

# THE INFRASTRUCTURE SUPPLY CRISIS

NAND, DRAM & HDD shortages are reshaping enterprise IT through 2028. AI hyperscalers have captured the supply chain — and your refresh cycle is caught in the crossfire.

<h2 style="font-size: 2em; margin: 0;">2x</h2> <p><b>MEMORY PRICE SURGE</b> In just a few months — NAND, DRAM, &amp; HDD all affected <small>IDC, Feb 2026</small></p>	<h2 style="font-size: 2em; margin: 0;">2028</h2> <p><b>NO RELIEF UNTIL...</b> Intel CEO Lip-Bu Tan — shortage persists through 2028 <small>Bloomberg, Feb 2026</small></p>	<h2 style="font-size: 2em; margin: 0;">\$600B+</h2> <p><b>HYPERSCALER AI SPEND</b> AWS, Google, Meta, Microsoft 2026 capex — crowding out enterprise <small>Investor calls, 2026</small></p>	<h2 style="font-size: 2em; margin: 0;">100%</h2> <p><b>HDD OUTPUT SOLD OUT</b> Seagate &amp; WD: full calendar 2026 production committed <small>Earnings calls, Feb 2026</small></p>
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## WHY IT PERSISTS

### DIRECT FROM THE ANALYSTS

"We are seeing shortages of memory, storage and even CPU silicon and all of these will be dynamically affecting each other for some significant time based on announced capex spend and datacenter land leases."  
— Andrew Buss, IDC Senior Research Director · The Register, Feb 20, 2026

"No meaningful open production remains for discretionary buyers except the hyperscalers... HDD manufacturing capacity is now almost exclusively prioritized for large AI/cloud players."  
— Sid Nag, Tekonyx President & Chief Research Officer · The Register, Feb 20, 2026

### SUPPLY CONSTRAINT OUTLOOK · 2026 → 2028

<b>Q1-Q2 2026</b> Crisis Peak	<b>H2 2026</b> Still Tight	<b>2027</b> Improving	<b>2028</b> Gradual Relief
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**⚠️ Intel CEO expects memory shortages to last until 2028. HPE has cut quote validity from 30 to 14 days. Cisco can now cancel orders up to 45 days before ship date and adjust pricing mid-order.**

 <p><b>NAND &amp; DRAM</b> Prices nearly doubled; AI servers consuming all available output</p>	 <p><b>Hard Drives</b> Seagate &amp; WD 100% sold out through calendar 2026</p>	 <p><b>Server CPUs</b> CPU silicon joins shortage; server OEM lead times extending rapidly</p>
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## YOUR STRATEGIC OPTIONS

## FIVE PATHS FORWARD

### 01 Cloud Bursting

**AWS** **AZURE** **GOOGLE CLOUD** **11:11 SYSTEMS**

Extend on-prem workloads to public or managed cloud. No hardware procurement needed. Ideal for dev/test, batch analytics & variable demand — hyperscalers are immune to the shortage.

**Days** **Low** **\$\$**  
TIME TO VALUE RISK COST

### 02 OEM Cloud Extensions

**NUTANIX NC2** **VMWARE CLOUD AWS** **AZURE VMWARE SERVICE**

Run the same management plane across on-prem & cloud. Extend capacity without retraining staff or retooling operations. Delay refresh cycles until supply normalizes.

**Weeks** **Medium** **\$\$\$**  
TIME TO VALUE RISK COST

### 03 Scale-Out with Smaller DIMMs

**16-64GB DIMMS** **NUTANIX HCI** **VSAN**

More nodes with smaller, available memory instead of fewer nodes with scarce large DIMMs. Works best with HCI platforms built for horizontal scale. Trades CapEx for procurement flexibility.

**Weeks** **Low** **\$\$**  
TIME TO VALUE RISK COST

### 04 3rd-Party & Gray Market

**CERTIFIED REFURBISHERS** **TPM PROVIDERS**

Secondary market for certified enterprise components. Vendor-vetting and provenance documentation are essential. Best for non-critical workloads as a bridge solution while primary supply recovers.

**Variable** **Medium** **\$-\$\$**  
TIME TO VALUE RISK COST

### 05 Resource Right-Sizing — Do This First

**IBM TURBONOMIC** **NUTANIX CLOUD MANAGER**  
**VMWARE ARIA OPERATIONS**

The fastest, cheapest path to more capacity: reclaim what you already own. AI-driven analysis right-sizes VMs & containers based on actual utilization. Most enterprise environments carry **30-50% waste** — recoverable immediately.

**Immediate** **Very Low** **\$**  
TIME TO VALUE RISK COST



*IT Transformation. Simplified.*

### We Understand Your Challenge — And We Have a Plan

Our team has hands-on expertise across all five options. We'll assess your environment, model the scenarios, and build a phased strategy matched to your specific situation. The time to plan is now — before options narrow further.

**REQUEST YOUR FREE ASSESSMENT**  
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