

Global Server AI Chip Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Server AI Chip market size is expected to reach \$ 233722 million by 2032, rising at a market growth of 20.0% CAGR during the forecast period (2026-2032).

In 2025, global AI Chips capacity 10,000 k Pcs, sales reached approximately 9,500 k Pcs, with an average market price of around 6,000 USD/Pcs, industrial gross margin 53%.

Server AI Chips have evolved from discrete accelerators into the control point for datacenter performance, deployment speed and AI service economics. These processors are deployed in accelerator modules, AI servers, compute trays and rack-scale systems to support foundation-model pre-training, post-training, fine-tuning, inference, recommendation, multimodal processing and scientific computing. The principal product architectures include general-purpose GPUs, purpose-built AI accelerators, hyperscaler-designed ASICs and server CPUs with integrated matrix-compute capabilities. In a typical system, host CPUs orchestrate data movement and workload scheduling, Server AI Chips execute tensor and attention operations, HBM stores model weights and intermediate states, and high-speed fabrics synchronize distributed workloads. Competitive differentiation has therefore expanded from processor performance to the full stack of silicon, memory, networking, systems engineering, compilers, runtime libraries and cluster operations.

The commercial specification of a Server AI Chip is increasingly defined by the combined efficiency of compute, memory, interconnect and power. Leading accelerators generally use 5nm- to 3nm-class processes, with transistor counts exceeding 100 billion in several products. High-end HBM capacity currently spans roughly 96GB to 288GB per accelerator, while memory bandwidth ranges from approximately 2.5TB/s to 8TB/s.

AMD's MI355X combines 288GB of HBM3E, 8TB/s of bandwidth and a 1,400W typical board power envelope. Google's TPU v5p provides 95GiB of HBM and approximately 2.77TB/s of bandwidth, while TPU7x increases these specifications to 192GiB and about 7.38TB/s. Microsoft Maia 200 integrates 216GB of HBM3E operating at 7TB/s and 272MB of on-chip SRAM. Training continues to rely on BF16 and FP16, while FP8 and FP4-class formats are becoming central to inference throughput and cost reduction.

Technology leadership in Server AI Chips now depends on control of a broader systems value chain. Critical upstream inputs include leading-edge wafers, HBM, silicon interposers, advanced packaging, substrates, power components and high-speed optical or electrical connectivity. Midstream participants convert these components into accelerator modules, switches, network adapters, servers, liquid-cooled racks and orchestration software. NVIDIA combines GPUs, NVLink, NVSwitch, networking and CUDA; AMD develops Instinct accelerators alongside Infinity Fabric and ROCm; Intel Gaudi 3 combines 128GB of HBM with 24 integrated 200Gbps Ethernet ports; Google, AWS and Microsoft deploy TPU, Trainium/Inferentia and Maia platforms for internally optimized workloads. The Chinese ecosystem includes Huawei Ascend, Cambricon, Hygon and several emerging accelerator suppliers, with commercialization centered on domestic server integration, cluster deployment, framework compatibility and migration of industry workloads.

Rack-scale engineering has become part of the Server AI Chip product rather than a downstream integration exercise. NVIDIA's GB200 NVL72 combines 36 Grace CPUs and 72 Blackwell GPUs in a liquid-cooled rack, creating a 72-GPU NVLink domain with approximately 130TB/s of aggregate GPU communication bandwidth. GB300 NVL72 adds greater HBM3E capacity and targets long-context reasoning and test-time compute. AMD's acquisition of ZT Systems illustrates the same strategic direction: the transaction was originally valued at approximately USD4.9 billion, and AMD retained the datacenter systems design organization while subsequently divesting the manufacturing operation to Sanmina for consideration of up to approximately USD3 billion. The structure strengthened AMD's capability in rack design, customer qualification and hyperscale deployment without retaining a manufacturing-heavy business model.

The next phase of Server AI Chip development will be led by inference economics, scale-up fabrics, custom silicon and power-constrained system design. Reasoning models and agentic workloads increase token generation, context length, parallel sampling and tool-use requirements, shifting customer attention toward tokens per watt, time to first token, inter-token latency, throughput per rack and cost per million tokens.

FP4/FP8 processing, sparsity, KV-cache optimization and larger HBM pools will improve inference utilization. Scale-up domains will expand beyond conventional eight-accelerator servers, while liquid cooling, high-voltage rack power and 800Gbps-class networking become standard platform components. Hyperscaler ASICs will absorb predictable internal workloads, while programmable GPUs will remain central to rapidly changing models and broad developer ecosystems. Vera Rubin, Maia 200, TPU7x and new Trainium generations demonstrate that future competition will be measured across architecture efficiency, software maturity, cluster availability and supply-chain execution rather than peak compute alone.

This report studies the global Server AI Chip production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Server AI Chip total production and demand, 2021-2032, (K Pcs)

Global Server AI Chip total production value, 2021-2032, (USD Million)

Global Server AI Chip production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Pcs), (based on production site)

Global Server AI Chip consumption by region & country, CAGR, 2021-2032 & (K Pcs)

U.S. VS China: Server AI Chip domestic production, consumption, key domestic manufacturers and share

Global Server AI Chip production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Pcs)

Global Server AI Chip production by Process Node, production, value, CAGR, 2021-2032, (USD Million) & (K Pcs)

Global Server AI Chip production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Pcs)

This report profiles key players in the global Server AI Chip 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 NVIDIA, AMD, Intel, Google, Microsoft, Amazon,

Samsung, Qualcomm, IBM, Apple, 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 Server AI Chip market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Pcs) and average price (US\$/Pcs) by manufacturer, by Process Node, 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 Server AI Chip Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Server AI Chip Market, Segmentation by Process Node:

7 nm

12 nm

14 nm

Others

Global Server AI Chip Market, Segmentation by Technical Architecture:

GPU

FPGA

ASIC

Others

Global Server AI Chip Market, Segmentation by Function:

Training Chip

Inference Chip

Global Server AI Chip Market, Segmentation by Application:

Cloud and Internet

Financial and Enterprise Service

Manufacturing and Automotive

Healthcare and Research

Others

Companies Profiled:

NVIDIA

AMD

Intel

Google

Microsoft

Amazon

Samsung

Qualcomm

IBM

Apple

Meta

Cerebras Systems

Groq

Graphcore

Tenstorrent

Hailo

SambaNova

Huawei

Cambricon

Horizon Robotics

Biren

Iluvatar CoreX

Moore Threads

MetaX

Enflame

Hygon Information Technology

Changsha Jingjia Microelectronics

Kunlunxin (Baidu)

T-Head (Alibaba)

Hexaflake

Key Questions Answered:

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

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