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Global AI Server OEM/ODM Market 2026 by Company, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global AI Server OEM/ODM market size was valued at US$ 4130 million in 2025 and is forecast to a readjusted size of US$ 13397 million by 2032 with a CAGR of 18.4% during review period.

AI server OEM/ODM refers to a business model in which specialized server manufacturers handle the design translation, component procurement, production and assembly, testing and validation, and delivery of AI server hardware systems, based on the design specifications provided by chip vendors, cloud service providers, internet companies, system integrators, or end customers. These services primarily center on the large-scale manufacturing of AI computing servers, encompassing products such as GPU/AI accelerator servers, training servers, inference servers, high-density computing nodes, and AI infrastructure servers.

Key Findings

GPU AI server manufacturing represents the largest value segment in the market

Asia Pacific is the core manufacturing region for AI server OEM/ODM supply chains

AI server ODM companies focus on high-density computing, liquid cooling and system integration capabilities

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Market Trends

The AI Server OEM/ODM industry is transitioning from traditional server assembly toward integrated AI infrastructure manufacturing. As AI models become larger and computing requirements increase, server manufacturers are strengthening capabilities in GPU integration, high-speed networking, liquid cooling, power management and rack-scale system delivery. Customer demand is shifting from standardized server production toward customized AI computing platforms with optimized performance, reliability and rapid deployment capabilities.

Market Dynamics

Drivers

The rapid expansion of generative AI, large-scale AI model training, enterprise AI deployment and cloud computing infrastructure is driving demand for AI Server OEM/ODM services. Cloud service providers, AI companies and data center operators increasingly require large-scale customized AI computing systems, encouraging manufacturers to enhance production capacity, engineering capabilities and supply chain coordination.

Restraints

The AI Server OEM/ODM market faces constraints from high component costs, limited availability of advanced AI chips, complex thermal management requirements and increasing system integration difficulty. High-performance GPU platforms require sophisticated power supply, cooling and networking solutions, increasing manufacturing complexity and investment requirements.

Opportunities

Growing demand for AI infrastructure expansion, liquid-cooled AI servers, rack-scale computing systems and customized AI platforms provides new opportunities for OEM/ODM manufacturers. The increasing adoption of enterprise AI applications, AI agents and industry-specific computing solutions may further expand demand for specialized AI server manufacturing services.

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Challenges

The industry faces challenges related to supply chain stability, rapid technology updates, customer concentration risks and the need for continuous manufacturing capability upgrades. Manufacturers must maintain close collaboration with chip suppliers, cloud customers and component ecosystems while balancing production efficiency, cost control and technological compatibility.

Industry Chain Analysis

The AI Server OEM/ODM industry chain includes upstream suppliers of AI processors, GPUs, CPUs, memory modules, storage components, networking equipment, power systems and thermal management solutions; midstream manufacturers provide server architecture design, hardware integration, production manufacturing, testing validation and supply chain management services; downstream customers include cloud service providers, AI model developers, enterprises, research institutions and data center operators. Value creation mainly comes from integrating high-performance computing components into reliable AI server systems while improving manufacturing efficiency, deployment speed and system performance. Cost structure is mainly influenced by AI accelerators, memory components, power systems, cooling solutions, manufacturing processes and customized engineering services.

Segment Insights

AI Server OEM/ODM can be segmented by manufacturing model, server type, accelerator architecture and application requirement. ODM-based manufacturing represents a major business model due to its involvement in server design optimization, supply chain coordination and large-scale production. Among product categories, GPU AI servers represent the largest value segment because of their dominant role in AI training and high-performance computing. Liquid-cooled AI servers, rack-scale AI systems and customized AI computing platforms are becoming important development directions as computing density continues to increase.

Downstream Market Opportunities

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The downstream market mainly includes hyperscale cloud providers, internet companies, AI model developers, enterprise data centers, research institutions and industrial AI users. Cloud computing and AI training infrastructure represent the core demand areas, while enterprise AI deployment, edge AI computing and industry-specific AI applications are creating additional opportunities. Customers increasingly require scalable, reliable and energy-efficient AI computing infrastructure to support expanding AI workloads.

Regional Insights

The global AI Server OEM/ODM market demonstrates strong regional concentration due to the distribution of server manufacturing capabilities, semiconductor supply chains and data center ecosystems. Asia Pacific represents the core manufacturing region, supported by mature server ODM capabilities, electronic manufacturing infrastructure and supply chain integration advantages. China Taiwan plays an important role in global AI server manufacturing through its server ODM ecosystem, while mainland China continues to expand AI infrastructure manufacturing capacity. North America represents a major demand market driven by cloud computing companies, AI technology companies and large-scale data center deployment. Europe is developing opportunities through enterprise AI adoption, research computing and data center expansion.

Competitive Landscape Analysis

The AI Server OEM/ODM market includes server ODM manufacturers, EMS providers, enterprise server companies and AI infrastructure solution providers. Competition is mainly based on server architecture design capability, GPU integration experience, supply chain management, manufacturing scale, thermal management technology and customer collaboration capability. The competitive landscape is increasingly focused on high-performance AI system integration, liquid cooling solutions, rack-scale delivery capability and the ability to support rapidly evolving AI computing requirements.

Report Scope

This report is a detailed and comprehensive analysis for global AI Server OEM/ODM market. Both quantitative and qualitative analyses are presented by company, by region & country, by Type and by Application. As the market is constantly changing, this report

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explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global AI Server OEM/ODM market size and forecasts, in consumption value ($ Million), 2021-2032

Global AI Server OEM/ODM market size and forecasts by region and country, in consumption value ($ Million), 2021-2032

Global AI Server OEM/ODM market size and forecasts, by Type and by Application, in consumption value ($ Million), 2021-2032

Global AI Server OEM/ODM market shares of main players, in revenue ($ Million), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for AI Server OEM/ODM

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global AI Server OEM/ODM market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Foxconn Technology, Quanta Computer, Wistron, Wiwynn, Inventec, Compal Computer, Pegatron, Gigabyte, Super Micro Computer, Dell Technologies, etc.

This report also provides key insights about market drivers, restraints, opportunities,

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new product launches or approvals.

AI Server OEM/ODM market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for Consumption Value by Type and by Application. This analysis can help you expand your business by targeting qualified niche markets.

Market segmentation

Market segment by Type

AI Server ODM Manufacturing

AI Server OEM Manufacturing

Others

Market segment by Server Product Type

AI Training Server OEM/ODM

AI Inference Server OEM/ODM

AI Edge Server OEM/ODM

Others

Market segment by Accelerator Configuration

GPU AI Server OEM/ODM

ASIC AI Server OEM/ODM

FPGA AI Server OEM/ODM

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Market segment by Application

Large Enterprises

SMEs

Market segment by players, this report covers

Foxconn Technology

Quanta Computer

Wistron

Wiwynn

Inventec

Compal Computer

Pegatron

Gigabyte

Super Micro Computer

Dell Technologies

Hewlett Packard Enterprise

Market segment by regions, regional analysis covers

North America (United States, Canada and Mexico)

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

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

South America (Brazil, Rest of South America)

Middle East & Africa (Turkey, Saudi Arabia, UAE, Rest of Middle East & Africa)

Chapter Outline

Chapter 1, to describe AI Server OEM/ODM product scope, market overview, market estimation caveats and base year.
Chapter 2, to profile the top players of AI Server OEM/ODM, with revenue, gross margin, and global market share of AI Server OEM/ODM from 2021 to 2026.
Chapter 3, the AI Server OEM/ODM competitive situation, revenue, and global market share of top players are analyzed emphatically by landscape contrast.
Chapter 4 and 5, to segment the market size by Type and by Application, with consumption value and growth rate by Type, by Application, from 2021 to 2032.
Chapter 6, 7, 8, 9, and 10, to break the market size data at the country level, with revenue and market share for key countries in the world, from 2021 to 2026.and AI Server OEM/ODM market forecast, by regions, by Type and by Application, with consumption value, from 2027 to 2032.
Chapter 11, market dynamics, drivers, restraints, trends, Porters Five Forces analysis.
Chapter 12, the key raw materials and key suppliers, and industry chain of AI Server OEM/ODM.
Chapter 13, to describe AI Server OEM/ODM research findings and conclusion.

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