Industry Analyst Jeff Kagan: Will Qualcomm AI Data Center Strategy Launch Its Next Growth Era

Tech Analyst Jeff Kagan Says Qualcomm May Be Entering Its Next Potential Major Growth Wave


Jeff Kagan Industry Analyst

NEW YORK, NY, UNITED STATES, June 30, 2026 /EINPresswire.com/ -- Technology Analyst Jeff Kagan, who has followed Qualcomm and the wireless industry for decades, says the company's expanding focus on artificial intelligence, AI data centers, autonomous driving and edge computing may represent the beginning of its next major growth cycle.

As Qualcomm broadens its business beyond smartphones, Kagan believes the company's AI strategy could create significant long-term growth opportunities for investors, customers, employees and the technology industry.

"Qualcomm has repeatedly demonstrated its ability to evolve as technology markets change," said Kagan. "The company built its leadership in wireless, then expanded into smartphones and mobile computing. Now it appears to be positioning itself for another transformation driven by AI."

Qualcomm became one of the world's leading technology companies through its wireless innovations and mobile chip technology. However, as smartphone growth matured and the wireless industry slowed over the past decade, Qualcomm like many technology companies faced increasing pressure to identify its next major growth opportunity.

According to Kagan, AI may now provide that opportunity.

"During the past decade, there were times I questioned Qualcomm's long-term growth potential," Kagan said. "The slowdown affected not only Qualcomm, but much of the wireless equipment, networking and communications sectors. Today, AI is creating an entirely new growth runway through AI data centers, autonomous driving, edge computing and other emerging technologies."

> Jeff Kagan is available for media interviews and further discussion with company executives."
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Among Qualcomm's key growth initiatives are:

• AI Data Centers: Qualcomm recently introduced its Dragonwing server platform, positioning the company to compete in the rapidly expanding AI infrastructure market. Some industry forecasts suggest Qualcomm could generate as much as $15 billion in annual AI data center chip revenue by 2029.

• Automotive: Qualcomm continues expanding its presence in connected and autonomous vehicles. Industry projections suggest this business could become a $10 billion annual revenue opportunity by 2029.

• Physical AI and Edge Computing: Qualcomm is extending its AI capabilities into robotics, industrial automation, edge devices, PCs, smartphones and other intelligent connected technologies.

"The key question is whether Qualcomm has finally found its next long-term growth engine," Kagan said. "If these initiatives continue gaining momentum, I believe the company could be entering another significant period of sustained growth."

Kagan noted that Qualcomm's current strategy reflects a broader transformation taking place across the technology industry as AI reshapes nearly every market segment.

"I've always viewed Qualcomm as one of the strongest technology innovators," he said. "Like many companies in wireless, growth slowed as that market matured. Some competitors struggled to redefine themselves. Qualcomm now appears to have identified several high-growth markets that could drive the company's next chapter."

Qualcomm competes across multiple technology sectors with companies including Huawei, Samsung, Apple, Nvidia, Intel, AMD, Broadcom, MediaTek, NXP, Ericsson, Nokia, Cisco, Oracle, Amdocs, ZTE and others.

"Going forward, I will continue watching Qualcomm closely and offering commentary as this strategy unfolds," Kagan added. "At this point, I believe the company has found a promising new direction. The next several years will determine whether AI becomes the long-term growth engine that many investors and industry observers expect."

About Jeff Kagan

Jeff Kagan is an Industry Analyst, Strategic Advisor, Tech Influencer (TechFluencer) and Columnist who covers the companies and technologies transforming business and society, including artificial intelligence, wireless communications, telecommunications, broadband, pay television, IoT and related technology sectors.

Over more than four decades, Kagan has advised CEOs and senior leadership teams while writing thousands of columns and articles that translate complex technology trends into practical business insights.

AT&T Executive Vice President of Public Relations (Retired) Dick Martin recognized Kagan's influence in his book Tough Calls: AT&T and the Hard Lessons Learned from the Telecom Wars, writing: "Jeff Kagan has been described as the most widely quoted analyst in the telecommunications industry."

Companies interested in speaking with Jeff Kagan are invited to submit an email inquiry.

Media: This commentary may be used in coverage of this story.

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