

A New Wave of AI Server Demand Ignites



Overview

TrendForce's latest analysis of the AI server market shows that demand from CSPs and sovereign cloud deployments will remain robust through 2026. This momentum will fuel stronger pull-ins for GPUs and ASICs, alongside the rapid expansion of AI inference applications. As the customer base. The enterprise adoption of AI-optimized servers is fueling revenue surges at both Dell Technologies and Hewlett-Packard Enterprise (HPE) despite ongoing economic and trade uncertainties. In its Q2 FY 2026 earnings call, Dell's Chief Operating Officer Jeff Clarke stated, "We have shipped more AI. AI momentum - Global AI server shipments are projected to rise 24. 3% in 2025, slightly below forecasts due to U. export restrictions and geopolitics. Cloud strategies - AWS, Google, Microsoft, Meta and Oracle are expanding AI infra with varying mixes of Nvidia GPUs and in-house chips. The Dell corporate logo in Bracknell, England, on Jan. AI server revenue is projected to grow by more than 30% in 2026, accounting for 74% of total server market value.



Article Content

AI Server Market Size & Share, Statistics Report 2025

AI training servers continue to evolve as the demand for deep learning, generative AI and large language models increases across industries. These servers are

TrendForce: Strong CSP, Cloud Demand to Fuel Over

Demand from CSPs and sovereign cloud deployments will remain robust through 2026, according to a latest report by TrendForce. This momentum

Next wave of cloud and AI adoption to drive demand for advanced

In the fast-evolving tech landscape of 2025 and beyond, the global AI server market is entering a fresh phase of expansion—driven by robust cloud spending and new heights in AI adoption.

Strong Demand from CSPs and Sovereign Cloud to

TrendForce's latest analysis of the AI server market shows that demand from CSPs and sovereign cloud deployments will remain robust through

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Shares of Comfort Systems USA (NYSE: FIX) surged to a new all-time high of \$1,468.18 on February 20, 2026, following a blowout fourth-quarter earnings report that underscored the

AI Server Market Update: Vendors Shift from Silicon to Services

The AI server market continues its explosive growth, fueled primarily by demand for GPUs – particularly from Nvidia. As the customer base broadens beyond hyperscalers and

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The global buildout of artificial intelligence data centers is driving a new wave of demand for high-speed networking infrastructure, as the efficiency of communication between servers becomes ...

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AI agents now sit between brands and consumers, comparing products, evaluating warranties, choosing a winner and completing purchases—autonomously, in seconds. It's a generational reset of the rules

RD Perspectives on Microsoft Ignite 2025: Opportunities Shaping the ...

Microsoft Ignite 2025 marked a shift in enterprise AI. Microsoft Regional Directors share how these advances transform operations, strengthen security, and create new opportunities.

Panasonic raises tantalum capacitor prices, following

There are only a limited number of tantalum capacitor suppliers worldwide, and with most of them maintaining a conservative stance on capacity

Microsoft Ignite

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IGNITE ON TOUR

Securely Unleash What's NextThe next wave of innovation is here. AI is reshaping our world, creating a new digital way of life and unlocking unprecedented

EZconn sets record gross margin as AI demand fuels optical ...

Benefiting from the surge in AI server demand, optical communication manufacturer EZconn has joined the growth wave. In the first half of 2024, its consolidated revenue reached

AMD Lifts Server CPU Outlook to 35%+ CAGR, \$120B by

As inference AI fuels a fresh wave of CPU demand, chip giant AMD posted a 57% YoY jump in first-quarter data center revenue—covering both server CPUs and AI accelerators—to

AI Server Demand Ignites! Dell's Earnings Crush Expectations, Stock ...

Fueled by strong demand for artificial intelligence (AI) data centers, global PC and server giant Dell Technologies (DELL) released impressive earnings and an optimistic outlook last Friday

What's New for Fabric Data Agents at Ignite 2025: ...

But the story doesn't end there. This week, we're introducing new integrations that take the interoperability of Fabric data agents to the next level. Hosted MCP Server for data agents Now,

Geopolitical pressures are impacting AI server growth - but

Global demand for AI servers remains strong in 2025, with "tier-one" North American cloud service providers (CSPs) continuing to lead market growth, according to new analysis from market

AI Server Boom: Dell, HPE and Nvidia Riding The Wave

The AI server boom accelerates in 2025 as Dell, HPE, and Nvidia invest heavily in high-performance AI infrastructure, driving faster innovation.

FinancialContent

Micron Shakes Semiconductor World with Record \$23.9 Billion Revenue as AI "Supercycle" Ignites Insatiable Memory Demand By: MarketMinute March 24, 2026 at 17:14 PM EDT

AI Computing Demand Surges Continuously: Global AI Server

Research institution TrendForce stated in its latest report that the global AI servers market is experiencing a new wave of growth. It is expected that the global AI servers shipment will

AMD Stock Price Forecast

AMD Stock Price Forecast - AMD Surges Toward \$300 as, Multi-Billion AI Deals Ignite Next Growth Wave With Q3 revenue up 36% to \$9.25B

Geopolitical Tensions Fuel a Wave of AI Chip Independence as US

TrendForce's latest research reveals that the surge in demand for AI servers is accelerating the pace at which major US CSPs are developing in-house ASICs, with new iterations

Meta Reportedly Teams Up with Broadcom,

Following its 2025 capex hike, Meta isn't slowing down. According to the Economic Daily News, the cloud giant will deploy a new wave of custom

Dell, HPE reap revenue gains from AI server demand

Dell and Hewlett Packard Enterprise got revenue boosts from growing enterprise demand for AI-optimized servers despite the economic uncertainty

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AI server demand is pushing semiconductor packaging into a new growth cycle, but the market remains heavily concentrated among a small...

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