

TRENDFOCUS

The Data Storage Industry's Most Trusted Market Intelligence



Pioneering analysis in SSDs,
HDDs, NAND in Cloud, Enterprise,
and Client Markets

NEW For 2020

- ▶ HAMR, MAMR reporting and target applications, capacities
- ▶ Hyperscale units and exabytes for nearline HDDs and eSSDs, and server vs. storage for performance enterprise HDDs



Why TRENDFOCUS?

We help vendors, customers, suppliers and investors discover and understand the hidden trends in data storage, cloud computing, and the market dynamics surrounding them.

Partner with industry veterans who go the extra mile, with ZERO added fees.

Our analysts collaborate seamlessly across market segments to provide a balanced perspective.

Enjoy open collaboration and consistent views of the trends that matter.

We're a closely connected team that thrives on open collaboration, and we know finding the right answer is more important than winning a debate. We offer bespoke consultations and presentations and partner side-by-side with our clients on market and product strategy sessions, team brainstorms and executive presentations.

Find — and tell — the story behind the numbers.

Because we see the entire ecosystem, we help our clients see the stories behind the numbers and lead them to even more actionable insights.

Laser-focused on the questions that matter most.

Whether you're looking to confirm a hunch or challenge an assumption, understand changes in your current markets or explore new ones, our entire portfolio of products and services is aimed at addressing your most strategic business questions.

With an unbiased, independent view, we offer our Information Services in multiple categories across data storage and cloud computing markets, and can custom-tailor an engagement that's just right for you.

We are the data storage industry's premier market research and consulting firm and the only company providing detailed market and technical analysis of the entire industry supply chain.



With over 70 clients in the U.S., Asia, and Europe, our distinctive research method blends both “top down/bottom up” and 360 statistical analysis providing our clients with the exacting global data set needed to make complex decisions in today’s environment. TRENDFOCUS clients include global

stakeholders in enterprise storage architectures, computing, storage, components, and investment communities.

What excites us the most is when we’re able to help our clients discover unexpected data trends, explore hidden risks and new opportunities, and illuminate their unknown unknowns. We believe in building the kind of relationships that make TRENDFOCUS the only logical choice for your strategic and tactical market analysis needs.

Our research expertise encompasses:

- ▶ Cloud, hyperscale, and enterprise storage, HDD and SSD storage for PCs, supply chain for HDDs, NAND and SSD, media and substrates, heads, equipment and materials
- ▶ Market segments & demand interconnects
- ▶ Enterprise storage, personal computers, consumer electronics, solid state drives, external drives
- ▶ Transitions and capital spending, risk assessment of infrastructure

Our research focus includes:

- ▶ Supply/demand trend analyses — shipments, market shares, and pricing
- ▶ Technology — roadmaps, enablers, and disruptors
- ▶ Capital investment upgrades and trends
- ▶ Demand interconnects into the wider computing ecosystem
- ▶ Competitive analysis and risk assessments



TALENT

- Unparalleled industry expertise
- Unlimited access to senior analysts
- Culture of collaboration



PERSPECTIVE

- 360-view of your entire ecosystem
- Global expertise and insights
- Intuitive understanding of competitive pressures



IMPACT

- Management consulting experience
- Focus on business trends, not just market projections
- Ability to illuminate blind spots



AGILITY

- Speed of delivery and insights while they still matter
- Customizable data views
- Flexible engagement model that scales to whatever you need

TRENDFOCUS Information Services

Cloud, Hyperscale, & Enterprise Storage Service

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

New for 2020: Cloud, Hyperscale and Enterprise Storage Service Mid-Quarter Updates highlighting storage demand by specific enterprise and data center end markets for both HDDs and SSDs.

SDAS: HDD Information Service

Our systematic, exacting, and timely analysis of the entire HDD value chain is the leading resource on global HDD strategies and provides clients with an all-inclusive market research tool. Executive teams, financial analysts, marketing professionals, and component and equipment manufacturers rely on the SDAS: HDD Information Service as the gold standard of HDD market research data.

NAND/SSD Information Service

The NAND/SSD Information Service employs our six-part data delivery model and provides a unique, evolving data set on NAND and SSDs.

We provide solid-state storage device forecasts that display units and exabytes shipped by form factor with details regarding both client and enterprise-type devices.

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. Our increased analysis covers enterprise storage, PCs, consumer electronics, surveillance, and external drives.

HDD Recording Head Service

A foundation of our unmatched HDD coverage, the HDD Recording Head Information Service provides an authoritative analysis tool for HDD and recording head manufacturers, providing insight into effects on suspension suppliers, capital equipment vendors, and materials companies.

Rigid Disk Media and Substrate Service

Truly a unique research service, TRENDFOCUS provides market intelligence dedicated to the rigid disk media and substrate segments. One of the pillars of our unprecedented HDD coverage, this service enables clients to drive highly tactical and strategic business decisions throughout their organizations.

Subscribers to each TRENDFOCUS Information Service receive:

- ▶ Unlimited access to analysts at no extra charge
- ▶ Extremely detailed, rolling four-quarter forecasts, twice-yearly five-year forecasts of units, exabytes, revenue
- ▶ Periodic Installments and Executive Briefs, providing concise, rapid analysis of industry events and trends
- ▶ FOCUS On whitepapers
- ▶ Daily global technology news links