

The background is a solid blue color with various abstract geometric patterns. There are several clusters of circles of different sizes and colors (some solid blue, some white outlines) scattered across the page. There are also faint, light blue lines and shapes that resemble data visualizations or network diagrams. The overall aesthetic is clean, modern, and tech-oriented.

# TREND FOCUS

The Data Storage Industry's  
Most Trusted Market Intelligence

## Research Expertise In:

### **HDD & SSD Storage & Supply Chain**

*Hard Disk Drives, Solid State Drives*

*Media, Substrates, and Heads*

*Equipment and Materials*

### **Market Segments & Demand Interconnects**

*Enterprise Storage*

*Personal Computers & Tablets*

*Consumer Electronics*

*Solid State Drives*

*External Drives*

### **Technology**

*Transitions and Capital Spending*

*Risk Assessment of Infrastructure*

## The Data Storage Industry's Most Trusted Market Intelligence

TRENDFOCUS' distinctive research method blends both "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.

Our research focus includes:

- ▶ Supply/demand trend analyses: production plans vs. demand, 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

TRENDFOCUS clients include global stakeholders in the computing, storage, and investment communities. We believe in building the kind of relationships that make TRENDFOCUS the only logical choice for your strategic and tactical market analysis needs.

## New For 2011-2012

### **Tracking the Tablet Phenomenon**

The emergence of tablets may fundamentally change the evolution of PCs – and the demand for storage. Client will receive exacting trend analysis on unit shipments, "cannibalization" of the PC market, and changes to storage demand patterns.

### **Unique TAM/HDD Build Ratio**

TRENDFOCUS will provide timely updates to a unique ratio between the HDD TAM and ever-changing production schedules. The resulting data and insight will be a valuable tool for all companies in the storage ecosystem.

### **Expanded SSD/NAND Coverage**

Changing NAND pricing, tablets, and evolving customer demand are driving massive change. TRENDFOCUS is increasing its deliverables in SSD/NAND to give greater clarity on shipments, pricing, and market penetration.

# TRENDFOCUS Information Services

ENTERPRISE  
STORAGE

PCs & TABLETS

CONSUMER  
ELECTRONICS

SOLID STATE  
DRIVES

EXTERNAL  
DRIVES

## Storage Interlinks Service (SI)

Available **only** to SDAS clients, SI analyzes the critical interconnections of the HDD industry into wider market segments, applications, and adjacent storage technologies. Our increased analysis includes: the evolution of tablets and PCs, new and existing market trends, enhanced market share data, customer/supplier relationships, technology trends, capacity updates, and more!

## SDAS: HDD Information Service

TRENDFOCUS' flagship service is the leading resource on global HDD strategies. Our systemic, exacting, and well-timed analysis of the entire HDD manufacturing value chain provides clients with an all-inclusive market research tool.

### Rigid Disk Media & Substrate Information Service

The industry's most detailed coverage of the rigid disk and substrate markets provides HDD suppliers and equipment vendors an unprecedented view of this distinctive industry.

### Recording Head Information Service

Tailored to the needs of HDD suppliers, head assemblers, suspension companies, and equipment vendors, this exacting data set provides complete coverage of the recording head market.

## Proprietary Consulting

TRENDFOCUS has an extensive history of successful project collaborations with global clients. We encourage you to leverage our expertise. Contact us with your needs!

## Subscribers to each TRENDFOCUS Information Service will receive the following:

### Quarterly Updates & Annual Five-Year Forecast

Comprehensive and timely market updates focusing on key industry metrics.

### Executive Briefs

Event-driven publications analyzing spot market issues.

### FOCUS ON Documents

Examining complex market and technology issues.

### Periodic Installments

Timely reviews of new product announcements, financial disclosures, and M&A activities.

### Online Competitive Analysis

Dynamic updated profiles of key companies.

### Daily Global News

Widely sourced global news delivered via email.

## TRENDFOCUS' analysts have more practical HDD 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 almost 25 years researching and consulting in the HDD, 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 also the Chairman of the Global Board of Directors of IDEMA, the trade association for the data storage industry.

**John Kim**, Vice President, is our senior analyst and is leading TRENDFOCUS' expertise in demand interconnects for enterprise storage, personal computing, CE, and external storage. Mr. Kim has more than 20 years of HDD industry experience, including 12 years with TRENDFOCUS. From 1991 to 1998 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.

**John Chen** is Senior Director of HDD and component research, and is spearheading the company's efforts in SSDs, technology transitions, and capital spending. His experience in the data storage industry spans more than 20 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 marketing roles in the optical networking sector and provided key technical input in various M&A and intellectual property marketing activities.

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