

DigiTimes: NAND Prices Continue to Slide

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NAND flash prices are set to drop further in Q3 2018, DigiTimes reports-- the result of suppliers scaling their 3D NAND chip output bringing about additional capacity and, ultimately, market oversupply.



According to "industry sources," the more chipmakers scale up output through the transition to more advanced production technologies, the more supply will grow through Q3 2018. Adding to the issue is not-strong-enough NAND demand for such capacity, such as smartphone demand not picking up as fast as expected, and substandard NAND chips leading to confusion in memory prices.

DigiTimes says the continued oversupply will lead NAND flash prices to drop even during H2 2018, with the oversupply becoming "severe" between Q4 2018 and Q1 2019 due to seasonal factors coming into play. NAND suppliers should be hit by high inventory levels from Q3 2018, following an initially optimistic Q1 2018 forecast of flash demand.

As such, the sources warn, all the aforementioned negative factors will lead to a "major reshuffle" of the global NAND flash industry come 2020.

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