

SK Hynix expects the market for specialized memory chips for artificial intelligence (AI) will grow by about 30% annually and by 2030 will reach tens of billions of dollars. We are talking about high-speed HBM memory used in complex AI applications.

HBM first appeared in 2013 and has a vertical layout of the chips, which saves space and reduces energy consumption. As SK Hynix technologies develops and other manufacturers, including Samsung Electronics and Micron Technology, introduce special logical crystals for memory management in new models, which makes products unique for each client and complicates the replacement of competitors analogues.

The company notes that so far an individual memory setting is available mainly to large customers like NVIDIA, but in the future the demand for personalized solutions will grow. This trend, according to SK Hynix, will become one of the key growth factors.

At the same time, price fluctuations are possible on the market. Samsung recently warned that the proposal of HBM3E chips may soon exceed demand. Despite this, SK Hynix shares this year increased by more than 50%, which is much higher than the Kospi index.

Foreign trade may be influenced by US policy. President Donald Trump announced plans to introduce a 100% tariff for the import of semiconductors from countries that do not produce them in America. South Korean SK Hynix and Samsung will probably not fall under these measures, as they are already investing in plants and development centers in the United States.