Apple Clings to Samsung as RAM Prices Soar

Monday December 22, 2025 6:17 am PST by Hartley Charlton

Apple is significantly increasing its reliance on Samsung for iPhone memory as component prices surge, according to *The Korea Economic Daily*.

Apple is said to be expanding the share of iPhone memory it sources from Samsung due to rapidly rising memory prices. The shift is expected to result in Samsung supplying roughly 60% to 70% of the low-power DRAM used in the iPhone 17, compared with a more even split with SK Hynix in previous generations, with Micron also participating as a smaller supplier.

The change is occurring against a backdrop of tightening supply in the global memory market. The iPhone relies on low-power double data rate memory (LPDDR), which is optimized for energy efficiency and thermal performance in mobile devices. While Samsung, SK Hynix, and Micron all manufacture LPDDR at scale, industry sources report that SK Hynix and Micron have increasingly

redirected production capacity toward high-bandwidth memory (HBM), which is in high demand for artificial intelligence accelerators and data center hardware. As a result, their available capacity for mobile-focused LPDDR has become heavily constrained.

By contrast, Samsung has apparently maintained substantial production of general-purpose and mobile DRAM, allowing it to meet Apple's requirement for extremely large and predictable volumes. Samsung is said to be the only company that can meet Apple's conditions in a situation where SK Hynix seems to be focused on HBM.

According to the report, Apple's hardware is particularly sensitive to momentary voltage spikes, which are not well accommodated by its latest chips, including the A19 and A19 Pro. This places additional pressure on memory suppliers to deliver components that perform identically across very large production runs.

The price of a 12GB LPDDR5X module, the likes of which are used in the iPhone Air and iPhone 17 Pro, has risen sharply from around $30 at the beginning of 2025 to roughly $70 today. Apple's scale and long-standing practice of negotiating multi-year supply agreements typically provide some insulation from short-term price volatility, but the magnitude of the increase has made supplier reliability and volume commitments more important. Concentrating a much larger share of orders with Samsung should allow Apple to secure more predictable deliveries and potentially benefit from economies of scale, even as overall component costs rise.

Tag: Samsung

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Apple Says CarPlay Ultra is Coming to These Vehicle Brands

Saturday April 11, 2026 9:14 am PDT by Joe Rossignol

Last year, Apple launched CarPlay Ultra, the long-awaited next-generation version of its CarPlay software system for vehicles. Nearly a year later, CarPlay Ultra is still limited to Aston Martin's latest luxury vehicles, but that should change fairly soon. In May 2025, Apple said…

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Apple Announces 2025 Design Award Winners Ahead of WWDC 2025

Tuesday June 3, 2025 10:14 am PDT by Juli Clover

As we wait for WWDC to kick off next Monday, Apple today announced the winners of its annual Apple Design Awards, recognizing apps and games for their innovation, ingenuity, and technical achievement. The 2025 Apple Design Award winners are listed below, with one app and…

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Apple Recently Launched Two New Headphones

Saturday April 11, 2026 9:07 am PDT by Joe Rossignol

While the AirPods Max 2 received more attention, Apple also released a second pair of headphones last month: Nike Powerbeats Pro 2. Nike Powerbeats Pro 2 are the same as the regular Powerbeats Pro 2, except they have a two-tone design consisting of black and Nike's…

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16 weeks ago

The sooner the AI bubble bursts, the better.

Score: 64 Votes (Like | Disagree)

seek3r
16 weeks ago

Modern “AI” damages everything it touches :/

Score: 45 Votes (Like | Disagree)

WarmWinterHat
16 weeks ago

> *You, uh, havent looked at RAM prices recently, huh? Triple or quadruple those price estimates. Apple’s memory upgrade prices, for like the first time ever, actually are reasonably priced*

Apple's prices aren't suddenly reasonable; the entire market is unreasonable. If you **need** a new computer, buy it now, otherwise sit it out. Try again in a year or two; the bottom will fall out.

The entire AI market can get bent.

Score: 20 Votes (Like | Disagree)

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cateye
16 weeks ago

> *Eventually a company so vertically integrated like Apple will have to build their own fabs. Real men have fabs, like Jerry Sanders used to say. Their reliance on TSMC and Samsung is economically unsound.*

Fabs are eye-wateringly expensive to build and difficult to run. The reason there are so few of them is because they *only* work due to economies of scale—serving the needs of many customers, not just one, and the ability to shift both customers and methods as markets require. Apple owning its own fabs would allow none of this.

Apple's entire structure as a company is based on outsourcing of manufacture. Choosing literally the most fraught and expensive possible thing to in-source is not based in any kind of economic, practical, or business reality.

Score: 16 Votes (Like | Disagree)

WarmWinterHat
16 weeks ago

> *It's crazy but based on what I've seen from Apple over the last few years every major component in their products will be manufactured by them.*
>
> *We're already seeing this with the C1/C1x and N1 chips.*

They are fabed by other companies. Apple doesn't manufacture any of their components.

Score: 16 Votes (Like | Disagree)

AAPLbuyback
16 weeks ago

No company manages supply chain better than Apple.

Score: 12 Votes (Like | Disagree)

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