

# Anticipated Memory and Storage Constraints

## What you need to know

AI-driven demand is reshaping the technology supply chain. Availability of memory and storage components are under unprecedented pressure, creating predictable shortages that will likely impact pricing and availability for at least the next 12–18 months.

### What's Happening

AI adoption is driving demand for DRAM, NAND and hard drives. Hyperscale data centres and enterprise AI deployments are consuming capacity at record levels. Manufacturers are prioritizing supply in tiers: first for data centre and server platforms, then for OEM commercial systems, followed by channel inventory and lastly retail markets.

Some manufacturers have already announced price increases, with more expected throughout 2026.

### Why This Matters

This is a structural shift that will affect multiple markets:

- **Device Market Impact:** Memory shortages will push system-level price hikes of ~3-15% for PCs starting January 2026, with availability pressure making it harder to secure preferred specs.
- **Storage Market Impact:** Prices are rising sharply - potential 25% to 40% increases in some categories - as manufacturers have already committed their entire NAND output for 2026 to large buyers, leaving little flexibility for additional orders. Lead times for enterprise drives may be extended over the next 18-24 months, with no meaningful relief expected before 2027.
- **Server Market Impact:** AI workloads and hyperscale deployments are driving unprecedented demand for server memory and storage. Expect availability pressure and cost increases for critical configurations, making early planning essential.

### What We Expect

**CDW expects a strong likelihood of supply constraints and price increases in memory and storage components for 12–18 months.**

### What You Can Do Now

CDW has secured limited windows to place orders from certain manufacturers before availability pressure intensifies. We recommend customers evaluate near- to mid-term need and act quickly.

- ✓ **Assess your roadmap:** Review 6–12 month budgets and critical needs.
- ✓ **Act early:** Secure inventory before availability limits and price hikes take effect.
- ✓ **Leverage CDW advantage:** Options like Buy and Hold may help lock in supply and pricing.

Our supply chain teams maintain close ties with top partners, giving us visibility into market shifts and enabling proactive planning for our customers.

### Getting Started

Your CDW account manager is your best point of contact for navigating these market pressures. Contact them to discuss:

- Buy and Hold to lock in today's prices
- Assessments of server and storage capacity
- The latest in AI PCs, Macbooks and Chromebooks
- Other market resilience opportunities