

Zava Market Brief

Memory — DRAM & NAND — Q3 Market Brief

Brief ID: MB-2025Q3-MEMORY • Sentiment: Negative • Updated: 2025-08-25 • Region: Global • Demo dataset

Note: Demo dataset for presentation use. Values illustrative.

Executive summary

Memory pricing trends higher on producer discipline and AI-adjacent demand. DRAM spot moves

lead contract resets; NAND contracts lag but drift up. For Zava’s devices, BoM pressure is

moderate but real—optimize densities and avoid unneeded speed bins.

Signals

Signal	Current	WoW Δ	YoY Δ	Confidence
DRAM spot (8Gb, de	\$2.45	+1.8%	+22%	Medium
NAND contract (per	\$46	+0.9%	+12%	Medium
Lead time (modules	10–12 weeks	↔	-3w	Medium

Drivers & risks

- Driver: Capacity prioritized to higher-margin parts; limited spot relief
- Driver: AI server demand tightens certain DRAM grades
- Risk: Sudden ASP jumps on constrained nodes
- Risk: Spec creep in consumer devices inflates BoM without visible benefit

Implications for Zava

- Retail device margins sensitive to density selections
- Promotional bundles should avoid top-bin memory SKUs

Watchlist

- Contract resets at quarter boundaries
- Vendor guidance on wafer starts and utilization

Recommended actions

- Standardize on 2–3 memory options per platform; pre-qualify alternates
- Right-size capacities for actual use; avoid over-spec in entry SKUs
- Negotiate index-based clauses with quarterly caps