

AI Server Urgent Orders Surge



Overview

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. Add us as a Google Preferred Source to see more of our articles in your search results. The Dell corporate logo in Bracknell, England, on Jan. This. Dell Technologies (DELL) stock rallied on November 26 after reporting Q3 earnings that beat expectations and issued significantly raised guidance driven by explosive AI server demand. The company posted adjusted EPS of \$2. 0B. 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 prices. The expansion in production by TSMC, SK Hynix, Samsung, and Micron has alleviated shortages in the second quarter.



Article Content

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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
tomshardware 2 Paul Coronado

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

Dells AI server orders surge 612%, driving market demand amid sluggish PC sales
Dells record AI server orders signal a shift away from traditional IT products as demand falters.

Dec 25, 2025 Hot

Dell Stock Surges on \$12.3B AI Server Orders: Retail Impact

Dell's Vice Chair and Chief Operating Officer, Jeff Clark, stated, "AI momentum is accelerating in the second half of the year, leading to record AI server orders of \$12.3 billion and an

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Global AI Server Demand Surge Expected to Drive 2024

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

Feb 26, 2026 Hot

Dell's AI server orders surge; Barclays upgrades its rating to ...

The report showed that Dell's AI servers, thanks to their excellent computing power adaptability, comprehensive ecosystem compatibility, and stable supply chain guarantees, have seen

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How Instacart remade its systems to handle a 500% jump in order

Join our daily and weekly newsletters for the latest updates and exclusive content on industry-leading AI coverage. Learn More Shelter-in-place orders and business closures motivated

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AI server market: cloud giants to command 60% demand in 2024

Challenges amid global demand surge While demand from the cloud-tech giants could rise exponentially, AI server makers could face significant challenges amid geopolitical concerns,

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Surge in AI server demand from cloud service providers:

TrendForce's latest industry report reveals a sustained high demand for advanced AI servers from major cloud service providers (CSPs) and brand

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Global AI Server Demand Surge Expected to Drive 2024 Market

AI server market value is projected to reach over \$187 billion in 2024, with a growth rate of 69%, accounting for 65% of the total server market.

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AI Infrastructure Growth Causes Memory Shortage with

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,

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Dell Technologies Surges on \$64B AI Server Orders and Robust \$43B ...

Dell Technologies is leveraging a massive \$64 billion AI server order pipeline and a \$43 billion backlog to establish its artificial intelligence infrastructure as a primary long-term growth driver.

Sep 26, 2025 Hot

Dell Earnings: \$12.1 Billion Surge in AI Server Orders; Raising Fair ...

However, the real story was Dell's surging artificial intelligence server orderbook, with the backlog soaring from \$4.1 billion last quarter to \$14.4 billion in the current quarter.

Apr 03, 2026 Hot

Dell's AI Server Orders Hit Record \$12.1 Billion In Q1 ...

Vice Chairman and COO Jeff Clarke noted that just 91 days into the year, Dell had already secured \$12.1 billion in AI server orders, a figure that significantly contributed to the

Jul 07, 2025 Hot

DELL Stock Rallies After AI Server Orders Double and

Dell surged after Q3 EPS beat expectations and AI server orders doubled to \$12.3B. The company raised full-year guidance sharply, driving a

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AI server demand surges as Nvidia GPUs, AWS ASICs

Nvidia has overcome key supply constraints tied to its GB200 AI GPU, clearing the way for major server makers like Quanta and Foxconn to ramp

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Dell, HPE reap revenue gains from AI server demand surge

Dell and Hewlett Packard Enterprise got revenue boosts from growing enterprise demand for AI-optimized servers despite the economic uncertainty

Jul 27, 2025 Hot

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.

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Dell Raises Annual Outlook for Shipments of AI Servers

Dell Technologies Inc. raised its annual projections for the key artificial intelligence server market, a sign of sustained demand for the type of

May 19, 2026 Hot

Dell's AI Server Orders Surge 121% Year-Over-Year to \$12.1 Billion

This surge in demand highlights the growing importance of AI infrastructure in the tech industry. Dell's Chief Operating Officer, Jeff Clarke, noted that the company's backlog of unfulfilled

Jun 11, 2026 Hot

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

Jul 24, 2025 Hot

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

The DRAM supply chain is choking, and server memory is taking the first hit, with major U.S. and Chinese hyperscalers now receiving just 70% of the server DRAM they order.

Mar 25, 2026 Hot

Strong AI server demand to drive market value to over

The anticipated surge in demand for HBM underscores the robust growth projections for the AI server market, with overall HBM supply expected to

Feb 19, 2026 Hot

AI server boom sparks urgent infrastructure race

A global surge in demand for AI-optimized servers is fueling rapid deployment of modular data centers by companies like LG CNS and Duos Edge AI, while Dell posts record AI server sales.

Dec 08, 2025 Hot

FinancialContent

TrendForce observes that demand for advanced AI servers is expected to remain strong through 2025, especially with NVIDIA's next-generation Blackwell (including GB200, B100/B200) set

May 12, 2026

Contact Us

For more information, pricing, or custom solutions, please contact us:

Website: <https://www.eedenmarketing.co.za>

Email: info@moletenare-ew.co.za

Phone: +86 138 1658 3346

Address: Ningbo, China

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