

# Global HBM2 DRAM Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global HBM2 DRAM market size is expected to reach \$ 44.23 million by 2032, rising at a market growth of -16.2% CAGR during the forecast period (2026-2032).

HBM2 memory is the second generation of high bandwidth stacked DRAM designed for artificial intelligence training, high performance computing, graphics processing, and other high throughput data systems. Its core purpose is to provide far more bandwidth between processors and memory than conventional DDR and GDDR approaches while reducing system bottlenecks through a smaller footprint and better energy efficiency. Based on the official materials from Samsung, SK hynix, and Micron, these products generally use through silicon vias to vertically stack multiple DRAM layers and are tightly integrated in the same package with GPUs, CPUs, TPUs, or other ASICs, thereby shortening signal paths, increasing parallel data throughput, and improving power and thermal behavior. As HBM2 evolved into HBM2E, per stack capacity, per pin speed, and bandwidth all increased, with representative products spanning 8GB and 16GB capacities and performance levels such as 307 GB/s, 410 GB/s, and 460 GB/s per stack. The main customers are GPU vendors, AI accelerator suppliers, server and supercomputing system makers, and advanced packaging partners that need high bandwidth memory subsystems. The usual delivery format is not a standard memory module but rather known good stacked die or highly integrated stacked devices supplied by the memory manufacturer and then combined with the host chip in a system package by OSATs or system companies. As a result, the business model is closer to high end customized component supply and long cycle design in. In industry terms, HBM2 and HBM2E are fundamentally critical memory layers within AI infrastructure and advanced computing platforms, serving large model training, scientific computing, complex graphics rendering, network switching, and selected high end automotive electronics scenarios that must move massive amounts of data within a constrained

area.

From a product and technology perspective, HBM2 and HBM2E are not simply upgraded general purpose DRAM. They are specialized high bandwidth solutions designed to restructure the relationship between memory and processors for highly parallel computing workloads. Samsung describes HBM as using TSV stacking, a wide interface, and high throughput architecture to serve AI training and high performance computing. SK hynix presents HBM2E as a system level solution defined by high speed, wide I/O, and improved thermal efficiency. Micron further states that HBM2E is intended for applications demanding maximum throughput between memory and processing and can serve as an alternative to selected GDDR6 and GDDR6X use cases. This indicates that the HBM2 family is not tied to any single graphics generation but to the broader system bottlenecks created by AI training, scientific computing, graphics rendering, and high throughput data processing. Samsung HBM2 Aquabolt reached 8GB, 2.4Gbps per pin, and 307 GB/s, Samsung HBM2E Flashbolt raised per stack capacity to 16GB and bandwidth to 410 GB/s, SK hynix HBM2E reached 3.6Gbps and 460 GB/s, and Micron documentation lists 8GB and 16GB devices with 1,024 bit I/O and up to 410 GB/s. As model sizes expand, compute cluster density rises, and accelerator platforms demand more memory bandwidth, the gains in capacity, bandwidth, efficiency, and packaging synergy from HBM2 to HBM2E have become a major performance lever for modern computing platforms.

From an industry organization perspective, the competitive logic of HBM2 and HBM2E is clearly different from that of standard memory products. Micron's technical materials show that HBM2E is typically shipped as known good stacked die and must be integrated by OSATs or system companies with CPUs, GPUs, TPUs, and other host chips at the system package level. A typical system may contain four to six HBM2E devices. This means competition no longer depends only on wafer manufacturing and bit cost, but increasingly on TSV process capability, stacking yield, thermal management, interconnect design, and coordination with advanced packaging partners. Samsung repeatedly emphasizes optimization in TSV design, thermal control, stack structure, and stable data transmission across its HBM2 and HBM2E materials, while SK hynix presents bandwidth, thermal improvement, and its next generation HBM roadmap together, showing that leading companies have shifted from single device competition to joint optimization across device, packaging, and system layers. Because HBM products must be co developed with accelerator chips, silicon interposers, package substrates, and system design, customer qualification cycles are longer, validation thresholds are higher, and supplier relationships become more long term. Combined with U.S. CHIPS support for Micron's DRAM manufacturing and SK hynix's

Indiana advanced packaging and R and D plan, future HBM expansion will not be just about more output, but also about localized manufacturing, advanced packaging, and AI supply chain restructuring, keeping entry barriers high.

From a regional and commercial perspective, the HBM2 family has relatively few manufacturers but very strong global reach, showing a pattern of highly concentrated upstream supply and broadly distributed downstream demand. At present, the original manufacturers that can be clearly verified through official product pages are concentrated in Korea and the United States. Korea has Samsung Electronics and SK hynix as two core suppliers, while the United States has Micron as its representative producer, resulting in a highly concentrated supply side. At the same time, Samsung Semiconductor has already built a global network covering China, Southeast Asia, Europe, the Middle East, Africa, and the Americas. Micron has operations and support footprints across the Americas and Asia Pacific, and SK hynix maintains overseas network nodes including the United States beyond its Korean headquarters. This indicates that HBM2 and HBM2E consumption is not confined to a single region but spreads globally alongside AI servers, supercomputing centers, graphics systems, networking equipment, and other high end electronic systems. For industry prospects, this combination of concentrated supply and outward spreading demand usually means rising pricing power and strategic importance for high end memory, while also making it easier for leading suppliers to lock in key customers through global sales networks and local support structures. Even as HBM2 is succeeded by newer generations, it should retain clear value in installed platforms, cost sensitive high bandwidth scenarios, and technology migration across the supply chain, and continue to generate stable high value revenue opportunities for leading vendors.

This report studies the global HBM2 DRAM production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for HBM2 DRAM 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 HBM2 DRAM that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global HBM2 DRAM total production and demand, 2021-2032, (Million Units)

Global HBM2 DRAM total production value, 2021-2032, (USD Million)

Global HBM2 DRAM production by region & country, production, value, CAGR,

2021-2032, (USD Million) & (Million Units), (based on production site)

Global HBM2 DRAM consumption by region & country, CAGR, 2021-2032 & (Million Units)

U.S. VS China: HBM2 DRAM domestic production, consumption, key domestic manufacturers and share

Global HBM2 DRAM production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Million Units)

Global HBM2 DRAM production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

Global HBM2 DRAM production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

This report profiles key players in the global HBM2 DRAM 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 SK Hynix, Samsung, Micron, 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 HBM2 DRAM 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 Type, 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 HBM2 DRAM Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

#### Global HBM2 DRAM Market, Segmentation by Type:

4 G

8 G

16 G

Others

#### Global HBM2 DRAM Market, Segmentation by Generation Type:

HBM2

HBM2E

#### Global HBM2 DRAM Market, Segmentation by Per-Stack Bandwidth Tier:

307GB/s Tier

410GB/s Tier

460GB/s Tier

#### Global HBM2 DRAM Market, Segmentation by Application:

Data Center AI Acceleration Systems

Professional Computing Systems

Industry Embedded Systems

#### Companies Profiled:

SK Hynix

Samsung

Micron

#### Key Questions Answered:

1. How big is the global HBM2 DRAM market?
2. What is the demand of the global HBM2 DRAM market?
3. What is the year over year growth of the global HBM2 DRAM market?
4. What is the production and production value of the global HBM2 DRAM market?
5. Who are the key producers in the global HBM2 DRAM market?
6. What are the growth factors driving the market demand?

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