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Insight

Global DRAM and HBM Market Share: Quarterly



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March 28, 2026

Summary

Type:

Insight

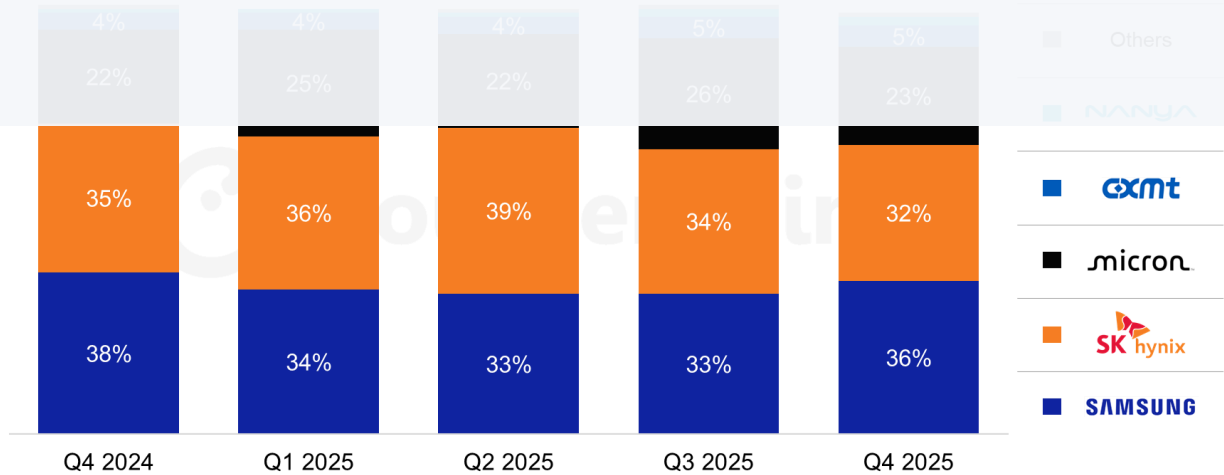
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Netlist EX2073
Samsung v. Netlist
IPR2025-01431

Global DRAM Market Share by Revenue (Q4 2024 – Q4 2025)

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Source: Counterpoint Research Memory Tracker and Forecast

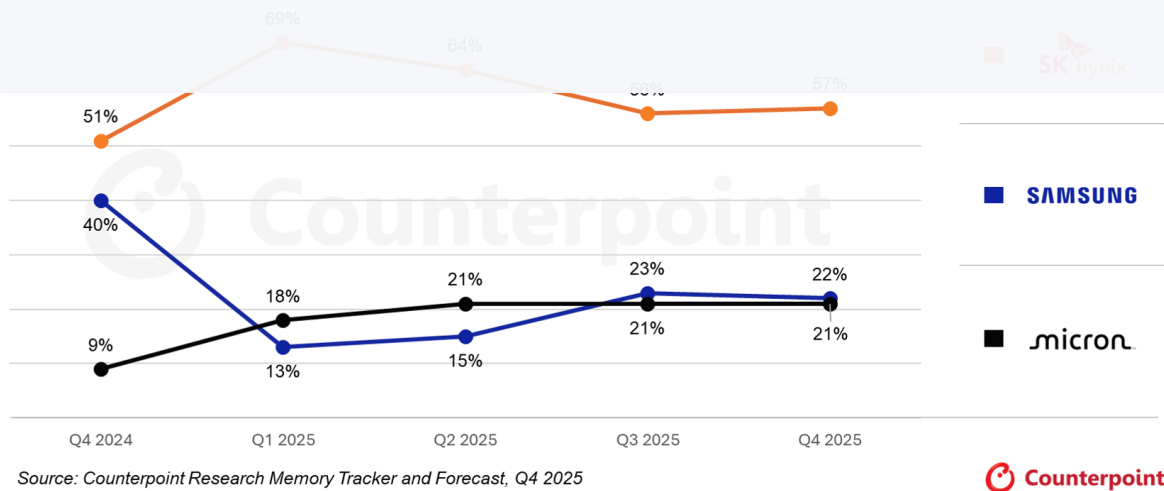
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Market Share	Q4 2024	Q1 2025	Q2 2025	Q3 2025	Q4 2025
Samsung	38%	34%	33%	33%	36%
SK Hynix	35%	36%	39%	34%	32%
Micron	22%	25%	22%	26%	23%
CXMT	4%	4%	4%	5%	5%
Nanya	1%	1%	1%	2%	2%
Others	1%	0%	1%	1%	1%

**Due to rounding, the total may not add up to 100%.*

Market Highlights:

- Samsung reclaimed the No. 1 spot in DRAM revenue in Q4 2025, marking its comeback after one year.
- The DRAM market recorded 30% QoQ growth for two consecutive quarters due to rising memory prices, with a particularly significant price increase in commodity DRAM. In Q4, SK hynix achieved a 58% operating profit margin, exhibiting its maximum profitability.



Market Share	Q4 2024	Q1 2025	Q2 2025	Q3 2025	Q4 2025
SK Hynix	51%	69%	64%	56%	57%
Samsung	40%	13%	15%	23%	22%
Micron	9%	18%	21%	21%	21%

**Due to rounding, the total may not add up to 100%.*

Market Highlights:

- Backed by the strong performance of HBM3E, SK hynix has firmly maintained its No. 1 position.
- HBM4 is expected to be integrated into the NVIDIA Rubin platform, starting with Samsung's shipments in the first quarter of 2026.

The global DRAM market share numbers are from:

Memory Market Tracker and Forecast Insights Report, Q4 2025

Author

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This report provides a comprehensive view of DRAM and NAND Flash market demand and supply trends. It features a unique 5-dimensional tracker that captures data across Brand, Application, and Type — in both bits and revenue terms — offering unparalleled insights into the rapidly evolving dynamics of the memory industry amid the adoption of Gen AI.

Team Counterpoint

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