

Global AI Computing Hardware: AI Accelerators and AI Server Systems Market Growth 2026-2032

<https://marketpublishers.com/r/G7F6FBB20E6EEN.html>

Date: July 2026

Pages: 144

Price: US\$ 3,660.00 (Single User License)

ID: G7F6FBB20E6EEN

Abstracts

The global AI Computing Hardware: AI Accelerators and AI Server Systems market size is predicted to grow from US\$ 279780 million in 2025 to US\$ 967914 million in 2032; it is expected to grow at a CAGR of 16.4% from 2026 to 2032.

AI computing hardware refers to specialized or heterogeneous computing devices designed to run artificial intelligence training, fine-tuning, inference, and edge AI workloads. The category primarily includes data center AI accelerators, GPUs, ASICs, TPUs, NPUs, RDUs, LPUs, accelerator cards, AI modules, GPU servers, AI servers, rack-scale AI computing systems, and embedded AI processors used in intelligent vehicles, robotics, industrial vision, smart devices, and AIoT applications. This study focuses on hardware that directly enables tensor operations, matrix multiplication, low-precision floating-point or integer computation, model parallelism, high-bandwidth memory access, high-speed accelerator interconnects, and large-scale AI cluster deployment. The research objects include AI chip designers, accelerator card and module suppliers, AI server OEMs/ODMs, rack-scale system providers, and major cloud platforms with in-house custom AI silicon.

Based on our research, AI computing hardware has evolved from a standalone ?AI chip? market into a full-stack hardware competition across chips, accelerator cards, servers, racks, clusters, and software ecosystems. Training workloads remain heavily dependent on high-end GPUs and tightly coupled GPU interconnect systems, while inference workloads are becoming more diversified across GPUs, ASICs, TPUs, NPUs, RDUs, LPUs, and edge AI SoCs. For industry sizing, it is essential to separate the broad vendor universe from the revenue model. The broad universe includes chip designers, accelerator card suppliers, server OEMs/ODMs, edge AI chipmakers, and cloud providers with captive silicon. However, the revenue model must avoid double

counting between accelerator vendor revenue and AI server system revenue. This study therefore uses a moderately narrow system-level hardware shipment value, excluding cloud service revenue, HBM, networking switches, cooling infrastructure, power systems, and AI software subscriptions from the core market.

From a supply-side perspective, North America continues to hold the strongest global capabilities in high-end AI accelerators and cloud providers' in-house AI silicon, while Taiwan serves as the core global hub for AI server ODM/OEM manufacturing and rack-scale system production. Taiwanese suppliers play a critical role in manufacturing, system integration, and scale-up delivery across the NVIDIA, AMD, and hyperscale cloud supply chains. China is building a more independent supply system around Ascend, domestic GPUs, AI servers, and automotive AI chips, although advanced process nodes, HBM, advanced packaging, and software ecosystem maturity remain structural constraints.

Demand growth in 2025 and 2026 is primarily driven by frontier model training, large-scale inference clusters, cloud capital expenditure, sovereign AI projects, enterprise private AI deployments, and high-compute intelligent driving platforms. Training demand is highly concentrated among hyperscalers, AI labs, and GPU cloud providers, whereas inference demand is gradually spreading across enterprises, governments, telecom operators, industrial users, and endpoint device makers. Edge AI chips, automotive AI SoCs, and physical AI hardware generally have lower average selling prices than data center GPUs, but their shipment scale, application diversity, and real-time local processing requirements make them a strategically important long-term growth segment.

From a technology standpoint, competition is shifting from peak chip-level FLOPS to system-level throughput, memory capacity, memory bandwidth, accelerator interconnect efficiency, power density, liquid cooling readiness, software stack maturity, and supply availability. The latest product directions from NVIDIA Blackwell, AMD MI350, Huawei Atlas SuperPoD, Qualcomm AI200/AI250, Google TPU, AWS Trainium, and Meta MTIA all indicate that the next phase of competition will be defined by rack-scale architecture, inference cost, energy efficiency, and ecosystem switching cost. The main substitution risks are custom cloud ASICs replacing part of general-purpose GPU demand, inference-specific processors diverting workloads from training-oriented GPUs, and edge AI hardware localizing selected workloads that previously depended on cloud inference.

LP Information, Inc. (LPI) ' newest research report, the ?AI Computing Hardware: AI

Accelerators and AI Server Systems Industry Forecast? looks at past sales and reviews total world AI Computing Hardware: AI Accelerators and AI Server Systems sales in 2025, providing a comprehensive analysis by region and market sector of projected AI Computing Hardware: AI Accelerators and AI Server Systems sales for 2026 through 2032. With AI Computing Hardware: AI Accelerators and AI Server Systems sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world AI Computing Hardware: AI Accelerators and AI Server Systems industry.

This Insight Report provides a comprehensive analysis of the global AI Computing Hardware: AI Accelerators and AI Server Systems landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on AI Computing Hardware: AI Accelerators and AI Server Systems portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global AI Computing Hardware: AI Accelerators and AI Server Systems market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for AI Computing Hardware: AI Accelerators and AI Server Systems and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global AI Computing Hardware: AI Accelerators and AI Server Systems.

This report presents a comprehensive overview, market shares, and growth opportunities of AI Computing Hardware: AI Accelerators and AI Server Systems market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

CPU+GPU

CPU+FPGA

CPU+ASIC

Other

Segmentation by Compute Architecture:

GPU / GPGPU

ASIC / XPU

TPU-like Matrix Accelerator

NPU

RDU / LPU / Dataflow Processor

Neuromorphic Processor

Other

Segmentation by Application:

Internet

Telecommunications

Healthcare

Government

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Inspur

Dell

HPE

Huawei

Lenovo

IBM

Fujitsu

Cisco

Nvidia

H3C

Enginotech

Nettrix

Kunqian

PowerLeader

GIGABYTE

Digital China

ADLINK

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Key Questions Addressed in this Report

What is the 10-year outlook for the global AI Computing Hardware: AI Accelerators and AI Server Systems market?

What factors are driving AI Computing Hardware: AI Accelerators and AI Server Systems market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do AI Computing Hardware: AI Accelerators and AI Server Systems market opportunities vary by end market size?

How does AI Computing Hardware: AI Accelerators and AI Server Systems break out by Type, by Application?

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