

NAND growth ahead

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EDN

Research from **Semiconductor Partners** points to the computing segment as the driver behind NAND-flash memory's expected shipment and gigabyte-consumption growth.

NAND prices were flat to slightly up from March to the end of August, in part due to excitement from the NAND-based iPhone's June debut. Overall 2007 NAND revenues of \$13.5 billion will show an increase of more than 15% from 2006, according to the company. The company further forecasts that 2007 NAND-unit shipments will increase 86% compared with last year, and 2007 gigabyte consumption will grow 217% year over year.

"Computing will grow at an astounding 55.7% CAGR [compound-annual-growth rate] from 2006 to 2011 and will account for nearly two-thirds of the NAND market by 2011," says Adrienne Downey, director of memory research at Semiconductor Partners.

The company expects NAND supply to remain tight in the near term; however, expect manufacturers to add a massive amount of NAND capacity over the next 18 months to help meet demand. The company expects 8 Gbits, the dominant density in 2007, to continue to be a top density through 2009.

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