

Future smartphones may have less RAM due to AI and soaring memory prices.

The escalating cost of memory due to the AI craze could lead to smartphones in 2026 having less RAM, and even becoming more expensive despite having lower specifications than today.

When the price of a smartphone component increases, the most familiar scenario is that the manufacturer will raise the device's selling price. But in a fiercely competitive market, where raising prices isn't always feasible, companies are sometimes forced to compromise by cutting back on specifications.

This is very likely to happen with smartphone models expected to launch in 2026. According to leaked information from Lanzuk (@yeux1122) on Naver, memory prices are rising sharply, and phone manufacturers may have to reduce RAM capacity to continue the price war.

This assessment also aligns with a recent report from market analysis firm TrendForce. According to the report, memory prices are predicted to "rise significantly again in Q1 2026," putting substantial cost pressure on electronics manufacturers worldwide.

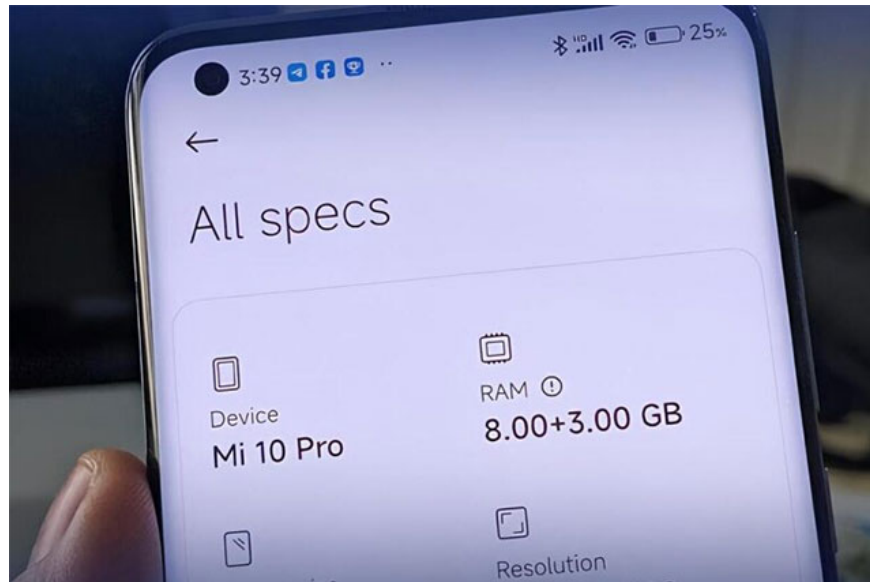
Sources indicate that smartphones equipped with 16GB of RAM may gradually become extinct, while models with only 4GB of RAM are predicted to see a significant increase. Notably, users may even have to pay more for smartphones with lower RAM capacity compared to the current generation.

Specifically, smartphone models with 12GB of RAM may see a 40% price drop and be replaced by 6GB or 8GB versions. Meanwhile, the 8GB RAM segment could see a 50% reduction, making way for models with only 4GB or 6GB of RAM.

Pricing is always a crucial factor for a smartphone brand. Recently, there have been reports suggesting that Samsung may continue using older camera hardware for the Galaxy S26 to counter Apple's "price freeze" strategy on the standard iPhone 17 series.

The root cause of this situation stems from the AI boom in recent years. Large businesses and corporations are rushing to buy high-bandwidth memory (HBM) to power their data centers and AI servers. Meanwhile, memory manufacturers are gradually moving away from the consumer RAM market, as the enterprise segment offers more attractive profit margins.

Current production capacity is insufficient to meet both consumer and enterprise market demands simultaneously. As a result, manufacturers are prioritizing HBM over mainstream DRAM, causing memory prices to skyrocket.



The wave of memory price increases is also spreading to the laptop market. Another report from TrendForce indicates that major PC brands like Dell and Lenovo have begun notifying customers about upcoming price hikes. Dell, in particular, is expected to raise prices by 15–20%, with the adjustment potentially starting as early as mid-December.

Earlier this month, Micron also announced its withdrawal from the consumer market and the closure of its familiar memory and storage brand, Crucial. The escalating memory prices could continue into the second half of 2026, forcing manufacturers to further adjust prices if necessary.

HP CEO Enrique Lores reportedly stated that RAM chips now account for approximately 15–18% of the cost of a typical PC. As memory becomes an increasingly significant component of the bill of materials (BOM), Apple is expected to reconsider its pricing strategy for new models, while also reducing incentives for older models.

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