



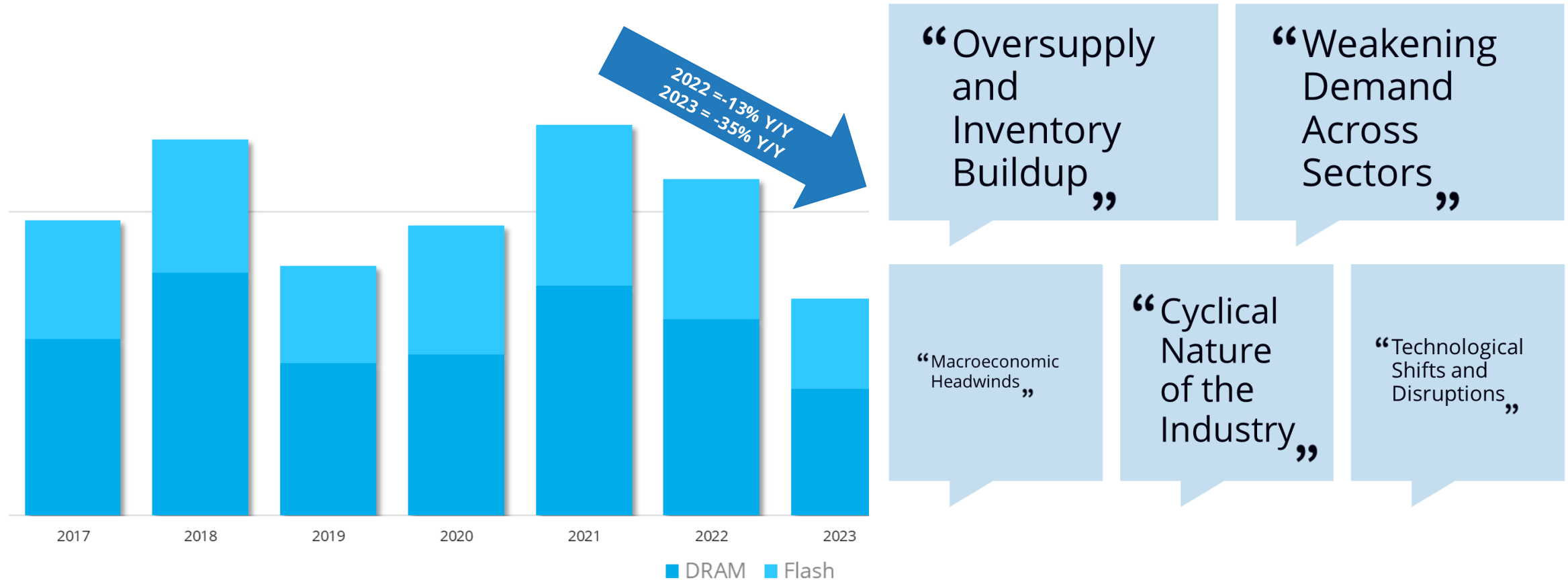
Navigating the Turbulent Storage and Memory Market

Future of Memory and Storage Conference 2024

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Worldwide DRAM and NAND Historical Market Dynamics

Revenue USD



IDC's AI Adoption Model: The Journey

Storage and Memory will benefit as the value of data grows with AI

Experimentation
The GenAI Scramble

Adoption
The AI Pivot

Acceleration
The AI-Fueled Business

2023

2025

2027

Strategy

Hundreds of GenAI use cases identified, dozens of POCs run, few put into production

Enterprise-wide AI strategy with prioritized use case roadmap

Agile AI-infused business transformation

Governance

AI efforts/regulations overwhelm and fragment governance processes, becoming more reactive

Strategic focus on alignment with a multi-stakeholder, unified AI governance model

Proactive AI Governance-by-design enables fast launch of trusted AI services at lower risk

People

Focus on opportunistic employee productivity gains across business and IT functions

Work models include assistants, advisors, and agents as standard staffing approaches

AI-infused business models accelerate workforce transformation programs

Applications

GenAI applied to existing workflows via inclusion in individual business and developer apps

New assisted/agenic processes leveraging AI reshape creation and use of apps

Autonomous processes speed AI enhancement of business functions and apps

AI Platform

Use of disparate and nascent tools and technologies for AI lifecycle strains resources

Unified AI Platform facilitates improved data use, model, and app dev/deployment

AI Platform orchestrates the end-to-end responsible build and deployment of AI apps

Data

Limited ability to identify, quality assure, and integrate data sets inhibits production launches

Data-as-a-Product strategy focused on value-driven shaping of information estate

Value-driven governance of internal and external data sets accelerates new use cases

Infrastructure

Siloed infrastructure platforms and funding models support experimentation but limit integration

Interoperable, fit-for-purpose infrastructure optimizes workload-specific cost and scale

Automated infrastructure ops dynamically match deployment choices to KPIs

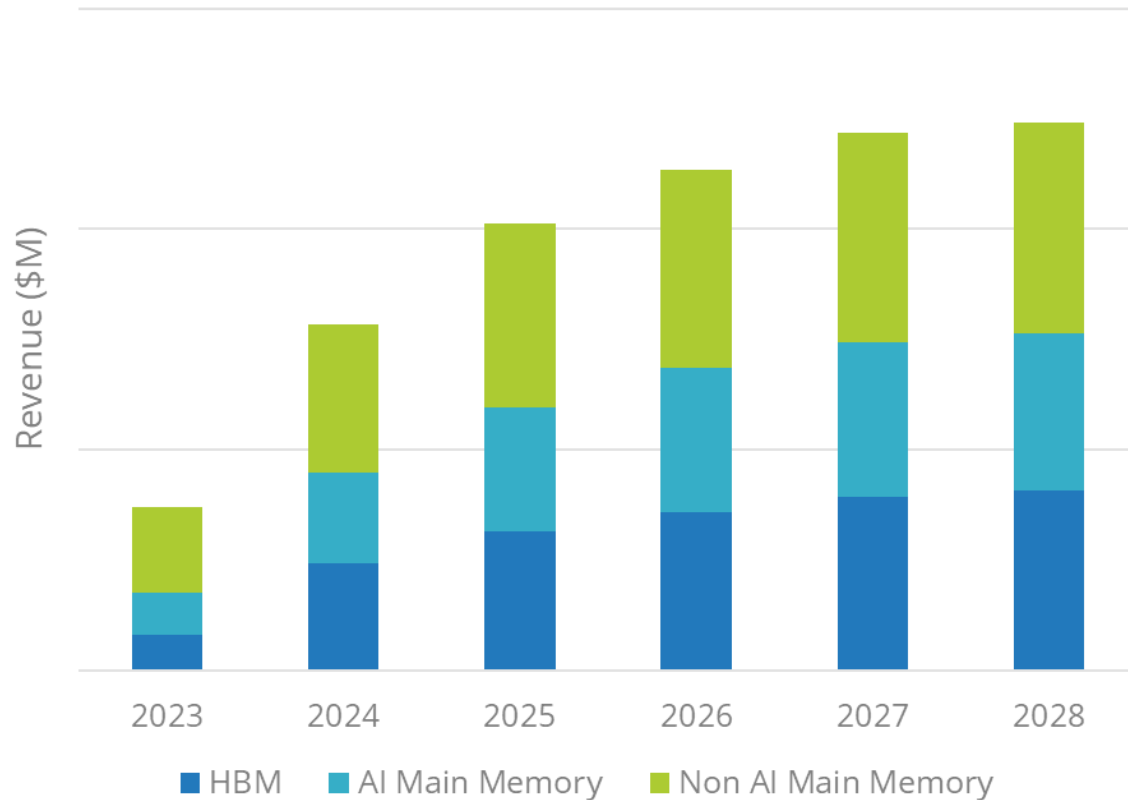
Worldwide Storage and Memory Spending for IT Infrastructure



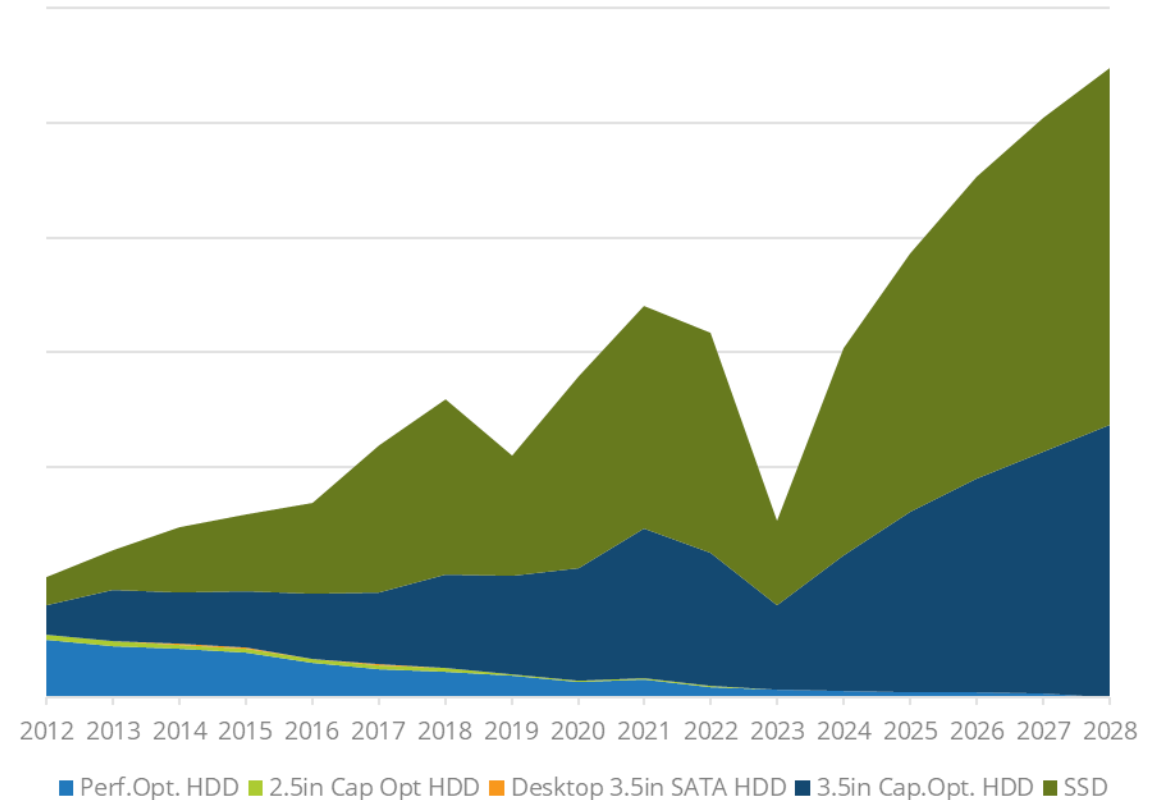
the Future of Memory and Storage

The demand for storage and memory for Enterprise IT Infrastructure continues to expand

Total Enterprise DRAM Revenue Forecast for IT Infrastructure

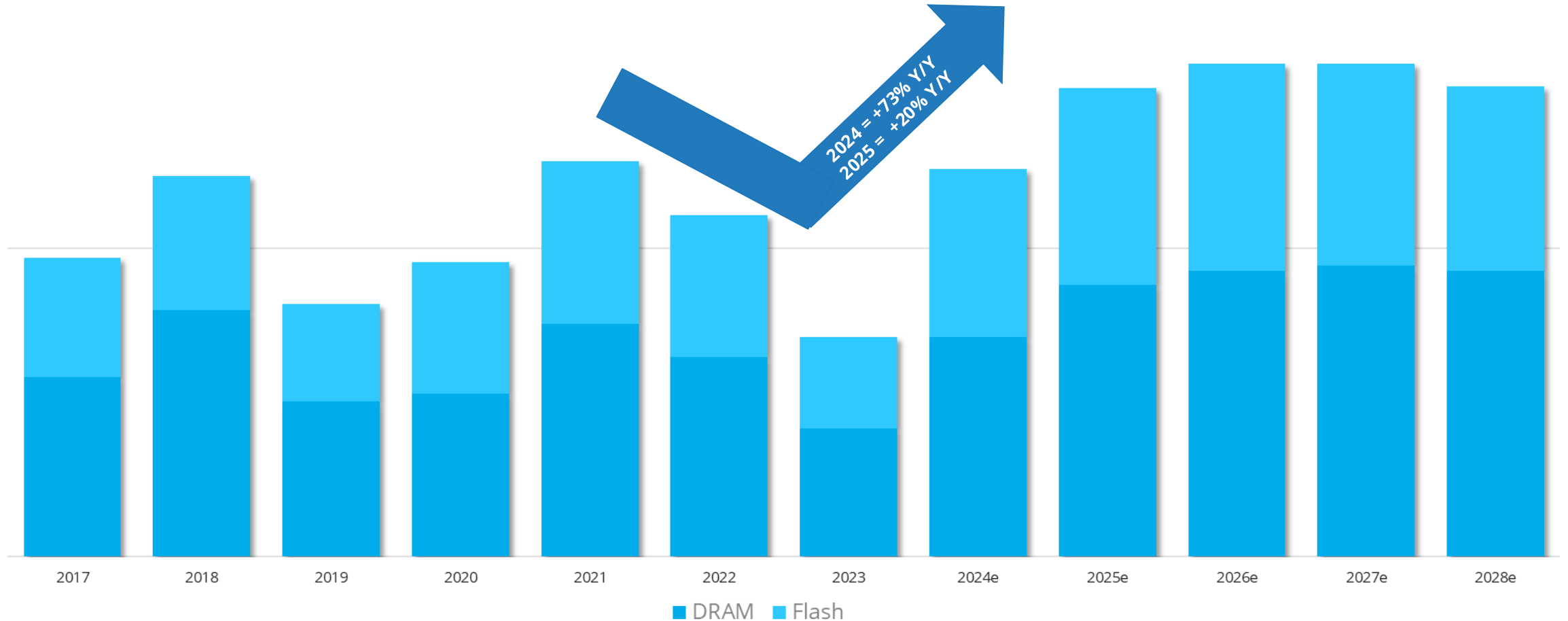


Total Enterprise Storage Device Market Revenue for IT Infrastructure



Worldwide DRAM and NAND Market 5-year Forecast

Revenue USD



Advice for Storage and Memory Industry Participants

1

The industry is now on a path to return to profitability in 2024. Pricing rebounds from unsustainable levels and prices are expected to increase in 2024 partly due to return in bit demand as production adjustments and the normalization of customer inventories.

2

Long-term secular trends remain intact enabling broader adoption of storage and memory. IDC expects that worldwide revenue for DRAM, NAND flash, SSDs, and DRAM are all poised to grow in the near future

3

Suppliers that can adeptly navigate the turbulence of the storage and memory markets by prioritizing an understanding of market demand dynamics, optimizing production supply chains, and developing product portfolios stand to position themselves for further expansion

Sources: Worldwide Hard Disk Drive Forecast, 2024–2028 Doc #US52098524, May 2024

Worldwide Solid State Drive Forecast, 2024–2028 Doc # US50894523, May 2024

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IDC DRAM Update CY1Q24 Update, IDC #US52319624 June 2024



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