

Global Memory Companion Chips Market Growth 2026-2032

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Abstracts

The global Memory Companion Chips market size is predicted to grow from US\$ 1614 million in 2025 to US\$ 5302 million in 2032; it is expected to grow at a CAGR of 16.4% from 2026 to 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.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Memory Companion Chips and breaks down the forecast by Product Function, 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 Memory Companion Chips.

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

Segmentation by Product Function:

Registering / Clock Logic

Data Buffer Logic

Power Management

SPD and Control Hub

Thermal Monitoring

Segmentation by Memory Module Type:

RDIMM

LRDIMM

MRDIMM / MCRDIMM

UDIMM / SODIMM

CUDIMM / CSODIMM

CAMM2 / LPCAMM2

Segmentation by DDR Generation:

DDR4-related Companion Chips

DDR5 Companion Chips

DDR6 / Next-generation Memory Companion Chips

Segmentation by Application:

Server

Computer

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.

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 Addressed in this Report

What is the 10-year outlook for the global Memory Companion Chips market?

What factors are driving Memory Companion Chips market growth, globally and by region?

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

How do Memory Companion Chips market opportunities vary by end market size?

How does Memory Companion Chips break out by Product Function, by Application?

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