

Global Memory Companion Chips Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Memory Companion Chips market size is expected to reach \$ 5306 million by 2032, rising at a market growth of 15.4% CAGR during the forecast period (2026-2032).

DDR5 memory interface and module companion chips refer to the semiconductor devices mounted on or closely associated with DDR5 memory modules to enable signal buffering, command/address and clock distribution, power management, serial presence detect storage, thermal monitoring, and sideband control-plane communication. Typical products include RCDs, DBs, MRCDs, MDBs, PMICs, SPD Hubs and temperature sensors for server RDIMMs, LRDIMMs, MRDIMMs and MCRDIMMs, as well as CKDs, PMICs and SPD Hubs for client UDIMMs, SODIMMs, CUDIMMs, CSODIMMs and CAMM2/LPCAMM2 modules. These chips are designed around JEDEC DDR5 requirements and are normally validated by CPU platform vendors, DRAM suppliers and module manufacturers before high-volume deployment.

Based on our research, DDR5 memory interface and module companion chips should be understood as an active module-management chipset market created by the architectural shift from DDR4 to DDR5, rather than as a conventional memory-device market. In DDR5 systems, more power conversion, sideband communication, module identification and thermal management functions are moved onto the memory module. This makes PMICs, SPD Hubs, temperature sensors, RCDs, data buffers and CKDs essential semiconductor components for stable and high-performance memory operation. In server RDIMMs, LRDIMMs and MRDIMM/MCRDIMM architectures, RCDs, DBs, MRCDs and MDBs are critical to signal integrity, capacity scaling and bandwidth expansion. In client systems, AI PCs, high-frequency CUDIMMs and CAMM2/LPCAMM2 modules are increasing the importance of CKDs, PMICs and SPD

Hubs. Therefore, the most appropriate research scope is the DDR5 module-side interface and companion IC market, rather than DRAM, NAND, HBM, complete memory modules or generic power management ICs.

From a supply-side perspective, the industry is small in absolute size but has high technical barriers and a concentrated competitive structure. Core logic devices such as RCDs, DBs, MRCDs and MDBs require deep know-how in JEDEC specifications, CPU platform timing, DRAM characteristics and module-level validation. As a result, the number of qualified suppliers is far smaller than in generic analog or commodity memory markets. Montage Technology, Rambus and Renesas form the core global supplier group, with clear official product evidence across DDR5 server and client memory interface portfolios. The market for PMICs, SPD Hubs and temperature sensors is somewhat broader, with companies such as MPS, Texas Instruments, Samsung, ABLIC, Giantec, Fremont Micro Devices, STMicroelectronics and Microchip participating in selected subsegments. However, their product breadth, validation status and volume scale differ significantly, which is why the industry should be analyzed through a layered supplier framework rather than a simple top-ten list.

Demand growth in 2025-2026 is driven primarily by AI servers, cloud infrastructure, HPC and high-end workstations. AI training and inference clusters are pushing CPU platforms and memory subsystems toward higher capacity, higher bandwidth and tighter power and thermal envelopes. This directly increases demand for higher-generation RCDs, PMICs, SPD Hubs, temperature sensors and data buffer devices. Client-side demand is more closely tied to AI PCs, gaming PCs, high-frequency memory modules and new module form factors such as CUDIMM, CSODIMM and CAMM2/LPCAMM2. Compared with DRAM bit demand and DRAM pricing cycles, companion chip demand is more sensitive to platform transitions, validation cycles and module architecture changes. This gives the market a structural growth profile even though it remains dependent on the broader memory cycle.

From a technology roadmap perspective, the market is moving from first-generation DDR5 support devices toward higher speed, higher current, higher integration and more platform-specific solutions. In servers, the key direction is support for faster and higher-capacity RDIMM, MRDIMM and MCRDIMM configurations, raising the performance requirements for RCD/MRCD, DB/MDB and PMIC products. In clients, high-frequency CUDIMM/CSODIMM and CAMM2/LPCAMM2 adoption increases the value of CKDs, PMICs and SPD Hubs. China's supply chain is also moving from discrete SPD, EEPROM and PMIC products toward a more complete DDR5 memory interface and companion chip portfolio. Because platform qualification is strict and customer

concentration is high, new entrants are unlikely to displace leading suppliers quickly, but opportunities remain in SPD Hubs, PMICs and selected client-side companion chips.

This report studies the global Memory Companion Chips production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Memory Companion Chips 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 Memory Companion Chips that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Memory Companion Chips total production and demand, 2021-2032, (Million Units)

Global Memory Companion Chips total production value, 2021-2032, (USD Million)

Global Memory Companion Chips production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Million Units), (based on production site)

Global Memory Companion Chips consumption by region & country, CAGR, 2021-2032 & (Million Units)

U.S. VS China: Memory Companion Chips domestic production, consumption, key domestic manufacturers and share

Global Memory Companion Chips production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Million Units)

Global Memory Companion Chips production by Product Function, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

Global Memory Companion Chips production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Million Units)

This report profiles key players in the global Memory Companion Chips 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 Montage Technology Co., Ltd., Rambus Inc., Renesas Electronics Corporation, Monolithic Power Systems, Inc., Texas Instruments Incorporated, Samsung Electronics Co., Ltd., ABLIC Inc., Giantec Semiconductor Corporation, Fremont Micro Devices, STMicroelectronics N.V., 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 Memory Companion Chips 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 Product Function, 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 Memory Companion Chips Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Memory Companion Chips Market, Segmentation by Product Function:

Registering / Clock Logic

Data Buffer Logic

Power Management

SPD and Control Hub

Thermal Monitoring

Global Memory Companion Chips Market, Segmentation by Memory Module Type:

RDIMM

LRDIMM

MRDIMM / MCRDIMM

UDIMM / SODIMM

CUDIMM / CSODIMM

CAMM2 / LPCAMM2

Global Memory Companion Chips Market, Segmentation by DDR Generation:

DDR4-related Companion Chips

DDR5 Companion Chips

DDR6 / Next-generation Memory Companion Chips

Global Memory Companion Chips Market, Segmentation by Application:

Server

Computer

Companies Profiled:

Montage Technology Co., Ltd.

Rambus Inc.

Renesas Electronics Corporation

Monolithic Power Systems, Inc.

Texas Instruments Incorporated

Samsung Electronics Co., Ltd.

ABLIC Inc.

Giantec Semiconductor Corporation

Fremont Micro Devices

STMicroelectronics N.V.

Key Questions Answered:

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

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