

Confidential

Enterprise Large Model AI Application Solution Market in China *Independent Industry Report*

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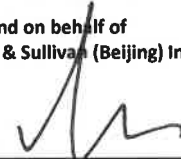

Name: Charles Lau
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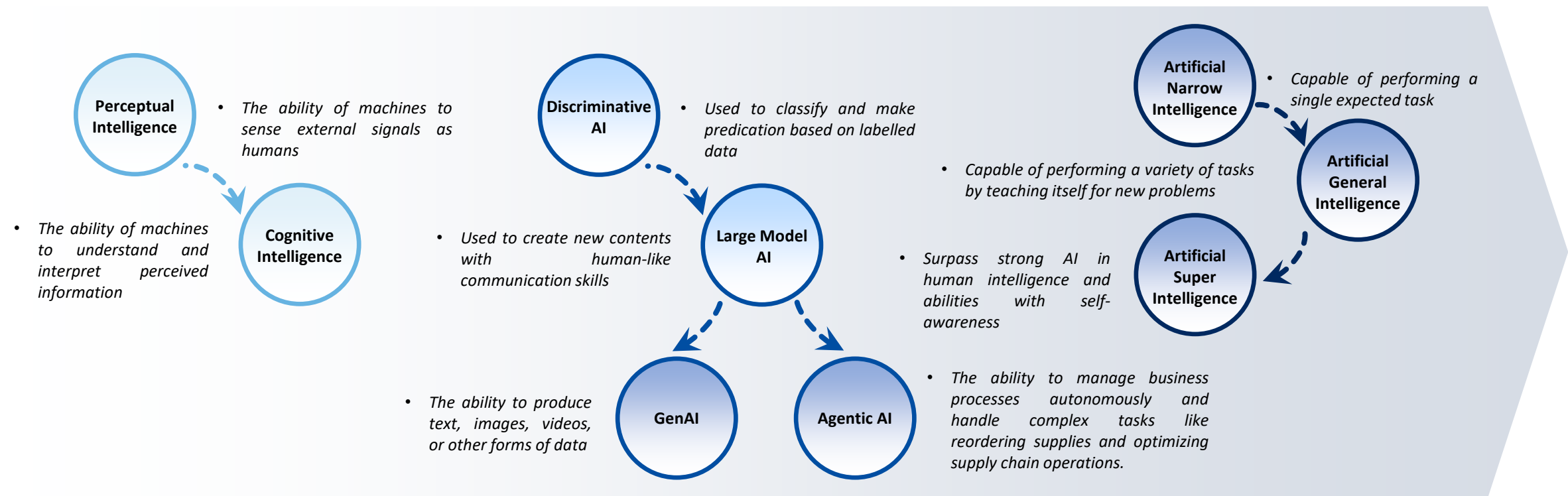


Overview of Enterprise AI Application Solution Market in China

Development of AI Technology

Key Findings

- AI is a branch of computer science that centers around simulating human intelligence by enabling machines to mimic the perceptual and cognitive functions normally associated with the human mind, and represents a revolutionary technology that makes profound impacts on the development of mankind by integrating into extensive aspects of daily life.
- AI has undergone significant evolution since its inception, with continuous advancements expanding its capabilities — ranging from discriminative AI to large model AI, and from artificial narrow intelligence (ANI) to the emerging potential of artificial general intelligence (AGI) and the ultimate goal of artificial superintelligence (ASI).



Overview of Enterprise AI Application Solution Market in China

Definition of AI Solution and Enterprise AI Application Solution



Definition AI Solution and Enterprise AI Application Solution

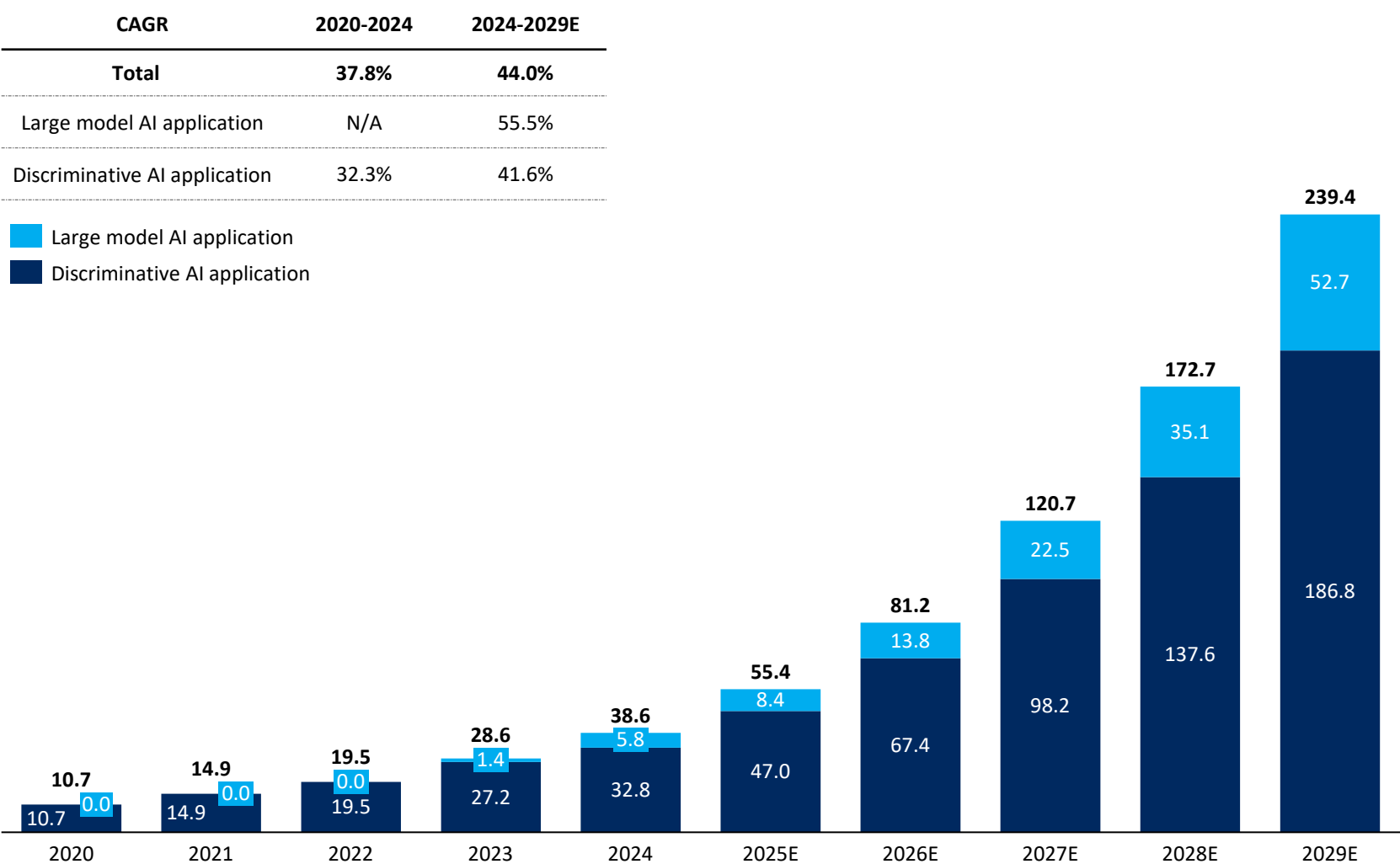
- As AI becomes increasingly integrated into the workplace, it is reshaping industries, driving disruptive innovation, and realizing substantial productivity gains. In this context, AI application solutions have become vital tools for organizations of all sizes, helping them tackle unique challenges and achieve strategic objectives.
- Enterprise AI application solutions refer to a wide range of solutions that integrate AI algorithms into hardware, software and services that provided to enterprises. Enterprise AI application solutions seamlessly integrate AI into enterprise systems, ensuring scalability and compatibility with existing infrastructure, while delivering tangible value through the resolution of complex, industry-specific problems and supporting long-term business growth.

Classification of AI Solution			
By industry	Retail Retail industry including both online and offline retailers adopts AI solutions to improve customers' shopping experience and to improve cost management	Financial Service Financial service industry adopts AI solutions to improve work efficiency, cost management and clients service experience	Others Others include manufacturing industry, healthcare industry, internet industry and government organizations that are undergoing digital transformations
By underlying technology	Discriminative Discriminative AI solutions focus on learning the mapping relationship between input features and target labels by modeling conditional probability distributions, with their core objective being to distinguish data categories or predict specific outputs, typically implemented through classification/regression models under a supervised learning framework.	Large Model Within large model AI solutions, the generative branch captures the intrinsic structure of data by modeling joint probability distributions, enabling the synthesis of new samples from underlying feature combinations; the agentic branch emphasizes constructing autonomous decision systems capable of multi-step task planning, execution, and iterative optimization, with its technical essence lying in dynamic environment perception, goal decomposition, and feedback-driven action chain construction.	
By product or service provision	Software Software is the carrier of AI models that embodies the value of AI solutions	Hardware Hardware is the infrastructure to develop AI models or the complementary equipment that is embedded with AI models	Service Service is the labor power engaged while providing implementation or maintenance service to customers

Overview of Enterprise AI Application Solution Market in China

Market Size of Enterprise AI Application Solution Market in China

Market Size of Enterprise AI Application Solution Market in China, in terms of revenue
RMB Billion, 2020-2029E



Key Findings

- Taking advantage of the proliferation of AI and the trend of ongoing digital transformation, the market size of enterprise AI application solution market, in terms of revenue, has grown from RMB10.7 billion in 2020 to RMB38.6 billion in 2024, representing a CAGR of 37.8% from 2020 to 2024. Looking forward, driven by wider adoption of enterprise AI application solutions across diverse industries and continual innovations in AI technologies, the market size of enterprise AI application solution market in China, in terms of revenue, is expected to reach RMB239.4 billion in 2029 with a CAGR of 44.0% from 2024 to 2029.
- The enterprise AI application solutions market in China remains relatively fragmented with over 200 market players in the market. The top five players collectively accounted for over 30% of the market by revenue in 2024, with each generating more than RMB1.0 billion in revenue. The Company is not considered a leading player in the market.

Overview of Enterprise AI Application Solution Market in China

Key Differences Between Large Model AI and Discriminative AI



The Evolution of AI From Discriminative AI to Large Model AI

➤ AI has undergone significant technological evolution over the decades, advancing through distinct phases — from early rule-based systems to discriminative AI powered by machine learning and deep learning, and now to large model AI, which leverages advanced foundation models alongside techniques such as fine-tuning and model distillation. As a result, enterprise AI application solutions can be further categorized into enterprise discriminative AI application solutions and enterprise large model AI application solutions. While discriminative AI continues to widely adopted across many applications, large model AI is rapidly emerging as a transformative force with vast potential for enterprises. The key difference between large model AI application solutions and traditional discriminative AI application solutions lies in the perspectives as followings:

	Large model AI Application Solutions	Traditional Discriminative AI Application Solutions
Key function	Generative AI: Perform a wide range of tasks, including generating original content such as text, images, video, audio, and software code, as well as handling text-based processing tasks like summarization, translation, and sentiment analysis in response to user prompts or requests	Focus on classifying data into predefined categories or predict numerical values based on input data, and primarily used for image and object detection, speech and audio processing and pattern recognition, among others
Output	- Agentic AI: Exhibit a level of autonomy, decision-making capability and adaptability that allows them to take actions and interact with various and changing situations for the given goals - Contents in different media forms, as well as actions responded to given tasks or external environments	Often discrete labels (e.g., spam/not spam, cat/dog), numerical predictions (e.g., fraud possibility)
Underlying algorithms	Primarily based on Transformer architecture with billions of parameters, and reinforcement learning where a model make decisions by interacting with an environment to maximize cumulative rewards	Often utilize various models like logistic regression, support vector machines, decision trees, random forests, and smaller neural networks.
Training data	- Massive amounts of unlabeled data especially in the pre-trained stage, and labeled data in the SFT stage - Text/image/audio/video/code generation tools and AI agents, among others	Large amounts of labelled data where the correct output for each input is known
Examples	Both of FastData enterprise data intelligence solution and FastAGI enterprise AI solution fall under large model AI application solution. FastData enterprise data intelligence solution prepares data for AI, delivering tokenized data output for training and finetuning large models and agentic AI applications. FastAGI enterprise AI solution acts as a one-stop solution enabling full processes from knowledge base development and model management to the incubation of AI agents, simplifying the complexities of AI deployment to empower enterprises across industries to optimize decision-making, enhance operational efficiency and boost productivity.	Image recognition, audio processing, fraud detection, and among others

Overview of Enterprise AI Application Solution Market in China

Drivers and Trends of Enterprise AI Application Solution Market in China

1	Growing demand	With the rapid development of the digital economy, enterprise demand for AI products and application solutions has grown significantly, especially in the fields of smart manufacturing, smart cities, healthcare, etc. The application scenarios of AI technology continue to expand. Enterprise customers have been increasingly adopting AI-driven solutions to address business challenges such as operational optimization, cost reduction, etc. AI application solutions have become a key factor for enterprises to automate workflows, enhance customer experience, and enable data-driven decision making, and the continuously growing demand from enterprises has directly contributed to the booming market.
2	Continuous construction of digital infrastructure	Advanced digital infrastructure, such as 5G networks and cloud platforms, provides a solid foundation for the large-scale deployment of enterprise AI application solutions. In recent years, China has made significant progress in digital infrastructure construction, and the country's "new infrastructure" policy has accelerated investment in data centers, industrial internet, and AI chip development. These advances have lowered computing costs, reduced deployment barriers, and enabled real-time processing of complex data sets, further expanding the accessibility and applicability of enterprise AI application solutions in industries such as manufacturing, logistics, and finance.
3	Favorable policy supports	The Chinese government attaches great importance to the development of artificial intelligence, and has constructed a systematic policy support system from the central to local governments, which provides a strong policy driving force for enterprise AI application solutions market in China. For example, in the Implementing Opinions on Promoting the Innovative Development of Future Industries (《关于推动未来产业创新发展的实施意见》) issued by the Ministry of Industry and Information Technology and other seven departments, it is pointed out that artificial intelligence, advanced computing and other technologies should be utilized to accurately identify and cultivate high-potential future industries. Another example is that in the 2025 State Council Government Work Report (《2025年国务院政府工作报告》), it is proposed to continuously promote the "AI+" action. Favorable policies not only provide a clear direction for the R&D and application of AI technology, but also reduce the R&D costs of enterprises through special funds, tax incentives and other measures, accelerating the commercialization of AI technology. In summary, the continuous leadership and strategic support of the policy has provided a solid foundation for the development of the enterprise AI application solutions market, and has promoted the widespread application of AI technology in various industries.

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Definition of Enterprise Large Model AI Application Solution



Definition of Enterprise Large Model AI Application Solution

- Based on different technology paths, enterprise AI application solutions can be divided into enterprise large model AI application solutions and enterprise discriminative AI application solutions.
- **Enterprise large model AI application solutions** are designed to seamlessly integrate into the daily workflows of enterprises, ensuring that enterprises can immediately benefit from AI-driven automation, decision-making, and content generation. By providing turnkey solutions that are pre-configured and easy to deploy, these applications reduce the complexity associated with large model AI adoption. Enterprises can quickly leverage large model AI's capabilities to improve operational efficiency and productivity without having to build everything from scratch.
- **Enterprise discriminative AI application solutions** refer to application solutions based on discriminative AI capabilities (e.g., real-time classification, prediction, and anomaly detection systems) that address enterprise-specific decision-making needs, along with the foundational infrastructure required for deploying and maintaining high-precision models, such as low-latency inference engines, continuous model monitoring tools, and domain-specific data annotation platforms, enabling enterprises to optimize operational accuracy, automate rule-based tasks, and enhance risk control capabilities.



Classification of Enterprise AI Application Solution

By Technology Paths

1

Enterprise Large Model AI Application Solution

- Enterprise large model AI application solutions are characterized by their capacity to handle complex, unstructured tasks through generative and agentic capabilities, enabling adaptive problem-solving in dynamic environments. These solutions excel at synthesizing novel insights, simulating hypothetical scenarios, and orchestrating multi-step workflows by leveraging broad contextual understanding derived from pretrained knowledge bases. Unlike discriminative approaches constrained by historical patterns, they demonstrate emergent reasoning abilities to address novel challenges while maintaining human-aligned operational guardrails. Their core advantage lies in unifying content generation, strategic planning, and autonomous task execution within integrated frameworks, supported by continuous learning mechanisms that refine outputs through environmental feedback. This enables enterprises to automate knowledge-intensive processes, explore innovation pathways, and optimize decisions under uncertainty, particularly in domains requiring cognitive flexibility beyond predefined rulesets. The solutions' architecture inherently supports cross-domain generalization while reducing dependency on specialized training data, offering scalable intelligence augmentation across evolving business contexts through configurable abstraction layers and natural language interfaces.

2

Enterprise Discriminative AI Application Solution

- Enterprise discriminative AI application solutions are characterized by their focus on structured decision-making and operational efficiency, leveraging real-time data processing and high-precision models to automate tasks such as fraud detection, quality control, and predictive maintenance. These solutions prioritize accuracy, speed, and reliability in predefined workflows, relying on labeled datasets and optimized inference engines to deliver actionable insights. However, their capabilities are inherently constrained by their dependency on historical data patterns, limiting their adaptability to novel scenarios or creative problem-solving. While effective for rule-based and repeatable processes, they lack the flexibility to generate original content or simulate hypothetical outcomes, restricting their utility to environments where tasks are narrowly defined and outcomes are deterministic.

Overview of Enterprise Large Model AI Application Solution Market in China

Pain Points of Enterprise Large Model AI Application Solution Market in China

- The development of large model AI has been one of the most significant advancements in artificial intelligence in recent years, revolutionizing how enterprises operate, innovate, and engage with customers. With the rise of models like GPT, BERT, and other Transformer-based architectures, large model AI application solutions have emerged as powerful tools for enterprises of all sizes, driving transformation across enterprise operations and enhancing user experiences in diverse applications. In particular, large model AI application solutions not only enable enterprises generate and process various types of content more efficiently, but also more importantly, empower them to make better-informed and more impactful business decisions. While recognizing the transformative potential of large model AI, enterprises often face several challenges and pain points when considering the development and adoption of these applications:

1

Lack of ready-to-use large model AI applications

- Many enterprises, due to the novelty of large model AI, still lack readily available applications that are seamlessly integrated into their daily workflows. The incompatibility among enterprise systems, foundation models and public knowledge capabilities creates integration challenges, which hampers their ability to realize the full potential of large model AI, preventing substantial improvements in operational efficiency and productivity.

2

Challenges in adapting foundation models to meet specific enterprise needs

- High Accuracy and Low Hallucination Rate. Hallucination in AI is when large models generate false, misleading or fabricated responses that is not grounded in their training data or real-world facts, a common problem among foundational models.
- Foundation models lack the capability to understand and handle industry-specific, complex tasks. These foundation models can only provide enterprises with basic functions such as office collaboration and intelligent assistants. These functions offer limited added value and fail to address critical business needs, such as decision-making support and productivity tools, which are essential for corporate operations. To make these models relevant for a particular enterprise, it is crucial to integrate the enterprises' unique data and business logic into a cohesive framework, which must then be incorporated into the training process. This approach allows for the development of large model AI applications tailored to the enterprise, enabling them to accurately interpret and make data-driven decisions based on the enterprises' distinctive business logic and analysis. However, many enterprises struggle to fully leverage foundation models due to limitations in internal development resources and a shortage of AI talent specialized in large model AI, making it challenging to adapt these models to meet their specific needs.

3

Unready data quality for enterprise large model AI application development.

- Today's enterprises deal with massive amounts of data, including documents, images, spreadsheets, technical drawings, complex formulas, often unstructured and scattered in different formats and systems.
- High-quality data is essential for transforming foundational models into enterprise large model AI applications. However, many enterprises face significant challenges in data governance often dealing with incomplete, non-standardized, and inaccurate data, preventing them from achieving effective, unified management of both structured and unstructured data. The inability to manage structured, semi-structured and unstructured data in a unified, high-quality manner hinders the provision of standardized, high-quality training corpora, creating substantial barriers to deploying agentic AI applications.

4

Demand for optimized computing power infrastructure to support large model AI applications.

- To support the high computational requirement of large model AI applications, enterprises are driving demand for optimized computing power services that can enhance efficiency and reduce infrastructure costs.

Overview of Enterprise Large Model AI Application Solution Market in China

Value Proposition of Enterprise Large Model AI Application Solution Market in China

- In order to address the aforementioned pain points faced by enterprises during the development and adoption of large model AI technologies, enterprise large model AI application solutions are offered. Enterprise large model AI application solutions, as a subset of enterprise AI solutions, refer to applications built on large model AI capabilities, along with the supporting services necessary when delivering integrated large model AI solutions including model development services, data platform services, and computing services to help enterprises to better utilize enterprise large model AI applications to realize cost reduction and efficiency increases. The benefits of these components of enterprise large model AI application solutions are set out below:

1

2

3

4

Enterprise Large Model AI applications

- Large Model AI applications are designed to seamlessly integrate into the daily workflows of enterprises, ensuring that enterprises can immediately benefit from AI-driven automation, decision-making, and content generation. By providing turnkey solutions that are pre-configured and easy to deploy, these applications reduce the complexity associated with large model AI adoption. Enterprises can quickly leverage large model AI's capabilities to improve operational efficiency and productivity without having to build everything from scratch.

Model development services

- Model development services specialize in fine-tuning and customizing foundational models to suit the unique requirements of an enterprise, ensuring that the AI is tailored to handle industry-specific tasks and leverage business logic. By integrating an enterprise's proprietary data and domain expertise into the training process, model development services can help create large model AI models that understand and process the complex, context-specific information that is crucial for the enterprise. Supervised Fine-Tuning (SFT) and reinforcement learning are two commonly used techniques in model development services. SFT adapts a pre-trained large model to a specific downstream task using labeled data. While it is a straightforward and effective method for aligning a foundation model with task-specific outputs, it often requires a substantial amount of labeled data and significant computational resources. Reinforcement learning is an interdisciplinary area of machine learning and optimal control concerned with how an intelligent agent should take actions in a dynamic environment in order to maximize a reward signal. It's often used when there is no direct labeling, and the model would explore to discover an optimal strategy.

Data platform services

- Data platform services provide comprehensive solutions for data collection, storage, processing, and management, enabling enterprises to govern their data from multiple sources in a unified, high-quality manner. More importantly, data platform services play a crucial role in preparing data for large model AI model training by tokenizing the organized data. Tokenization involves breaking down the raw data into smaller, manageable units — tokens — that can be effectively processed by the AI model. These tokens represent discrete pieces of information, such as words, phrases, or symbols, which the model can understand and use to learn patterns, relationships, and context. By converting structured, unstructured and semi-structured data into tokens, data platforms ensure that the data is in a format that can be efficiently fed into the training process of enterprise large model AI applications. This step is essential for enabling the model to learn from vast amounts of diverse data, improving its ability to generate accurate and contextually relevant outputs in real-world applications.

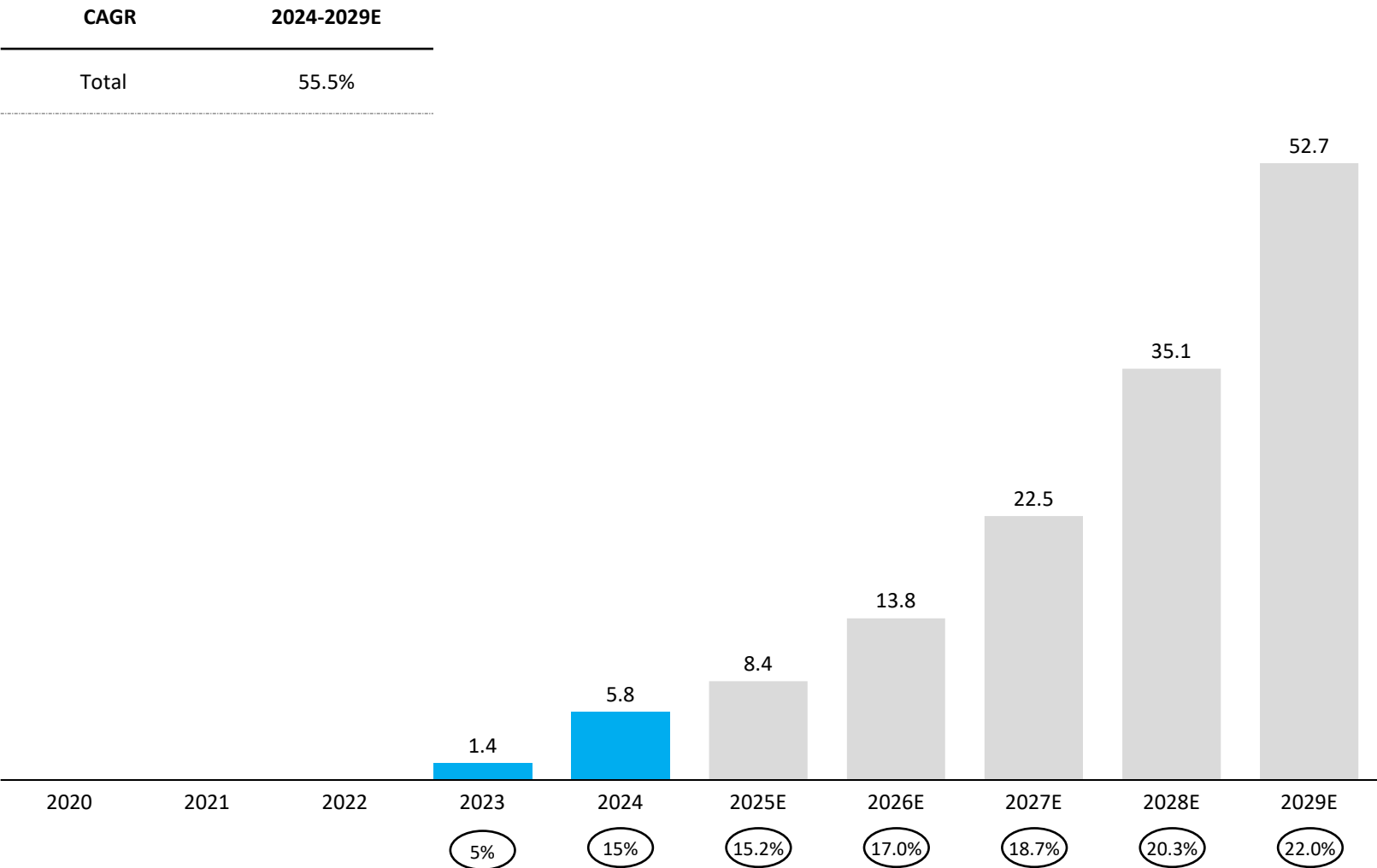
Computing power optimization services

- Computing power optimization services enhance the efficiency of computing resources across diverse infrastructure, enabling enterprises to deploy large model AI applications more cost-efficient.

Overview of Enterprise Large Model AI Application Solution Market in China

Market Size of Enterprise Large Model AI Application Solution Market in China

Market Size of Enterprise Large Model AI Application Solution Market in China, in terms of revenue
RMB Billion, 2024-2029E

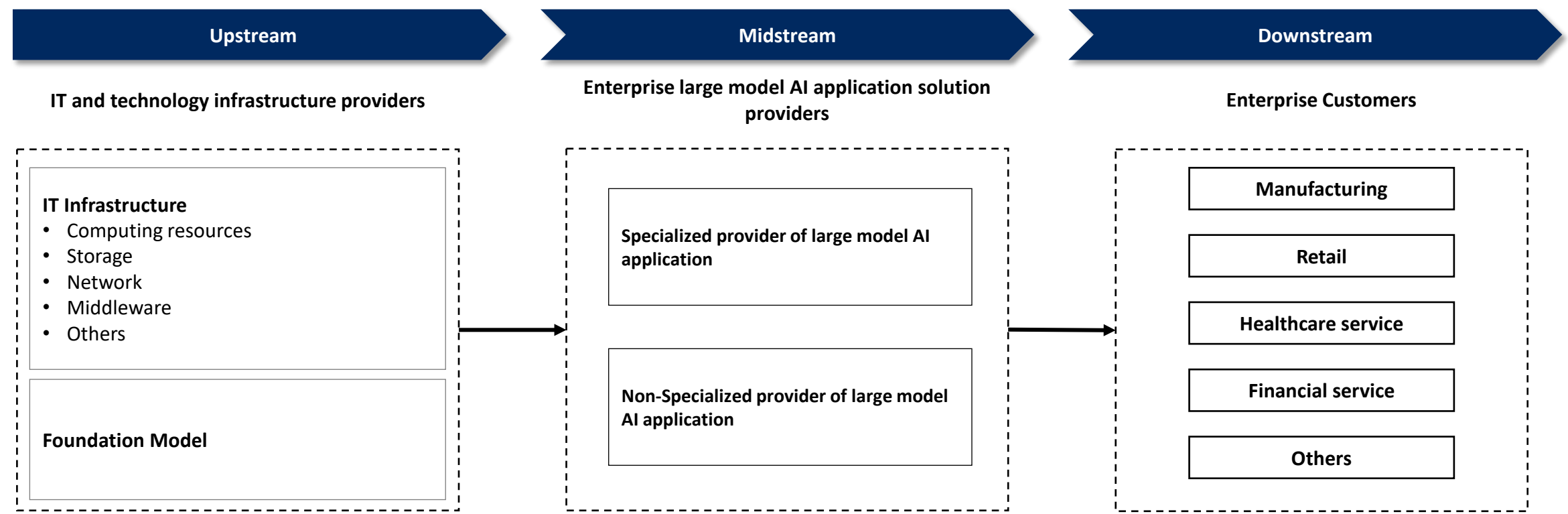


Key Findings

- In 2024, the market size of enterprise large model AI application solution market in China, in terms of revenue, has reached RMB5.8 billion and is expected to reach RMB61.1 billion in 2029, growing with a CAGR of 60.1% from 2024 to 2029.
- The emergence of large models is driving the development of enterprise large model AI applications, especially agentic AI applications.
- Labor expenses related to on-site deployment and employee benefits represent the Group’s major cost component in China’s enterprise large model AI application solutions market. Fluctuation of such expense is considered relatively stable, although salary growth has been slowing down in recent years due to a sluggish job market, it is expected to resume moderate growth in the future in line with the market recovery. The average annual urban salary for employees in private companies within China’s information transmission, software, and IT services industry increased from RMB101.3 thousand in 2020 to RMB123.2 thousand in 2024, reflecting a CAGR of 5.0% from 2020 to 2024, and is expected to reach RMB144.5 thousand in 2029 with a CAGR of 4.1% from 2024 to 2029.

Overview of Enterprise Large Model AI Application Solution Market in China

Value Chain of Enterprise Large Model AI Application Solution Market



Key Findings

- The value chain of China's enterprise large model AI application solution market can be broadly divided into three segments: upstream, midstream, and downstream. The upstream segment consists of IT and technology infrastructure providers, including computing power suppliers, storage providers, network providers, and foundational model developers. The midstream is made up of enterprise large model AI application solution providers who integrate, fine-tune, and deploy these models for business use cases. The downstream segment includes enterprise customers across various industries—such as manufacturing, retail, healthcare, and financial service—who adopt these large model AI application solutions to enhance operational efficiency, improve decision-making, and drive innovation.

Overview of Enterprise Large Model AI Application Solution Market in China

The State of Large Model AI And Its Progression From Generative AI to Agentic AI



The State of Large Model AI And Its Progression From Generative AI to Agentic AI

- The state of large model AI has evolved rapidly since its inception, with a clearer understanding emerging of its progression from generative AI to the more advanced concept of agentic AI. While both generative AI and agentic AI are built upon large model AI and represent cutting-edge advancements in the field, they diverge in their focus and application. Generative AI is designed to create content ranging from text and images, to codes, audio and even video by learning from vast amounts of data and applying that knowledge to generate new, original outputs that mimic human creativity. In contrast, agentic AI goes beyond content creation, and it is capable of making decisions, taking actions and adapting to changing environments, focusing on acting autonomously to achieve specific goals with minimal human intervention.
- Although still in its early stages, agentic AI represents a paradigm shift in the way artificial intelligence is conceptualized and applied. Unlike generative AI, which primarily produces content based on user prompts, agentic AI is capable of acting autonomously to achieve specific objectives within dynamic and evolving environments. As agentic AI continues to advance, it paves the way for the broader potential of artificial general intelligence (AGI), with the long-term vision of achieving artificial superintelligence (ASI), where AI could surpass human cognitive capabilities and operate with a level of intelligence that exceeds that of human beings. Solutions provided by leading market participants extends far beyond basic generative AI capabilities such as simple data retrieval, office collaboration and simple chatbots. They directly tackle core business challenges by providing advanced decision-making support and productivity enhancement tools. By arming individual employees with an extensive knowledge pool that spans both enterprise-wide and industry-specific data, they aims to empower businesses to make better-informed, more impactful business decisions.

	Agentic AI	Generative AI
Key function	Exhibit a level of autonomy, decision-making capability and adaptability that allows them to take actions and interact with various and changing situations for the given goals	Perform a wide range of tasks, including generating original content such as text, images, video, audio, and software code, as well as handling text based processing tasks like summarization, translation, and sentiment analysis in response to user prompts or requests
Output	- Actions, decisions, task completion - AI agents	Contents such as text, images, audio, video and codes
Examples	Both of FastData enterprise data intelligence solution and FastAGI enterprise AI solution fall under large model AI application solution. FastData enterprise data intelligence solution prepares data for AI, delivering tokenized data output for training and finetuning large models and agentic AI applications. FastAGI enterprise AI solution acts as a one-stop solution enabling full processes from knowledge base development and model management to the incubation of AI agents, simplifying the complexities of AI deployment to empower enterprises across industries to optimize decision-making, enhance operational efficiency and boost productivity.	Chatbots, content generation tools, code generation tools and among others

Overview of Enterprise Large Model AI Application Solution Market in China

Market Drivers of Enterprise Large Model AI Application Solution Market in China

1	Open-source foundation models promote accessibility and cost efficiency	• The widespread adoption of open-source foundational large models is accelerating the enterprise adoption of large model AI application solutions by lowering technical barriers and costs. Open-source foundation models eliminate the need for enterprises to build models from scratch, allowing them to achieve rapid knowledge transfer and domain adaptation, which significantly shortens development cycles and enhances efficiency. Additionally, the collaborative nature of the open-source ecosystem fosters faster algorithmic iteration and continuous technological advancement, making large model AI solutions more accessible, particularly for small and medium-sized enterprises.
2	Demand for intelligent solutions in industry-specific scenarios	• As digital transformation accelerates, enterprises are progressively adopting intelligent solutions that are specifically tailored to the unique challenges of their industries. Large model AI application solutions are seen as key to driving breakthroughs that streamline workflows and enhance overall efficiency within vertical markets, through, for example, replacing traditional office tools with more intelligent agents capable of advanced content generation and decision making, thereby positioning enterprises for greater agility and competitiveness in a comprehensive way.

Overview of Enterprise Large Model AI Application Solution Market in China

Future Trends of Enterprise Large Model AI Application Solution Market in China

1	Development of agentic AI	• Leveraging the advancements in large model technology, agentic AI envisions autonomous agents that can perform tasks with unparalleled consistency and reliability. These agents will function as adaptive, independent entities, making real-time decisions and employing context-sensitive strategies. Furthermore, agentic AI agents are anticipated to work in seamless collaboration with other AI systems, coordinating efforts to tackle increasingly complex tasks and drive broader objectives, thereby unlocking the full potential of enterprise large model AI application solutions.
2	Expansion of application scenarios of large model AI	• As large-model AI technologies continue to mature and commercialize, enterprises are expected to increasingly adopt large-model AI application solutions to address a wide range of needs across various industries — from marketing and sales to areas such as R&D, finance, supply chain management, and beyond, which further drive the demand for enterprise large model AI application solutions.
3	Global expansion	• Leveraging a mature domestic sales and service system, along with extensive technical implementation experience, Chinese enterprise large model AI application solution providers are accelerating their expansion into international markets. Chinese providers, with their expertise in complex scenarios and rapid iteration capabilities, are well-positioned to meet the growing need for scalable and efficient solutions in the global market. By integrating localized service networks with partner ecosystems, they can swiftly adapt to regional market demands, transforming proven domestic best practices into globally scalable deployment strategies and driving sustained overseas growth.

Overview of Enterprise Large Model AI Application Solution Market in China

Threats and Challenges of Enterprise Large Model AI Application Solution Market in China

1

High computational costs

- Deploying large models require significant computational resources, including advanced GPUs and substantial energy consumption. Enterprises must carefully evaluate the costs of deploying large model AI application solutions and be prepared for the high ongoing operational expenses involved. While leading solution providers can help improve computing efficiency through dedicated computing power platforms and optimized large model development solution, the significant computational demands may still pose a barrier to adoption for many organizations.

2

Talent shortage

- The growing demand for specialized talent is becoming a key challenge in China’s enterprise large model AI solutions market, as effective development and deployment increasingly depend on cross-disciplinary professionals who combine deep expertise in large models with strong domain-specific knowledge. New entrants may find it difficult to compete with established players in attracting and retaining this highly sought-after talent.

Overview of Enterprise Large Model AI Application Solution Market in China

Government Policies for Enterprise Large Model AI Application Solution Market in China (1/2)

- From the perspective of policy development, China’s large model AI has been developed under the impetus of AI policies at the national level. For the first time, the “13th Five-Year Plan” has made AI a key task and clarified the strategic goals for the development of a new generation of AI, which signifies that AI has risen to the level of national strategy. In the “14th Five-Year Plan”, the importance of achieving breakthroughs in key AI technology areas is further emphasized.
- In order to ensure the healthy development and standardized application of generative AI, and at the same time protect national security and social public interests, in July 2023, the National Internet Information Office, the National Development and Reform Commission, the Ministry of Education, the Ministry of Science and Technology, and the Ministry of Industry and Information Technology jointly issued the Interim Measures for the Administration of Generative Artificial Intelligence Services. Since then, the relevant departments have issued guiding and supporting policy documents to accelerate the development of generative AI and encourage its application in various fields.

Policy Name	Issuing Authority	Issued Date	Key Contents
Interim Measures for the Management of Generative AI Services 《生成式人工智能服务管理暂行办法》	Seven departments including the Cyberspace Administration of China and the National Development and Reform Commission	2023	Promote the construction of generative artificial intelligence infrastructure and public training data resource platforms. Promote collaborative sharing of computing power resources and enhance the efficiency of computing power resource utilization. Promote the orderly and open classification and grading of public data, and expand high-quality public training data resources. Encourage the use of secure and trustworthy chips, software, tools, computing power, and data resources.
Special Plan for the Development of General Aviation during the 14th Five Year Plan Period 《关于数字经济发展情况的报告》	The State Council	2022	Deeply implement new infrastructure construction special projects, continue to promote the large-scale deployment of 5G networks and convergence applications, actively cultivate vertical industry application scenarios, and build artificial intelligence infrastructure for key regions and key industries.
Guiding Opinions on Accelerating Scene Innovation and Promoting High Quality Development of the Economy through High Level Application of Artificial Intelligence 《关于加快场景创新以人工智能高水平应用促进经济高质量发展的指导意见》	Six departments including the Ministry of Science and Technology	2022	- Scene innovation has become a new path for the upgrading of artificial intelligence technology and industrial growth, and the achievements of scene innovation continue to emerge, promoting the development of the new generation of artificial intelligence to a higher level. - Encourage the use of artificial intelligence technology in major construction projects such as strategic backbone channels, high-speed railways, port and shipping facilities, and modern airports to improve the efficiency of major construction projects.
Notice by the State Council of Issuing the Plan for Development of the Digital Economy During the “14th Five-Year” Period 《关于印发“十四五”数字经济发展规划的通知》	The State Council	2021	Efficiently layout artificial intelligence infrastructure and enhance industry empowerment capabilities that support the development of "intelligence+". Encourage the application of intelligent technology in various fields, promote the intelligent transformation of various industries, and lay a solid foundation for the future development of "intelligence+".

Overview of Enterprise Large Model AI Application Solution Market in China

Government Policies for Enterprise Large Model AI Application Solution Market in China (2/2)

Policy Name	Issuing Authority	Issued Date	Key Contents
The Fourteenth Five-Year Plan 《中华人民共和国国民经济和社会发展第十四个五年规划》	The Central Committee of the Communist Party of China	2020	Focusing on key areas such as high-end chips, operating systems, key algorithms for artificial intelligence, and sensors, we will accelerate breakthroughs and iterative applications in research and development of basic theories, algorithms, equipment materials, and more. Strengthen the integrated research and development of general-purpose processors, cloud computing systems, and software core technologies.
Guidelines for the Construction of National New Generation Artificial Intelligence Innovation and Development Pilot Zones 《国家新一代人工智能创新发展试验区建设工作指引》	Ministry of Science and Technology	2020	Explore new paths to promote the deep integration of artificial intelligence and economic and social development. Focusing on the urgent needs of local economic development and improvement of people's livelihoods, we will carry out demonstrations of artificial intelligence technology applications in multiple fields, expand application scenarios, accelerate the deep integration of artificial intelligence with the real economy, and promote the widespread application of artificial intelligence in the field of social livelihood.
Guiding Opinions of the Ministry of Industry and Information Technology regarding Accelerating the Cultivation of New Business Modes and Formats of Shared Manufacturing to Promote High-quality Development of the Manufacturing Industry 《关于加快培育共享制造新模式新业态促进制造业高质量发展的指导意见》	Ministry of Industry and Information Technology	2019	Support platform enterprises to actively apply technologies such as cloud computing, big data, the Internet of Things, and artificial intelligence, develop functions such as intelligent quotation, intelligent matching, intelligent scheduling, and intelligent monitoring, and continuously improve the intelligence level of the entire shared manufacturing process.
Guiding Opinions on Promoting the Deep Integration of Artificial Intelligence and the Real Economy 《关于促进人工智能和实体经济深度融合的指导意见》	The State Council	2019	To promote the deep integration of artificial intelligence and the real economy, we must grasp the characteristics of the development of the new generation of artificial intelligence, adhere to market demand as the guide, aim for industrial application, deepen reform and innovation, optimize the institutional environment, stimulate enterprise innovation vitality and endogenous power, and explore the path and method of applying and transforming innovative achievements based on the characteristics of different industries and regions.

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4. Overview of Overseas Enterprise Large Model AI Application Solution Market



Competitive Landscape of Enterprise Large Model AI Application Solution Market in China

Ranking of Top Enterprise Large Model AI Application Solution Providers in China

Ranking of Top Enterprise Large Model AI Application Solution Providers in China			
Ranking	Company	Revenue (RMB Million, 2024)	Market Share (%, 2024)
1	Company A	640	11.0%
2	Company B	560	9.7%
3	Company C	420	7.3%
4	Company D	400	6.9%
5	Company E	243	4.2%

Notes:

(1) Company A, founded in 2000 in Beijing, is a public company listed on both Hong Kong Stock Exchange and NASDAQ. Company A is an AI company that offers a wide range of products and services including mobile internet services, cloud services, intelligent driving and among others to both enterprise grade customers and individual customers based on various monetization method such as project-based method or subscription-base method. Company A has less than 40 thousand employee as of December 31, 2024.

(2) Company B, founded in 1999 in Hefei, is a public company listed on Shenzhen Stock Exchange. Company B is an AI company primarily adopting intelligent audio technology, which provides a wide range of services including intelligent education services, consumer services, smart city business, enterprise AI solutions and among others to both enterprise grade customers and individual customers based on various monetization method such as project-based method or sales of products. Company B has approximately 5,000 employee as of December 31, 2024.

(3) Company C, founded in 1999 in Hangzhou, is a public company listed on both the Hong Kong Stock Exchange and the New York Stock Exchange. Company C provides a wide range of services across cloud and AI services, logistics services, local lifestyle services, entertainment services, and e-commerce services to both enterprise grade customers and individual customers based on a variety of monetization method such as project-based method or take rate-based method Company C has less than 200 thousand employee as of December 31, 2024.

(4) Company D, founded in 2014 in Hong Kong, is a public company listed on the Hong Kong Stock Exchange. Company D is an AI company primarily adopting computer vision technology, which primarily provides computer vision AI solutions, automobile solutions, computing infrastructure solutions and among others to enterprise-grade customers based on project-based monetization method. Company D has less than 5,000 employee as of December 31, 2024.

Key Findings

- The competitive landscape of the enterprise large model AI application solution market in China is relatively concentrated, with the top five providers accounting for 39.1% of the total market share in terms of revenue in 2024. There were approximately 100 market players in the enterprise large model AI application market in China. These key players can be broadly categorized into two distinct groups: 1) specialized providers of large model AI application solutions, and 2) diversified solutions providers. The market size of the enterprise large model AI application solution contributed by specialized providers was at RMB1.1 billion in 2024, and the market size contributed by diversified solutions providers was at RMB4.7 billion in 2024.
- Deepexi ranked fifth in China’s enterprise large model AI application solution market, in terms of revenue in 2024, with a market share of 4.2% and is expected to reach 4.4% in 2025.
- Deepexi’s market share in 2024 in the enterprise AI application solutions market in China was 0.6%.
- The enterprise large model AI application market accounted for 15% of the overall enterprise AI application solution market in 2024 and is expected further to increase to 22% in 2029. Given the substantial scale of China’s enterprise AI application solution market, Deepexi held a 0.6% market share in 2024, ranking outside the top ten providers.

Competitive Landscape of Enterprise Large Model AI Application Solution Market in China

Key Success Factors of Enterprise Large Model AI Application Solution Market

1	Engineering capability	Engineering capability is a key success factor in the enterprise large model AI application market. It involves developing and deploying large model AI solutions within enterprise applications, including building robust technical frameworks, integrating complex systems, and ensuring continuous operation and maintenance tailored to industry-specific needs. Leading market players with strong engineering capabilities are better positioned to deliver customized, industry-specific solutions that meet enterprise requirements. In contrast, new entrants often lack mature technology frameworks and adaptive toolchains, making it difficult to meet the high standards of stability, security, and response speed demanded by enterprise customers. This results in longer product delivery cycles and higher failure rates, hindering newcomers from matching the technological maturity of established players in the short term.
2	Product capability	Leading enterprise large model AI application solution providers continuously refine solution performance and expand functionalities by leveraging extensive customer feedback. Through ongoing updates and iterations, they develop more advanced large model AI application solutions tailored to diverse industry-specific scenarios. In contrast, new entrants, lacking deep industry expertise, long-term technological accumulation, and real-world scenario validation, often struggle to support the complex business logic required by enterprises.
3	Industry know-how	Leading enterprise large model AI application solution providers possess deep expertise in embedding business processes, understanding industry-specific logic, and adhering to compliance regulations. Through long-term collaboration with top industry clients, they build extensive knowledge bases that capture business rules and scenario constraints, refining them into optimization targets for large model AI application solutions. In contrast, new entrants lacking industry know-how face prolonged development cycles from pilot to scale, struggling with both low customer trust and limited market presence.
4	Data capability	The data capability of large model AI application solution providers is fundamental to the development of large model AI application solutions as these large model and applications rely heavily on vast amounts of diverse, high-quality data for training. Providers with advanced data capabilities — particularly in the integration of data with AI technologies — are able to handle complex tasks across various industries with greater accuracy, scalability, and relevance. Such capabilities not only enable more efficient data processing and model training but also ensure that the resulting solutions are adaptable to the unique needs of different sectors.

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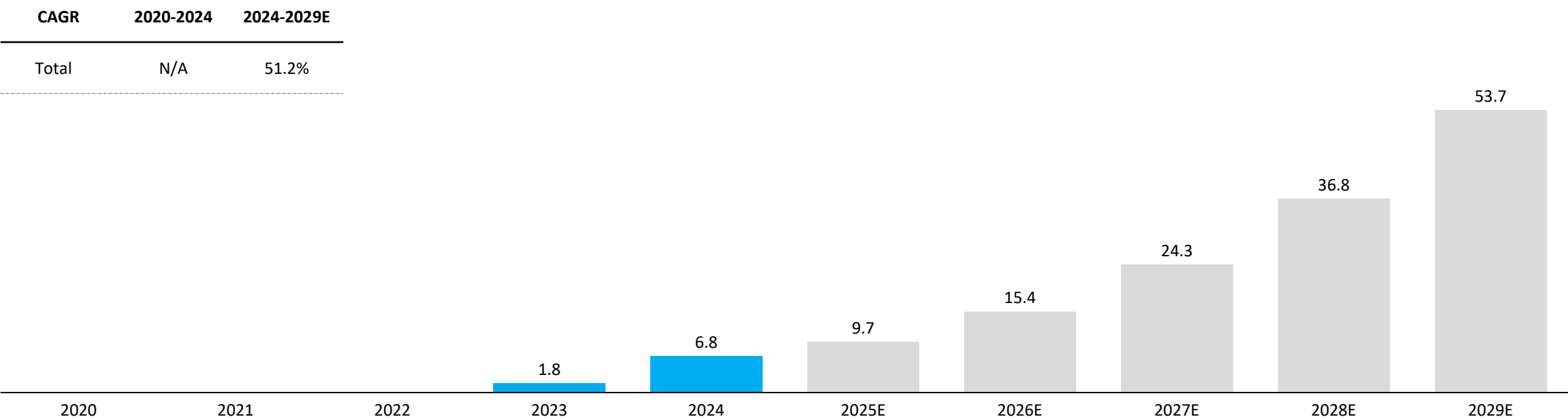
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Overview of Overseas Enterprise Large Model AI Application Solution Market

Market Size of Overseas Enterprise Large Model AI Application Solution Market Excluding China

Market Size of overseas enterprise large model AI application solution market, in terms of revenue
USD Billion, 2024-2029E



- Key Findings**
- The development of enterprise large model AI application solution market has been rapidly evolving on a global scale. Collaborations and knowledge exchanges between enterprises globally contribute to the flourishing overseas enterprise large model AI application solution market, addressing the need for global development and collaboration in the field of large model AI. The market size of the overseas enterprise large model AI application solution market excluding China, in terms of revenue, is expected to increase from USD6.8 billion in 2024 to USD53.7 billion in 2029 with a CAGR of 51.2% from 2024 to 2029.
 - The market size of the Southeast Asia and the Middle East enterprise large model AI application solution, in terms of revenue, is expected to increase from US\$0.6 billion in 2024 to US\$5.7 billion in 2029, representing a CAGR of 111.8% from 2024 to 2029. Both Southeast Asia and the Middle East are undergoing rapid digital transformation, supported by strategic government initiatives such as ASEAN’s Digital Economy Framework Agreement and the UAE AI Strategy 2031. These programs are designed to foster innovation, drive economic diversification, and stimulate demand for AI-powered solutions, thereby creating a favorable environment for market entry and expansion. Additionally, the linguistic diversity across both regions has generated strong demand for multilingual LLMs that are attuned to local languages and cultural contexts. Existing global models, which are predominantly trained in English, often fall short in meeting these regional needs. This presents a clear opportunity for Chinese providers to offer localized solutions. With established competitive strength in AI, particularly in the development of LLMs, Chinese companies are well-positioned to capture market opportunities as they expand into these regions.

Overview of Overseas Enterprise Large Model AI Application Solution Market

Future Trends of Overseas Enterprise Large Model AI Application Solution Market



Compliance design

- With the continued strengthening of regulatory requirements for data sovereignty and privacy protection in overseas markets, the compliance design of large model AI application solutions for overseas enterprises will continue to evolve. In the future, more and more overseas large model AI solution providers will build configurable compliance module libraries within their solutions, covering regulatory standards in major markets such as the EU, North America, and Southeast Asia. This will enable real-time adaptation to different regional regulatory frameworks, such as data localization storage and ethical review mechanisms. At the same time, edge computing capabilities will be integrated to ensure localized data processing loops.



Accelerated global replication and localization of industry-specific solutions

- Enterprise large model AI application solutions are evolving towards industry-specific directions. Vendors are building reusable industry model foundations through self-research to support rapid cross-regional adaptation and local deployment. To meet differentiated industry demands in overseas markets, such as process optimization in Europe's high-end manufacturing and personalized marketing in Southeast Asia's e-commerce, solutions need to incorporate regional business logic and data characteristics. This allows for dynamic adjustment of model parameters and knowledge base rules. For example, combining pre-trained industry models with local data enables precise migration from general capabilities to regional scenarios. In the future, more vendors will develop modular industry suites. These suites will enable enterprises to quickly inject local business rules into a standardized framework, reducing secondary development costs and shortening deployment cycles. This capability will drive solutions from single-region pilots to global-scale replication.



Multilingual and cross-cultural adaptation defines technical competition

- The linguistic diversity, cultural differences, and unique industry practices of overseas markets are pushing vendors to enhance their products' multimodal generalization capabilities. The technical focus is on self-developed multilingual NLP frameworks that support high-precision semantic parsing and culturally sensitive content generation, mitigating business risks from language ambiguity or cultural conflicts. Additionally, upgraded multimodal collaborative generation capabilities (text, image, voice) are becoming essential for scenarios like manufacturing visual inspection and cross-border retail virtual shopping assistance. Leading vendors are establishing dynamic knowledge injection mechanisms and cross-scenario transfer learning models. This enables rapid response to regional demands, creating technical differentiation and customer loyalty.

Overview of Overseas Enterprise Large Model AI Application Solution Market

Market Regulation and Industry Policy Analysis of Overseas Enterprise Large Model AI Application Solution Market

- Overseas markets are characterized by diversity in the regulation of enterprise large model AI application solutions. In general, it focuses on both technological innovation and industrial development and emphasizes risk prevention and governance, with different countries and regions adopting diversified regulatory strategies according to their own circumstances.

Policy Name	Issuing Country	Issued Date	Key Contents
Management Framework for Generative AI Models 《生成式人工智能模型管理框架》	Singapore	2024	The framework addresses nine key dimensions, including accountability, data quality and privacy, trusted development and deployment, incident reporting, testing and assurance, security, content sourcing, safety and consistency R&D, and AI for public benefit, to facilitate the formation of a trusted ecosystem for generative AI.
Artificial Intelligence Act 《人工智能法案》	EU	2024	- The Act categorizes AI systems into different risk levels, with high-risk AI systems requiring stringent regulation, including risk assessment, transparency requirements, and human oversight. - The Act also requires that AI systems should be designed and deployed with consideration of data governance, record-keeping and cybersecurity.
The Artificial Intelligence and Data Act 《关于加快场景创新以人工智能高水平应用促进经济高质量发展的指导意见》	Canada	2023	- The Artificial Intelligence and Data Act offers a balanced approach to regulating AI that will support responsible innovation and ensure international market access for larger Canadian businesses, while also considering the needs of small and medium-sized businesses. - For businesses, this means clear rules to help them innovate and realize the full potential of AI. For Canadians, it means AI systems used in Canada will be safe and developed with their best interest in mind. - The Government of Canada remains actively engaged in international discussions on AI regulations and continues to work with partners around the world to drive collaboration and ensure alignment in the responsible development and use of AI.
Executive Order on Safe, Secure, and Trustworthy Artificial Intelligence 《关于安全、可靠和可信的人工智能的行政命令》	US	2023	Policy goals outlined in the executive order pertain to promoting competition in the AI industry, preventing AI-enabled threats to civil liberties and national security, and ensuring U.S. global competitiveness in the AI field. The executive order required a number of major federal agencies to create dedicated "chief artificial intelligence officer" (chief AI officer) positions within their organizations.

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Descriptions About Deepexi (1/4)

	Relevant Topics	Key Contents
1	Business	Deepexi ranked first among specialized provider of large model AI application in China's enterprise large model AI application solution market in terms of revenue in 2024. Deepexi was also among the first specialized provider of large model AI application in China to build an AI-ready data fusion platform, positioning us as a core enabler of enterprise AI transformation.
2	Business	The Company pioneered the application of agentic AI in commercial solutions and led numerous technological advancements. The Company were among the first enterprise with independently-developed proprietary large model capabilities in China to build such a platform, positioning it as a core enabler of enterprise AI transformation. Its proprietary large model is the industry's first general-purpose enterprise operational decision-making large model to complete dual regulatory filings for both deep synthesis algorithm and generative AI services.
3	Business	Deepexi specialize in delivering cutting-edge AI solutions, empowering enterprises to integrate their data, decisions and operations efficiently at scale.
4	Business	Deepexi's commercialization-oriented technological capabilities are a core competitive advantage driving its future growth.
5	Business	For example, for the consumer goods sector, Deepexi's operational agent revolutionizes operational management by enabling intelligent decision-making. For the manufacturing sector, Deepexi's productivity agent acts as a smart brain for engineering design, fostering human-machine collaboration to enhance design efficiency and accuracy.
6	Business	The majority of Deepexi's customers are end users of its products and services, while some of its customers are system integrators. Some end users for its solutions engage system integrators when selecting suppliers and solution providers. Such system integrators help end users by directly negotiating with a large number of suppliers or solution providers, although in most cases the end users will also need to approve and confirm the suppliers' selection. Although a portion of its customers are system integrators, not end users, its business model is not a distributorship model. As stated above, system integrators are not distributors that it engages to broaden its sales channels; rather, they are agents selected by Deepexi's end users to implement their projects, and the ultimate decisions as to which service provider to choose are primarily made by the end users. Regardless of whether Deepexi's contracts were entered into directly with its end users or with system integrators, there is no material disparity in contract terms and the scope of Deepexi's services. When Deepexi enter into a contract with a system integrator, it recognize such system integrator, instead of the relevant end user, as its customer. When Deepexi enter into a contract with a system integrator, it recognize such system integrator, instead of the relevant end user, as its customer.
7	Business	Each of Deepexi's products and solutions fall within an acceptable sector of a Specialist Technology Industry as defined under Chapter 18C of the Listing Rules.
8	Business	Deepexi maintains insurance policies that are required under PRC laws and regulations, and based on its assessment of its operational needs and industry practice
9	Financial performance	Deepexi typically recorded higher revenue and cost of sales in the second half of each year. This trend is primarily due to its customer base, which is concentrated in the consumer goods, manufacturing, healthcare and transportation. These customers generally initiate projects in the first half of the year and complete contracts in the second half, based on their business plans and the progress of its solution development and deployment, which, aligns with industry practice.
10	Risk	Although Deepexi has market-leading technology, it may face competition from established market players which may possess more resources and skills in R&D and sales and marketing.

Appendices

Descriptions About Deepexi (2/4)

	Relevant Topics	Key Contents
11	Risk	The enterprise large model AI application solution industry in which Deepexi operates is characterized by constant development, including rapid technological evolution, frequent introductions of new solutions, continual shifts in customer demands and constant emergence of new industry standards and practices.
12	Risk	While the enterprise large model AI application solution market is in an early stage of development, it is, and is expected to be, increasingly competitive. Deepexi currently face and may face more intense competition from other companies.
13	Risk	Deepexi's results of operations may fluctuate, in part, because of the intensive nature of its sales efforts and the length and unpredictability of Deepexi's sales cycle.
14	Risk	Deepexi's results of operations depend on sales to enterprise customers, which make product purchasing decisions based in part on factors, or perceived factors, not directly related to the features of the platforms, including, among others, that customer's projections of business growth, uncertainty about economic conditions, capital budgets, anticipated cost savings from the implementation of Deepexi's platforms, potential preference for such customer's internally developed software solutions, perceptions about its business and platforms, more favorable terms offered by potential competitors, and previous technology investments.
15	Risk	Certain decisionmakers and other stakeholders within Deepexi's potential customers tend to have vested interests in the continued use of internally developed or existing software, which may make it more difficult for us to sell Deepexi's platforms and services.
16	Risk	Many of Deepexi's current and potential competitors have the ability to dedicate substantially greater resources to enforce and/or defend their intellectual property rights than Deepexi does.
17	Risk	Some of Deepexi's competitors have large intellectual property portfolios, and may claim that Deepexi's expected commercial use of its solutions have infringed their intellectual properties. These intellectual properties have broad claims, so it might be alleged that certain features of Deepexi's solutions fall within the claims of such intellectual properties.
18	Risk	AI technologies are in the process of development and continue to evolve. Similar to many disruptive innovations, AI technologies present risks and challenges, such as misuse by third parties for inappropriate purposes, for purposes breaching public confidence or even violating applicable laws and regulations in China. Adoption of AI technologies in bias applications or mass surveillance could affect user perception, public opinions and their adoption.
19	Risk	Since Deepexi operates in a highly competitive market, brand maintenance and enhancement directly affect Deepexi's ability to maintain its market position.
20	Risk	Labor costs in regions where Deepexi operates have been increasing in recent years and may potentially continue increasing.

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Descriptions About Deepexi (3/4)

	Relevant Topics	Key Contents
21	Risk	The industry in which Deepexi operate in general is affected by macro-economic factors, including international, national, regional and local economic conditions, consumer demand and discretionary spending. Any changes in these factors may have material and adverse effect on Deepexi's business, financial condition and prospects.
22	Business	Market validation is evident through strong customer adoption and Deepexi's growing industry reputation.
23	Business	Deepexi's solution extends far beyond basic AI capabilities such as simple data retrieval, office collaboration and simple chatbots. It directly tackles core business challenges by providing in-depth operational decision-making support and productivity enhancement tools.
24	Business	Deepexi's first-mover advantage in data significantly enhances the logical reasoning and problem-solving capabilities of Deepexi's agentic AI solutions, solidifying Deepexi's competitive edge.
25	Business	As the open-source foundation model ecosystem becomes a prominent trend, Deepexi's strengths in data engineering, model engineering and agentic application engineering solidify Deepexi's leadership in enterprise large model AI application market.
26	Business	With extensive expertise in AI, big data and software engineering, they continuously innovate and refine Deepexi's technological infrastructure and solutions, ensuring Deepexi remain at the industry forefront.
27	Business	For example, for the consumer goods sector, Deepexi's DataSense operational agent revolutionizes operational management by enabling intelligent decision-making.
28	Financial Information	The need for more advanced data solution increased resulting from the rapid development of AI in 2024.
29	Business	Deepexi's FastData solution leverages advanced AI algorithms to tokenize raw, multi-modal data, transforming them into actionable insights and into formats optimized for AI applications and large model training and fine-tuning, and real-time decision-making across industries.
30	Business	FastData Foil Data Fusion Platform is capable of processing 1.9 billion tasks per minute (equivalent to approximately 31.7 million tasks per second) while 1.0 billion tasks per minute is common across the industry, supporting high throughput in concurrent data processing scenarios.

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Descriptions About Deepexi (4/4)

	Relevant Topics	Key Contents
31	Business	• In terms of system performance, core data operations and analytics functions operate at millisecond-level latency, while end-to-end real-time data processing has been demonstrated at sub-second level, with practical implementations achieving latency as low as 0.5 seconds, while the industry benchmark is typically considered at 3 seconds.
32	Business	• Deepexi’s model is able to achieve high accuracy of up to 89.7%. In comparison, the industry benchmark stands at 82.9%. • Deepexi’s model achieved a low false negative rate of only 5.9% and a recall rate of 94.2%, while the industry benchmark shows a false negative rate of 25.7% and a recalled rate of 74.3%, demonstrating its ability to identify risks comprehensively while minimizing the likelihood of misclassifying harmful content as safe.

Scope, Methodology and Key Assumptions



- ✓ Unless otherwise specified, the report defines 2024 as the base year, 2020 to 2023 as the historical period, and 2025 to 2029 as the forecast period.
- ✓ The methodology employed in this report combines data from proprietary database, insights gathered through interviews with industry experts, and our understanding on the defined markets. This integrated approach facilitates a thorough and accurate analysis of current developments, trends, market sizes, and competitive landscapes within the defined markets, ensuring the provision of precise and reliable information.
- ✓ This report is prepared under the key assumptions that the social, economic, and political environments in the PRC and globally will remain stable throughout the forecast period, ensuring sustainable and steady development of the defined markets. It also assumes no significant adverse changes in government policies affecting these markets.

About US

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Source: Frost & Sullivan

Thanks!

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