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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

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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

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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

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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

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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:

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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?

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