

Global Automotive-grade NAND Flash Memory Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

<https://marketpublishers.com/r/G517F8B0B70DEN.html>

Date: August 2026

Pages: 130

Price: US\$ 3,480.00 (Single User License)

ID: G517F8B0B70DEN

Abstracts

According to our (Global Info Research) latest study, the global Automotive-grade NAND Flash Memory market size was valued at US\$ 1832 million in 2025 and is forecast to a readjusted size of US\$ 4295 million by 2032 with a CAGR of 12.4% during review period.

Automotive-grade NAND Flash Memory refers to non-volatile flash memory devices used in automotive electronic systems for high-density code storage, system boot, application loading, data logging, OTA updates, image buffering and vehicle event data retention. The category mainly includes SLC NAND, SPI NAND, parallel NAND, eMMC, UFS and BGA embedded managed NAND storage. Key upstream inputs include silicon wafers, photoresists, electronic gases, wet chemicals, sputtering targets, CMP materials, packaging substrates, solder balls, bonding materials, test probes, NAND controllers, ECC algorithms, firmware, wafer fabrication and assembly/testing services. Major downstream customers include automakers, Tier 1 automotive electronics suppliers, intelligent cockpit and infotainment system makers, ADAS and autonomous driving domain controller suppliers, T-Box and gateway vendors, camera and sensor module manufacturers, and event data recorder suppliers. The global effective capacity in 2025 is estimated at about 960 million units, shipments at about 743 million units, average selling price at about USD2.39 per unit, and mainstream gross margin at around 31%~45%.

From the current market perspective, automotive-grade NAND Flash Memory is expanding from traditional infotainment, instrument cluster and navigation storage to higher-value applications such as intelligent cockpits, telematics, ADAS, domain controllers and OTA update systems. As vehicle E/E architecture evolves from

distributed ECUs to domain controllers and centralized computing platforms, the amount of software code, map data, log data and multimedia data in vehicles continues to increase, driving stronger demand for automotive-grade SLC NAND, SPI NAND, eMMC and UFS. Compared with NOR Flash and EEPROM, NAND Flash offers a stronger cost-per-capacity advantage and is better suited for medium- and high-density data storage, while still coexisting with other non-volatile memories for fast boot, code execution and small-volume parameter retention.

From the supply-side perspective, the global automotive NAND Flash market is shaped by international memory vendors, specialty flash suppliers, embedded storage solution providers and emerging Chinese suppliers. Global memory leaders have advantages in NAND wafer technology, UFS/eMMC controllers, firmware algorithms and automotive qualification systems, mainly serving mid- to high-end intelligent cockpit, ADAS and domain controller platforms. Taiwanese and mainland Chinese suppliers are more focused on SPI NAND, SLC NAND, automotive eMMC and domestic substitution opportunities. Since automotive customers place strict requirements on quality stability, long-term supply, failure-rate control and platform qualification, new entrants usually face a long design-in cycle, making reliability records and customer qualification experience more important than short-term pricing.

In terms of future technology trends, automotive-grade NAND Flash will continue to move toward higher density, higher bandwidth, wider temperature range, stronger reliability and enhanced security. Intelligent cockpits, cockpit-driving integration and autonomous driving compute platforms will accelerate the migration from eMMC to UFS, improving system boot, application loading, map reading, image buffering and multitasking performance. Automotive displays, T-Boxes, gateways, clusters and communication modules will still maintain strong demand for SPI NAND and SLC NAND, as these products offer a practical balance between cost, density and stability. With OTA updates becoming routine, memory devices will also require stronger data integrity protection, bad-block management, power-loss protection, ECC correction and secure boot support.

Growth momentum mainly comes from rising NEV penetration, richer intelligent cockpit configurations, higher ADAS installation rates, more in-vehicle cameras, wider OTA adoption and automakers' increasing focus on local supply chain security. Key constraints include long automotive qualification cycles, slow Tier 1 and OEM design-in processes, cyclical NAND pricing, the dominance of a limited number of global suppliers in high-end automotive UFS, and the need for some local vendors to further build large-scale production consistency and global customer qualifications. Overall, automotive

NAND Flash remains a growth market, but future competition will shift from simple price and capacity competition toward comprehensive capabilities in automotive reliability, interface performance, firmware, lifecycle management and stable supply.

This report is a detailed and comprehensive analysis for global Automotive-grade NAND Flash Memory market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Automotive-grade NAND Flash Memory market size and forecasts, in consumption value (\$ Million), sales quantity (Million Units), and average selling prices (US\$/Unit), 2021-2032

Global Automotive-grade NAND Flash Memory market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Million Units), and average selling prices (US\$/Unit), 2021-2032

Global Automotive-grade NAND Flash Memory market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Million Units), and average selling prices (US\$/Unit), 2021-2032

Global Automotive-grade NAND Flash Memory market shares of main players, shipments in revenue (\$ Million), sales quantity (Million Units), and ASP (US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Automotive-grade NAND Flash Memory

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Automotive-grade NAND Flash Memory market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Micron Technology, Samsung Electronics, Kioxia, Sandisk, SK Hynix, Winbond Electronics, Macronix International, SkyHigh Memory, GigaDevice Semiconductor, Beijing Ingenic Semiconductor, etc.

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

Market Segmentation

Automotive-grade NAND Flash Memory market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Parallel SLC NAND

SPI NAND

eMMC

UFS

Other

Market segment by Functional Use

Code Storage

Data Storage

Application Storage

Other

Market segment by Storage Density

Low Density

Medium Density

High Density

Other

Market segment by Application

Infotainment and Digital Cockpit

ADAS and Autonomous Driving

Telematics and Gateway

Event Data Recording and OTA

Body and Safety Electronics

Other

Major players covered

Micron Technology

Samsung Electronics

Kioxia

Sandisk

SK Hynix

Winbond Electronics

Macronix International

SkyHigh Memory

GigaDevice Semiconductor

Beijing Ingenic Semiconductor

Dosilicon

XTX Technology

Longsys Electronics

Silicon Motion Technology

Phison Electronics

Swissbit

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Automotive-grade NAND Flash Memory product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Automotive-grade NAND Flash Memory, with price, sales quantity, revenue, and global market share of Automotive-grade NAND Flash Memory from 2021 to 2026.

Chapter 3, the Automotive-grade NAND Flash Memory competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Automotive-grade NAND Flash Memory breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Automotive-grade NAND Flash Memory market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Automotive-grade NAND Flash Memory.

Chapter 14 and 15, to describe Automotive-grade NAND Flash Memory sales channel, distributors, customers, research findings and conclusion.

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