

AI server orders surge



Overview

The rapid growth of AI inference services is boosting demand for general-purpose servers, supporting both replacement and expansion efforts. Consequently, TrendForce predicts that total global server shipments, including AI servers, will accelerate from 2025, with a 12.8% YoY. President Trump's endorsement of Dell boosted its stock, but fundamentals drive long-term growth. AI-optimized servers are growing rapidly, with improving operating leverage. The numbers don't lie—enterprise customers are driving unprecedented demand for AI infrastructure, and Dell is making the most of this incredible opportunity. We delivered record-breaking results in our second quarter—record revenue of \$29. AI server orders broke records, and profitability in this part of the business returned to expected levels. The company recorded unprecedented AI server orders totaling \$12.

Article Content

Jul 14, 2025

Dell Riding Nvidia's Tailwinds To Record \$12.1B In AI Server Orders ...

Dell reported surging demand in AI optimized servers in Q1 with orders of \$12.1 billion. This outpaces the entirety of last year while representing a 612% sequential increase from \$1.7B last quarter.

May 13, 2026

Dell's AI Orders Are Surging

Dell's AI server demand drives a \$49B backlog, signaling robust growth and a 16% upside potential. Explore why DELL stock remains a strong Buy.

Dec 03, 2025

Trump's Remark Ignites Dell Shares: AI Server Leader Surges 13% to ...

TradingKey - On May 8, Eastern Time, U.S. President Trump's remark to "go buy a Dell (DELL) computer" caused shares of the core AI server supplier to jump more than 14% intraday. The ...

Oct 12, 2025

AI infrastructure stocks surge as Dell, DigitalOcean, Intel post ...

AI infrastructure stocks surge as Dell, DigitalOcean, Intel post big gains Dell's AI momentum: Dell projects \$50 billion in AI revenue this year, supported by strong server orders, a ...

Oct 15, 2025

DELL Stock Forecast: AI Orders Surge, Margins Still a Concern

AI server orders broke records, and profitability in this part of the business returned to expected levels. Dell will need to execute strongly on its AI server demand in the long term and ...

May 27, 2026

Dell's Fiscal 2026 Earnings Exceed Expectations, fueled ...

Dell Technologies' fiscal 2026 results exceeded expectations with US\$64B in AI server orders, driving a 22% surge in stock price and a strong outlook for 2027.

Feb 03, 2026

Enterprise Demand is Fueling Dell's AI Infrastructure Leadership

Here's a snapshot of the enterprise AI momentum we're seeing: Historic enterprise AI demand surge. Q2 delivered our strongest enterprise AI quarter ever with the most enterprise orders ...

Jan 10, 2026

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. ...

Sep 12, 2025

Dell's Fiscal 2026 Earnings Exceed Expectations, fueled by \$64B in AI ...

Dell Technologies' fiscal 2026 results exceeded expectations with US\$64B in AI server orders, driving a 22% surge in stock price and a strong outlook for 2027.

Feb 18, 2026

Global AI Server Shipments Forecast to Grow Over 28% YoY in 2026, ...

Global server shipments are projected to grow 12.8% YoY in 2026, while AI server shipments are expected to surge by more than 28% YoY Google and Microsoft are set to ramp up ...

Feb 07, 2026

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 ...

Contact Us

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