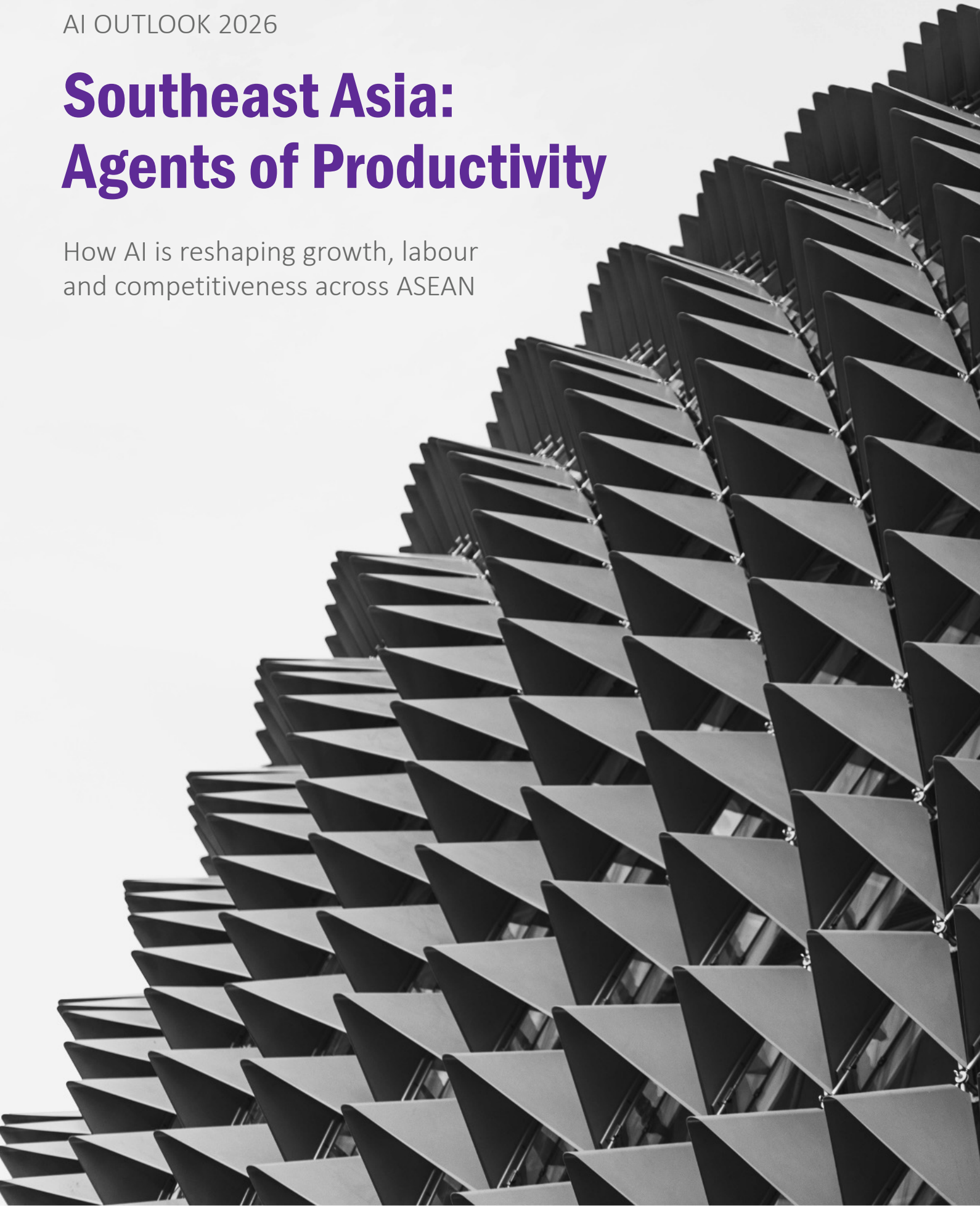




AI OUTLOOK 2026

Southeast Asia: Agents of Productivity

How AI is reshaping growth, labour
and competitiveness across ASEAN



Overview

From Digital Adoption to Intelligent Execution

SEA is transitioning from rapid digital consumption to intelligent production systems. AI adoption is accelerating across fintech, e-commerce, manufacturing, logistics and public services, but fragmented readiness, infrastructure gaps and talent asymmetry will define uneven outcomes.

40-45%

firms using AI

23%

are deep adopters

40-60%

cite AI skills shortage

11.2%

CAGR in cloud/data-centre build-out (23–29)

+13-18%

of ASEAN GDP by 2030
(AI potential)

\$120b

projected incremental GDP contribution from AI by 2027

Sources: IDC Asia, aws, BCG, ERIA



AI & Productivity transformation engine

AI & GDP acceleration

AI is rapidly shifting from an operational enhancement tool to a structural growth engine across Southeast Asia's export-driven economies. In manufacturing-heavy nations such as Vietnam, Thailand and Indonesia, AI is redefining productivity through predictive quality control, intelligent demand forecasting and automated production scheduling. These capabilities raise output per labor hour, reduce material and energy waste, and shorten inventory cycles, directly strengthening trade competitiveness rather than simply cutting headcount.

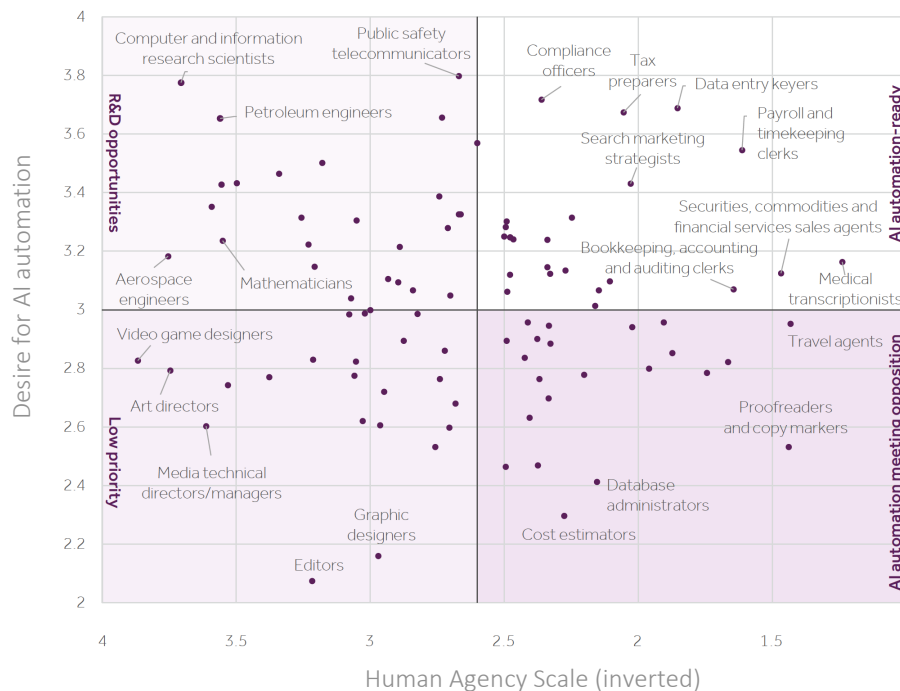
Beyond efficiency, AI enables resilience. In increasingly volatile supply chains, algorithmic planning and AI-driven scenario modelling allow firms to dynamically reroute sourcing, mitigate input shortages and adapt to fluctuating global demand in near real time.

In ageing economies such as Thailand and Singapore, where workforce contraction is starting to weigh on long-term growth, AI-driven automation can help mitigate labor shortages by enabling higher output with fewer workers while augmenting, rather than replacing, human roles.

Productivity re-engineering

AI is not merely replacing tasks; it is reorganizing how work itself is structured. The task-level analysis referenced here draws on US Bureau of Labor Stats data as a framework to understand how AI reshapes occupations, rather than as a direct measurement of Southeast Asian labor markets.

Similar patterns are emerging in export-oriented sectors across Southeast Asia, such as electronics manufacturing, automotive supply chains and logistics hubs, where AI systems reallocate tasks between humans and machines and shift human roles toward higher-judgment, higher-value activities.



Investment momentum: Capital is flowing in AI

Global AI startup breakthrough

2024 marked a historic inflection point in AI venture activity, with capital concentrating around infrastructure-heavy and platform-centric models rather than broad-based experimentation. This acceleration signals an investor shift from “testing the waters” to backing AI businesses that can scale into category leaders.

	2020	2021	2022	2023	2024	2025 - Sept
Business processes & support services	216	652	208	147	336	569
Digital security	1	48	151	79	128	258
Education and training	14	108	34	38	22	54
Financial and insurance services	3	2	56	77	117	109
Healthcare, drugs and biotechnology	184	158	235	133	1,024	848
IT infrastructure and hosting	48	3,696	407	3,092	21,833	8,336
Media, social platforms & marketing	239	1,041	533	11,111	12,087	18,826
Mobility and autonomous vehicles		78		2	200	3
Other	676	1,284	952	1,254	1,105	768
Robots, sensors and IT hardware	60	85	219	247	1,347	801
All industries	1,441	7,151	2,795	16,177	38,198	30,571

Venture capital investment in generative AI across industries is shown in USD million. Shading reflects the size of venture capital investments over time for each industry, with larger sizes shown as darker shades.

Capital backs scalable products

To gauge when today’s AI investment will translate into real economic value, it is useful to look at typical funding and scaling timelines. Software-based AI ventures, particularly in infrastructure and developer platforms, often progress from Seed to Series B within roughly 18-30 months when they show strong product-market fit and efficient growth. In more regulated domains such as financial services and digital security, funding cycles and commercialization paths are usually longer because of compliance and integration friction.

Hardware-driven AI startups, including those in robotics, sensors and specialized computing, generally require more capital and time, with three to five years often needed before reaching meaningful commercial scale.

Taken together, these patterns point to a wave of software-centric, generative-AI products maturing into scaled deployments through 2026–2027, followed by a second wave of hardware-intensive AI solutions reaching broader market adoption in 2027–2028.

Look forward

SEA on the verge of intelligent growth

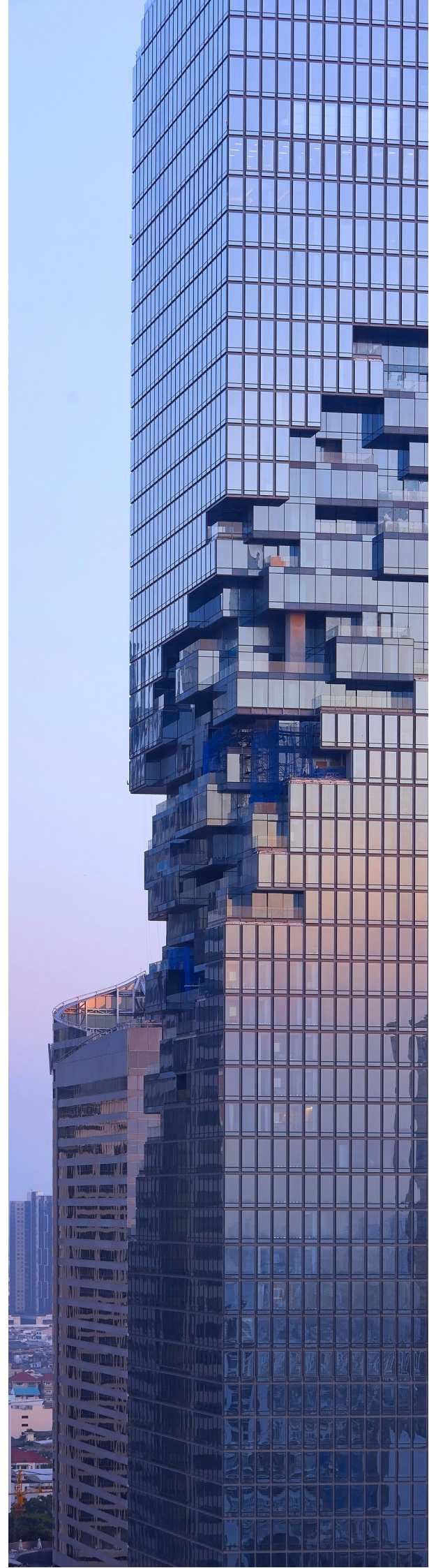
As software-centric AI ventures scale in 2026–2027 and hardware-driven solutions follow, Southeast Asia stands at the cusp of a productivity transformation. The convergence of capital, talent, and technology is enabling companies to move beyond experimentation and integrate AI directly into core business operations, unlocking new efficiencies and creating competitive advantages across industries.

AI is poised to become a catalyst for economic growth, driving smarter finance, logistics, manufacturing, and service sectors. The investments maturing today are the foundation for a region-wide shift in how businesses operate, compete, and innovate. Companies that deploy AI strategically will redefine operational benchmarks, while ecosystems that foster collaboration between startups, corporates, and policymakers will accelerate the pace of adoption.

Southeast Asia's opportunity lies not only in adopting AI, but in reshaping its economic architecture by using AI to leapfrog traditional productivity constraints and strengthen its global relevance.

Our mission

We aim to accelerate Southeast Asia's AI-driven transformation by supporting scalable startups, enabling businesses to integrate intelligent technologies, and fostering ecosystems that convert innovation into measurable productivity gains.



Thank you!

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