

Global Artificial Intelligence PCB Market Research Report 2026(Status and Outlook)

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Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on Artificial Intelligence PCB competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. Artificial Intelligence PCB are high-performance printed circuit boards designed specifically for AI computing devices. Through specialized structures and optimized materials, they meet the stringent requirements of AI hardware (such as GPUs, TPUs, and AI accelerator chips) for high-speed data transmission, high-density integration, and energy-efficient management. By 2024, global AI PCB production is projected to reach 100,000 square meters, with an average selling price of US\$3,000 per square meter. The industry's gross profit margin is approximately 30%-50%, with a production capacity of 400,000 square meters. The artificial intelligence PCB industry chain forms a highly coordinated closed-loop system with upstream raw materials, midstream substrates and manufacturing, and downstream applications as the core. In terms of upstream raw materials, copper foil is divided into electrolytic copper foil and rolled copper foil. Electrolytic copper foil is the mainstream (accounting for about 40% of the cost), and rolled copper foil is used in high-end scenarios such as high frequency and high speed (the technology is dominated by Japanese companies); the resin is mainly epoxy resin (accounting for more than 70% of the resin used in copper clad laminates). The demand for AI servers drives the application of high-end resins such as PPO, hydrocarbons, and PTFE; glass fiber cloth provides mechanical strength, high-end low dielectric (Low DK) and low thermal expansion (Low CTE). The demand for CTE fiberglass cloth has surged, and the technical barriers are high (such as NER-Glass from Japan's Nitto Boshu); copper clad laminate (CCL) is the core substrate of PCB (accounting for 40% of the cost), and is divided into rigid (communications, consumer electronics) and flexible (flexible equipment). The high-end market is dominated by

Taiwanese and Japanese companies; in terms of midstream substrates and manufacturing, copper clad laminate manufacturing is done by impregnating glass fiber cloth with resin and hot-pressing copper foil. The technology iteration is evolving towards high frequency, high speed and low loss (such as M7 and M8 grade copper clad laminates). In PCB manufacturing, high- and medium-layer boards are AI server GPU substrates that require a design of more than 20 layers. The increase in the number of layers improves signal transmission stability. In terms of high-end packaging, the HDI board uses laser drilling to achieve a micro-blind buried hole structure, which is suitable for AI accelerator modules (such as 4-5 order HDI) and supports high-density wiring. The packaging substrate is the "bridge" connecting the chip and the PCB. It accounts for more than 70% of the cost in high-end packaging and has extremely high technical barriers (such as ABF substrates). In terms of downstream applications, the value of a single PCB for an AI server is 5,000 yuan, and the demand for GPU substrates, accelerator cards, and motherboards has surged. The autonomous driving system of smart cars requires high-end PCBs such as millimeter-wave radars, with a value of more than US\$200 per vehicle. The demand for high-frequency and high-speed PCBs for 5G base stations and optical modules of communication equipment continues to grow.

The global Artificial Intelligence PCB market size was estimated at USD 305.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 19.10% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Artificial Intelligence PCB market, covering all critical facets from a broad macroeconomic overview to detailed micro-level insights. It examines market size, competitive landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the industry and formulate effective strategies to enhance profitability and market positioning. Additionally, the report presents a clear framework for evaluating the current status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global Artificial Intelligence PCB market. It offers detailed profiles of major players, including their market shares, performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced understanding of market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the Artificial Intelligence PCB market.

Global Artificial Intelligence PCB Market: Market Segmentation Analysis

This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type, and application. Market segmentation divides the overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

Key Company

Pengding Holdings
Nippon Mektron
Victory Giant Technology
HoYoGo
TTM Technologies
AT&S
Xinxing Electronics
Jinding Technology
MEIKO
Dongshan Precision
Shennan Circuits
Guanghe Technology
Shengyi Electronics
Jinwang Electronics

Market Segmentation (by Type)

Single-sided PCB

Double-sided PCB
Multilayer PCB

Market Segmentation (by Application)

Consumer Electronics
Robotics and Automation Systems
Healthcare
Smart Transportation and the Internet of Things
Other

Geographic Segmentation

North America (USA, Canada, Mexico)

Europe (Germany, UK, France, Russia, Italy, Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)

South America (Brazil, Argentina, Columbia, Rest of South America)

The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

Key Benefits of This Market Research:

Industry drivers, restraints, and opportunities covered in the study
Neutral perspective on the market performance
Recent industry trends and developments
Competitive landscape & strategies of key players
Potential & niche segments and regions exhibiting promising growth covered
Historical, current, and projected market size, in terms of value
In-depth analysis of the Artificial Intelligence PCB Market
Overview of the regional outlook of the Artificial Intelligence PCB Market:

Customization of the Report

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Chapter Outline

Chapter 1 mainly introduces the statistical scope of the report, market division standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the Artificial Intelligence PCB Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 shares the main producing countries of Artificial Intelligence PCB, their output value, profit level, regional supply, production capacity layout, etc. from the supply side.

Chapter 10 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 11 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 12 provides a quantitative analysis of the market size and development potential of each market segment in the next five years.

Chapter 13 is the main points and conclusions of the report.

Key Reasons to Buy this Report:

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change

This enables you to anticipate market changes to remain ahead of your competitors

You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business

expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis

Provides insight into the market through Value Chain

Market dynamics scenario, along with growth opportunities of the market in the years to come

6-month post-sales analyst support

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