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South & Central America Embedded Non-Volatile Memory Market Forecast to 2030 - Regional Analysis - by Product (eFlash, eE2PROM, FRAM, and Others) and Application (Consumer Electronics, Automotive, Robotics, and Others)

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Abstracts

The South & Central America embedded non-volatile memory market was valued at US$ 21.94 million in 2022 and is expected to reach US$ 84.50 million by 2030; it is estimated to grow at a CAGR of 18.4% from 2022-2030.

Increasing Demand in Low-Power IoT Modules Drives South & Central America Embedded Non-Volatile Memory Market

Technological giants worldwide are highly focused on research and development of new technologies. IoT is positioned at the core of the next-gen software technologies in the embedded non-volatile memory market. Embedded non-volatile memory has a wide range of applications in the IoT sector. They are used to collect and store data to help users perform future decision-making activities. An embedded non-volatile memory is capable of supporting low-power IoT modules. The growing shipment of IoT modules is fueling the embedded non-volatile memory market. For instance, in the first quarter of 2023, companies such as Telit Cinterion, Quectel, and Fibocom increased the shipment of low-power NB-IoT and LTE-M (Cat-M) modules. Embedded non-volatile memory supports IoT modules by saving additional space and cost by reducing the need for on- and off-chip to regulate the voltage of the modules. IoT modules are most commonly used in IoT edge or endpoint devices for solving challenges related to ultra-low power operation and shrinking size. IoT modules can connect to the cloud, exchange data packets, and download firmware in batches while operating independently. These modules require high energy and power to perform operations, which increases the

demand for embedded non-volatile memory among users. Furthermore, the growing demand for ultra-low power consumption IoT modules encourages market players to develop new innovative embedded non-volatile memory that requires low power to perform operations. For instance, in June 2022, STMicroelectronics launched the Electrically Erasable Programmable Read-Only Memory (EEPROM) series. The EEPROM series is a new high-density, all-in-one embedded non-volatile memory family that supports embedded systems and tiny IoT modules to operate effectively in low-power energy. The EEPROM series offers several benefits to the user, including efficient data logging, fast upload/download, and ultra-low power for enhancing module efficiency while minimizing power dissipation.

The extensive adoption of IoT is fueling the market growth. For instance, according to the Cisco Visual Networking Index, in 2022, there were more than 28 billion network devices enabled with embedded systems and powered by IoT. The network devices help users improve connectivity and security and reduce additional operational costs for the business. The integration of embedded systems with IoT devices and platforms is enabling new applications and services in areas such as smart homes, smart cities, and industrial IoT. Also, the expansion of smart cities and smart home projects is anticipated to increase the demand for embedded non-volatile memory in IoT-based embedded systems, thereby providing opportunities for the market growth.

South & Central America Embedded Non-Volatile Memory Market Overview

The embedded non-volatile memory market in South & Central America is further segmented into Brazil, Argentina, and the Rest of South & Central America. Mexico and Brazil are the major countries contributing to the highest sales of automobiles in the region. The growing investment in the production of electric vehicles is contributing to the growth of the automotive industry. The rise in demand for electric vehicles equipped with safety features is boosting the manufacturing capabilities of EV manufacturers, further aiding the usage of embedded non-volatile memory in vehicles. Also, the growing investment in automotive manufacturing plants is anticipated to fuel the embedded non-volatile memory market in the coming years. For instance, in January 2022, Great Wall Motor announced its plan to invest US$ 1.9 billion in Brazil's automotive industry over the next decade to manufacture electric and hybrid cars, making it an export hub in Latin America. The integration of various advanced diagnostics and surgical equipment to effectively manage a growing number of illnesses, the rise in disposable income among the masses, and favorable government policies are among the prime factors contributing to the growth of the healthcare sector, which is subsequently boosting the adoption of embedded non-volatile memory chips. In

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addition to the flourishing healthcare sector, the rise in popularity of gaming consoles and the escalating use of advanced technology in production plants would continue to drive the market in South America. The rising development and deployment of IoT solutions is also accelerating market growth. Meanwhile, the adoption of the 5G network across the region is creating a huge opportunity for the market to develop and offer IC packages compatible with 5G connectivity, thereby fueling the growth of the embedded non-volatile memory market.

South & Central America Embedded Non-Volatile Memory Market Revenue and Forecast to 2030 (US$ Million)

South & Central America Embedded Non-Volatile Memory Market Segmentation

The South & Central America embedded non-volatile memory market is segmented based on product, application, and country. Based on product, the South & Central America embedded non-volatile memory market is segmented into eFlash, eE2PROM, FRAM, and others. The eFlash segment held the largest market share in 2022.

In terms of application, the South & Central America embedded non-volatile memory market is categorized into consumer electronics, automotive, robotics, and others. The others segment held the largest market share in 2022.

Based on country, the South & Central America embedded non-volatile memory market is segmented into Brazil, Argentina, and the Rest of South & Central America. Brazil dominated the South & Central America embedded non-volatile memory market share in 2022.

Microchip Technology Inc, Tower Semiconductor, Texas Instruments Inc, Taiwan Semiconductor Manufacturing Co Ltd, Semiconductor Manufacturing International Corp, and Synopsys Inc are some of the leading companies operating in the South & Central America embedded non-volatile memory market.

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