



TUG News

The Upgrade Group

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DRAM, NAND Prices Jumped in May

Courtesy of [EE Times San Jose, CA](#)

Contract prices for memory, including

DRAM and NAND flash, are expected to rise in May despite the downturn in the segments, according to an analyst.

Contract prices for DRAM could jump up to 10 percent in May, said Daniel Amir, an analysts with Lazard Capital Markets. "NAND contract pricing could increase 10-to-15 percent in May," he said in a report.

In NAND, vendors are seeing a major downturn. But there is some relief, as contact pricing could increase this month.

"Most NAND densities have seen spot prices increase in April for the following reason: 1) Apple repurchasing at Samsung and Toshiba; 2) capacity reduction from Hynix 8-inch fabs in 2Q; and 3) limited supply of 8-Gbit coming out of Samsung 8-inch capacity," he said.

Some companies will see better pricing than others. "We expect Micron to see the biggest contract price increase (15-to-20 percent), while Samsung is likely to see flat pricing (5 percent)," he said.

"NAND supply remains an issue with Hynix. With Hynix reducing its 8-inch NAND capacity, we see the company losing significant market share in the next few months," he said. "We estimate that 70 percent of its capacity is on 8-inch with much of it becoming obsolete by year-end. In addition, our channel checks indicate that the company has begun to transfer wafers from NAND to DRAM where its cost position is better."



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