

Market Briefing - Component Market: Motherboards in Freefall as AI Soaks Up the Silicon

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Global PC shipments returned to growth in Q1 2026, but the apparent recovery is driven more by inventory tactics and pre-emptive buying than by durable end-user demand. At the same time, leading motherboard makers are guiding for shipment declines of more than 25% as manufacturing capacity is redirected toward AI and data-center components, tightening the screws on the traditional PC ecosystem. From an industry-analysis lens, this is a split-personality market: short-term unit growth with long-term structural headwinds, rising prices, and a gradual pivot of silicon and board supply away from mainstream PCs and toward AI infrastructure.

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