打造越南人工智能初创企业

抓住东南亚下一波创新浪潮

Antler 观点：创业者如何在越南借势高杠杆机遇走向全球

越南正成为东南亚初创圈最值得挖掘的“隐秘机遇”。

越南不仅拥有东南亚顶尖的技术人才和更具竞争力的运营成本，更受益于快速扩张的区域贸易网络。这里既能作为AI企业验证商业模式的理想试验场，更能助力企业家破解东南亚市场在新发展阶段面临的各项挑战。

越南：GenAI初创企业的战略枢纽

越南雄踞东盟 GenAI

位居第二

占东盟初创企业总数的27%（仅次于新加坡）[1]

AI初创融资增长

8倍

从1000万美元增至8000万美元（2023-2024年）[2]

市场规模

450亿美元

数字经济市场 2025 年预期值 [3]

AI 人才

70,000+

越南AI与数据专业人才成本仅为西方市场的⅓至 1/5 [4]

Source:
[1] GenAI Report 2024
[2] Vietnam Innovation & Private Capital Report, May 2025
[3] International Trade Administration Market Guide, 2024
[4] Vietnam National Innovation Center (NIC), 2024

四大“AI金矿”领域

东南亚基础设施发展不均衡现状为颠覆性AI企业提供了独特的机遇

跨境贸易与供应链优化

越南正崛起为战略贸易枢纽 （目前已签署20项自由贸易协定，年出口额达4240亿美元），并在跨国企业推行的"中国+1"战略中扮演日益关键的角色。

随着全球企业加速供应链多元化布局，越南已成为贯通亚太、欧洲与美洲三大市场的战略支点。这一趋势为人工智能驱动的物流系统、合规管理及基础设施创新创造了巨大机遇。

人工智能与制造 业的深度融合

越南堪称亚洲增长最迅猛的制造基地 - 这里汇聚了纺织、电子和工业设备领域的全球代工巨头。

然而在强劲的出口表现背后，却隐藏着基础性效率的短板：老旧的生产设备、依赖人工的质检环节以及过时的工作流程。这些因素严重制约了生产效率。

随着劳动力成本持续攀升，加之全球采购商对供应链可追溯性的严格要求，越南工厂正面临迫切的数字化转型压力。

金融基础设施

越南的消费者支付网络已被二维码支付系统和电子钱包全面覆盖，但面向企业服务、跨境商贸和现代金融业务的基础设施仍处于严重欠发达状态。

基础设施级金融科技将成为下一个关键突破方向。

智慧农业与贸易科技

越南农业约占GDP的12%，但利润微薄且物流分散。

初创企业可升级冷链系统、为生产者引入嵌入式金融科技，或构建具备溯源追踪、合规管理和履约能力的出口支持平台。

跨境贸易与供应链

市场规模数据

越南物流产业规模

- 2024年:300亿美元
- 2033年预计达:400亿美元（CAGR 3.8%)

物流产业对越南经济的贡献

- 规模占比:GDP的5.17%(东盟第二)

越南跨境电商出口业务表现

- 2022年:33亿美元
- 2027年预计达:110亿美元（5年内增长3.3倍)

全球贸易数字化市场展望

- 2027年预计规模:超390亿美元
- 核心增长区:东南亚

Source: Appendix Section 1, page 14

核心投资信念:

- AI驱动的海关与关税追偿工具來降低合规摩擦和退回多缴关税
- 专为东南亚多式联运通道量身定制的智能货运编排平台
- 为需要配额管理、文件和法规调整的出口商提供合规即服务 API
- LLM 驱动的 HS 代码分类引擎可消除人为错误并减少海关延误

> *随着边境开放程度提升，贸易系统效率必须同步升级。越南已做好准备，从内而外引领下一代贸易技术创新。*
>
> **- Erik Jonsson,**
> 普通合伙人, Antler越南

人工智能与制造 业的深度融合

市场规模数据

- 制造业占越南GDP的约25%(2024年)
- 越南工业 4.0 市场预计将以 10.7% 的年复合增长率增长(2025-2033 年)
- 越南制造业获得的外商直接投资(FDI 超过 200 亿美元 (2023 年). 其中韩国、日本和中国居首位
- 在越南, 80% 以上的工厂都是中小型企业並且使用过时或半手工操作的系统
- **热门行业**: 纺织、电子、家具和机械原始设备制造商
- 工业区正面临工资上涨和劳动力短缺的
- 问题

Source: Appendix Section 2, page 14

核心投 资信念:

- 基於人工智能的質量控制, 用於測量、電子組裝及安全檢測, 優先追求速度與精準度
- 利用工厂多层智能体与数字孪生系统來优化任务、减少闲置时间并扩大运营规模
- 改造套件和即插即用模块可将使用10-20年的设备数字化
- 基于LLM的报告与合规辅助系统來简化日志记录、采购审计、ESG及溯源文档管理

> *越南的数据是該国的自然资源。其人工智能技术应当在本土完成研发、建设、运行, 为越南人民和越南工业服务。*
>
> **- 黄仁勋, NVIDIA创始人兼首席执行官**

金融基础设施

市场规模数据

越南金融科技市 场规模

- 2024年：169亿美元（预计到 2033 年将以 14.2% 的年复合增长率增长）

越南业务流程外包市 场规模

- 2025年：6.39亿美元（以 4.8% 的年复合增长率增长，推动对工作流程嵌入式支付的大量需求)

越南企业的现状

- 越南约有 85 万家中小企业，但 98% 仍在使用电子表格
- 人均保费/GDP占比约2%，较东南亚地区同业水平明显偏低
- 在2024年，4,055 亿美元的出口额和跨境贸易额的增長超过了金融工具的发展速度

Source: Appendix Section 3, page 14

核心投资信念:

- 提供後端運營一站式平台，整合支付功能、多幣種錢包、應收付帳款（AP/AR）、薪資稅務通道及數位託管服務
- 跨境貿易融資與支付API解決方案，針對出口商及數位平台，整合KYC合規審查功能
- 医疗 BNPL 和收入周期自动化解决方案，可直接对接诊所/医院计费系统，实现患者融资变现
- 支持多银行账户对账、实时现金流预测和外汇优化的 AI 智能记账和资金管理辅助系统
- 针对物流、零工经济和农业中小企业的嵌入式微型保险

> *AI驱动的金融科技将成 为东南亚数字经济的支柱*
>
> **- Herston Powers,**
> 创始合伙人，1982 Ventures

智慧农业与贸易科技

市场规模数据

- 越南每年的农产品出口额超过 624 亿美元(2024 年),主要产品有大米、海产品、咖啡、榴莲等。
- 农业占越南劳动力总数的27%(2023年)
- 越南冷链物流市场规模预计将在2026年突破102亿美元
- 市场对 ESG 和合规追溯的需求日益增长
- 在越南,60-70% 的农业生产正通过非正规、非数字化渠道流动

Source: Appendix Section 4, page 15

核心投资信念:

- 冷链物流AI智能系统來优化最后一公里运输的货物集拼、控制损耗率及路径规划
- 智慧B2B农业出口平台來连接农村供应商与城市买家及出口市场,并提供信贷、数据协同和履约支持工具
- 农业供应链数据对接平台來实时联通农场库存与东南亚新兴农业电商及跨境卖家
- 农业出口商ESG与溯源工具:助力越南生产商符合全球新规(如欧盟《零毁林法案》)

> *要改变行业格局,我们必须创新。科学技术与数字化转型已不再是可选项,而是根本要素。*
>
> **- 杜德维,**
> 越南农业与环境部长

ANTLER被投企业 | 精选AI企业

从零起步，支持創始人打造未来国际性企业

我们持续投资于用AI解决区域痛点的定 义赛道者

farmio

Farmio致力于提升食品供 应链的效率和可持 续性。它同时服务零售端与餐饮企业，并提供供 应链SaaS解决方案，推 动食品行业的数字化转型。

inflow

时尚品牌的供 应链与制造平台——让中小型DTC品牌也能 拥有Zara、H&M、Nike等头部品牌的制造与供应链管理优势

Civils.ai

建筑项目的 AI 大脑，将文件与 图纸中的复 杂数据直接提取并 导入工作流程 —— 为每一次投标与项目节省数小时。

earlybird

一个由 AI 驱动的财务副驾驶员，既能担任会 计，也能作 为初创阶段的首席财务官，根据你的成 长阶段量身打造财务运营方案。Earlybird 重新定义了财务顾问的角色，致力于成为你最可信 赖的商业财务伙伴（BFF）。

TRUSTAI

人工智能研究 实验室运营商，致力于攻克构建超人 类智能的关 键技术难题。公司采用能力开 发与安全防护并行的技术路线，旨在打造可安全扩展的超级智能系统。

fileAI

fileAI 是领先的人工智能自 动化解决方案提供商，能 够将任何文件端到端处理并直接 导入任意系 统，无需人工干 预。

JigsawStack

提速十倍的API解决方案——JigsawStack精心打造的高性能 API平 台，提供卓越开 发者体验（DX）与极速响 应，助您以 1/10的成本和耗 时完成产品交付

CapGo.ai

通过程序化方式聚合网 页数据和 10 多个数据 库，在智能表格中 简化线索管理，实现规模化的潜在客 户筛选与个性化 邮件撰写。

与其观望越南崛起，不如主导这场科技革命。

当下是布局东南亚GEN AI的最佳时机

AI正迎来它的“互联网-1998”时刻，而东南亚拥有最强劲的風頭与最广阔的机遇落差。

如今，创业者能在数周（而非数月）内完成产品原型验证，延长资金跑道，并通过基于低资源区域语言或垂直领域数据的模型训练，建立起全球领先平台企业难以复制的竞争壁垒。

迅速崛起的科技 创新生态

根据Dealroom《2025全球科技生态指数》显示，胡志明市在企业价值增长和独角兽企业数量方面均位列全球前十强城市

人才与成本的双重套利

越南资深AI工程师成本仅为美国同等级人才的20%。

自 2024 年以来，人工智能计算成本下降了 75%，从每百万代币 10 美元降至 2.50 美元。

政策支持与 经济趋势双重助力

新加坡、越南、马来西亚和泰国相继制定了国家人工智能战略，通过非股权稀释性资金支持与清晰的监管框架，有效降低企业落地执行风险。

Source: Appendix Section 5, page 15

定义未来：与最活跃早期投资人同行

加入全球顶尖创业社群，通过6周加速计划，优胜团队将获得我们的战略投资

1

战略赋能型资本

通过预种子轮的融资及后续轮次的选择性跟投，获得Antler从首日开始的全程支持。

2

行业领先的资本部署速度

在人工智能行业领导者的独家指导和资源支持下，创始人将在 6 周内完成从创意到落地的过程，并通过量身定制的基础设施信贷实现更智能、更快速的规模增长。

3

全球深度的 资源网络

依托 Antler 的初创企业集群与跨国节点，突破地域市场限制

我们重点关注的 创始人特征

✅**跨境实战专家——具备多国市场的贸易拓展、供应链管理或规模化生产经验**

✅**销售体系操盘手——曾统领规模化高增速营收团队**

✅自动化原生代——**RPA构建专家、AI编排与代理专家**

✅**高效技术型创始人——能够快速构建，并拥有征服全球的野心**

把握好当下的时机。请联系我：*erik.jonsson@antler.co*

打造未来国际性企业

以越南为起始点，重构东南亚的未来

ANTLER

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The Company does not represent or warrant that actual future results, performance or achievements will be as discussed in those statements. The Company disclaims any responsibility to update any of those forward-looking statements any revisions to those forward-looking statements to reflect future developments, events or circumstances for any reason, even if new information becomes available or other events occur in the future.

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