

North America Defense and Aerospace NAND or NOR Flash Memory Market Size and Forecast (2021 - 2031)

<https://marketpublishers.com/r/N508D8AE00E9EN.html>

Date: April 2026

Pages: 259

Price: US\$ 3,450.00 (Single User License)

ID: N508D8AE00E9EN

Abstracts

The North America Defense and Aerospace NAND and NOR Flash Memory Market is projected to grow significantly, reaching an estimated US\$ 1,096.3 million by 2031, up from US\$ 768.6 million in 2024, reflecting a compound annual growth rate (CAGR) of 5.4% from 2025 to 2031.

Executive Summary and Market Analysis

The growth of the defense and aerospace flash memory market in North America is primarily driven by substantial government investments aimed at modernizing military and aerospace systems. The U.S. Department of Defense (DoD) and NASA are heavily investing in advanced technologies, including satellites and next-generation avionics, which necessitate the use of radiation-hardened (rad-hard) NAND and NOR flash memory. These memory types are specifically designed to endure the extreme conditions of space environments.

In addition, government initiatives to bolster domestic semiconductor production are enhancing the market landscape. The mature research and development ecosystem in the region encourages partnerships between defense contractors and memory manufacturers, leading to the creation of highly reliable and secure memory solutions. The burgeoning commercial space and satellite sectors further amplify the demand for specialized memory technologies, solidifying North America's position as a critical market for defense and aerospace memory solutions.

A notable development occurred on September 6, 2024, when the DoD awarded Honeywell a contract worth US\$25.8 million to produce trusted strategic radiation-hardened microelectronics. This investment is expected to significantly boost the

demand for high-reliability memory devices essential for mission-critical applications in space and defense systems. By leveraging the Defense Production Act Investment (DPAI), the DoD is ensuring a secure domestic supply of microelectronics, which in turn guarantees sustained demand for rad-hard NOR flash for boot code and FPGA configuration, as well as NAND flash for secure data storage. This initiative aligns with the 2024 National Defense Industrial Strategy, which emphasizes the importance of expanding domestic production and enhancing supply chain resilience, thereby stabilizing and growing the market for radiation-hardened flash memory in North America.

Strategic Insights

Market Segmentation Analysis

The North America Defense and Aerospace NAND and NOR Flash Memory Market is segmented by flash memory type, with NAND Flash Memory leading the market in 2024. Further segmentation includes:

NAND Flash Memory Types: SLC, MLC, TLC, and others, with SLC dominating.

NOR Flash Memory Types: Parallel NOR and Serial NOR, with Serial NOR leading.

NAND Flash Memory Architecture: 2D NAND and 3D NAND, with 2D NAND being the most prevalent.

NOR Flash Memory Density: Segmented into various ranges, with the 4 Mb to 64 Mb segment dominating.

NAND Flash Memory Density: Ranging from Up to 2 GB to Above 1 TB, with the 4 GB to 64 GB segment leading.

Market Outlook

The rise of edge computing in military operations is expected to significantly increase the demand for high-capacity NAND and NOR flash memory. Modern tactical systems, such as unmanned vehicles and mobile command centers, rely on local data processing to enhance operational efficiency. This shift reduces latency and conserves bandwidth,

enabling rapid decision-making in critical situations. High-capacity flash storage is essential for managing the vast amounts of real-time data generated by various sensor systems.

NAND flash offers the necessary density and cost-effectiveness for large data storage, while NOR flash ensures reliable firmware execution. As militaries adopt AI-driven analytics for improved situational awareness, the role of flash memory becomes increasingly vital. The ruggedness and longevity of military-grade NAND and NOR flash are crucial for these edge computing applications, as they must operate reliably in harsh environments.

Country Insights

The market is segmented by country, with the United States holding the largest share in 2024. The U.S. defense and aerospace sector is experiencing robust growth, driven by the need for advanced electronics and data storage solutions that guarantee mission-critical performance. Innovations in NAND and NOR flash memory are shaping the market landscape, with companies like Micron Technology Inc. leading the way. On April 8, 2024, Micron announced the launch of its Serial NOR Flash Memory, designed for high performance and reliability across various applications, including defense and aerospace. This advancement is expected to further accelerate market growth and technological innovation in the sector.

Company Profiles

Key players in the North America Defense and Aerospace NAND and NOR Flash Memory Market include Infineon Technologies AG, Renesas Electronics Corp, Microchip Technology Inc, Micron Technology Inc, Samsung Electronics Co Ltd, and others. These companies are employing strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and offer innovative products.

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