

# RESEARCH BULLETIN

**DECEMBER 19, 2012**

## Total Flash Memory Market Will Surpass DRAM for First Time in 2012

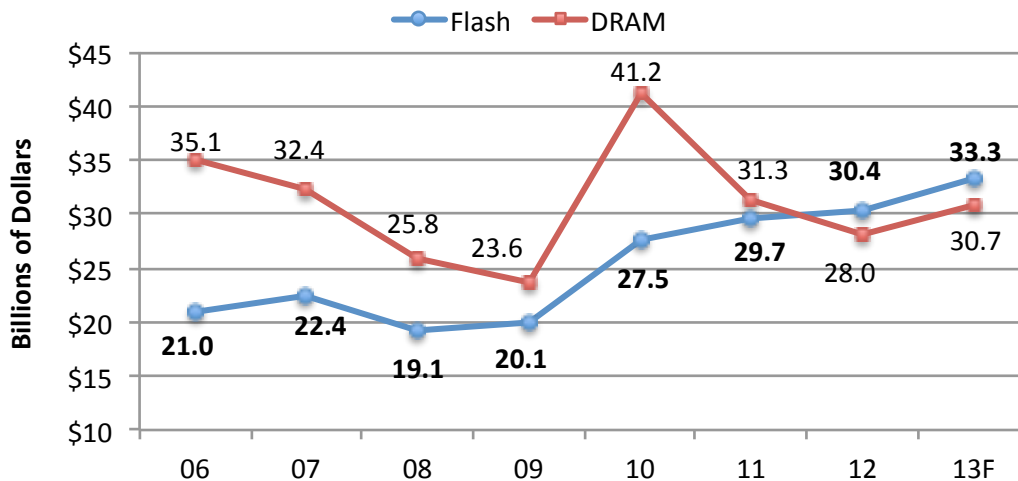
*Boosted by sales of portable media devices, NAND flash sales alone will exceed DRAM in 2013.*

Driven by continued demand for smartphones, tablet PCs, and other personal media devices, the total flash memory market (NAND and NOR) is forecast to grow 2% to \$30.4 billion in 2012, surpassing the \$28.0 billion DRAM market in sales for the first time. With the exception of 2010, the DRAM and flash memory markets have been growing closer in size to each other for several years but demand for flash used in portable media devices, coupled with two years of weaker demand and price erosion for commodity DRAM used in personal computers will finally be enough to push total flash sales beyond those for DRAM this year (see Figure). Among portable media devices, smartphones shipments are projected to finish the year up 55% to 750 million units and shipments of tablet computers are forecast to rise 80% to 117 million units.

### MORE INFORMATION CONTACT

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### Flash Memory Surpasses DRAM Market



Source: IC Insights

Through 2017, the flash memory market is expected to widen its lead over DRAM. In fact, IC Insights forecasts the NAND flash memory market alone will be larger than the DRAM market beginning in 2013. Among more than 30 product segments classified by WSTS, NAND flash is forecast to have the third-highest average annual growth rate through 2017, trailing only the market growth rates for tablet

processors and cellphone application processors. NAND flash sales are forecast to increase 14% annually from 2012-2017, growing to \$53.2 billion at the end of the forecast period while the DRAM market is forecast to grow 9% annually over this same time.

### **Report Details: *The 2013 McClean Report***

A thorough overview and analysis of MOS memory and other IC product segments is just part of the information included in the 2013 edition of IC Insights' flagship report, *The McClean Report—A Complete, Analysis and Forecast of the Integrated Circuit Industry*. The highly regarded annual study features more than 400 tables and graphs in the main report alone. A subscription to *The McClean Report* includes **free** attendance to one of *The McClean Report* seminars held in January, **free** monthly updates from March through November (including a 250+ page *Mid-Year Report*), and **free** access to webinars throughout the year. A single-user subscription to the 2013 edition of *The McClean Report* is priced at \$3,390 and includes an Internet access password. A multi-user worldwide corporate license is available for \$6,390.

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