasizes modular equipment, station investment and self-built plus franchise network models. SANY Automobile Manufacturing Co., Ltd. integrates heavy truck sales with battery swap station solutions and offers station purchase, leasing and operator-managed models. Future competition is likely to focus less on individual station equipment and more on network density, standardized vehicle compatibility, battery asset efficiency, station utilization, electricity procurement, safety management and the ability to secure long-term freight traffic.

Report Scope

This report studies the global Heavy Truck Swap Station Operation demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Heavy

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Truck Swap Station Operation, and provides market size (US$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Heavy Truck Swap Station Operation that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Heavy Truck Swap Station Operation total market, 2021-2032, (USD Million)

Global Heavy Truck Swap Station Operation total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Heavy Truck Swap Station Operation total market, key domestic companies, and share, (USD Million)

Global Heavy Truck Swap Station Operation revenue by player, revenue and market share 2021-2026, (USD Million)

Global Heavy Truck Swap Station Operation total market by Operation Model Types, CAGR, 2021-2032, (USD Million)

Global Heavy Truck Swap Station Operation total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Heavy Truck Swap Station Operation market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Shanghai Qiyuan Green Power Technology Co., Ltd., QIJI Energy Technology Co., Ltd., GCL Energy Technology Co.,Ltd., Soland Energy Technology Co., Ltd., Shanghai GreenHub Energy Technology Co., Ltd., Shanghai Enneagon Energy Technology Co., Ltd., SANY Automobile Manufacturing Co., Ltd., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

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Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Heavy Truck Swap Station Operation market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), by player, by regions, by Operation Model Types, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Heavy Truck Swap Station Operation Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Heavy Truck Swap Station Operation Market, Segmentation by Operation Model Types:

Asset-Owned Self-Operation

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Entrusted Third-Party Operation

Joint Investment and Cooperative Operation

Global Heavy Truck Swap Station Operation Market, Segmentation by Daily Swap Service Capacity Types:

Up to 50 Swaps per Day

51–100 Swaps per Day

Above 100 Swaps per Day

Global Heavy Truck Swap Station Operation Market, Segmentation by Operation Service Scope Types:

Basic Station Operation Services

Integrated Station and Battery Management Services

Full-Service Energy and Asset Management

Global Heavy Truck Swap Station Operation Market, Segmentation by Application:

Mining and Quarry Transportation

Steel Mill and Industrial Park Logistics

Port Drayage and Short-Haul Logistics

Highway Trunk Freight Transportation

Others

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Companies Profiled:

Shanghai Qiyuan Green Power Technology Co., Ltd.

QIJI Energy Technology Co., Ltd.

GCL Energy Technology Co.,Ltd.

Soland Energy Technology Co., Ltd.

Shanghai GreenHub Energy Technology Co., Ltd.

Shanghai Enneagon Energy Technology Co., Ltd.

SANY Automobile Manufacturing Co., Ltd.

Key Questions Answered

1. How big is the global Heavy Truck Swap Station Operation market?
2. What is the demand of the global Heavy Truck Swap Station Operation market?
3. What is the year over year growth of the global Heavy Truck Swap Station Operation market?
4. What is the total value of the global Heavy Truck Swap Station Operation market?
5. Who are the Major Players in the global Heavy Truck Swap Station Operation market?
6. What are the growth factors driving the market demand?

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