

DRAM

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Mobile DRAM Industry Analysis – 4Q19

- ◆ Total smartphone production volume came to 375 million units on the back of the strong sales season in 3Q19, registering a QoQ growth of 9.2%, a stronger growth than that for the same period last year. Although smartphones continued peak-season performance, the total production volume for 4Q19 is forecast to decline slightly QoQ to 368 million units in light of stricter inventory management that brands will be carrying out near the end of the year, bringing the year total to 1.4 billion units, a 4-5% decline YoY.
- ◆ The top six brands ranked by total smartphone production are (starting from the top): Samsung, Huawei, Apple, OPPO, Xiaomi and Vivo, which comprise 78% of global market share combined. For 4Q19, Apple will be leaning on the strength of their new devices and retake second place globally in the quarterly rankings. Huawei, on the other hand, is forecast to move down to third place as it struggles to surpass their sales performance of 3Q19 should the sales ban remain in place.
- ◆ 4Q19 continues to be dragged down by oversupply in the overall DRAM market, with prices continuing to fall albeit to a lesser extent than the previous three quarters: Discrete mobile DRAM prices have fallen by 5-10%, while eMCP/uMCP price declines have narrowed slightly to 3-8% under the influence of halting NAND price declines. Contract prices for 1Q20 are forecast to either trend flat or experience a decline within 5% from 4Q19.
- ◆ Total mobile memory revenue, under the mutually offsetting influences of the fall in ASP and increase in bit shipment units, came to US\$6.764 billion in 3Q19, a mere 1.5% growth QoQ, and could be said to have trended flat. Mobile memory contract prices continued to fall in 4Q19, and with outlooks toward smartphone total production remaining cautious, mobile DRAM revenue is forecast to decline from 3Q19.
- ◆ Looking at process technology, the top three mainstream suppliers have all welcomed the 1Xnm process as their main process of choice for mobile memory. Bit growth will not only depend on the continual increase in 1Xnm process yield rates, but also on the transition into 1Ynm and 1Znm processes. Yet the speed of these transitions may slow considering the unenthusiastic demand in the current market.
- ◆ The outlook for 2020 gives an upcoming upsurge in 5G smartphones: Chinese brands will secure an unshakable position in the 5G smartphone market as China's government actively pushes for the transition into 5G. Globally, 5G smartphones are expected to penetrate at least 15% of the market next year, with China brands taking 60% of that market share.

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