

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

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## Abstracts

The global NAND Flash Memory and DRAM market size is expected to reach \$ 257340 million by 2032, rising at a market growth of 5.8% CAGR during the forecast period (2026-2032).

NAND Flash Memory is a type of non-volatile storage technology that retains data without power. It is widely used in SSDs, USB drives, and memory cards due to its high density, cost efficiency, and sequential read/write speed advantages. Unlike DRAM, NAND has limited write endurance but offers persistent storage.

DRAM (Dynamic Random-Access Memory) is a volatile memory technology that provides high-speed data access for active computing tasks. It requires constant power to retain data and is used in system memory (RAM) for CPUs and GPUs. DRAM offers much faster access times than NAND but loses data when powered off.

The NAND Flash market is primarily driven by explosive demand from AI and data centers, where large-scale model training, edge computing, and cloud storage expansion are fueling rapid growth in enterprise-class high-capacity SSDs, particularly QLC and upcoming PLC NAND technologies. Additionally, strong storage upgrade demand in consumer electronics—such as the accelerated adoption of 1TB+ storage in smartphones, the Windows 12-driven PC refresh cycle, and expanded storage needs in gaming consoles—further stimulates NAND demand. Moreover, the 3D NAND layer race (e.g., YMTC's 294-layer production) and the commercialization of PLC technology are significantly reducing per-unit storage costs, pushing the market toward higher density and lower-cost solutions.

On the technology front, QLC/PLC NAND is gaining market share rapidly and is

expected to become the mainstream solution post-2025, while 300+ layer 3D NAND production is accelerating, further optimizing storage density and performance. Market-wise, after hitting bottom in 2024, the NAND market is entering a phase of moderate growth with more stable pricing. However, capacity expansions by Chinese players like YMTC could intensify competition and reshape the global supply landscape. In terms of applications, AI server demand for high-capacity SSDs is growing at over 20% annually, shifting the market structure toward enterprise use, while consumer markets prioritize cost efficiency and capacity upgrades.

The DRAM market is primarily propelled by surging AI computing demand, where HBM (High Bandwidth Memory) has become a standard for GPUs and AI accelerators. The 2025 rollout of HBM3E and HBM4 will significantly enhance DRAM value-add and technical barriers. Concurrently, the DDR5 upgrade cycle is in full swing, with PC and server platforms transitioning to DDR5, delivering over 50% performance gains and expected to exceed 60% penetration by 2025. Major players like Samsung and SK Hynix are strategically reallocating capacity, reducing traditional DRAM supply to focus on high-margin HBM and LPDDR5X products, thereby optimizing supply-demand dynamics.

Technologically, HBM4—slated for 2026—will stack up to 12 layers and exceed 1.5TB/s bandwidth to meet next-gen AI chip demands, while 1? and 1? nm processes will further improve density and power efficiency. Market-wise, DRAM supply constraints in 2024–2025 could drive price hikes of 15–20%, though CXMT's technological catch-up may trigger long-term pricing pressures. In applications, AI server DRAM capacity demand is growing at over 30% annually, while the mobile market will enter a new upgrade cycle with LPDDR6 (2027), making high performance and low power consumption core future priorities.

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

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

### **Highlights and key features of the study**

Global NAND Flash Memory and DRAM total production and demand, 2021-2032, (M

GB)

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

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

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

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

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

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

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

This report profiles key players in the global NAND Flash Memory and DRAM 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 Memory and DRAM 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 Memory and DRAM Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global NAND Flash Memory and DRAM Market, Segmentation by Type:

NAND Flash Memory

DRAM

Global NAND Flash Memory and DRAM Market, Segmentation by Application:

Smartphone

PC

SSD

Severs

Others

Companies Profiled:

Samsung

SK Group

Kioxia

Micron

WDC

YMTC

**Key Questions Answered:**

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

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