

# AI Server Boom to Drive Structural Memory Price Increases in 2026

Topology Research Institute

A clear uptrend is taking shape for 2026, with tighter DRAM supply and broad-based price increases now firmly in sight. The primary growth catalyst is CSPs, which are accelerating data center expansion to support AI workloads. This is not only driving higher global server shipments but also a notable increase in memory content per server.

In the NAND Flash market, enterprise demand will serve as the core growth engine in 2026, while the consumer segment is expected to remain muted until a more visible economic recovery boosts purchasing power and revitalizes demand.

Looking ahead to 2026, continued strength in AI server demand—combined with suppliers' profitability-first strategy—will keep both DRAM and NAND Flash prices on an upward trajectory, reinforcing a structural pricing shift across the memory industry.



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## DRAM Sufficiency Ratios and Price Projection

	4Q25(E)	1Q26(F)	2Q26(F)	3Q26(F)	4Q26(F)
Sufficiency Ratio	-6.1%	-6.9%	-10.5%	-9.2%	-7.3%
Conventional DRAM Price Projection	Up 45~50%	Up 15~20%	Up 5~10%	Up 3~8%	Up 0~5%

Source : TrendForce

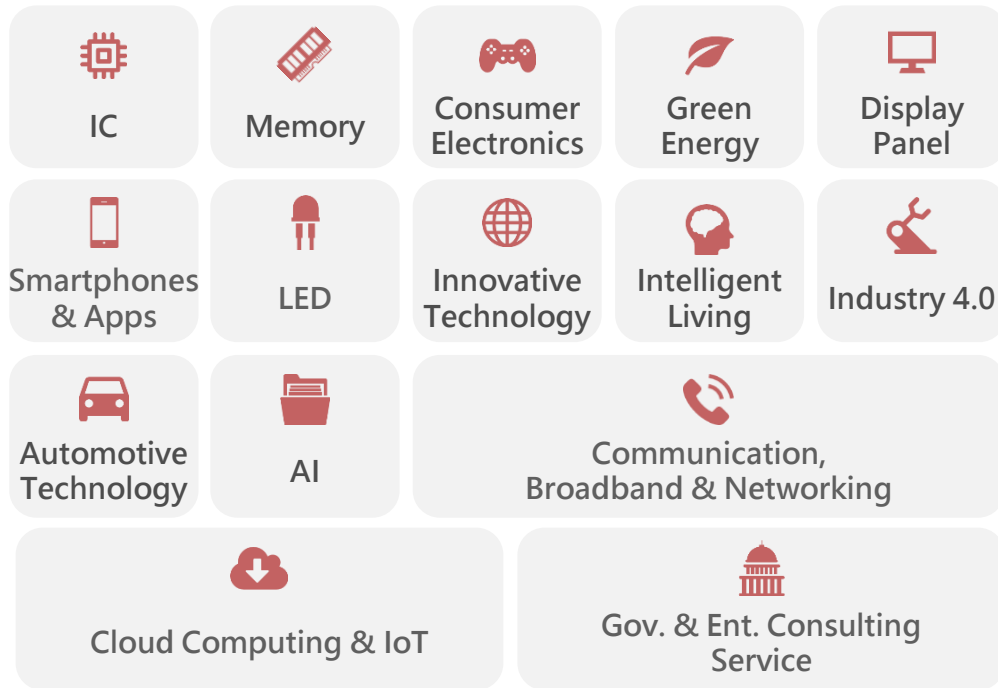
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