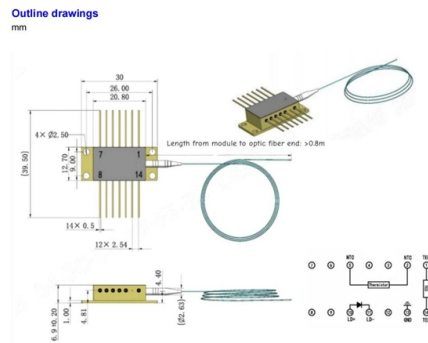


Domestic AI Computing Servers See Explosive Growth



Overview

Chinese server and chipmakers are entering a 'super cycle' as local governments pour money into AI-related computing infrastructure. The AI Computing Power Concept Index, compiled by Wind and tracking 54 related stocks, reached a record high on August 25, 2025, up 166%. Ever since China's DeepSeek artificial intelligence (AI) chatbot made headlines in January, the country's cloud computing and internet industries have been racing to develop AI for consumers and businesses, according to Goldman Sachs Research. Our analysts expect power demand from China's data centers. The AI data center market is growing at 28.3% CAGR, far outpacing traditional data centers. Amazon has. Artificial intelligence has developed rapidly in recent years, with tech companies investing billions of dollars in data centers to help train and run AI models. The expansion of data centers has raised questions on several fronts, including the effect these facilities may have on energy and the. Major stock indices in the Chinese mainland reached multi-year highs on Monday, fueled by the booming artificial intelligence (AI) and semiconductor sectors. IDC data shows that the scale of China's accelerated server market will reach US\$5 billion in the first half of 2024, a year-on-year increase of 63% from the first half of 2023. These figures were not only significantly lower than the market's previous.

Article Content

American AI Companies Can't Get Enough Chips | CNAS

Introduction Artificial intelligence (AI) chips are critical for AI progress, and American AI companies can't get enough of them. They provide the computing power—that is, the ...

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CITIC Securities noted that the explosive surge in demand for AI computing power has driven strong exports of products across the semiconductor industrial chain, making this category the ...

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To sum up, with the development of AI technology and the popularization of applications, the AI server market has shown a steady growth trend, and the non-GPU server market has grown ...

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We spoke with Keung and Zhao about power demand from Chinese data centers, growth in the country's supply chain for AI, and how companies are generating revenue from the technology.

How data centres and AI are becoming a new engine of growth

AI-driven investment in data centres is boosting US GDP, led by hyperscalers like Microsoft and Meta, as growth and weaker jobs hint new productivity gains.

Chinese server, chipmakers enter "super cycle" as gov't boosts AI

Chinese server and chipmakers are entering a "super cycle" as local governments pour money into AI-related computing infrastructure. The AI Computing Power Concept Index, compiled ...

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