Leading memory manufacturers, including Samsung, Micron, and SK hynix, have intensified their competition for dominance in the HBM3E market – the new generation of high-speed memory that is in demand for working with artificial intelligence (AI). Amid trade tensions and supply instability, companies are aiming to accelerate production to secure advantageous positions against potential new tariffs from the US.

According to Korean media, Samsung is preparing to begin mass production of HBM3E as early as next month. However, the company is still awaiting approval from NVIDIA, which needs to validate the quality of their solutions. Despite lagging behind competitors in HBM technology, Samsung is optimistic about a deal with NVIDIA to bridge this gap.

Meanwhile, Micron, as reported by Sisa Journal, has already launched mass production of a 12-layer version of HBM3E and plans to use it in NVIDIA’s new server systems, called Blackwell Ultra B300. Reports indicate that Micron’s production lines are operating at full capacity, and the company is actively scaling up, vying for market share currently held by SK hynix.

With growing interest in new solutions for AI and increased demand for energy-efficient and fast memory, the race for HBM3E is heating up. Companies are already looking ahead – to HBM4 – and striving to solidify their positions as early as possible. Amid uncertainty, NVIDIA is also keen on diversifying suppliers and reducing dependence on a single manufacturer.