

Global HBM for AI Accelerators Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global HBM for AI Accelerators market size is expected to reach \$ 215726 million by 2032, rising at a market growth of 27.9% CAGR during the forecast period (2026-2032).

HBM for AI accelerators is a high-bandwidth three-dimensional stacked dynamic random-access memory specifically designed for high-parallelism computing platforms. Through TSV vertical interconnection, ultra-wide I/O interfaces, multi-layer DRAM chip stacking, and collaborative design with a logic base die, it compresses the bandwidth bottleneck between traditional external memory and computing chips to the greatest extent possible within a limited packaging space, thereby continuously providing GPUs, AI ASICs, and supercomputing processors with high-throughput, low-power-consumption, and high-density data supply capability. Different from general-purpose or board-level memories such as DDR, LPDDR, and GDDR, HBM is not a standard memory module aimed at a wide range of terminal devices, but a key device for high-performance packaging systems. It is usually directly incorporated into system-level package design together with accelerator chips. Current HBM products already cover generations such as HBM3, HBM3E, and HBM4. Among them, the single-stack bandwidth of HBM3E has reached more than 1,180 GB/s, Micron's HBM3E exceeds 1.2 TB/s, and Samsung's HBM4 further increases the single-stack bandwidth to up to 3,300 GB/s. This product has become a core component in AI infrastructure that determines the upper limit of system throughput and energy-efficiency performance, and is no longer merely a high-end branch of traditional DRAM.

The primary function of HBM used in AI accelerators is to support model parameter access, tensor computation, and high-frequency data exchange through higher bandwidth, stronger parallel access capability, and better performance per watt. HBM

for AI accelerators has become a fundamental performance resource for large-model training, generative AI inference, AI servers, data centers, and supercomputing systems. Its technology roadmap is rapidly moving from HBM3 to HBM3E, and further toward HBM4 and subsequent HBM4E. The focus of upgrading is shifting from merely increasing stack height to improving thermal resistance, optimizing power consumption, enhancing compatibility with advanced packaging, and enabling customer-specific customization. The current market shows two clear characteristics. First, supply is highly concentrated, with Samsung, SK hynix, and Micron remaining the major global original manufacturers. Second, demand growth is far outpacing the normal memory cycle. Micron has already signed price and volume agreements covering its full-year 2026 HBM supply, while Samsung expects its HBM revenue in 2026 to grow by more than three times compared with 2025. This indicates that HBM has entered a rapid growth phase driven jointly by oligopolistic supply, long-term supply agreements, and generational product upgrades. The upstream side of HBM is highly dependent on advanced DRAM manufacturing, TSV processes, base logic dies, advanced packaging materials, test equipment, and thermal management solutions. Its downstream applications are directly connected to GPUs, AI accelerators, cloud computing infrastructure, server systems, and supercomputing platforms. Therefore, HBM market fluctuations are not determined by a single memory cycle, but are shaped by computing chip roadmaps, packaging capacity, data center investment cycles, and the policy environment. In the domestic market, China continues to promote the “Eastern Data and Western Computing” project and the “AI+” initiative, with a focus on intelligent computing power, data centers, and AI infrastructure. This will drive growth in AI server demand and indirectly stimulate demand for HBM and its supporting advanced packaging materials. In the international market, the United States is, on one hand, supporting Samsung, Micron, and other companies in expanding advanced memory capacity through the CHIPS Act, while on the other hand bringing HBM into the scope of advanced computing export controls. As a result, the global HBM market is being influenced by both capacity-expansion policies and export restrictions. The former is conducive to increasing long-term supply, while the latter will reshape regional flows, customer structures, and the competitive landscape of the market. Looking ahead, the price, output, and market size of HBM for AI accelerators are likely to show an overall trend of prices remaining at relatively high levels and output continuing to expand. In terms of pricing, HBM is constrained not only by front-end wafer capacity, but also by back-end advanced packaging, thermal management, testing and validation, and customer qualification cycles. Therefore, it is unlikely to quickly shift toward a fully competitive market in the short term. Over the next one to two years, the average selling price of HBM products is expected to remain high. Newer generations, higher-capacity products, and products with deeper customer validation will have stronger

pricing resilience. In the medium term, however, as HBM4 and subsequent products ramp up, packaging capacity improves, and the customer base expands, price competition will gradually shift from “absolute premium pricing” to “tiered pricing.” In terms of output, Samsung has clearly stated that it is expanding HBM4 capacity, Micron has indicated that its advanced HBM packaging facility in Singapore will make a meaningful contribution to supply in 2027, and SK hynix has also proposed expanding AI memory supply through manufacturing optimization and infrastructure construction. Therefore, total output is expected to continue rising. Overall, the core characteristic of HBM over the next several years will be structural high growth against the backdrop of expanding AI infrastructure.

This report studies the global HBM for AI Accelerators production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for HBM for AI Accelerators and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of HBM for AI Accelerators that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global HBM for AI Accelerators total production and demand, 2021-2032, (Million Units)

Global HBM for AI Accelerators total production value, 2021-2032, (USD Million)

Global HBM for AI Accelerators production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Million Units), (based on production site)

Global HBM for AI Accelerators consumption by region & country, CAGR, 2021-2032 & (Million Units)

U.S. VS China: HBM for AI Accelerators domestic production, consumption, key domestic manufacturers and share

Global HBM for AI Accelerators production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Million Units)

Global HBM for AI Accelerators production by Memory Generation, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

Global HBM for AI Accelerators production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

This report profiles key players in the global HBM for AI Accelerators market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies

covered as a part of this study include Samsung Electronics Co., Ltd., SK hynix Inc., Micron Technology, Inc., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World HBM for AI Accelerators market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Million Units) and average price (US\$/Unit) by manufacturer, by Memory Generation, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global HBM for AI Accelerators Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global HBM for AI Accelerators Market, Segmentation by Memory Generation:

HBM3

HBM3E

HBM4

Global HBM for AI Accelerators Market, Segmentation by Stack Height:

8-High

12-High

16-High

Other

Global HBM for AI Accelerators Market, Segmentation by Peak Bandwidth Per Stack Class:

Up To 819 GB/s

820 GB/s To 1.2 TB/s

Above 1.2 TB/s

Global HBM for AI Accelerators Market, Segmentation by Application:

Foundation Model Training

Online AI Inference

General-Purpose AI Compute

AI and HPC Converged Compute

Companies Profiled:

Samsung Electronics Co., Ltd.

SK hynix Inc.

Micron Technology, Inc.

Key Questions Answered:

1. How big is the global HBM for AI Accelerators market?
2. What is the demand of the global HBM for AI Accelerators market?
3. What is the year over year growth of the global HBM for AI Accelerators market?
4. What is the production and production value of the global HBM for AI Accelerators market?
5. Who are the key producers in the global HBM for AI Accelerators market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 HBM for AI Accelerators Introduction
- 1.2 World HBM for AI Accelerators Supply & Forecast
 - 1.2.1 World HBM for AI Accelerators Production Value (2021 & 2025 & 2032)
 - 1.2.2 World HBM for AI Accelerators Production (2021-2032)
 - 1.2.3 World HBM for AI Accelerators Pricing Trends (2021-2032)
- 1.3 World HBM for AI Accelerators Production by Region (Based on Production Site)
 - 1.3.1 World HBM for AI Accelerators Production Value by Region (2021-2032)
 - 1.3.2 World HBM for AI Accelerators Production by Region (2021-2032)
 - 1.3.3 World HBM for AI Accelerators Average Price by Region (2021-2032)
 - 1.3.4 United States HBM for AI Accelerators Production (2021-2032)
 - 1.3.5 South Korea HBM for AI Accelerators Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 HBM for AI Accelerators Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 HBM for AI Accelerators Major Market Trends

2 DEMAND SUMMARY

- 2.1 World HBM for AI Accelerators Demand (2021-2032)
- 2.2 World HBM for AI Accelerators Consumption by Region
 - 2.2.1 World HBM for AI Accelerators Consumption by Region (2021-2026)
 - 2.2.2 World HBM for AI Accelerators Consumption Forecast by Region (2027-2032)
- 2.3 United States HBM for AI Accelerators Consumption (2021-2032)
- 2.4 China HBM for AI Accelerators Consumption (2021-2032)
- 2.5 Europe HBM for AI Accelerators Consumption (2021-2032)
- 2.6 Japan HBM for AI Accelerators Consumption (2021-2032)
- 2.7 South Korea HBM for AI Accelerators Consumption (2021-2032)
- 2.8 ASEAN HBM for AI Accelerators Consumption (2021-2032)
- 2.9 India HBM for AI Accelerators Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World HBM for AI Accelerators Production Value by Manufacturer (2021-2026)
- 3.2 World HBM for AI Accelerators Production by Manufacturer (2021-2026)
- 3.3 World HBM for AI Accelerators Average Price by Manufacturer (2021-2026)

- 3.4 HBM for AI Accelerators Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global HBM for AI Accelerators Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for HBM for AI Accelerators in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for HBM for AI Accelerators in 2025
- 3.6 HBM for AI Accelerators Market: Overall Company Footprint Analysis
 - 3.6.1 HBM for AI Accelerators Market: Region Footprint
 - 3.6.2 HBM for AI Accelerators Market: Company Product Type Footprint
 - 3.6.3 HBM for AI Accelerators Market: Company Product Application Footprint
- 3.7 Competitive Environment
 - 3.7.1 Historical Structure of the Industry
 - 3.7.2 Barriers of Market Entry
 - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

- 4.1 United States VS China: HBM for AI Accelerators Production Value Comparison
 - 4.1.1 United States VS China: HBM for AI Accelerators Production Value Comparison (2021 & 2025 & 2032)
 - 4.1.2 United States VS China: HBM for AI Accelerators Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: HBM for AI Accelerators Production Comparison
 - 4.2.1 United States VS China: HBM for AI Accelerators Production Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: HBM for AI Accelerators Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: HBM for AI Accelerators Consumption Comparison
 - 4.3.1 United States VS China: HBM for AI Accelerators Consumption Comparison (2021 & 2025 & 2032)
 - 4.3.2 United States VS China: HBM for AI Accelerators Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based HBM for AI Accelerators Manufacturers and Market Share, 2021-2026
 - 4.4.1 United States Based HBM for AI Accelerators Manufacturers, Headquarters and Production Site (States, Country)
 - 4.4.2 United States Based Manufacturers HBM for AI Accelerators Production Value (2021-2026)

4.4.3 United States Based Manufacturers HBM for AI Accelerators Production (2021-2026)

4.5 China Based HBM for AI Accelerators Manufacturers and Market Share

4.5.1 China Based HBM for AI Accelerators Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers HBM for AI Accelerators Production Value (2021-2026)

4.5.3 China Based Manufacturers HBM for AI Accelerators Production (2021-2026)

4.6 Rest of World Based HBM for AI Accelerators Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based HBM for AI Accelerators Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers HBM for AI Accelerators Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers HBM for AI Accelerators Production (2021-2026)

5 MARKET ANALYSIS BY MEMORY GENERATION

5.1 World HBM for AI Accelerators Market Size Overview by Memory Generation: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Memory Generation

5.2.1 HBM3

5.2.2 HBM3E

5.2.3 HBM4

5.3 Market Segment by Memory Generation

5.3.1 World HBM for AI Accelerators Production by Memory Generation (2021-2032)

5.3.2 World HBM for AI Accelerators Production Value by Memory Generation (2021-2032)

5.3.3 World HBM for AI Accelerators Average Price by Memory Generation (2021-2032)

6 MARKET ANALYSIS BY STACK HEIGHT

6.1 World HBM for AI Accelerators Market Size Overview by Stack Height: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Stack Height

6.2.1 8-High

6.2.2 12-High

6.2.3 16-High

6.2.4 Other

6.3 Market Segment by Stack Height

6.3.1 World HBM for AI Accelerators Production by Stack Height (2021-2032)

6.3.2 World HBM for AI Accelerators Production Value by Stack Height (2021-2032)

6.3.3 World HBM for AI Accelerators Average Price by Stack Height (2021-2032)

7 MARKET ANALYSIS BY PEAK BANDWIDTH PER STACK CLASS

7.1 World HBM for AI Accelerators Market Size Overview by Peak Bandwidth Per Stack Class: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Peak Bandwidth Per Stack Class

7.2.1 Up To 819 GB/s

7.2.2 820 GB/s To 1.2 TB/s

7.2.3 Above 1.2 TB/s

7.3 Market Segment by Peak Bandwidth Per Stack Class

7.3.1 World HBM for AI Accelerators Production by Peak Bandwidth Per Stack Class (2021-2032)

7.3.2 World HBM for AI Accelerators Production Value by Peak Bandwidth Per Stack Class (2021-2032)

7.3.3 World HBM for AI Accelerators Average Price by Peak Bandwidth Per Stack Class (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World HBM for AI Accelerators Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Foundation Model Training

8.2.2 Online AI Inference

8.2.3 General-Purpose AI Compute

8.2.4 AI and HPC Converged Compute

8.3 Market Segment by Application

8.3.1 World HBM for AI Accelerators Production by Application (2021-2032)

8.3.2 World HBM for AI Accelerators Production Value by Application (2021-2032)

8.3.3 World HBM for AI Accelerators Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Samsung Electronics Co., Ltd.

9.1.1 Samsung Electronics Co., Ltd. Details

9.1.2 Samsung Electronics Co., Ltd. Major Business

9.1.3 Samsung Electronics Co., Ltd. HBM for AI Accelerators Product and Services

9.1.4 Samsung Electronics Co., Ltd. HBM for AI Accelerators Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 Samsung Electronics Co., Ltd. Recent Developments/Updates

9.1.6 Samsung Electronics Co., Ltd. Competitive Strengths & Weaknesses

9.2 SK hynix Inc.

9.2.1 SK hynix Inc. Details

9.2.2 SK hynix Inc. Major Business

9.2.3 SK hynix Inc. HBM for AI Accelerators Product and Services

9.2.4 SK hynix Inc. HBM for AI Accelerators Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.2.5 SK hynix Inc. Recent Developments/Updates

9.2.6 SK hynix Inc. Competitive Strengths & Weaknesses

9.3 Micron Technology, Inc.

9.3.1 Micron Technology, Inc. Details

9.3.2 Micron Technology, Inc. Major Business

9.3.3 Micron Technology, Inc. HBM for AI Accelerators Product and Services

9.3.4 Micron Technology, Inc. HBM for AI Accelerators Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.3.5 Micron Technology, Inc. Recent Developments/Updates

9.3.6 Micron Technology, Inc. Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 HBM for AI Accelerators Industry Chain

10.2 HBM for AI Accelerators Upstream Analysis

10.2.1 HBM for AI Accelerators Core Raw Materials

10.2.2 Main Manufacturers of HBM for AI Accelerators Core Raw Materials

10.3 Midstream Analysis

10.4 Downstream Analysis

10.5 HBM for AI Accelerators Production Mode

10.6 HBM for AI Accelerators Procurement Model

10.7 HBM for AI Accelerators Industry Sales Model and Sales Channels

10.7.1 HBM for AI Accelerators Sales Model

10.7.2 HBM for AI Accelerators Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

- Table 1. World HBM for AI Accelerators Production Value by Region (2021, 2025 and 2032) & (USD Million)
- Table 2. World HBM for AI Accelerators Production Value by Region (2021-2026) & (USD Million)
- Table 3. World HBM for AI Accelerators Production Value by Region (2027-2032) & (USD Million)
- Table 4. World HBM for AI Accelerators Production Value Market Share by Region (2021-2026)
- Table 5. World HBM for AI Accelerators Production Value Market Share by Region (2027-2032)
- Table 6. World HBM for AI Accelerators Production by Region (2021-2026) & (Million Units)
- Table 7. World HBM for AI Accelerators Production by Region (2027-2032) & (Million Units)
- Table 8. World HBM for AI Accelerators Production Market Share by Region (2021-2026)
- Table 9. World HBM for AI Accelerators Production Market Share by Region (2027-2032)
- Table 10. World HBM for AI Accelerators Average Price by Region (2021-2026) & (US\$/Unit)
- Table 11. World HBM for AI Accelerators Average Price by Region (2027-2032) & (US\$/Unit)
- Table 12. HBM for AI Accelerators Major Market Trends
- Table 13. World HBM for AI Accelerators Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Million Units)
- Table 14. World HBM for AI Accelerators Consumption by Region (2021-2026) & (Million Units)
- Table 15. World HBM for AI Accelerators Consumption Forecast by Region (2027-2032) & (Million Units)
- Table 16. World HBM for AI Accelerators Production Value by Manufacturer (2021-2026) & (USD Million)
- Table 17. Production Value Market Share of Key HBM for AI Accelerators Producers in 2025
- Table 18. World HBM for AI Accelerators Production by Manufacturer (2021-2026) & (Million Units)

- Table 19. Production Market Share of Key HBM for AI Accelerators Producers in 2025
- Table 20. World HBM for AI Accelerators Average Price by Manufacturer (2021-2026) & (US\$/Unit)
- Table 21. Global HBM for AI Accelerators Company Evaluation Quadrant
- Table 22. World HBM for AI Accelerators Industry Rank of Major Manufacturers, Based on Production Value in 2025
- Table 23. Head Office and HBM for AI Accelerators Production Site of Key Manufacturer
- Table 24. HBM for AI Accelerators Market: Company Product Type Footprint
- Table 25. HBM for AI Accelerators Market: Company Product Application Footprint
- Table 26. HBM for AI Accelerators Competitive Factors
- Table 27. HBM for AI Accelerators New Entrant and Capacity Expansion Plans
- Table 28. HBM for AI Accelerators Mergers & Acquisitions Activity
- Table 29. United States VS China HBM for AI Accelerators Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)
- Table 30. United States VS China HBM for AI Accelerators Production Comparison, (2021 & 2025 & 2032) & (Million Units)
- Table 31. United States VS China HBM for AI Accelerators Consumption Comparison, (2021 & 2025 & 2032) & (Million Units)
- Table 32. United States Based HBM for AI Accelerators Manufacturers, Headquarters and Production Site (States, Country)
- Table 33. United States Based Manufacturers HBM for AI Accelerators Production Value, (2021-2026) & (USD Million)
- Table 34. United States Based Manufacturers HBM for AI Accelerators Production Value Market Share (2021-2026)
- Table 35. United States Based Manufacturers HBM for AI Accelerators Production (2021-2026) & (Million Units)
- Table 36. United States Based Manufacturers HBM for AI Accelerators Production Market Share (2021-2026)
- Table 37. China Based HBM for AI Accelerators Manufacturers, Headquarters and Production Site (Province, Country)
- Table 38. China Based Manufacturers HBM for AI Accelerators Production Value, (2021-2026) & (USD Million)
- Table 39. China Based Manufacturers HBM for AI Accelerators Production Value Market Share (2021-2026)
- Table 40. China Based Manufacturers HBM for AI Accelerators Production, (2021-2026) & (Million Units)
- Table 41. China Based Manufacturers HBM for AI Accelerators Production Market Share (2021-2026)

Table 42. Rest of World Based HBM for AI Accelerators Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers HBM for AI Accelerators Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers HBM for AI Accelerators Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers HBM for AI Accelerators Production, (2021-2026) & (Million Units)

Table 46. Rest of World Based Manufacturers HBM for AI Accelerators Production Market Share (2021-2026)

Table 47. World HBM for AI Accelerators Production Value by Memory Generation, (USD Million), 2021 & 2025 & 2032

Table 48. World HBM for AI Accelerators Production by Memory Generation (2021-2026) & (Million Units)

Table 49. World HBM for AI Accelerators Production by Memory Generation (2027-2032) & (Million Units)

Table 50. World HBM for AI Accelerators Production Value by Memory Generation (2021-2026) & (USD Million)

Table 51. World HBM for AI Accelerators Production Value by Memory Generation (2027-2032) & (USD Million)

Table 52. World HBM for AI Accelerators Average Price by Memory Generation (2021-2026) & (US\$/Unit)

Table 53. World HBM for AI Accelerators Average Price by Memory Generation (2027-2032) & (US\$/Unit)

Table 54. World HBM for AI Accelerators Production Value by Stack Height, (USD Million), 2021 & 2025 & 2032

Table 55. World HBM for AI Accelerators Production by Stack Height (2021-2026) & (Million Units)

Table 56. World HBM for AI Accelerators Production by Stack Height (2027-2032) & (Million Units)

Table 57. World HBM for AI Accelerators Production Value by Stack Height (2021-2026) & (USD Million)

Table 58. World HBM for AI Accelerators Production Value by Stack Height (2027-2032) & (USD Million)

Table 59. World HBM for AI Accelerators Average Price by Stack Height (2021-2026) & (US\$/Unit)

Table 60. World HBM for AI Accelerators Average Price by Stack Height (2027-2032) & (US\$/Unit)

Table 61. World HBM for AI Accelerators Production Value by Peak Bandwidth Per

Stack Class, (USD Million), 2021 & 2025 & 2032

Table 62. World HBM for AI Accelerators Production by Peak Bandwidth Per Stack Class (2021-2026) & (Million Units)

Table 63. World HBM for AI Accelerators Production by Peak Bandwidth Per Stack Class (2027-2032) & (Million Units)

Table 64. World HBM for AI Accelerators Production Value by Peak Bandwidth Per Stack Class (2021-2026) & (USD Million)

Table 65. World HBM for AI Accelerators Production Value by Peak Bandwidth Per Stack Class (2027-2032) & (USD Million)

Table 66. World HBM for AI Accelerators Average Price by Peak Bandwidth Per Stack Class (2021-2026) & (US\$/Unit)

Table 67. World HBM for AI Accelerators Average Price by Peak Bandwidth Per Stack Class (2027-2032) & (US\$/Unit)

Table 68. World HBM for AI Accelerators Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World HBM for AI Accelerators Production by Application (2021-2026) & (Million Units)

Table 70. World HBM for AI Accelerators Production by Application (2027-2032) & (Million Units)

Table 71. World HBM for AI Accelerators Production Value by Application (2021-2026) & (USD Million)

Table 72. World HBM for AI Accelerators Production Value by Application (2027-2032) & (USD Million)

Table 73. World HBM for AI Accelerators Average Price by Application (2021-2026) & (US\$/Unit)

Table 74. World HBM for AI Accelerators Average Price by Application (2027-2032) & (US\$/Unit)

Table 75. Samsung Electronics Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 76. Samsung Electronics Co., Ltd. Major Business

Table 77. Samsung Electronics Co., Ltd. HBM for AI Accelerators Product and Services

Table 78. Samsung Electronics Co., Ltd. HBM for AI Accelerators Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Samsung Electronics Co., Ltd. Recent Developments/Updates

Table 80. Samsung Electronics Co., Ltd. Competitive Strengths & Weaknesses

Table 81. SK hynix Inc. Basic Information, Manufacturing Base and Competitors

Table 82. SK hynix Inc. Major Business

Table 83. SK hynix Inc. HBM for AI Accelerators Product and Services

Table 84. SK hynix Inc. HBM for AI Accelerators Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. SK hynix Inc. Recent Developments/Updates

Table 86. SK hynix Inc. Competitive Strengths & Weaknesses

Table 87. Micron Technology, Inc. Basic Information, Manufacturing Base and Competitors

Table 88. Micron Technology, Inc. Major Business

Table 89. Micron Technology, Inc. HBM for AI Accelerators Product and Services

Table 90. Micron Technology, Inc. HBM for AI Accelerators Production (Million Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Micron Technology, Inc. Recent Developments/Updates

Table 92. Micron Technology, Inc. Competitive Strengths & Weaknesses

Table 93. Global Key Players of HBM for AI Accelerators Upstream (Raw Materials)

Table 94. Global HBM for AI Accelerators Typical Customers

Table 95. HBM for AI Accelerators Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. HBM for AI Accelerators Picture

Figure 2. World HBM for AI Accelerators Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World HBM for AI Accelerators Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World HBM for AI Accelerators Production (2021-2032) & (Million Units)

Figure 5. World HBM for AI Accelerators Average Price (2021-2032) & (US\$/Unit)

Figure 6. World HBM for AI Accelerators Production Value Market Share by Region (2021-2032)

Figure 7. World HBM for AI Accelerators Production Market Share by Region (2021-2032)

Figure 8. United States HBM for AI Accelerators Production (2021-2032) & (Million Units)

Figure 9. South Korea HBM for AI Accelerators Production (2021-2032) & (Million Units)

Figure 10. HBM for AI Accelerators Market Drivers

Figure 11. Factors Affecting Demand

Figure 12. World HBM for AI Accelerators Consumption (2021-2032) & (Million Units)

Figure 13. World HBM for AI Accelerators Consumption Market Share by Region (2021-2032)

Figure 14. United States HBM for AI Accelerators Consumption (2021-2032) & (Million Units)

Figure 15. China HBM for AI Accelerators Consumption (2021-2032) & (Million Units)

Figure 16. Europe HBM for AI Accelerators Consumption (2021-2032) & (Million Units)

Figure 17. Japan HBM for AI Accelerators Consumption (2021-2032) & (Million Units)

Figure 18. South Korea HBM for AI Accelerators Consumption (2021-2032) & (Million Units)

Figure 19. ASEAN HBM for AI Accelerators Consumption (2021-2032) & (Million Units)

Figure 20. India HBM for AI Accelerators Consumption (2021-2032) & (Million Units)

Figure 21. Producer Shipments of HBM for AI Accelerators by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 22. Global Four-firm Concentration Ratios (CR4) for HBM for AI Accelerators Markets in 2025

Figure 23. Global Four-firm Concentration Ratios (CR8) for HBM for AI Accelerators Markets in 2025

Figure 24. United States VS China: HBM for AI Accelerators Production Value Market

Share Comparison (2021 & 2025 & 2032)

Figure 25. United States VS China: HBM for AI Accelerators Production Market Share Comparison (2021 & 2025 & 2032)

Figure 26. United States VS China: HBM for AI Accelerators Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States Based Manufacturers HBM for AI Accelerators Production Market Share 2025

Figure 28. China Based Manufacturers HBM for AI Accelerators Production Market Share 2025

Figure 29. Rest of World Based Manufacturers HBM for AI Accelerators Production Market Share 2025

Figure 30. World HBM for AI Accelerators Production Value by Memory Generation, (USD Million), 2021 & 2025 & 2032

Figure 31. World HBM for AI Accelerators Production Value Market Share by Memory Generation in 2025

Figure 32. HBM3

Figure 33. HBM3E

Figure 34. HBM4

Figure 35. World HBM for AI Accelerators Production Market Share by Memory Generation (2021-2032)

Figure 36. World HBM for AI Accelerators Production Value Market Share by Memory Generation (2021-2032)

Figure 37. World HBM for AI Accelerators Average Price by Memory Generation (2021-2032) & (US\$/Unit)

Figure 38. World HBM for AI Accelerators Production Value by Stack Height, (USD Million), 2021 & 2025 & 2032

Figure 39. World HBM for AI Accelerators Production Value Market Share by Stack Height in 2025

Figure 40. 8-High

Figure 41. 12-High

Figure 42. 16-High

Figure 43. Other

Figure 44. World HBM for AI Accelerators Production Market Share by Stack Height (2021-2032)

Figure 45. World HBM for AI Accelerators Production Value Market Share by Stack Height (2021-2032)

Figure 46. World HBM for AI Accelerators Average Price by Stack Height (2021-2032) & (US\$/Unit)

Figure 47. World HBM for AI Accelerators Production Value by Peak Bandwidth Per

Stack Class, (USD Million), 2021 & 2025 & 2032

Figure 48. World HBM for AI Accelerators Production Value Market Share by Peak Bandwidth Per Stack Class in 2025

Figure 49. Up To 819 GB/s

Figure 50. 820 GB/s To 1.2 TB/s

Figure 51. Above 1.2 TB/s

Figure 52. World HBM for AI Accelerators Production Market Share by Peak Bandwidth Per Stack Class (2021-2032)

Figure 53. World HBM for AI Accelerators Production Value Market Share by Peak Bandwidth Per Stack Class (2021-2032)

Figure 54. World HBM for AI Accelerators Average Price by Peak Bandwidth Per Stack Class (2021-2032) & (US\$/Unit)

Figure 55. World HBM for AI Accelerators Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 56. World HBM for AI Accelerators Production Value Market Share by Application in 2025

Figure 57. Foundation Model Training

Figure 58. Online AI Inference

Figure 59. General-Purpose AI Compute

Figure 60. AI and HPC Converged Compute

Figure 61. World HBM for AI Accelerators Production Market Share by Application (2021-2032)

Figure 62. World HBM for AI Accelerators Production Value Market Share by Application (2021-2032)

Figure 63. World HBM for AI Accelerators Average Price by Application (2021-2032) & (US\$/Unit)

Figure 64. HBM for AI Accelerators Industry Chain

Figure 65. HBM for AI Accelerators Procurement Model

Figure 66. HBM for AI Accelerators Sales Model

Figure 67. HBM for AI Accelerators Sales Channels, Direct Sales, and Distribution

Figure 68. Methodology

Figure 69. Research Process and Data Source

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