

Global HBM for AI Accelerators Market Growth 2026-2032

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Abstracts

The global HBM for AI Accelerators market size is predicted to grow from US\$ 32729 million in 2025 to US\$ 431396 million in 2032; it is expected to grow at a CAGR of 44.8% from 2026 to 2032.

AI accelerators use HBM, a high-bandwidth, three-dimensional stacked dynamic random-access memory specifically designed for highly parallel computing platforms. Essentially, within a limited package space, through TSV vertical interconnections, ultra-wide I/O interfaces, multi-layer DRAM chip stacking, and collaborative design with the logic base, it minimizes the bandwidth bottleneck between traditional external memory and computing chips, thereby continuously providing GPUs, AI ASICs, and supercomputing processors with high throughput, low power consumption, and high-density data supply capabilities. Unlike DDR, LPDDR, GDDR, and other general-purpose or board-level memory, HBM is not a standard memory module aimed at broad consumer markets but a key component for high-performance packaging systems, usually directly integrated with accelerator chips into system-level package designs. According to official product information from Samsung and Micron, current HBM products cover generations such as HBM3, HBM3E, and HBM4, with single-stack bandwidth of HBM3E already exceeding 1,180 GB/s, Micron HBM3E exceeding 1.2 TB/s, and Samsung HBM4 further increasing single-stack bandwidth to a maximum of 3,300 GB/s. This product has become a core component that determines system throughput limits and energy efficiency performance in AI infrastructure, rather than just a high-end DRAM branch in the traditional sense.

The main purpose of HBM for AI accelerator is not to simply expand capacity, but to support model parameter call, tensor calculation and high-frequency data exchange with higher bandwidth, stronger parallel access ability and better per watt performance.

HBM for AI accelerator has become the basic performance resource for large-scale model training, generative AI reasoning, AI servers, data centers and supercomputing systems. Its technical path is to rapidly upgrade from hbm3 to hbm3e, and then to hbm4 and subsequent hbm4e. The upgrading focus extends from simple stacking and layer adding to thermal resistance improvement, power consumption optimization, advanced packaging compatibility and customer customization. The current market situation shows two significant characteristics: first, the supply is highly concentrated, and the main original factories in the world are still Samsung, SK Hynix and micron; Second, the demand growth is much faster than the general storage cycle. Micron has signed the price and quantity agreement for its HBM supply for the whole year of 2026, while Samsung expects HBM sales in 2026 to more than triple that in 2025, indicating that HBM has entered a rapid upward phase driven by oligopoly supply, long-term order locking and intergenerational upgrading.

The upstream of HBM is highly dependent on advanced DRAM manufacturing, TSV process, base logic chips, advanced packaging materials, test equipment and thermal management solutions, while the midstream focuses on the design, stacking, verification and mass production capacity of the original storage plant, and the downstream is directly connected to GPU, AI accelerator, cloud computing infrastructure, server machine and supercomputing platform. Therefore, its market fluctuation is not determined by a single memory cycle, but is jointly shaped by the route of computing chips, packaging capacity, data center investment rhythm and policy environment. For the domestic market, the document of the national development and Reform Commission on the in-depth implementation of the 'Eastern digital computing and Western computing' project clearly proposes to coordinate the integrated layout of general computing power, intelligent computing power and super computing power by the end of 2025. The follow-up 'Ai+' action opinions further emphasize the strengthening of Intelligent Computing connectivity and supply-demand matching. Such policies will continue to drive the construction of AI servers and computing infrastructure, and strengthen the indirect demand for HBM supporting capacity from the demand side. For the international market, the United States, on the one hand, supports Samsung and micron to expand their advanced storage manufacturing capabilities through chips incentives, and on the other hand, incorporates HBM into the advanced computing export control framework through bis rules, which means that the global HBM market is affected by two policy forces, namely, 'production expansion incentives' and 'cross-border restrictions'. The former enhances the long-term supply capacity, while the latter changes the regional flow direction, customer structure and market entry threshold.

In the future, the price, output and market size of HBM for AI accelerator will basically

remain high, the output will continue to expand, and the scale will expand rapidly. In terms of price, because HBM is not only constrained by the capacity of the previous wafer, but also restricted by the cycle of advanced packaging, thermal management, test validation and customer introduction of the latter, it does not have the conditions to quickly turn to full competition in the short term. Therefore, the average price of products in the next one to two years is expected to remain high, and the price elasticity of products with newer generations, higher capacity and deeper validation is stronger. However, in the medium term, with the ascent of hbm4 and subsequent products, the improvement of packaging capacity and the expansion of customer structure, the price competition will gradually turn from 'absolute high price' to 'hierarchical pricing'. In terms of output, Samsung has clearly expanded the capacity of hbm4, while micron said that its Singapore HBM advanced packaging facilities will make a substantial contribution to the supply in 2027. SK Hynix also proposed to expand the supply of AI memory through manufacturing optimization and infrastructure construction, so the total output will continue to rise. Meguiar's official forecast is that the market size of HBM will increase from about 35billion US dollars in 2025 to about 100billion US dollars in 2028, corresponding to a compound annual growth rate of about 40%; If calculated according to this official pace, the market size in 2026 will reach about \$49billion. It can be seen that HBM's core feature in the next few years is high structural growth in the context of AI infrastructure expansion

LP Information, Inc. (LPI) ' newest research report, the ?HBM for AI Accelerators Industry Forecast? looks at past sales and reviews total world HBM for AI Accelerators sales in 2025, providing a comprehensive analysis by region and market sector of projected HBM for AI Accelerators sales for 2026 through 2032. With HBM for AI Accelerators sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world HBM for AI Accelerators industry.

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for HBM for AI Accelerators and breaks down the forecast by

Memory Generation, 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 HBM for AI Accelerators.

This report presents a comprehensive overview, market shares, and growth opportunities of HBM for AI Accelerators market by product type, application, key manufacturers and key regions and countries.

Segmentation by Memory Generation:

HBM3

HBM3E

HBM4

Segmentation by Stack Height:

8-High

12-High

Segmentation by Peak Bandwidth Per Stack Class:

Up To 819 GB/s

820 GB/s To 1.2 TB/s

Above 1.2 TB/s

Segmentation by Application:

Foundation Model Training

Online AI Inference

General-Purpose AI Compute

AI and HPC Converged Compute

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.

Samsung Electronics Co., Ltd.

SK hynix Inc.

Micron Technology, Inc.

Key Questions Addressed in this Report

What is the 10-year outlook for the global HBM for AI Accelerators market?

What factors are driving HBM for AI Accelerators market growth, globally and by region?

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

How do HBM for AI Accelerators market opportunities vary by end market size?

How does HBM for AI Accelerators break out by Memory Generation, by Application?

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