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Global Artificial Intelligence PCB Market Growth 2026-2032

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Abstracts

The global Artificial Intelligence PCB market size is predicted to grow from US$ 389 million in 2025 to US$ 1350 million in 2032; it is expected to grow at a CAGR of 19.8% from 2026 to 2032.

Artificial Intelligence PCB are high-performance printed circuit boards designed specifically for AI computing devices. Through specialized structures and optimized materials, they meet the stringent requirements of AI hardware (such as GPUs, TPUs, and AI accelerator chips) for high-speed data transmission, high-density integration, and energy-efficient management. By 2024, global AI PCB production is projected to reach 100,000 square meters, with an average selling price of US$3,000 per square meter. The industry's gross profit margin is approximately 30%-50%, with a production capacity of 400,000 square meters.

The artificial intelligence PCB industry chain forms a highly coordinated closed-loop system with upstream raw materials, midstream substrates and manufacturing, and downstream applications as the core. In terms of upstream raw materials, copper foil is divided into electrolytic copper foil and rolled copper foil. Electrolytic copper foil is the mainstream (accounting for about 40% of the cost), and rolled copper foil is used in high-end scenarios such as high frequency and high speed (the technology is dominated by Japanese companies); the resin is mainly epoxy resin (accounting for more than 70% of the resin used in copper clad laminates). The demand for AI servers drives the application of high-end resins such as PPO, hydrocarbons, and PTFE; glass fiber cloth provides mechanical strength, high-end low dielectric (Low DK) and low thermal expansion (Low The demand for CTE fiberglass cloth has surged, and the technical barriers are high (such as NER-Glass from Japan's Nitto Bosho); copper clad laminate (CCL) is the core substrate of PCB (accounting for 40% of the cost), and is divided into

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rigid (communications, consumer electronics) and flexible (flexible equipment). The high-end market is dominated by Taiwanese and Japanese companies; in terms of midstream substrates and manufacturing, copper clad laminate manufacturing is done by impregnating glass fiber cloth with resin and hot-pressing copper foil. The technology iteration is evolving towards high frequency, high speed and low loss (such as M7 and M8 grade copper clad laminates). In PCB manufacturing, high- and medium-layer boards are AI server GPU substrates that require a design of more than 20 layers. The increase in the number of layers improves signal transmission stability. In terms of high-end packaging, the HDI board uses laser drilling to achieve a micro-blind buried hole structure, which is suitable for AI accelerator modules (such as 4-5 order HDI) and supports high-density wiring. The packaging substrate is the "bridge" connecting the chip and the PCB. It accounts for more than 70% of the cost in high-end packaging and has extremely high technical barriers (such as ABF substrates). In terms of downstream applications, the value of a single PCB for an AI server is 5,000 yuan, and the demand for GPU substrates, accelerator cards, and motherboards has surged. The autonomous driving system of smart cars requires high-end PCBs such as millimeter-wave radars, with a value of more than US$200 per vehicle. The demand for high-frequency and high-speed PCBs for 5G base stations and optical modules of communication equipment continues to grow.

United States market for Artificial Intelligence PCB is estimated to increase from US$ million in 2025 to US$ million by 2032, at a CAGR of % from 2026 through 2032.

China market for Artificial Intelligence PCB is estimated to increase from US$ million in 2025 to US$ million by 2032, at a CAGR of % from 2026 through 2032.

Europe market for Artificial Intelligence PCB is estimated to increase from US$ million in 2025 to US$ million by 2032, at a CAGR of % from 2026 through 2032.

Global key Artificial Intelligence PCB players cover Pengding Holdings, Nippon Mektron, Victory Giant Technology, HoYoGo, TTM Technologies, etc. In terms of revenue, the global two largest companies occupied for a share nearly % in 2025.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Artificial Intelligence PCB Industry Forecast” looks at past sales and reviews total world Artificial Intelligence PCB sales in 2025, providing a comprehensive analysis by region and market sector of projected Artificial Intelligence PCB sales for 2026 through 2032. With Artificial

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Intelligence PCB sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Artificial Intelligence PCB industry.

This Insight Report provides a comprehensive analysis of the global Artificial Intelligence PCB 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 Artificial Intelligence PCB portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Artificial Intelligence PCB market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Artificial Intelligence PCB 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 Artificial Intelligence PCB.

This report presents a comprehensive overview, market shares, and growth opportunities of Artificial Intelligence PCB market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Single-sided PCB

Double-sided PCB

Multilayer PCB

Segmentation by Application:

Consumer Electronics

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Robotics and Automation Systems

Healthcare

Smart Transportation and the Internet of Things

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

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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.

Pengding Holdings

Nippon Mektron

Victory Giant Technology

HoYoGo

TTM Technologies

AT&S

Xinxing Electronics

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Jinding Technology

MEIKO

Dongshan Precision

Shennan Circuits

Guanghe Technology

Shengyi Electronics

Jinwang Electronics

Key Questions Addressed in this Report

What is the 10-year outlook for the global Artificial Intelligence PCB market?

What factors are driving Artificial Intelligence PCB market growth, globally and by region?

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

How do Artificial Intelligence PCB market opportunities vary by end market size?

How does Artificial Intelligence PCB break out by Type, by Application?

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