



— NEXXWORKS WHITEPAPER

One robot per **hour**

How China's robotic economy went from prototype to production, and why watching from Europe is the most expensive seat in the house.

A nexxworks whitepaper, inspired by the thinking of **Pascal Coppins** and **Dado Van Peteghem**.

THE ARGUMENT IN THIRTY SECONDS

The last five years were about the automation of the brain. The next five are about the automation of the body. This shift, **physical AI**, is unfolding faster than anyone predicted, and it is unfolding in one place above all: **China**.

Chinese manufacturers already install more than half of the world's industrial robots and ship around 90 percent of the world's humanoid robots.

Production lines are accelerating from one robot per day toward **one robot per hour**.

Europe is about to make the same mistake it made with solar panels, batteries and electric vehicles, dismissing the Chinese version as cheap until, suddenly, it is better. This paper explains what is actually happening, what it means for your operations and your people, and the five moves every industrial leader should make now.



01 From the brain to the body

Let me start with the sentence that reframes everything: **AI is getting a body.**

Since 2022, business has been obsessed with the automation of the brain. Language models that write, reason, code and plan. That revolution is real, but it lives inside a screen. The next wave takes that intelligence and puts it into machines that walk through your factory, pick up a component, load a truck and clean a hospital corridor.

NVIDIA's Jensen Huang calls it physical AI, and at CES in January 2026 he told the world that the ChatGPT moment for general robotics is just around the corner. He is being conservative. In China, that moment already happened, in front of hundreds of millions of viewers.



The ChatGPT moment for general robotics is **just around the corner.**

JENSEN HUANG, NVIDIA · CES 2026

At the Spring Festival Gala, China's Super Bowl, a troupe of Unitree humanoid robots performed a synchronized folk dance, twirling handkerchiefs, live on the biggest broadcast on the planet. A few months later, humanoids ran a half marathon through Beijing alongside human runners. In August, Beijing hosted the world's first Humanoid Robot Games.

Spectacle? Absolutely. But spectacle with a message: this technology has left the lab.



And behind the spectacle sits the number that should be on every boardroom agenda. Chinese robot makers report production lines accelerating from one robot per day to one robot per hour. Read that again. This is a manufacturing ramp, and manufacturing ramps are the one thing China does better than anyone on earth.

1 per hour

The pace Chinese lines are ramping toward, up from one robot per *day*.

02 Why China, why now

Three forces converge to make China the center of gravity of the robotic economy. None of them is temporary.

FORCE 01 The hardware advantage

A humanoid robot is a supply chain wearing a body: actuators, reducers, sensors, batteries, casings. In the Pearl River Delta, around Shenzhen and Guangzhou, every one of those components is produced within a one-hour drive. Where a European builder waits weeks for a custom part, a Chinese engineer picks it up after lunch. Morgan Stanley mapped the global humanoid supply chain and found the clear majority of key players are Chinese. This is why Unitree can sell an entry-level humanoid, the R1, for under 6,000 dollars. A moonshot is becoming a line item.

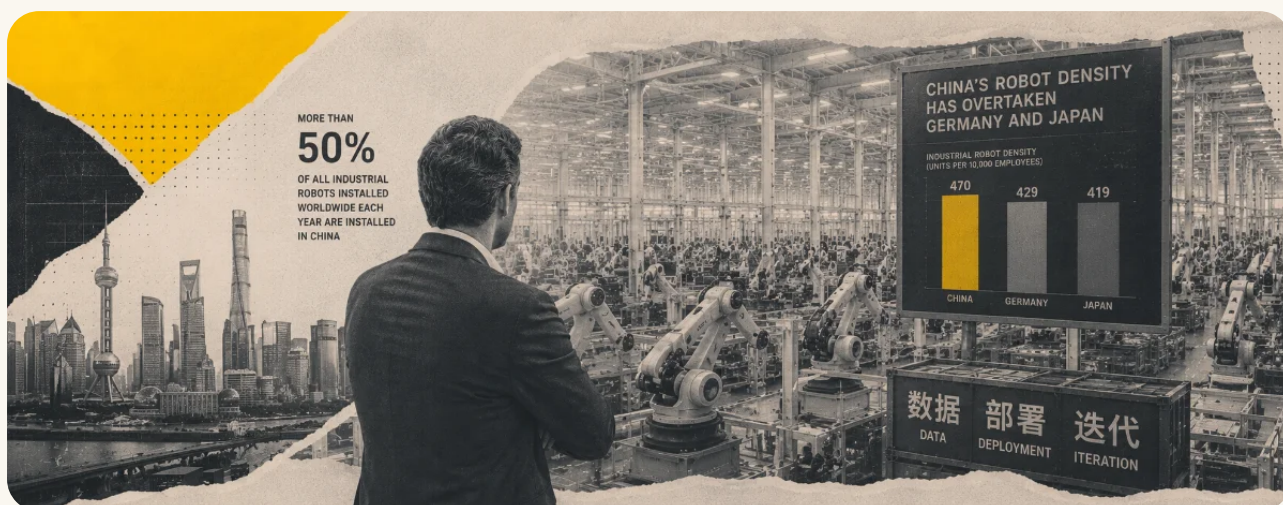
FORCE 02 The scale of adoption

China builds robots, and it buys them at scale too. More than half of all industrial robots installed worldwide each year are installed in China, and China's robot density has overtaken Germany and Japan, the countries that invented modern industrial automation. This matters because robots improve the way AI models do: through data and deployment. Every warehouse running Chinese robots today is a training ground for the next generation.

FORCE 03 The state as accelerator

Beijing has declared embodied intelligence a national priority, set explicit goals for mass production of humanoids and world-leading capability by 2027, and backed it with a state venture fund measured in the hundreds of billions of yuan. Cities compete with their own subsidies: Beijing builds the brain, with labs like BAAI and startups like Galbot and Moonshot AI, while Shenzhen and Guangzhou build the body. When Chinese industrial policy, private capital and consumer enthusiasm point in the same direction, the result has historically been the same: solar, batteries, EVs, drones. Now robots.

THE QUIET DRIVER



And underneath it all sits the quiet driver nobody mentions in the keynotes: **demographics**. China's workforce is shrinking and aging. For Beijing, the robotic economy is not a tech fad. It is a national survival strategy. That is why it will not slow down.

Sound familiar? Europe faces the same demographic math, with structural labor shortages across manufacturing, logistics and care. The difference is that China treats robots as the answer, while Europe still treats them as a debate.

~90%

Of the world's humanoid robots shipped from China, by most estimates.

>50%

Of all industrial robots installed worldwide each year are installed in China.

<\$6k

The price of Unitree's entry-level R1 humanoid. A moonshot becomes a line item.

03 What it looks like on the ground

Forget renders and demo videos. Here is what is already operational.



Dark factories

Xiaomi runs a smartphone plant outside Beijing that operates around the clock with almost no humans on the line, producing a phone roughly every second. The lights can stay off, because robots do not need to see. Lights-out manufacturing has moved from concept to competitive baseline.



Humanoids with jobs

UBTECH's Walker S robots are being tested and deployed in the factories of BYD, Foxconn and major carmakers, doing quality inspection and logistics. The latest generation swaps its own battery, which means the workforce that never sleeps is no longer a metaphor.



Robotaxis at scale

In Wuhan, Guangzhou and Shenzhen, fully driverless robotaxis from Baidu's Apollo Go and Pony.ai are a daily reality rather than a pilot. Hail one with an app, no safety driver, no steering hands.



The sky as infrastructure

In Guangzhou, EHang became the world's first company certified to fly passengers in pilotless air taxis, the spearhead of what China calls the low-altitude economy. Flying vehicles sound like science fiction until you watch one take off on a Tuesday.



The quiet conquest

While humanoids get the headlines, Chinese robots already dominate less glamorous categories: DJI owns roughly 70 percent of the global drone market, and service robots from Pudu and Keenon are serving food and delivering parcels in European hotels and restaurants right now. The invasion already happened, politely, one delivery robot at a time.

This is the pattern Pascal Coppens has described for years: what happens in China does not stay in China. It ships.

04 The mistake Europe is about to make (again)

Europe has seen this movie three times. Chinese solar panels were cheap junk until they owned the market. Chinese batteries were low quality until CATL and BYD set the global standard. Chinese EVs were no threat until they arrived in European showrooms with better software at lower prices.

Each time, the mistake was the same: assuming China competes on price forever. In reality it enters on price and then climbs, relentlessly, on quality. Robotics is next, and the window is shorter this time because the learning loops are faster.

SOLAR

"Cheap junk," until China owned the market.

BATTERIES

"Low quality," until CATL and BYD set the global standard.

EVS

"No threat," until they arrived with better software at lower prices.

Will you be a fast follower, or a late victim?

Humanoid robots already work. The real question is who deploys them first. Fast followers go and see the future while it is being built, then adopt what works. Late victims wait for it to be "proven," which usually means waiting until a competitor proves it on them.

Europe is not starting from zero

Dado Van Peteghem tracks a serious European humanoid scene: Germany's NEURA Robotics raised a record round on the back of roughly a billion euros in orders, Norwegian-born 1X is putting its OpenAI-backed NEO robot into homes, France's Wandercraft builds industrial humanoids with Renault as investor and first customer, and Hugging Face acquired Pollen Robotics to open-source robot AI for everyone. The talent and the technology exist on this continent. What Europe lacks is not inventors. It is **deployment**: customers willing to put these machines to work at scale, the way China does by default.

"This is hype, the demos are staged."

Partly true. But the useful signal is deployments: robots with jobs, order books and paying customers. Judge those.

"Europe is different: certification, works councils."

Also true, and all the more reason to start earlier. If your deployment cycle is structurally longer, every month of waiting is a self-imposed handicap.

Play it forward five years. The new competition pits robotic productivity against robotic productivity, and the side that deployed earlier and learned faster wins on quality, speed and price at once.

There is a second, more human risk: getting the workforce story wrong. The automation of the body will reshape jobs the way the automation of the brain is reshaping office work. Companies that treat this purely as a headcount exercise will repeat the error of the AI efficiency wave. The winners will redesign work, not just remove it. That is Dado Van Peteghem's lens, and it is the difference between an automation strategy and a future-of-work strategy.

05 Five moves for industrial leaders

1 Go calibrate your reality

You cannot strategize about a revolution you have never seen. Walk a dark factory. Watch a humanoid swap its own battery. Ride a robotaxi. Leaders who have physically stood in China's robotic economy make different decisions, because their sense of realistic timelines gets rebuilt on the spot.

2 Map your exposure at the new price point

Every process has an automation threshold, and that threshold just moved. When a humanoid costs less than a forklift and works three shifts, tasks that were never worth automating suddenly are, and not only in factories: warehouses, hospitals, care homes and hotels sit on the same curve. Which of your processes become automatable at 6,000 dollars? At 20,000?

3 Rerun the business case with collapsing payback periods

European labor costs are high and rising; robot costs are falling fast on a curve that resembles solar panels. Business cases rejected in 2023 will be obvious in 2027. Build a rolling review so you spot the crossover before your competitor does.

4 Redesign work, do not just remove it

Decide today which human capabilities you want to amplify: judgment, maintenance, orchestration, customer contact, creativity. Start reskilling toward robot-adjacent roles before the deployment, not after the layoffs. The scarcest profile of 2030 is the person who can manage a mixed team of humans and machines.

5 Choose your position in the new supply chain

Chinese robotics will reach your market whether you engage or not. Buy and deploy early, from Chinese makers or Europe's own emerging champions who need exactly your order book; partner and integrate; or compete head-on in a niche where Europe is genuinely strong, like precision machinery and industrial software. Doing nothing is itself a decision, and its name is disruption.

06 The future is already scheduled

The automation of the brain changed what we do behind screens. The automation of the body will change everything else: factories, warehouses, hospitals, streets, skies. That second wave has a capital, and it is not in Silicon Valley.

THE LAST FIVE YEARS

The automation of the brain.

THE NEXT FIVE

The automation of the body.

The good news for European leaders is that this story is still being written, and fast followers do extremely well in it, but only if they move while "fast" is still available. The robots are ramping from one per day to one per hour. Your strategy should probably ramp too.

The future of work is being assembled right now, in Beijing, Shenzhen and Guangzhou.

– THE BOTTOM LINE

Go see it before it ships.

nexxworks presents

China's Robotic Economy Tour



Beijing, Shenzhen and Guangzhou · November 15–20. A small group of executives goes inside the companies building physical AI, moderated by China expert **Pascal Coppens** and future-of-work expert **Dado Van Peteghem**.

Because reading about one robot per hour is one thing. Watching it roll off the line changes how you lead.

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The ChatGPT moment of robots

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