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Global HBM for AI Accelerators Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global HBM for AI Accelerators market size was valued at US$ 34425 million in 2025 and is forecast to a readjusted size of US$ 215726 million by 2032 with a CAGR of 27.9% during review period.

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

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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-

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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 is a detailed and comprehensive analysis for global HBM for AI Accelerators market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Memory Generation and by Application. As the market is constantly changing, this report 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 HBM for AI Accelerators market size and forecasts, in consumption value ($ Million), sales quantity (Million Units), and average selling prices (US$/Unit), 2021-2032

Global HBM for AI Accelerators market size and forecasts by region and country, in consumption value ($ Million), sales quantity (Million Units), and average selling prices (US$/Unit), 2021-2032

Global HBM for AI Accelerators market size and forecasts, by Memory Generation and by Application, in consumption value ($ Million), sales quantity (Million Units), and average selling prices (US$/Unit), 2021-2032

Global HBM for AI Accelerators market shares of main players, shipments in revenue ($ Million), sales quantity (Million Units), and ASP (US$/Unit), 2021-2026

The Primary Objectives in This Report Are:

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

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To assess the growth potential for HBM for AI Accelerators

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 HBM for AI Accelerators market based on the following parameters - company overview, sales quantity, revenue, 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.

Market Segmentation

HBM for AI Accelerators market is split by Memory Generation and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Memory Generation, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Memory Generation

HBM3

HBM3E

HBM4

Market segment by Stack Height

8-High

12-High

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16-High

Other

Market segment by Peak Bandwidth Per Stack Class

Up To 819 GB/s

820 GB/s To 1.2 TB/s

Above 1.2 TB/s

Market segment by Application

Foundation Model Training

Online AI Inference

General-Purpose AI Compute

AI and HPC Converged Compute

Major players covered

Samsung Electronics Co., Ltd.

SK hynix Inc.

Micron Technology, Inc.

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

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Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe HBM for AI Accelerators product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of HBM for AI Accelerators, with price, sales quantity, revenue, and global market share of HBM for AI Accelerators from 2021 to 2026.

Chapter 3, the HBM for AI Accelerators competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the HBM for AI Accelerators breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Memory Generation and by Application, with sales market share and growth rate by Memory Generation, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026.and HBM for AI Accelerators market forecast, by regions, by Memory Generation, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

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Chapter 13, the key raw materials and key suppliers, and industry chain of HBM for AI Accelerators.

Chapter 14 and 15, to describe HBM for AI Accelerators sales channel, distributors, customers, research findings and conclusion.

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