

Global NAND Flash Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global NAND Flash market size is expected to reach \$ 98120 million by 2032, rising at a market growth of 5.9% CAGR during the forecast period (2026-2032).

NAND Flash is a non-volatile storage technology widely used in solid-state drives (SSDs), USB flash drives, and memory cards. It offers faster read/write speeds, higher storage capacity, and improved power efficiency compared to traditional storage solutions. NAND Flash cells store data in a grid of memory cells, each capable of holding multiple bits of information. Different types of NAND Flash, such as SLC, MLC, TLC, and QLC, vary in terms of their data density, endurance, and cost-effectiveness.

The growth of the NAND Flash market is primarily driven by three factors: the surge in AI and high-performance computing (HPC) demand and data center expansion. As AI servers, large-scale model training, and edge computing advance, the need for high-capacity SSDs (such as QLC/PLC NAND) is skyrocketing, particularly for enterprise storage solutions. Additionally, the recovery of the consumer electronics market (e.g., smartphones with 1TB+ storage, PC upgrade cycles) and the potential release of Windows 12 will further stimulate demand. Meanwhile, rebounding prices are also fueling market recovery. Between 2024 and 2025, NAND manufacturers are improving supply-demand balance through production cuts and technological advancements (e.g., 200+ layer 3D NAND), driving revenue growth.

On the technological front, breakthroughs in 3D NAND layer stacking (e.g., YMTC's mass production of 294-layer NAND, Samsung's shift to TLC/QLC) have become an industry focus, aiming to increase storage density and reduce costs. At the same time, the adoption of QLC/PLC is rising, targeting high-capacity, cost-sensitive applications (e.g., data centers, consumer SSDs). In terms of production capacity, major global

players (Samsung, SK Hynix) are adjusting strategies by phasing out consumer-grade MLC NAND and concentrating resources on high-margin products (e.g., HBM and advanced DRAM), while Chinese manufacturers (e.g., YMTC) are accelerating technological self-sufficiency, potentially reshaping the global supply landscape. Furthermore, geopolitical factors and supply chain localization (e.g., U.S. and EU semiconductor subsidies) will influence 2025's production distribution and competitive dynamics.

This report studies the global NAND Flash production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global NAND Flash total production and demand, 2021-2032, (M GB)

Global NAND Flash total production value, 2021-2032, (USD Million)

Global NAND Flash production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (M GB), (based on production site)

Global NAND Flash consumption by region & country, CAGR, 2021-2032 & (M GB)

U.S. VS China: NAND Flash domestic production, consumption, key domestic manufacturers and share

Global NAND Flash production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (M GB)

Global NAND Flash production by Type, production, value, CAGR, 2021-2032, (USD Million) & (M GB)

Global NAND Flash production by Application, production, value, CAGR, 2021-2032, (USD Million) & (M GB)

This report profiles key players in the global NAND Flash 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 Samsung, SK Group, Kioxia, Micron, WDC, YMTC, 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 NAND Flash market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (M GB) and average price (US\$/GB) 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 NAND Flash Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global NAND Flash Market, Segmentation by Type:

MLC NAND

TLC NAND

SLC NAND

QLC NAND

Global NAND Flash Market, Segmentation by Application:

Mobile

cSSD

eSSD

Others

Companies Profiled:

Samsung

SK Group

Kioxia

Micron

WDC

YMTC

Key Questions Answered:

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

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