

Global Automotive-grade NAND Flash Memory Market Growth 2026-2032

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Abstracts

The global Automotive-grade NAND Flash Memory market size is predicted to grow from US\$ 1741 million in 2025 to US\$ 4254 million in 2032; it is expected to grow at a CAGR of 13.1% from 2026 to 2032.

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.

LP Information, Inc. (LPI) ' newest research report, the “Automotive-grade NAND Flash Memory Industry Forecast” looks at past sales and reviews total world Automotive-grade NAND Flash Memory sales in 2025, providing a comprehensive analysis by region and market sector of projected Automotive-grade NAND Flash Memory sales for 2026 through 2032. With Automotive-grade NAND Flash Memory sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Automotive-grade NAND Flash Memory industry.

This Insight Report provides a comprehensive analysis of the global Automotive-grade NAND Flash Memory landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Automotive-grade NAND Flash Memory portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Automotive-grade NAND Flash Memory market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Automotive-grade NAND Flash Memory and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Automotive-grade NAND Flash Memory.

This report presents a comprehensive overview, market shares, and growth opportunities of Automotive-grade NAND Flash Memory market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Parallel SLC NAND

SPI NAND

eMMC

UFS

Other

Segmentation by Functional Use:

Code Storage

Data Storage

Application Storage

Other

Segmentation by Storage Density:

Low Density

Medium Density

High Density

Other

Segmentation by Application:

Infotainment and Digital Cockpit

ADAS and Autonomous Driving

Telematics and Gateway

Event Data Recording and OTA

Body and Safety Electronics

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

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

Key Questions Addressed in this Report

What is the 10-year outlook for the global Automotive-grade NAND Flash Memory market?

What factors are driving Automotive-grade NAND Flash Memory market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Automotive-grade NAND Flash Memory market opportunities vary by end market size?

How does Automotive-grade NAND Flash Memory break out by Type, by Application?

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