

AI server capacity gap





Overview

Azure growth and a \$627B backlog show AI demand outpacing power, cooling, and data center build capacity. Out of 12 GW of AI data center capacity announced for this year, only about 5 GW is under active construction. The rest — billions of dollars in planned infrastructure — sits stalled by power grid bottlenecks, electrical component shortages, Chinese tariff impacts, and growing community opposition. Microsoft's AI-driven cloud demand is growing faster than it can physically deliver, widening the gap between bookings and delivery even as revenue surges. 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 of artificial intelligence infrastructure.



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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

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2026 Market Outlook: SK hynix's HBM to Fuel AI Memory Boom

Market research firms and investment banks anticipate particularly high growth for server and data center memory, with some estimating the 2026 memory market size to exceed \$440 billion.

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DDR5 Supply Shortfall Drives Prices Higher; 2026

Tariffs and policy changes kept early demand cautious, but cloud expansion and AI investment have lifted memory demand and pricing, tightening

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The company's Azure AI Foundry alone processed 500 trillion tokens this year, underscoring the explosive growth of AI workloads. Yet, this surge in

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As the demand for data center capacity continues to outpace supply, the winners will be those who can scale efficiently, innovate sustainably, and

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MLCC Shortages Return as AI Server Demand Strains Capacity

Damian Semple, Franchise Marketing Manager, comments: "The divergence between AI-driven demand and general industrial recovery is creating a dangerous procurement gap for standard

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AI data center growth: Meeting the demand , McKinsey

Our analysis suggests that demand for AI-ready data center capacity will rise at an average rate of 33 percent a year between 2023 and 2030 in a

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7 shortages challenging AI data center expansion

AI data centers can require dramatically more energy per square foot than traditional data centers. This miniseries, based on Deloitte's 2025 AI



2026 AI Business Predictions

Explore PwC's 2026 AI predictions and learn how focused strategies, agentic workflows, and responsible innovation drive transformative business value.

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MIT Technology Review

MIT Technology Review's authoritative overview of the 10 technologies, emerging trends, bold ideas, and powerful movements in AI in 2026.

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AI Security Burden Outpaces Defender Skills in 2026



Three Moves to Close the Defender Capacity Gap on AI Security The sequencing matters: governance frames what is permitted, detection logic narrows what is escalated, and headcount or

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AI infrastructure gaps , Deloitte Insights

The AI age is expected to require scaling data centers, grid capacity, and supply chains. Deloitte's 2025 AI Infrastructure Survey examines gaps and solutions.

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Is There Enough Data Center Capacity for AI?

Data center capacity drops to around 80% by the end of the decade in Goldman Sachs Research's "AI Downside" scenario. Then again, if heavy

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Power crisis looms: PJM warns of grid collapse as AI servers and

PJM Interconnection's grid faces capacity crunch amid AI data center boom. AI servers now consume twice as much power as older models, straining the eastern U.S. grid. Retired fossil fuel

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Memory Makers Prioritize Server Applications, Driving

Conventional DRAM contract prices in 1Q26 are forecast to rise 55-60% QoQ, while NAND Flash prices are expected to increase 33-38% QoQ

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Majestic Labs nabs \$100M to build AI servers with 1000x



Majestic's core breakthrough is an AI server that delivers 1000x the memory capacity of a top-tier GPU, consolidating what would typically require ten

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AI boom exposes infrastructure gaps: APAC's data

Asia-Pacific could face a shortfall of 15 to 25 gigawatts of data center capacity by 2028, even as the region's installed base expands from 13.3 GW

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U.S. AI Data Center Delays: 7 GW Capacity Crisis

Nearly half of U.S. AI data centers planned for 2026 have been canceled or delayed. Inside the 7 GW capacity gap, power grid bottlenecks, and \$650B buildout crisis.

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Announced vs Built Gap: 7 GW of Stalled AI Infrastructure

Only 12 GW of AI data center capacity is under active construction against 50 GW announced. Here is what the announced vs built gap means for enterprise AI, investors, and

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AI, Grid Constraints And The Real Power Crisis Facing

By 2030, industry analysts expect global data center power requirements to rise by 165%, with a 50% leap as soon as 2027--much of it



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The Growing Gap Between AI Demand and Ready-to-Use Capacity

AI adoption can move in months. Utility upgrades, transformer procurement, permitting, and large facility construction often take years. That mismatch is widening the gap between the

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Addressing HR's widening capacity gap with AI

The widening capacity gap in HR won't close on its own, but with the right data foundation, trusted AI, and experienced partners, it can become a catalyst for organizational change.

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