



Worldwide Data Networking, IT and Telecommunications

The Market for Networked Flash Storage

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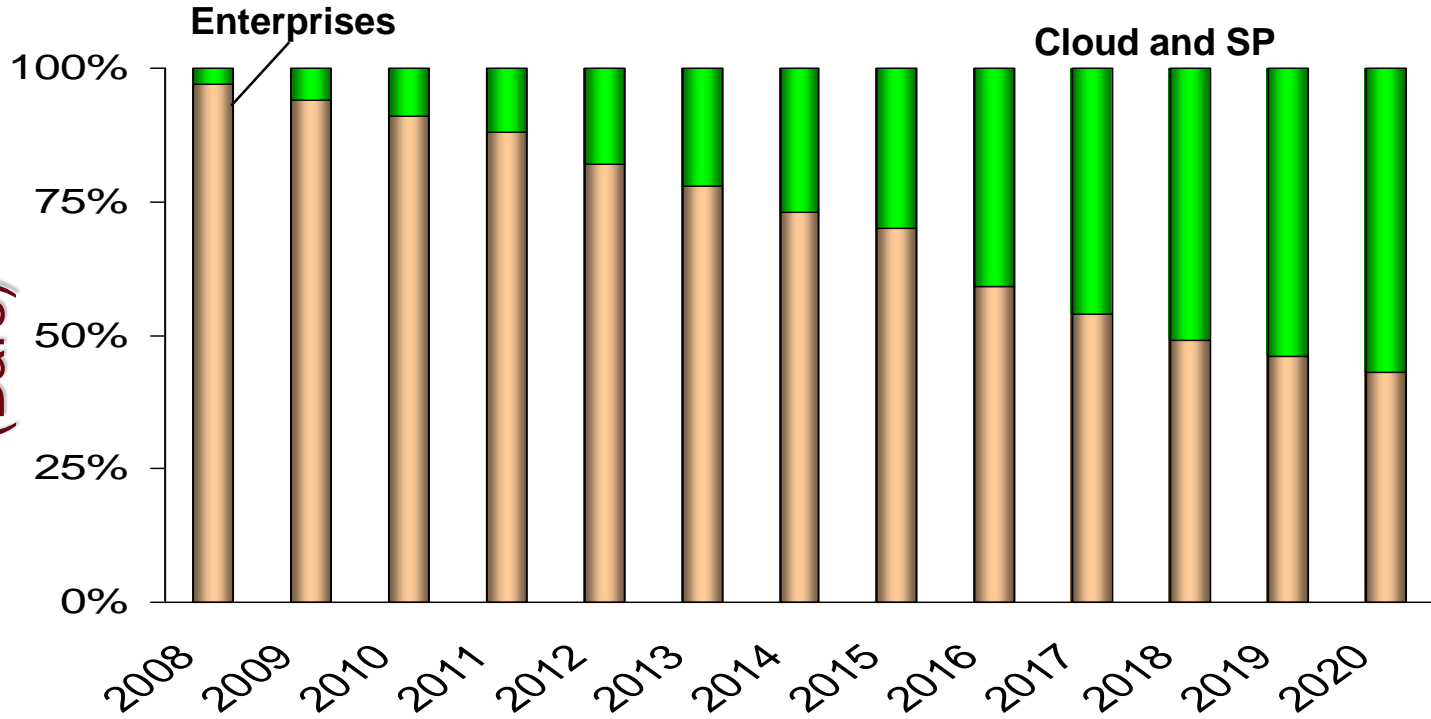


The Market for Networked Flash Storage

- Market Drivers & Forecasts
 - Cloud
 - Flash
 - SDS
 - Port Trends
 - Convergence
 - DAS versus Networked
 - Incumbent Vendors
 - Value Chain

The Market for Networked Flash Storage Server Market Adoption

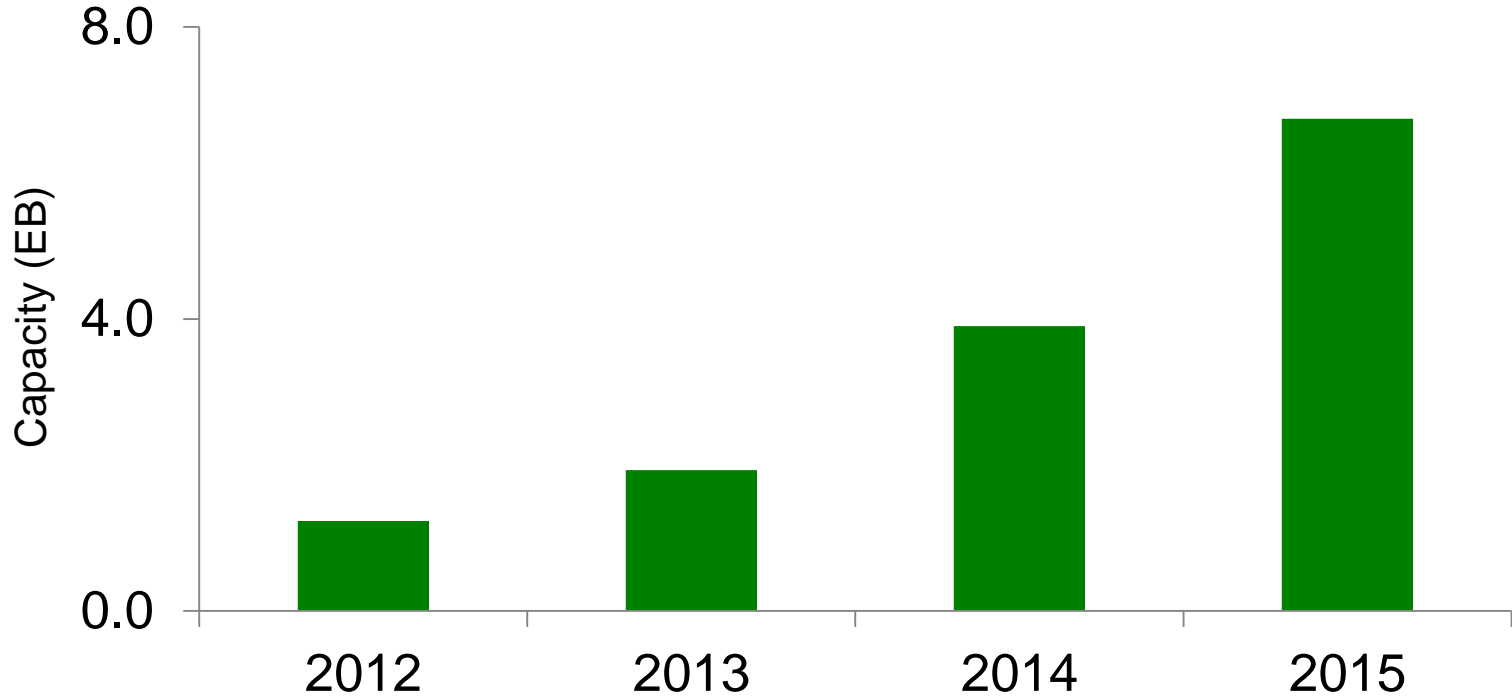
Percent of Server Shipments
(Bars)



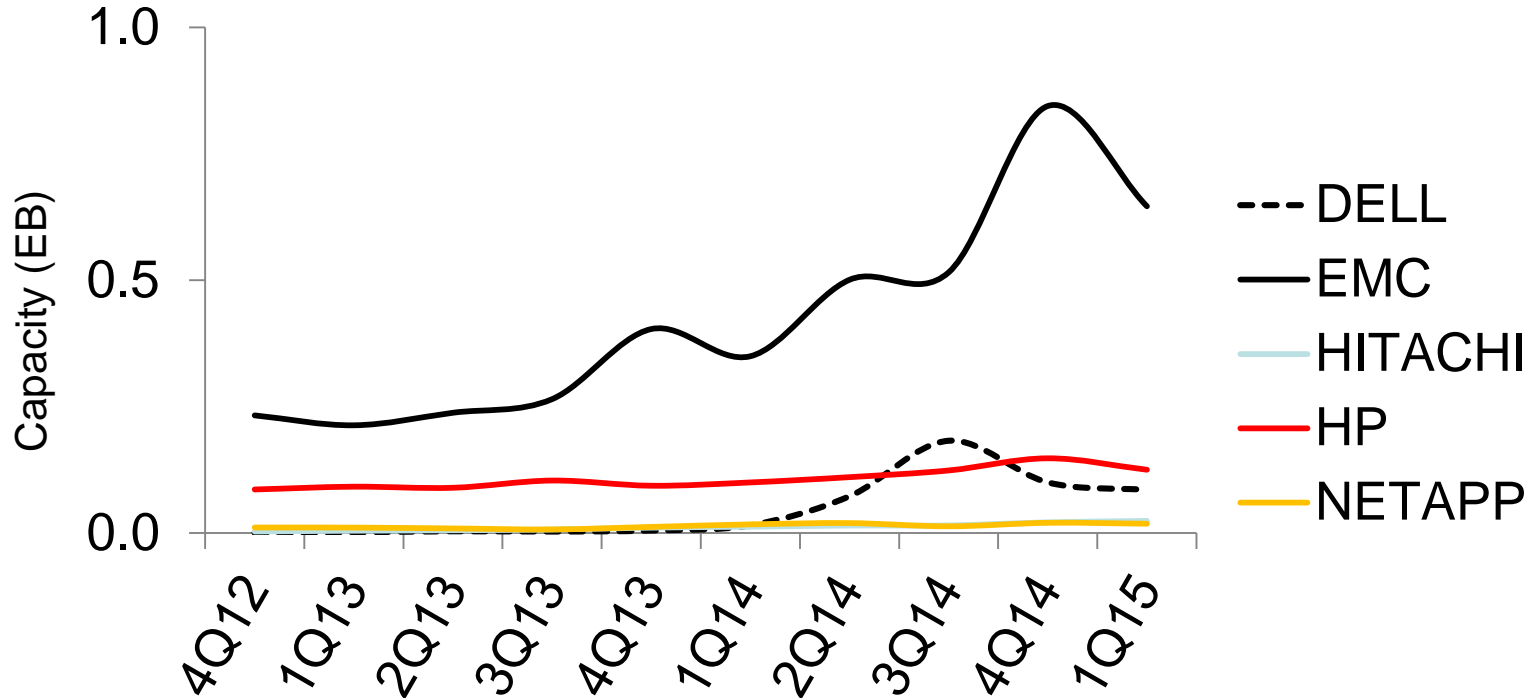
Select Companies Server Installed Base End of 2014



Storage Systems External Flash Systems Shipments

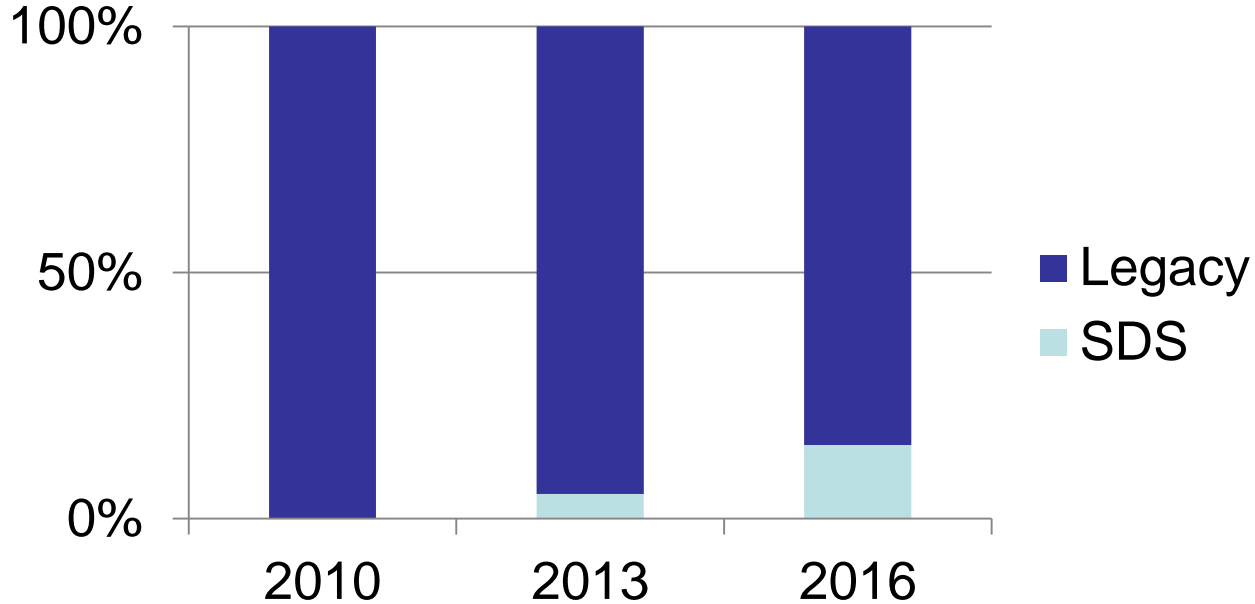


Storage Systems Vendor Landscape (Top 5 – Flash Capacity*)



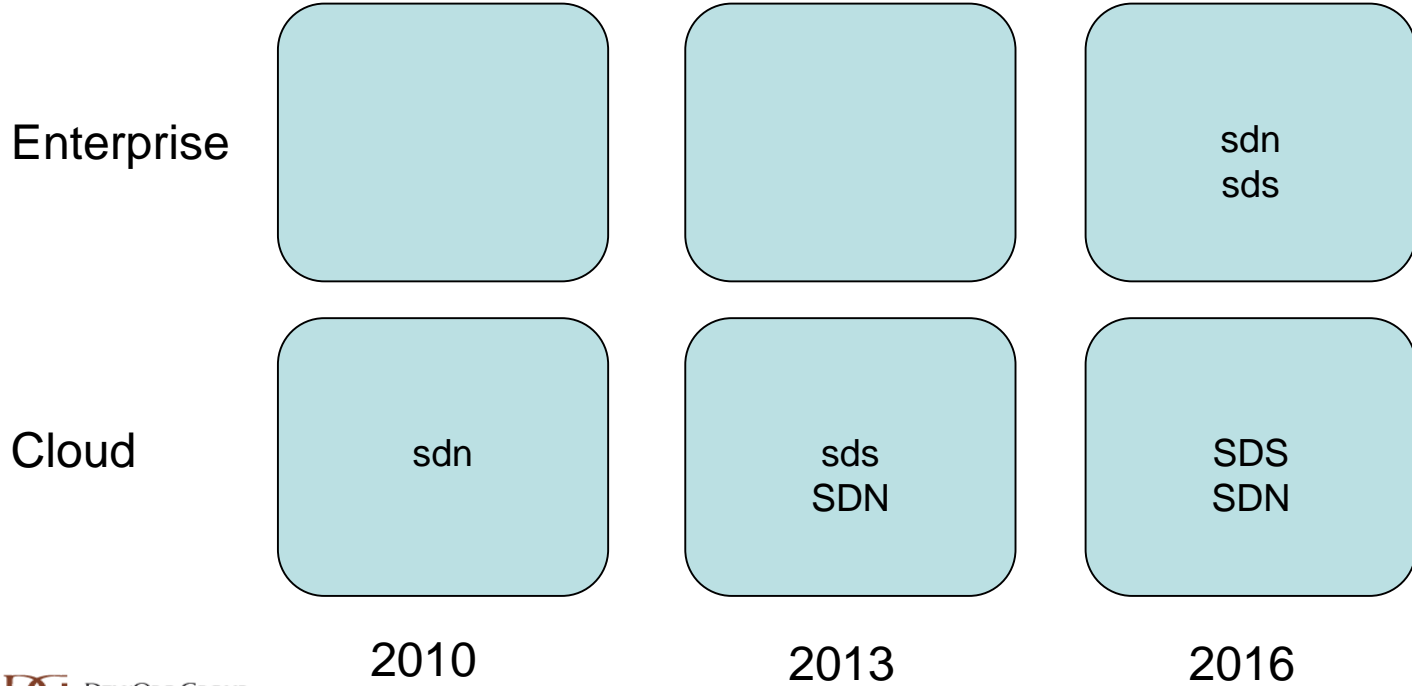
*External Storage Systems

SDS Trend in Storage

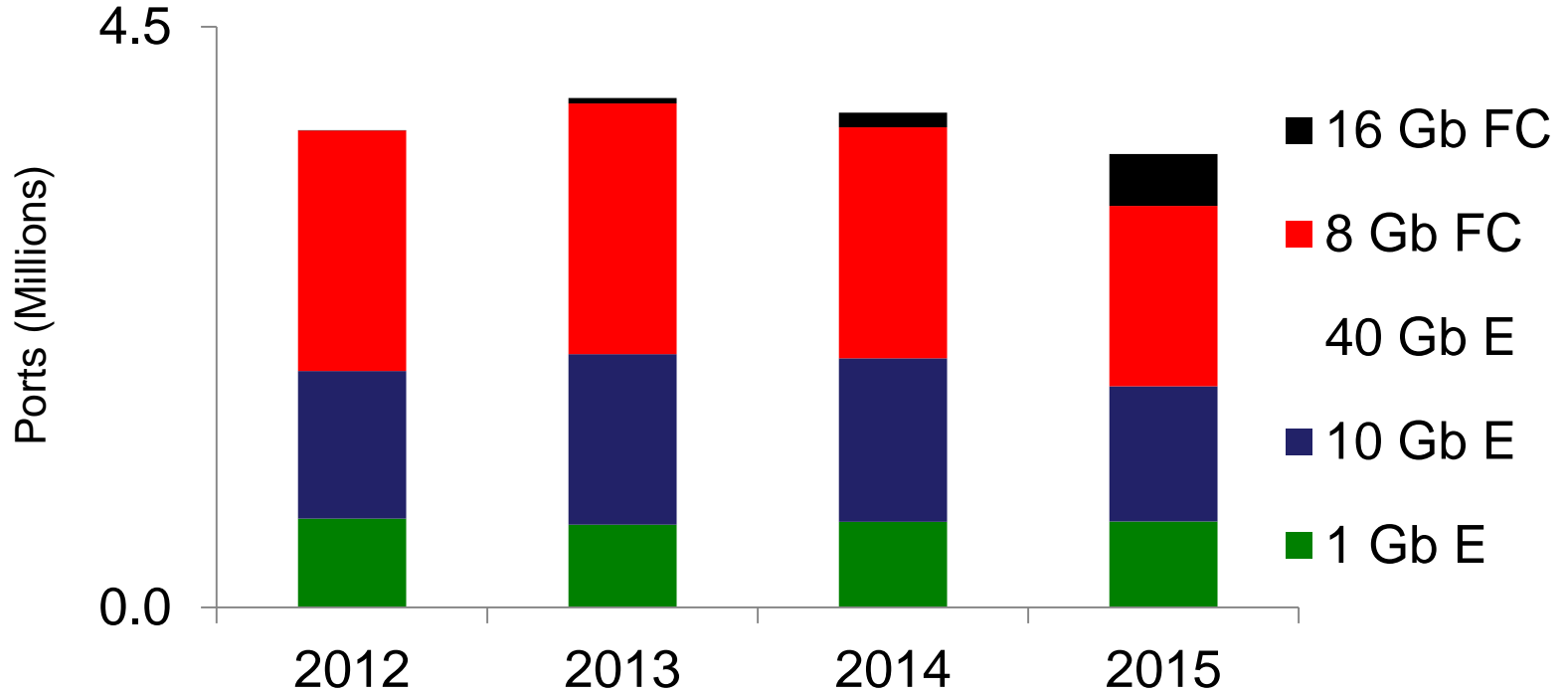


Source: Dell'Oro Group

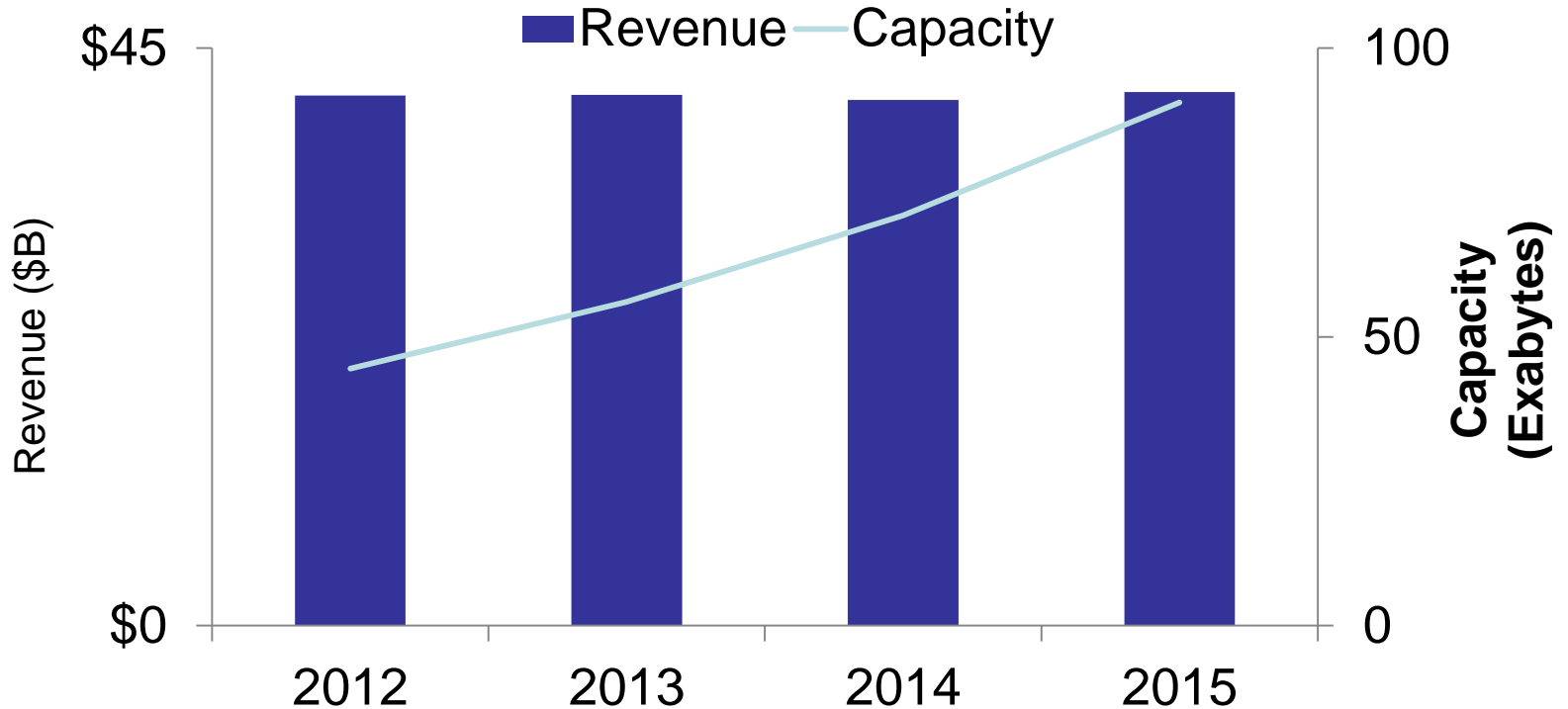
Transition to SDS



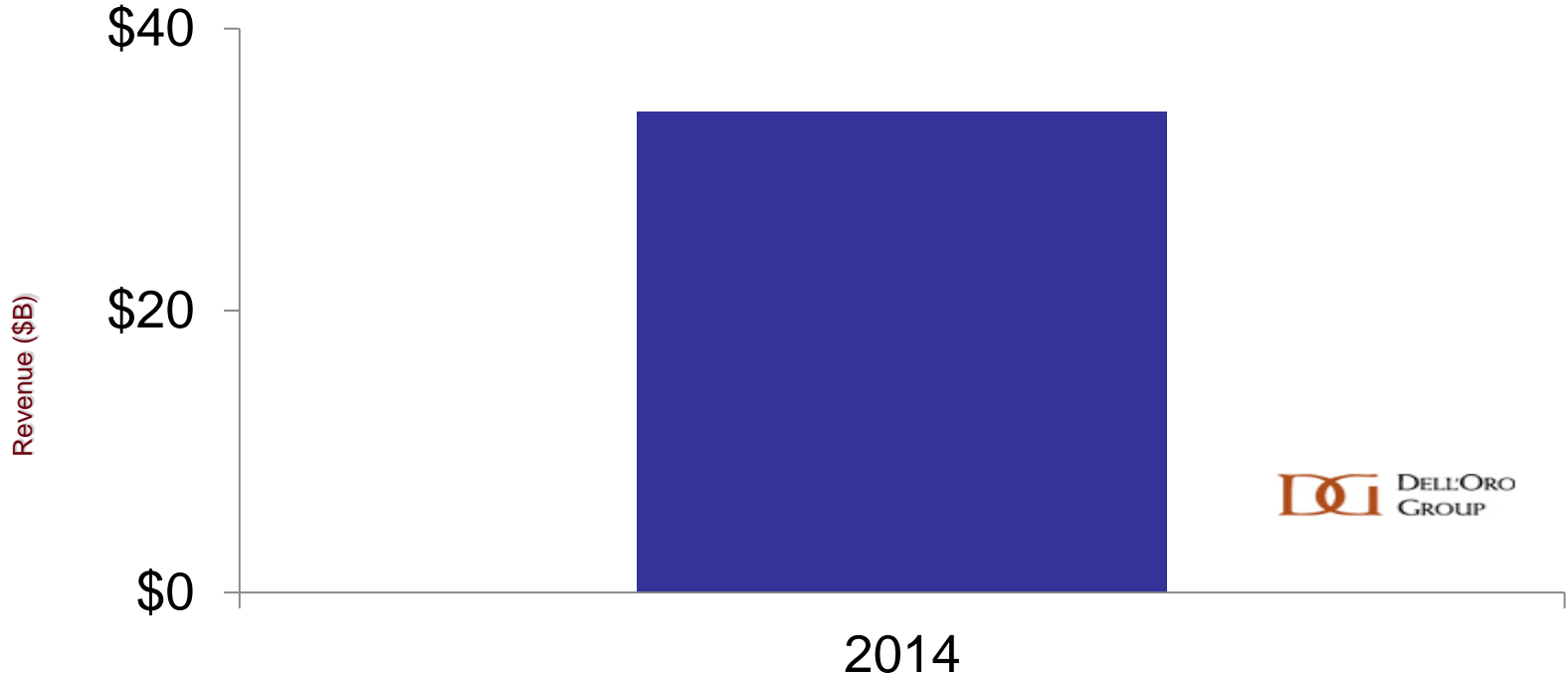
Storage Systems External Networked Ports ('12-'15)



Storage Systems Market Revenues and Capacity ('12-'15)

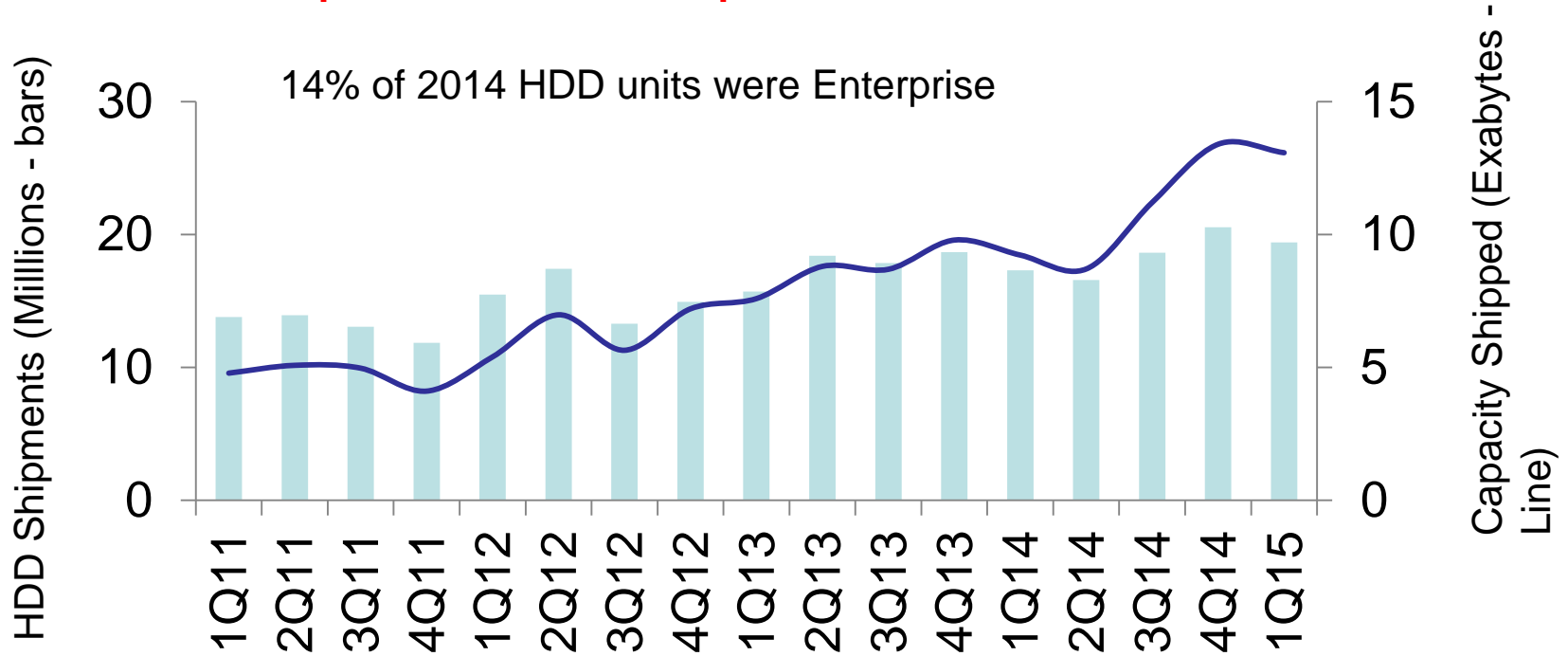


The Market for Networked Flash Storage Worldwide HDD Revenues



Sources: HDD suppliers plus DG estimates

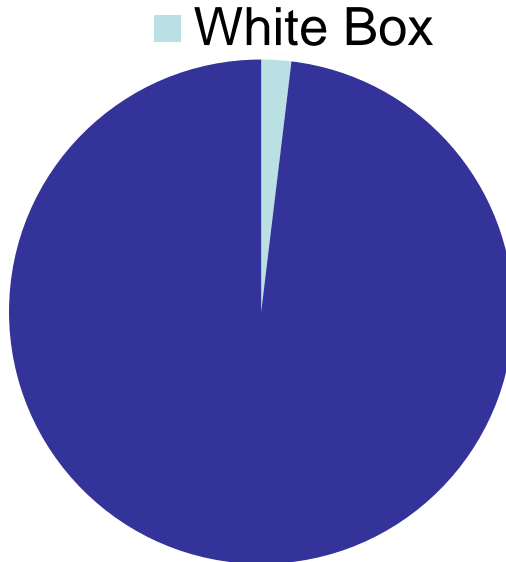
The Market for Networked Flash Storage Enterprise HDD Shipments



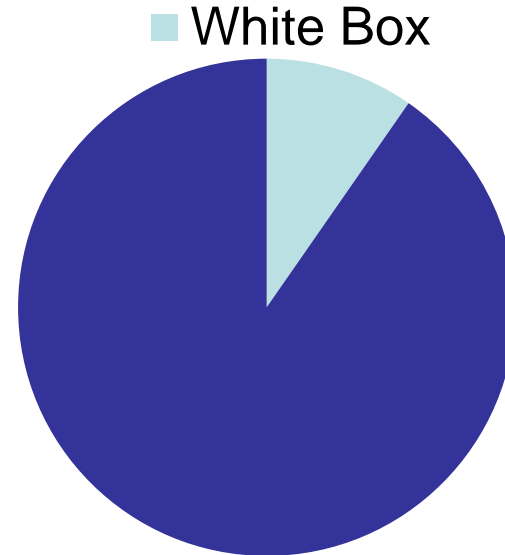
Sources: HDD suppliers plus DG estimates

The Market for Networked Flash Storage Systems Level White Box Effect – 1Q15

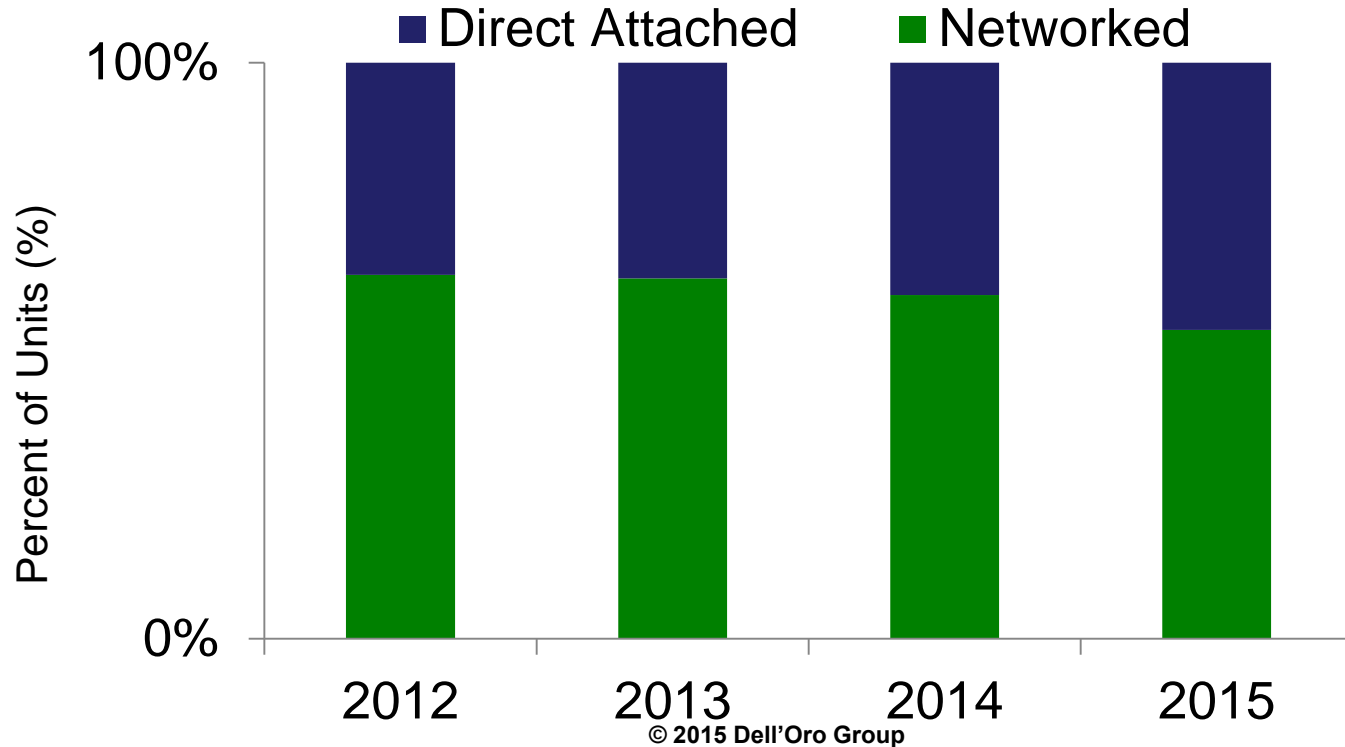
Percent of Revenue



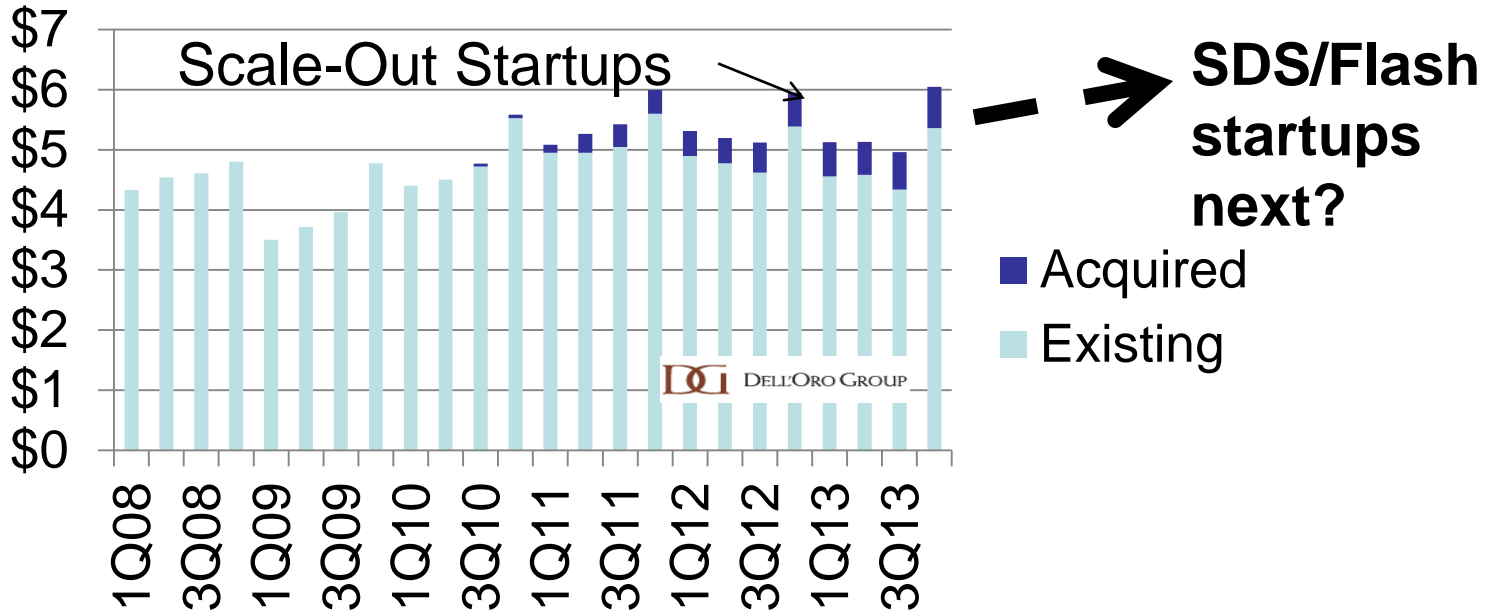
Percent of Capacity



Storage Systems Networked versus Direct Attached ('12-'15)



Incumbent Vendors Acquisitions



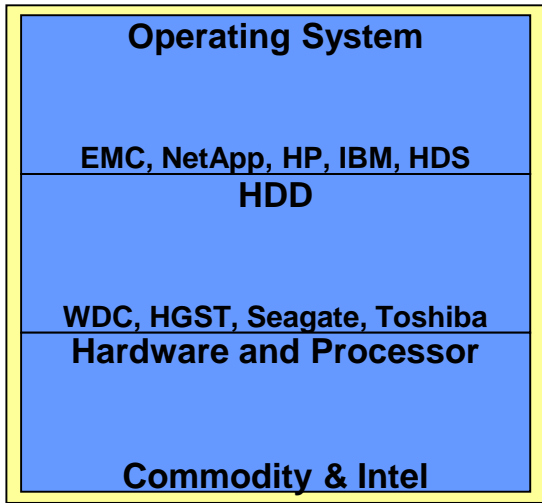
Source: Dell'Oro Group

The Market for Networked Flash Storage Storage

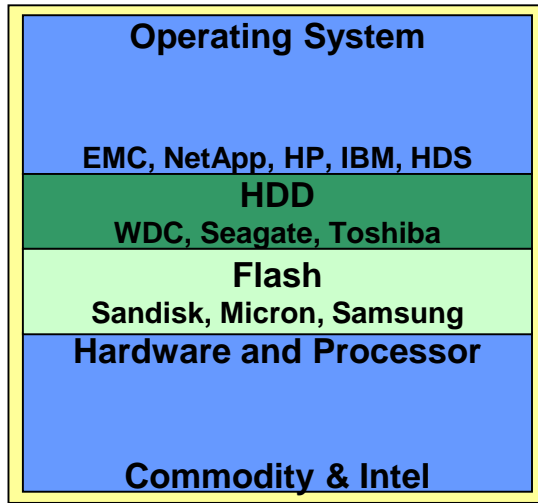


Value Chain Evolution

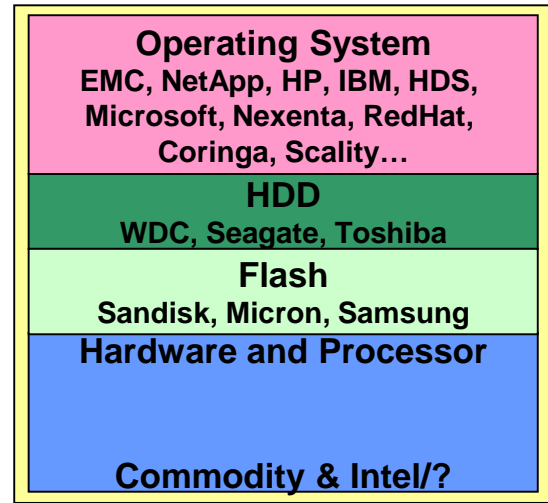
2012



2014



2016





The Market for Networked Flash Storage Open Discussion

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