

Tony Bloomberg at Sun Valley 2026: AI Enters Its Industrial Age

As leaders gather at the Allen & Company Sun Valley Conference, investor Tony Bloomberg argues that artificial intelligence has entered its industrial age.

NEW YORK, NY, UNITED STATES, June 30, 2026 /EINPresswire.com/ -- Artificial intelligence is entering a new phase of development.

For the past several years, the AI revolution has been defined by software, large language models, semiconductors and unprecedented advances in computational capability. That phase transformed what artificial intelligence could achieve.

The next phase will be defined by something very different.

Increasingly, the limiting factor is no longer software alone. It is the physical infrastructure required to build, power and sustain artificial intelligence at global scale.

Against this backdrop, global investor [Tony Bloomberg](#), Head of the [Blumberg](#) Family Office, will return to the invitation-only Allen & Company Sun Valley Conference in Idaho, where many of the world's most influential leaders in technology, finance, investment and media gather annually to exchange ideas on the forces reshaping the global economy.

Blumberg, whose investment experience spans more than three decades across mining, natural resources, infrastructure and long-duration capital allocation, believes artificial intelligence has entered what he describes as its "industrial age"—a period in which future growth will increasingly depend on access to [critical minerals](#), energy systems and physical infrastructure rather than computational advances alone.

Critical minerals, copper, rare earth elements, electricity generation, transmission capacity and data centre infrastructure are rapidly emerging as the strategic foundations of the next phase of artificial intelligence.

For decades, mining and heavy infrastructure were viewed as part of the traditional economy. Artificial intelligence is now redefining them as strategic industries of the digital economy.

The constraint is no longer computational capability alone. Increasingly, it is the availability of

electricity, transmission capacity and the critical minerals required to build and power hyperscale computing infrastructure. While AI models can be developed in months, the physical systems that support them often require years—or even decades—to permit, finance and construct.

As governments, technology companies and investors race to expand artificial intelligence capabilities, the challenge is becoming less about building more powerful models and increasingly about building the physical systems capable of supporting them.

"Artificial intelligence is entering its industrial phase," said Blumberg. "The conversation is no longer only about what AI can do. It is about what AI requires to exist at scale."

"For years, AI was discussed as though it existed purely in software. In reality, every model, every data centre and every computation depends on materials that must be mined, processed and delivered through complex industrial systems. Before intelligence can be artificial, the materials must first be real."

Blumberg believes the investment implications of this transition are only beginning to be recognised.

"The next phase of AI will not be defined solely by breakthroughs in software. It will also be defined by access to energy, infrastructure and critical minerals. These constraints will increasingly shape the pace and geography of AI development around the world."

The Allen & Company Sun Valley Conference has long served as one of the world's most influential private forums for discussions surrounding technology, investment, media and global business. As artificial intelligence continues to reshape industries and economies, Blumberg expects conversations to increasingly focus on the physical foundations required to support the next generation of AI.

Rather than representing a purely digital transformation, he believes artificial intelligence is becoming a convergence of software innovation, industrial capability and long-term capital investment.

"The first chapter of artificial intelligence belonged to software. The next chapter will be written in copper, energy and critical minerals."

About Tony Blumberg

Tony Blumberg is a global investor and Head of the Blumberg Family Office. With more than 35 years of international investment experience, he focuses on mining, natural resources, infrastructure, technology and long-duration strategic assets. His investment philosophy emphasises disciplined capital allocation, risk management and identifying structural shifts at the intersection of technology, commodities and the global economy.

About Blumberg Family Office

Blumberg Family Office manages global investments across mining, infrastructure, technology and critical resources, with an emphasis on disciplined capital allocation, risk management and long-term value creation.

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