

Global Automotive Grade Flash Memory Chip Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Automotive Grade Flash Memory Chip market size is expected to reach \$ 12331 million by 2032, rising at a market growth of 7.9% CAGR during the forecast period (2026-2032).

Automotive Grade Flash Memory Chip is a type of non-volatile memory specifically designed for automotive electronic systems. It features high reliability, durability, wide temperature ranges (typically -40°C to 125°C or broader), and compliance with stringent automotive quality and safety standards (e.g., AEC-Q100). These chips are primarily used to store program code, map data, multimedia content, and data for advanced driver assistance systems, making them essential for applications such as autonomous driving, in-vehicle infotainment, information displays, and powertrain management.

The upstream segment includes suppliers of high-purity silicon wafers, photoresists, mask blanks, specialty gases, wet chemicals, packaging substrates, lead frames, bonding wires, and molding compounds. The midstream segment encompasses wafer fabrication, packaging, testing, reliability verification, and quality certification performed by specialized memory manufacturers. Automotive grade flash memory chips are categorized by interface type into SPI NOR Flash (serial interface), Parallel NOR Flash, and NAND Flash (including eMMC and UFS); by density into low-density (8Gb); by temperature grade into Grade 3 (-40°C to 85°C), Grade 2 (-40°C to 105°C), and Grade 1 (-40°C to 125°C); by application into ADAS & autonomous driving, infotainment & cluster, powertrain & chassis, and body electronics & gateways. The downstream segment serves automotive OEMs, Tier-1 suppliers, and module manufacturers through direct sales and distribution channels.

The global average selling price for automotive grade flash memory chips is approximately US\$2.54 per unit, with annual sales volume reaching approximately 2.77 billion units in 2025. The industry maintains gross margins between 25% and 35%, reflecting the balance between automotive-grade quality requirements and competitive market dynamics.

The global automotive grade flash memory chip market is experiencing robust growth, driven by the accelerating adoption of software-defined vehicles, the proliferation of ADAS and autonomous driving technologies, and the increasing demand for high-performance in-vehicle infotainment systems. As vehicles evolve from transportation tools to intelligent mobile devices, the demand for higher-density, faster, and more reliable memory solutions continues to escalate.

A notable trend reshaping the market is the transition to higher-performance embedded memory standards. Kioxia has commenced sampling of UFS Ver. 4.1 embedded flash memory devices for automotive applications, offering sequential read performance approximately 2.1 times faster and sequential write performance 2.5 times faster than the previous UFS 3.1 generation. These devices, available in capacities up to 1TB and meeting AEC-Q100/104 Grade 2 standards, are designed to support infotainment, ADAS, telematics, domain controllers, and vehicle computers. The introduction of advanced features such as WriteBooster Buffer Resizing and enhanced diagnostic capabilities enables predictive maintenance and more efficient system monitoring.

Another significant development is the ongoing shift from distributed ECU architectures to domain and zonal controllers. This architectural evolution consolidates multiple electronic control units, increasing the memory requirements per vehicle while reducing the total number of discrete chips. Consequently, higher-density flash memory solutions are gaining market share, with 512GB and 1TB devices becoming increasingly common in premium vehicle platforms.

This report studies the global Automotive Grade Flash Memory Chip production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Automotive Grade Flash Memory Chip and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Automotive Grade Flash Memory Chip that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Automotive Grade Flash Memory Chip total production and demand, 2021-2032, (Million Units)

Global Automotive Grade Flash Memory Chip total production value, 2021-2032, (USD Million)

Global Automotive Grade Flash Memory Chip production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Million Units), (based on production site)

Global Automotive Grade Flash Memory Chip consumption by region & country, CAGR, 2021-2032 & (Million Units)

U.S. VS China: Automotive Grade Flash Memory Chip domestic production, consumption, key domestic manufacturers and share

Global Automotive Grade Flash Memory Chip production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Million Units)

Global Automotive Grade Flash Memory Chip production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

Global Automotive Grade Flash Memory Chip production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

This report profiles key players in the global Automotive Grade Flash Memory Chip market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Renesas Electronics Corporation, ISSI (Integrated Silicon Solution Inc.), Infineon Technologies AG, Macronix International Co., Ltd., Winbond Electronics Corporation, Micron Technology, Inc., GigaDevice Semiconductor Inc., Microchip Technology Inc., Dosilicon Co., Ltd., Elite Semiconductor Microelectronics Technology Inc., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Automotive Grade Flash Memory Chip market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Million Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years

2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Automotive Grade Flash Memory Chip Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Automotive Grade Flash Memory Chip Market, Segmentation by Type:

Low Density (8Gb)

Global Automotive Grade Flash Memory Chip Market, Segmentation by Temperature Grade:

Grade 3 (-40°C to 85°C)

Grade 2 (-40°C to 105°C)

Grade 1 (-40°C to 125°C)

Global Automotive Grade Flash Memory Chip Market, Segmentation by Read Speed:

Standard (
High-Speed (100-500 MB/s)

Ultra-High-Speed (>500 MB/s)

Global Automotive Grade Flash Memory Chip Market, Segmentation by Application:

Commercial Vehicles

Passenger Vehicles

Companies Profiled:

Renesas Electronics Corporation

ISSI (Integrated Silicon Solution Inc.)

Infineon Technologies AG

Macronix International Co., Ltd.

Winbond Electronics Corporation

Micron Technology, Inc.

GigaDevice Semiconductor Inc.

Microchip Technology Inc.

Dosilicon Co., Ltd.

Elite Semiconductor Microelectronics Technology Inc.

Fudan Microelectronics Group Co., Ltd.

Giantec Semiconductor Corporation

Puya Semiconductor Co., Ltd.

Wuhan Xinxin Semiconductor Manufacturing Co., Ltd.

Xintianxia Technology Co., Ltd.

Samsung Electronics Co., Ltd.

Kioxia Corporation

Intel Corporation

Western Digital Corporation

Key Questions Answered:

1. How big is the global Automotive Grade Flash Memory Chip market?
2. What is the demand of the global Automotive Grade Flash Memory Chip market?
3. What is the year over year growth of the global Automotive Grade Flash Memory Chip market?
4. What is the production and production value of the global Automotive Grade Flash Memory Chip market?
5. Who are the key producers in the global Automotive Grade Flash Memory Chip market?
6. What are the growth factors driving the market demand?

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