

# Memory Pricing Intelligence Brief: Market Evolutions & Recent Pricing Analysis

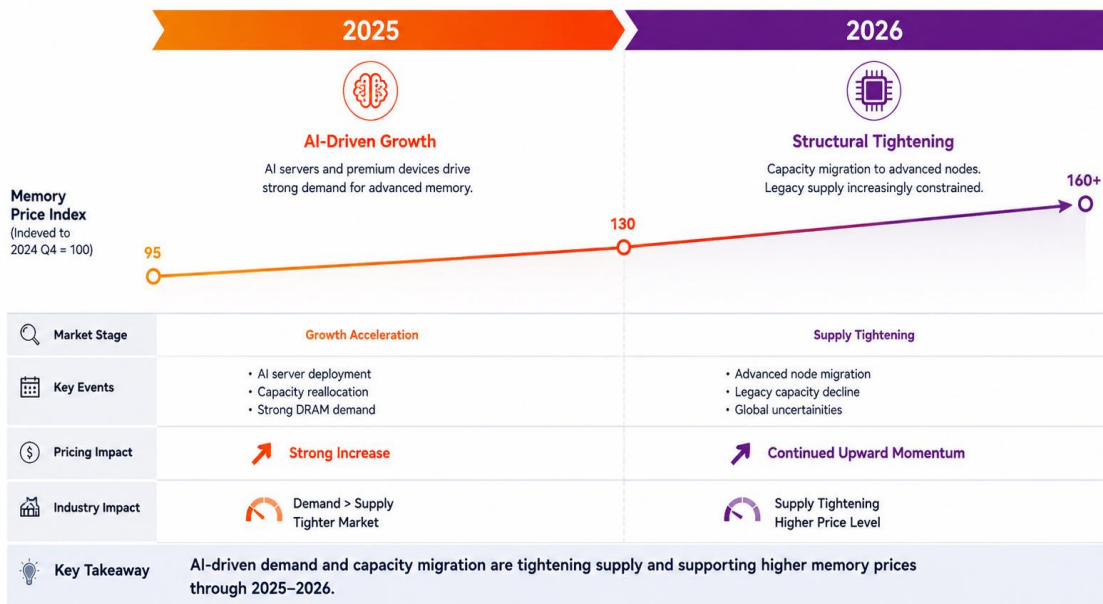
## 1.0 Executive Summary – Memory Pricing Has Shifted from Cyclical to Structural

For decades, memory pricing was largely driven by supply-demand cycles across PCs and smartphones. However, the market has fundamentally changed. Today, pricing is increasingly influenced by capacity allocation decisions, AI infrastructure investment, technology migration, and geopolitical developments, making procurement significantly more complex than in previous cycles.

### 1.1 Memory Market Evolution

#### Memory Market Evolution Timeline (2025–2026)

Key Events, Market Conditions and Pricing Impact



Unlike previous market cycles, today's pricing is increasingly influenced by structural manufacturing decisions rather than temporary demand fluctuations.

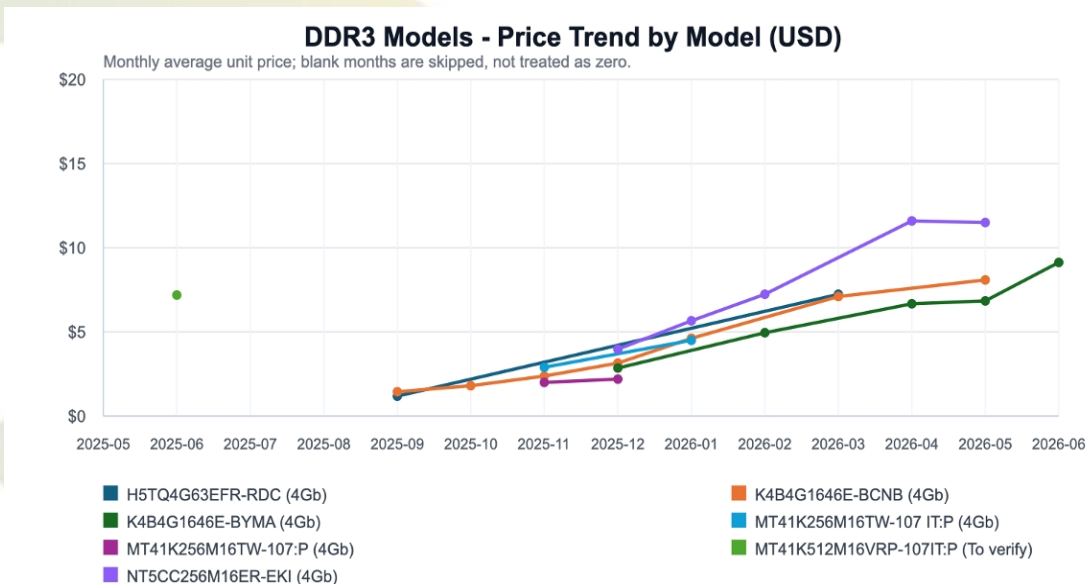
## 1.2 Key Market Developments

<b>Market Development</b>	<b>Industry Update</b>	<b>Business Impact</b>
AI memory demand continues expanding	Micron reported continued strong AI-driven memory demand and HBM growth in its latest earnings update. <i>(Source: Micron Q3 FY2026 Earnings)</i>	AI infrastructure continues supporting advanced DRAM pricing while influencing capacity allocation across the broader memory market.
Capacity migration toward premium memory continues	Samsung and SK Hynix continue expanding HBM production capacity while prioritising next-generation memory technologies. <i>(Source: Samsung Electronics, SK Hynix)</i>	Legacy memory production is expected to remain constrained over the long term.
Production discipline remains in place	Industry reports indicate major memory suppliers continue managing output cautiously following previous oversupply. <i>(Source: Counterpoint Research)</i>	Market pricing is increasingly supported by structural supply management rather than broad consumer demand recovery.

## 2.0 Recent Pricing Trends (2025–2026)

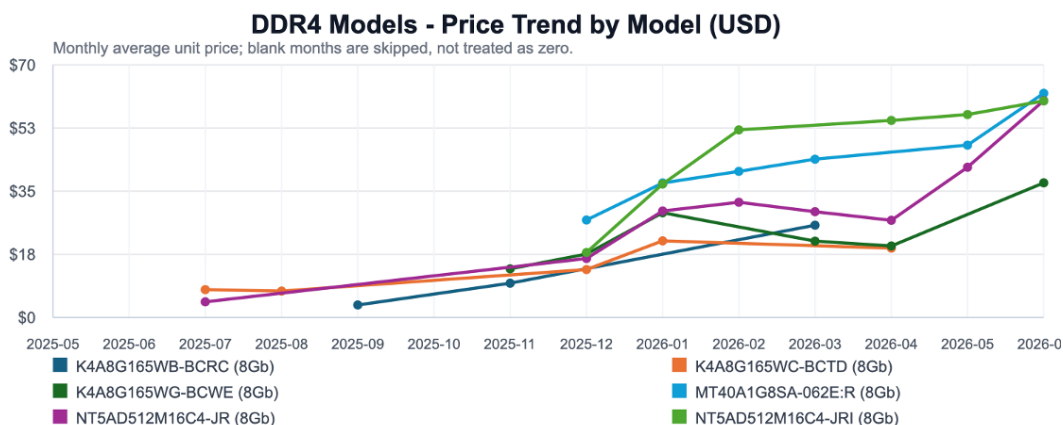
### 2.1 DRAM

#### 2.1.1 DDR3



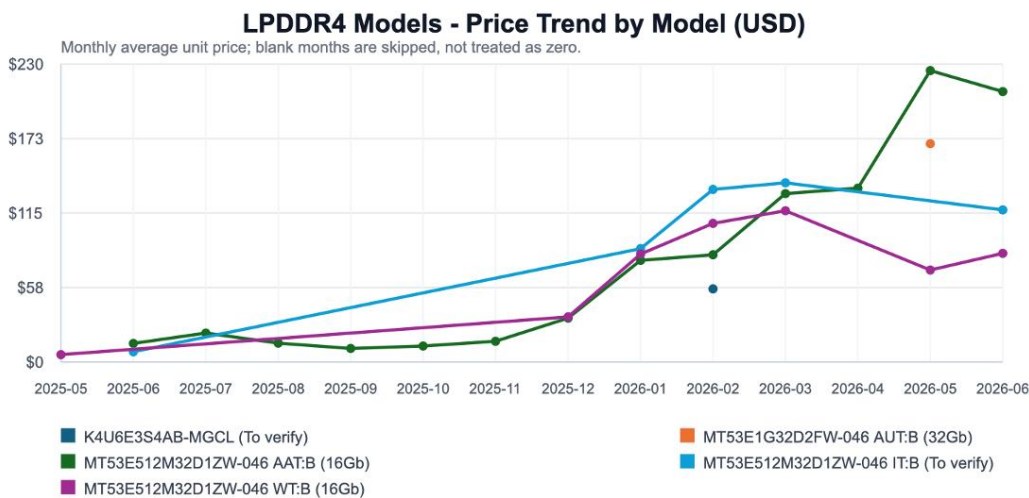
DDR3 prices continued to strengthen across most models as legacy DRAM supply tightened. Capacity shifts toward DDR5 and HBM, together with resilient demand from automotive and industrial applications, remained the primary drivers of the upward pricing trend. Model-to-model variations largely reflect supplier inventory and availability.

## 2.1.2 DDR4



DDR4 pricing maintained a strong upward trajectory across representative models as legacy DRAM supply tightened. Capacity reallocation toward DDR5 and HBM, combined with resilient demand from automotive and industrial applications, remained the key drivers, while price variations reflected supplier inventory and allocation strategies.

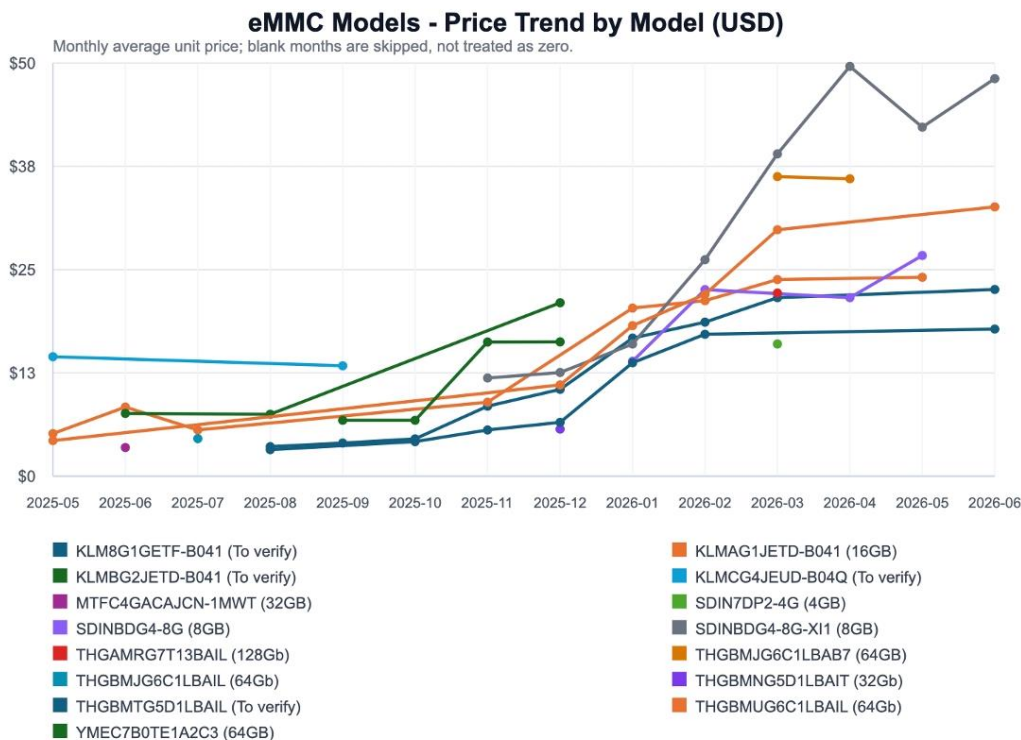
## 2.1.3 LPDDR4



LPDDR4 prices rose sharply across representative models, reflecting tightening supply and strengthening demand for automotive and embedded applications. The trend was primarily driven by manufacturers prioritizing LPDDR5 and other advanced memory technologies, reducing LPDDR4 availability, while continued demand from ADAS (Advanced Driver Assistance Systems), intelligent cockpit and industrial platforms supported further price increases. Differences in pricing movements across models largely reflect supplier allocation, inventory availability and product specifications.

## 2.2 NAND Flash

### 2.2.1 eMMC



eMMC prices continued to strengthen across representative models, with several devices recording significant price appreciation from early 2026. The upward trend was primarily driven by tightening NAND supply, reduced production of legacy managed NAND products as suppliers shifted capacity toward higher-value storage solutions, and resilient demand from automotive, industrial and embedded applications. Differences in pricing movements across models mainly reflect supplier allocation strategies, inventory availability and product capacity.

The next phase of the memory market will be defined less by cyclical demand swings and more by structural supply decisions. Organizations that integrate market intelligence into procurement planning will be better positioned to secure supply, manage cost volatility and support long-term product continuity.

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