Server

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New CPUs Driven by Agentic AI: Ratio of GPUs and Analysis on Structural Changes of Further Shortages for CPUs

Topology Research Institute

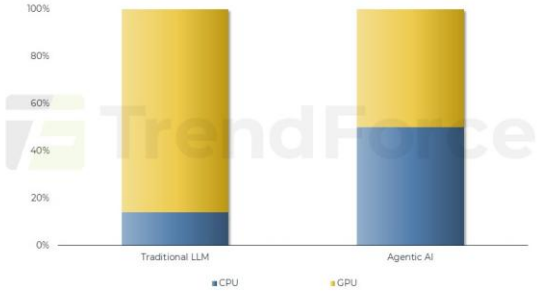
On March 16th 2026, NVIDIA used GTC to debut the first standalone Vera CPU Rack for sale. On March 25th, Arm announced its own Arm AGI CPU and introduced two CPU rack variants (air‑cooling and liquid‑cooling), formally entering the in-house CPU market. These moves show that CPUs are becoming increasingly critical in AI data centers, and that overall demand is undergoing a structural shift. Recently, tight CPU supply, together with news that Intel and AMD are both raising prices at the end of 1Q26, has become a key focus for the market.

This report provides an in-depth analysis of: (1) the importance of CPUs in Agentic AI applications, (2) the competitive landscape of the CPU market in 2026, and (3) business opportunities in back-end CPU design services. The goal is to clarify CPU demand drivers in the era of rapidly growing Agentic AI, competitive dynamics among vendors, as well as newly emerging potential opportunities.

11F, No.70. Sec. 3, Nanjing E.
Rd., Taipei City 104, Taiwan

Tel: +886-2-89786498
Fax: +886-2-25016399

Changes to CPU:GPU Ratio among Agentic AI Applications



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