NAND Memory Intelligence Service

Part of the Memory & Storage Service Area Package
Comprehensive examination of NAND flash memory technology, its respective applications, pricing and supply/demand dynamics

“Demand for NAND Flash will continue to be driven from hyperscale datacenter, mobile and 5G technology, HDD replacement with the PC, as well as many new applications coming to the market such as automotive, IoT, AI, and new consumer electronic devices.”

Craig Stice
Research Director
NAND Memory Intelligence Service

Part of the Memory & Storage Service Area Package

HOW OMDIA HELPS YOU

• NAND roadmap and technology transitions
• Detailed picture of the supply landscape
• Comprehensive demand analysis covering key application markets
• Monthly pricing data on dozens of parts
• Competitive rankings of suppliers by geography
• Close integration with DRAM Memory Intelligence Service, SSD & HDD Intelligence Service, and the Mobile & Embedded Intelligence Service, resulting in an all-inclusive understanding of the memory market.

KEY QUESTIONS ADDRESSED

• What is the NAND market forecast in terms of bit growth, ASP, and revenue, both near-term and a look four years ahead?
• What applications are driving NAND bit demand?
• What is the supply/demand environment, and what is the impact to projected ASPs?
• Who are the NAND manufacturers, what are their fab growth plans, and what are the companies’ technology roadmaps?

NAND Industry Revenue

<table>
<thead>
<tr>
<th>Year</th>
<th>Revenue (billions)</th>
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<tbody>
<tr>
<td>2018</td>
<td>$61.0</td>
</tr>
<tr>
<td>2019</td>
<td>$46.1</td>
</tr>
<tr>
<td>2020</td>
<td>$61.9</td>
</tr>
<tr>
<td>2021</td>
<td>$72.8</td>
</tr>
<tr>
<td>2022</td>
<td>$72.0</td>
</tr>
<tr>
<td>2023</td>
<td>$81.5</td>
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<tr>
<td>2024</td>
<td>$89.0</td>
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Source: Omdia

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Memory & Storage: Our Expert Analysts

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NAND Flash: Deliverables

**MARKET TRACKER**
—Quarterly—

- NAND Flash Market Tracker

**MARKET INSIGHTS**
—Monthly—

Studies key market trends, analysis on product, technology and applications, and monthly pricing updates.

**PRESENTATIONS**
—Ongoing—

Scheduled market briefings by request with our lead analysts

**ANALYST ACCESS**
—Ongoing—

For prompt responses to urgent and unique questions.
NAND Memory: Market Data

NAND Market Tracker

Analysis of significant trends and changes in the marketplace with detailed supply/demand analysis and forecasts by application, technology, process, and density; updated quarterly

**DETAILS**

- **Frequency:** Quarterly

**Measures**
- Revenue
- Unit shipment
- Bit shipment
- ASP
- Market shares
- Supply and demand

**Regions**
- Worldwide
- America
- Europe, Middle East & Africa
- Asia Pacific
- China
- Japan

**COVERAGE**

- **Technologies**
  - SLC/MLC/TLC/QLC
  - 3D TLC/QLC
  - Technology generation

- **Application Markets**
  - Enterprise SSD
  - Client SSD
  - Smartphones
  - Tablets
  - Flash storage cards
  - USB flash drive
  - Gaming console
  - Other consumer devices

NAND/ Mobile Memory Dynamics Market Brief

Studies key market trends, analysis on product, technology and applications, and monthly pricing updates.

**DETAILS**

- **Frequency:** Monthly

Updated monthly NAND components, eMMC/UFS and eMCP/uMCP pricing, analysis of current market conditions, key demand and supply dynamics and implications from various end applications.
About Omdia’s Memory & Storage Research

Omdia’s memory and storage team brings years of industry experience, from memory manufacturing, to SSD engineering, and corporate memory business/market intelligence. The team has in-depth knowledge of how the memory markets evolve, the psychologies of what drives the industry, as well as future trends that may impact the markets.

Additionally, the memory and storage team has access to the vast internal resources Omdia has to offer, such as application research and demand, as well as a full suite of semiconductor manufacturing reports and analysis to get a full view on the markets.
Related Content: Semiconductor Service Area Coverage

<table>
<thead>
<tr>
<th>SERVICE AREA PACKAGE</th>
<th>Memory &amp; Storage</th>
<th>Semiconductor Components</th>
<th>Semiconductor Manufacturing</th>
<th>Semiconductor Market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Memory &amp; Storage</td>
<td>DRAM Memory Intelligence Service</td>
<td>Key Mobile Component Price Intelligence Service</td>
<td>Global Semiconductor Manufacturing Market Tracker</td>
<td>China Semiconductor Intelligence Service</td>
</tr>
<tr>
<td>Mobile &amp; Embedded Memory Intelligence Service</td>
<td>LED Intelligence Service</td>
<td>Pure Play Foundry Market Tracker</td>
<td>Design Activity Tool</td>
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<tr>
<td>NAND Memory Intelligence Service</td>
<td>Magnetic Sensors Report - 2019</td>
<td>Semiconductor Silicon Demand Forecast Tool</td>
<td>Industrial Semiconductor Intelligence Service</td>
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<td>MEMS &amp; Sensors for Consumer &amp; Mobile Intelligence Service</td>
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<td>Microcontroller Market Tracker</td>
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<td>Semiconductor Application Forecast AMFT Spotlight Service</td>
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<td></td>
<td>Optoelectronic Components Report - 2020</td>
<td></td>
<td>Semiconductor Competitive Landscape CLT Spotlight Service</td>
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<td>Power Semiconductor Intelligence Service</td>
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<td>Semiconductor Forecast Scenario Tool</td>
<td></td>
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<tr>
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<td>Processors for Graphics &amp; Artificial Intelligence Market Tracker</td>
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[Images of Tom Coate and Kären Dyer]

**Tom Coate**
Customer Success Manager

**Kären Dyer**
Customer Success Manager

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