

Global Automotive Grade SPI NOR Flash Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Automotive Grade SPI NOR Flash market size was valued at US\$ 490 million in 2025 and is forecast to a readjusted size of US\$ 929 million by 2032 with a CAGR of 9.5% during review period.

Automotive Grade SPI NOR Flash is a type of non-volatile memory specifically designed for automotive electronic systems, using a serial peripheral interface (SPI, including standard SPI, Dual SPI, Quad SPI, and other high-speed variants) to provide reliable long-term storage of critical program code, configuration data, and safety-related information even under power loss or voltage fluctuations. It addresses the key challenges in automotive electronics of deterministic system boot, fast random read access, and high reliability under harsh operating conditions such as extreme temperatures, vibration, electromagnetic interference, and long service life. These devices are widely used in engine control units, body control modules, instrument clusters, infotainment systems, ADAS controllers, and domain controllers. The development history of automotive-grade SPI NOR Flash is closely tied to the evolution of vehicle electrification and software-defined architectures: initially supporting basic control and diagnostic functions in distributed ECU architectures, the technology has evolved to meet the demands of increasing electronic content, larger software stacks, functional safety, and cybersecurity requirements, progressing toward higher capacities, faster read speeds, stronger data protection, stricter quality control, and extended product lifecycles. Upstream in the supply chain, the production relies on high-purity silicon wafers, photoresists, photomasks, specialty gases, and wet chemicals for semiconductor fabrication, as well as packaging substrates, leadframes, bonding materials, molding compounds, and test fixtures. A diverse ecosystem of wafer fabs, packaging and testing providers, reliability validation labs, and quality certification

services collectively ensures the consistency, traceability, and long-term supply stability required by the automotive industry. In 2025, the global production capacity of automotive-grade SPI NOR Flash is projected to reach 200 million units, with total shipments of 187 million units. The average selling price per unit is approximately USD 2.54, and corporate gross margins are expected to range between 25% and 35%.

In the current market landscape, automotive-grade SPI NOR Flash has become an essential memory component in vehicle electronic systems. As vehicles advance toward greater intelligence and software-defined architectures, the demand for reliable storage and fast random read access continues to rise. Beyond traditional applications such as engine control, body electronics, and instrument clusters, emerging systems like domain controllers, gateways, ADAS controllers, and infotainment platforms increasingly rely on high-reliability, low-latency storage, reinforcing NOR Flash's critical role in the automotive supply chain. While alternative storage technologies such as embedded eMMC, UFS, or MRAM have emerged in specific scenarios, NOR Flash maintains dominance in most core applications due to its mature ecosystem, flexible interfaces, and proven stability in safety-critical control units.

Looking ahead, the evolution of automotive-grade SPI NOR Flash will be strongly shaped by changes in vehicle electronic architectures. The proliferation of centralized computing platforms and domain controllers drives the need for higher storage density, faster read speeds, and greater interface bandwidth, making high-speed SPI, Quad/Octal interfaces, multi-channel access, and low-latency random reads design priorities. Over-the-air updates, functional safety, and cybersecurity requirements will further push memory devices to enhance write protection, encryption, and access control. At the ecosystem level, development toolchains, supplier qualification, and full lifecycle management will become crucial competitive differentiators. Meanwhile, the rise of electric and intelligent vehicles may promote heterogeneous storage solutions, on-chip high-reliability memory integration, and tighter SoC-memory co-design, further elevating the role of NOR Flash in automotive systems.

The primary drivers behind this market evolution stem from the automotive industry's strategic shift toward intelligence, software-defined vehicles, and functional safety, transforming reliable storage from a 'sufficient' requirement into a 'must-have' priority. Industry alignment on long-term supply, consistency, and rigorous quality processes encourages ongoing investment in R&D and certification. However, multiple challenges remain: uncertainty from emerging alternative technologies increases investment risk; long and costly high-reliability verification and automotive qualification cycles create barriers for smaller suppliers; extreme environmental requirements drive

up manufacturing and testing costs; and semiconductor shortages, raw material volatility, and global trade uncertainties also impact market stability and growth.

This report is a detailed and comprehensive analysis for global Automotive Grade SPI NOR Flash 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 SPI NOR Flash market size and forecasts, in consumption value (\$ Million), sales quantity (Million Units), and average selling prices (US\$/Unit), 2021-2032

Global Automotive Grade SPI NOR Flash 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 SPI NOR Flash 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 SPI NOR Flash 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 SPI NOR Flash

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 SPI NOR Flash 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 Samsung Electronics, Renesas, ISSI, Infineon?Cypress?, Intel Corporation, Macronix, WINBOND, Ingenic Semiconductor, Micron, GigaDevice, etc.

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

Market Segmentation

Automotive Grade SPI NOR Flash 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

High Capacity

Medium Capacity

Other

Market segment by Interface Type

Standard SPI

Dual SPI

Quad SPI

Octal SPI

Market segment by Voltage

3V

1.8V

Others

Market segment by Application

Commercial Vehicles

Passenger Vehicles

Major players covered

Samsung Electronics

Renesas

ISSI

Infineon?Cypress?

Intel Corporation

Macronix

WINBOND

Ingenic Semiconductor

Micron

GigaDevice

Microchip?SST?

Dosilicon

ESMT

Fudan Microelectronics

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 SPI NOR Flash product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Automotive Grade SPI NOR Flash, with price, sales quantity, revenue, and global market share of Automotive Grade SPI NOR Flash from 2021 to 2026.

Chapter 3, the Automotive Grade SPI NOR Flash competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Automotive Grade SPI NOR Flash 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 SPI NOR Flash 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 SPI NOR Flash.

Chapter 14 and 15, to describe Automotive Grade SPI NOR Flash sales channel, distributors, customers, research findings and conclusion.

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