

AI Server Urgent Orders Surge



Overview

May 26, 2026 /SemiMedia/ — Global NAND Flash suppliers posted sharp revenue growth in the first quarter of 2026 as AI server demand accelerated Enterprise SSD adoption and continued HDD shortages redirected orders toward high-capacity QLC SSD products, according to. May 26, 2026 /SemiMedia/ — Global NAND Flash suppliers posted sharp revenue growth in the first quarter of 2026 as AI server demand accelerated Enterprise SSD adoption and continued HDD shortages redirected orders toward high-capacity QLC SSD products, according to. The AI Factory Logic Behind Dell and HPE's Surge The following is an AI-generated summary of this article. AI servers have become the primary focus for global institutional capital, evolving from GPU procurement to the construction of AI factories, driving a structural upgrade of the industry. Key. TrendForce's latest memory pricing survey reveals that DRAM suppliers are reallocating capacity toward HBM and server applications in 2Q26, while implementing catch-up pricing to narrow price gaps across product segments. The research firm. Dell Technologies has reported a 39 percent year-over-year increase in revenues, reaching a record \$33. 4 billion for the fiscal fourth quarter of 2026, primarily driven by an extraordinary surge in AI-optimized server sales. The company anticipates sustained growth in the AI data center market into. The rapid expansion of artificial intelligence (AI) server infrastructure and large-scale deployment of custom AI accelerator chips are transforming the global multilayer ceramic capacitor (MLCC) market, with suppliers facing mounting order backlogs and tightening supply, according to TrendForce. 51 trillion on AI-server demand.



Article Content

Why Does Demand for AI Servers Keep Surpassing Expectations?

In Q3 2025, server business revenue hit a record \$4.9 billion, AI system revenue was \$1.6 billion, AI orders nearly doubled quarter-over-quarter, and sovereign AI orders surged by

AI Server Demand to Drive Memory Contract Price Increases in 2Q26

Conventional DRAM contract prices expected to rise 58-63% QoQ in 2Q26; NAND Flash contract prices up 70-75% QoQ. DRAM suppliers keep reallocating capacity toward server-related

AI server demand drives NAND Flash revenue surge as Enterprise

May 26, 2026 /SemiMedia/ — Global NAND Flash suppliers posted sharp revenue growth in the first quarter of 2026 as AI server demand accelerated Enterprise SSD adoption and continued HDD

Dell's \$43B AI Server Backlog Triggers DRAM

Dell Technologies has reported a 39 percent year-over-year increase in revenues, reaching a record \$33.4 billion for the fiscal fourth quarter of 2026,

Server DRAM prices surge up to 50% as AI-induced memory

Server DRAM prices surge up to 50% as AI-induced memory shortage hits hyperscaler supply — U.S. and Chinese customers only getting 70% order fulfillment News By Luke James

AI Server Boom Pushes MLCC Market Toward Supply Shortage as

The expansion of AI server infrastructure and deployment of custom AI accelerator chips are transforming the MLCC market

Foxconn Reports AI Server Revenue Surge | Let's Data Science

Hon Hai, the Foxconn parent that assembles Nvidia AI server systems, reported **June 2026** revenue growth while reports pegged **Q2 sales** at about **NT\$2.51 trillion** on AI-server

Surging AI Infrastructure Orders Push Foxconn to Forecast Record

In the third quarter, Foxconn expects AI server revenue to jump more than 170% from the previous year. The surge is being fueled by hyperscale cloud providers and AI developers racing to

AI Servers Trigger MLCC Cannibalization Wave; Japan and South

A new report from TrendForce indicates that the explosive demand for AI servers is triggering a significant cannibalization effect in the MLCC market. The Book-to-Bill (B/B) ratios for the

Why Has the Surge in AI Inference Demand First Boosted Server

AI inference is rapidly overtaking training as the primary driver of growth in the server market. HPE's Q2 revenue surged by 40%, and orders for traditional servers doubled. This analysis

Rabbit R2 India Price Gap: Urgent Buying Guide 2026 | comGateway

Don't pay double for the Rabbit R2 in India. Learn how to use a US proxy service to secure the 2026 AI companion at official retail prices today.

DELL Stock Rallies After-Hours As AI Server Revenues

Dell Technologies (DELL) share price soared 38% after-hours on Thursday after the company reported a record-breaking 88% surge in first

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HONG KONG, BEIJING and SHANGHAI, July 9, 2026 /PRNewswire/ -- Grace Investment Machine ("GIM"), an AI-native investment technology company building agentic systems for capital markets,

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The Scientist offers independent, award-winning science journalism, covering the latest life science research, insights, and innovations.

Samsung's profit triples, beating estimates as AI chip demand ...

Samsung Electronics reported an over three-fold surge in fourth-quarter profits, hitting a new record and beating analysts' estimates.

AI Infrastructure Growth Causes Memory Shortage with Server

A severe server DRAM shortage, fueled by the AI arms race, has led to 50% price hikes and left hyperscalers with only 70% of their orders fulfilled, with ripple effects hitting consumer PC

Dell Surges 33% on AI Server Boom, Super Micro Computer Adds

Super Micro Catches the AI Bid Super Micro Computer stock appears to be a sympathy play today, up 16% as Dell's \$60 billion AI server outlook validates the broader hyperscaler capex thesis.

AI Spending Surge Fuels Dell And HPE But Profitability

AI server demand lifts Dell and HPE to record quarters, but rising component costs and thin margins raise questions about how long their

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