



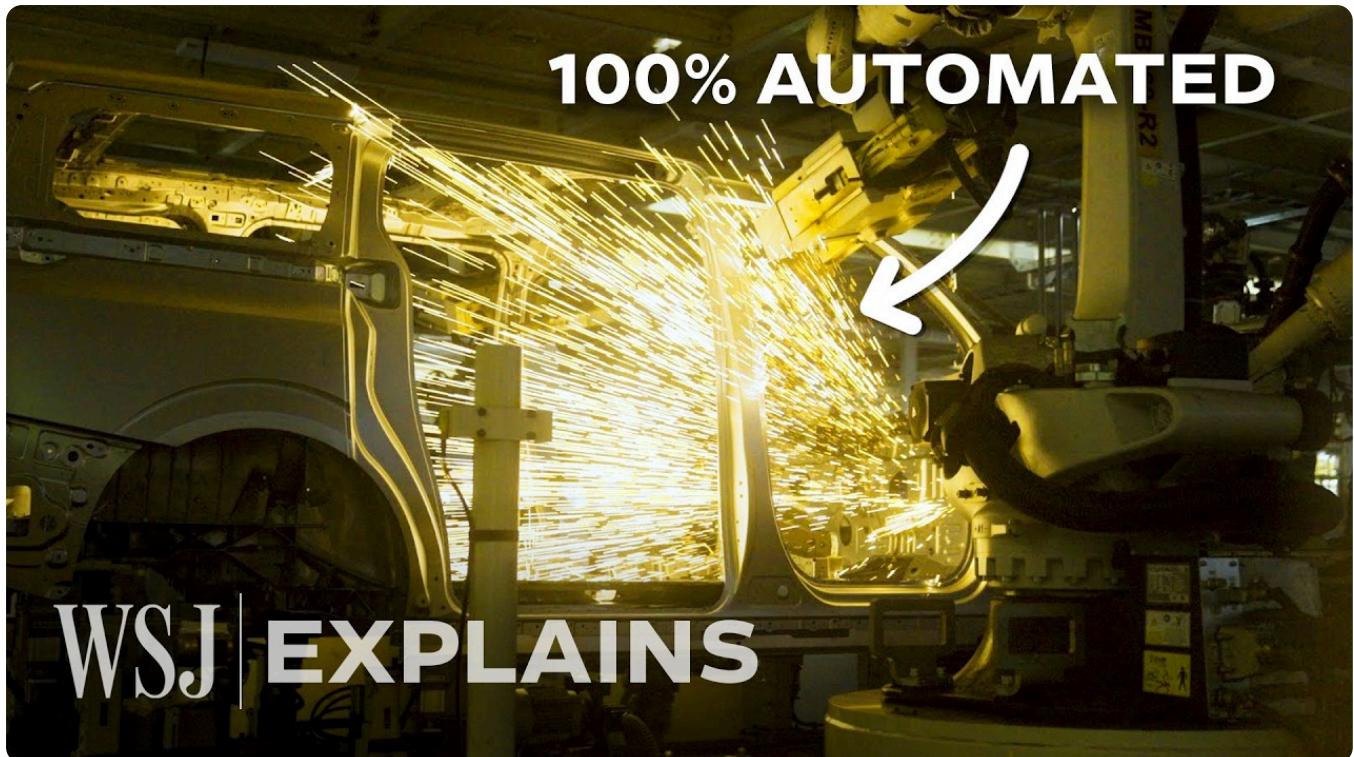
China's Dark Factories: So Automated, They Don't Need Lights | WSJ

【华尔街日报报道中国智能工厂：自动化程度高到无需开灯 20250719】

Summary: In a car factory in China, the lights are dim, and no workers are in sight—hundreds of robots produce electric vehicles around the clock without interruption. This is a "dark factory"—a highly automated, nearly unmanned area of the plant that, in theory, can operate with the lights completely off. These factories are part of China's strategy to dominate the electric vehicle market through hyper-automation. But the fierce trade war between China and the U.S. has raised a key question: who will buy these new cars? For decades, China was known as the "world's factory" due to its cheap labor, but now its economy is undergoing a transformation.

摘要：在中国的一家汽车工厂里，灯光昏暗，看不见工人，数百台机器人24小时不间断地生产电动汽车。这就是“黑灯工厂”——工厂中高度自动化、几乎无人操作的区域，理论上可以完全关闭灯光。这类工厂是中国通过超级自动化主导电动汽车市场的战略之一。但中美激烈的贸易战引发了一个关键问题：谁来购买这些新车？几十年来，中国因廉价劳动力被称为“世界工厂”，但如今经济正在转型。





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▶ With lights dimmed and no workers in sight, this car factory in China uses hundreds of robots to churn out dozens of electric vehicles an hour 24/7.

灯光昏暗，看不见工人，这家中国汽车工厂使用数百台机器人24小时不间断地每小时生产数十辆电动汽车。

▶ This is a dark factory, an area of the plant so automated and with so little human presence that in theory the lights could be completely shut off.

这是一座“黑灯工厂”，工厂的这一区域高度自动化，几乎无人操作，理论上可以完全关闭灯光。

▶ Factories like this one are part of China's bid to use hyper automation to dominate the electric vehicle or EV market.

这类工厂是中国通过超级自动化主导电动汽车市场的战略之一。

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▶ But the furious trade war between Washington and Beijing raises a key question, who is going to buy all these new cars?

但中美激烈的贸易战引发了一个关键问题：谁来购买这些新车？

▶ For decades, the abundance of cheap labor explained why China was seen as the world's factory floor, but the economy is changing.

几十年来，中国因廉价劳动力被称为“世界工厂”，但如今经济正在转型。

▶ The labor costs had been going up in China for many years.

中国的劳动力成本多年来一直在上升。

▶ I think it happened faster than many people in the West expected.

我认为这一变化比许多西方人预期的更快。

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▶ And so if you're a factory owner, you wanna find a way to blunt the impact of that and automation is one very obvious way.

因此，如果你是工厂主，你会想办法缓解这一影响，而自动化是一个非常明显的解决方案。

▶ [记者] Rapid advancements in robotization has helped create what is now known as dark factories.

机器人技术的快速发展催生了如今的“黑灯工厂”。

▶ This is ZEEKR, a Chinese luxury EV maker founded in 2021, whose cars cost up to \$125,000 a piece.

这是极氪，一家成立于2021年的中国豪华电动汽车制造商，其汽车售价高达12.5万美元一辆。

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- In its flagship factory in northeastern China, the automaker can already produce up to 300,000 cars a year or more than 800 cars a day.

在中国东北的旗舰工厂，该汽车制造商已能年产30万辆汽车，即每天800多辆。

- For comparison, Tesla has similar production levels, but it took more than a decade to achieve this volume.

相比之下，特斯拉的产量水平相近，但花了十多年才达到这一规模。

- For ZEEKR, robotization has a double advantage.

对极氪而言，机器人化有双重优势。

- Some tasks still require a human touch, such as the meticulous assembly of the cables that run throughout the car.

某些任务仍需要人工操作，比如汽车内部线缆的精细组装。

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- Workers also go into the factories to perform tasks like robot maintenance.

工人也会进入工厂执行机器人维护等任务。

- The company's ambition is to keep automating, to deliver its cars to customers even faster.

该公司的目标是继续推进自动化，以更快地将汽车交付给客户。

- In China, ZEEKR is not an outlier in automation.

在中国，极氪并非自动化领域的特例。

- According to the International Federation of Robotics in 2023, every other industrial robot installed in the world happened in China.

根据国际机器人联合会2023年的数据，全球每两台工业机器人中就有一台安装在中国。

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- The country's levels of robotization have grown sevenfold since 2015 when President Xi Jinping introduced a Made in China 2025 initiative to transform its image from the world's

factory into an innovative manufacturing powerhouse.

自2015年习近平主席提出“中国制造2025”计划以来，中国的机器人化水平增长了七倍，旨在将中国从“世界工厂”转变为创新型制造强国。

And the aims are to be able to produce more of what China needs at home and to get to a level of technological advancement where they don't need to rely on the US and Western countries anymore for inputs or to reduce that reliance as much as possible, and even to be able to produce enough that they can export.

其目标是能够在国内生产更多中国所需的产品，并达到技术进步的水平，减少甚至摆脱对美国和西方国家的依赖，甚至能够生产足够多的产品用于出口。

And part of that was to have robotics play a larger role in the Chinese economy.

其中一部分是让机器人技术在中国经济中发挥更大作用。

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[记者] Some American automakers believe China's widening EV lead boosted by cheap state loans and subsidies, poses an existential threat to the industry.

一些美国汽车制造商认为，中国在廉价国家贷款和补贴的推动下扩大电动汽车领先优势，对该行业构成生存威胁。

When you have a country like China where much of the auto industry is increasingly automated, the sky is the limit in terms of what they can produce.

当一个像中国这样的国家，其大部分汽车行业日益自动化时，他们的生产能力几乎没有上限。

And if that means a flood of EVs or other vehicles on global markets, that is going to have the effect of just pulling down prices, and that's gonna hurt Western automakers that are trying to compete with these.

如果这意味着全球市场上电动汽车或其他车辆的泛滥，这将导致价格下跌，从而伤害试图与之竞争的西方汽车制造商。

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[记者] Unlike their Chinese rivals, companies like Ford and GM have scaled back ambitious EV expansion plans hampered by high battery costs and the slow rollouts of EV

chargers.

与中国竞争对手不同，福特和通用等公司因电池成本高和电动汽车充电桩推广缓慢而缩减了雄心勃勃的电动汽车扩张计划。

④ Staffing costs and labor laws in the West are another disadvantage the US faces.

西方的人力成本与劳动法是美国面临的另一劣势。

④ China has a lot less in the way of labor regulation than many Western countries.

中国的劳动法规比许多西方国家少得多。

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④ They don't have labor unions to deal with in the same way, so there are fewer impediments to automating.

他们无需以同样的方式应对工会，因此自动化的障碍更少。

④ [记者] But China's EV landscape is a crowded space and fast robotization makes this competition even tighter.

但中国的电动汽车市场竞争激烈，快速机器人化使竞争更加激烈。

④ Chinese companies already turn out more EVs than all other car makers in the world combined.

中国公司生产的电动汽车已超过全球其他所有汽车制造商的总和。

④ But Western concerns about Beijing's EV expansion have so far largely kept Chinese brands out of their markets.

但西方对中国电动汽车扩张的担忧迄今在很大程度上将中国品牌挡在其市场之外。

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④ Countries that have friendlier relations with China, like Brazil, countries in the Middle East, in Africa, in Southeast Asia, are worried as well about their own domestic industries and don't want to see a flood of Chinese products undermine those industries.

与中国关系更友好的国家，如巴西、中东、非洲和东南亚国家，也担心本国产业受到冲击，不希望看到中国产品泛滥破坏这些产业。

► If you have automation enabling China to go even faster and produce even more of this stuff, then this political problem becomes perhaps even greater.

如果自动化使中国能够更快地生产更多这类产品，那么这一政治问题可能会变得更加严重。

► [记者] As a result, most of these cars are sold inside China, making over capacity a huge issue for the industry.

因此，这些汽车大部分在中国国内销售，产能过剩成为该行业的一大问题。

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► But this doesn't dent ZEEKR's confidence in China's capacity to consume.

但这并未削弱极氪对中国消费能力的信心。

