IDC FutureScape

China AI:

Redefining Global Competition for the Agentic Future
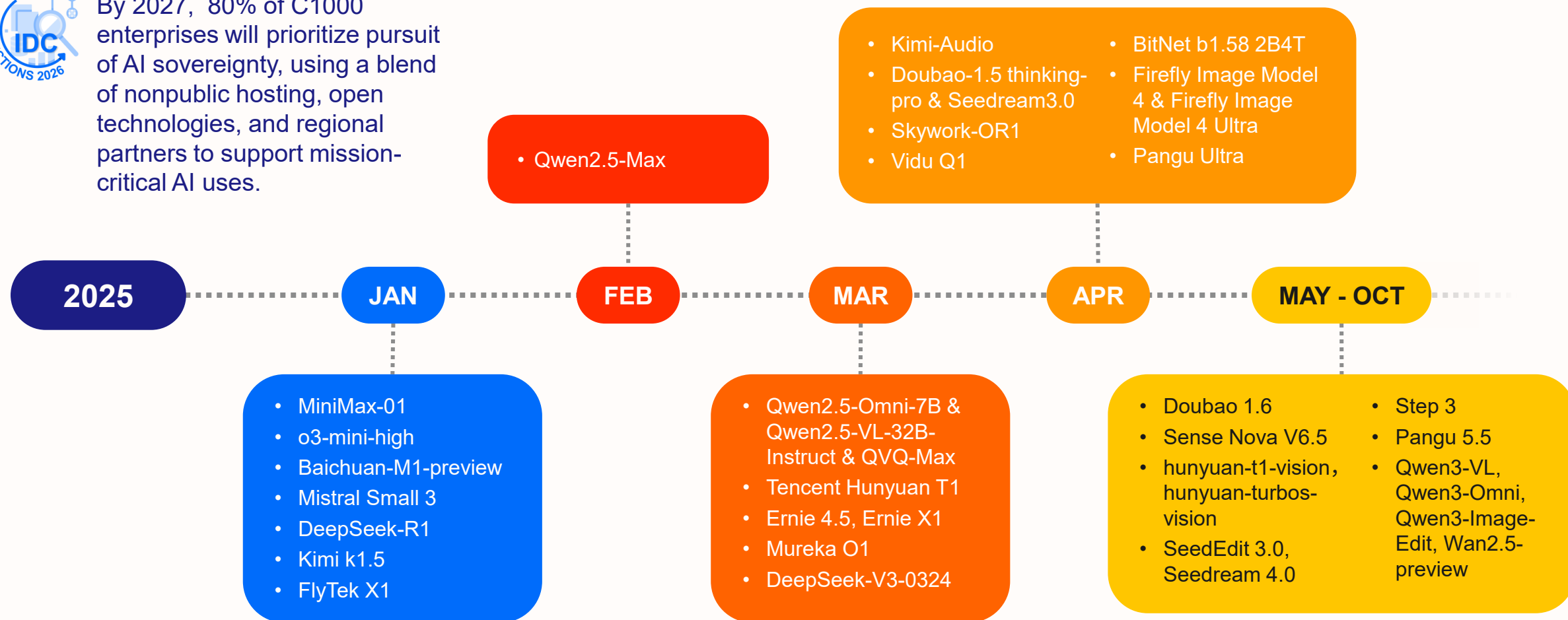
A Year of Rapid Development for China AI

By 2027, 80% of C1000 enterprises will prioritize pursuit of AI sovereignty, using a blend of nonpublic hosting, open technologies, and regional partners to support mission-critical AI uses.

2025

JAN

- MiniMax-01
- o3-mini-high
- Baichuan-M1-preview
- Mistral Small 3
- DeepSeek-R1
- Kimi k1.5
- FlyTek X1

FEB

- Qwen2.5-Max

MAR

- Qwen2.5-Omni-7B & Qwen2.5-VL-32B-Instruct & QVQ-Max
- Tencent Hunyuan T1
- Ernie 4.5, Ernie X1
- Mureka O1
- DeepSeek-V3-0324

APR

- Kimi-Audio
- Doubao-1.5 thinking-pro & Seedream3.0
- Skywork-OR1
- Vidu Q1
- BitNet b1.58 2B4T
- Firefly Image Model 4 & Firefly Image Model 4 Ultra
- Pangu Ultra

MAY - OCT

- Doubao 1.6
- Sense Nova V6.5
- hunyuan-t1-vision，hunyuan-turbos-vision
- SeedEdit 3.0, Seedream 4.0
- Step 3
- Pangu 5.5
- Qwen3-VL, Qwen3-Omni, Qwen3-Image-Edit, Wan2.5-preview

China Open-Source Models Impacting Global Markets

Model Performance :

- Emergence of DeepSeek

- Qwen/Wan continues to deepen its cultivation, and Qwen3 Coder has achieved SOTA in SWE Bench and other evaluations

- GLM4.6 outperforms Claude Sonnet 4 in CC-Bench reviews

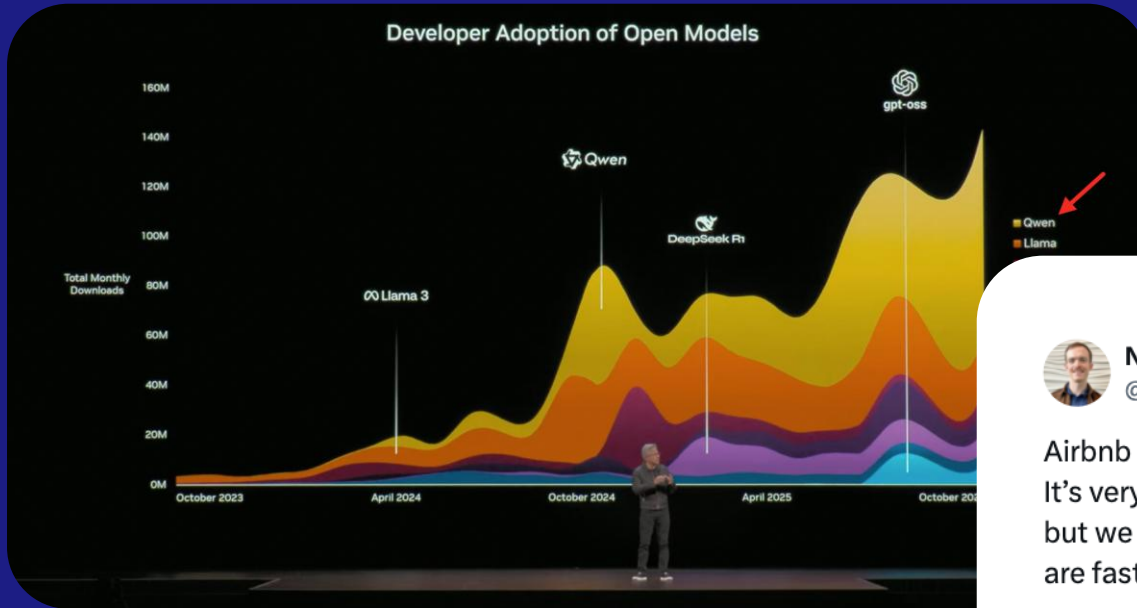- SkyReels V1 trending in South Korea and Latin America with short drama generation capabilities.

K KIMI

Kimi K2 has a rating of over 94% on the global AI programming evaluation platform Roo Code, ranked first.

Rapid Product Implementation

- ByteDance Trae, Tencent Codebuddy, Alibaba Qoder VS Claude Code, GPT, Cursor, Windsurf

China Open-Source Models Impacting Global Markets

China Foundational Model Players

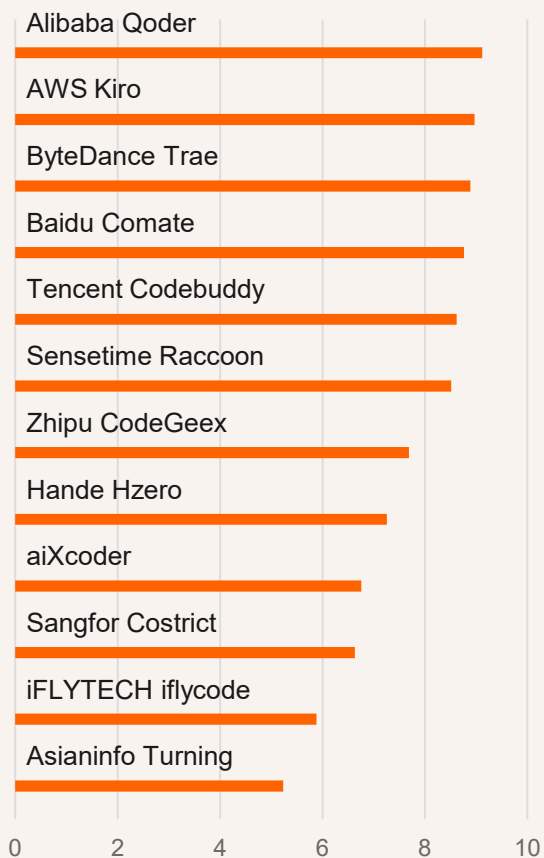| Developers Community			
Alibaba ModelScope	**Baidu AI Studio**	**Hugging face**	**Tianyi Cloud Modelers**
Multi Modal			**Reasoning Models**
• Alibaba -Qwen 3 Omni • Baidu –Ernie 4.5 • Meta-Llama 4 • iFlyTek -Spark	• Sensetime -Sense Nova V6.5 • ByteDance - Doubao1.6	• Tencent - Hunyuan	• Alibaba-Qwen3-Max • Baidu-Ernie X1 • Baichuan - Baichuan-M2 • DeepSeek - DeepSeek R1 & V3.2--Exp • Stepfun - Step Reasoner mini • iFlyTek – Spark X1 • Xiaomi - Xiaomi MiMo-7B • Moonshot - Kimi k2 • Zhipu - GLM-4.6 • Bytedance – Doubao 1.6
Image	**Video**	**Audio**	

• Alibaba - Wan2.5-preview，
  Qwen3-Image-Edit
• Baidu –Ernie X1 Turbo
• Huawei - Pangu-Draw
• Kuaishou - Kolors
• Sensetime - SenseNova 6.5，
• Tencent - Hunyuan
• Zhipu - CogView4
• Bytedance - Seedream 4.0,
  Doubao 1.6
	• Alibaba - Wan2.5-preview
	• Kuaishou – Kling 2.5
	• Kunlun - SkyReels
	• Pika Labs-Pika 2
	• Runway-Gen4
	• Sensetime - Vimi
	• Shengshu - Vidu
	• Tencent – Hunyuan Video
	• Bytedance – Doubao 1.6
		• Hume AI-Octave
		• Meta-Musicgen, AudioCraft
		• Stability AI-Stable Audio Open 1.0
		• Suno-Suno V3
		• Tiangong - SkyMusic
		• Bytedance – Doubao	

LLM			
• Alibaba - Qwen • Tencent – Hunyuan • Baidu - Ernie • Baichuan-Baichuan • DeepSeek	• Sensetime - Sensenova • iFlytek – Spark	• Zhipu - GLM • Bytedance-Doubao	

IDC Market Glance: 中国 AI Agent 市场概览 2025Q4

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Application Development Platform

Model Development Platform
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aws · databricks · IBM · LangChain · Microsoft · SAS · SANGFOR 深信服 · TRANSWARP 星环科技 · 腾讯云 · 蚂蚁集团 ANT GROUP · 数字科技 · 天翼AI · 智谱·AI

Agent Development Platform
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商汤 SenseTime · TRANSWARP 星环科技 · ZStack 云轴科技 · 硅基流动 SiliconFlow · ZTE 中兴

Monetization - Code Assistance

Test Language—C++

- Alibaba Qoder
- AWS Kiro
- ByteDance Trae
- Baidu Comate
- Tencent Codebuddy
- Sensetime Raccoon
- Zhipu CodeGeex
- Hande Hzero
- aiXcoder
- Sangfor Costrict
- iFLYTECH iflycode
- Asianinfo Turning

Test Language—Java

- AWS Kiro
- Alibaba Qoder
- ByteDance Trae
- Baidu Comate
- Sensetime Raccoon
- Tencent Codebuddy
- Zhipu CodeGeex
- Sangfor Costrict
- Hande Hzero
- iFLYTECH iflycode
- aiXcoder
- Asianinfo Turning
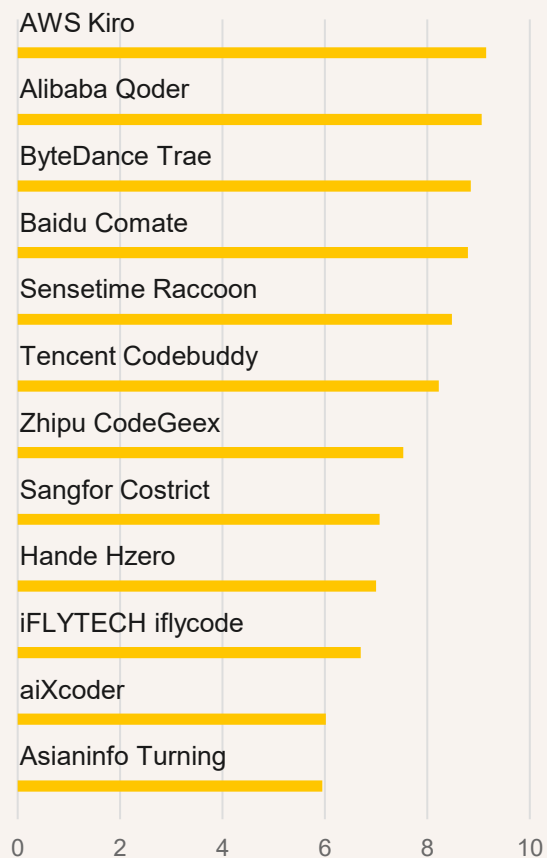
By 2027, 35% of professional developers will adopt vibe coding development platforms for production apps as enterprise-grade capabilities mature.

China AI Coding Market

New Generation of China AI Coding

More Comprehensive Products

Vendors are now releasing AI native IDEs, with support for with model selection, multi-file, MCP, knowledge base etc
- Alibaba：Coding IDE Qoder
- Tencent：Coding IDE Codebuddy
- ByteDance：Coding IDE Trae
- Baidu：Coding IDE Comate
- AWS：Coding IDE Kiro

Stronger Opensource Models

Since the emergence of Deepseek, China vendors are now putting more focus on opensource models with capabilities close or better than Claude series, at 1/3-1/2 of the cost.
- Alibaba：Qwen3-Coder，480B
- DeepSeek：DeepSeek V3.1 and V3.2
- Zhipu：GLM-4.5，capabilities close to Claude Sonnet 4
- Moonshot：Kimi2，1000B，achieved SOTA

Newcomers

Kuaishou CodeFlicker, Meituan LongCat, Sensetime Raccoon, Huawei CodeArts/Doer, iFlytek iflycode, Sangfor Costrict, JD JoyCode, Gitlab CodeRider, aiXcoder, Fitten Code

Future Market Outlook

Product & Technology
- More open models (Parameter>1T）
- Evolution of DSL: SQL/GO, Gaming
- Model → Agent → Software
- Support for 3rd party models, non-thinking models

Business Model
- Low pricing strategy (price ~ RMB 20/month）
- Top vendors already achieved 100% growth in 2025, total revenue less than 100m
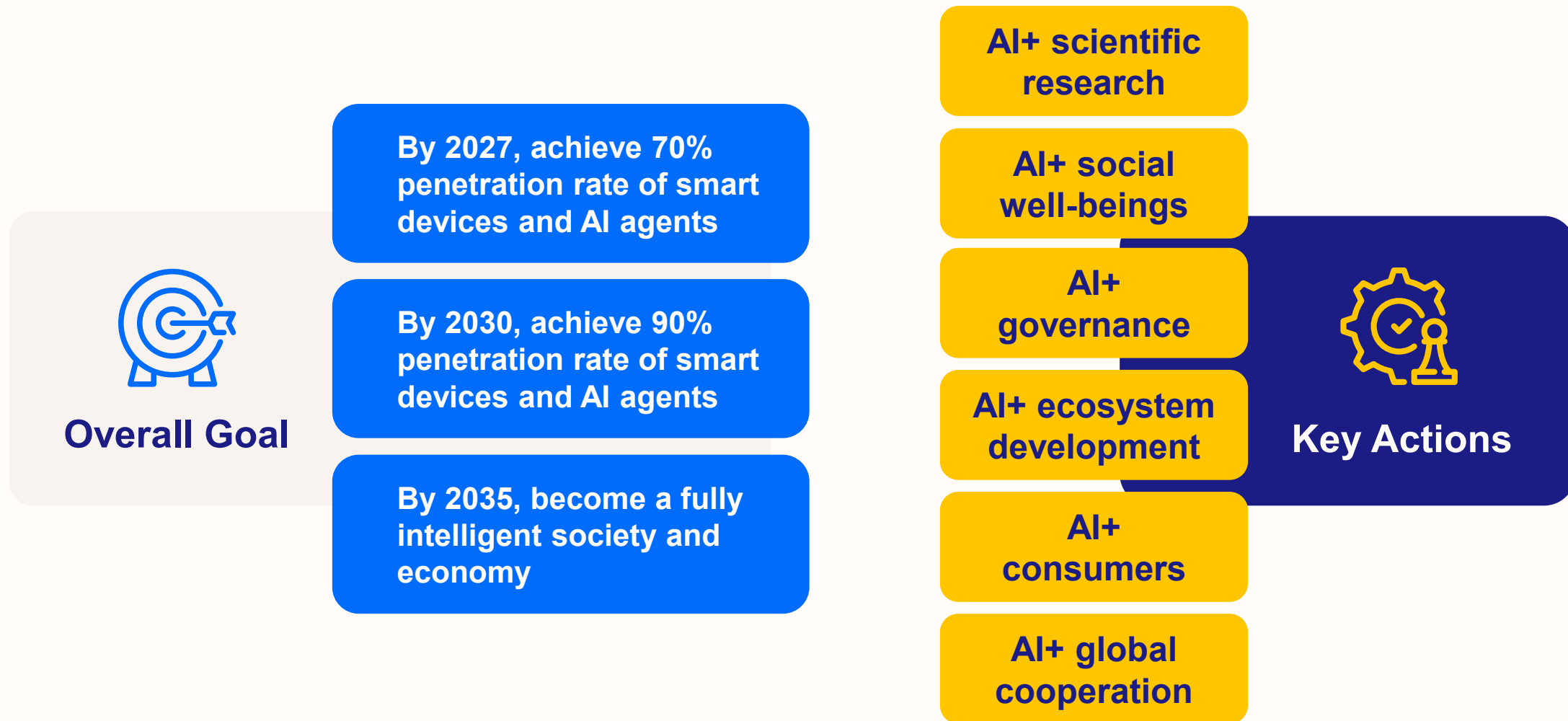- 26-27: rise of web-based application
- 28-29: mobile based applications

Market Landscape
- New players creating more complex competitive landscape
- Top vendors creating international version allowing use of Claude, Gemini, Grok, GPT

China's AI+ Strategy

Overall Goal

By 2027, achieve 70% penetration rate of smart devices and AI agents

By 2030, achieve 90% penetration rate of smart devices and AI agents

By 2035, become a fully intelligent society and economy

AI+ scientific research

AI+ social well-beings

AI+ governance

AI+ ecosystem development

AI+ consumers

AI+ global cooperation

Key Actions

Looking Ahead

Cloud and AI vendors will continue investing into Multi-Modal & Open Source

Agents developing rapidly, large vendors focusing on development platforms, ecosystem also in healthy development

Multinational vendors banning Chinese users pushing faster development of local capabilities
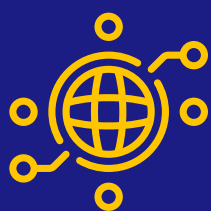
Major AI vendors are venturing into global markets: Code assistance, text to video

Favorable policies will further enhance AI technology deployment

Technology independence gathering pace

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