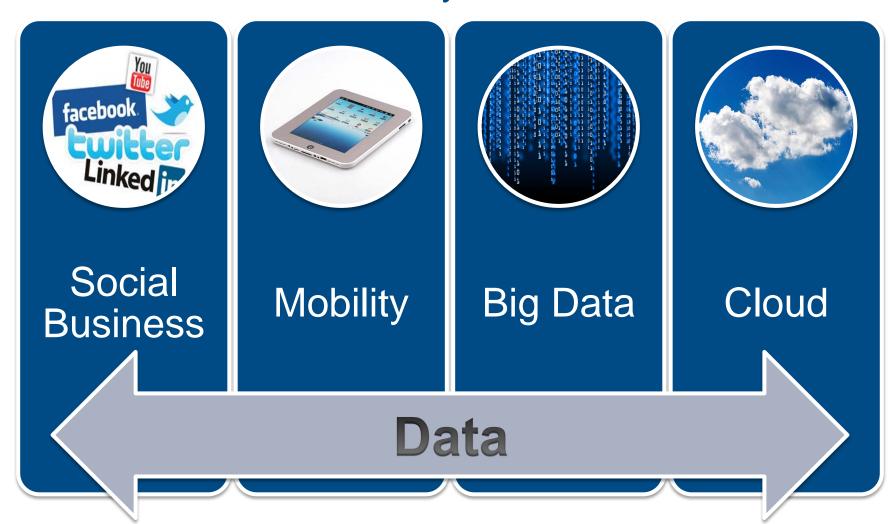




Worldwide Solid State Drive Market

Flash Memory Summit, 2013 Jeff Janukowicz Research Director

Transforming the Industry Third Platform for Industry Growth





Emergence of Flash Technology and SSDs are Playing a Key Role



<u>Higher Performance</u> – 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	VeloRit	SSD caching software	
July-13	To conitalize of	a the apportunit	·	е
May-13	TO Capitalize of	n the opportunit	· y .	е
April-13				е
March-13	Embrace flas	sh and how it ca	n he	tware
January-13	Embrace nac	m and now it sa		е
January-13	leveraged across the portfolio tware			е
December-12	ieveraged ac	ross the portion	10	tware
November-12	a			tware
August-12	Taylor the solution for the targeted			
June-12			9	trollers
June-12	applications			е
June-12	apphoanome			trollers
May-12				е
February-12				tware
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	



Questions?



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