

## Announcement of Phison Electronics' March 2026 Revenue Results

Phison Electronics (8299TT), a leading provider of NAND controllers and NAND storage solutions, today (2026/4/8) announced its operating results for March 2026. Consolidated revenue reached NT\$18.317 billion, representing a 50% month-over-month (MoM) increase and a 221% year-over-year (YoY) growth, setting a new all-time monthly record. Cumulative revenue for the first three months of 2026 totaled NT\$40.967 billion, up 196% YoY, also marking a record high for the same period.

PHISON 8299TT	Sales Revenue	Growth Rate	Remark
March 2026	18.317 (NT\$bn)	50% MoM 221% YoY	Record monthly high
Jan. to Mar. 2026	40.967 (NT\$bn)	80% QoQ 196% YoY	Record-high for the same period

K.S. Pua, CEO of Phison Electronics, stated, "Phison's business momentum continues to benefit from the rapid expansion of AI applications, driving a 25% year-over-year increase in PCIe SSD controller shipments. At the same time, NAND bit shipments (bit growth) recorded a solid 18% month-over-month increase, reflecting sustained demand for high-performance and high-capacity storage solutions. As AI deployment and inference applications accelerate, data generation is growing structurally and almost without limit, further fueling strong demand for NAND storage. However, on the supply side, NAND manufacturers remain cautious regarding capacity expansion, keeping supply tight. As a result, NAND pricing continues to trend upward, with no clear signs of easing in the near term."

K.S. Pua further explained, "While there have been some recent market discussions about softening memory prices, these are primarily driven by short-term supply-demand fluctuations in the retail market. In contrast, Phison's long-term focus on high-value customized segments—including CSPs, servers, AI applications, and industrial markets—operates under system design-in business models, contributing more than 70% of Phison's total revenue. In these segments, Phison's NAND storage solutions are critical components within customers' system architectures. Demand remains strong and stable (significantly different from the short-term trading nature of the retail market,) and continues to support improvements in the Phison's overall gross margin and profitability structure."

In closing, K.S. Pua addressed, "With the rapid growth of 'AI Claw' (AI agent) applications, Phison has introduced the world's first aiDAPTIV Hybrid Claw and aiDAPTIV Hybrid AI SSD solutions. These innovations not only address users' data security concerns but also reduce token costs by more than 70%. Since launch, the solutions have received strong market attention and driven continued customer orders, and are expected to contribute positively to aiDAPTIV-related revenue. Looking ahead to 2026, AI development is shifting from model training to large-scale inference applications. The massive data generated will continue to drive NAND storage demand. Leveraging its deep presence in servers, data centers, and AI deployment applications, Phison is well-positioned to capture growth opportunities and further expand revenue and profitability from high-value-added products."

Phison Announcement  
April 8<sup>th</sup> 2026



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## **[PHISON's Quick Facts]**

- Over 25 years experiences in NAND controller IC design and module integration.
- Over 4,500 employees globally, and more than 70% are engineers
- More than 2,000 NAND-related patents globally.
- Target long-term revenue of NT\$100 billion through the 5+5 growth strategy
- The global market share of SSD controllers exceeds 20%
- The global market share of automotive-grade controllers exceeds 40%
- Phison, along with NAND makers such as KIOXIA, Micron, SanDisk, Samsung, SK Hynix, and others, are long-term partners.
- Over 70% of Phison's revenue contribution comes from "non-consumer" NAND storage applications, including servers, automotive systems, embedded systems, industrial applications, gaming consoles, and generative AI, allowing Phison to maintain relatively stable revenue and profitability despite fluctuations in the NAND industry.
- Phison's mastery of the entire NAND industry ecosystem, including its relationships with upstream NAND makers, supply chain partners for NAND controllers and storage modules, and downstream NAND storage application customers, represents invaluable and irreplaceable value that Phison brings to its global clients and partners. It is also a key advantage that enables Phison to stand firm in the NAND industry.

## **[About PHISON]**

Phison Electronics Corp. (TPEX:8299) is a global leader in NAND Flash controller IC and storage solutions. We provide a variety of services from controller design, system integration, IP licensing to total turnkey solutions, covering applications across SSD (PCIe/SATA/PATA), eMMC, UFS, SD and USB interfaces, reaching out to consumer, industrial and enterprise markets. As an active member of industry associations, Phison is on the Board of Directors for SDA, ONFI, UFSA and a contributor for JEDEC, PCI-SIG, MIPI, NVMe and IEEE-SA.

To know more about Phison, please visit [Phison Website](#) or [Phison Q&A](#) for details.

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## **[Forward-looking Statements]**

Information included in this press release that are not historical in nature are "forward-looking statements". Phison cautions readers that forward-looking statements are based on Phison's reasonable knowledge and current expectations, and are subject to various risks and uncertainties. Actual results may differ materially from those contained in such forward-looking statements for a variety of reasons including without limitation, risks associated with demand and supply change, manufacturing and supply capacity, design-win, time to market, market competition, industrial cyclicality, customer's financial condition, exchange rate fluctuation, legal actions, amendments of the laws and regulations, global economy change, natural disasters, and other unexpected events which may disrupt Phison's business and operations. Accordingly, readers should not place reliance on any forward-looking statements. Except as required by law, Phison undertakes no obligation to update any forward-looking statement, whether as a result of new information, future events, or otherwise.