

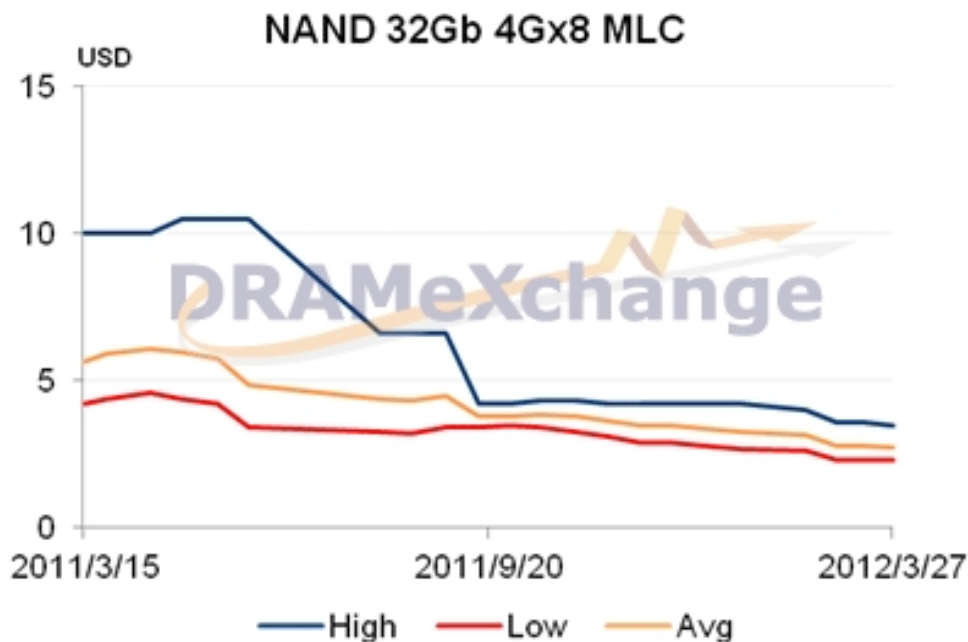
Slow Season Continues for NAND Flash Market

Written by Marco Attard
04 April 2012

DRAMeXchange reports NAND flash memory product demand is still weak, and will remain so through H1 2012 as vendors fail to boost sales through more aggressive pricing strategies.

However the analyst predicts a more optimistic picture for H2 2012 thanks to 3 industry highlights-- ultrabooks, new mobile devices and USB 3.0.

Figure-1 32Gb MLC NAND Flash Contract Price



Source: DRAMeXchange, Mar., 2012

Ultrabooks carrying Intel Ivy Bridge processors should hit the market in H2 2012. DRAMeXchange expects ultrabooks to boost NAND flash consumption due to the use of either hybrid or pure SSD solutions.

Vendors should also be launching new smartphone and tablet models on H2 2012, in order to take advantage of a traditionally strong sales seasons. Smartphones and tablets use around 50% of NAND flash capacity, stimulating demand momentum.

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Finally the USB 3.0 device market will take advantage of PCs carrying Ivy Bridge processors launching during the period-- bringing more consumer recognition of USB 3.0 products. DRAMeXchange predicts USB 3.0 retail prices will decrease "significantly" as controller chip product and flash drive makers migrate to 29nm-class process technology.

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