

Febrero 6 de 2025

Dear Lenovo Customer,

I hope this message finds you and your teams well.

As we head into the final quarter of 2025, demand across the PC and IT sectors remains strong, particularly fuelled by continued investments in AI-driven infrastructure and advanced computing needs. While this is a positive signal for the industry, it also places increasing strain on global supply chains.

We are seeing sustained upward trends in component costs, particularly for memory (DRAM) and storage (NAND/SSD). This is driven by tight supply, wafer allocation shifts toward higher-value segments, and growing demand from hyperscale and AI applications. These challenges are being experienced industry-wide and are not unique to Lenovo

In response to these market conditions, we will be implementing pricing adjustments across our portfolio, **effective from 1st December 2025**. These changes are necessary to ensure continuity of supply and to maintain the quality and reliability you expect from Lenovo.

Your Lenovo account manager will be in touch to discuss what this means for your current and upcoming orders, and to explore any alternative options that may help mitigate the impact.

We remain committed to supporting your business and will continue to leverage our global manufacturing and logistics capabilities to minimise disruption wherever possible.

Thank you for your continued trust and partnership. We look forward to working closely with you through this period and beyond.

Kind regards,

Lenovo

External Sources:

TrendForce

Memory Makers Reportedly Halt Quotes on Select DRAM, NAND Products as China Faces “Daily Pricing”
With South Korean DRAM giants reportedly hiking prices by up to 30% recently, China’s memory market is feeling intense pressure.

Tom's Hardware

Skyrocketing costs for memory will jack up smartphone prices — Chinese manufacturer Xiaomi warns of higher prices for new devices

The increasing cost of memory chips seems to be slowly creeping into the smartphone industry. Chinese smartphone manufacturer Xiaomi saw a...

Sourceability

Samsung increases DRAM prices after Micron

Samsung plans major price hikes for DRAM and NAND, while Taiwan faces severe labor shortages; both developments could reshape the global...

digitimes

Memory shortage hits 70% order fulfillment; server DRAM prices surge 50%

The memory chip shortage has escalated into a severe crisis as upstream international manufacturers finalize contract prices for the fourth...

TechSpot

DRAM prices soar as hyperscalers pay 50% more for only partial orders

In September, an anonymous source outlined Samsung's plans to raise DRAM and NAND flash prices in the fourth quarter of 2025.