



Worldwide Solid State Drive Market

Flash Memory Summit, 2013
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Transforming the Industry

Third Platform for Industry Growth



Social
Business



Mobility



Big Data



Cloud

Data

Emergence of Flash Technology and SSDs are Playing a Key Role

SSDs



Higher Performance – Need for faster access



Better Efficiency – More intelligent use of assets



Cost Effectiveness – Lower TCO, \$/IO



Investments in SSD Technology

SSD Related Mergers and Acquisitions

Date	Acquirer Name	Target Name	Product Segment
July-13	EMC	ScaleIO	Software
July-13	HGST	VeloBit	SSD caching software
July-13			e
May-13			e
April-13			e
March-13			ftware
January-13			e
January-13			e
December-12			ftware
November-12			ftware
August-12			e
June-12			trollers
June-12			e
June-12			trollers
May-12			e
February-12			ftware
January-12	Micron	VirtenSys	Storage hardware
January-12	OCZ	SANRAD	SSD caching software
December-11	Apple	Anobit	NAND Flash controllers
October-11	LSI	SandForce	NAND Flash controllers
May-11	SanDisk	Pliant	Storage hardware
April-11	Silver Lake Partners	SMART Modular	Storage hardware
April-11	STEC	KQ Infotech	Storage hardware
March-11	OCZ	Indilinx	NAND Flash controllers

To capitalize on the opportunity:

- Embrace flash and how it can be leveraged across the portfolio
- Taylor the solution for the targeted applications

Questions?



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