

# AI server orders are booming



## Overview

Dell, HPE, Lenovo, and Supermicro are riding record AI server demand, but winning enterprise customers requires more than just Nvidia chips. With GPUs standardized around Nvidia, vendors compete on AI Ops, liquid cooling, and deployment services as enterprises ramp up inference in 2026. Image: Dell's record AI server orders signal a shift away from traditional IT products as demand falters. This momentum will fuel stronger pull-ins for GPUs and ASICs, alongside the rapid expansion of AI inference applications. As a result, global AI server. For decades, Dell Technologies was best known for laptops and desktops that filled homes, offices, and classrooms. 8% in the same period last year to 6. This trend of "increasing revenue without increasing profit" is spreading throughout the industry, fundamentally driven by the fact that the core of AI servers—the. A comprehensive report by Global Market Insights Inc. The market is expected to grow from USD 167. Explosive enterprise AI adoption and proven return on.



## Article Content

Exclusive: Nvidia's H20 chip orders jump as Chinese

SINGAPORE/BEIJING, Feb 25 (Reuters) - Chinese companies are ramping up orders for Nvidia's (NVDA.O), opens new tab H20 artificial intelligence chip due

Strong Demand from CSPs and Sovereign Cloud to

TrendForce's latest analysis of the AI server market shows that demand from CSPs and sovereign cloud deployments will remain robust

HPE gains enterprise traction with private cloud, AI

HPE gains enterprise traction with private cloud, AI-powered servers One-third of the company's AI orders were driven by enterprise-based GPU

Dell stock jumps as strong AI server demand boosts

Dell stock is rising because the company expects very strong demand for AI servers. Big tech companies are spending huge money on AI

AI Server Market Update: Vendors Shift from Silicon to Services

AI Server Market Update: Vendors Shift from Silicon to Services Dell, HPE, Lenovo, and Supermicro are riding record AI server demand, but winning enterprise customers requires more

Commentary: AI server ODMs face margin squeeze as memory costs

As AI server orders surge, system assembly makers are finding that more business does not always mean better profits. High-priced GPUs and soaring memory costs are pushing up

HPE takes \$4.5bn in enterprise IT AI server orders

HPE takes \$4.5bn in enterprise IT AI server orders The server company is prepping everything for greater enterprise artificial intelligence demand

Global AI Server Demand Surge Expected to Drive

TrendForce's latest industry report on AI servers reveals that high demand for advanced AI servers from major CSPs and brand clients is expected

Foxconn Profit Soars On AI Server Revenue Surge

Foxconn delivered record profit by leveraging booming AI Server Revenue, steady NVIDIA H200 supply, and unmatched manufacturing scale. Moreover, its global footprint enabled swift capacity pivots,

DIGITIMES Research highlights the market currents of

However, rather than indicating a decline in demand for AI servers, DIGITIMES Research believes that the previous surge was primarily driven by

ODMs erase seasonal slump as notebooks and AI servers drive

Electronic ODM makers' surge in March revenue, driven by accelerated notebook orders and booming AI server demand, erased the typical first-quarter slump, with implications for global

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Figure AI's Helix 02 humanoid robots neared 40 hours of autonomous work and almost 50,000 packages in a livestreamed warehouse demo. If you can only read one tech story a day, this

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Dell vs. HPE vs. Supermicro: Who's winning the AI

AI server demand is exploding, and Dell, HPE, and Supermicro are locked in fierce competition. Here's how each is shaping the future of enterprise

AI boom pushes Wistron to rapidly scale up server production

The demand for AI remains robust, and visibility is high. Wistron President and CEO Jeff Lin noted that most customers are placing rolling 12-month orders, and current demand is expected

Dell bets on rising AI server demand to forecast higher

Dell forecast fourth-quarter revenue and profit above Wall Street estimates on Tuesday, as increasing investments in data centers to support

Dell's AI business is booming. So why is the stock falling?

Dell ups its guidance for the full year as its AI server business is growing faster than expected. There's a high bar for AI stocks now, plus PC revenue came in lower than expected. Dell

AI Server Market Size & Share, Statistics Report 2025

The AI server market was valued at USD 128 billion in 2024 and is expected to grow at a CAGR of 28.2% between 2025 and 2034, driven by the explosive

Dell AI Server Boom Shows It's No Longer Just a PC

Dell Technologies reported \$12.3 billion in AI server orders in Q3, a record figure that confirms the company is no longer defined by the PC market

The AI server business is booming, but all the profits are being ...

Against the backdrop of surging demand for artificial intelligence, major global AI server manufacturers are facing a common challenge: despite significant revenue growth, profit margins continue to narrow.

### The AI Servers Powering The Artificial Intelligence

IDC expects AI server revenue will reach \$49.1 billion by 2027, assuming that GPU-accelerated server revenue will grow faster than revenue for

Dell's AI server orders surge 612%, driving market demand amid

Dell, the top artificial intelligence (AI) server provider, saw its orders for AI-specialized servers in the first quarter of this year surge more than sevenfold compared to the previous quarter.

FCS sets all-time sales high on booming AI server and

Fu Chun Shin (FCS) hit a new monthly sales record in May 2025, driven by strong demand from AI server and electric vehicle makers. Orders

## Contact Us

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