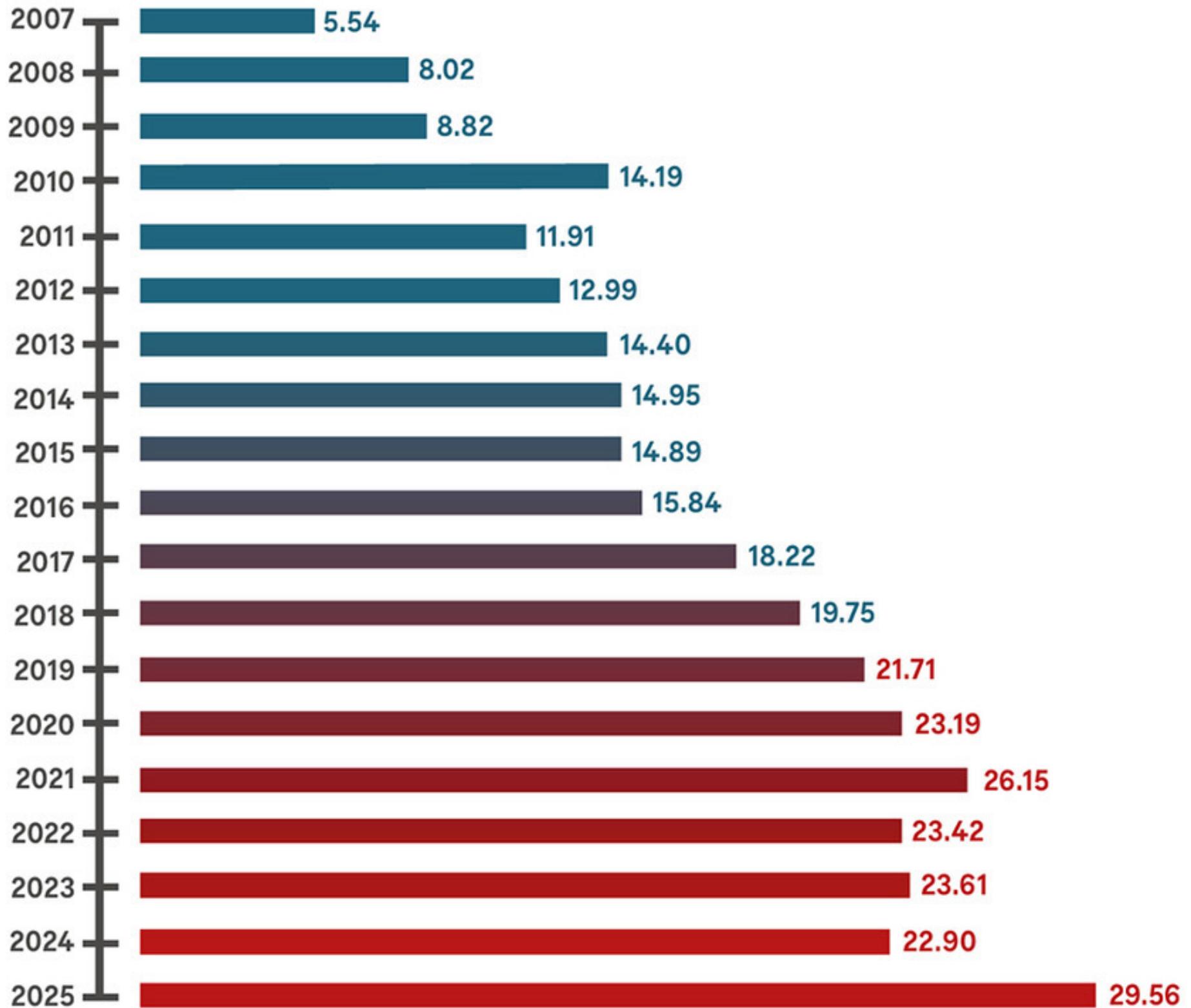


DRAM supply shortage: Opportunity for domestic memory manufacturers

Exports of memory from China (2007-2025) in billion units



Weekly
Facts &
Figures.

- **Supply:** DRAM capacity is diverted to AI, keeping mainstream supply tight.
- **China's opening:** DDR4/LPDDR4 offer the clearest entry points for Chinese DRAM.
- **Tech gap:** Chinese DRAM lags several generations behind Korean and U.S. leaders.

**What
This
Means.**

"As long as AI workloads continue absorbing advanced DRAM capacity and supply growth remains cautious, tightness in mainstream DRAM is likely to persist."



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Start the conversation.



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