

TRENDFOCUS' analysts have more practical data storage industry experience than any other research firm.

Mark Geenen is the founder and president of TRENDFOCUS. Mr. Geenen brings extensive skill and knowledge of the data storage industry including 30 years researching and consulting in the HDD, SSD, component, and storage industry markets. He has presented at numerous conferences worldwide, is frequently cited in industry and business press, and has authored several articles. Mr. Geenen is a long-time member of the Global Board of Directors of IDEMA, the trade association for the data storage industry, and is a Founder and Executive Council member of the Advanced Storage Technology.

John Chen, Vice President, directs TRENDFOCUS' Cloud, Hyperscale, & Enterprise Storage Service and our client end market demand modeling. His experience in the data storage industry spans more than 25 years. With engineering degrees from both U.C. Davis and U.C. Berkeley, Mr. Chen was deeply involved in magnetic media and sputter process development throughout the 1990s, followed by years of senior managerial experience in program management and technical sales at Komag. He also served in an enterprise commodity management role at NetApp and has provided key technical input in various M&A and intellectual property marketing activities.

Don Jeanette, Vice President, leads our NAND/SSD activities and contributes to our Cloud, Hyperscale, & Enterprise and HDD services. Prior to joining TRENDFOCUS, Don was Toshiba's Sr. Director of Marketing, responsible for storage products marketing, strategy and new business development for Toshiba's SSDs and HDDs in the U.S. His background includes 18 years in marketing, roadmap alignment, and product planning and management supporting OEM, data center, and distribution sales clients. In addition, Mr. Jeanette has worked in various marketing and business development roles at Marvell, Infoseek, and Fujitsu. Don received a Bachelor's Degree from Central Connecticut State University and an MBA from San Jose State University. Don has also taught Management, Communication, and Ethics courses at the University of Phoenix.

John Kim, Vice President, heads TRENDFOCUS' analyses on HDDs, components, and demand interconnects for enterprise, personal computing, CE, and external storage markets. Mr. Kim has over 25 years of HDD industry experience, including 18 years with TRENDFOCUS. He was Director of Sales and Marketing for Kobe Precision and, prior to that, held a top marketing role at Microscience International. Mr. Kim's experience in Asian markets anchors the company's profound exposure in that region.

Tim Luehmann, Office Manager, is the primary administrator and operations manager for TRENDFOCUS. Tim has expertise in consumer electronics and gaming technologies, as well as IT infrastructure and end-user market trends. Tim is responsible for the day to day operations at TRENDFOCUS including collecting stories for the Daily News Letter, website administration, maintenance of TRENDFOCUS documents and databases, and the processing of custom data sets for clients.

TRENDFOCUS

The Data Storage Industry's
Most Trusted Market Intelligence

HDDs, NAND and SSDs

Cloud, Hyperscale, Enterprise,
and Client Markets

Technology and the Storage Supply Chain

TRENDFOCUS

20370 Town Center Lane
Suite 240
Cupertino, CA 95014
Tel: 408.996.9903 Fax: 408.996.9910
Email: info@trendfocus.com

www.trendfocus.com

The Data Storage Industry's Most Trusted Market Intelligence

TRENDFOCUS blends “top down/bottom up” and 360° statistical analysis providing our clients with the exacting data set needed to make complex decisions in today's environment.

Delivered with agile customer support, our research deliverables include:

- ▶ Quantitative supply/demand trend analyses: production plans vs. demand, shipments, market shares, pricing, and technology transitions
- ▶ Storage demand interlinks into the wider computing/IT ecosystem
- ▶ Competitive analysis and risk assessment
- ▶ Capital investments and trends

Research Expertise In:

Storage Market Segments & Demand Interlinks to

Cloud, Hyperscale, and Enterprise Storage
PCs, Tablets, Convertibles, Smartphones, Consumer Electronics

HDD, NAND and SSD

Demand Drivers, Technology Interconnects

Key Components

Equipment and Materials

Supply Chain Risk, Capital Investment Assessment

FEATURED IN 2016

Cloud, Hyperscale, & Enterprise Storage Service

Advanced analysis on SSD workloads, PCIe growth and more.

- ▶ New data and forecasts covering PCIe growth by form factor, inflections in pricing, and unit growth trends due to the increasing adoption of devices tuned for particular workloads.
- ▶ Updated long-term forecasts adjusting to the changing usage landscape of enterprise HDDs and SSDs.
- ▶ Detailed analyses on storage capacity boosting technologies including the impact of SMR on Enterprise Storage.

NAND/SSD Service

NAND supply modeling, SSDs in PCs, 3D NAND, and more.

- ▶ Deeper coverage and analysis of the transitions of SSDs into client PCs, including updated views on NVMe PCIe and module type form factor SSD adoption.
- ▶ Increased coverage forecasting bit output and demand plus details on the transition to newer NAND technologies, including 3D NAND.
- ▶ New data and forecasts on eMMC.

Storage Interlinks and SDAS (HDD) Service

- ▶ Detailed analyses on storage capacity boosting technologies including the impact of SMR on PCs.
- ▶ New Chromebook analysis and data.

TRENDFOCUS INFORMATION SERVICES

Cloud, Hyperscale, & Enterprise Storage Service

This service analyzes hyperscale/ODM-direct/commodity hardware and traditional OEM demand for HDDs and SSDs. Included are HDD forecasts by nearline, workload-limited, and archive/cold models; SSD forecasts by SATA, SAS, PCIe; \$/GB, exabyte and revenue forecasts by HDD and SSD type; and the resulting impact on the storage supply chain.

Storage Interlinks Service

An integrated report included in the SDAS: HDD Information Service, this expanded coverage analyzes the critical interconnections of the HDD industry into wider market segments, applications, and adjacent storage technologies. This service is also available as an add-on for clients subscribing to our NAND/SSD Information Service.

SDAS: HDD Information Service

TRENDFOCUS' exacting, well-timed analysis of HDD supply and demand provides clients with the most comprehensive market research tool available.

NAND/SSD Information Service

TRENDFOCUS' NAND/SSD Information Service provides a unique and evolving data set that includes solid-state storage device forecasts by device type, interface, capacity, exabytes shipped by application, eMMC, and sector penetration by applications including PCs and enterprise applications.

Key Components: Rigid Disk Media/Substrate, Recording Head Information Services

This research provides clients with unique and detailed coverage of the disk media, substrate, and recording head markets.

Management Consulting

TRENDFOCUS has an extensive history of successful project collaborations with global clients. We encourage you to leverage our expertise to address your specialized data needs.

Subscribers to each TRENDFOCUS Information Service will receive the following:

Unique Customer Service and Support

Clients have full access to TRENDFOCUS analysts, at no extra charge. We take pride in our consistently responsive customer support.

Quarterly Updates & Long-Term Forecasts

Comprehensive and timely market updates focusing on key industry metrics.

Executive Briefs and Periodic Installments

Event-driven publications analyzing spot market issues.

FOCUS ON Documents

In depth white papers examining complex market and technology issues.

Daily Global News

Widely sourced global news delivered via email.