



**Adam Tas Corridor Energy**

# **AI servers are in short supply**





## Overview

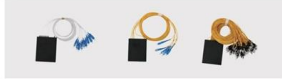
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According to a report in The Register, PMICs and server management silicon (think BMCs) are now in widespread shortage as manufacturers prioritize higher-margin AI servers over conventional systems. In short: AI has made power delivery the new battleground—and it's reshaping the entire server supply chain. To meet these needs, consumer devices tend to rely on systems-on-a-chip - chips that combine processing and storage - with dynamic random access memory. A growing memory chip shortage is beginning to affect the broader tech and automotive industries, driven by surging demand for artificial intelligence infrastructure. Geopolitical risk is compounding AI-driven demand, tightening availability across PCBs, semiconductors, optics, and power components. The rapid build-out of AI data centers is consuming enormous amounts of high-end memory.



## AI servers are in short supply

Optical splitter cassette type refers to the port 2.0mm/3.0mm slip-on fiber multichannel direct output with a plastic box packaging protection and easy to use.



Optical splitter rack mount type is using metal box packaging which can be installed in 1U frame or cabinet.



Optical splitter LSA box type is made by flame retardant material box or plate packaging. Mainly suitable for cable ports fiber box and wall-mounted terminal box.



Optical splitter mini type refers to the port 0.9mm slip-on fiber multichannel direct output with a compact design and easy to use.



## Memory price surge lifts Samsung, SK hynix and Micron

Memory price surge driven by AI capacity grabs  
Market watcher TrendForce expects conventional DRAM contract prices to rise around 55-60%

## 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



## ITPro Today, Network Computing, IoT World Today combine

ITPro Today, Network Computing and IoT World Today have combined with TechTarget . The page you are looking for may no longer exist.

## Memory in Short Supply as AI Growth Strains Supply Chain

Chipmakers are now funneling production resources toward the more profitable high-



bandwidth memory (HBM) used in AI servers, reducing the availability of standard server memory



### What we know about energy use at U.S. data centers

This is especially true at AI-optimized hyperscale data centers, whose advanced servers are equipped with powerful computer chips that can perform



### How AI Data Centres Are Exposing US Power System Limits

AI workloads are redefining how data centres consume energy. Traditional server racks operate at between 5kW and 10kW, yet AI-optimised racks now reach between 50kW and 100kW.



### 2026 Memory Price Forecast , TrendForce

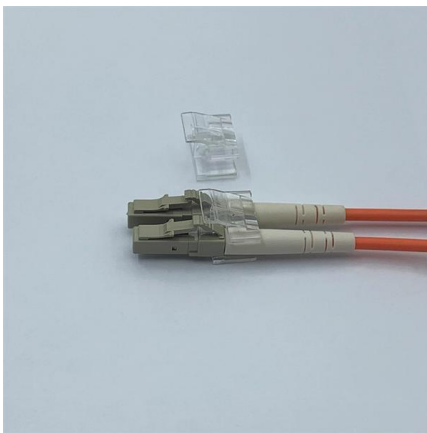
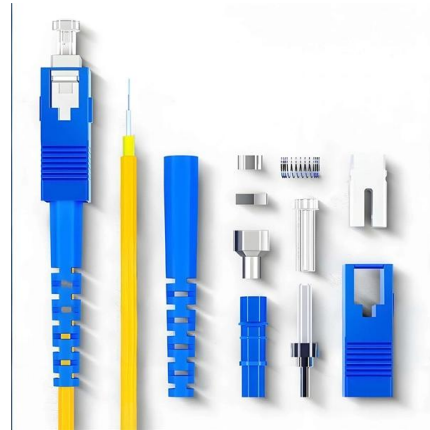
TrendForce forecasts a structural memory price hike by 2026. Strong AI server demand and profit-first supplier strategies lead to capacity shifting





## The AI frenzy is driving a memory chip supply crisis

Tech giants including Microsoft (MSFT.O), Google (GOOGL.O) and ByteDance are scrambling to secure supplies from memory-chip makers such as



## AI Memory Shortage 2026: What IT Leaders Need to Know

AI is driving a structural memory chip shortage affecting server, laptop, and networking costs. Learn what's causing it and how to protect your organization.

## MLCC Price Increases Threaten AI Server Build Costs

Murata Manufacturing is evaluating price increases for multilayer ceramic capacitors (MLCCs) used in AI servers, signalling renewed cost pressure across the electronics supply chain.



## CPU requirements for AI workloads are multiplying, driving intensifying

CPU requirements for AI workloads are multiplying, driving intensifying shortages and price hikes -- Intel already shifting production from consumer chips to Xeon as inference workloads



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Welcome to Channel Dive. We're Informa TechTarget's new publication, focused on delivering daily news and analysis for executives at North

Length:33.5mm  
Small-end inner diameter:4.0mm  
Large-end inner diameter:6.0mm



## AI Hardware Supply Chains Tested as Iran Tensions Rise

PCBs have emerged as a pressure point as AI server complexity increases demand for copper foil, laminates, and specialty chemicals. Alamy Escalating conflict involving Iran is raising

## AI data center boom is leaving consumer electronics short of chips

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The boom in data center construction is taking up much of the supply of high-tech components, especially processor and memory chips. This demand is squeezing consumer device



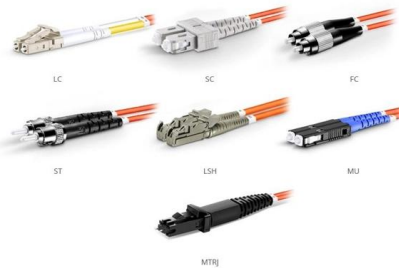


## Why liquid cooling will dominate AI data centres in 2026

As AI power demands surge into 2026, liquid cooling is becoming the essential technology keeping data centres efficient, stable, and future-ready.

## Hardware Shortages and Lead Times: How AI Demand Is Impacting

The global technology supply chain is undergoing a structural shift driven by the rapid expansion of AI infrastructure. As demand for AI systems accelerates, manufacturers are prioritizing production



OM3 Fiber Patch Cable Family



## 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

## Supply Chain Shortages for NVIDIA AI GPUs Improve, AI Server

Since last year, NVIDIA's AI GPUs have been in short supply, causing longer delivery cycles. However, the situation is improving with strengthened shipments and new-generation



### AI Servers Are Draining the Power Chip Supply: PMIC and BMC

According to a report in The Register, PMICs and server management silicon (think BMCs) are now in widespread shortage as manufacturers prioritize higher-margin AI servers over

### AI Server Market Size, Vendor Shares, and Investment

ABI research's latest report evaluates the surging AI server market. It forecasts market size through 2030, reveals vendor shares, and identifies key



### Dell slides as high AI server costs, competition blunt

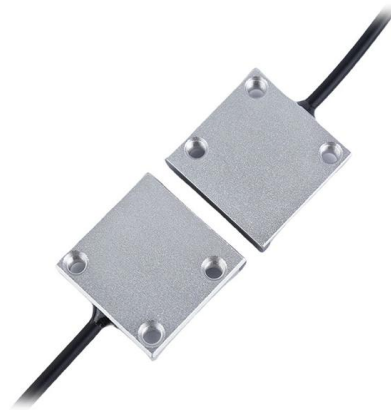
Shares of Dell Technologies fell about 10% on Friday, as high manufacturing costs for AI-optimized servers and intensifying competition





## Riding the AI Supercycle: Navigating the 2026 Memory

Navigate the AI-Driven Supercycle The memory and storage market has entered a multi year, AI driven supercycle, as suppliers shift aggressively



## Building data centers bigger, faster , McKinsey

In the short-term, AI training models are the primary driver of this increase in size and scale. The data centers of the future, however, are likely to

## Statista

Apple Mac processors The x86 processor is the predominant hardware platform for laptops, desktops, and servers globally.



## 2026 Semiconductor Industry Outlook , Deloitte Insights

Deloitte's 2026 global semiconductor industry outlook seeks to identify the strategic issues and opportunities for semiconductor companies and other parts of the



## MLCC Shortages Return as AI Server Demand Strains Capacity

High-capacitance Multi-Layer Ceramic Capacitors (MLCCs) are entering a period of restricted availability as tier-one manufacturers divert production lines to support the rapid expansion



## The Hidden Crisis in AI Right Now: Server Memory Is In

This article breaks down why the shortage is accelerating, what modern GPU servers actually require, and how teams can avoid the hidden cost traps shaping today's

## The Great AI Silicon Shortage

With compute in short supply but DC power available, AI labs will take whatever usable compute they can secure. Nvidia is once again the primary





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