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Global Automotive-grade Non-Volatile Memory Chips Market Growth 2026-2032

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Abstracts

The global Automotive-grade Non-Volatile Memory Chips market size is predicted to grow from US$ 2827 million in 2025 to US$ 6020 million in 2032; it is expected to grow at a CAGR of 11.3% from 2026 to 2032.

Automotive-grade Non-Volatile Memory Chips refer to semiconductor memory devices used in vehicle electronic systems to retain firmware, boot code, configuration parameters, calibration data, log files and security data after power-off. The category mainly covers automotive-grade NOR Flash, NAND Flash, SPI NAND, EEPROM, eMMC, UFS, BGA embedded flash storage, MRAM and FRAM. Key upstream inputs include silicon wafers, photoresists, electronic gases, wet chemicals, sputtering targets, packaging substrates, lead frames, bonding materials, test probes, controller IP, ECC algorithms and automotive-grade reliability qualification services. Major downstream customers include automakers, Tier 1 automotive electronics suppliers, cockpit domain controller makers, ADAS and autonomous driving system suppliers, T-Box and gateway vendors, BMS and powertrain control suppliers, body electronics companies and sensor module manufacturers. Based on factory-gate pricing and a narrow scope covering discrete memory ICs and embedded managed NAND devices, global effective automotive-grade capacity in 2025 is estimated at about 4.8 billion units, shipments at about 3.647 billion units, average selling price at about USD0.79 per unit, and mainstream gross margin at around 34%–46%.

From the current market perspective, automotive-grade non-volatile memory chips have expanded from low-density parameter storage in traditional ECUs to higher-value applications such as digital cockpits, instrument clusters, ADAS, telematics and domain controllers. EEPROM, NOR Flash and small-density SPI NAND remain widely used in body electronics, BMS, camera modules and sensors, where demand is stable and

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qualification cycles are long. At the same time, intelligent cockpits and assisted driving platforms are driving higher adoption of eMMC, UFS and high-capacity NAND-based embedded storage. The market is therefore driven less by vehicle production alone and more by electronic architecture upgrades, software complexity and the growing use of OTA functions.

From the supply-side perspective, the global market is shaped by memory IDMs, specialty non-volatile memory vendors, embedded storage solution providers and emerging local suppliers. Samsung, Micron, Kioxia and Sandisk have strong positions in UFS, eMMC and NAND-based managed storage. Infineon, Macronix, Winbond and GigaDevice are more competitive in automotive NOR Flash, SPI NAND and code storage. Microchip, ST, ROHM, onsemi, Giantec and Puya mainly serve EEPROM and small-density high-reliability memory applications. The core barriers are not limited to wafer fabrication and packaging, but also include AEC-Q100 qualification, PPAP documentation, long-term supply, low failure rates, vehicle platform design-in and functional safety support.

Future technology evolution will follow three major directions. First, high-performance vehicle storage will continue to migrate from eMMC to UFS for intelligent cockpits, integrated cockpit-driving platforms, domain controllers and autonomous driving compute systems. Second, high-performance NOR Flash and SPI NAND will continue to increase density, speed and security features for secure boot, code execution, OTA updates and event logging. Third, EEPROM, MRAM and FRAM will retain long-term demand in power-loss protection, frequent-write, event data recording and configuration storage applications. As automotive platforms become more centralized, memory devices will increasingly compete on interface speed, data integrity, thermal stability, cybersecurity and lifecycle management rather than storage density alone.

Growth momentum mainly comes from higher NEV penetration, richer cockpit configurations, rising ADAS installation rates, software-defined vehicles, OTA update adoption and the automotive industry's focus on supply chain resilience. Key constraints include long automotive qualification cycles, high quality liability, strict platform entry barriers, cyclical memory pricing, NAND supply-demand volatility and price pressure in some low-density EEPROM and NOR products. For new entrants, passing automotive qualification is only the first step; entering Tier 1 and automaker mass-production platforms usually takes several years, making reliability records and long-term customer relationships more important than short-term price competition.

LP Information, Inc. (LPI) ' newest research report, the “Automotive-grade Non-Volatile

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Memory Chips Industry Forecast" looks at past sales and reviews total world Automotive-grade Non-Volatile Memory Chips sales in 2025, providing a comprehensive analysis by region and market sector of projected Automotive-grade Non-Volatile Memory Chips sales for 2026 through 2032. With Automotive-grade Non-Volatile Memory Chips sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Automotive-grade Non-Volatile Memory Chips industry.

This Insight Report provides a comprehensive analysis of the global Automotive-grade Non-Volatile Memory Chips 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 Non-Volatile Memory Chips portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Automotive-grade Non-Volatile Memory Chips market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Automotive-grade Non-Volatile Memory Chips 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 Non-Volatile Memory Chips.

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

Segmentation by Type:

NOR Flash

NAND Flash

Managed NAND Storage

EEPROM

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Other

Segmentation by Interface:

Serial Interface

Parallel Interface

eMMC

Other

Segmentation by Density Range:

Low Density

Medium Density

High Density

Segmentation by Application:

Infotainment and Digital Cockpit

ADAS and Autonomous Driving

Telematics and Gateway

Powertrain and BMS

Body and Safety Electronics

Other

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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

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- 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
- Infineon Technologies
- Winbond Electronics
- Macronix International
- Microchip Technology
- STMicroelectronics
- ROHM
- onsemi

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GigaDevice Semiconductor

Integrated Silicon Solution

Puya Semiconductor

Giantec Semiconductor

Silicon Motion Technology

Phison Electronics

Everspin Technologies

RAMXEED

Key Questions Addressed in this Report

What is the 10-year outlook for the global Automotive-grade Non-Volatile Memory Chips market?

What factors are driving Automotive-grade Non-Volatile Memory Chips market growth, globally and by region?

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

How do Automotive-grade Non-Volatile Memory Chips market opportunities vary by end market size?

How does Automotive-grade Non-Volatile Memory Chips break out by Type, by Application?

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